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Work on Digital Platforms in the Valencian Community IV

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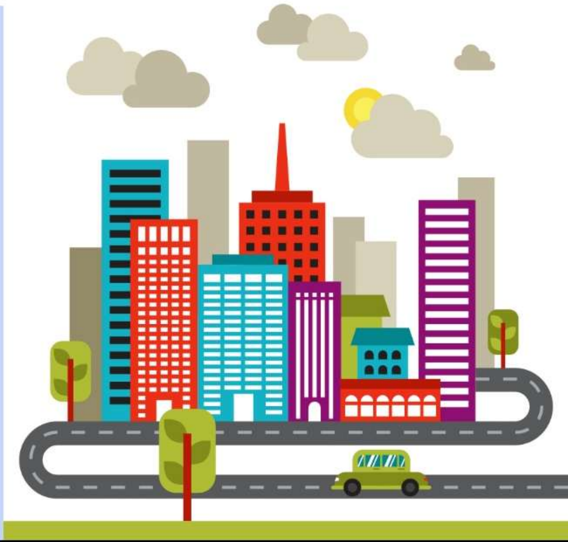
Executive Summary



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València, 2024.

WORK ON DIGITAL PLATFORMS IN THE VALENCIAN COMMUNITY IV

Executive Summary

The purpose of this study is to quantify the number of people currently working on platforms in the Valencian Community, analyse their profile, working conditions and work experiences in order to understand this phenomenon and its impact on the Valencian labour market. The data obtained this year has been compared with those collected in the previous three years (2021, 2022 and 2023) with the intention of being able to evaluate trends, changes and permanence in the demographic and professional characteristics of workers, as well as variations in their experiences and working conditions. This analysis has also been conducted with the objective of providing a series of recommendations aimed at improving working conditions and promoting public policies that take this type of employment into account, seeking a balance between its positive aspects and the protection of workers' labour rights. To this end, a survey has been carried out on a total of 2010 people in the Valencian Community between May 14 and 30, 2024.

Quantification and profile of workers on digital platforms

Magnitude: 11.2% of those surveyed in the Valencian Community have worked on digital platforms. This means that platform work has experienced a slight decrease in the number of workers in the last two years. This decrease might be related to the complementary/secondary nature of this type of activity and a general improvement in the rates of traditional employment. It should also be put in context with the greater temporal distance with respect to the COVID-19 effect that led to an increase in activity in the sector.

Gender Profile: Work on digital platforms is markedly male-dominated, something that contrasts with general labour market where both sexes are equated with a slightly greater female presence. This greater presence of men on digital platforms has been maintained in previous studies, although it has gradually tended towards equalization. On the other hand, greater gender differences have been observed in relation to specific sectors of activity, reflecting role patterns also seen in traditional work.

Age: Digital platform work predominantly attracts younger individuals. In 2024, 43.6% of workers are between 16 and 25 years old, with a decrease in the participation of people over 36 years of age. An overrepresentation of the younger age groups that has also been observed in previous years and that is even more pronounced in the current study. This phenomenon is related to the higher digital literacy of young people and the lower barriers to entry into the sector, which allows young people to find a paid activity on digital platforms more easily than in traditional work, making these a kind of "shelter" employment.

Geographical distribution and origin: This year continues the trend observed in 2023 where digital platform workers in the Valencian Community tend to be more present outside the main metropolitan areas, such as Valencia and Alicante, compared to conventional workers who are more concentrated in these urban centres. This marks a reversal from patterns noted in earlier studies. With regard to the origin of the workers, there is a reduction in the importance of platform work among the migrant population. Although in the first years the migrant population on platforms was markedly overrepresented in relation to traditional work, this year this overrepresentation has been reduced again, although it is still significant.

Socioeconomic level, education and employment status: A constant in the profile of the worker on digital platforms in recent years is the great predominance of people with high or medium-high socioeconomic levels and also with high educational levels (university studies or similar). This reflects a good economic situation of the majority of platform workers which is attributed not to their platform work, but to other primary income sources. In relation to the areas of studies of platform workers, Engineering and Architecture, as well as Arts and Humanities, are overrepresented compared to the general population. In contrast, areas such as health sciences have shown a drop in representation in this sector. Finally, with regard to employment status, self-employed workers show a greater inclination towards working on digital platforms this year, a trend that has experienced a rebound after a period of stabilisation after the pandemic.

"Digital platform work in the Valencian Community tends to attract a young, male-dominated highly educated demographic, often using it as a source of supplementary income. Their wider geographical distribution and the slight overrepresentation of migrants and self-employed individuals distinguish them from conventional workers."

Characteristics of working on digital platforms

Complementary work: The majority of platform workers (76.8%) engage in this activity as a secondary source of income, dedicating fewer than half of their working hours to platform work. Women and young people tend to spend more hours on platform work compared to other groups. Additionally, platform work is used as a supplementary source of income: fewer than 25% of workers consider it their primary source of income, and only 10.5% earn half or more of their total income from platforms—a figure that has decreased in recent years. Women tend to rely more heavily on platform work for income than men, which may be related to the existing gender pay gap in traditional employment. This characteristic of platform work as a complementary activity has been consistent over the years, becoming a defining feature of the sector.

Income and expense coverage: Net income data reveals that over half (52.5%) of platform workers earn €8 or less per hour, below Spain's 2024 minimum wage (€8.87 per hour, as set by Spanish law). This trend reflects persistently low earnings, exacerbated by current inflation. Women, workers over 36 years old, and those in rural areas generally report lower hourly incomes compared to their counterparts, whilst higher levels of education tend to correlate with better earnings. In addition to low incomes, workers face operational costs and unpaid waiting times. Most workers (52.6%) allocate less than 25% of their income to cover expenses related to platform work, whilst core workers dedicate a higher proportion, highlighting the financial investment required in professional sectors. Waiting times, typically between one and two hours, reduce efficiency by extending working hours without increasing earnings. However, waiting times have improved significantly over the past two years.

This low profitability, a recurring issue since the first studies in 2021, makes platform work a challenging alternative to traditional employment. The combination of long hours and modest income highlights its precarious nature, particularly for those who depend on it as a primary source of income.

Use of multiple platforms, frequency and time spent: A significant 77.2% of platform workers use two or more platforms to diversify their income, especially those relying on platform work as their main activity. This trend has remained stable in recent years, reflecting a low level of dedication to a single platform. Regarding time commitment, most workers engage in platform work at least weekly, though overall hours have decreased. In 2024, only 27.1% reported working more than 20 hours per week, suggesting that platform work tends to be short-term and concentrated in specific periods.

Sectors and types of activity: The primary activity in digital platform work is concentrated within the professional sector (56.1%), with notable participation in digital content creation, administrative tasks, and multimedia work. Transport and delivery services are less common but are more associated with men and rural workers. Significant differences exist in activities based on gender, age, and location. Younger workers and those in rural areas often engage in creative or content-driven activities. Women are more likely to participate in online sales and administrative roles, while men lean towards software development and transportation.

Employment status: Only 31.1% of platform workers are directly employed by platforms, whilst 68.9% have alternative arrangements, including self-employment (17.7%), invoicing through companies or cooperatives (25.9%), and other forms of engagement (13.5%). Compared to the previous year, the proportion of freelancers has significantly decreased, while platform employees have increased. Many workers invoice through third parties, suggesting that platform work often serves as an occasional activity rather than a continuous professional endeavour.

" Working on digital platforms remains a supplementary source of income, with a diversification of activities that varies according to socio-demographic factors. It is, however, challenging for workers who are economically dependent on such platforms to secure a decent income. In most cases, platform work proves to be unprofitable, with hourly earnings often falling below the Minimum Interprofessional Wage. Furthermore, it frequently involves costs related to the activity that must be borne by the platform worker, as well as unpaid waiting times."

Platform-worker relationship

Access to the platform: Most workers (52.8%) access platforms free of charge, although 36.6% must pay for access. This marks a reversal of the previous trend, where paid access had been increasing since 2021 at the expense of free access. However, despite the improvement in this year's figures, a third of workers still must pay to work on platforms.

Task assignment: Nearly half (45.5%) of workers choose the tasks they wish to perform, while 34.8% have tasks directly assigned by the platform.

Communication and replication channels: Only 52.5% of workers have access to replication channels or platform assistance, a figure similar to previous years. Additionally, only 46% report having efficient channels to discuss measures adopted by the platform.

Control and monitoring: 66% of workers believe that the platform regularly verifies the quality of their work, with this type of control being more frequent among workers with medium education levels and those who rely on platforms as their primary income source. Regarding monitoring, 60.8% feel that the platform frequently monitors their activities. Overall, there has been a notable increase in platform control and monitoring compared to previous years.

Dress and conduct standards: Platforms impose conduct rules on 40.2% of workers. These figures confirm a downward trend observed since 2023, with such requirements decreasing for the second consecutive year.

Restrictions on subcontracting: The majority of platforms (55.7%) prohibit workers from outsourcing or delegating their tasks. However, this restriction has significantly decreased over the past two years.

Training: Approximately 51.6% of workers receive initial training from the platform, but only 38.5% receive ongoing training. While initial training levels have remained relatively stable over the past two years, there has been a clear decline in continuous training.

Payment of remuneration and pricing: The majority of workers (59.3%) receive payment directly from the platform, an increase in this payment method at the expense of direct customer payments. This shift reverses the trend observed last year and aligns with the situation in 2021. This payment method is particularly prevalent in sectors such as transportation and delivery services, where the platform plays a more direct role. Additionally, 56.5% of workers report that the platform determines their remuneration, a figure that has remained relatively stable over the past three years. This highlights the significant control platforms exert over payment structures and amounts.

Customer relationship and the possibility of creating a customer portfolio: 46.1% of platform workers report that they usually know the final recipient of their work, although this proportion has decreased in recent years. Women, workers over the age of 36, and those engaged in marginal or secondary platform work have more limited access to final customers. In contrast, primary workers have access in 66.7% of cases. Regarding the ability to use these contacts to build their own client portfolios, platforms restrict this possibility in 26.8% of cases. Among primary workers, this restriction rises to 68%.

Reputational system: 43% of workers perceive frequent abuse in customer rating systems, although this figure has dropped sharply compared to previous years. Such abuse is most commonly reported in the non-professional sector and among employees.

"These characteristics highlight a framework of conditions where platforms exert significant control over workers. While free access has increased compared to previous years, a third of workers still have to pay to work. Autonomy in task selection remains highly restricted, and nearly half of workers report insufficient access to communication and grievance channels. Additionally, quality controls and constant monitoring have intensified, further reinforcing platform surveillance. However, other forms of control, such as dress codes and restrictions on subcontracting, have diminished.

Most workers now receive their remuneration directly from the platform, which also determines the payment rate in more than half of cases, underscoring its influence over working conditions. Lastly, although abuse in rating systems has declined, it continues to negatively impact a significant number of workers."

Motivations for working on digital platforms

Motivations for flexibility: Most workers on digital platforms value flexibility in their work, particularly regarding hours and workplace. Temporary flexibility ranks third in the list of motivations, with almost 80% of respondents identifying it as an important factor. The ability to choose one's workplace is slightly less valued this year, ranking fifth, although it remains significant for workers over 36 years old and those in urban areas. Related to this, work-life balance is also an important consideration. Platform work as a tool for improving work-life balance ranks sixth, being especially appreciated by those over 36 and those engaged in marginal or secondary activities. The availability of leisure time is another notable factor, ranking fourth, and is particularly valued by women and urban dwellers.

Economic motivations: Economic reasons remain a prominent driver for platform work. The motivation of "obtaining good income as a main activity" has risen to second place in the ranking, showing a notable improvement compared to the previous year. The potential to supplement primary income and the need to "survive and get ahead" have also gained importance. In fact, when respondents were asked to prioritise their motivations, these two ranked highest, reflecting an increasing perception of economic necessity among workers.

Professional motivations: "Interesting work" continues to be the most widely accepted motivation among platform workers, cited by over 82% of respondents. This indicates that, beyond economic needs, platform work offers intrinsic value by being stimulating or personally rewarding. However, motivations related to professional development—such as networking or gaining experience to access better opportunities—rank lower than in previous years. This decline suggests a decreasing perception of platforms as avenues for professional growth.

Autonomy and control: Significant limitations persist regarding workers' ability to control their tasks and schedules. Only 46.5% of workers report being able to accept or reject tasks, and fewer than half can regularly decide their work schedules. While two-thirds of workers are satisfied with the number of hours they work, a considerable proportion wish they could work more.

"An analysis of platform work motivators reveals that workers prioritise economic needs, such as "surviving and getting ahead" and "supplementing income from the primary activity." These are followed by leisure time and flexibility in terms of workplace and working hours, which were the top priorities in previous years.

On a broader level, intrinsic factors, such as an interest in the work and general flexibility, remain important. Older individuals, those living in urban areas, and workers with intermediate levels of education place greater emphasis on these aspects. The changing priorities of platform workers call for ongoing analysis to better understand the preferences and needs of various groups within this workforce."

Stress, occupational risks and satisfaction

Sources of stress: The primary sources of stress for digital platform workers are insufficient training and digital skills, difficulty disconnecting outside working hours, and changes in working conditions over which they have no control. The need for better general training and improved digital skills ranks as the top two stressors, identified by more than half of the respondents. Other significant stress factors include a lack of work-life separation, limited control over working conditions, and inadequate emergency support. Social interactions and risks to physical and moral integrity are also notable sources of stress but rank lower in importance.

Risks arising from insufficient control: Platform workers face several stress-related risks due to limited control and insufficient training. A total of 57.1% report requiring more general training to perform their work effectively, making this the leading stress factor. Similarly, 55.5% believe better qualifications in digital skills are necessary, a concern particularly pronounced among those engaged in non-professional activities. This lack of tools and skills not only hinders their work but also negatively affects their mental health. Additionally, 53.4% feel powerless to influence changes in their working conditions. While external control over work has decreased in its impact, it remains significant, especially for workers with higher levels of education.

Risks arising from disconnection: Over 54% of workers struggle to disconnect from their jobs outside working hours. This percentage has risen compared to the previous year, suggesting increasingly blurred boundaries between work and personal life on digital platforms.

Risks derived from lack of assistance: The absence of effective emergency support is the fifth most significant source of stress, with 48.7% of workers expressing doubts about receiving assistance in critical situations. This persistent concern undermines their sense of workplace safety. The issue is more acute among highly educated workers, highlighting the urgent need to improve emergency protocols.

Risks arising from social interactions: Social isolation affects 47.5% of platform workers, reflecting the limited interpersonal contact inherent in this type of work. Additional stress factors include constant customer evaluations, which impact 42.6% of workers, and strained relationships with customers, reported by 45.2%.

Risks to physical and moral integrity: Although less frequently reported, risks to physical and moral integrity are severe. Approximately 40.8% of workers report experiencing aggression, health issues, or accidents. These risks are highest among young workers and those with higher education levels, who also report elevated risks of sexual harassment and health problems such as back pain or depression.

Unconventional hours and long hours: Although working outside conventional hours remains common for platform workers, the frequency of night shifts, weekend work, and extended hours has decreased compared to the previous year. However, 76.7% still work at night often or occasionally, 53.1% regularly work weekends, and 36.7% work shifts exceeding 10 hours. These atypical schedules continue to significantly impact the personal lives of platform workers.

Job satisfaction: Overall satisfaction with platform work has slightly increased compared to previous editions, with an average rating of 7.13 on a scale of 0 to 10. Nevertheless, 30% of workers continue to report low satisfaction levels (below six points). Workers aged over 36, those living in urban areas, those with higher education, and those engaging in platform work as a secondary activity tend to report higher satisfaction levels.

"Digital platform workers experience various sources of stress, primarily linked to insufficient training in both digital and general skills required for their tasks, difficulty disconnecting from work outside working hours, and limited control over changes in their working conditions. Additional significant stressors include a lack of emergency support and the infrequency or absence of social interactions with colleagues and clients.

Although less common, risks to physical and moral integrity, such as aggression or health issues, remain serious concerns. Furthermore, although, reduced, unconventional schedules and long working hours continue to characterise platform work.

Job satisfaction has improved slightly, with higher levels reported among older workers, those living in urban areas, and individuals with higher education levels."

Job Search & Career Outlook

Finding the first job on platforms and when they accessed it: The majority of platform workers (33.1%) found their first job through informal networks, such as family, friends, and acquaintances. This was followed by 29.9% who accessed their first job via online job portals, and 19.3% who used social networks such as LinkedIn. Formal channels, including public employment services, accounted for only a small proportion, highlighting the limited role of these services in this type of employment.

This year, there has been an increase in the use of informal networks, while reliance on social networks for securing the first job has declined. Regarding the timing of entry into platform work, 37.7% of workers have been in this type of employment for two years or less, and a third (33.4%) entered during the pandemic period, from March 2020 to March 2022. These figures suggest that the digital platform workforce is relatively young.

Job search today: The vast majority of platform workers (82.4%) are still seeking employment, a figure similar to the previous year. Among these, 25.4% aim to expand their work on their current platform, while 43.4% are exploring opportunities on other platforms, indicating a strong tendency to remain within the digital work environment. However, 23.9% are considering jobs outside of platforms, with this option being more common among women and those in professional occupations.

Preferences and future prospects: The preference for salaried employment has risen significantly, with 63.6% of workers expressing this preference, compared to 28.7% who favour self-employment. Regarding career development, 51.1% believe their professional future will remain linked to platform work, although this percentage has decreased compared to last year. Workers in non-professional occupations are the most likely to foresee their future on platforms.

Overall assessment after starting on platforms: For 40.8% of respondents, their employment situation has improved since starting platform work, particularly among self-employed workers and those living in urban areas. However, 50.7% report no significant change in their situation, and 6.5% perceive a worsening. This indicates that while platforms provide opportunities, not all workers experience substantial benefits.

The majority of platform workers found their first job through informal networks, while only a small minority used public employment services. For many, entry into platform work has been recent, with the vast majority starting from 2020 onwards. At present, 82.4% are still seeking employment, primarily within the digital platform sector, although 23.9% are also exploring opportunities outside it.

There is an increasing preference for salaried employment and a slight decline in the perception of platform work as a long-term career option, particularly among those in non-professional roles. While 40.8% of workers report an improvement in their employment situation since starting platform work, more than half have observed no significant changes. This highlights that, although platforms provide opportunities, they often fail to fully meet the expectations or needs of workers, reinforcing the idea that many current platform workers view it as a form of shelter employment

RECOMMENDATIONS FOR PUBLIC ADMINISTRATION

Learn More

The data continues to highlight a significant lack of training for platform workers. We recommend that LABORA prioritise platform workers to help them improve their employment prospects and develop the skills necessary to take on a greater variety of tasks. Training should be tailored specifically to platform work, encompassing not only digital skills but also knowledge and experience in enhancing digital reputation and securing more assignments.

Job Search

The data consistently shows that platform workers are actively seeking employment. LABORA could address this by implementing specific job orientation programmes tailored to the needs of platform workers.

Adaptation to the European Directive

The European directive on work within digital platforms seeks to ensure the employment of platform workers through a legal presumption of employment for those meeting specific criteria. However, the data reveals that the sector still comprises a significant number of self-employed individuals and other non-salaried employment arrangements. LABORA should therefore support both companies and workers in adapting to the requirements of the new Directive.

2024