



2022-2023
**ANNUAL
PROGRESS
REPORT**

dpia

DIGITAL
PLATFORMS
INDUSTRY
ASSOCIATION

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About DPIA

DPIA was established in 2022 as a result of a collaborative effort by Deliveroo, foodpanda and Grab to enhance best practices among delivery partners and merchants. It aims to shape and strengthen the industry's standards and policies, in line with Singapore's values and practices.

Our Mission

To be a key contributor to the growth of Singapore's digital economy and play an enabling role in standardising frameworks, guidelines and policies that support a thriving innovation ecosystem.

To distil industry best practices to the broader region and beyond.

Our Vision

To deliver market best practices which unlock the benefits of a sustainable and thriving gig economy.

Our Members



deliveroo



foodpanda



President's Foreword



Jason Parke
DPIA President

The digital platform economy in Singapore has seen significant growth and changes over the years, but one thing that has remained constant is the continued resilience and enthusiasm of all stakeholders committed towards the realisation of our collective dream of an inclusive platform economy that serves everyone. With this in mind, I am pleased to present the inaugural edition of our Annual Progress Report (APR), a reflection of the milestones we have achieved since our inception in 2022.

Initially starting off as a collaboration, Deliveroo, foodpanda and Grab worked together to collectively address shared issues relating to our rider partners and merchants, many of whom multi-home across digital platforms. DPIA was later formally established to leverage on the vast expertise of three major digital platform companies in Singapore to establish industry best practices and drive solutions that champion the perspectives of all stakeholders within the digital platform ecosystem.

This past year has been saddled with geopolitical and socio-economic uncertainties as the world emerges from a global pandemic. As a young association, DPIA has taken many ambitious steps towards enhancing customer experience, fuelling innovation, raising industry standards and building meaningful partnerships, all while balancing the needs of various stakeholders across the digital platform value chain and the larger ecosystem. The digital platform industry is a relatively new space that is rapidly evolving, and we are excited to be at the forefront of these changes!

In commemoration of one year since our inception, this report takes stock of all our initiatives and partnerships thus far, as well as outlines our next steps and future areas of focus. Published within this report, I am also proud to celebrate DPIA's successful conclusion of the DPIA Survey (Partners), where over 9000 delivery and ride-hail partners have shared their experiences and perspectives on their aspirations, ambitions and issues that impact them. We would like to thank our partners for their trust and for taking the time to share their feedback with us. These are valuable insights that can help us improve the platform economy and its experiences for you.

Moving forward, DPIA hopes to continue proactively strengthening our existing relationships and partnerships while forging new ones to create a robust network. By doing so, we hope to be able to bring together different expertise and resources for impactful initiatives and practical solutions.

I would like to extend my deepest appreciation to our partners, merchants, public agencies, non-profit organisations, academics, as well as other digital platform companies for their continued engagement and support.

Thank you for being an integral part of our journey! We look forward to more communication, innovation and collaboration as DPIA works towards leading change and creating a resilient and sustainable digital platform industry in Singapore.

About the

DPIA Survey (Partners)

9196

responses

The DPIA Survey (Partners) was conducted between 2-15 August 2023, garnering a total of 9,196 responses.

Our objective was to understand **why our partners engage in the work that they do, the value they find in this work and their experiences as a partner.**

The survey is also a follow-up to the Cross-Platform Industry Survey (CPIS) that was held in March 2022. This time, it was expanded to also include partners who offer ride-hail services.

Overall, we found that the platform economy is **diverse and vibrant**, adding both colour and resilience to Singapore's national economy.

Platform work offers every worker a simple set of well-defined premises - flexibility with a straightforward value proposition of take-home income. It is natural that these continue to be things that platform workers prioritise.

Despite challenges that they face in their chosen line of work, especially situations where they experience difficulties interacting with other users of the platform economy, platform workers enjoy their work for the most part, whether it be for the work itself or for the benefits that the work brings to their lives.

Key motivations for choosing platform work:

52.3% Flexibility

35.9% Important source of temporary/ supplementary income



Findings of the DPIA Survey (Partners)

Who are our platform workers and why are they here?

The Platform Economy and Platform Workers are Diverse

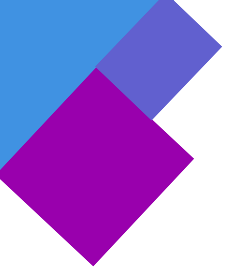
The platform economy plays a significant and valuable role in Singapore's economy. According to the e-Economy SEA 2022 report for Singapore, the gross market value of the platform economy is on track to hit around US\$30 billion (S\$40.8 billion) by 2025, with strong continued growth overall. Combined, food delivery and ride-hail/transport are set to grow at a compound annual growth rate (CAGR) of 17%, providing valuable opportunities to many workers.

The platform economy is also a shock absorber, as could be seen during the COVID-19 pandemic. The platform economy remains a lifeline for society during unexpected economic disruptions - for merchants who need to reach customers, for individuals who need a source of income and for consumers who need access to basic necessities such as food and healthcare.

Currently, there are an estimated 88,400 platform workers in Singapore. Given the dynamic nature of the platform economy and accessibility of platform work, there is no one type of platform worker. The survey found that platform workers have diverse aspirations and relationships with their platform work, and therefore have different experiences that need to be accounted for as the sector grows. We have derived four different platform worker archetypes, based on our findings on how long platform workers anticipated they would stay in platform work, how much time they spend on platform work per week, the portion of their income obtained through platform work and their current or previously held primary occupation.

The diversity in these ways of working amongst our partners attests to the adaptability and capacity of the industry to accommodate diverse circumstances in each individual's unique stage of life, and more importantly, the variance in what platform workers look for. Platform workers have thereby harnessed the flexibility, autonomy and income potential that platform work offers to shape their own lives. Furthermore, our survey has revealed that platform workers are certain about the place that platform work has in their lives and their career trajectories.

Findings of the DPIA Survey (Partners)



Opportunists

Opportunists often pursue platform work alongside their careers. Platform work does not play a big role in their lives, and many write that they are only in platform work for as long as earnings justify time spent. 99.2% of Opportunists do platform work on a less frequent basis, and only 8.4% earn most of their income from it. Additionally, 41.2% intend to continue platform work alongside their main forms of work for the foreseeable future, of which 25.3% indicated plans to stay on for more than three years. There were also Opportunists who found it difficult to engage in traditional employment as a result of other commitments they were bound to, such as caregiving. No matter what their actual situation, those within this group found the material rewards of platform work intertwined with the flexibility of the work the most compelling part of the deal.



Switchovers

Switchovers have seen both regular work and platform work, and have decided that they prefer platform work. Whether they are retirees, on a sabbatical, or are in this for a longer period of time, platform work represents an alternative way of life that still offers enough to get by. Switchovers particularly value the flexibility conferred by platform work, and were the most likely to report that they appreciated the working conditions of platform work as compared to their previous occupations. 52.6% of Switchovers reported plans to work in platform work beyond three years. Those in this group tended to engage in platform work more regularly and also earn most of their income through it.

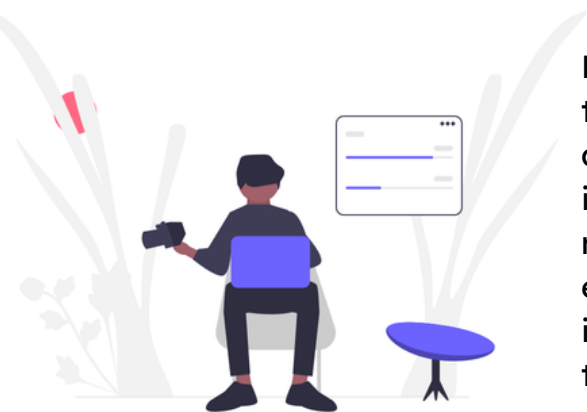


Profiles of platform workers are based on cluster analysis of survey results.

Findings of the DPIA Survey (Partners)

Hustlers

Hard-nosed workers who have strong ambitions, many within this group wrote about their grand ambitions such as funding a great venture they are passionate about or gaining financial independence. 96.7% indicated that they engage more regularly with platform work, and 68.6% indicated that they earned most of their income from it. While they are primarily in platform work for the income, they are more committed than other groups to platform work, both on a weekly basis and in the long term. For them, platform work represents a means of securing their dream.



Explorers

Compared to the other archetypes, explorers are less committed to platform work - they put in as much as they need to give them the space and latitude to discover themselves. Nearly half of this group (49.2%) were either students, retirees or on a break. 95.8% earn most of their income from platform work, while only 6.6% appear to be engaged in traditional working arrangements. Many wrote that they work independently in other contexts, are looking for a niche that they enjoy, or are in training/education to fit themselves into that niche.



Profiles of platform workers are based on cluster analysis of survey results.



DPIA Survey (Partners)

What do platform workers want?

Platform Workers Prioritise Take-home Pay and Flexibility; Day-to-day Operational Challenges still a Key Pain Point

Motivations for participating in platform work

Our findings reveal an emerging consciousness of platform workers finding self-purpose and fulfilment in their work. But platform work is often still more than a means to an end.

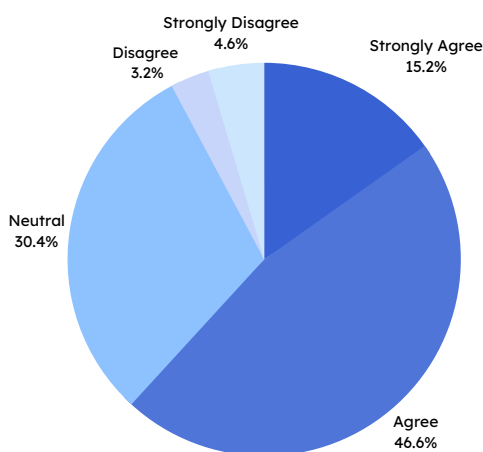
When it came to extrinsic motivations, while overall 35.9% of respondents indicated that income was a key motivator, Switchovers were more likely to report that platform work provided them with higher earnings than previous occupations, while Opportunists and Hustlers tended to view the income as temporary or supplementary. Flexibility, while appealing across the board, was most appealing to the Switchovers (58.5%) and least important to the Opportunist (48.1%).

While their motivations for engaging in platform work remain varied, most (92.2%) platform workers were amenable to platform work, of which 61.8% surveyed indicated enjoying platform work in and of itself. These findings are similar to the findings from the CPIS, which reflects the continuation of strong, positive sentiments towards platform work.

Key Information

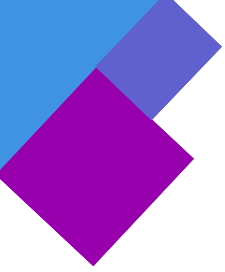
- **61.8%** of platform workers surveyed enjoy their platform work in and of itself.
- **53%** of platform workers viewed platform work as important to their career pathway.
- **53.2%** of platform workers are satisfied with platform operators they work with.
- **35.9%** of respondents indicated that income is a key motivator.

Do Platform Workers Enjoy Platform Work?



Source: DPIA Survey (Partners)

<i>I am attracted to...</i>	Opportunists	Switchovers	Hustlers	Explorers
Platform work as a source of temporary income	29.3%	9.4%	16.2%	14.2%
Platform work as a source of supplementary income	43.3%	14.5%	28.5%	20.9%
Platform work as a source of higher income	12.2%	25.5%	16.6%	15.1%
Platform work's flexibility	48.1%	58.5%	56.2%	55.1%



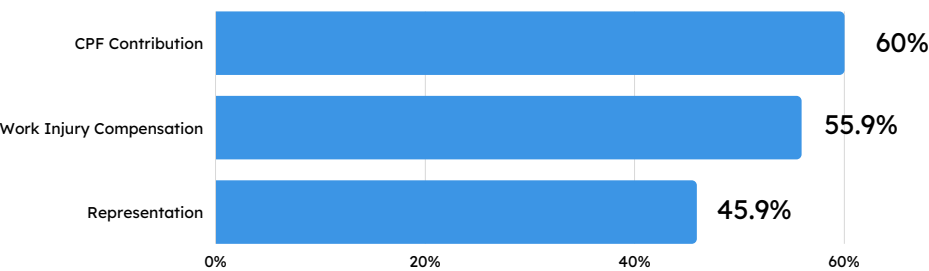
Findings of the DPIA Survey (Partners)

Policy changes surrounding platform work

The concerns about compulsory CPF contributions (60%) and how work injury compensation will take place (55.9%) reveal that platform workers' primary concerns about platform work are ultimately bread-and-butter ones that have a direct impact on their day-to-day lives and livelihoods as platform workers. This is especially true for those with more consistent commitment to platform work: Switchovers were the most concerned about how CPF contributions (66.8%) and work injury compensation (60%) would affect them on a personal level.

31% of platform workers have indicated that they intend to continue platform work at least irregularly in some form as long as their take-home pay remains competitive and practical in meeting their needs. At the same time, platform workers of all backgrounds have raised concerns regarding the tangible impact that these policies will have on their lives and earnings. Policy changes should consider implications on their needs as well, and there needs to be continued engagement and communication in order to help platform workers better understand these implications.

Concern with Pillars of ACPW Recommendations



Source: DPIA Survey (Partners)

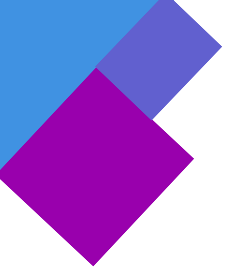
What Platform Workers Want

81.4% of our partners agreed that platform workers should be treated with more respect. When asked to elaborate, many of them noted difficult treatment from other stakeholders like merchants, consumers and other third-parties or unrelated individuals.

More respect needed for platform work

About 25% of platform workers felt that they were not sufficiently respected in their line of work. While 38% felt respected overall, 81.4% indicated that platform workers should be treated with more respect. Being a platform worker comes with its own set of challenges, many of which are experienced on a day-to-day basis.

Challenging situations ranged from drunk and rowdy passengers to users who requested contactless delivery without providing adequate space for such delivery at their doorstep. Some reported that merchants did not allow them to enter the premises while also not providing a comfortable waiting space, leading to them having to stand outside a store, sometimes in the rain, for a long period of time. There are also many reports of difficult interactions with facilities management staff of private residential and commercial buildings. Even with platform companies working to resolve issues which are unforeseen and tricky to fix at scale, and community efforts underway to smoothen the friction between platform workers and the rest of society, more can certainly be done by all stakeholders.

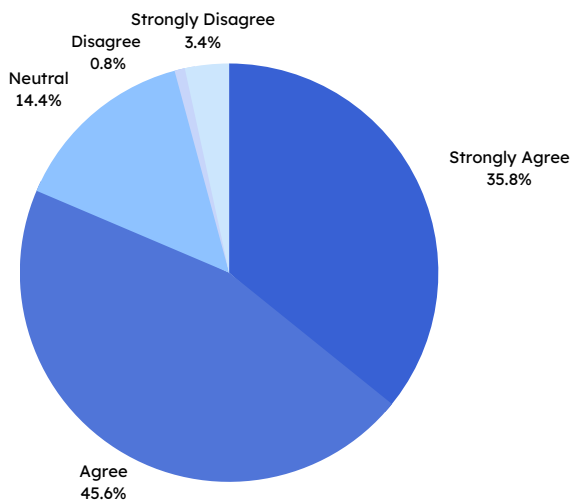


Findings of the DPIA Survey (Partners)

While this sentiment was felt across all groups of platform workers, Switchovers were most likely to feel that respect for platform work and platform workers in society is lacking. Opportunists, on the other hand, were the most likely to be neutral on questions surrounding their view on societal respect for them; it appears that the economic benefits of platform work are of paramount importance to them. Aside from take-home pay and safety, platform workers' priorities and concerns mainly lie in other areas that have not yet been sufficiently acknowledged and addressed, such as the aforementioned paucity of kindness and consideration that would make a significant improvement in their quality of life and work.

Platform workers also noted that challenging behaviour on the road from other users was commonplace and very often endangered their safety. While challenges on the road are not unique to platform workers, the frequency at which platform workers are on the road places them at increased risk when it comes to bad road user behaviour.

Should Platform Workers be Treated with More Respect?

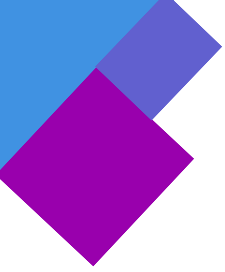


Source: DPIA Survey (Partners)

Singapore has been working on elevating the value we place on service workers whose status as essential workers was first spotlighted during the peak of the COVID-19 pandemic. It is likely that the unidimensional portrayal of platform work and platform workers has led to the sidelining of the views and unique experiences of platform workers.

Unfortunately, platform workers are not the only service workers who face issues in their day-to-day work. Public attitudes towards them tend to be a toss-up between a lack of consideration, and concerns that, while well-intentioned, remove agency from platform workers by disregarding their choice to engage in platform work. For instance, a number wrote that they did not feel comfortable admitting to their families that they were engaged in platform work out of fears of being seen as failing expectations.

More needs to be done for platform workers to do their work smoothly and with dignity and respect. Many respondents wrote that they enjoy bringing a smile to peoples' faces, and their days would be made better with a smile back.



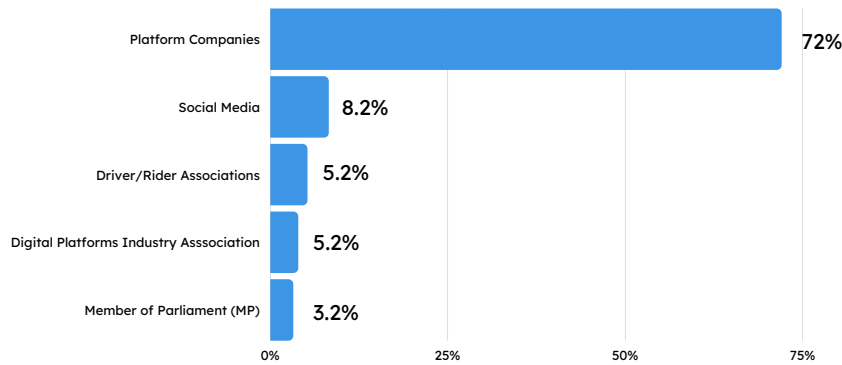
Findings of the DPIA Survey (Partners)

What can consumers, government bodies, merchants and platform companies do to better the lives of platform workers?

Supporting the Platform Economy is a Whole-of-Society Effort

DPIA members have established protocols and channels to ensure timely and prompt assistance is given to our partners on the job. Platform companies remain the go-to option for assistance for the majority of our platform workers (72%) when they have any disputes. Platform workers are also generally happy with platform companies' operations and their response times on issues, although 18.7% reported disagreements with platforms' handling of issues. This survey has given us an opportunity to receive feedback on how DPIA members can continue to support and empower our diverse community of partners.

Who do Platforms Workers Approach for Support?



Source: DPIA Survey (Partners)

As evidenced by our findings, the platform economy is uniquely diverse. DPIA and its members take pride in supporting the myriad of dreams and aspirations our partners have. Our members curate educational and upskilling programmes to allow for our platform partners to develop skills they want to hone.



Deliveroo supports partners and their families through their OpenClassroom programmes and scholarships to ensure that they can pursue their dreams.



foodpanda helps make learning accessible for partners with bite-sized online courses on Gnowbe, a mobile learning platform.



Besides GrabAcademy which provides a one-stop training and upskilling portal for partners, Grab also awards scholarships for local universities and bursaries to outstanding children of their driver and delivery partners since 2018. This year, funding has been expanded by 45% to also include bursaries for students from the primary to tertiary levels (Institute of Technical Education, Polytechnic or Junior College)



Findings of the DPIA Survey (Partners)

Nonetheless, supporting the platform economy requires a whole-of-society approach, and stakeholders beyond platform companies also need to play a part. For example, our partners' safety remains at the heart of our operations. However, given the non-traditional and dynamic environment of platform work, platform companies' ability to ensure partners' safety on the ground remains limited. DPIA is currently working with the relevant bodies to find operationally sustainable solutions to some of these issues. In parallel, members seek to strengthen protocols and mechanisms to ensure our partners' safety.

As voiced by respondents, much more also needs to be done to protect the dignity of our partners. DPIA and its members endeavour to lead this much-needed change.



Deliveroo has partnered with the Singapore Cycling Federation and ComfortDelGo to provide ongoing defensive riding training workshops throughout the year. The company also provides their riders with a global safety app, Flare, with complimentary premium access to information like incident detection and danger hot spots as well as alerting nearby riders to RoadRadar drivers (such as drivers of trucks, lorries and cars) when fellow Deliveroo riders are nearby.

Grab collaborated with the Land Transport Authority (LTA) and the Singapore Civil Defense Force (SCDF) on their Be Device-Safe Roadshow 2023 on safe charging and advisory against illegal modifications of powered-assisted bicycles. Two Grab delivery partners even participated in the roadshow to promote the safety messages on the use of power-assisted bicycles to fellow delivery riders.



foodpanda has also partnered with the LTA to engage and educate delivery partners on road and device safety through interactive games and prizes at rider events.

foodpanda has launched multiple campaigns to encourage consumers to show appreciation for delivery partners through tipping. foodpanda also organises annual pandarider awards ceremonies to recognise and commend the exceptional contributions made by our hardworking platform partners.

Conclusion

There is a place in the platform economy, and in broader society, for all platform workers, regardless of who they are, what they get out of it or why they got into it in the first place. While there are discussions on protections for platform workers both at a national and global level, Singapore as a community can also afford to be more ambitious in championing a platform economy based on mutual respect and compromise. DPIA commits to this objective and calls on like-minded partners to work with us to push for a better platform economy.

Looking Back: DPIA Thus Far



SEPTEMBER 2023:

Ministry of Manpower (MOM) Public Consultations

- DPIA welcomes MOM's endeavour in defining 'platform operators' and 'platform workers', and establishing safeguards for our platform workers, which are critical in ensuring regulatory clarity and a level playing field in the wider platform economy.
- DPIA looks forward to continuing productive dialogues with MOM and the relevant stakeholders in furtherance of our collective goal of fortifying the safety and health of our partners.



JULY 2023:

Statement On The Report Of The Tripartite Workgroup On Representation For Platform Workers (TWG)

- The TWG released their report on the recommendations for representation for platform workers, which aligns with DPIA's views on valuing platform workers' contributions and their voice in our business operations.
- DPIA members will strengthen their existing mechanisms to frequently seek feedback from partners to continuously improve operations and address key concerns they may have.



JANUARY 2023:

Launch of Singapore Standard (SS) 687: 2022 (Guidelines for food e-commerce)

- In a joint effort by the Singapore Manufacturing Federation (SMF), Singapore Standards Council (SSC), Food Industry Asia (FIA) and Singapore Food Agency (SFA), DPIA members were part of a working group that provided insights and support in the formation of guidelines for food e-commerce in Singapore.



FEBRUARY 2023:

DPIA Launches Industry Code of Practice (COP)

- While the industry is supportive of the government's efforts, DPIA can and is working towards self-regulation and managing the needs of all stakeholders.
- In its first edition, DPIA's COP is a first-of-its-kind tool for digital platforms in Singapore.
- Other industry players beyond DPIA's members came together to develop a set of self-regulatory standards, focusing on the areas of merchant development, as well as safety, support and development for our partners.

Looking Back: DPIA Thus Far



DECEMBER 2022:

Urban Redevelopment Authority (URA)
-Land Transport Authority (LTA)
Advisory Note

- DPIA engaged with URA and LTA during the development of the Advisory Note to Facilitate Safe and Efficient Delivery Pick-Ups at Commercial Malls.
- DPIA members contributed through consultations to address concerns our rider partners have raised in individual and industry-wide feedback sessions.

Workplace, Safety and Health (WSH)
Guidelines

- DPIA considers partner safety to be a priority, and is committed to championing platform workers' safety.
- DPIA was part of the workgroup that contributed to the development of the Workplace Safety and Health Council (WSHC)'s WSH Guidelines for Delivery Services Industry.



NOVEMBER 2022:

Advisory Committee On Platform Workers' (ACPW) Recommendations
On Strengthening Protections
For Platform Workers

- DPIA welcomed the ACPW's recommendation across a variety of key considerations, having provided inputs during interactions with the ACPW.
- The recommendations are in line with our members' ongoing efforts to improve partners' well-being and safety.



MARCH 2022:

Launch of
Cross Platform Industry Survey (CPIS)

- CPIS held from 4 to 17 March 2022 in Singapore.
- 4,212 rider partners across various age groups responded, making it the biggest survey on platform workers in Singapore at the time.
- The survey was a way for DPIA to receive feedback on rider partners' pain points, sentiments and priorities.

Looking Ahead: DPIA's Next Steps

DPIA hopes to continue expanding and deepening our engagements with various stakeholders throughout the whole platform economy.

The two surveys DPIA has conducted so far have equipped us with more information needed to discern the top priorities of our food delivery and ride-hail partners. The information will also be useful in engagements and exchanges with external stakeholders to allow for a better understanding of the needs of the industry. Balancing the needs of all stakeholders across any industry is challenging, and the platform economy is no exception; credible on-the-ground information is key. We hope to continue this effort through a better understanding of the unique perspectives and needs of other key actors in the platform economy, including merchants and consumers.

DPIA respects the value each stakeholder has in the industry, and also hopes to explore collaborative opportunities in the areas of safety and upskilling for our partners, digitalisation for merchants and environmental sustainability.

As food delivery and ride-hailing services become an essential part of our everyday lives, more general awareness of how the digital platform industry functions would allow for greater understanding and respect for all stakeholders within the industry as well as encourage more productive conversations that can lead to better outcomes for all.

Stay Connected!

Reach out to us at:

