

Wolt Courier Partner Study

Denmark, August 2021

Wolt
Voxmeter 



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INTRODUCTION

Purpose of the study

This study has been conducted by Voxmeter A/S on behalf of Wolt Denmark.

The research aim is to generate more knowledge of how courier partners experience their collaboration with Wolt. On that basis, the study does, among other things, provide insights into the following themes.

- What factors matter when choosing their job and affiliation within the job market?
- What is their affiliation with Wolt?
- How do they characterize the pros and cons in their cooperation with Wolt?
- What work values and preferences do they have?

In extension to that, the results will be analyzed in the light of background data on age, gender, nationality, city, vehicle, earnings, secondary employments, insurances and seniority.

Method

The analysis is based upon 1.512 questionnaire interviews with courier partners at Wolt Denmark, conducted between the 6th of June and the 6th of August 2021. The survey was sent to 9.079 respondents of which 4.000 are estimated to be active courier partners. In total, 1.512 courier partners completed the survey, which corresponds to a response rate of 38 %. Based upon Voxmeter's experience, this response rate is at the same level as response rates in other companies.

For further information, see the method section, page 57.

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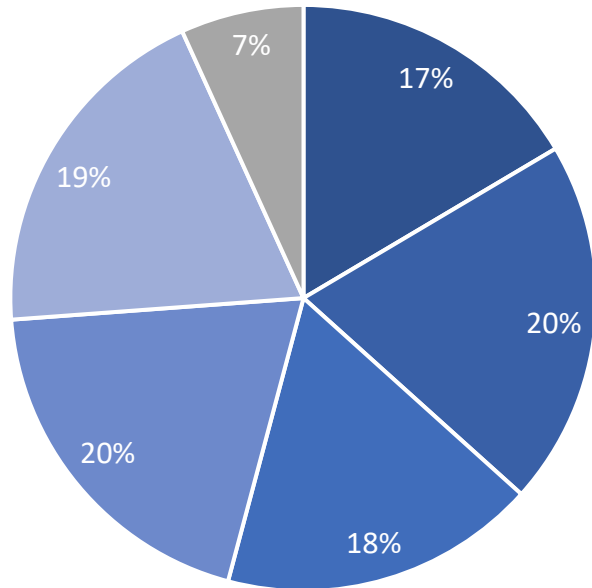
DEMOGRAPHY



DEMOGRAPHY

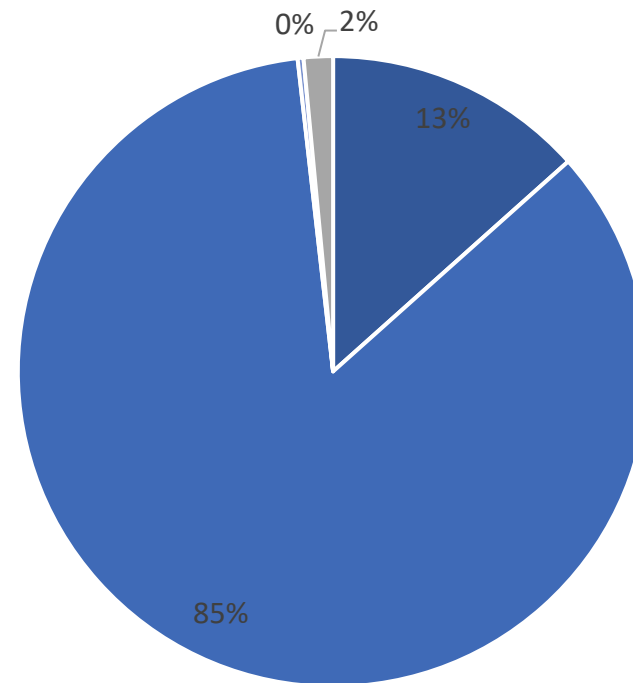
Age and gender

Age



- 18-21years
- 22-25years
- 26-29years
- 30-35years
- Over 35years
- Don't want to answer

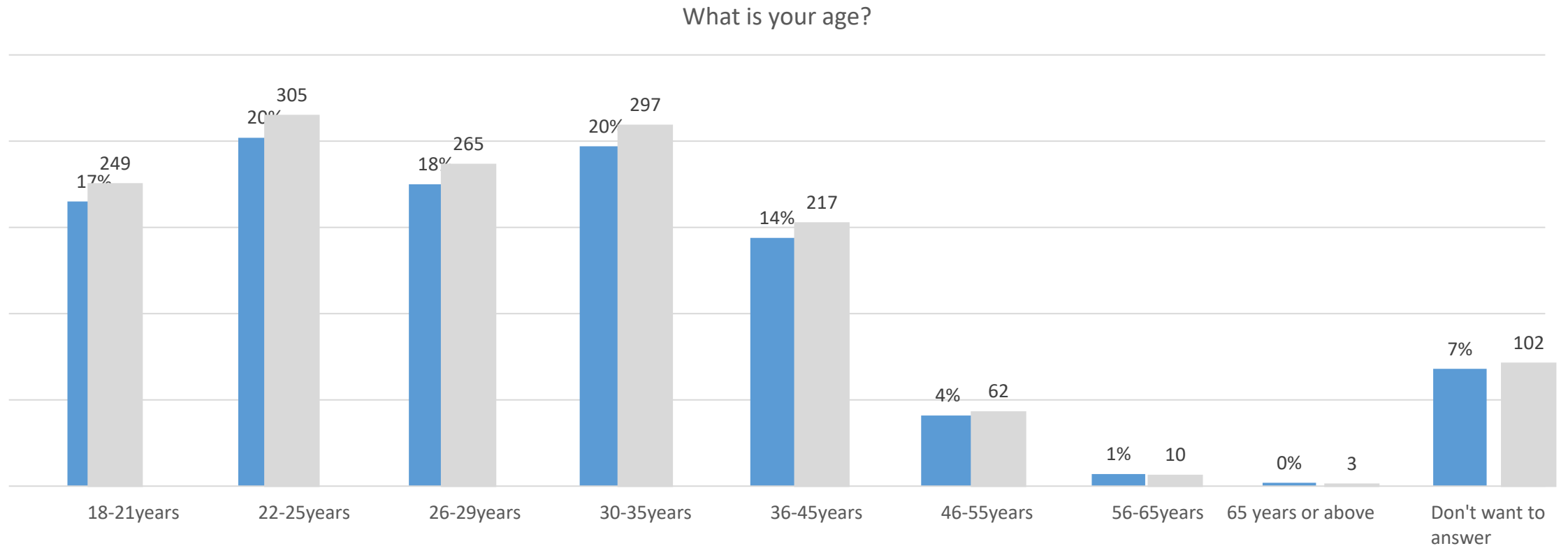
Gender



- Female
- Male
- Other
- Don't know / Don't want to answer

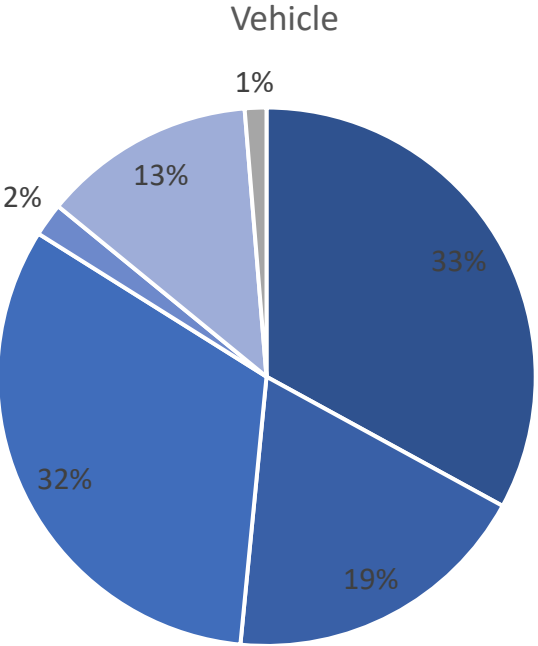
DEMOGRAPHY

Age among courier partners with a Danish work permit nationality

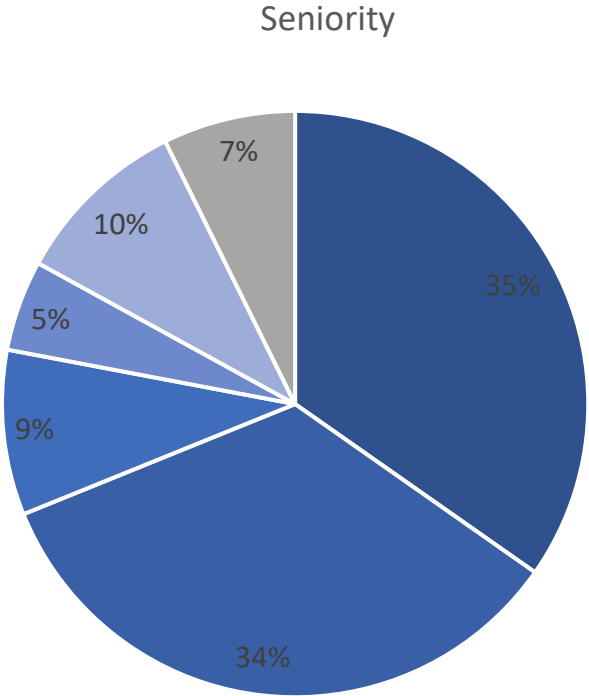


DEMOGRAPHY

Vehicle and seniority



- Bike
- Electrically powered bike
- Car
- Motorcycle
- Scooter
- Other, please note:

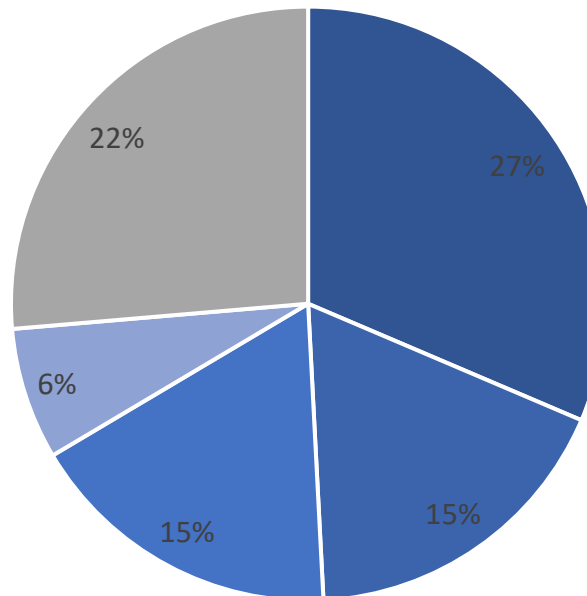


- Below 6 months
- 6-11 months
- 12-17 months
- 18-23 months
- 1 year or above
- Don't know

DEMOGRAPHY

Income

Average income (every 2 weeks)

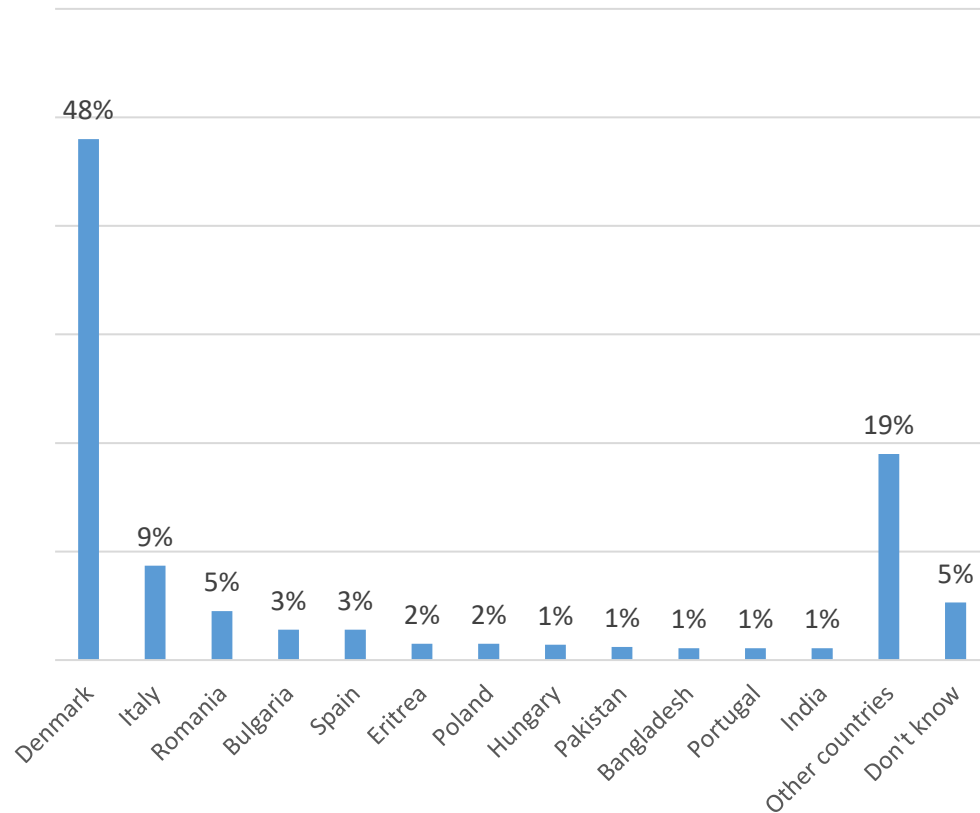


■ Below 5000 Dkk ■ 5000-9999 Dkk ■ 10000-15000 Dkk ■ Above 15000 Dkk ■ Don't know

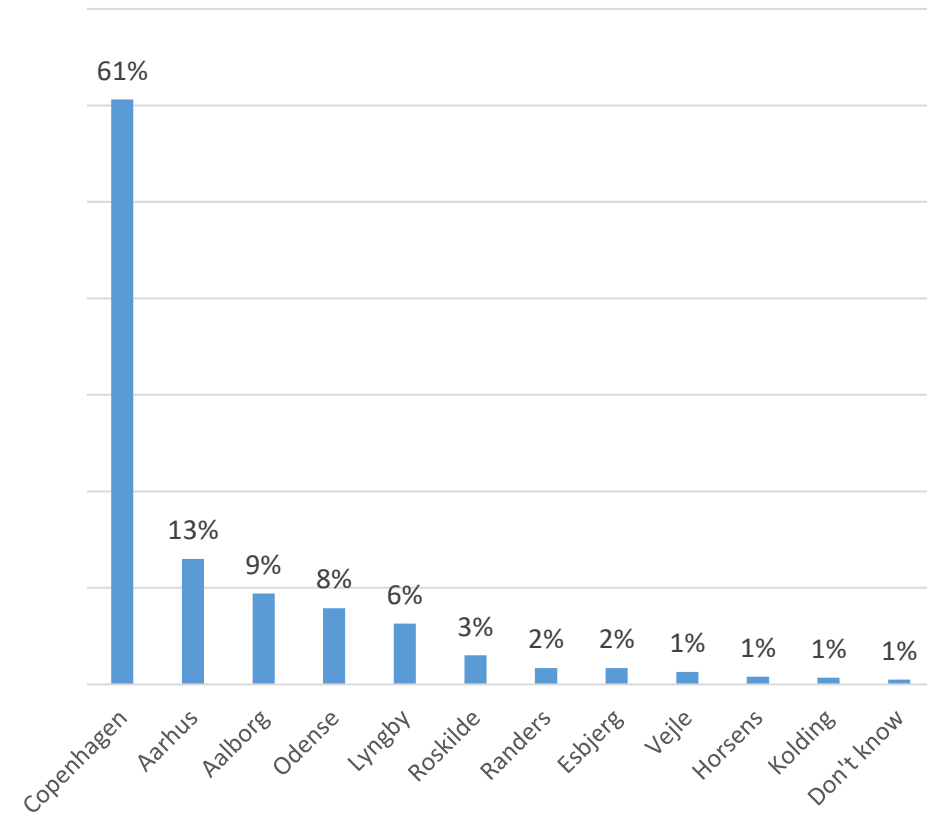
DEMOGRAPHY

Nationality and city

Work permit nationality

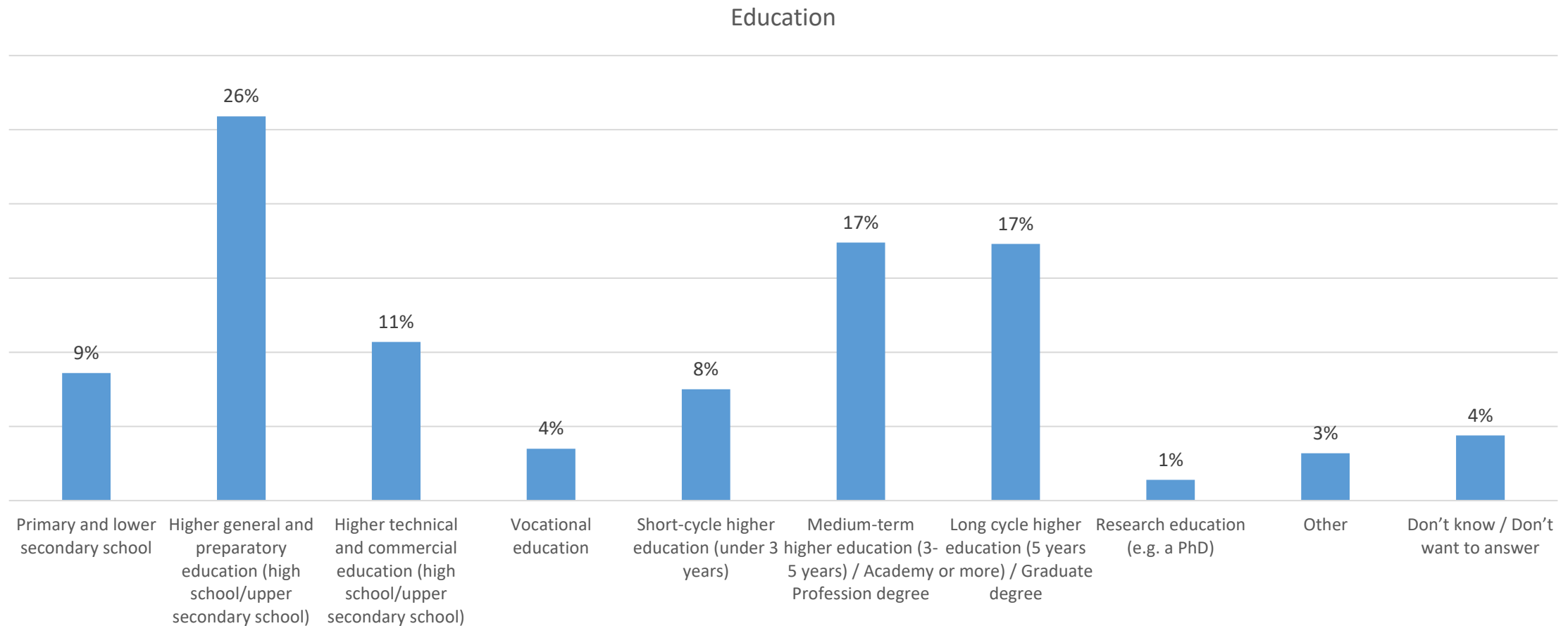


City



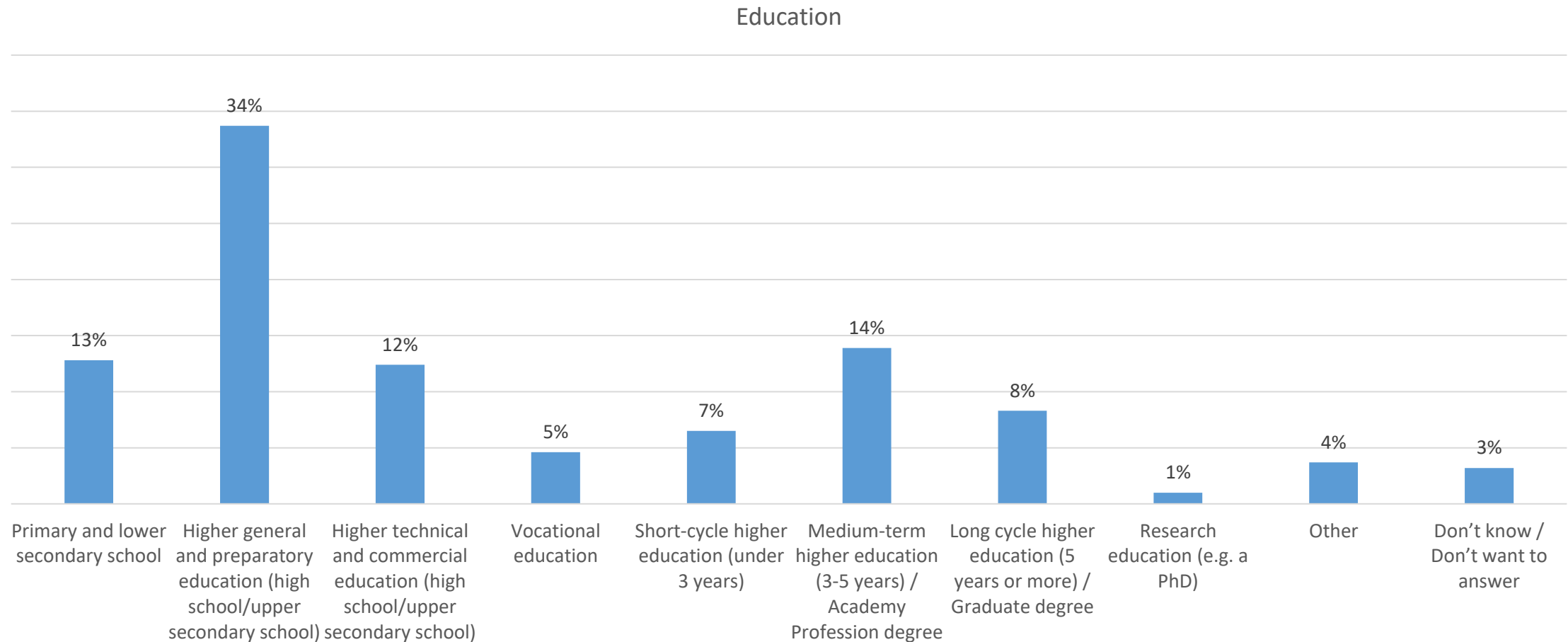
DEMOGRAPHY

Education



DEMOGRAPHY

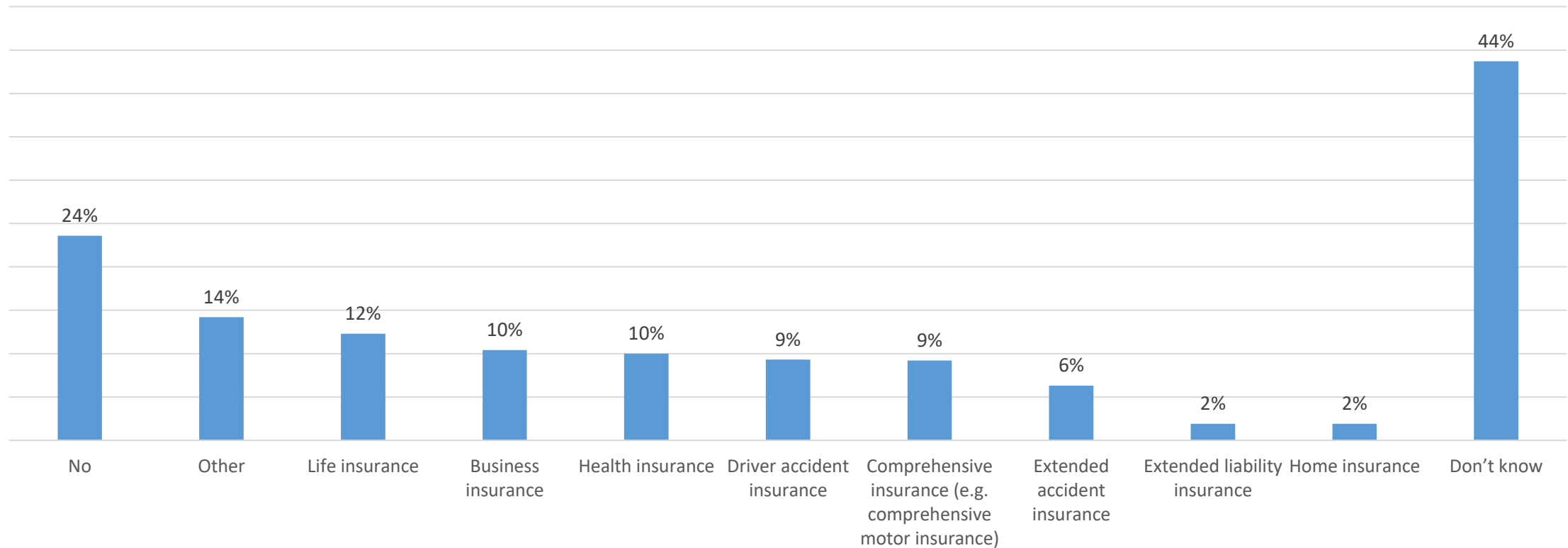
Education among courier partners with a Danish work permit nationality



DEMOGRAPHY

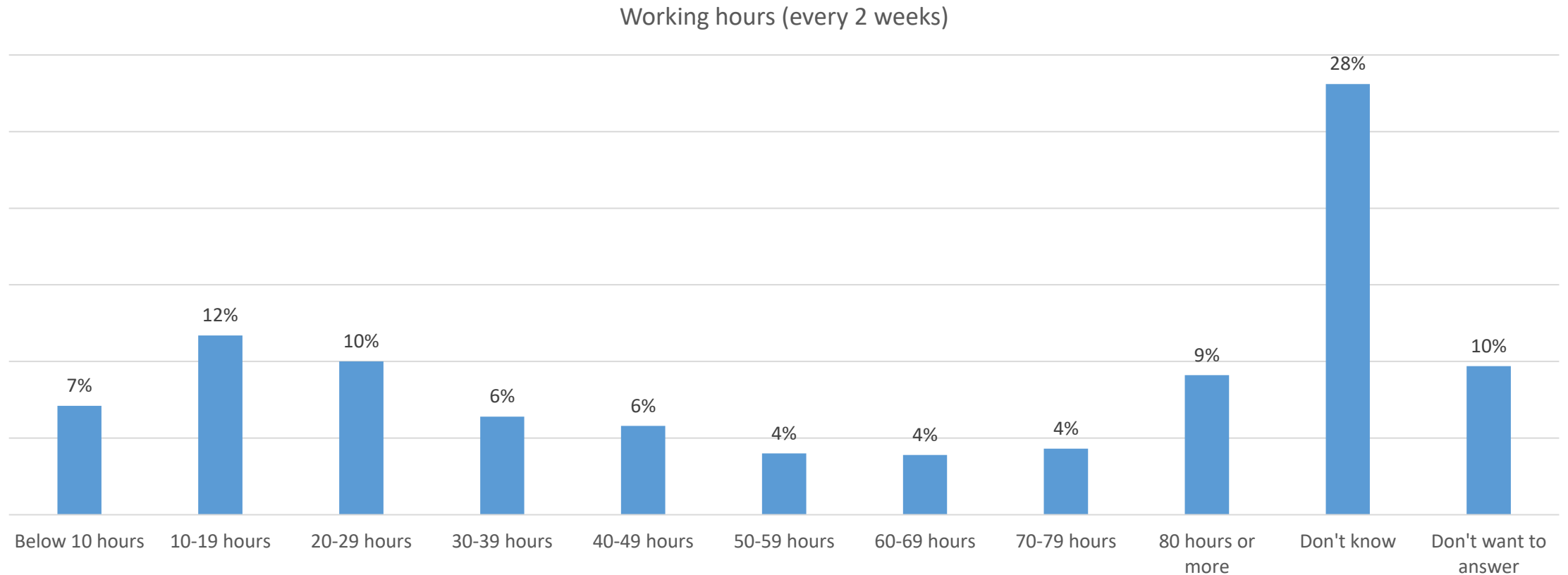
Insurance

As a courier partner at Wolt, you automatically have an accident and liability insurance. Have you taken out other insurances yourself?



DEMOGRAPHY

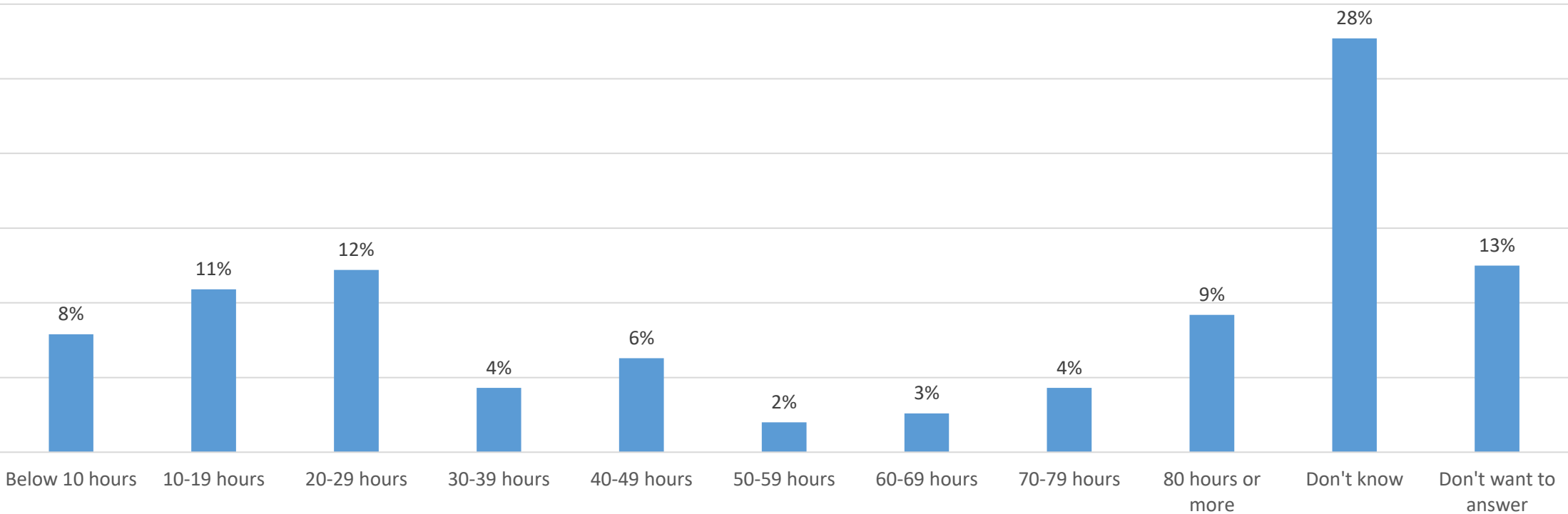
Working hours



DEMOGRAPHY

Working hours among courier partners with a Danish work permit nationality

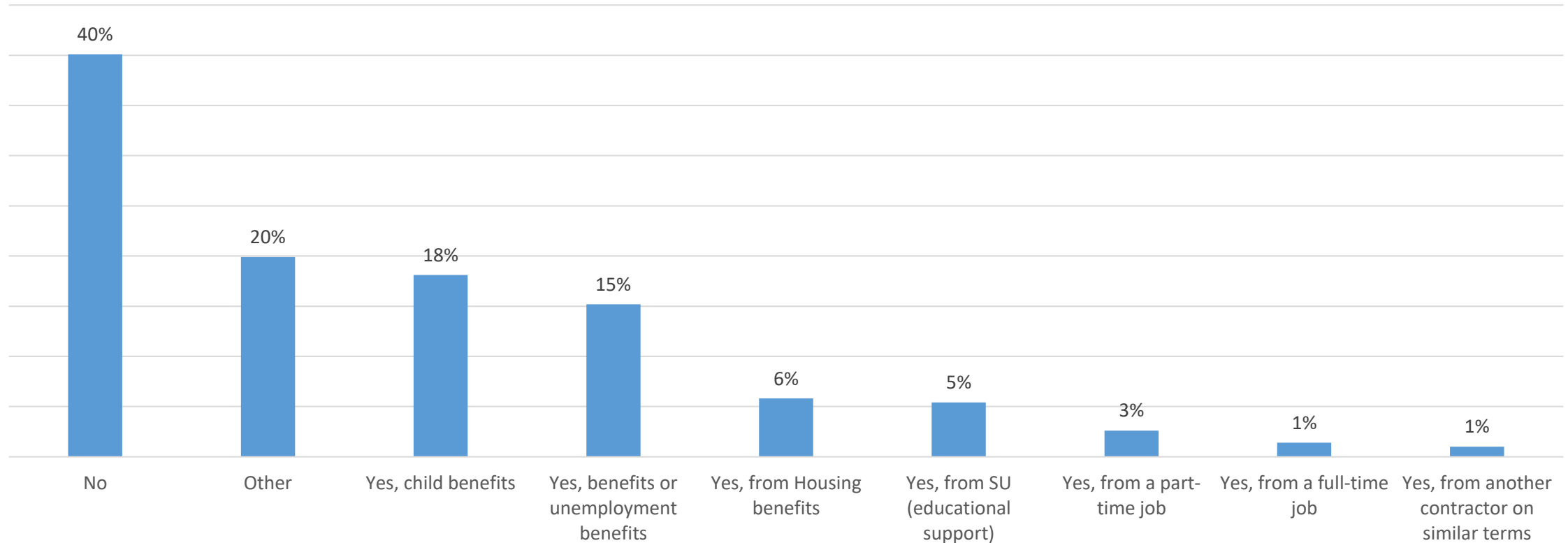
Working hours (every two weeks)



DEMOGRAPHY

Commitment to other secondary employments

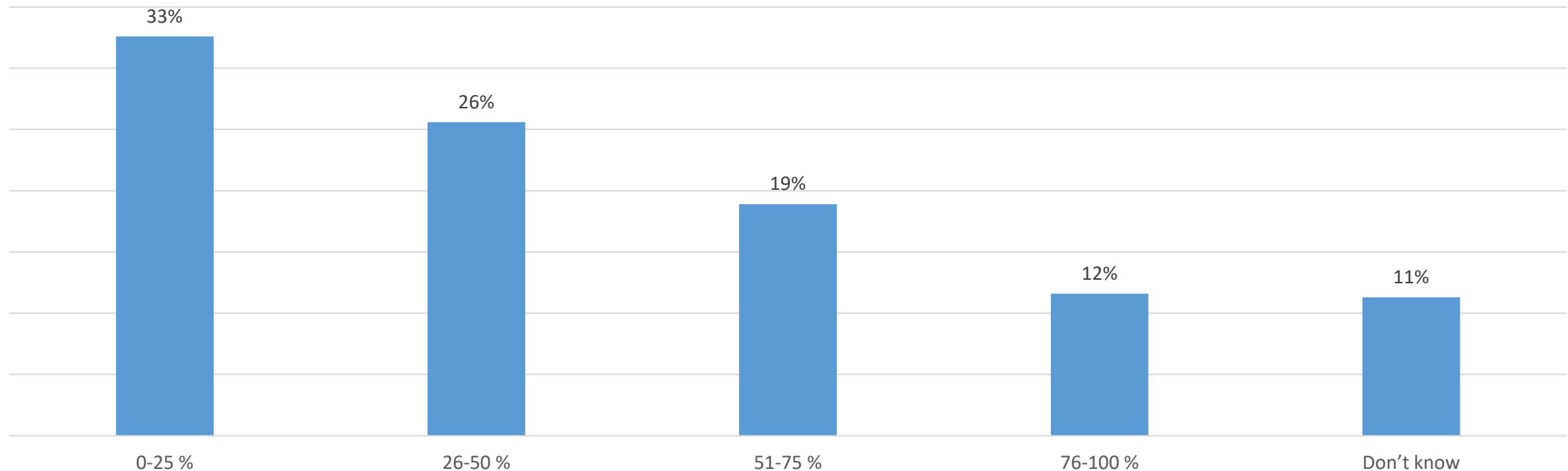
Do you receive any other type of income than what you receive from Wolt?



DEMOGRAPHY

Share of total income among those who receive other types of income than what they receive from Wolt

How big a share of your monthly income would you estimate to receive through your work at Wolt? If it changes monthly, please choose the average share.



MAIN FINDINGS



CONTENTMENT

Main findings

The analysis shows that:

- 89 % of the courier partners who participated in the survey indicate that they are overall satisfied with their affiliation with Wolt. In comparison to this, only 3 % of the courier partners indicate that they are dissatisfied
- 76 % of the courier partners indicate that they are satisfied with the income they generate from working with Wolt. In comparison to this, 9% declare that they are to some extent dissatisfied. A higher proportion of courier partners are thus satisfied with their overall partnership with Wolt (89%) than with their generated income (76%)
- Flexibility and deciding when one wants to take time off stand out as the two most important factors affecting the courier partners' general contentment in a positive way
- Not getting employer-paid salary during sickness and being responsible for obtaining and insuring one's own vehicle stand out as the two most important factors affecting the courier partners' contentment in a negative way

FACTORS AFFECTING CONTENTMENT

Main findings

The analysis shows that:

- 88% of the courier partners who indicate that they are very satisfied with the income they generate through Wolt, also declare that they are very satisfied with the partnership overall and vice versa
- Courier partners using a scooter, or an electrically powered bike, indicate that they are more satisfied with their partnership with Wolt compared to courier partners who use other means of transportation
- Courier partners who prefer working as a self-dependent partner report that they are more satisfied with the partnership compared to others
- Courier partners delivering in Aalborg and Lyngby indicate that they are more satisfied with the partnership compared to courier partners delivering elsewhere
- The older age groups are more likely to answer that they are satisfied with the partnership compared to the younger age groups
- Courier partners with higher education levels indicate that they are less satisfied with the partnership compared to courier partners with lower education levels
- Courier partners generating higher income levels from Wolt report that they are more satisfied with the partnership compared to those generating lower income levels
- Courier partners who work more hours compared to others are more likely to indicate that they are very satisfied with the partnership
- Courier partners who generate most of their total income through Wolt seems to be more satisfied with the partnership compared to others

WORK VALUES

Main findings

The analysis shows that:

- More than half of the courier partners indicate that they are very likely to know the differences between being a partner and an employee, while only 4% declare that they are unlikely to know the differences
- The more knowledge that the courier partners have on the differences between being a partner and an employee, the higher is their overall self-reported contentment with the partnership
- 68% of the courier partners indicate that they prefer working as a self-dependent partner, while 20% say that they prefer working as an employee
- Among the 1020 courier partners who indicate that they prefer working as a self-dependent partner, 88% say that they prefer this because it gives them the possibility to decide when they want to work
- More than half (61%) of the courier partners indicate that they prefer working as a self-dependent partner because they get to decide how much they earn based upon how many tasks they take
- Among the 303 courier partners who indicate that they prefer working as an employee, the highest proportion explain their preference with either employer-paid pension (55%), salary during sickness (61%) or the fact that they would rather avoid reporting their taxes to SKAT themselves (60%)
- The highest proportion of courier partners agree that they have chosen to work with Wolt either because they can deliver when they want (84%), because they simply enjoy delivering at Wolt's platform (70%) or because they can earn as much as they want (70%)

FACTORS AFFECTING WORK VALUES

Main findings

The analysis shows that:

- Those who indicate that they are very satisfied with being a courier partner at Wolt in general, are also more likely to say that they prefer working as a self-dependent partner (81%) compared to those who indicate that they prefer working as an employee (11%)
- The older age groups are slightly more likely to report that they prefer working as a self-dependent partner compared to the younger age groups
- Courier partners who have worked with Wolt for less than 6 months are less likely to indicate that they prefer working as a self-dependent partner (63%) compared to other seniority groups
- Courier partners with higher income levels are more likely to say that they prefer working as a self-dependent partner compared to others
- Courier partners who generate above 75% of their income through Wolt are more likely to answer that they prefer working as a self-dependent partner compared to courier partners who generate less than 75% of their income through Wolt
- Courier partners from especially Hungary (76%), Pakistan (78%) and Portugal (75%) report that they prefer working as a self-dependent partner compared to courier partners with other work permit nationalities

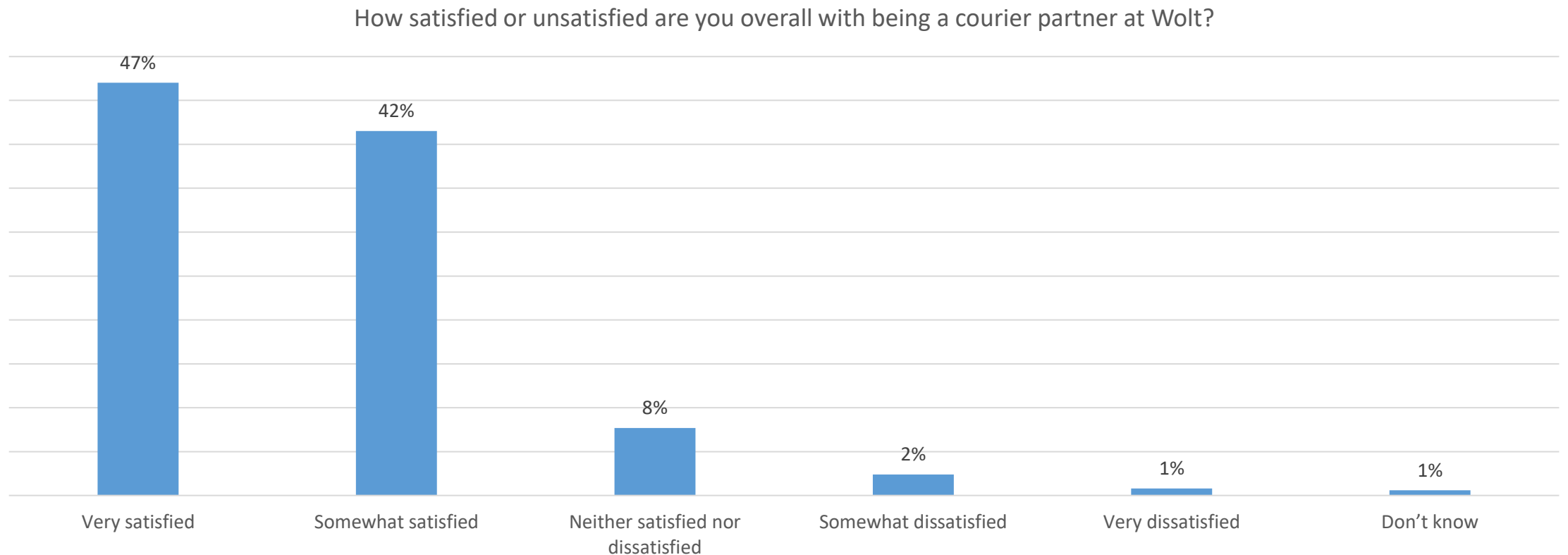


CONTENTMENT

CONTENTMENT

Overall contentment

89 % of the courier partners indicate that they are either very satisfied or somewhat satisfied with being a partner at Wolt. In comparison to this, only 3 % of the courier partners indicate that they are dissatisfied.

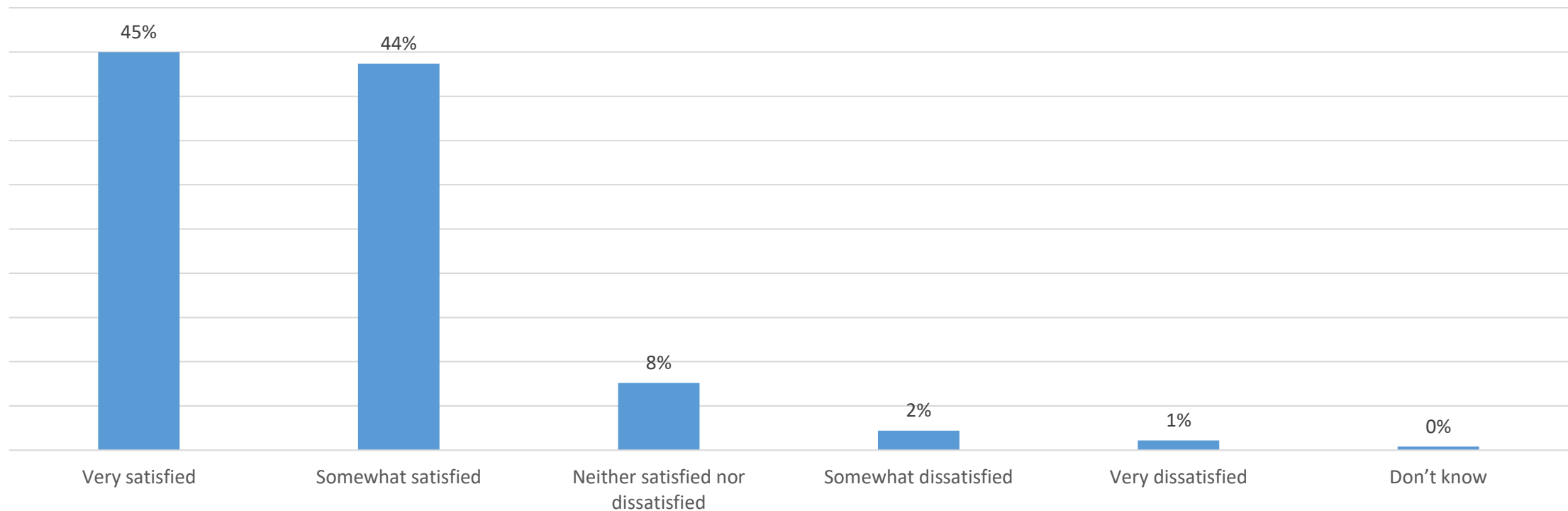


CONTENTMENT

Overall contentment among courier partners with a Danish work permit nationality

89% of the courier partners with a Danish work permit nationality indicate that they are either very satisfied or satisfied with being a partner at Wolt. Taking the findings on the previous page into consideration, the contentment does not seem to depend on work permit nationality.

How satisfied or unsatisfied are you overall with being a courier partner at Wolt?

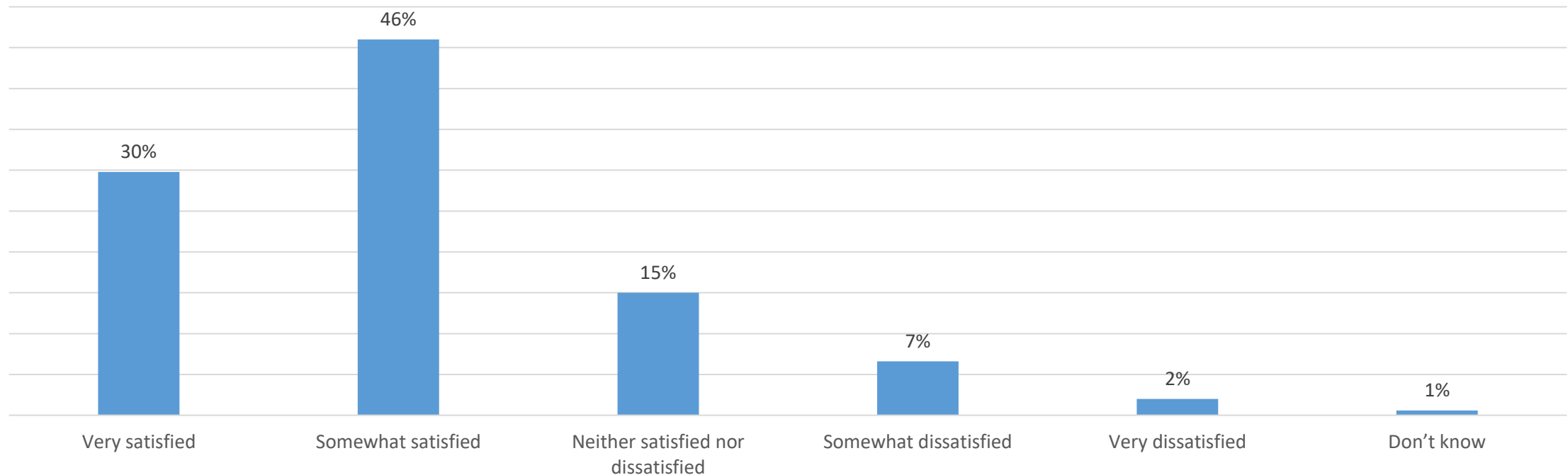


CONTENTMENT

Income contentment

Three out of four courier partners indicate that they are either very satisfied or somewhat satisfied with the income they generate as a Wolt partner. In comparison to this, 9% declare that they are to some extent dissatisfied. A higher proportion of courier partners are thus satisfied with their overall partnership with Wolt (89%) than with their generated income (76%).

How satisfied or unsatisfied are you overall with the income you generate from each task that you carry out as a courier partner with Wolt?

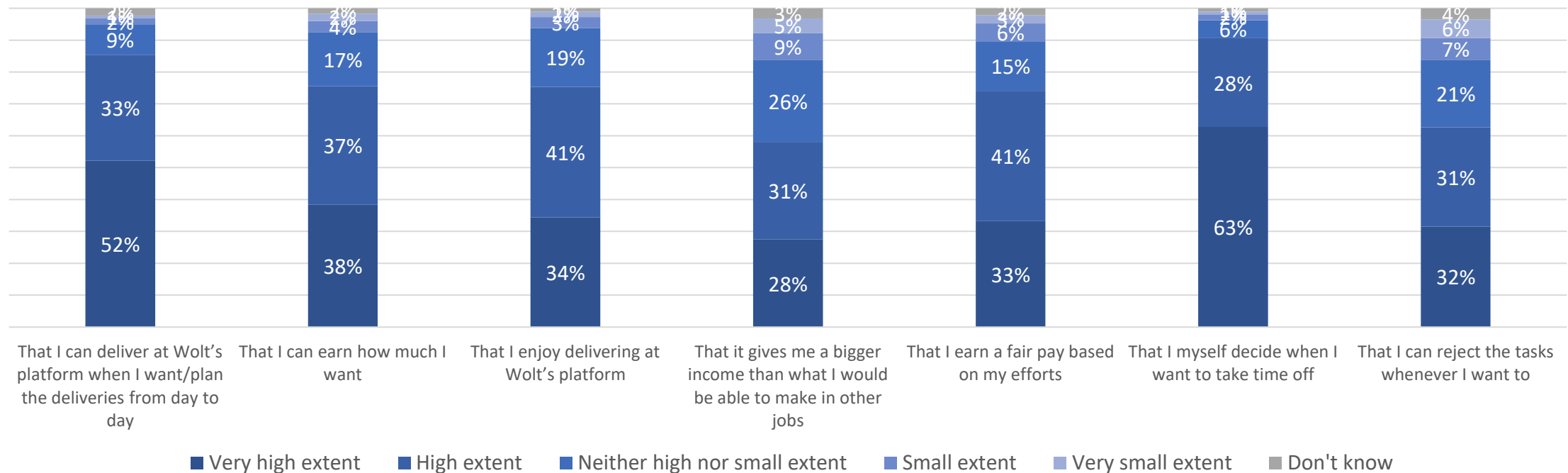


CONTENTMENT

Positive factors

Flexibility stands out as the most important factor affecting the courier partners' contentment with the partnership in a positive way, as 85% declare that the possibility of planning their own deliveries affect their overall contentment positively. Additionally, the possibility of deciding when one wants to take time off also stands out as an important source of contentment.

To what extent does the following affect your general satisfaction with being a courier partner at Wolt in a positive way?

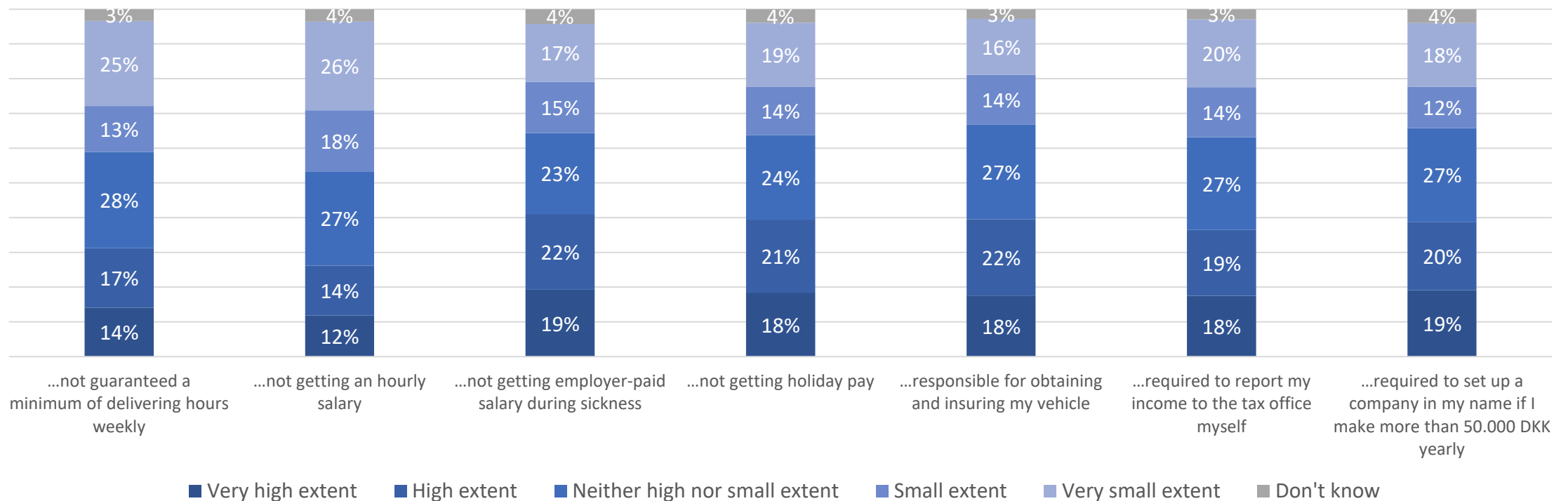


CONTENTMENT

Negative factors

Not getting employer-paid salary during sickness and being responsible for obtaining and insuring one's own vehicle stand out as the two most important factors that affect the courier partners' general contentment in a negative way.

To what extent does the following affect your general satisfaction with your work life in a negative way?

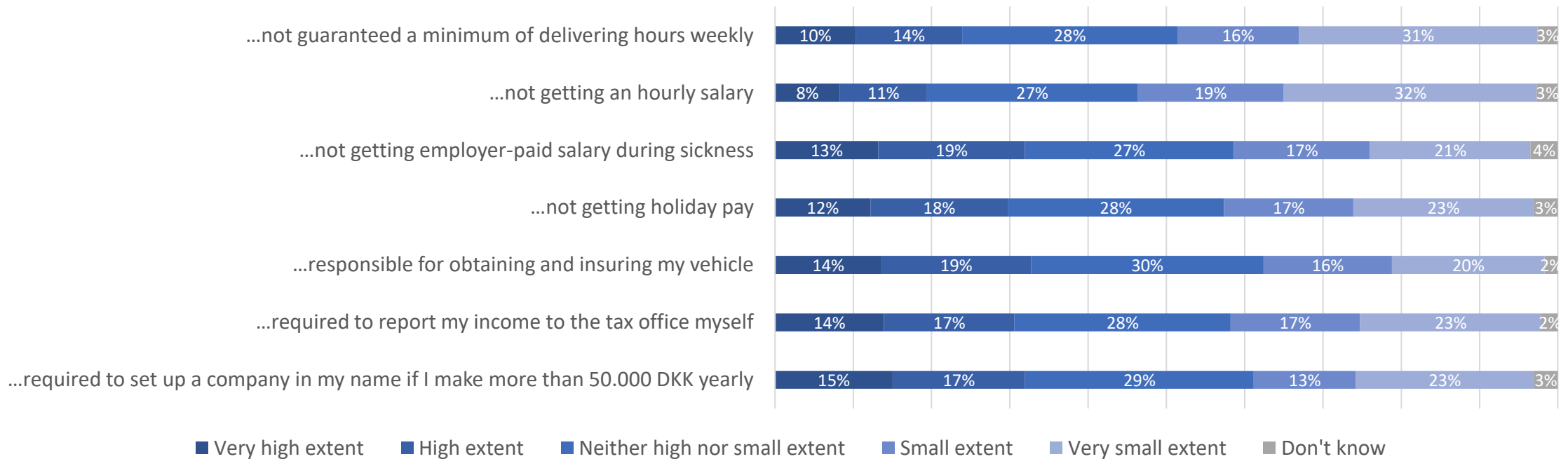


CONTENTMENT

Negative factors among courier partners with a Danish work permit nationality

Potentially being required to set up a company in their own name, being required to report their income to the tax office themselves and being responsible for obtaining and insuring one's own vehicle stand out as the three most important factors that affect the contentment of courier partners with a Danish work permit nationality negatively.

To what extent does the following affect your general satisfaction with your work life in a negative way?



FACTORS AFFECTING CONTENTMENT

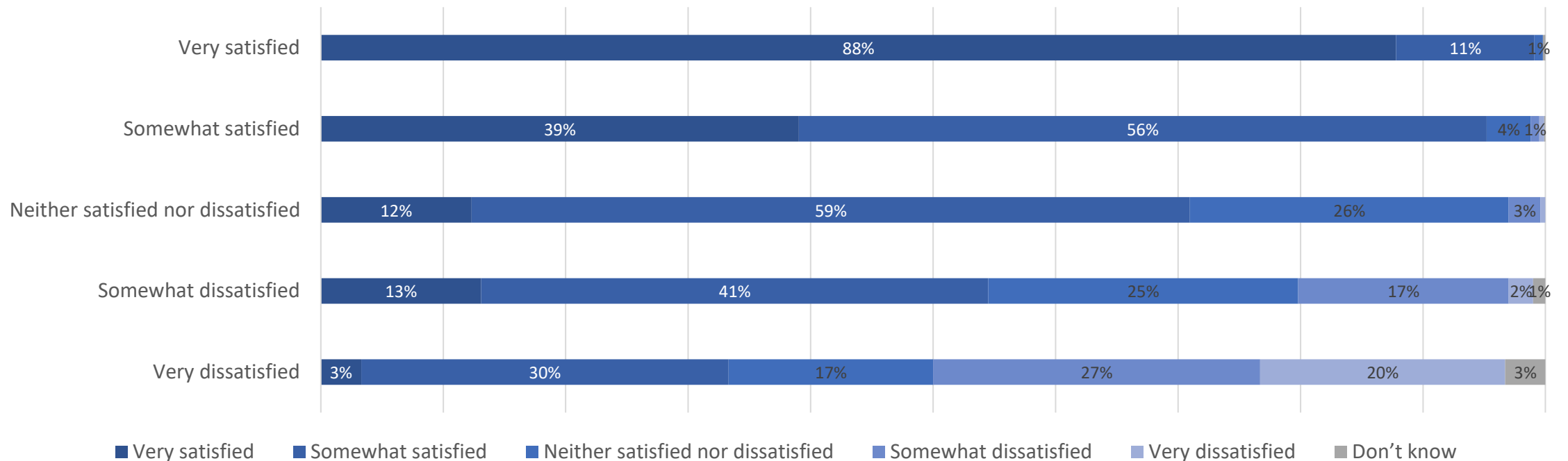


FACTORS AFFECTING CONTENTMENT

Income

The relation between income contentment (vertical axis) and overall contentment (horizontal axis) reveals that 88% of the courier partners who are very satisfied with their income are also very satisfied with the partnership overall. Conversely, the highest proportion of courier partners who are very dissatisfied with their income (20%), is found amongst those who also declare that they are very dissatisfied with the partnership overall.

How satisfied or unsatisfied are you overall with the income you generate from each task that you carry out as a courier partner with Wolt?

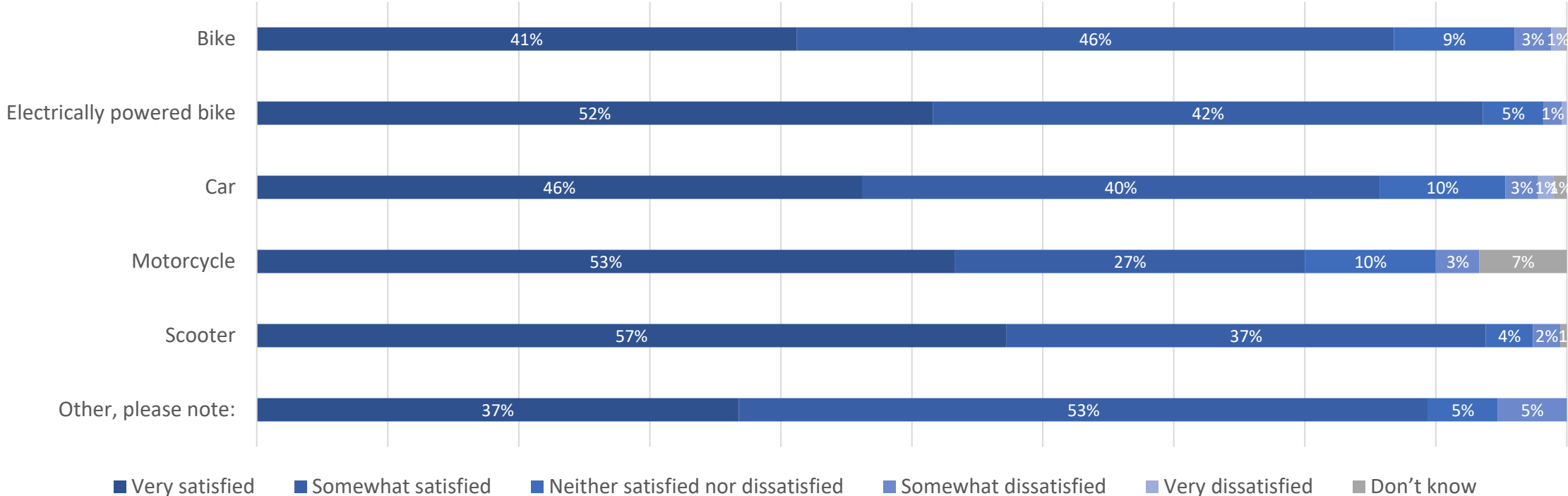


FACTORS AFFECTING CONTENTMENT

Vehicle

Courier partners using a scooter, or an electrically powered bike, report the highest overall contentment rates compared to others. 94% of the courier partners using an electrically powered bike or scooter are either every satisfied or somewhat satisfied.

What do you primarily use as a means of transportation when you are delivering on Wolt’s platform?

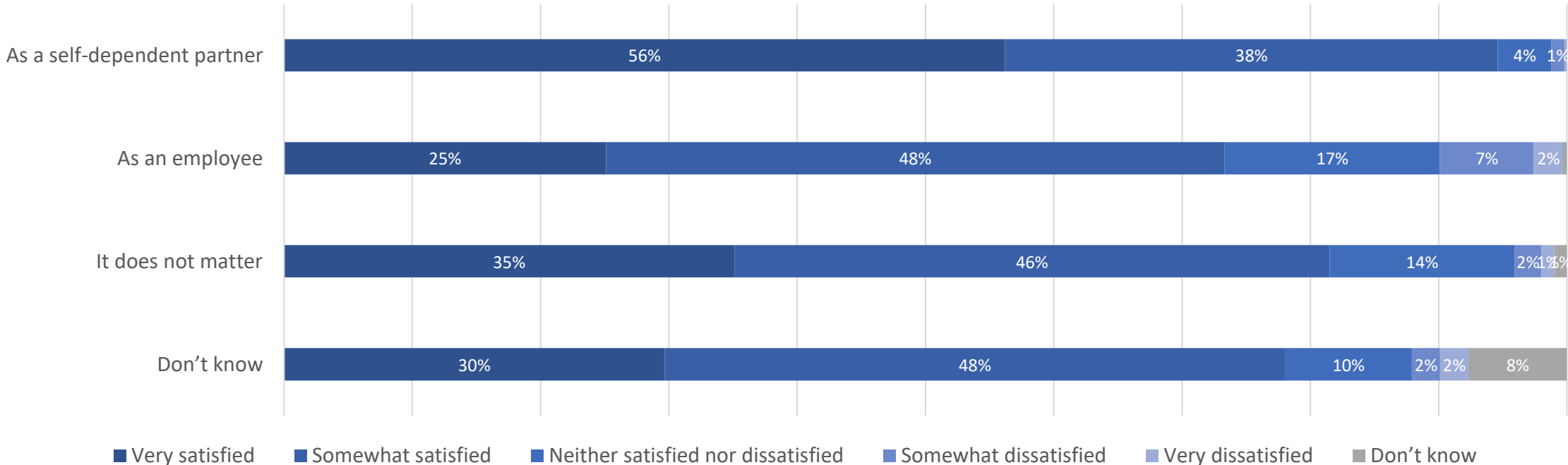


FACTORS AFFECTING CONTENTMENT

Work values

The graph below shows that courier partners who prefer working as a self-dependent partner indicate the highest overall contentment, as 94% declare to be either very satisfied or somewhat satisfied.

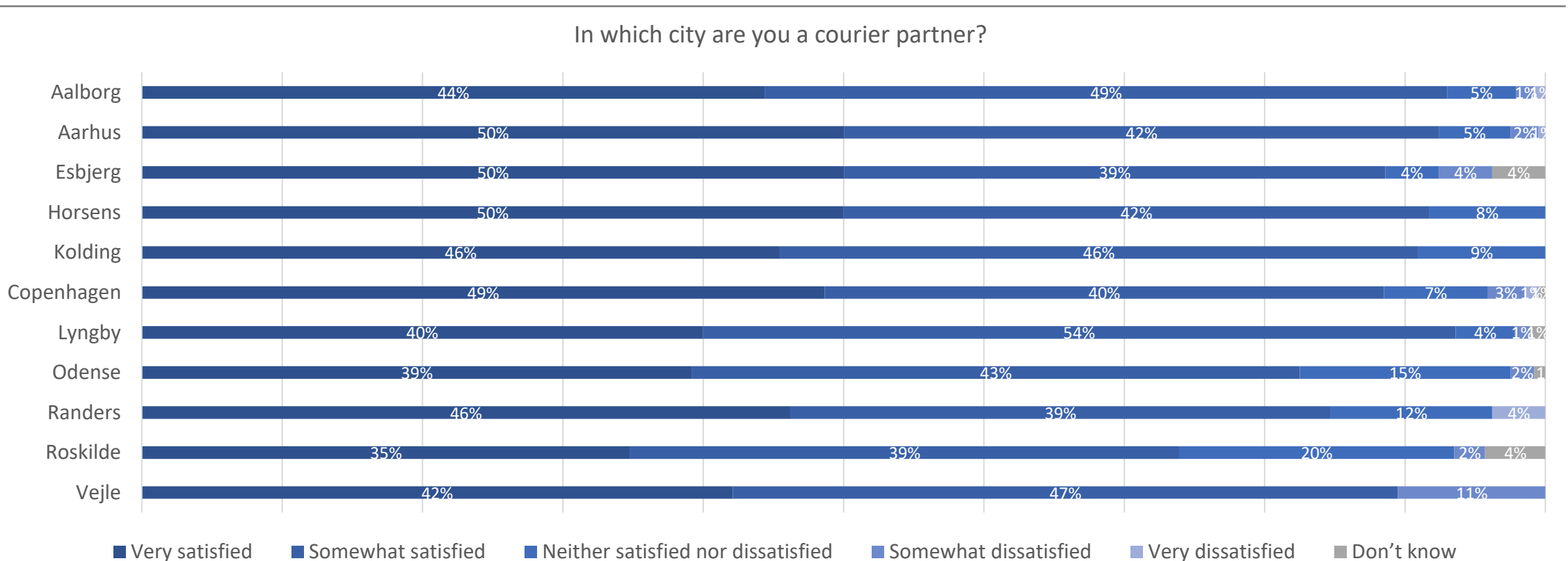
From the descriptions above, would you rather be a self-dependent partner or an employee in a firm, considering your current situation?



FACTORS AFFECTING CONTENTMENT

City

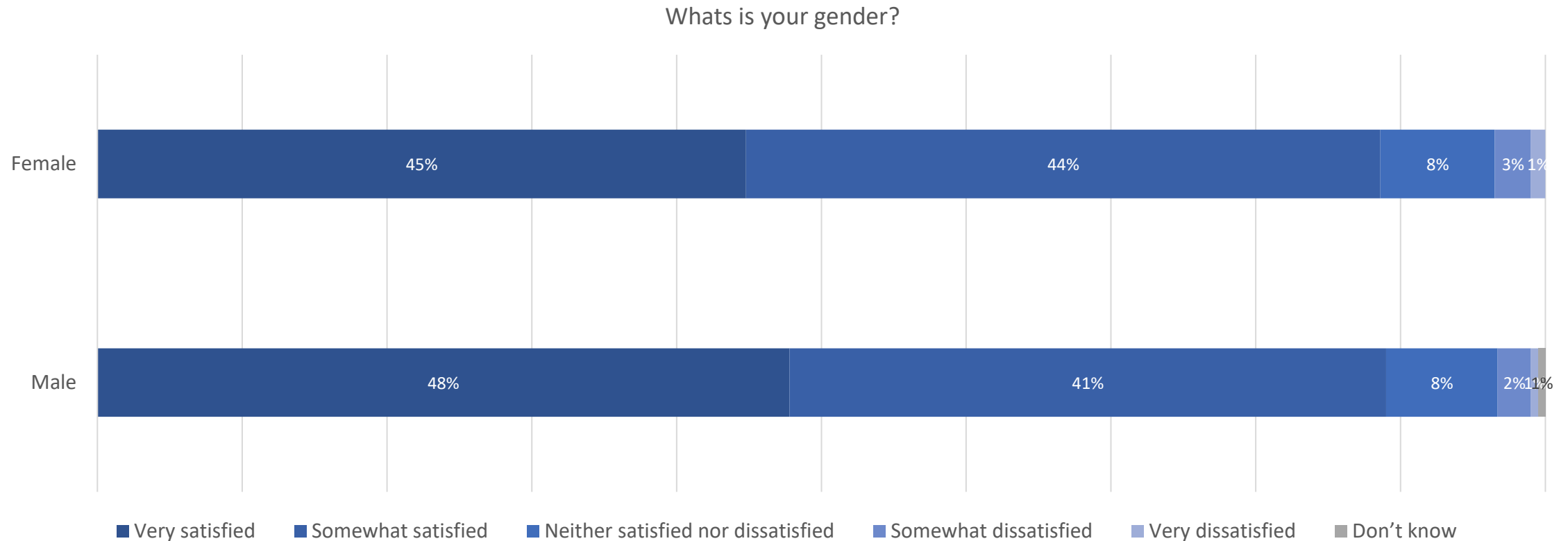
Aalborg (93 %) and Lyngby (94%) has the highest percentage of courier partners who report being overall satisfied with the partnership.



FACTORS AFFECTING CONTENTMENT

Gender

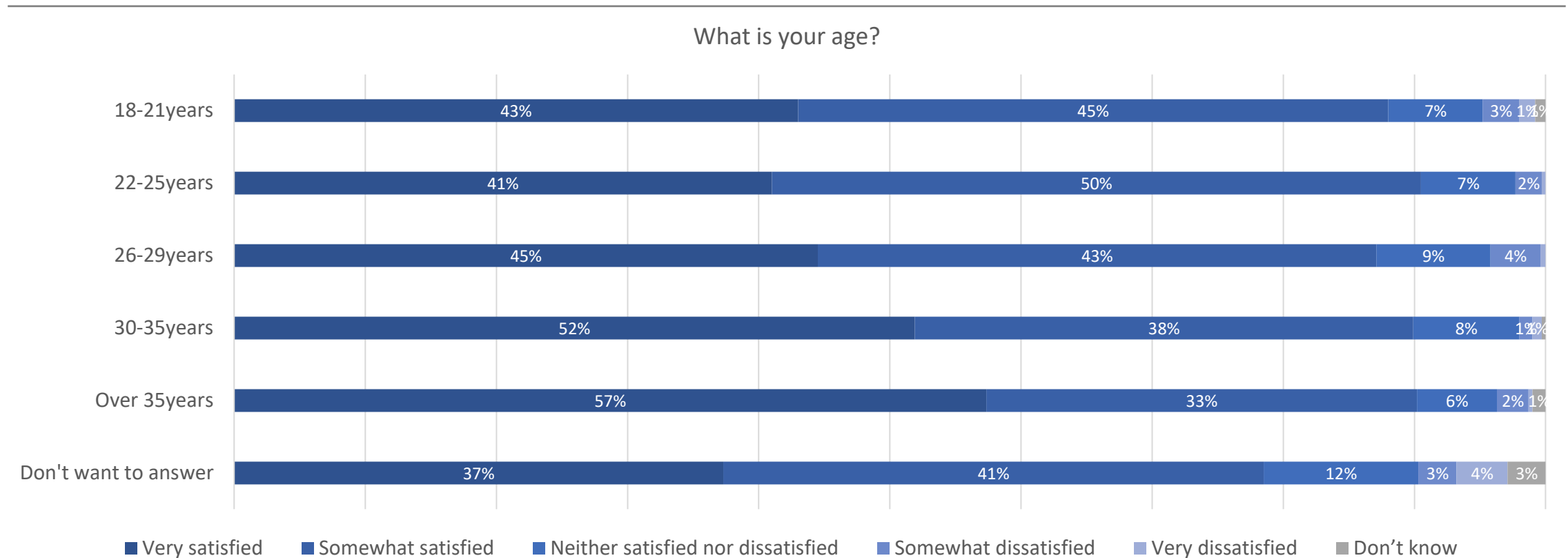
The graph below does not suggest any relation between gender and overall contentment with the partnership.



FACTORS AFFECTING CONTENTMENT

Age

The graph below shows that the older age groups are more likely to report being very satisfied with the partnership compared to the younger.

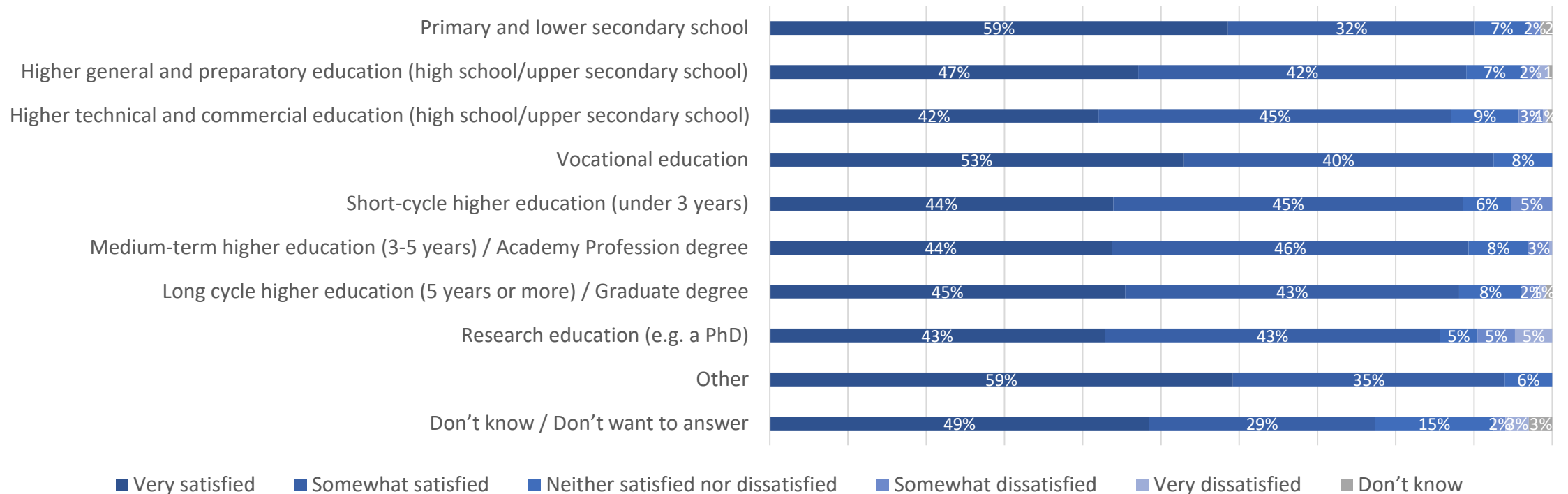


FACTORS AFFECTING CONTENTMENT

Education

The graph below suggests that education level is related to overall contentment: The higher education level that a courier partner has, the lower overall contentment does that person report.

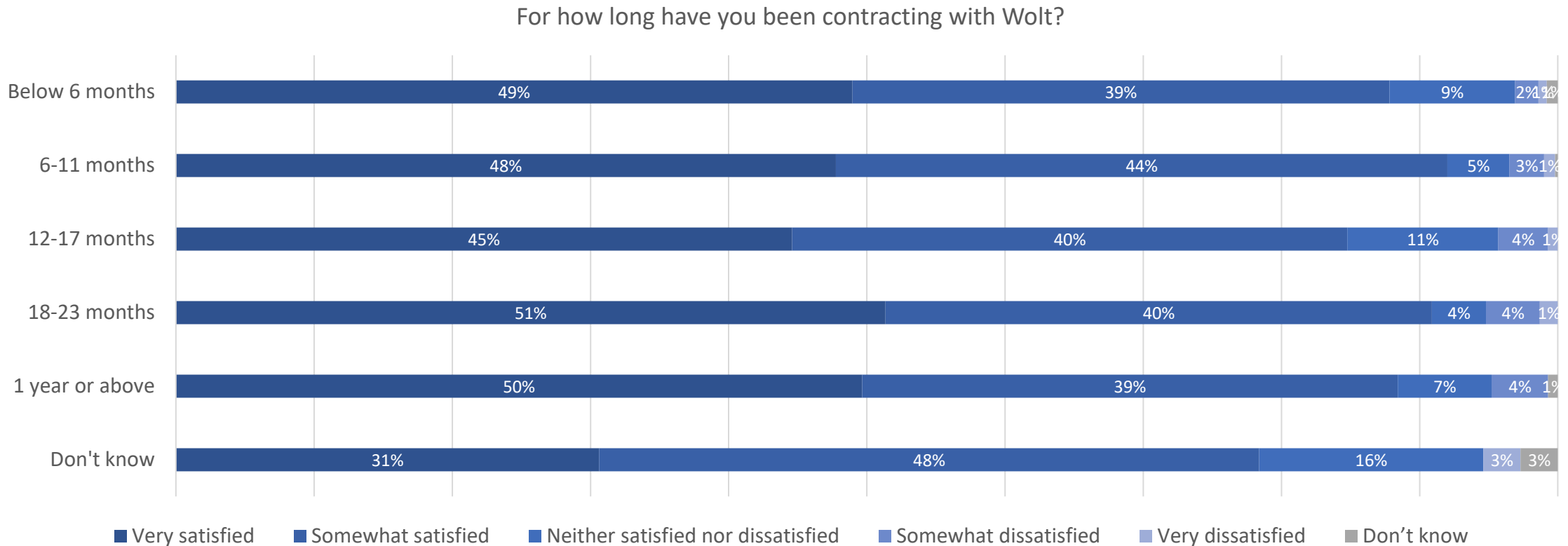
What is your highest level of education achieved?



FACTORS AFFECTING CONTENTMENT

Seniority

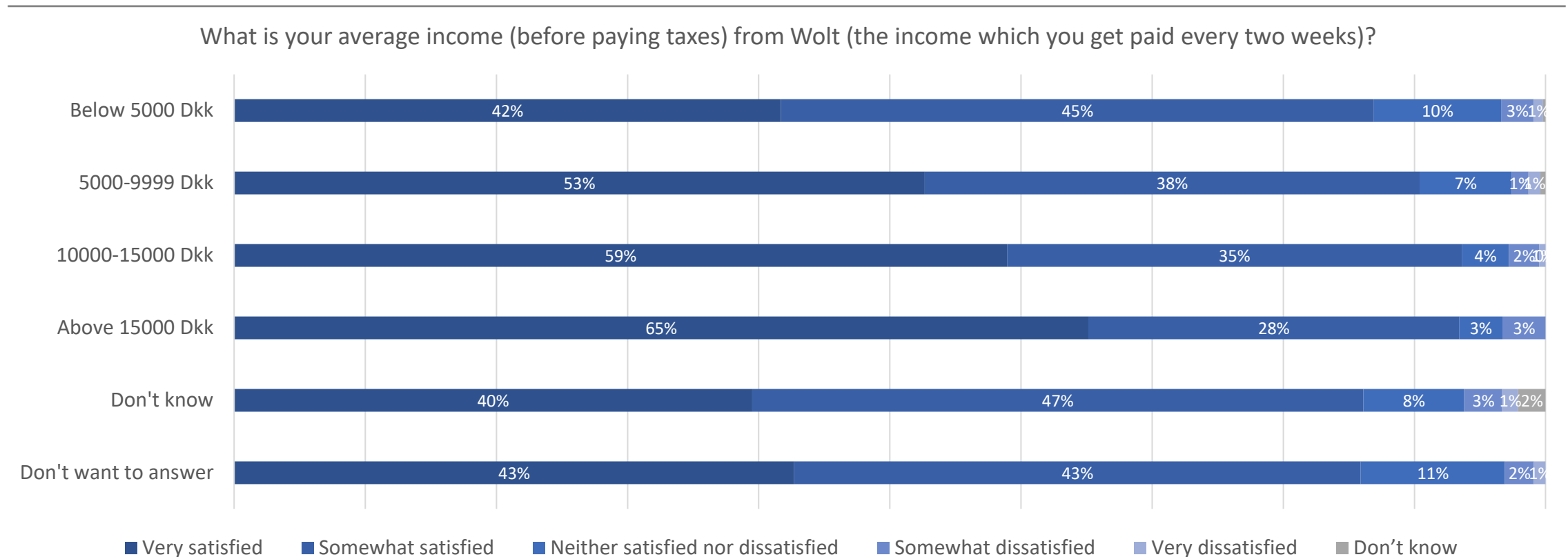
The graph below shows no noteworthy relation between seniority and overall contentment.



FACTORS AFFECTING CONTENTMENT

Income

The visualization below suggests that courier partners with higher income levels also report higher overall contentment levels. Among courier partners with an income level above 15.000 DKK, 93 % declared to be satisfied to some extent with their overall Wolt partnership, while 65% declared to be very satisfied.

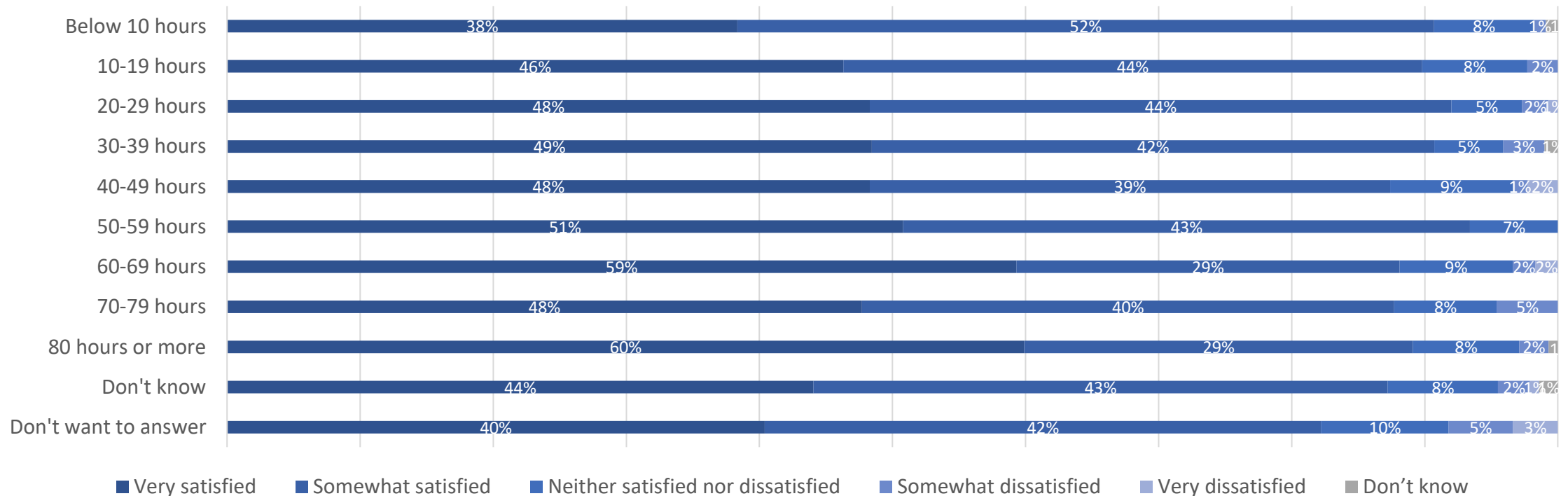


FACTORS AFFECTING CONTENTMENT

Working hours

The graph below suggests that courier partners who work the most compared to others, are more likely to report that they are very satisfied with the partnership. As an example, 60% of the courier partners working 80 hours or more answer that they are very satisfied, while only 38% of the courier partners working below 10 hours state that they are very satisfied.

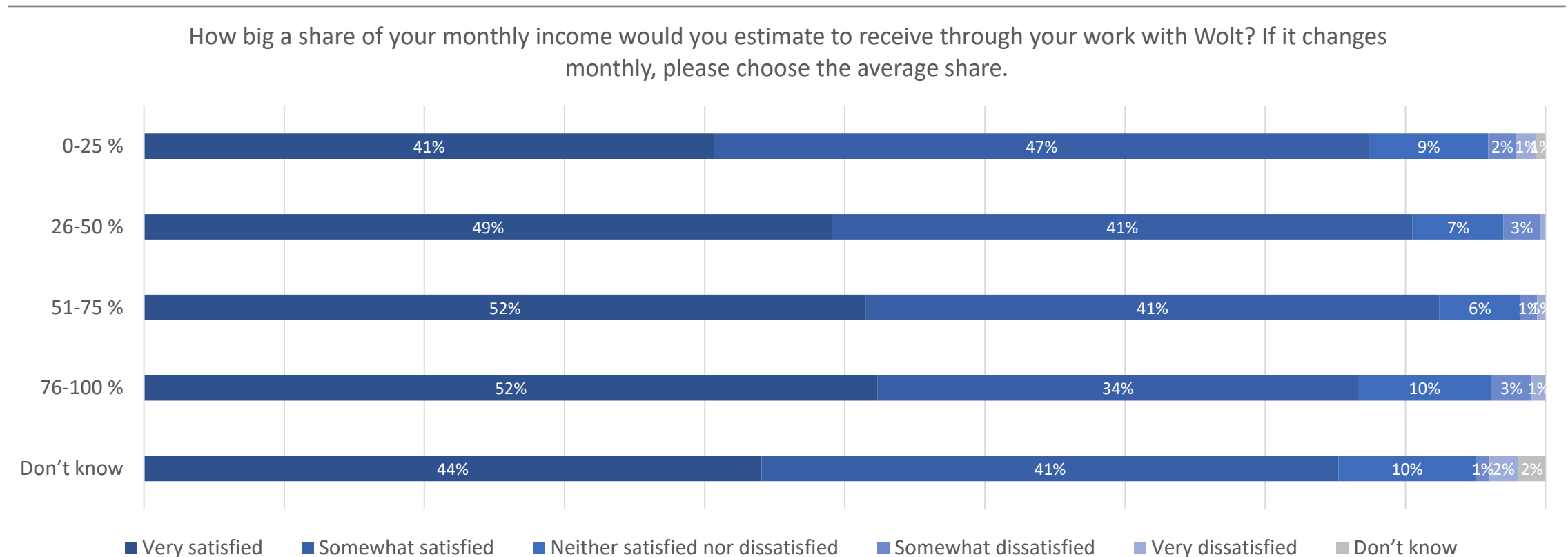
How many hours do you deliver on average in two weeks as a courier partner with Wolt?



FACTORS AFFECTING CONTENTMENT

Share of income

The graph below indicates that just over half (52%) of the courier partners who receive between 76-100% of their total income from Wolt are very satisfied with the overall partnership. In Comparison to this, 41% of the courier partners who receive between 0-25% of their total income from Wolt are very satisfied.

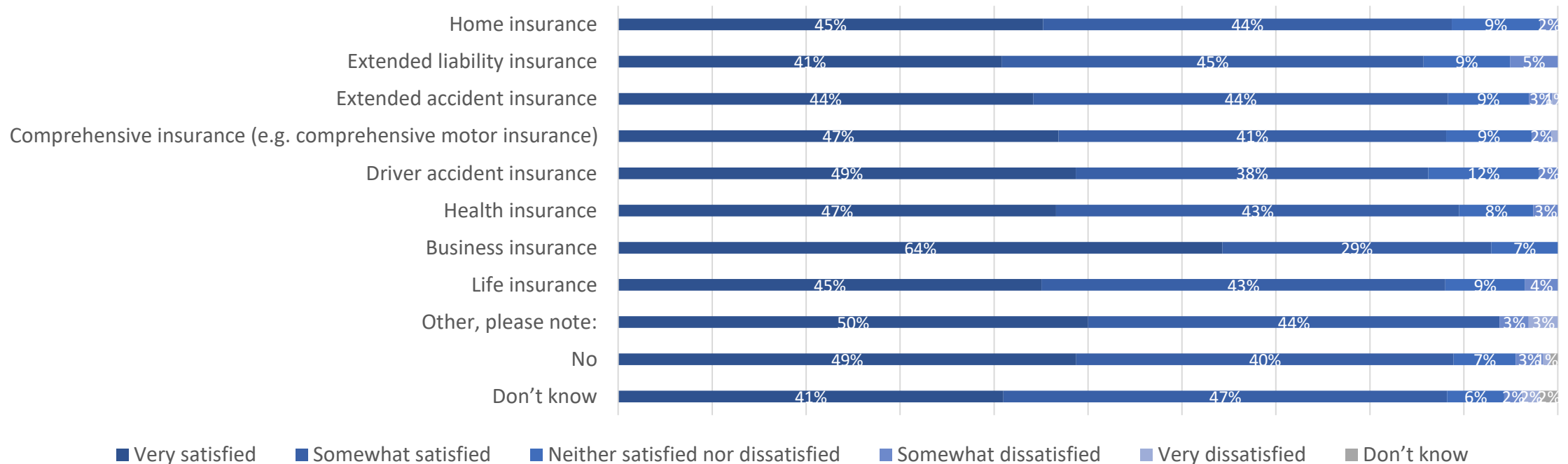


FACTORS AFFECTING CONTENTMENT

Insurance

The graph below shows that courier partners with a business insurance report the highest overall contentment with the partnership, as 93% declare to be either very satisfied or somewhat satisfied.

As a courier partner with Wolt, you automatically have an accident and liability insurance. Have you taken out other insurances yourself?



WORK VALUES
Knowledge and preferences



WORK VALUES

Knowledge

In order to investigate the courier partners' overall knowledge about their connection to the labor market, we asked them about their knowledge on the differences between being a partner and an employee:

As a courier partner with Wolt, you are a partner with and not an employee in Wolt. This means that you generate income under other terms than people who are employed.

How likely are you to agree with the following statement? I know the differences between being a partner and an employee.

Very likely

Somewhat likely

Neither likely nor unlikely

Somewhat unlikely

Very unlikely

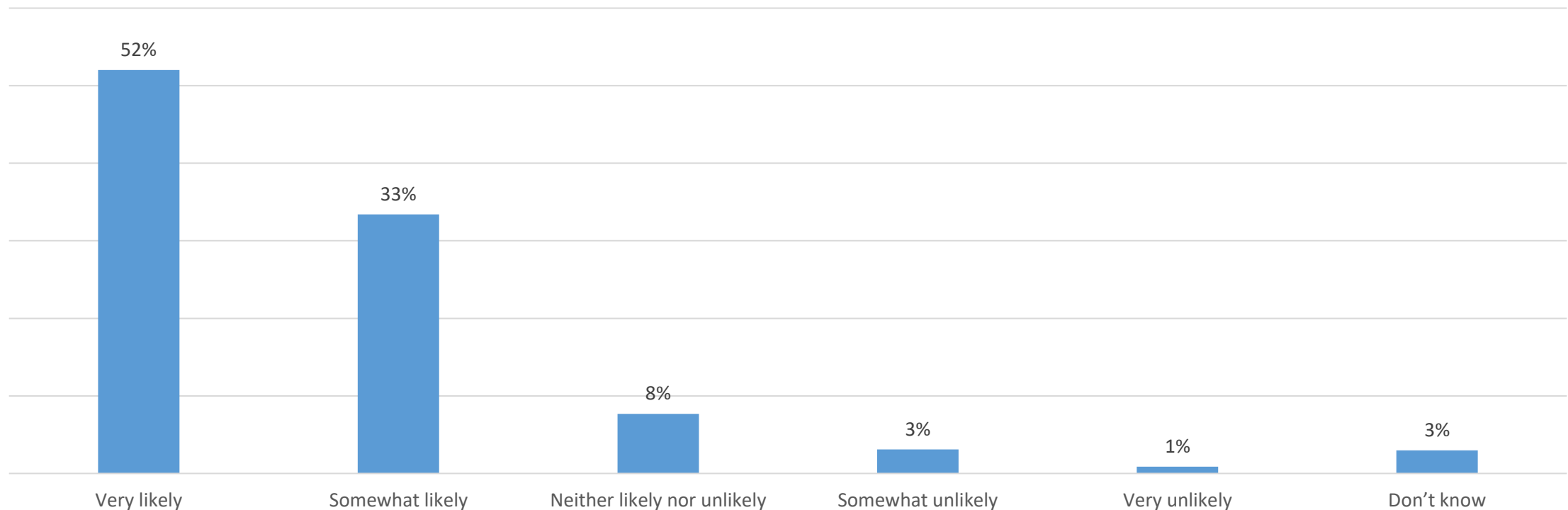
Don't know

WORK VALUES

Knowledge

The results show that more than half of the courier partners indicate that they are very likely to know the differences between being a partner and an employee, while only 4% declare that they are unlikely to know the differences.

How likely are you to agree with the following statement?
I know the differences between being a partner and an employee.

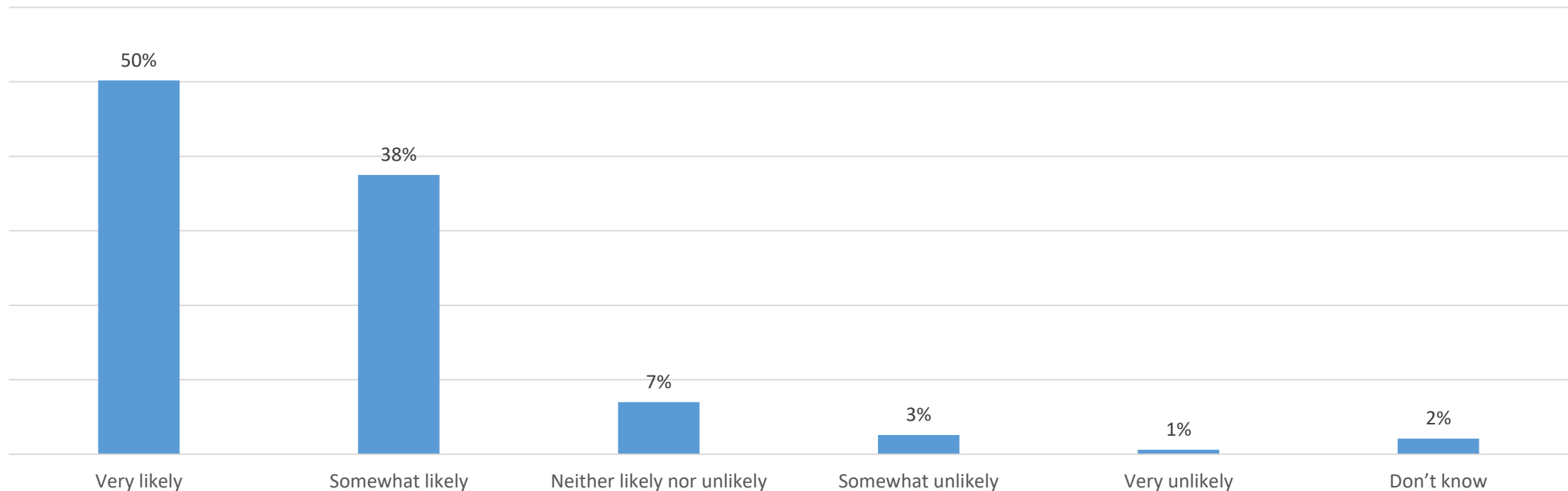


WORK VALUES

Knowledge among courier partners with a Danish work permit nationality

Among the courier partners with a Danish work permit nationality, half (50%) indicate that they are very likely to know the differences between being a partner and an employee, while only 4% state that they are somewhat or very unlikely to know the differences. Taking previous results into consideration, there seems to be no difference between courier partners with respectively Danish and non-Danish work permit nationalities when it comes to knowledge.

How likely are you to agree with the following statement?
I know the differences between being a partner and an employee.

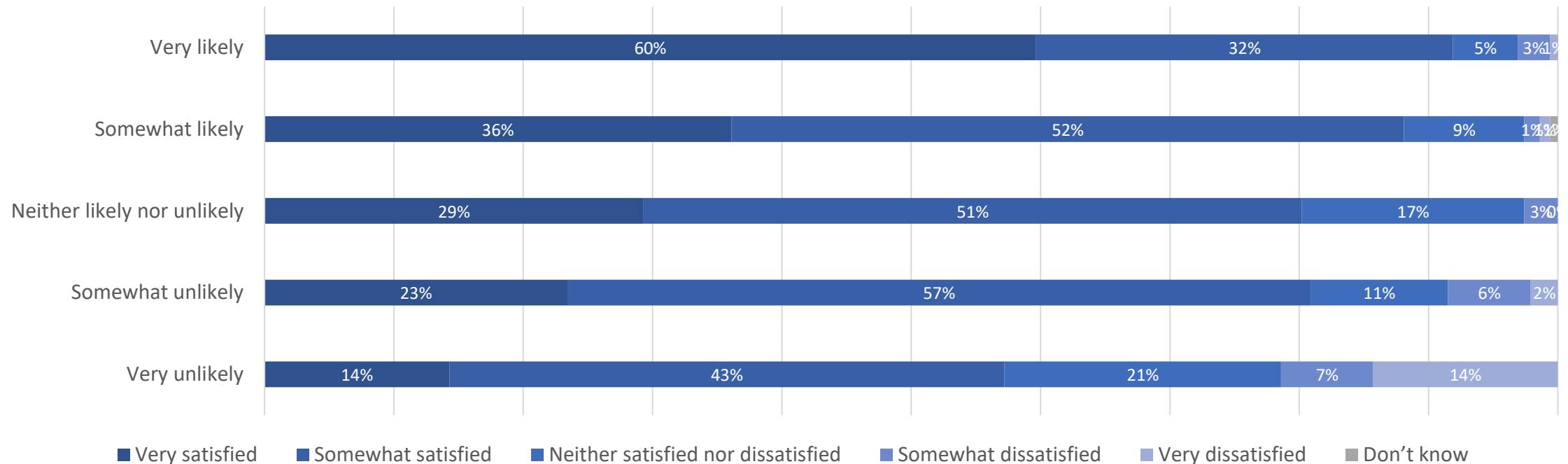


WORK VALUES

Knowledge

The results also point to the fact that the more knowledge the courier partners have on the differences between working as a partner and an employee, the higher is their overall self-reported contentment. For instance, 60 % of those who declared that they are “very likely” to know the differences, also declare that they are very satisfied with the partnership overall.

How likely are you to agree with the following statement?
I know the differences between being a partner and an employee.



WORK VALUES

Preferences

To get closer to an understanding of what the courier partners think about their position on the labor market, we asked them if they would rather work as a self-dependent partner or an employee:

There is a difference in whether you are a self-dependent partner or an employee in a company.

As a self-dependent partner, you typically collaborate under conditions which you to a certain extent shape yourself. This means that you for example decide on your own whether, how much and how you work, while you at the same time are not eligible for employee benefits such as employer-paid pension, insurance, and salary during sickness. As a self-dependent partner, you are also responsible for reporting your income to the tax office of SKAT, either as a private person or as an individual entrepreneurship.

As an employee, you typically work under conditions which you to a lesser extent shape yourself. For example, you do not decide on your own when, how much and how you work, while you also get a fixed salary. In return, you get employee benefits such as employer paid pension, insurance, and salary during sickness. As an employee, your income will be reported to the tax office of SKAT automatically.

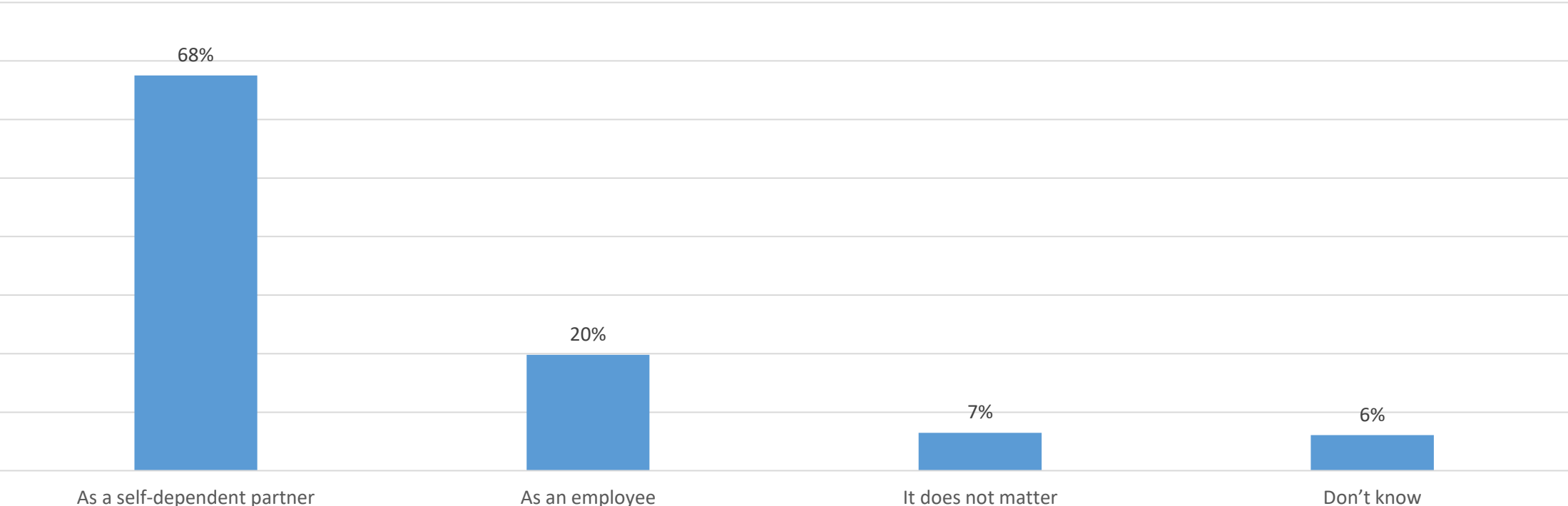
From the descriptions above, would you rather be a self-dependent partner or an employee in a firm, considering your current situation?

WORK VALUES

Preferences

68% of the courier partners report that they prefer working as a self-dependent partner, while 20% prefer working as an employee.

From the descriptions above, would you rather be a self-dependent partner or an employee in a firm, considering your current situation?

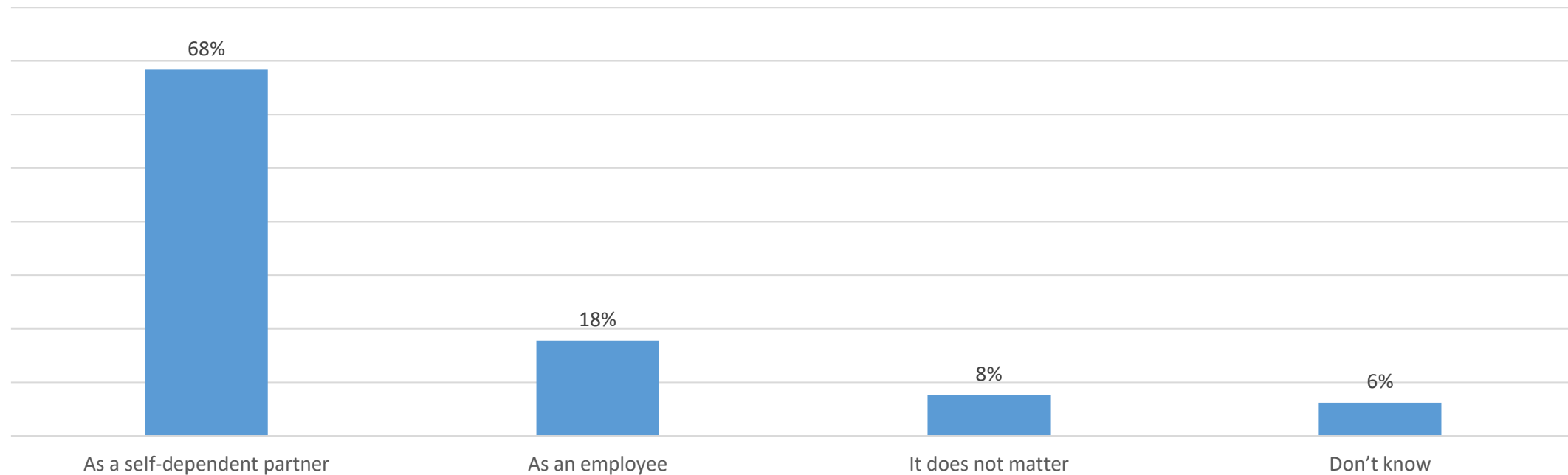


WORK VALUES

Preferences among courier partners with a Danish work permit nationality

Among the courier partners with a Danish work permit nationality, 68% report that they prefer working as a self-dependent partner, while 18% prefer working as an employee. Taking the results on the previous page into consideration, there seems to be no particular difference between courier partners with respectively Danish and non-Danish work permit nationalities when it comes to work values.

From the descriptions above, would you rather be a self-dependent partner or an employee in a firm, considering your current situation?

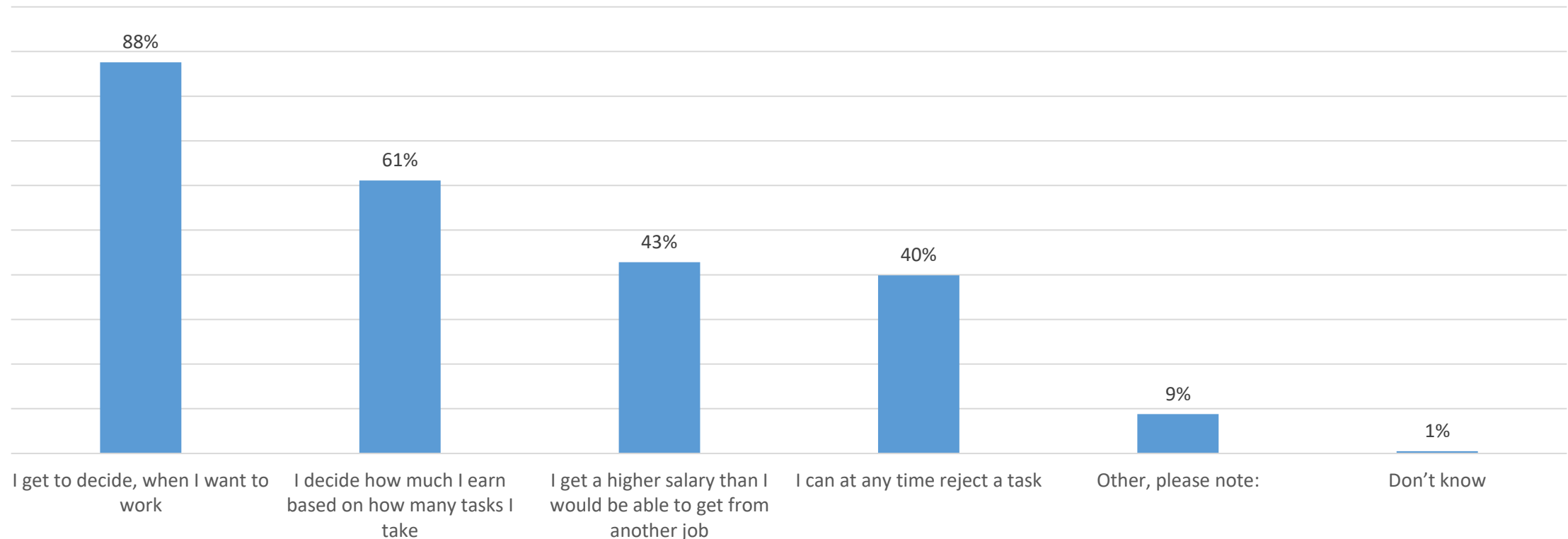


WORK VALUES

Preferences

Among the 1020 courier partners who indicate that they prefer working as a self-dependent partner, 88% say that they prefer this because it gives them the possibility to decide when they want to work. Also, more than half (61%) report that they prefer working as a self-dependent partner because they get to decide how much they earn based upon how many tasks they take.

You answered that you would rather be a self-dependent partner. Why is that?

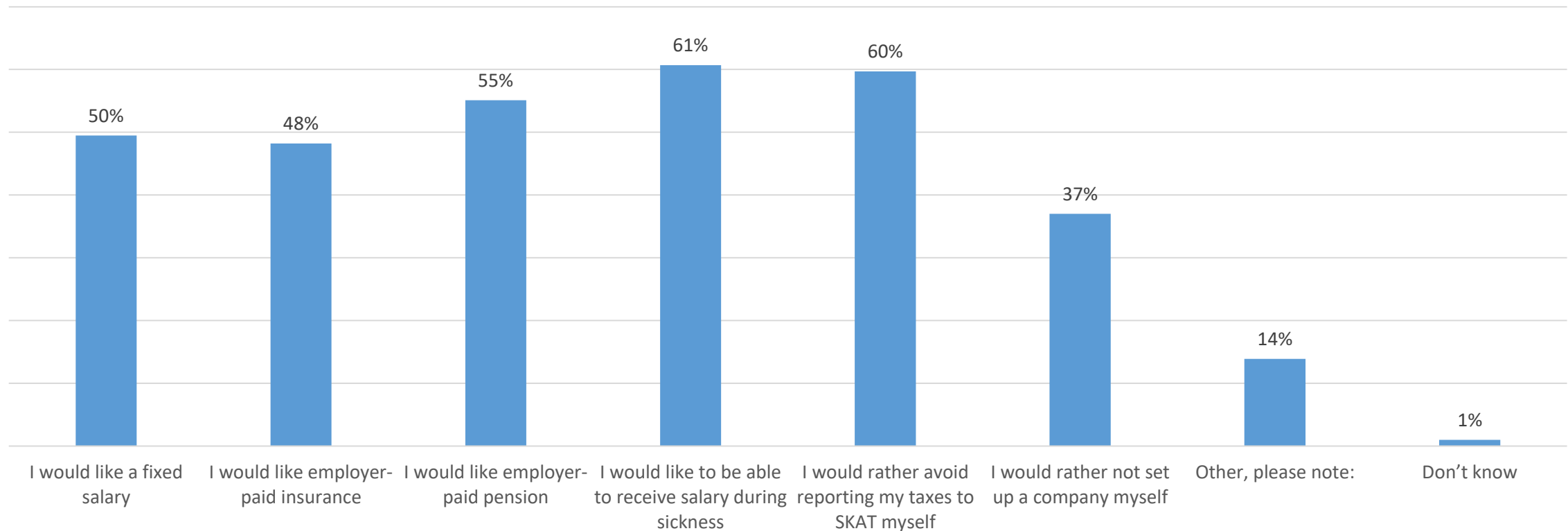


WORK VALUES

Preferences

Among the 303 courier partners who indicate that they prefer working as an employee, the highest proportion explain their preference with either employer-paid pension (55%), salary during sickness (61%) or the fact that they would rather avoid reporting their taxes to SKAT themselves (60%).

You answered that you would rather work as an employee. Why is that?

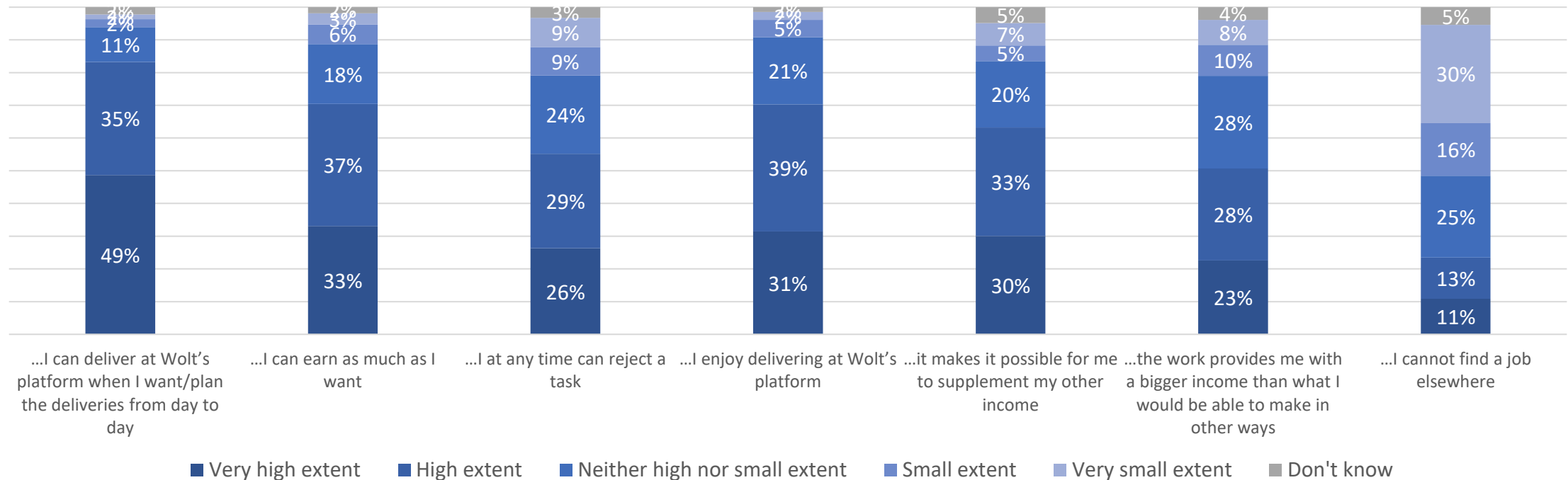


WORK VALUES

Preferences

The visualization below shows the extents to which the courier partners agree with different statements regarding why they have chosen to work with Wolt. The highest proportion agree that they have chosen to work with Wolt either because they can deliver when they want (84%), because they simply enjoy delivering at Wolt’s platform (70%) or because they can earn as much as they want (70%).

To what extent do you agree with the following statement?
I have chosen to be a courier partner at Wolt because...



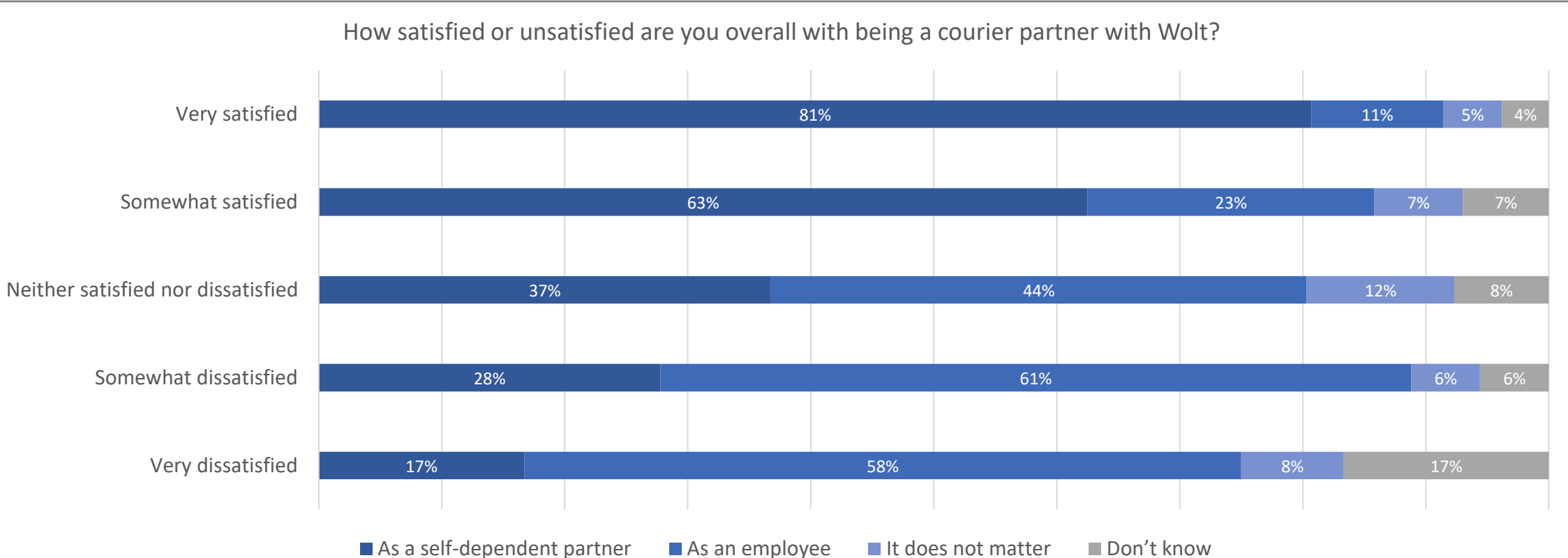
FACTORS AFFECTING WORK VALUES



FACTORS AFFECTING WORK VALUES

Overall contentment

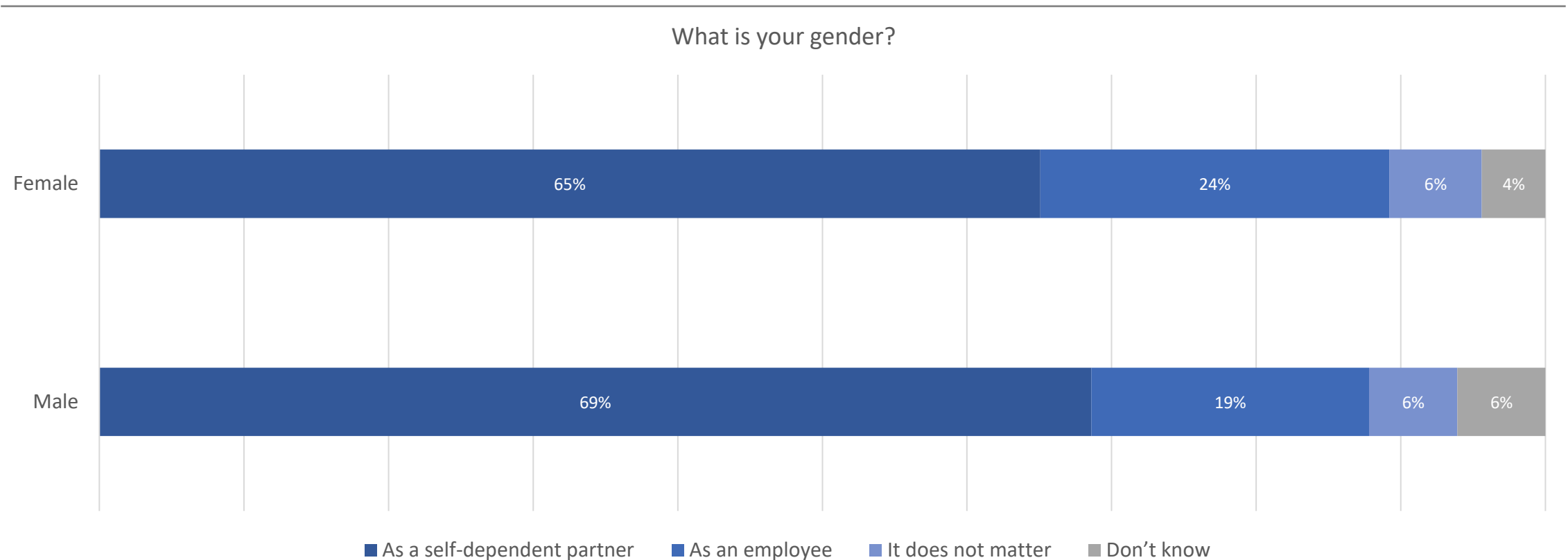
The graph below points toward a relation between overall contentment and preferred employment form: Those who indicate that they are very satisfied with being a courier partner at Wolt in general, are also more likely to prefer working as a self-dependent partner (81%), compared to those who prefer working as an employee (11%).



FACTORS AFFECTING WORK VALUES

Gender

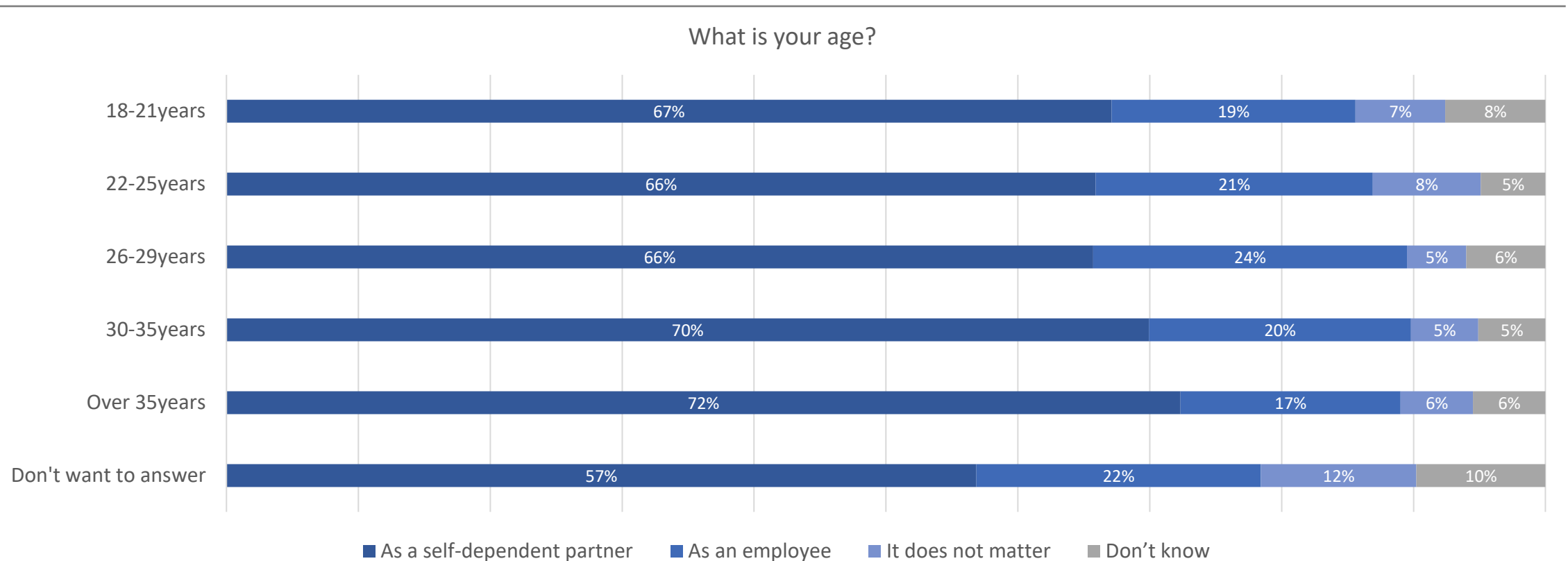
The graph below shows that there is no substantial difference between women and men when it comes to preferred employment form.



FACTORS AFFECTING WORK VALUES

Age

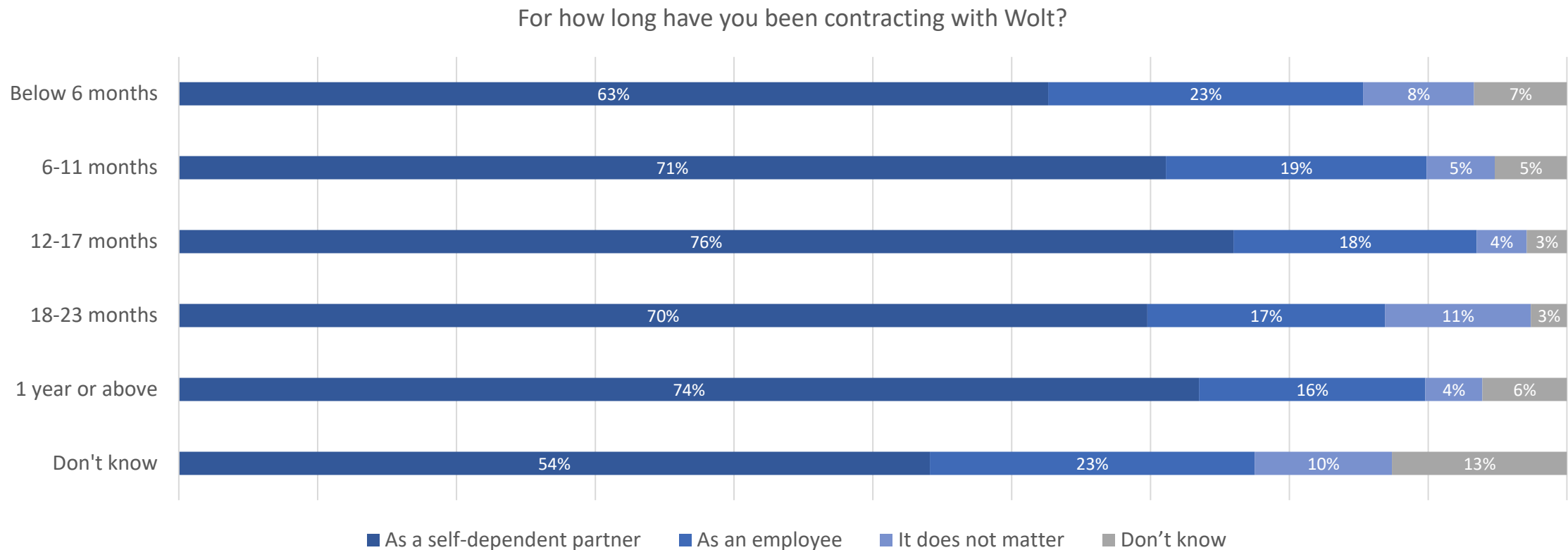
The graph below shows that the older age groups are slightly more likely to indicate that they prefer working as a self-dependent partner compared to the younger age groups. 72% of the courier partners who are 35 years old or above say that they prefer working as a self-dependent partner, while 67% of those between 18-21 years old declare that they prefer working as a self-dependent partner.



FACTORS AFFECTING WORK VALUES

Seniority

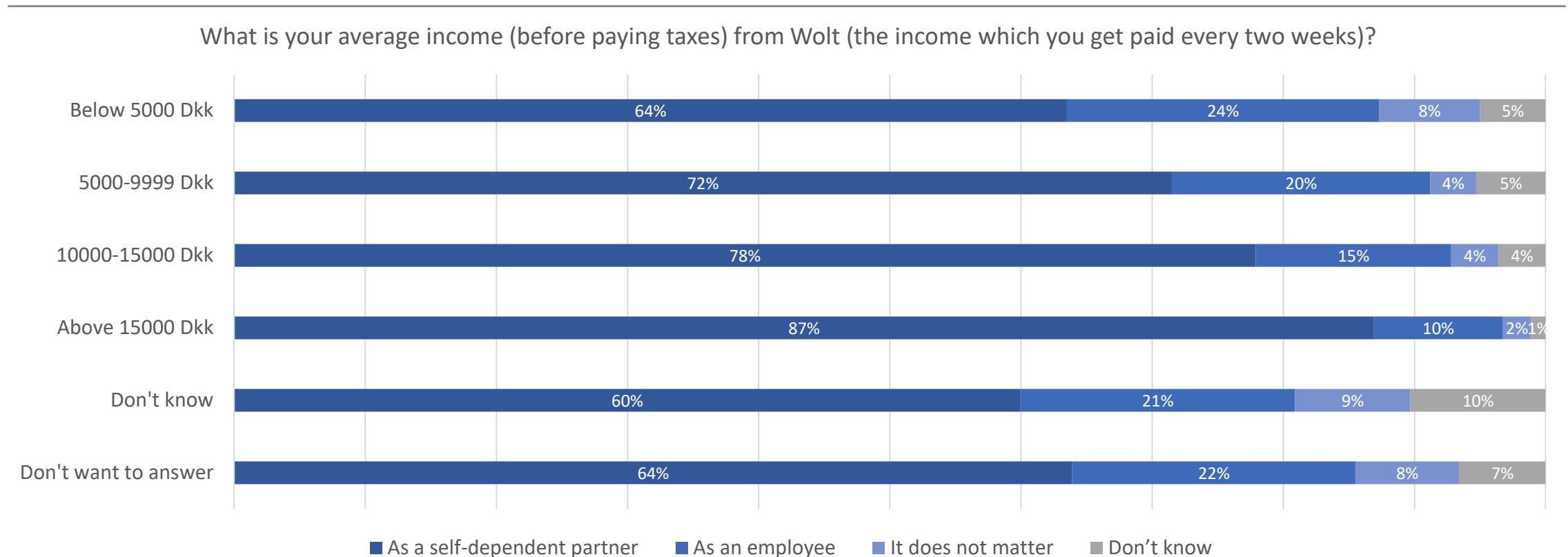
The graph below shows that courier partners who have worked less than 6 months with Wolt are less likely to indicate that they prefer working as a self-dependent partner (63%), compared to other seniority groups.



FACTORS AFFECTING WORK VALUES

Income

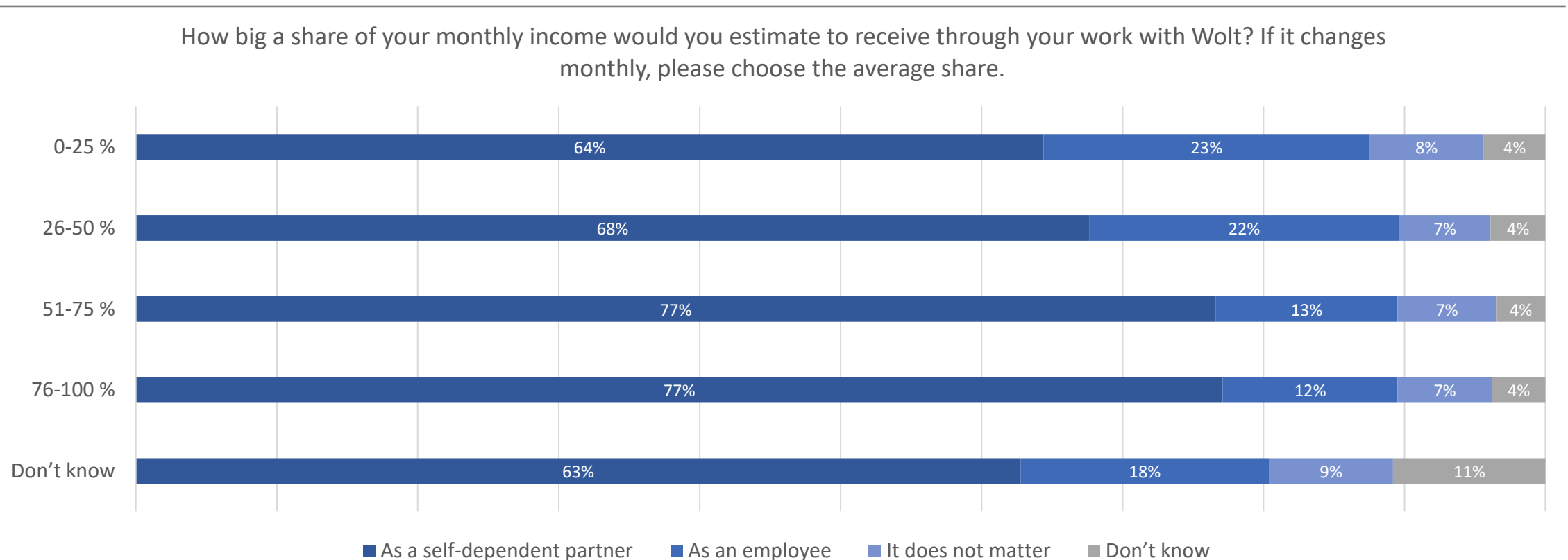
The graph below shows that courier partners with higher income levels are more likely to indicate that they prefer working as a self-dependent partner. 87% of the courier partners with an income level above 15.0000 DKK report that they prefer this option, while it is the case for only 64% of the courier partners earning below 5000 DKK.



FACTORS AFFECTING WORK VALUES

Share of total income

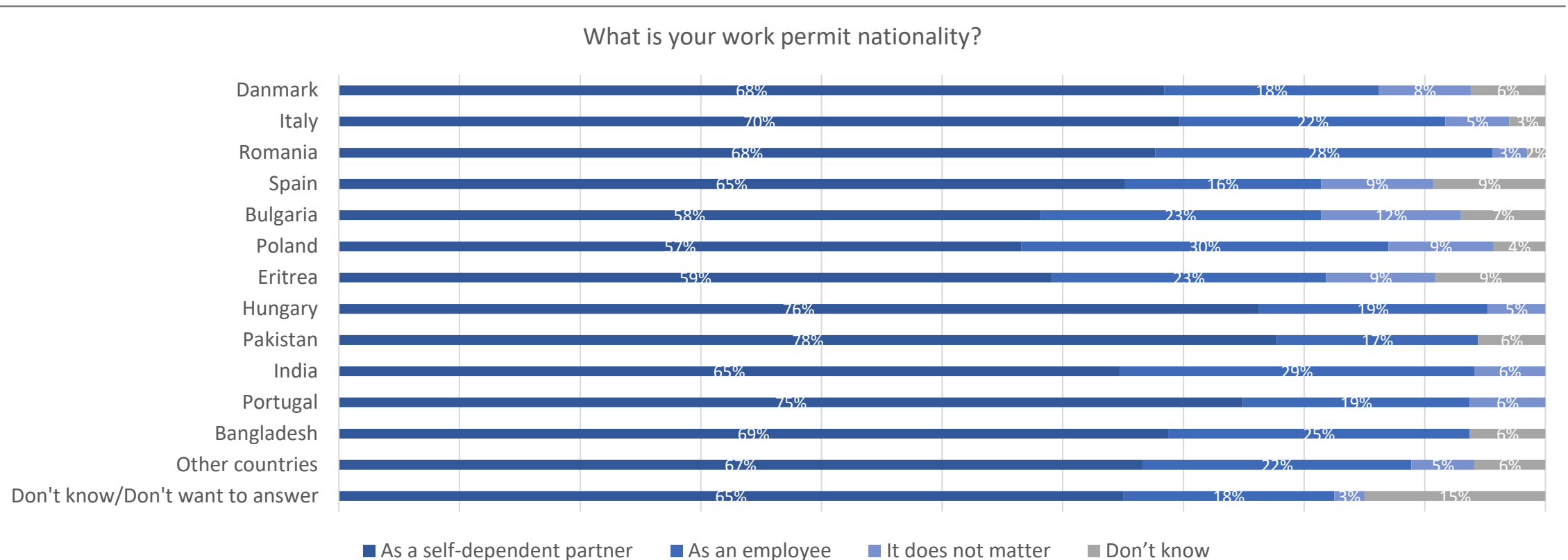
The visualization below points toward the fact that courier partners who receive above 75% of their income through Wolt, are more likely to indicate that they prefer working as a self-dependent partner compared to others.



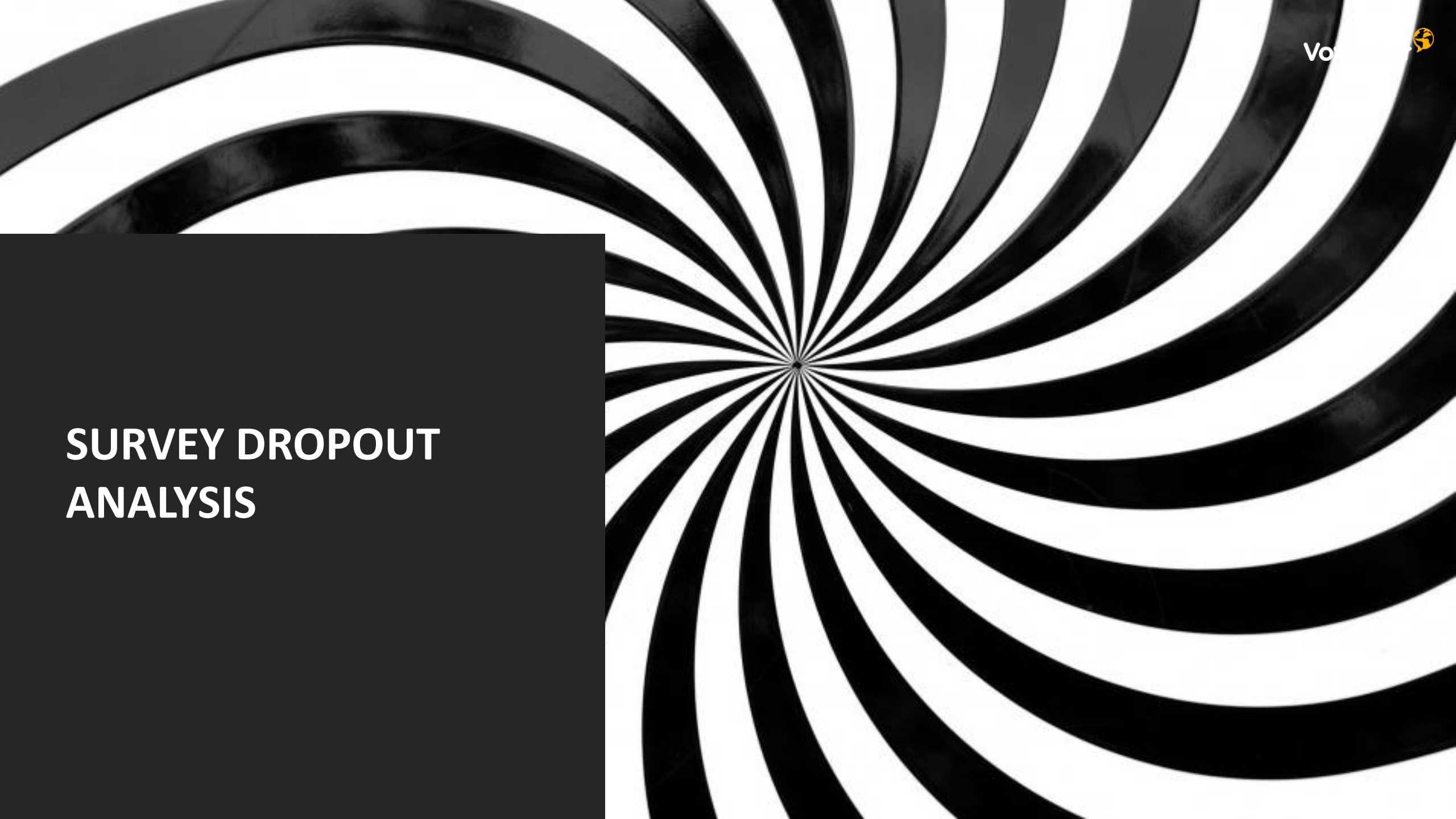
FACTORS AFFECTING WORK VALUES

Work permit nationality

The graph below suggests that especially courier partners from Hungary (76%), Pakistan (78%) and Portugal (75%) report that they prefer working as a self-dependent partner. In comparison, this is the case for only 57% of the courier partners from Poland.



SURVEY DROPOUT ANALYSIS



SURVEY DROPOUT ANALYSIS

Overall dropouts

In order to qualify future studies among courier partners working with Wolt, this analysis also contains a brief survey dropout investigation. Initially, the table below provides an overview of the overall dropout rates.

	Amount Total	Percentage Total	Amount Danish	Amount English
Invited	9079	100 %		
Partly completed	601	6,6 %	228	297
Completed	1512	16,7 %	630	882

SURVEY DROPOUT ANALYSIS

Overall dropouts

The table below shows the dropout rates related to each specific question. First, it must be considered that some respondents in general tend to drop out due to factors such as concerns about anonymity or time commitments which might explain higher dropout rates related to initial questions such as Language and Q1 below. Besides that, this dropout analysis suggests that especially Q5, Q6 and Q7 have somehow been related to higher dropout proportions.

Question	Dropout rate	Dropout rate Danish	Dropout rate English
Language	3,5%		
Q1	4,9%	4,9%	4,8%
Q2	1,8%	1,5%	2,0%
Q3	1,5%	0,9%	1,9%
Q4	1,5%	2,0%	1,2%
Q5	3,3%	3,7%	3,0%
Q6	5,9%	6,4%	5,5%
Q7	3,9%	3,8%	3,9%
Q8	3,7%	4,0%	3,5%
Q9	0,3%	0,6%	0,1%
Q10	0,1%	0,2%	0,0%
Q11	0,0%	0,0%	0,0%
Q12	0,3%	0,0%	0,6%
Q13	0,3%	0,3%	0,3%
Q14	0,3%	0,5%	0,1%
Q15	0,1%	0,0%	0,1%
Q16	0,1%	0,0%	0,2%
Q17	0,2%	0,3%	0,1%
Q19	0,3%	0,2%	0,4%
Q20	0,8%	1,1%	0,6%

Questions related to higher dropouts:

Q5: From the descriptions above, would you rather be a self-dependent partner or an employee in a firm, considering your current situation?

Q6: To what extent does the following affect your general satisfaction with being a courier partner at Wolt in a positive way?

Q7: To what extent does the following affect your general satisfaction with your work life in a negative way?

METHOD

AMERICA AFRICA
ASIA AUSTRALASIA



METHOD

Web interviews

This study has been conducted among courier partners working with Wolt in Denmark. The results are based upon web interviews generated through unique links (e-mail based) sent to each respondent.

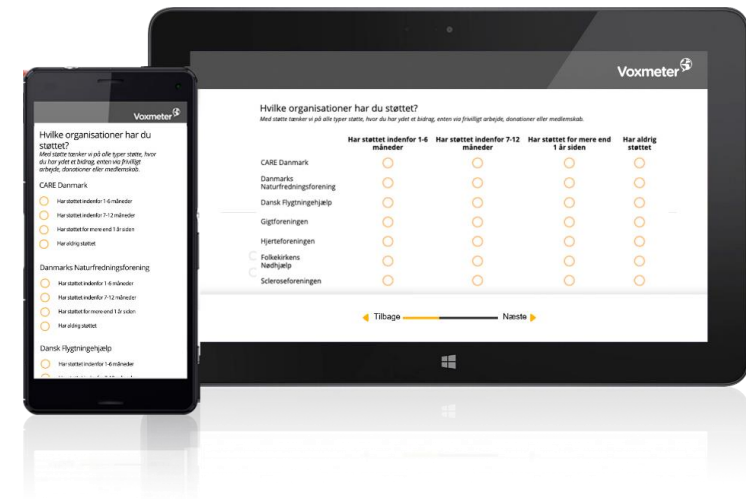
All data obtained from the questionnaires has been treated 100% anonymously by Voxmeter. This has been made clear to all participants in order to ensure their answers to be as open and honest as possible.

Moreover, the questionnaire has been available in both Danish and English in order to ensure that several nationalities have been able to participate.

The final analysis is based upon completed questionnaires from 1512 courier partners operating in Denmark.

Dynamic questionnaires

By always optimizing the technical possibilities of the questionnaires, we ensure high response rates. This means that our surveys are always made in dynamic forms, ensuring adjustment to the units that are used by respondents to fill out the surveys. As an example, the picture below demonstrates how a questionnaire is shown differently on a cell phone and a tablet.



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