



Jobs *transform* lives

Gig economy

The Uberisation of work



In association with:



Recruitment &
Employment
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FOREWORD

The 'gig economy' is one of the biggest trends emerging in the recruitment landscape and it's set to grow rapidly over the next decade. Our leading edge research takes a serious look at this emergent part of our industry.

While researching we found a huge amount of confusion about what the gig economy is and the potential impact it may have on employment. This report highlights the key questions and concerns on behalf of the UK's £31.5 billion recruitment industry and makes recommendations to business, policy experts and, more importantly, our members.

The UK's dynamic recruitment industry is a major reason why our labour market has outperformed the vast majority of our international competitors over recent years. The UK currently has a record number of people in work and rapidly falling unemployment. However, a major constraint on economic growth is the skills and talent shortages which are close to becoming a full-blown crisis. We are now entering a period of economic uncertainty caused by the EU referendum. To ensure the continued success of our jobs market we must understand and harness developments including new technology which facilitates gig working. This will enable businesses to get the people, skills and talent they need. At the same time we must ensure that the freelancers, interims and contractors who find their next gig this way are protected. For the recruitment industry we want a level playing field in which to compete.

Employers are starting to use digital work platforms in increasing numbers. Six per cent of employers currently use them to recruit, but 29 per cent think they will be important to their business in the next five years. That's a potential huge increase in usage – almost five times as many employers could be using them by 2021, or almost a third of UK employers.

Digital work platforms are already throwing up both opportunities and challenges. At the REC our job is to make sure our members are well prepared for the future. Recruiters will have to decide whether to embrace or compete with these new job platforms. Are they just another way of attracting candidates? Or do they diminish the value we create for clients and candidates alike? If you're in the contingent talent market, digital work platforms will be significant and you should be thinking about your business's strategic response now.

The REC champions good recruitment and we have been leading a national debate on what it looks like while promoting best practice to employers. We encourage employers to sign up to the Good Recruitment Campaign to improve workforce planning, ensure an authentic employer brand and deliver a great candidate experience every time.

The gig economy is having a huge impact on the UK jobs market. We will work on behalf of the recruitment industry with government and employers to ensure good practice remains at the forefront as gig working becomes more commonplace.

We welcome your feedback on this research.

Kevin Green, Chief Executive, REC
[@kevingreenrec](https://twitter.com/kevingreenrec)

FOREWORD

The world of work is changing: more people than ever are choosing self-employment or temporary jobs over full-time, permanent roles. The internet is a huge driver of this trend and has changed the way people search for jobs, whether they use job sites like ours or digital work platforms.

With over 180 million unique visitors per month on *Indeed*, we have a front row seat for observing major trends in the labour market. We are fascinated by whether we might be moving to a world of work where millions of people set their own schedules, clocking in and out on their smartphones. Will employers become reliant on armies of freelancers?

As such, we have proudly partnered with the REC on its report *Gig Economy – The Uberisation of Work*, examining the challenges and opportunities faced by employers, recruiters and candidates which stem from new technology. The emergence of digital work platforms is creating a wealth of opportunities for the temporary market, with flexible working a driving force behind the gig economy.

We also know that employers have concerns about the risks involved with these new ways of recruiting. Now is the time to ask questions about the direction in which we are heading, so that the future of work meets collective needs. Ultimately, all stakeholders involved need to understand and react to the way work is shifting.

At *Indeed*, our mission is to help people get jobs. No matter what the recruitment landscape looks like, good recruitment is essential because jobs transform lives and great people transform businesses. We are proud to be partners with the REC for the Good Recruitment Campaign, which sets out principles for all employers to strive for as the way forward for recruitment.

Since the Good Recruitment Campaign launched, more than 130 organisations have signed up, pledging to promote diversity and inclusion, offer flexible working arrangements, provide an excellent candidate experience and lead the way to promote ethical and professional recruitment practices.

Indeed are proud partners with the REC in this endeavour, and we hope this report will encourage continued engagement between employers, recruiters, candidates and policymakers to protect and augment the future of work in the UK.

Bill Richards, UK Managing Director, Indeed

ACKNOWLEDGEMENTS

We would like to thank and acknowledge the following people for participating in this research. The considered responses you provided are all very much appreciated.

- Les Berridge, Lead Consultant, Networkers International; Vice Chair, REC Technology sector group
- Chris Bryce, CEO, IPSE
- Rt Hon Liam Byrne MP
- Simon Conington, Managing Director, BPS World; Chairman, REC Engineering and Technical sector group
- Benedict Dellot, Associate Director, Economy, Enterprise and Manufacturing, RSA
- Simon Drake, Partner, Exact Expertise; Chairman, REC IMA sector group
- Kevin Green, CEO, REC
- Joe Griston, Director of People and Talent, Freelancer.com
- Laura Hegarty, PR Manager, Indeed
- Stephane Kasriel, CEO, Upwork
- Mariano Mamertino, Economist for EMEA, Indeed
- Emma Stewart, Joint CEO, Timewise
- Daniel Tomlinson, Researcher, Resolution Foundation

This research was conducted and authored by Dr Diana Beech, Senior Researcher at the REC.

With special thanks to Layla Fazal, REC Communications and Research Officer, for her assistance with organising, conducting and transcribing the background research.

**THE TRADITIONAL
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STEPHANE KASRIEL, UPWORK

01

**EXECUTIVE
SUMMARY**

The central sections of this report delineate the main opportunities that the gig economy holds for employers, recruiters and candidates alike. In doing so, they highlight the main concerns that need to be addressed in order to make the gig economy work to the benefit of each of its key stakeholder groups.

The impact of the gig economy on employers, recruiters and candidates can be summarised as follows:

Employers

Opportunities	Risks
It speeds up the recruitment process.	It still requires an element of screening.
It offers access to a global candidate base.	It may require new protocols and structures.
It reduces the cost of permanent hires.	It risks workers' loyalty to the employer brand.

Recruiters

Opportunities	Risks
It adds another tool to a recruiter's repertoire.	It risks replacing the contingent, lower end of the recruitment market.
It allows recruiters to better hone their service offerings to employers.	It threatens industry standards because of the unregulated nature of the sector.
It allows true recruitment professionals to stand out in the market.	It risks aggravating the recruitment community over the regulatory injustices between the sectors.

Candidates

Opportunities	Risks
It gives them flexibility.	It is an insecure way of working.
It allows them to set their own price.	It risks devaluing their worth.
It opens them up to a global marketplace.	It lacks traditional employment protections.

In order for employers, recruiters and candidates to benefit from the opportunities listed above, the onus is now on the government and big businesses to address the accompanying concerns that are currently casting a shadow over the potential future success of the gig economy in the UK.

**THE GIG ECONOMY
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FUNCTIONS.**

RT HON LIAM BYRNE MP

02

INTRODUCTION

The world of work is changing. In our increasingly flexible labour market, the notion of a 'job for life' and the concept of a '9–5' workday is diminishing. In its place, the idea of 'gig working' is rapidly gaining ground. Briefly defined, gig working is when people opt to assume temporary, often ad hoc, work contracts (or 'gigs') sourced online through digital, cloud-based marketplaces. The recent growth of online capital platforms such as Uber and Airbnb has given rise to a global sharing economy – also dubbed the 'gig economy' – in which it is becoming ever more commonplace to buy and sell jobs and services online across the world. Digital work platforms such as Upwork and Freelancer.com are symptomatic of the 'Uberisation' of work, as they allow businesses to contract workers for short-term engagements, or specific projects, for a defined period of time.

As the 'gig economy' has grown over recent years, so too have debates about its place and value to the global labour market. Confusion has arisen around what exactly it constitutes and how it impacts employers, recruiters and workers alike. Some see online talent platforms as 'clearinghouses' with the potential to inject new momentum into the jobs market. The McKinsey Global Institute calculates that by 2025, digital work platforms could add \$2.7 trillion, or 2.0%, to global GDP, increasing employment by 72 million full-time equivalent positions. For the UK, that equates to £45 billion and extra work for 766,000 people. The study estimates that up to 200 million people around the world could personally benefit from using digital work platforms, specifically by allowing the unemployed to find work as freelancers or by allowing part-time workers to work additional hours on a supplementary basis.¹

The gig economy has recognised benefits for workers and consumers alike. Gig working through online talent marketplaces can liberate the workforce: it affords people the chance to experiment before changing careers, to pursue their interests for a profit outside traditional employment, or simply to have the freedom and flexibility to be their own boss.² As the gig economy grows, consumers of online platforms are also thought to be set to benefit from lower prices and an increased quality of goods and services.³

As far as businesses are concerned, the gig economy provides particular opportunities for SMEs to find additional clients and to access the global talent pool. Sourcing workers from online talent marketplaces allows companies the flexibility to scale their workforce up or down as needed, ultimately helping businesses to keep costs low and company morale high.⁴ Entrepreneurs, in

1 Manyika, J., Lund, S., Robinson, K., Valentino, J. and Dobbs, R. (2015) *Connecting talent with opportunity in the digital age*. McKinsey Global Institute. Available at: www.mckinsey.com/global-themes/employment-and-growth/connecting-talent-with-opportunity-in-the-digital-age [Accessed 13 July 2016].

2 TSheets. (2016) *What is the gig economy and how does it impact employees?* TSheets. Available at: www.tsheets.com/resources/gig-economy-employees [Accessed 13 July 2016].

3 Goudin, P. (2016) *The cost of non-Europe in the sharing economy: economic, social and legal challenges and opportunities*. European Parliamentary Research Service. Available at: [www.europarl.europa.eu/RegData/etudes/STUD/2016/558777/EPRS_STU\(2016\)558777_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2016/558777/EPRS_STU(2016)558777_EN.pdf) [Accessed 13 July 2016].

4 Petersen, H. (2016) *Gig economy – Will it reshape SMEs?* *Run Your Business*. 1 April.

recognising they cannot do everything themselves, see gig workers as a way of getting good results for the lowest possible outlay. The fact that gig workers are also 'management-light' allows clients to get on with the day-to-day running of their businesses instead of wasting precious time with administration or inductions.⁵

Although largely associated with the rise of self-employment, much of the negative debate about the gig economy has positioned this type of gig working as a response to the 'commoditisation' of the labour market. This means, rather than being driven by workers' preferences to work flexibly, many argue that the gig economy is the result of employers' attempts to drive down costs and avoid unnecessary permanent hires – particularly during the start-up stages of business or during periods of economic uncertainty. It has been claimed that the legislative divisions between 'employees' and the 'self-employed' is making it artificially cheaper for businesses to move away from the traditional 'employer–employee' model of working and towards an insecure 'firm–contractor' relationship instead.⁶ Since self-employed 'gig workers' are engaged outside established systems of social security and the protections these afford – prohibiting access, among others, to pensions, statutory sick pay and holiday entitlement – many have come to see the gig economy as unfairly transferring risk and insecurity onto workers themselves. It is for this reason that gig workers may be seen as exploited workers, who are self-employed in name only.⁷

In addition, questions of regulation have long dominated discussions about the gig economy. As most labour transactions take place via an online intermediary, concerns have been raised over this new platform-managed market, which makes it difficult to enforce compliance with existing labour standards.⁸ As the speed of innovation of these sites appears to be outstripping our ability to regulate the sector effectively, the continual rise of digital work platforms poses fresh challenges to government, employers and regulatory bodies alike. The World Economic Forum believes that responsible digital platform businesses will need to be a core part of shaping our new labour market and designing a new social contract for the future. By implication, then, it is the actions of our leaders today that will determine whether the future growth of platform-enabled work will really maximise opportunities for all strata of our society.⁹

In an attempt to add some clarity to this new way of working, and give policy-makers and business leaders the essential opportunity to understand and shape debates in this area, this research defines what the gig economy is and how it is impacting the world of work. The main body of this report discusses what the gig economy means for the key stakeholders involved in it – namely employers,

5 Hoque, F. (2015) How the rising gig economy is reshaping businesses. *Fast Company*. 22 September.

6 Broughton, N. and Richards, B. (2016) *Tough gig: low paid self-employment in London and the UK*. Social Market Foundation. Available at: www.smf.co.uk/publications/tough-gig-low-paid-self-employment-in-london-and-the-uk [Accessed 13 July 2016].

7 Brinkley, I. (2015) Ditch your assumptions about Uber and Airbnb: the 'gig economy' is no game-changer. *Guardian*. 19 August.

8 Berg, J. (2016) *Income security in the on-demand economy: findings and policy lessons from a survey of crowdworkers*. Geneva: International Labour Organization (ILO).

9 Zahidi, S. (2016) *The gig economy is changing the way we work. Now regulation must catch up*. World Economic Forum Global Agenda. Available at: www.weforum.org/agenda/2016/06/gig-economy-changing-work [Accessed 13 July 2016].

recruiters and independent workers. In doing so, it identifies some of the myths and key concerns surrounding the gig economy from the perspective of each of these stakeholder groups and attempts to clarify the risks and opportunities that this type of working gives rise to through insights and analysis from industry experts. Since this new method of gig working shows no signs of stopping, this report concludes by examining what changes are needed to better support gig workers in the future. It therefore makes recommendations to government, employers, recruiters and candidates to help the UK embrace the projected 'Uberisation' of the workplace and shape this new mode of working for the greater good of British workers and the UK economy.

Methodology

This report is the result of a mix of quantitative and qualitative research.

The following research activities underpin this report:

1. A YouGov business survey with a total sample size of 614 senior decision-makers from British businesses. The survey fieldwork was undertaken 6–9 June 2016. The survey was carried out online. The figures have been weighted and are representative of all GB business size.
2. A five-part topical question asked by ComRes as part of the monthly REC *JobsOutlook* tracking survey. ComRes interviewed 200 employees and business owners involved in hiring by telephone from 1–21 June 2016. Data were weighted to be representative of UK adults in employment by region, broad industry sector and public/private split.
ComRes is a member of the British Polling Council and abides by its rules. Data tables are available at www.comres.co.uk.
3. Telephone interviews with representatives of digital work platforms:
 - Joe Griston, Director of People and Talent, Freelancer.com
 - Stephane Kasriel, CEO, Upwork.
4. A mix of telephone and face-to-face interviews with REC members:
 - Les Berridge, Lead Consultant, Networkers International; Vice Chair, REC Technology sector group
 - Simon Conington, Managing Director, BPS World; Chairman, REC Engineering and Technical sector group
 - Simon Drake, Partner, Exact Expertise; Chairman, REC IMA sector group.
5. A mix of telephone and face-to-face interviews with industry experts and external stakeholders:
 - Chris Bryce, CEO, IPSE
 - Rt Hon Liam Byrne MP
 - Benedict Dellot, Associate Director, Economy, Enterprise and Manufacturing, RSA
 - Kevin Green, CEO, REC
 - Laura Hegarty, PR Manager, Indeed

- Mariano Mamertino, Economic Research Analyst, Indeed
- Emma Stewart, Joint CEO, Timewise
- Daniel Tomlinson, Researcher, Resolution Foundation.

Outline of the report

In this report we examine the perceptions of employers, recruiters and workers of the rise of the so-called gig economy and the new ways of working it represents. To determine employer sentiment, the report will draw largely on the quantitative survey responses from both the YouGov senior decision-makers survey and the REC *JobsOutlook* survey conducted by ComRes. Findings will be compared and contrasted with qualitative data, arising in the main from structured interviews with representatives of digital work platforms, recruiters, industry experts and other external stakeholders. Quotes from the qualitative research and findings from the quantitative data are provided throughout the report and are attributed accordingly.

The report begins by defining the gig economy and its origins, and explaining how digital work platforms are changing the world of work as we know it. Data from both the YouGov and ComRes surveys show how we can expect the significance of digital work platforms to the UK labour market to grow in the future. The following sections of the report then set out the risks of the growing gig economy as perceived by employers, recruiters and independent workers alike. Qualitative insights from representatives of digital work platforms as well as industry experts aim to dispel the myths around the rise of gig working culture in the UK. The aim of these central sections is to delineate the real risks and opportunities for each of the stakeholder groups and provide a solid platform from which to make recommendations to government, employers, recruiters and candidates to help ensure that this way of working will be beneficial for the entire UK economy in the future.

**PEOPLE REFER
TO US AS THE
EBAY FOR JOBS.**

JOE GRISTON, FREELANCER.COM

03

**DEFINING THE
GIG ECONOMY**

The gig economy is growing. As it does so, so too does the confusion surrounding what it is and how it functions. This confusion has arguably been exacerbated by the abundance of terminology used to describe this new digital working environment, as well as the different types of online intermediaries used to facilitate it. This section, therefore, attempts to shed some necessary light on our new gig working world, providing key definitions as well as explanations as to what it is, how it works and where it's going.

What is the gig economy?

According to a 2014 Nesta-Collaborative Lab report, the gig economy is just one part of the wider collaborative economy that has emerged along with the advancement of technology. In short, the collaborative economy is all about enabling access to goods and services via decentralised networks, therefore challenging traditional ways of doing business. The renting, exchanging or leasing of goods and services between peoples are all activities that make up today's collaborative economy. The gig economy, by consequence, has arisen as an important subset within this wider collaborative space, facilitated in the main by the internet and the power of digital technologies to connect people with one another and to co-ordinate their activities swiftly and easily.¹⁰

Within the gig economy, digital work platforms – or online intermediaries – are used to provide access to flexible work opportunities. Digital work platforms can come in the form of errand-based marketplaces, such as TaskRabbit or Upwork, or they can link customers with a particular service need to independent workers, such as Freelancer.com or PeoplePerHour. What is common to all gig working platforms is that the economic 'transaction' – namely the buying and selling of goods and services for an agreed price and for a set period of time – takes place through the online intermediary.

The role of digital work platforms could be seen as linking workers to potential end users by performing a vital match-making function:

People refer to us as the eBay for jobs. We're a two-sided marketplace. As an employer you post work to the site, detailing your project, and then freelancers all around the world will bid on that piece of work. They'll state their charge and then you'll be able to see some very powerful stats on the freelancer, plus their ratings, reviews, qualifications and examples of previous work as well as a five-star rating system. Based on what they get, the employer picks someone to do that work. Seventy per cent of jobs posted get a bid within 60 seconds. It's very liquid – a very busy marketplace. Or we have our Contest platform where an employer will post a contest

¹⁰ Stokes, K., Clarence, E., Anderson L. and Rinne A. (2014) *Making sense of the UK collaborative economy*. London: Nesta-Collaborative Lab.

and pay an amount of money as the prize, such as a logo design, and then freelancers will submit their ideas and the employer awards the prize to their preferred entry.

Joe Griston, Freelancer.com

Stephane Kasriel, CEO of Upwork, also emphasises the match-making function of his online platform, as well as the diversity of its users:

Upwork is a freelancing website. Its aim is to make it easier to get work done – anytime, anywhere. That means we connect independent professionals and other small businesses on one side with clients on the other side.

We're heavily investing in data science. At any point in time, there are tens of thousands of jobs open on our site and millions of freelancers looking for jobs, and a big part of our role is to try to reduce friction in the process. We make it easier for the right freelancer to find the right jobs, decreasing the time they spend looking for work and increasing the time they spend doing paid work. That's really our main area of development right now – matching people even more efficiently and reducing the time-to-hire, which on average takes about three days. We're trying to get that down to minutes.

Stephane Kasriel, Upwork

WHAT THE GIG ECONOMY IS NOT

As previously mentioned, digital work platforms are websites that match companies or individual customers with freelance workers, who make themselves available to undertake specific assignments or tasks, at a particular time, or in a particular place. These digital marketplaces for services should not be confused with online jobs boards, such as Monster, which aggregate CVs with job postings from established companies to facilitate traditional 'employee–employer' relationships. Digital work platforms should also not be confused with professional social networking sites such as LinkedIn, which helps individuals to showcase their skills, employment history and availability to potential employers, and also provides people with information about other employment opportunities via its integrated jobs board. What social networking sites such as LinkedIn lack is the match-making function inherent to digital work platforms such as TaskRabbit, Upwork, PeoplePerHour and Freelancer.com.

So are we gigging, sharing or collaborating?

Arguably, because of the place of the gig economy within the wider collaborative economy, the terms are often used interchangeably, adding to the confusion as to what each concept means. Further complicating the area is the wealth of other terminology that has emerged to describe this new collaborative working space, such as the sharing economy or crowd-working. The following chart outlines just

some of the terms that are used interchangeably, across countries and across sectors, to describe this new phenomenon in our twenty-first-century labour market:



For the purpose of this report, the term 'gig economy' will be used consistently throughout for its clear connection to digital work platforms and the online talent marketplace.

How the gig economy began...

Although the ideas and the activities behind the wider collaborative economy are not new, the origins of the so-called gig economy can be traced back to the United States during the 2009 financial crisis, when people turned to gig working over the internet – often doing several, piecemeal jobs at a time – as a means of making ends meet.¹¹ Instead of fading away as the economy recovered, gig working can be

¹¹ Hook, L. (2015) Year in a word: gig economy. *Financial Times*. 29 December.

seen to have firmly taken hold in subsequent years, both in America and elsewhere in the world. A recent study by Harvard economist Lawrence Katz and Princeton's Alan B. Krueger found that the number of Americans with 'alternative work arrangements' rose by 9.4 million from February 2005 to November 2015. These include temporary agency workers, contract workers, independent contractors and freelancers.¹² A report by JP Morgan Chase & Co also found that over the three years between October 2012 and September 2015, 4.2% of adults in the USA – that's an estimated 10.3 million people – earned some kind of income via the gig economy. It found that the number of gig workers increased 47-fold over the three years, with the use of digital work platforms growing particularly rapidly. In 2013 and 2014, year-on-year growth rates in monthly participation on digital work platforms ranged from 300% to 440%. Earnings from these platforms also grew 54-fold over the same 36-month period.¹³

The gig economy in the UK

The gig economy has not just gained traction in the USA. Here in the UK, in 2014, a quarter of the population was found to have used digital technologies to access goods, services, money and knowledge from new people-powered networks and marketplaces.¹⁴ The Rt Hon Sajid Javid MP, former Secretary of State for Business, Innovation and Skills, has described the growth of the sharing economy in the UK as 'phenomenal'.¹⁵ A PWC report estimates that five components of the UK's sharing economy had a turnover of approximately £500 million in 2014 and goes on to predict that revenues from the sector could reach £9 billion a year by 2025.¹⁶

In terms of the numbers of British people using online platforms to find work, a survey by the University of Hertfordshire found that one in five (21%) respondents – equivalent to around 9 million people – have previously used online platforms to seek paid 'crowd work' or 'gigs'. Around nine in ten (91%) of the crowd-workers interviewed say they are mainly carrying out desk-based work for digital platforms such as Upwork, Clickworker or PeoplePerHour. A further 42% of respondents taking part in the survey – equivalent to more than 18.5 million people – say they have turned to such platforms to source taxi drivers, builders, graphic designers and even accountants,¹⁷ showing the gig economy is quickly becoming a vital component of the UK labour market for a wide range of sectors and industries.

12 Katz, L. and Krueger, A. (2016) *The rise and nature of alternative work arrangements in the United States, 1995–2015*. 29 March. Available at: http://scholar.harvard.edu/files/lkatz/files/katz_krueger_cws_v3.pdf [Accessed 13 July 2016].

13 JP Morgan Chase & Co. (2016) *Paychecks, payday, and the online platform economy: big data on income volatility*. Available at: www.jpmorganchase.com/corporate/institute/report-paychecks-paydays-and-the-online-platform-economy.htm [Accessed 13 July 2016].

14 Stokes et al. (2014).

15 Coyle, D. (2016) *The sharing economy in the UK*. Sharing Economy UK. Available at: www.sharingeconomyuk.com/perch/resources/210116thesharingeconomyintheuktpdc.docx1111.docx-2.pdf [Accessed 13 July 2016].

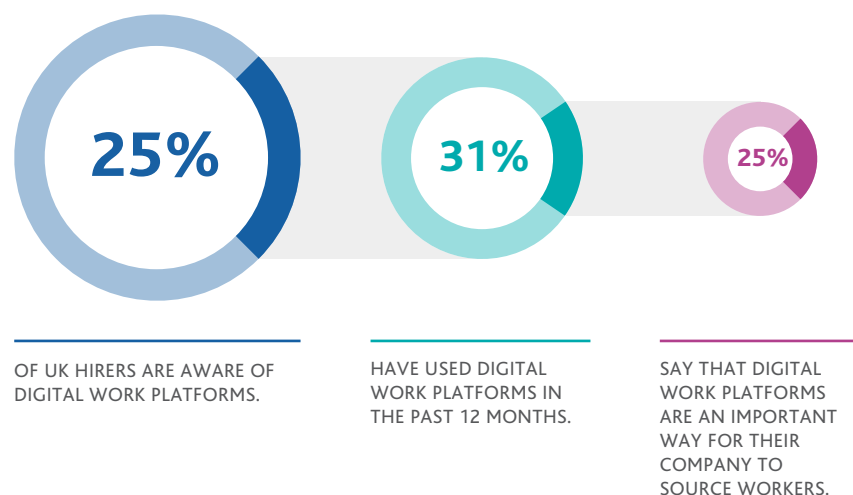
16 Blann, M., Powell, I. and Oldfield, R. (2015) *Five steps to success in the sharing economy*. PricewaterhouseCoopers. Available at: www.pwc.co.uk/issues/megatrends/collisions/sharingeconomy/five-steps-to-success-in-the-sharing-economy.html [Accessed 13 July 2016].

17 Huws, U. and Joyce, S. (2016) *Size of the UK's 'gig economy' revealed for the first time*, University of Hertfordshire crowd working survey. February. Available at: www.feeps-europe.eu/assets/a82bcd12-fb97-43a6-9346-24242695a183/crowd-working-survey.pdf [Accessed 13 July 2016].

According to data from the digital work platform PeoplePerHour, 69.3% of UK freelancers are based outside London, with the three most popular cities outside the capital being Manchester, Bristol and Birmingham. Data from the platform also shows the UK has experienced a 433% increase in its freelance population in the last three years, with the highest growth of freelancers occurring in York, Reading and Hull.¹⁸

Data from our own surveys also show the gig economy has already started to make notable headway with UK employers. A ComRes survey of 200 UK employers with hiring responsibilities shows a quarter (25%) of those surveyed have already heard of digital work platforms, with the greatest proportion of hirers who are aware of online talent marketplaces based in London. Of the 25% of UK hirers that are aware of digital work platforms, 31% say they have used them in the past 12 months and a quarter (25%) say that they are an important way for their company to source workers.

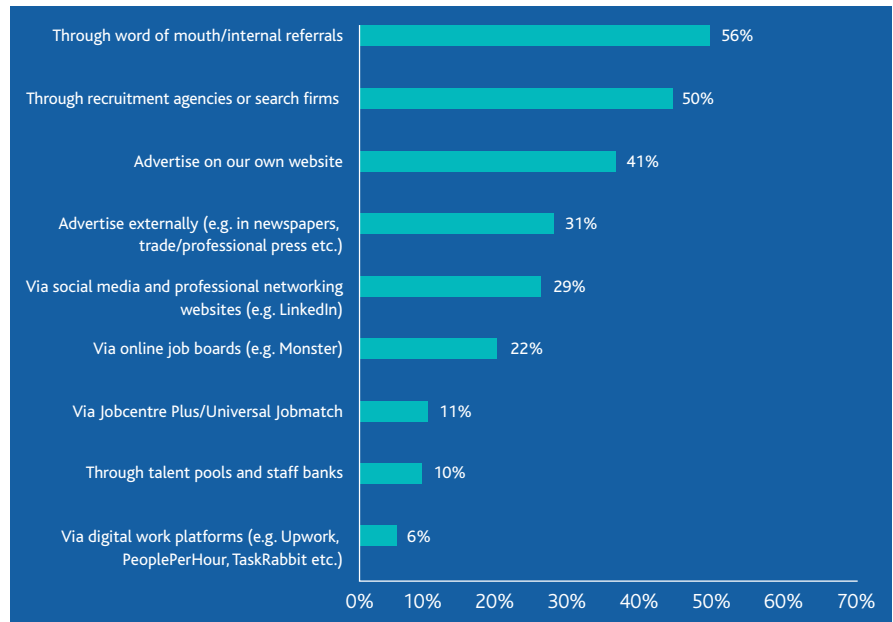
FIGURE 1 / UK EMPLOYERS' USAGE OF DIGITAL WORK PLATFORMS



Similarly, data from our YouGov survey of 614 GB business decision-makers reveal 6% of British businesses are using these platforms at present to recruit both permanent members of staff and temporary contract workers. Sourcing talent through word of mouth or via recruitment agencies is the most common recruitment channel for the majority of GB businesses.

¹⁸ PeoplePerHour. (2015) *The changing place of Britain's workforce*. Blog. Available at: <http://blog.peopleperhour.com/macroeconomic-reports/the-changing-place-of-britains-workforce> [Accessed 13 July 2016].

FIGURE 2 / THINKING ABOUT THE RECRUITMENT OF BOTH PERMANENT MEMBERS OF STAFF AND TEMPORARY CONTRACT WORKERS, IN WHICH, IF ANY, OF THE FOLLOWING WAYS DOES YOUR BUSINESS RECRUIT? (PLEASE SELECT ALL THAT APPLY)



Others (14%), Don't know (8%)

Where is the gig economy going?

When it comes to predicting the future, the truth is we just do not know how big the UK's gig economy will become. A study by software provider Intuit reveals that only 13% of British people believe they will be working in traditional '9–5' employment by 2025, suggesting that gig working could indeed become the way of the future.¹⁹ This prediction is also in line with current trends in the UK labour market. Recent data from the Office for National Statistics (ONS) shows that the number of self-employed people in the UK is on the rise, already totalling 4.7 million for February to April 2016, an increase of 209,000 on the previous year. This has led some financial commentators to suggest that the number of UK workers engaged in the gig economy could easily overtake the number of people working in the public sector before the end of the decade.²⁰ With digital work platform PeoplePerHour also forecasting that half the US and UK workforce will be working on a freelance basis by 2020,²¹ we certainly have strong grounds to start preparing now for the potential growth of the gig economy in the future.

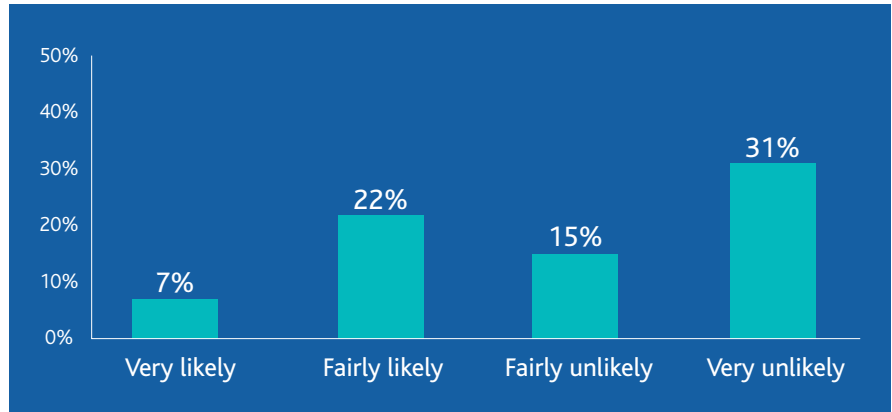
Our own research into the use of digital work platforms by employers also gives reason to believe the gig economy is no passing trend. Twenty-nine per cent of the 614 UK business decision-makers surveyed by YouGov say it is likely that digital work platforms will become more important to their businesses in the next five years.

19 Schram, B. (2015) Sharing economy: 87% of Brits see 'gig economy' taking over from 9–5 working days in 10 years. *International Business Times*, 15 September.

20 Lynn, M. (2016) The self-employed will overtake the public sector with the 'gig economy'. *Telegraph*, 18 January.

21 PeoplePerHour (2015).

FIGURE 3 / HAVING CONSIDERED DIGITAL WORK PLATFORMS, HOW LIKELY OR UNLIKELY DO YOU THINK IT IS THAT DIGITAL WORK PLATFORMS WOULD HAVE BECOME MORE IMPORTANT TO YOUR BUSINESS IN 5 YEARS' TIME (I.E. IN 2021), COMPARED TO NOW?

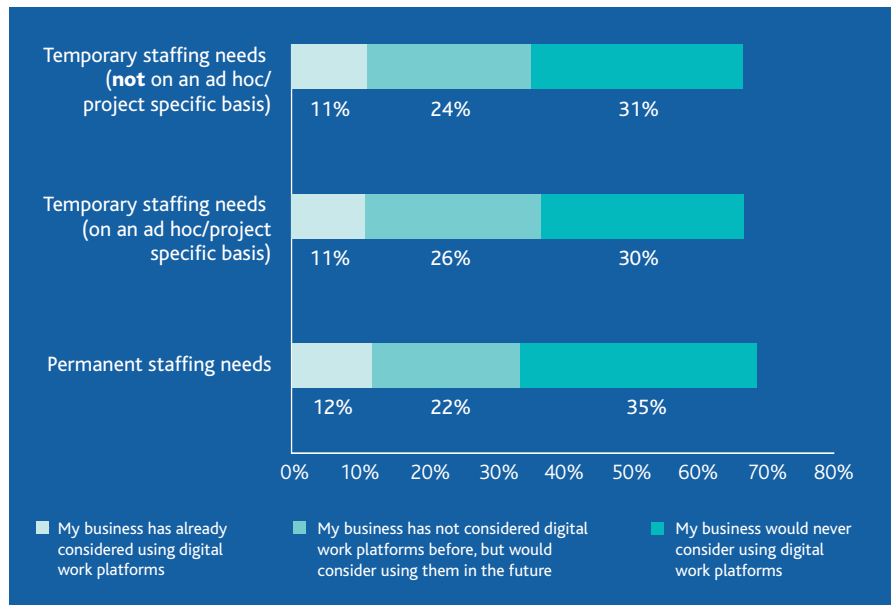


Don't know (24%)

Interestingly, almost half (49%) of the under-35-year-olds surveyed said it was likely that the importance of digital work platforms to their businesses would increase in the next five years, as opposed to only 17% of those business decision-makers aged over 55. This suggests that when it comes to increasing the use of digital technologies to engage workers in UK businesses in the future, as time goes on and younger decision-makers come in, gig workers may well become a more prominent feature of company workforces. It is also interesting to note that a third (35%) of decision-makers from companies that predominantly work in London feel it is likely that digital work platforms would become more important to their businesses in the next five years.

Twenty-six per cent of business decision-makers are yet to consider digital work platforms for temporary staffing needs (on an ad hoc or project-specific basis), but say they would consider using them in the future.

FIGURE 4 / THINKING ABOUT USING DIGITAL WORK PLATFORMS (E.G. UPWORK, TASKRABBIT) TO SOURCE TALENT FOR YOUR BUSINESS, WHICH ONE STATEMENT BEST APPLIES FOR EACH OF THE FOLLOWING STAFFING NEEDS?



Don't know (34%, 33% and 32% respectively)



23%

OF EMPLOYERS SURVEYED SAY THEY WOULD USE DIGITAL WORK PLATFORMS IN THE FUTURE TO SOURCE WORKERS FOR THEIR COMPANY.

The age and revenue of a company is shown to boost the likelihood of their use of online staffing marketplaces. Thirty-two per cent of the companies aged between 10 and 20 years are considering using digital work platforms for future temporary staffing needs (ad hoc or project specific), and a further 30% of companies aged between 20 and 25 years. Thirty-five per cent of companies who have an annual turnover of between £1 million and £9.9 million are considering using digital work platforms, compared with only 24% of companies whose annual turnover is less than £1 million, suggesting that a strong financial base is conducive to experimenting with alternative hiring strategies.

Similar results were also found by the question we posed to a sample of 200 UK hirers. Twenty-three per cent of the employers surveyed say they would use digital work platforms in the future to source workers for their company.

Moreover, anecdotal evidence from our qualitative research suggests that industry experts believe the gig economy is only going to get bigger in the UK in the future. Below is a list of answers given by respondents when asked where they see the gig economy going in the next few years:

The gig economy is part of how the world of work is shifting. It's a pattern of work that's enabled by technology and it's a highly efficient way of bringing in labour and assets in completely new forms. It's economically inevitable that it will be part and parcel of how the future economy functions.

Rt Hon Liam Byrne MP

We know the world of work is changing. We don't know yet what jobs are going to be created in five or ten years' time, but I think we're already on this journey and we've got to adapt to a more flexible future workplace. I would say the gig economy has huge value for people, and if everyone goes into it with our eyes open it can work very well.

Emma Stewart, Timewise

What we're witnessing now is a structural change in the way our labour market works, in so far as more jobs are now coming from gig-economy platforms, and this will only increase – but from a very small level – in the years ahead. This is, in part, because consumers benefit from the innovation associated with the gig economy (and so demand it). Smartphones are only going to get smarter (and better at being managers). People's ability to create, and source funding for, useful platforms will only increase. So I think that while it currently accounts for a minority of employment and we shouldn't necessarily expect it to take over, the gig economy is here to stay.

Daniel Tomlinson, Resolution Foundation

The gig economy is definitely growing right now. There's a huge number of changes happening in society, in technology and in the types of jobs that are needed in the market. At the same time, the traditional '9–5' job

is a less compelling than it used to be, while being independent is a lot more compelling than it used to be.

Stephane Kasriel, Upwork

The gig economy is small but growing. Clearly, interest in these roles is on the increase. They appeal to workers who would like to work part time around other responsibilities, or as a supplement to their regular full-time job. In some cases, workers are trading in the regular 9-to-5 altogether and working a gig job full time on their own schedule.

Mariano Mamertino, Indeed

The gig economy is the future of work. There's no shadow of a doubt about that. Look at it this way: my granddad worked for one company for 50 years and got a gold watch on retirement and a pat on the back. That was the usual way you worked back then. My father, by contrast, worked in five or six jobs in ten-year stints, and I have worked for three to four years in each job. As you go down the generations, the amount of time working gets shorter and shorter. The days of being average are over. Work platforms like Freelancer.com are best placed to facilitate this. We allow anyone with an internet connection anywhere the chance to earn money.

Joe Griston, Freelancer.com

With the growth of the gig economy in the UK widely foreseen by employers and industry experts alike, the following sections of this report will examine the risks and opportunities it brings to three main stakeholder groups – namely employers, recruiters and candidates – before making some recommendations that could see the gig economy successfully rolled out in the future for the benefit of British society as a whole.

**THE PROBLEM IS
THAT SOME END
CLIENTS DO NOT
REALISE THAT HIRING
AN AMATEUR IS
A DAMN-SIGHT
MORE EXPENSIVE
THAN HIRING A
PROFESSIONAL.**

CHRIS BRYCE, IPSE

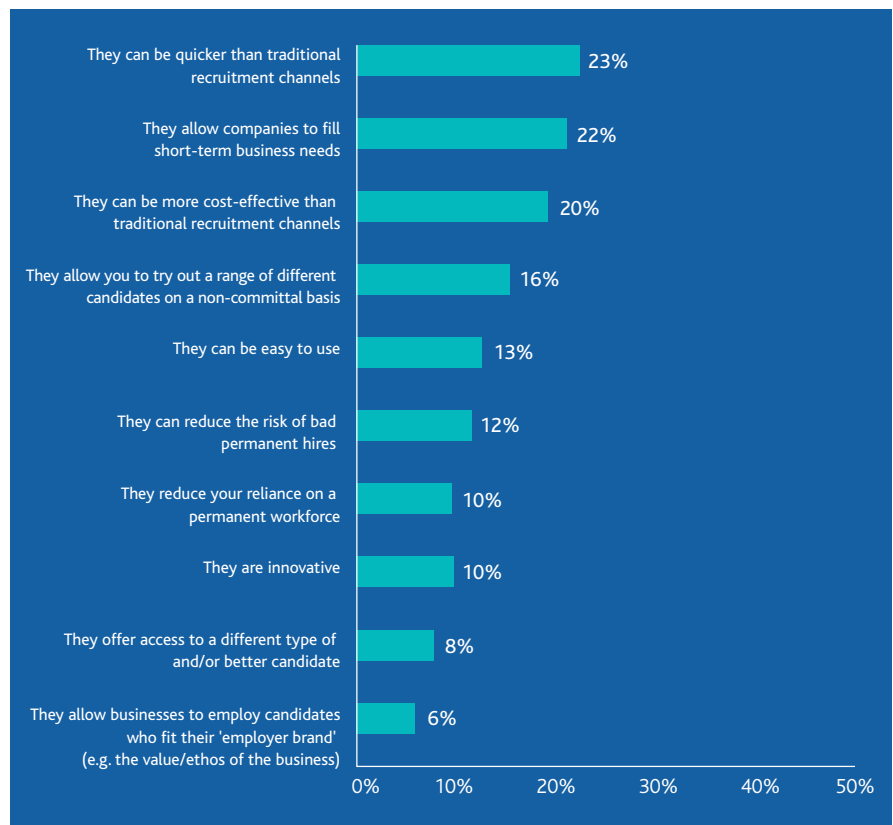
04

**WHAT IS THE IMPACT
FOR EMPLOYERS?**

While much of the existing literature around the gig economy concentrates on looking at who gig workers are, what industries they work in and why they choose to work this way, very little attention has been paid to the end-users of gig services: employers and British businesses. This section of the report reveals employers' sentiments regarding the rise of the gig economy in the UK and goes some way towards identifying the key concerns that will need to be addressed before employer engagement in the gig economy can be increased and UK businesses can fully capitalise on the opportunities it affords.

It can be claimed that the rise of the gig economy is beneficial to British businesses. A survey of 614 business decision-makers conducted for us by YouGov shows that 23% of respondents recognise that digital work platforms can be quicker than traditional recruitment channels. Twenty-two per cent realise that digital work platforms allow companies to fill short-term business needs and 20% think they can be more cost-effective than traditional recruitment channels. Other benefits include the fact that they allow employers to try out a range of different candidates on a non-committal basis (16%) and they reduce the risk of bad permanent hires (12%).

FIGURE 5 / IN GENERAL WHICH, IF ANY, OF THE FOLLOWING DO YOU THINK ARE THE BENEFITS TO BUSINESSES IN USING DIGITAL WORK PLATFORMS TO RECRUIT WORKERS?



Not applicable – I don't think there are any benefits to businesses of using digital work platforms (23%), Don't know (28%), Other (1%)

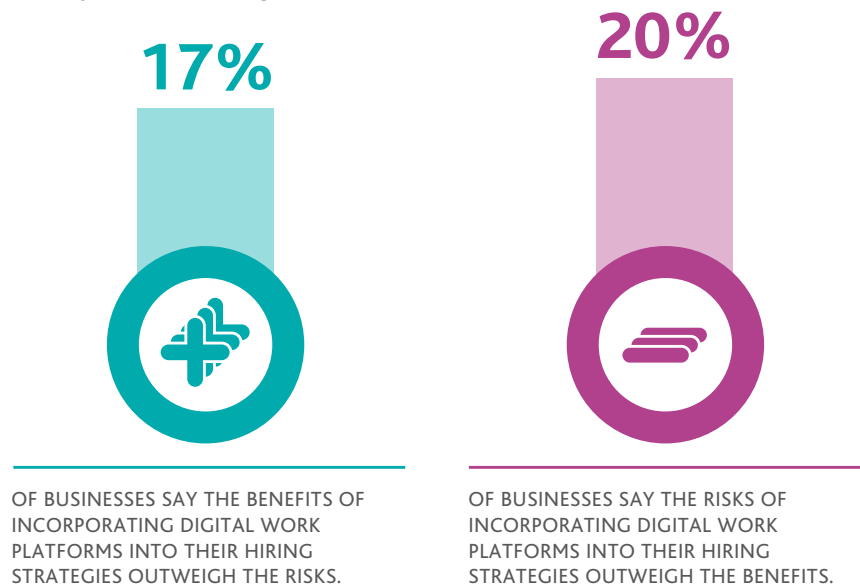
OPPORTUNITIES FOR EMPLOYERS: AN OVERVIEW

The gig economy enables employers to:

- source talent from the global marketplace
- source talent more quickly than via traditional recruitment channels
- source talent more cheaply
- bring in talent on a project-by-project or non-committal basis
- avoid the cost of unnecessary long-term or permanent hires
- reduce the risk of unsuitable long-term or permanent hires
- experiment with a wide range of different service providers.

Nevertheless, evidence from our YouGov survey shows that employers are relatively split down the middle as to whether they think the use of digital work platforms in formal hiring strategies brings more benefits than it does risks. In fact, one in five (20%) decision-makers perceive the use of online talent marketplaces as being more risky than beneficial for their businesses. An even greater proportion remain neutral, leaning towards neither benefits nor risks being greater (35%), or are undecided (28%) about the impact of the gig economy on their staffing structures.

FIGURE 6 / WHICH ONE, IF EITHER, OF THE FOLLOWING STATEMENTS BEST DESCRIBES YOUR BUSINESS' ATTITUDE TO DIGITAL WORK PLATFORMS?



Don't know (28%), Other (1%)

The findings from our sample show that more needs to be done to delve into employers' concerns surrounding the use of gig workers in their businesses. When asked about employers' reluctance to use digital work platforms as part of their formal hiring strategies, the CEO of Upwork, Stephane Kasriel, says:

I think it's natural for hirers to be wary at first because they are sensitive to change. Finding workers in this way is new – it hasn't been done forever. What we find, particularly among larger clients, is that change usually starts as

a grassroots-type of effort led by somebody who may be newer to the firm or more junior and 'gets it', before it goes all the way to the top and reaches people who have been operating in a certain way for 20, 30 or 40 years and therefore may not initially see the opportunity in operating differently.

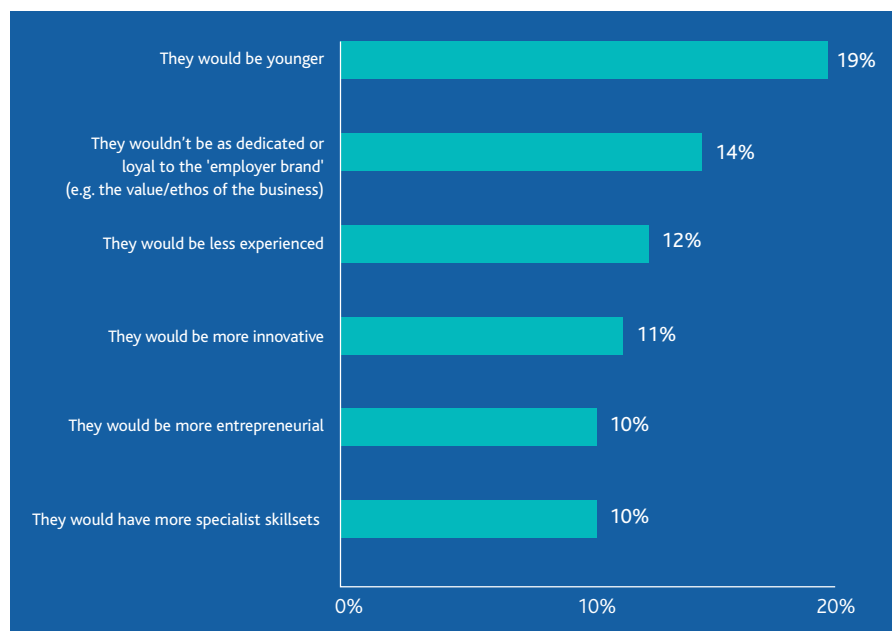
Stephane Kasriel, Upwork

In order to help the UK business community make an informed decision about the impact of the gig economy on their companies, the following analysis qualifies some of the concerns that using gig workers represents for British businesses and highlights some of the opportunities that are to be had by using these non-conventional hiring strategies.

Concern 1: Ensuring employers get access to high-quality talent

Our research into employer sentiment reveals that British businesses are concerned about the quality of the candidates that digital work platforms provide access to. Business decision-makers surveyed by YouGov believe that candidates sourced via online talent marketplaces wouldn't be as dedicated to the 'employer brand' (14%) and would be less experienced (12%) – features that could arguably imply a lower quality of output. One in five (19%) business decision-makers also perceive candidates would be younger, which does not necessarily negate high-quality talent but certainly feeds in to employers' perceptions.

FIGURE 7 / AS A BUSINESS, IN WHICH, IF ANY, OF THE FOLLOWING WAYS WOULD YOU EXPECT THE MAJORITY OF CANDIDATES AVAILABLE THROUGH DIGITAL WORK PLATFORMS TO BE DIFFERENT TO CANDIDATES AVAILABLE THROUGH MORE TRADITIONAL RECRUITMENT CHANNELS?



Not applicable – I don't think there are any benefits to businesses of using digital work platforms (31%), Don't know (26%), Other (3%)

You get what you pay for

Our discussions with industry experts reveal that UK employers' preconception of gig workers being low-quality workers could, in part, be related to the way digital work platforms function – relying largely on the candidates themselves to set their rates and determine their conditions of work. Young people such as students looking to make some money on the side or people living in the developing world may be more willing to work for a lower hourly rate than more established professionals, thus blurring the lines between pricing structures and quality. As a result, employers attracted by the prospect of sourcing staff on these platforms for a below-the-market rate may well find they are not getting the level or quality of service they expected from their chosen worker. CEO of IPSE Chris Bryce explains:

One of the risks of the gig economy is the driving down of rates. It becomes a commodity exercise. The problem is that some end clients do not realise that hiring an amateur is a damn-sight more expensive than hiring a professional. The rates on these platforms have been driven down by the commoditisation of the market and it's perfectly feasible, especially in our online world, that work can be carried out by people outside the United Kingdom. So what you have is a lower cost-base of younger, relatively inexperienced people who are much more prepared to work for literally pocket money than somebody who has been doing a trade for 20 years.

Chris Bryce, IPSE

When using digital work platforms to source workers, then, employers need to be aware that making the price of a worker a key selection criterion may not necessarily be the best way to ensure the quality of the talent they need. Employers would do well to acknowledge that in the world of online talent marketplaces, the rate of a freelancer is usually a good determinant of their ability, experience and quality. Outlining the risks of being led by price, Chris Bryce says:

In a way, I think the end-users of gig workers are falling into the trap of expecting high-quality services for not a lot of money, but that will rebalance when they find out, as is the case, that somebody asking for £40 or £50 an hour probably is five or ten times better than someone asking for £10 an hour. A higher price generally means they're quicker, and more accurate, and the work is of high quality. The market will have to adjust very quickly to that concept.

Chris Bryce, IPSE

Our discussions with representatives of gig working platforms consequently reveal that users of online talent marketplaces are already adjusting to this idea. Data collected by Freelancer.com reveals that nearly half of employers tend to contract workers on digital work platforms for an average or even a higher-than-average price, dispelling the myth that the lowest-priced worker always 'gets the gig':



47%

OF ALL PIECES OF
WORK ON FREELANCER.
COM ARE AWARDED
TO THE AVERAGE OR
HIGHER BIDDER.

A common misconception of us is that people just use the lowest bidder. That's not the case at all. Around 47% of all pieces of work are awarded to the average or higher bidder as far as value is concerned. As more people are getting used to working in this way, it's really becoming a place that's incredibly trusted for quality as well, and I think that might have been an issue previously when people didn't really understand how sites like ours worked.

Joe Griston, Freelancer.com

The fact that employers are not always opting for the lowest-priced worker also supports the idea that employers recognise they are getting much wider access to talent and resources with the opportunities the gig economy provides. The possibility to get work for a lower price may well be an advantage, but it is not the key determining factor in an employer's hiring decision.

Rating systems

To help employers determine the best quality of worker for their needs, the owners of digital work platforms have also developed their own online ratings systems to direct users away from price and to encourage them to focus, instead, on the qualifications, experience and previous work of the freelancers listed on their sites. This is a good thing as far as employers are concerned, as it enables them to quality-check candidates quickly and easily all in the one place. This can be particularly beneficial for small businesses who, perhaps, have more flexibility in choosing their staff:

The gig economy gives employers ready access to people who are available to work and whose work they can check through a portfolio. Quite a lot of these platforms have testimonials on them or genuinely, in the case of creative media, portfolios that you can look at. So it gives employers that speed of access and breadth of access. And it probably works really well for SMEs rather than the larger end-users, who have stricter on-boarding requirements.

Chris Bryce, IPSE

As an employer, some of these platforms allow you to rate your experience with the candidate, commenting on the delivery of their work. In a similar way to review sites this gives you some reassurances about entering into future contractual relationships.

Simon Conington, BPS World

Describing the ratings systems featured on their sites, the representatives of digital work platforms we spoke to explained that they are predominantly a tool to enable gig workers to effectively manage their relationships with their clients. It is through the ratings tools that clients are able to check a range of qualities about a worker – from previous reviews of their work through to average completion times – thereby better enabling them to make an informed hiring decision. In many

ways this can be seen as more reliable than a worker simply presenting a potential employer with a copy of their CV, as trust is firmly embedded in the process and the system of 'checks and balances' provided by the ratings systems adds testimony to the worker's claims:

Upwork is a marketplace, so the work gets done through our platform and the communication happens through our platform, including invoicing and payment as well as feedback. At the end of every engagement, the freelancer rates their client and the client rates their freelancer. In turn, those ratings are visible on profiles, so before a client engages a freelancer, they can see all of the feedback previous clients have left about the freelancer.

Stephane Kasriel, Upwork

The five-star rating system we use is so simple but very powerful. Everyone can rate the people they use and the people they work for, too. It works both ways. If you go onto our platform now and browse freelancers' profile, you'll see we've got some very specific attributes on everyone's profiles, such as the percentage of work this person has completed on time; the percentage of work this person has completed within budget; also the percentage of rehire rate – the amount of times that person has been rehired by the same employer, which is a sign of good quality. You can also see previous examples of work and you can see previous reviews from people they've worked for. Our match-making services are based on recent reviews and recent work, not stuff that's happened five years ago because maybe that person is doing something else now. All of this means you can really trust that person to do the work.

Joe Griston, Freelancer.com

A big source of friction historically has been trust. Why do companies interview 20 candidates and then take each of them through rounds and rounds of interviews? It's because people don't trust each other, and that's because you don't have really good signals to help determine whether you can trust someone. A résumé is potentially a set of lies. References may be overly friendly because no one gives references for people that didn't like them. The only way to really vet talent is to spend a huge amount of time assessing them yourself. When you build a platform like Upwork, however, trust is embedded because you can see every single project that that freelancer has done through the website and the ratings they got for that work. As a result, you as a client feel a lot more reassured that this person is who he or she claims to be and is capable of doing what he or she claims to be capable of doing.

Stephane Kasriel, Upwork

Other compliance tools

Our discussions with representatives of digital work platforms also revealed that online talent marketplaces are investing in new technologies to better

facilitate an honest 'employer–contractor' match. As well as online rating systems, Freelancer.com has developed an automatic recommendation system, which uses a worker's metadata to match them instantly with a potential employer. It is also attempting to facilitate more interaction between employers and contractors via a range of internet communication tools. Similarly, Upwork is developing a 'work enterprise' that allows the site to micro-manage larger employers' relationships with their gig workers:

As we've gone a bit further in our life cycle, we've got quite a lot of match-making that goes on on the site as well. So you're posting a project and we're recommending the best people to complete that work for you. That's actually quite a powerful thing – a lot of people are liking it at the moment. That then gets freelancers trying to get the best reviews to up their ratings so they can get selected by our recommendation tool and matched for those jobs.

Joe Griston, Freelancer.com

One of the big changes we're investing in is 'Upwork Enterprise' – the product we offer to large corporations. Upwork Enterprise delivers as much of the value of traditional contracts as possible to enterprises while meeting their demands in terms of classification compliance, information security and programme management. It enables enterprise clients to better manage risk for the various functions of their business – particularly in procurement, legal and HR.

Stephane Kasriel, Upwork

We have a very powerful messaging service, so you're constantly in communication with the freelancers. We've got video chat on there now as well. So it is not too dissimilar to the idea of a dating agency in how it works, but essentially we're doing all we can to facilitate strong professional relationships.

Joe Griston, Freelancer.com

Concern 2: Ensuring workers are loyal to the work in hand

Our survey results show that UK employers are concerned that gig workers won't be as connected to the employer brand as workers sourced through more traditional channels, thus potentially reducing their investment in the work in hand and lowering the quality of their outputs. Our discussions with industry experts reveal that without a formal connection between the employer and the worker, the gig economy does not provide for the type of working relationships more customary in successful businesses. Gig working risks breaking traditional bonds of duty and care from an employer to a worker. In some respects, the gig economy

may be seen to represent the 'individualisation' of work, lacking the benefits that come with a sense of workforce cohesion:

You could argue that when people are on your books, you're not just able to convey tasks much more easily – for example how you would like your website designed – you're also possibly likely to get more worker 'buy-in' to your business. People might put the extra mile in if they're on your books and you see them day in day out, rather than someone you're just giving tasks to, who lives half way round the world. Engaging workers online is potentially more transactional.

Benedict Dellot, RSA

The gig economy is part of the story of the individualisation of work. Many of the workers in these jobs don't know who their 'colleagues' are, if they even have any. In a traditional office job, you know the people doing similar work to you, you have an understanding of how you're paid differently, the hours you work and how you're treated by your bosses. But if you are getting work through an app you lack this information, which makes it more difficult to communicate and organise in the same way.

Daniel Tomlinson, Resolution Foundation

Reputational issues

When sourcing workers online for short-term projects, then, it is still important for employers to think about the long-term effects of using such hiring strategies. As our discussions with industry experts revealed, using gig workers may actually be a hindrance to building up a firm sense of corporate identity or, in extreme cases, can even raise reputational questions as to the ethics and integrity of a company:

Continuity matters in organisations. For the development of ideas and identity, you can't have identity and build up knowledge and expertise in a certain area if all your staff are only coming in and out for temporary projects. Also, in terms of reputation, there's a danger that organisations become known as cheap operators, so I think there's a real reputational issue here as well as a general efficiency and effectiveness one.

Benedict Dellot, RSA

Small business boosts

Our discussions with industry experts revealed that the way the gig economy will impact employers depends largely on the size or scale of a company. The general consensus is that sourcing workers from digital work platforms may be more appropriate for smaller businesses and start-ups because, at the end of the day, they are less concerned with long-term ambitions and can use gig workers to boost the business and its work as and when needed.

As a rule of thumb, for one-person businesses it often makes a lot of sense to put tasks out on these platforms, but I think larger businesses find it makes more sense to employ someone in-house. It all depends on the predictability of tasks in the business. If you're in a firm where clients are highly variable and trade ebbs and flows, digital work platforms are good for you, but if you have a business where it's quite steady and you're on a general upward trajectory, I think harnessing talent in a usual manner is perhaps more effective.

Benedict Dellot, RSA

In the temping market, for administration and jobs requiring relatively low skills, or easy-to-buy skills, gig working works brilliantly. Equally, if you're well connected, highly skilled capability can be supplied this way. For example, I'm setting up a business and the old model would have been to hire a team of delivery consultants and assessors (occupational psychologists), whereas we have a team of around 30 experienced associates: researchers, delivery consultants and assessors that we select for their experience. My assessors are in New Zealand. That doesn't matter to me – they're still working for us representing our brand. We mobilise them quickly when we need them. So you could say that our business model is utilising the gig economy.

Simon Drake, Exact Expertise

The representatives of digital work platforms we spoke to agreed that online talent marketplaces are particularly beneficial to smaller UK companies. As they describe it, they allow small businesses opportunities to save on the cost of hiring, as well as on hourly rates, and they also speed up the hiring process. For small businesses with a global focus, they allow companies an inroad to talent in other countries, without them having to invest time and effort to work with 'resourcers' on the ground in those regions.

One of the main reasons small businesses use Upwork is to source talent is because it can be hard to find people locally. Businesses have a lot of pressure to get work done, and one way to get work done faster is to fill jobs faster. On our site, jobs get filled in three days on average. You can be in a place in the world where there is no local talent, or even based in London and workers are available locally but the labour market is so competitive that you just don't find any of them want to work for you. It can be really, really hard to hire and that's why small business owners opt to go through us.

Another reason they turn to us is the global nature of our marketplace. Let's say you're a small business based in the UK, and you're trying to launch in France, Germany, Brazil and China. That isn't that easy to do in the traditional way, and you would probably have to travel a lot and find local consultants to help you get started. With Upwork, you can engage with freelancers in any one of those countries and get the business started.

Stephane Kasriel, Upwork

We're very highly used, from a business point of view, by small businesses initially. So for a small business, an entrepreneur, an independent business owner, it's a great way for them to get work done in quite an easy way. Let's say you're a small business – a coffee shop owner – that's just started up in the UK. You'd love your website designed, a really good logo made, or maybe you want to sell some coffee beans online. If you use local creative agencies to do that, they might charge £30–40k because it's supply and demand and that's what their other clients are willing to pay. As an independent business you might not have those funds and therefore the work isn't completed. With Freelancer.com you can get the work done potentially for a fraction of the price. In this way it's actually creating commerce.

Joe Griston, Freelancer.com

Help for big business

The gig economy does not just hold benefits for smaller employers. Larger companies could aid the growth of the gig economy. However, the bigger a company is, the more they might stand to lose when grappling with the types of compliance risks that the use of digital work platforms currently holds. REC CEO Kevin Green suggests:

I think when big companies try to use digital work platforms, providing they go through the compliance regime rigorously, it might be something that they find they can adopt quite quickly once they feel secure and they've managed the risks. First they need to make sure they've thought about all the risks and found a way through it – only then you might get scale.

Kevin Green, REC

Another factor adding to larger employers' reluctance to source workers through digital work platforms could be the new structures and workflows it requires to manage the system. The loss of ownership of the business leader over hiring decisions is something that larger companies need to adapt to:

Using gig workers requires a different skillset from the business owner or project manager from when he or she is managing a consultancy or an outside company. This is because he or she has less control.

Les Berridge, Networkers International

Our discussions with representatives of digital work platforms show that some larger companies have already started to grapple with these types of issues and are, in fact, actively sourcing workers through online talent marketplaces. Our conversations show that digital work platforms may allow bigger companies to supplement their existing labour contracts. For example, larger companies can outsource more of their creative work so they can get this type of work done faster and for a better price, while still relying on existing business partnerships to uphold the business-critical elements of their work. Online competitions on sites such as

Freelancer.com also allow large organisations the chance to access some of the best and most innovative ideas and buy these into their company accordingly on a case-by-case basis:

Let's think about bigger corporates. If you think of it in a simple way, I work for a big business and I use the site all the time. For example, I have to give presentations, both internally and externally. The content side, I know really well, but the slides look terrible if I do them. I can write the content in 10 minutes, but then I'd spend two hours trying to get the animations right, because I'm not really skilled at that. I've found freelancers on the site who I work with all the time for these kinds of things. I literally contact them, give them my presentation, and half an hour later an amazingly slick and awesome looking slide-set comes back. That helps me do my business well.

Joe Griston, Freelancer.com

Looking further at our enterprise clients, often what they're doing is not using Upwork as another way of hiring people; instead, they're using Upwork as a way to replace vendors that they've been working with, or at least parts of the relationships they've had with vendors in the past.

One example is large consumer packaged goods (CPG) companies that are working with Upwork. Many are progressively using us instead of a traditional marketing agency to do a lot of their creative and content marketing work. The idea is that it is more effective to work with your marketing agency for the strategic, brand-type of work, where it's easier to go with lots of experience in this and, frankly, you need your boss to feel good that you hired a marketing agency. But thinking ahead – when it comes to the execution of the thousands and thousands of media items, pictures, blog posts and data sheets, larger enterprises have come to realise that working with a traditional marketing agency is both extremely slow and very expensive, whereas in the future it will be possible to work directly with freelancers on Upwork, which will get results much faster.

Stephane Kasriel, Upwork

I think recently bigger organisations have cottoned on to the gig economy. Corporates have got involved with us seeing how it works, right up to NASA. NASA is an organisation for which it's very expensive to do the type of work that they do. Space exploration isn't cheap. So they find they can get a different group of people through our online 'contests', initially to help solve problems that astronauts face on an international space station. This is obviously great for enhancing the opportunities of freelancers too. There were a couple of guys in Eastern Europe who got on the site and ended up winning one of these NASA contests. Now they've done work for NASA through us – something I'm sure they never dreamed possible!

Joe Griston, Freelancer.com

Concern 3: Ensuring employers are protected

Although most of the debate surrounding the gig economy focuses on workers' rights and the lack of regulation currently protecting gig workers, it is also important to remember that employers want to be protected too. This might involve changes to the UK employment law landscape in order for employers to feel truly comfortable with using the gig working space. Employers are predominantly concerned about how they are engaging with people and on what terms. They need clarity on how gig workers are being engaged and protected within the UK labour market.

Our conversations with representatives of digital work platforms reveal that owners of online talent marketplaces have already been making headway in this area – particularly with regard to protecting employers' payments in the event of poor workmanship or 'no show' workers. One such example includes a 'contest' system devised by Freelancer.com that works on a competition basis, where candidates are invited to submit entries to an employer's call for submissions and the winner then receives the reward. The site also acts as the intermediary in the process, holding the money until the employer has chosen the work they prefer:

Contests are very well aligned with creative work. So, you might have a small business needing someone to design their logo, and then people will design that logo for you and we hold that amount of money in escrow. So let's say you need someone to do that and you'll pay them £300. We take that money from you and that £300 is then awarded to the person who's done the best work – essentially the person the employer wants to choose. So, that way, you're seeing the work beforehand.

Joe Griston, Freelancer.com

Another system employed by Freelancer.com is a 'milestone payment system', which distributes payment to the worker in agreed instalments, thereby offering the end-user assurances that the task is being completed on time and to a high standard. This method of payment can be seen to be particularly useful for expensive or long-term labour assignments. However, we should acknowledge that having to work before getting paid could be particularly onerous for many workers. It is nonetheless an accepted practice in the creative industries.

Trust, safety and confidence when using our platform is paramount to us – from both sides, for both the employers and freelancers. There are many ways that we ensure that trust. For one, we recommend that everyone uses something that we call our 'milestone payment system'. So rather than you get someone to do work for you – they go away for a month and complete that work and then you see the finished result and pay them – you split that work down into a series of milestones. So if you split it into five milestones, for example, when a fifth of the work is completed, you see that work, you're

happy with it, you release a fifth of the money. So that ensures you know exactly what work is happening and the quality of the person you're using.
Joe Griston, Freelancer.com

Digital work platform Upwork also prides itself on the payment protections it has put in place. In this system, the platform holds a deposit from the employer until the work is completed as a guarantee for both the client and the worker:

The way Upwork works is, as soon as the two parties agree on working together, the client puts a deposit in escrow. Only when the two parties agree that the worker has delivered on the job does the full exchange of work product for money happen. That's designed to protect both the client and the freelancer.
Stephane Kasriel, Upwork

SUMMARY: THE IMPACT OF THE GIG ECONOMY FOR EMPLOYERS

As our discussions have shown, the advent of the gig economy brings a range of opportunities for UK employers. These include the opportunity to:

- reduce operational costs
- get necessary work done quickly
- access global talent pools
- speed up traditional recruitment processes
- develop a more flexible workforce to meet business ebbs and flows
- reduce the risk of unnecessary or unsuitable long-term hires.

Employers are nevertheless concerned about a number of challenges posed by the use of digital work platforms. These include the risk of:

- choosing somebody who is not as qualified or experienced as they claim to be
- losing workers' loyalty to the employer brand
- paying money for poor quality or incomplete assignments
- becoming embroiled in potential disputes about their responsibility as an employer to the gig workers they use, as the legal and regulatory requirements in this area remain hazy
- becoming known as an employer who operates cheaply and gaining a poor reputation.

Our conversations have revealed that gig working platforms are making efforts to address some of these challenges. These include:

- developing online ratings and review systems to enhance trust and transparency
- offering different types of 'hiring' approaches, including competitions and contests, which allow employers to 'try out' or see a candidate's work first
- offering payment guarantees, either by holding the employer's money until the work is complete or releasing it in agreed instalments for larger projects
- facilitating conversations between employers and candidates via online messaging and video services so employers can be sure gig workers understand the task in hand
- providing dedicated dispute teams to reconcile any issues that may arise.

**EACH PLATFORM
AND TECHNOLOGY
HAS ONLY SOUGHT
TO ACCELERATE
WHAT WE DO –
NOT HINDER IT.**

SIMON CONINGTON, BPS WORLD

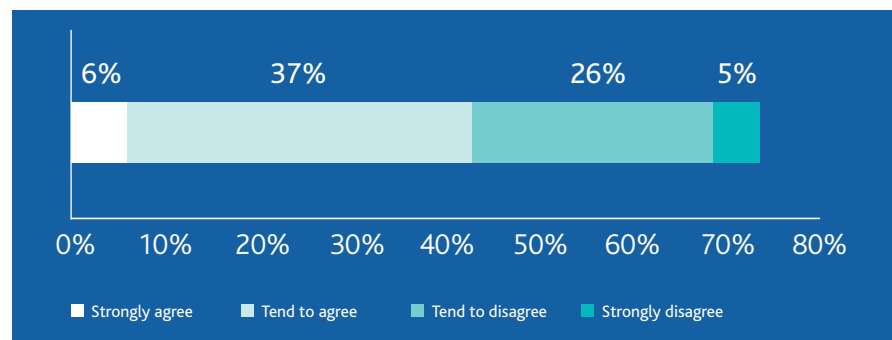
05

**WHAT IS THE IMPACT
FOR RECRUITERS?**

As the previous section of this report has suggested, the gig economy is changing the traditional nature of 'employer' and 'worker' relationships. Many have speculated that this may have potential ramifications for the wider UK recruitment industry, either by negating the need for an intermediary or, at the very least, offering a new means of sourcing talent. This section of the report, therefore, examines the impact of digital work platforms on the role of recruiters, before making some informed recommendations as to how the industry could adapt in the future to accommodate the gig economy and to harness the possibilities that this new way of recruiting talent is bringing about.

Evidence from our own surveys of the British business landscape shows that sourcing workers via recruitment agencies remains one of the most popular channels for British employers (50%). Our survey of 614 business decision-makers nevertheless shows that 42% of employers think that the rise of digital work platforms will reduce the need for professional recruiters in the future:

FIGURE 8 / THE RISE OF DIGITAL WORK PLATFORMS WILL REDUCE THE NEED FOR PROFESSIONAL RECRUITERS.



Don't know (27%)

With data showing that employers' use of digital work channels to engage candidates is likely to increase in the future, it is time that recruiters start to think about the potential impact this may have on the wider UK recruitment industry now. Discussions with recruitment leaders reveal that this potential impact does not necessarily have to be a negative one:

For recruiters the gig economy could be an opportunity. The question is what kind of opportunity. Does this give them a new platform to find workers, to find candidates, for the roles that they have available? Is it an extension of what they do with job boards and job sites? Is it a new model of LinkedIn? And if so, does it give them a LinkedIn for freelancers, or a job board or job site where they can access skills and capabilities in a new way? I think it gives them that.

Kevin Green, REC

Employers still have to find competent people, and funnily enough that's what we do as recruiters. So I think, down the line, once digital work platforms become more established, in other countries perhaps, there's definitely an opportunity for us. Why shouldn't there be?

Les Berridge, REC Technology

OPPORTUNITIES FOR RECRUITERS: AN OVERVIEW

The gig economy enables recruiters to:

- adapt and diversify their toolkits, by sourcing candidates via digital work platforms
- hone their service offerings to clients by helping them to make sense of this new gig working environment and the wealth of candidates it presents
- better stake their place as essential interlocutors between clients and candidates who can deliver a screening or quality-checking service as well as the 'human touch'
- strengthen their industry standards against these new unregulated or non-compliant marketplaces.

The following analysis seeks to delve more deeply into the relationship between the rise of the gig economy and the future development of the UK recruitment industry, both to help recruiters understand how to position their work in relation to this new development and also to help government understand what it could do to appease recruiters' concerns in this area.

Concern 1: Ensuring the gig economy does not threaten the role of recruiters

When a new recruitment channel comes on the radar and takes hold in the way that the gig economy is doing, you would be forgiven for raising the alarm bells and sensing a threat to more traditional recruitment methods. The UK recruitment industry is no stranger to new developments in its area: first there was the birth of the internet, then there was the advent of social networking sites such as LinkedIn, and now the gig economy presents yet another fresh challenge for the labour market to adapt to. Just as the internet and LinkedIn did not spell the end of the recruitment industry – and in fact enhanced it – discussions with established recruitment professionals reveal there is no real reason for recruiters to fear the growth of digital work platforms. Instead, the key is learning how to adapt to them and integrate them into your service offering:

Several years back as a recruiter I was told, 'The internet is coming and it's going to destroy the industry – it will make your services superfluous.'

Then came the rise of the job board, then social media – LinkedIn, Facebook, Twitter. At each stage it was to be the final straw – but each platform and technology has only sought to accelerate what we do – not hinder it. The main reason being, the volume of work that’s involved in the total talent management of people hasn’t changed.

Simon Conington, BPS World

There will always be disruptive models entering the industry, but I think there’s an element of traditional executive recruitment that will always be there. However, access to networks have changed: it used to be reputation and black books that provided executive access, but now we have LinkedIn and there are increasing numbers of digital work platforms, with people’s ease of access and increasing willingness to use at more senior levels. There’s much more access opportunity to reach skilled and experienced people. So the key differentiator isn’t so much access, it’s the ability to engage. After a period of encouraged ‘open’ networking, senior people are becoming much more discerning about who they link with and the style and quality of the approach to reach them is just as important online, as it always has been traditionally. The communication skills of a consultant are still very much required today.

Simon Drake, Exact Expertise

Are we a replacement for recruitment agencies? That’s not specifically where we’re aimed. That might happen in the future. You can employ people through what’s called a full-time upgrade on the site. But we’re essentially about the gig economy. You’re not talking, ‘Let’s employ a contractor to come and work in our offices and manage our sales for a six-month period where we can have a single invoice.’ That’s not what we are currently aiming for.

Joe Griston, Freelancer.com

The lower-skilled, lower-paid market

Industry experts have expressed fears that the rise of the gig economy could have negative effects on the lower-end of the UK contingent market – particularly in areas of low-skilled, low-paid blue-collar work. Our conversations with labour market experts revealed concerns that digital work platforms may reduce the need for recruiters in these lower-skilled areas:

There is definitely the capacity for disruption in traditional employment agencies. They themselves will need to adapt because, even if in lots of circumstances you need a formal, more drawn-out traditional recruitment process, there will always be some jobs where, actually, nipping online, you can hire a receptionist, a cleaner or a painter quickly and easily.

Daniel Tomlinson, Resolution Foundation

The question is how disruptive will digital work platforms be across the economy? Are they limited to certain sectors? It's easy to see how they could transform logistics and lower-paid jobs in sectors such as care and hotel trade. Those are 'B2C' markets mostly, and things we see and use as consumers every day.

Benedict Dellot, RSA

For certain services and sectors of the economy, the gig economy will change the way we work forever. For example, I've got an app on my phone called Bizzby, which enables me to get a babysitter or a dog walker at a press of the button. It's fantastic. It completely solves the problem of having to stick a postcard in the post office looking for someone to do those tasks for me. I think that concept has already expanded in the professional marketplace to IT experts, creatives and designers. And I think it will be extended to the traditional clerical temp market. Why would I phone an agency and say, 'Can you find me someone to fill my reception?' when I can just press a button on the app and have ten people forward their CVs to me?

Chris Bryce IPSE

I do think the gig economy is a potential threat to parts of the industry, and more likely to impact the contingent recruitment market. You've got to ask yourself, any consultant, what value you add every day to your clients, to your candidates, to your colleagues/business. If clients can gain easy access to candidates and have good judgement, maintain good processes and understand their employer brand and EVP, then, actually, unless you can add value, it's going to be quite risky and difficult to warrant reasonable margins.

Simon Drake, Exact Expertise

To placate fears in this area, however, it must be remembered that recruiters are mainly used by employers in contingent markets to get volume. It is not unusual, for example, for employers to use recruiters to find hundreds of workers at any one time to pack boxes in warehouses or to work on construction sites. The gig economy, by contrast, works on a 'one-to-one' model where employers source individual workers to complete certain tasks. As they stand, digital work platforms are not set up to move into the 'volume space' currently occupied by recruiters in the contingent market and our conversations with representatives of online talent marketplaces give no reason to believe this is likely to change anytime soon.

Incorporating digital work platforms into recruiters' work at the lower end of the labour market could also prove difficult to justify on economic grounds. Chris Bryce, CEO of IPSE, is concerned that it would be too costly for recruiters to incorporate them into their business strategies at the lower end of the market, since the margins are just not high enough to warrant it:

I don't think digital work platforms are something recruiters could use. The simple reason for that is the margins are just not there for them. When

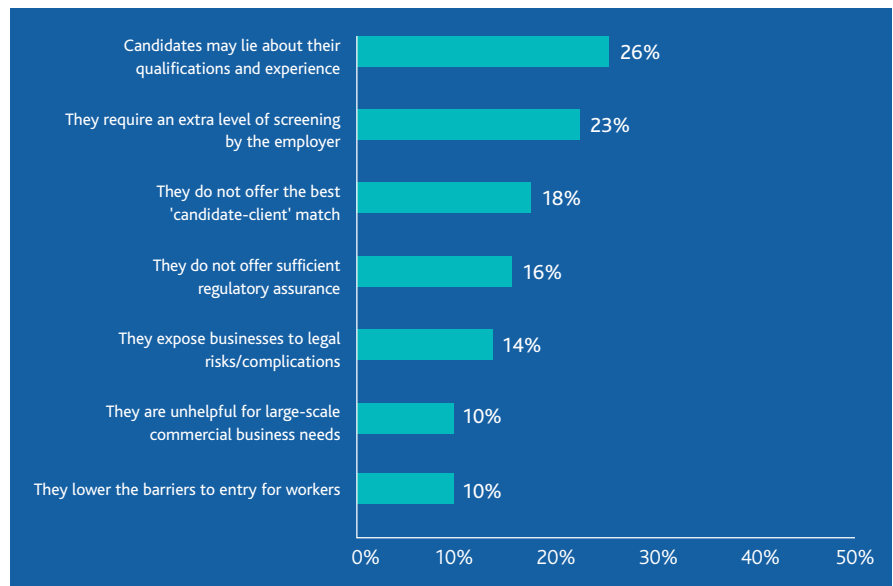
we see somebody contracting to provide a website, for example, it could be for up to £10 an hour. The platform already takes its cut and the small agencies likely to use such a platform are probably cash-strapped anyway. There just isn't the margin there and I would think that a recruiter's business model just wouldn't allow them to get involved in that. It would just be too expensive.

Chris Bryce, IPSE

Quality control

Despite the efforts invested by the creators of digital work platforms in developing robust rankings and ratings systems, some business leaders argue that these sites still cannot guarantee the quality of the candidates they are offering to potential employers. When asked about the main risks to businesses in using digital work platforms to recruit workers, 26% of the 614 business decision-makers we surveyed via YouGov said they feared candidates may lie about their qualifications and experience, 23% said gig workers still require an extra level of screening by the employer and 18% said they thought online talent marketplaces still do not offer the best 'candidate-client' match:

FIGURE 9 / IN GENERAL WHICH, IF ANY, OF THE FOLLOWING DO YOU THINK ARE THE RISKS TO BUSINESSES IN USING DIGITAL WORK PLATFORMS TO RECRUIT WORKERS?



Not applicable – I don't think there are any benefits to businesses of using digital work platforms (16%), Don't know (30%), Other (4%)

Herein lies a major opportunity for recruiters, as they can screen more effectively the quality of the candidates using the 'human touch'. The industry experts we spoke to pointed out that, at the end of the day, digital work platforms can only provide a listing of potential candidates. They do not do the essential

sifting-work for employers or the necessary legal screening and proofing of a candidate's right to work. These are functions that are still best performed by a recruitment professional and, as such, experts believe that recruiters could realistically work alongside employers in the selection process of potential gig workers:

Employers can look at somebody's portfolio on these sites, but that doesn't necessarily guarantee the quality of their work. Also there's the risk that you could be contracting somebody who might have little commercial background or you could potentially allow yourself to be inundated with applicants who are not really qualified. So, in this respect, recruitment agencies do a good job and they still have a significant role to play.

Chris Bryce, IPSE

With the gig economy, employers are going to have to think about screening. So if I put a job out there, what happens if I get a thousand applicants? – half of which are in China and half of which are in India? How do I make a decision? Who's going to do the screening? This can create a problem with demand. If you're using a recruitment agency, someone manages this for you. You outsource that activity: the screening of the CV, the checking of the data, making sure they've got the right to work, making sure they've got the right skills, etc. In the gig working environment no one does that for you. The platforms don't do it – they offer an introduction service. You have to work that out for yourself.

Kevin Green, REC

As a result, it is perfectly feasible that digital work platforms could become part of a recruiter's repertoire outside lower-end markets. According to established recruitment professionals we spoke to, the advent of the gig economy has only made the role of a recruiter more necessary. Although employers may think that they have access to more candidates via these channels, it is still up to a recruiter to 'seal the deal' and tempt the 'right' candidate in the direction of the employer. Particularly in the higher-end markets, a recruiter's interaction is always going to be necessary to deliver candidates effectively in important roles:

The role of a recruiter is to find the best and brightest talent for our clients, a bit like going to a cloudy river where no one can see the fish and plucking out the prize salmon. Since social media and job boards that river has become a lot clearer which means it's easier to see the fish. The challenge now has moved on from simply finding the fish, to persuading the right ones, the ones that may even be hiding under rocks, to be interested in the bait. The job of setting yourself apart: attracting, not selling to these candidates becomes paramount. We also have to think about why these fish are under the rocks – why aren't they engaging? Is it because they are fatigued and bombarded

with too much technology? The answers provide us with the best bait and this is what our clients look for in a partnership.

Simon Conington, BPS World

The personal touch

Another area where digital work platforms fall short compared with the role of recruiters is that of fostering solid human working relationships between employers and candidates. Such relationships are particularly important in the higher end of the labour market, where the role of recruiters is essential to broker senior-level appointments. Our discussions with industry experts suggest that the inability of digital work platforms to provide this 'brokering' function will only enhance the need for recruiters in these areas. The positive effect is that this could cause UK recruiters to raise the bar even further, as they further hone their services and position themselves neatly as the key interlocutor between clients and candidates for high-end, business-critical appointments:

What we will lose with the rise of the gig economy is that personal involvement in the relationships between those who need work done and the people who do the service. When I started as a contractor, a long time ago, it was fantastic. I had a really good relationship with the agencies I worked through. They looked after us well. They made sure we were happy. You don't get that with an app. As a consequence, I think you will see an increasing professionalisation of the high-margin, high-quality, high-cost contracting business – in sectors where relationships still remain key.

Chris Bryce, IPSE

There's definitely a value in using digital work platforms for a more fluid approach to talent, but there are no hard and fast rules. If you are sourcing a very particular skillset, using a recruiter who is trusted and proven, who can shortcut access to good-quality talent may be your best route. Or, you may find a niche jobs board that gives you direct access to talent. In today's market there are multiple options.

Emma Stewart, Timewise

I don't think the gig economy has impacted on the permanent executive recruitment market. You could say it's already in place with interim executives, who often contract direct with clients. So much of what we do is relationship-based and trust-driven, it's akin to the sort of the relationship you have with a lawyer. The sort of work we do, if it's an SME and it's your business, it's your livelihood that we're impacting by helping you find a leader to solve a problem. They're going to join and have a big impact on the leadership team. That can be really disruptive and quite damaging if it's handled poorly, so employers need to trust you that you're going to do a great job. For a large plc or public organisation, achieving the right leadership hire, often quickly, is imperative for reputation and success and the value we provide as an independent third party, supports this. That's the role executive interim

and search consultants fill and even the most complex of artificial intelligence or digital work platforms will not easily replace that for many clients.

Simon Drake, Exact Expertise

Concern 2: Ensuring the gig economy does not threaten industry standards

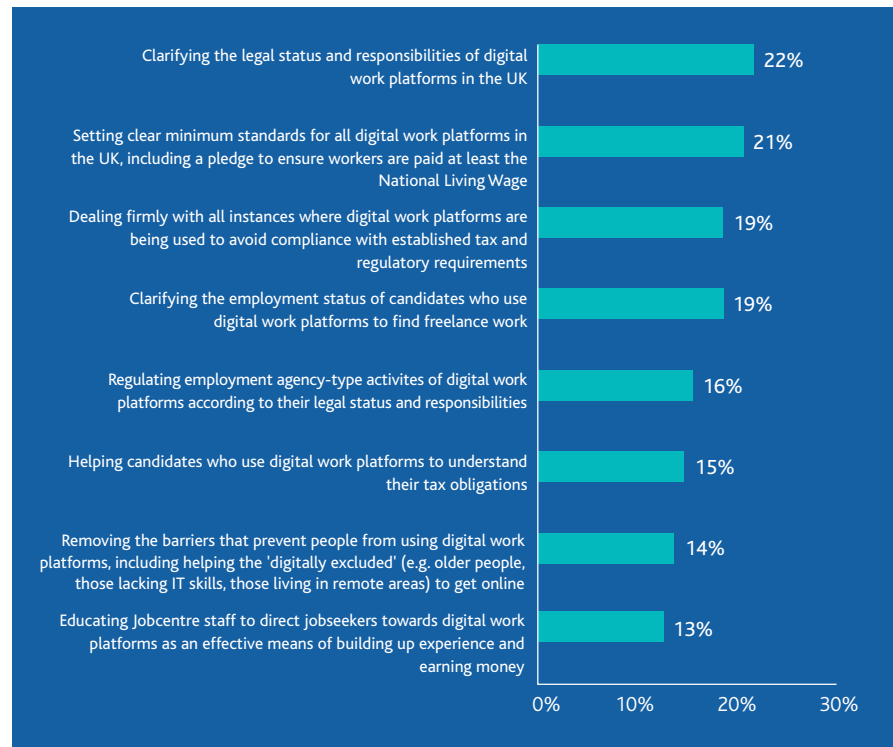
It cannot be denied that much of the debate around the gig economy is focused around the lack of protections for workers and their lack of access to social security provisions. Our discussions with recruitment experts nevertheless reveal that debates about regulation are also important from the perspective of recruiters. The UK recruitment industry is a highly regulated industry, in which members are obliged to follow strict legal standards and codes of compliance. If the gig economy begins to disrupt the recruitment marketplace, we run the risk that recruitment agencies will become very unhappy. So government will have to make a decision about its regulatory approach.

The objective should be to create fairness between digital work platforms and professional search firms and agencies. Our survey of 614 business decision-makers shows that employers, too, would benefit from more regulation of the gig economy: 22% of those surveyed said their business would be encouraged to use digital work platforms if government clarified the legal status and responsibilities of digital work platforms in the UK. Twenty-one per cent said they would be encouraged if government set clear minimum standards for all digital work platforms in the UK, including a pledge to ensure workers are paid at least the National Living Wage. Almost one in five (19%) would be encouraged if government dealt firmly with all instances where digital work platforms are being used to avoid compliance with established tax and regulatory requirements, suggesting that the government would do well to regulate the gig economy in the same way as it does the UK recruitment industry:

If you think about the 'Uberisation' of work, I think we could find ourselves in exactly the same situation as we have done with Uber, where the incumbents, our members, the recruitment industry, could say, 'Hang on a minute, these people are doing very similar activity to us, but they've got a completely different regulatory environment.'

Kevin Green, REC

FIGURE 10 / WHICH, IF ANY, OF THE FOLLOWING ACTIONS COULD THE UK GOVERNMENT TAKE THAT WOULD ENCOURAGE YOUR BUSINESS TO INCREASE THE USE OF DIGITAL WORK PLATFORMS FOR YOUR STAFFING NEEDS?



Not applicable – nothing the UK government did would encourage my business to increase the use of digital work platforms (32%), Don't know (24%), Other (1%)

Our conversations with industry analysts suggest that encouraging digital work platforms to self-regulate could be one step in the right direction. To keep them on track, we all have a responsibility to report instances of bad practice to put 'peer pressure' on the system to regulate itself. Our discussions with representatives of digital work platforms also reveal that they are not averse to the idea of government regulation, so long as this facilitates the use of their online talent marketplaces by employers and workers alike:

You have to think about the two extremes of how countries approach big platforms. We need to be arguing for some kind of happy medium between 'anything goes' and outright bans, an approach where we really engage with these platforms to encourage them to self-regulate and to make sure that they provide protection and security for their workers of their own accord.
Benedict Dellot, RSA

I think there is a real need to ensure that workers have the protection they need when new markets are being created like the gig economy. So it's about finding the right balance between stimulating job creation and growth, but also those organisations operating in this space should be governed by good practice. There's a role to play for all of us, if we see bad practice, to shout about it.
Emma Stewart, Timewise

In the future we want to replicate the first 'online country', where people are doing commerce with everyone all over the globe as easily as they would if it was in the same place. So it's a combination of things that government should do to allow that to happen.

Joe Griston, Freelancer.com

To add impetus to the need for clear regulation of the gig economy, our discussions with industry leaders show great optimism about the capacity of the UK recruitment industry to adapt to the new environment of the gig economy should government and businesses bring in the appropriate legislation:

Our market's ability to change and deliver leaders for private and public sector clients is impressive. We can help achieve change quickly. If anyone has the potential to adapt to the gig economy, it's the UK and its professional recruiters. The value to UK plc and for government transformation is huge. I think we underestimate it massively.

Simon Drake, Exact Expertise

SUMMARY: THE IMPACT OF THE GIG ECONOMY FOR RECRUITERS

As our discussions have shown, the advent of the gig economy can be seen to bring opportunities for UK recruiters. These include the opportunity to:

- adapt to the changing, more tech-savvy world in which we live
- incorporate digital work platforms into existing recruitment toolkits as another means to access a wide range of candidates
- reinforce the role of recruiters as essential interlocutors between employers and gig working candidates
- strengthen industry standards against unregulated online talent marketplaces.

Recruiters are nevertheless concerned about a number of challenges posed by the gig economy to their profession. These include the risk of:

- digital work platforms negating the need for employers to use recruiters to source workers, particularly for low-paid and low-skilled temporary work assignments
- digital work platforms undercutting the price and speed of recruiters' work.

Our conversations with industry experts have revealed that these perceived risks can be mitigated by a number of factors that work to recruiters' advantage. These include the fact that:

- digital work platforms can be seen to have further 'muddied the waters' for employers, so recruiters need to assist them in tempting candidates to work for them
- the human touch is almost always essential for negotiating and securing high-end placements
- employers may still want to quality-check and screen gig working candidates – a role that recruiters can undertake
- digital work platforms are primarily used for ad-hoc, project-based work, so they do not interfere with the longer-term placements that recruiters are typically used for.

THE RISK OF GIG WORKING IS FLEXIBILITY AT WHAT PRICE?

EMMA STEWART, TIMEWISE

06

WHAT IS THE IMPACT FOR CANDIDATES?

Whatever your attitude to the gig economy, there can be no doubt that the people most greatly affected by this new way of working are the workers themselves. Although self-employed people have long been a growing force in the British labour market, the opportunity to source gigs through digital work platforms exposes the self-employed to a whole host of new opportunities and risks that sourcing work through more traditional means avoids. This section of the report concentrates on outlining the main concerns of the UK's self-employed community with regard to the growth of the gig economy. In doing so, it identifies the main areas which need to be addressed before the self-employed can fully harness the opportunities that gig working has in store for them.

Although the gig economy is very much a construct of the twenty-first century, with its reliance on internet-enabled technologies, conversations with representatives of digital work platforms reveal that they do not believe they have created a new way of working but, instead, have facilitated a break from the '9–5' model imposed by the industrial age. Clarifying his thinking, CEO of Upwork Stephane Kasriel explains:

The '9–5' job, where people need to be in an office, have a rigid employment contract and show up at specific hours, was a construct of the 19th century that started because of the Industrial Revolution. People needed to be in the factory all at the same time, otherwise the factory would not run. If you go back to the 18th century, however, that's not how people worked; people were working in the cottage industry, where the economy was much more product-based, and people went out to the clients. The freelance economy is really just going back to what it was prior to a set of constraints that no longer exist.

Stephane Kasriel, Upwork

Although it is important to acknowledge the challenges that gig working brings to people choosing to work this way – including the lack of social security provisions and the insecurity of work (topics that are addressed in detail later in this section) – the benefits that gig working can bring to candidates should also not be underestimated. Our discussions with industry experts have highlighted that freelancing via digital work platforms improves exposure to the global labour market, the speed of finding work and the ability to work on your own terms – be this the hours you choose or the price you set. The following quotations clarify just some of the benefits associated with the new gig working culture for candidates:

The gig economy is quick. It puts you in direct contact with the end-user – the client. It enables you to bid for work more quickly and it is a good route to being found by the client. The client can search through specifics and find

two or three people who they want to invite to bid for work and take it from there. So it is much quicker than the traditional agency model.

Chris Bryce, IPSE

Essentially, as a freelancer on our site, you're connecting to the millions of businesses all over the globe that you wouldn't have had access to before. That's really the main thing that we're facilitating here. Now, wherever you are on the planet, you can have access to work from anyone else on the planet. It's such a powerful thing. It's a global reach. Someone who lives in rural Indonesia can get work from someone in Norway. It's really about exposure to work more than anything else.

Joe Griston, Freelancer.com

OPPORTUNITIES FOR CANDIDATES: AN OVERVIEW

The gig economy enables candidates to:

- market themselves globally and work for different clients around the world
- develop an interactive CV, with reviews, ratings and even examples of previous work
- experiment with different careers, both alongside or instead of traditional employment
- work flexibly at a time or in a place that suits them
- set their own price and terms depending on availability or demand.

Despite these incredible benefits, the following analysis introduces some of the main concerns of the UK's freelance community with regard to the gig economy, in order to provoke government and other influential stakeholders to address these 'grey areas' in the UK labour market and make this type of working more sustainable for the country's self-employed in the future.

Concern 1: Ensuring gig workers have a clear employment status and associated rights

By far the main concern surrounding freelance gig workers is their lack of a clear employment status and their subsequent lack of associated rights and entitlements. Our conversations with industry experts highlight the urgent need for government to make regulatory and legislative provisions for our new brand of gig workers.

Members of Parliament and industry experts help us to expand on what the challenges for government are. Our findings reveal that the main issue for government is to find a way to accommodate another type of working outside the

conventional PAYE system and to find means to make social security provisions work outside of the traditional 'employment arena'. This could involve finding a way for gig workers to share risk, create more security for themselves and help them to prepare for any unexpected shocks:

The challenge for workers is that they need new ways of coming together to share risk. At the moment if you are an Uber driver, for example, you've got to put aside savings plans of your own for what happens if you don't work. So there are risks that workers in the gig economy can't control at the moment and they are having to invent their own arrangements for managing those risks. This applies to quite a number of quite well-understood categories – so you've obviously got policies of labour rights like sick pay, maternity rights, paternity rights – the things that you don't get back automatically because your NIC (National Insurance Contribution) rate is lower. There will, therefore, be questions about how you lower the costs of supply to workers in this economy, for example insurance or financial services products, but it's not a part of the labour market that is terribly well understood at the moment.

Rt Hon Liam Byrne MP

I think the government is beginning to realise that the way people work has changed forever. What it needs to do is make that a progressive and evolutionary improvement to the economy and actually harness that creativity and that spirit of enterprise, and encourage it. It's a ludicrous notion in this day and age that the government seems to feel everybody should be paying PAYE and they should be using the same methodology as PAYE employees to declare tax. For the gig economy to flourish, the government is going to have to segment the tax system in the way that technology has segmented the workplace. If government doesn't get agile, the economy will never be agile.

Chris Bryce, IPSE

Looking at the insecurity of gig workers, the majority lack a lot of rights that employees have – so no minimum wage, no knowledge that they'll be able to continue in their employment, no job security. Workers being paid for each individual task with minimal job security isn't a new thing, it's a return to the piecework of old – a type of work that was almost confined to economic history books. Of course, many gig economy workers will enjoy the flexibility that such working arrangements bring, but it's my view that more workplace security is needed in the gig economy before we can conclude that it's a positive development for everyone.

Daniel Tomlinson, Resolution Foundation

Self-employment is a good form of work, but it comes with many pitfalls and perils. If you work for yourself, you don't have access to sick pay, maternity

pay, holiday pay, all these benefits employees are used to. Also you don't have employer pension contributions. All of this is hazardous and affects the poorest self-employed workers particularly hard.

Benedict Dellot, RSA

Concern 2: Ensuring gig workers are not devalued by the system

Another concern that dominates debates around the gig economy is ensuring that gig workers are not devalued by the pressures of the system. Although earlier in this report it was revealed that the lower cost bases that the gig economy provides could be advantageous to British businesses, efforts must be made to ensure that this does not come at a high price for the candidates themselves at the grassroots of the system.

The real cost of flexibility

There are concerns that the trend of driving down the cost of work may have significant repercussions for candidates. Our discussions with industry experts revealed concerns that choosing to work flexibly may mean gig workers have to accept a lower pay rate for their efforts. Moreover, the flexibility offered by gig working may not, in fact, be suitable for everyone, as some people – such as returning mothers – require guaranteed flexibility which can better be provided for by temporary or part-time contracts. There is also the risk that employers may start turning to gig workers in an attempt to avoid compliance with national wage regulation and to push down hourly pay rates. In this respect, there is definitely a role for government to play in protecting British gig workers from the following pitfalls in the system:

The risk of gig working is flexibility at what price? What our candidates want is to be decently paid and to have flexibility. There is a challenge that a lot of very flexible jobs are on the lower end of the jobs market and obviously on an hourly basis, rates can sometimes be lower than the rates you'd have if you were in permanent employment. You shouldn't necessarily have to compromise pay for flexibility.

Emma Stewart, Timewise

The gig economy will appeal to those who crave job adaptability. Being adaptable is more about the joy of change and wanting to explore a more fluid concept of work (i.e. different job roles, locations etc.) This is fundamentally different to flexibility. For some flexibility is key – for example we have benefited from the expertise of return to work mums in our company, and whilst the hours need to work around commitments, our teams

still look for the stability of the working contract. I think in an ever-changing landscape there will be a place for all work styles – perhaps the challenge will be whether all of them will be offered.

Simon Connington, Conington, BPS World

Generally, the rise of the gig economy is very good for consumers. The fact that consumers are able to enjoy lower costs and more efficient services is an unambiguously good thing. But I do wonder if there will be more companies, especially newer companies and small firms, that will be looking to recruit people in non-traditional ways purely so they don't have to pay the higher National Living Wage. The government has got to be watching and should consider how it can respond if the Low Pay Commission or others find examples of employers changing the way they recruit to avoid this.

Daniel Tomlinson, Resolution Foundation

The representatives of digital work platforms we spoke to were, naturally, keen to point out the flip side of this argument – namely that their online talent marketplaces give workers the chance to earn money. Particularly in developing nations, people could potentially give themselves a better quality of life. They also point to the advantage of the system being that it rewards the best workers, as not everybody is tied to the same job description and basic salary grade. In the gig economy, pay can be directly related to performance. Industry experts we spoke to also point out there are benefits to be had from the control that digital work platforms give candidates to set their own prices and terms. Working via an online intermediary gives gig workers the opportunity to raise their prices in periods of peak demand, thus enabling them to work the system to their own advantage:

The competitive nature of digital platforms such as Upwork, along with the very low barriers to entry/exit and the absence of wage ceilings or floors means that wages in these market are set at a level that is very close to what economists call the 'competitive market rate' – ie, the one that matches demand and supply for a given service. In addition, wages in the gig economy are often very flexible and may change more promptly in accordance with rising or falling demand and supply.

Mariano Mamertino, Indeed

Digital work platforms give freelancers access to a global marketplace, so they can price as they go along. If you think about an airline, it sells its tickets well in advance and it gets more expensive closer to the day. You might work the other way in the jobs market. So if, for example, you want to book me for six months, I'll give you a good price, but if I find myself with availability for the next two weeks, I might lower my price from £500 a day to £250 a day because I really want to work and earn some money. So, the gig economy gives the worker the ability to price themselves. It also works the other way

round. I could have four employers interested in getting my services over the next three weeks, so of course I'm going to put my price up.

Kevin Green, REC

Protecting workers' pay

Furthermore, our discussions with representatives of digital work platforms show that efforts are being made to protect workers from unscrupulous employers. By acting as an intermediary, the sites ensure funds are available to pay the workers, ultimately giving freelancers the peace of mind that they will receive the agreed award for their work upon successful completion.

From a freelancer's point of view, trust works both ways. They have to be able to trust the client too. We deliver funds from employers to our site, so we know those funds are available, so it ensures payment to the worker.

Joe Griston, Freelancer.com

Unfair rating systems

Although the first section of this report revealed the online ratings systems used by online talent marketplaces to be a step forward from the perspective of the employer – in so far as they are better able to quality-check candidates – our discussions with industry experts revealed that these systems may actually work to the disadvantage of gig workers, as they remove the potential for amicable discussions in the case of disputes. As Daniel Tomlinson, researcher at the Resolution Foundation, points out, online ratings systems may unfairly empower the employer in the 'employer–contractor' relationship, as an unjust negative review can have an instant negative impact on a worker's potential to attract future business:

The online rating system used by digital work platforms is not a uniformly bad thing – consumers deserve to be well informed and enjoy a good service. But it is more arbitrary than in traditional employment where if there were issues with your standards you might have a discussion with your clients, or your manager might take action to help you improve, whereas with the gig economy your customers instantly stop turning to you. No one is checking the people that are giving the ratings which means it's much more difficult to know that the ratings are objective.

Daniel Tomlinson, Resolution Foundation

Our discussions with representatives of digital work platforms have revealed that they are taking steps to put in place mechanisms to resolve any potential disputes between workers and employers with the aim of creating an even playing field for employers and contractors alike, including monitoring interactions.

Concern 3: Ensuring the gig economy continues to work for all types of freelance worker

The industry experts and representatives of digital work platforms that we spoke to all recognise that the gig economy is used by lots of different types of freelance workers. In short, our conversations revealed that there is no 'one size fits all' profile of a gig worker. Some of the examples of gig workers known to experts are existing freelancers, particularly those with short-term availability for work and of a younger generation. Some gig workers were also found to be people pursuing a hobby or a business outside of traditional employment, while others are actually retired workers – or 'silver surfers' – looking for a means of continuing employment activities on a more flexible basis:

By and large gig working is not something that has yet filtered down to the majority of our members. Some will use Upwork and other platforms to find work that way, but most of our members are probably in it for the longer term than the gig economy tends to suggest. I'd say gig workers will largely be those who are serving multiple clients simultaneously, rather than the serial single-client contractors. That is a very traditional contracting model, where people contract normally through an agency for an extended period of time – say three months up to a couple of years – with one client, full-time. The majority of our members work that way currently. What we are seeing, however, is a number of younger, newer members coming along who perhaps perform specific project-based work – like delivering a website or making a gizmo work better – and they are probably going to be the benefactors of the gig economy rather than the long-term contractors.

Chris Bryce, IPSE

We undertook research with Etsy sellers and looked at who was using the site, why they were using it and how much money they were making. The vast majority are part-timers, but a lot of the sellers are doubling up, so they have a day job but also they have a business on the side. For most of them it's a hobby and it couldn't keep them going on its own. I met one seller who works in a car factory in Birmingham, but he makes and sells jewellery in his spare time on Etsy. There are probably a lot of people who have day jobs and are tempted to branch out into a new career, and sites like Etsy make it easier. I can quickly make a profile, start off with a very low price, hoping to get some work and then build it up from there.

Benedict Dellot, RSA

I think, when it comes to who's using the gig economy, the general consensus would be millennials, the younger, more socially aware individuals, but I would argue that it's a much broader perspective than that. I would say that the 'silver surfers' are going to be a better audience for that way of working than most people probably believe. They're often just as adept at using online

services and they're just as interested in online as a channel to the market as a means of continuing to work after retirement.

Simon Drake, Exact Expertise

As employment rates for 65+ cohorts continue to rise, employers in the gig economy could benefit greatly from this pool of experienced talent. Offering roles with in-built flexibility will allow this cohort to continue working, in agile roles that fit around other lifestyle commitments like volunteering and childcare support.

Mariano Mamertino, Indeed

When asked to sum up the users of his site, CEO of Upwork Stephane Kasriel provides a comprehensive overview of the types of people his digital work platform attracts:

In terms of demographics our users are actually pretty well spread even between the three generations that are in the workforce: so the millennials, the Gen Xs and the baby boomers. The motivations however can be very different.

Among baby boomers, many have retired from full-time jobs but continue to want some professional pursuits. In some cases that's due to not having enough retirement savings. In other cases it's due to people thinking that, 'I'm 60 or 65, I'm still very active, intellectually and physically, and I don't want to be playing golf for the rest of my life. I need to do something meaningful for society.' Fifty years ago when people retired, their life expectancy was imminent so people had to enjoy the last years they had. Now when you retire at 60 or 62, you're still going to live another 20 years maybe. A lot of people don't work for the first six months and then realise it's kind of boring and want to get back into it.

Looking at Gen X freelancers, for many freelancing is about flexibility because they have other things in their life. They have a spouse, they have moved to different locations, they have young children at home that they want to take care of, or they have an elderly parent who takes up a lot of their time and requires them to stay in a location where the job market is not that good.

And for millennials, they want to be in charge of their own destiny – many don't trust companies to take care of them. And they want freedom and flexibility because they're still in this stage of their life where they are able to travel a lot and want to have a job where they can work from anywhere.

Stephane Kasriel, Upwork

Therefore there is a pressing need to ensure that, when addressing issues of regulation for the future, the gig economy continues to work for a wide range of people of all ages and situations. As our conversations with industry analysts show, more research into the impacts of the gig economy on each of these different types of candidate would obviously be beneficial, and it is the job of government and other senior decision-makers to ensure that the system works for everyone involved:

The government and the ONS should make more effort to properly measure the impact of the gig economy. In America, the Department of Labor is

introducing a specific set of questions next year on 'contingent workers', which is the term they use, to find out how freelancers are working and what platforms they use. Some other countries are doing a bit more and we need to catch up.

Daniel Tomlinson, Resolution Foundation

Generally speaking, regulating the gig economy is about allowing innovation to flourish but making sure the advantages of it are well distributed. What's needed is the kind of approach we first took to self-employment, which is, 'This is a great trend, but how do we make it work for more people?'

Benedict Dellot, RSA

SUMMARY: THE IMPACT OF THE GIG ECONOMY FOR CANDIDATES

As our discussions have shown, the advent of the gig economy can be seen to have brought a number of opportunities for candidates. These include the opportunity to:

- earn money and make a living
- market themselves globally and make themselves available to work for clients around the world
- set their own terms and conditions of work, including price, time and location
- develop an interactive CV that includes reviews, ratings and, perhaps, also examples of previous work
- experiment with different careers, either instead of or alongside traditional employment.

Candidates are nevertheless concerned about a number of challenges posed by the nature of gig working. These include the risk of:

- being excluded from having the same protections and entitlements as those in traditional employment, including pensions, statutory sick pay and holiday entitlement
- not being assured continuity of work (a particular concern for workers using the gig economy as their primary source of income)
- being forced to lower their rates due to increased global competition
- losing control over their digital résumés, as online ratings systems give prominence to clients' reviews
- not getting the type of 'fixed flexibility' that part-time contracts offer.

Our conversations with industry experts have revealed that these risks are not to be downplayed and efforts should be made to support the UK's gig workers for the future.

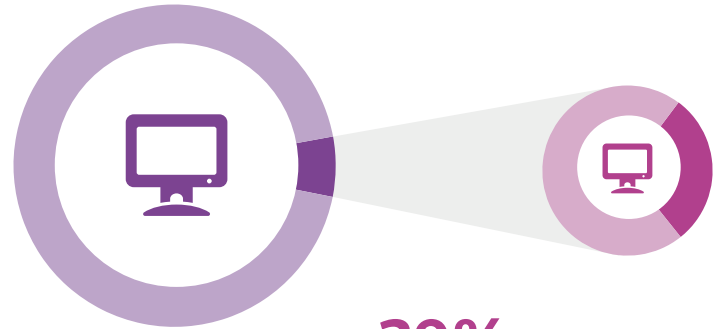
Gig economy

The Uberisation of work

The world of work is changing. Digital work platforms have accelerated a trend towards flexible, project-based employment, which presents both opportunities and risks to employers, recruiters and candidates.

BY 2025

The effect of digital work platforms:



6%
of British businesses currently recruit using digital work platforms.

29%
say it is likely that digital work platforms will become more important to their business in the next five years.



47%

of all pieces of work on Freelancer.com are awarded to the average or higher bidder.



OF BUSINESSES, WHEN ASKED ABOUT THE BENEFITS OF DIGITAL WORK PLATFORMS, SAY THEY CAN BE QUICKER THAN TRADITIONAL RECRUITMENT CHANNELS.



OF BUSINESSES WOULD BE ENCOURAGED TO INCREASE THEIR USE OF DIGITAL WORK PLATFORMS IF UK GOVERNMENT CLARIFIED THE LEGAL STATUS AND RESPONSIBILITIES OF DIGITAL WORK PLATFORMS.



OF BUSINESSES PERCEIVE THE USE OF DIGITAL WORK PLATFORMS AS BEING MORE RISKY THAN BENEFICIAL FOR THEIR BUSINESSES.



13%

of British people believe they will be working in traditional '9-5' employment by 2025.



26%
of businesses surveyed said they feared candidates sourced from digital work platforms may lie about their qualifications and experience.



23%
of businesses surveyed said candidates require an extra level of screening by the employer.

'THE GIG ECONOMY IS PART OF HOW THE WORLD OF WORK IS SHIFTING. IT'S ECONOMICALLY INEVITABLE THAT IT WILL BE PART AND PARCEL OF HOW THE FUTURE ECONOMY FUNCTIONS.'

RT HON LIAM BYRNE MP

Data sourced from: REC-YouGov survey of 614 GB business decision-makers, Intuit, The McKinsey Global Institute, Freelancer.

**THE GOVERNMENT AND
THE ONS SHOULD
MAKE MORE EFFORT TO
PROPERLY MEASURE
THE IMPACT OF THE
GIG ECONOMY.**

DANIEL TOMLINSON, RESOLUTION FOUNDATION

07

RECOMMENDATIONS

Below are the actions that we, at the REC, think should be taken to build on the findings of this report and to mitigate some of the challenges we have identified for those stakeholders involved in the emerging gig economy. These recommendations recognise that employers, recruitment agencies, candidates, government and the media can all play a part in ensuring that the entire UK labour market can fully benefit from the use of new online talent marketplaces.

Employers

UK businesses are, ultimately, the end-users of the services workers provide, working via digital work platforms such as Upwork and Freelancer.com. Employers should:

- Respect good practice in the industry, particularly in areas covering pay and rewards, and agree to pay workers fair rates for their work in line with the National Living Wage threshold.
- Operate in an appropriate, transparent manner on digital work platforms, releasing funds to the sites as necessary to guarantee worker payment.
- Not unfairly hamper workers' chances of securing future work by leaving unjustified negative reviews or low ratings on their profiles, without any attempt to mitigate the situation first.
- Develop appropriate ways to engage with gig workers to ensure they understand and respect the companies' brand (i.e. the culture, mission and ethos).

The REC's Good Recruitment Campaign already embodies these principles and will enable businesses to adequately adapt to the growing gig economy, helping to guide recruitment operations through the necessary changes.

Recruiters

The UK recruitment industry is directly impacted by the rise of the gig economy and digital work platforms, which offer an alternative method for employers to source and engage with workers. Recruiters should:

- Seek to incorporate the use of digital work platforms into their repertoire as a means of sourcing candidates, particularly in the higher-end, senior-level market.
- Hone their service offering to clients, positioning themselves as vital interlocutors to help businesses secure the candidates they need. This could include emphasising their ability to screen and quality-check candidates.
- Always seek to deliver first-class service to clients and candidates alike as a way to empower the industry and showcase it to the outside world as providing an essential service to UK plc. REC members can benefit, among others, from the training and auditing services we provide.

- Continue to respect industry regulations to work to make the UK recruitment industry the best in the world.

Candidates

Candidates in the UK who use digital work platforms to source short-term, project-based work (gigs) should:

- Be aware of the insecurities that gig working can bring and make alternative financial provisions to plan for any future eventualities (i.e. long periods out of work, illness, retirement, pregnancy, etc.).
- Be transparent about their service offerings, qualifications and experience on their online profiles.
- Seek to protect themselves as far as is possible when marketing their services on digital work platforms. This should include not accepting a gig for payment below the National Living Wage threshold.
- Be conscious of the prominence of online reviews/ratings on their online profiles, and encourage employers to contribute positively to these systems to increase the prospects of gaining future work.
- Use the 'dispute' services provided by digital work platforms in the event of any issues with an 'employer' or non-payment.

Government

The UK government has a responsibility to see to the flourishing of the British labour market and to protect all who operate in it. To best accommodate the rise of the gig economy, the government should:

- Clarify the legal and tax status of gig workers and devise achievable and sustainable means for them to access social security protections, along with other self-employed workers.
- Consider the inequalities of regulatory requirements between the gig economy space and the UK recruitment industry, and set clear minimum standards for all digital work platforms operating in the UK.
- Look to other services to investigate the gig economy and its impacts further, particularly the Low Pay Commission, which could look into appropriate pay levels for gig workers and help to determine what is fair.
- Work with organisations such as ACAS and Citizens Advice to train their staff and ensure they are well equipped to deal with issues involving the gig economy.
- Deal firmly with all instances of non-compliance and bad practice involving the use of digital work platforms. This includes investing in enforcement and collecting all due revenues.

- Consider sustainable ways that gig working can be integrated into the UK labour market, particularly for low-paid workers with no other means of employment.
- Help to make the gig economy accessible to all by removing the barriers to candidates getting online. This could include honouring its pledge to roll out superfast broadband internet access to over 95% of the UK by 2017 or helping older workers to gain essential basic IT skills.
- Collect more data about the gig economy and its impacts to help inform future policy decisions. This could include adding questions focusing on the gig economy into the next census, scheduled to take place in March 2021.

Press and media

The media is responsible for the way people perceive the rise of the gig economy and its associated digital work platforms. It can potentially influence all stakeholders involved and either help or hinder the use of online talent marketplaces. The press and media should:

- Help to inform people of the gig economy and what it actually means for them, in real terms, to increase understanding and reduce fear.
- Report any issues that freelancers and employers face when working in the gig economy truthfully, to help inform government and society as a whole of the issues it needs to address.
- Explore the positives of digital work platforms to improve their wider perception, as they are a growing trend that will need to be embraced in the future.

- Recruitment's biggest lobbying voice
- The source of recruitment knowledge
- Raising recruitment standards
- Developing successful careers in recruitment
- Exceeding members' expectations through business support.

Jobs transform lives, which is why we are building the best recruitment industry in the world. As the professional body for recruitment we're determined to make businesses more successful by helping them secure the people they need. We are absolutely passionate and totally committed in this pursuit for recruiters, employers, and the people they hire. Find out more about the Recruitment & Employment Confederation at www.rec.uk.com.

Recruitment & Employment Confederation

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