# Digital Platform Work in Australia

## Preliminary findings from a national survey

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**This preliminary report, presenting findings from research commissioned by the Victorian Department of Premier and Cabinet, was prepared by:**


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# Table of Contents

# Executive summary

Digital platforms such as Airtasker, Uber or Freelancer can connect workers with individuals or businesses looking to obtain services of various kinds on demand. There has been much debate about 'gig work' of this kind, but little data on its prevalence in Australia. This report presents preliminary findings from a national survey that was commissioned by the Victorian Government to address that gap.

The survey, which elicited more than 14,000 usable responses, explored the prevalence and characteristics of digital platform work in Australia to gain insight into the characteristics and experiences of those participating in such work, and understand the extent to which they combine digital platform work with other forms of paid work. After screening for duplicate and unreliable responses, the sample was representative of the Australian population by age, gender and State/Territory. Some of the main findings are summarised below.

## How prevalent is digital platform work in Australia?

- 7.1% of survey respondents are currently working (or offering to work) through a digital platform or have done so within the last 12 months.[1]
- 13.1% of survey respondents have, at some time, undertaken digital platform work. This rate of participation is similar to recent survey findings in Europe, and higher than some previous estimates for Australia.
- Of the 13.1% (1827 survey respondents) that have undertaken digital platform work, 38.7% have only done work in-person at a specified location. In contrast 28.2% have done computer or internet-based work only, while almost exactly one-third have undertaken both types of work at some time.

## Who is participating in digital platform work?

- A wide variety of people in Australia are seeking work through digital platforms.
- Younger people (aged 18-34) and males are working through digital platforms in higher proportions than other demographic groups. Females are only half as likely as males to work on digital platforms. People are also less likely to participate in platform work as they age.
- New South Wales has the highest levels of participation in digital platform work (14.3% overall, 7.9% currently participating). In comparison, 13.8% of Victorians have undertaken platform work, with 7.4% currently doing so.
- Respondents who live in regional and remote areas are less likely to have undertaken platform work than respondents in a major city.
- Students and the unemployed have higher participation rates. Compared to employed respondents, students are 1.3 times more likely to be doing platform work, and unemployed respondents are twice as likely.
- Respondents who identified as living with a disability, temporary residents, and those who spoke a language other than English at home, were more likely to participate in digital platform work. [2]
- Relative to Australian citizens, temporary residents are three times more likely to be a current platform worker and twice as likely to have been a former platform worker. Permanent residents are 1.7 times more likely than Australian citizens to be current or former platform workers.
- Respondents who speak a language other than English at home are also 1.5 times more likely to be current platform workers.

[1] Throughout the report, 'currently' or 'current workers' includes work undertaken within the last 12 months.
[2] Aboriginal and Torres Strait Islanders were also more likely to participate in digital platform work. However due to the small number of respondents, results may be subject to higher rates of error.

## What digital platforms are currently being used and how do they operate?

- More than 100 different platforms are being used by survey respondents to undertake digital platform work.
- The five most common platforms used by people in Australia currently working on digital platforms are Airtasker (34.8% of platform workers), Uber (22.7%), Freelancer (11.8%), Uber Eats (10.8%) and Deliveroo (8.2%).
- Over one third of current platform workers (35.2%) access work through more than one platform, and 11.4% are registered on four or more platforms. The majority (64.8%), however, access work using only one digital platform.
- Many current platform workers are not aware of the features of the main platform through which they work. For example, over 30% of respondents do not know if the platform has a dispute resolution process. This may be because some workers have not experienced particular features of the platform. It may also reflect some platform features being unclear.
- One in five current platform workers report that worker ratings are not an operational feature of their main platform. Ratings of workers by clients are more common than the reverse.
- Nearly half of respondents currently doing platform work (45.5%) report that their main platform does not cover them for any type of work-related insurance (e.g., work-related injuries or professional indemnity). Nearly the same proportion (39.7%) report that their main platform requires them to take out their own insurance. Over 20% of current platform workers do not know if their platform provides them with insurance or requires them to take out their own.
- According to previous research, the great majority of platforms appear to operate on the basis that the workers who use their services are self-employed. Despite this, over a quarter (28.4%) of current platform workers report that their main platform treats them as employees.

## What type of work is currently being undertaken through digital platforms?

- The types of work that current platform workers are doing include transport and food delivery (18.6% of platform workers), professional services work (16.9%), odd jobs or maintenance work (11.5%), and writing or translation work (9.0%). About 7% of current platform workers perform services in each of the areas of clerical and data entry (7.8%), creative and multimedia work (7.7%), software development and technology (7.2%), and care services (7.0%).
- Respondents doing clerical and data entry, sales and marketing support, writing and translation and caring work are more likely to be women, while men are predominant in software development and technology, transport and food delivery, and skilled trade work.
- Transport and food delivery workers are significantly more likely to be younger (17-34yrs of age), to have indicated temporary residency status, and to speak a language other than English at home, as well as to be working across three or more platforms at once.
- Sales and marketing workers are also more likely to be temporary residents and to speak a language other than English at home.
- Older platform workers (50-64yrs) are more commonly doing professional service or creative and multi-media work, and those in the 35-49 age group are more likely to be clerical and data entry workers.
- Current platform workers indicate that they are not usually required to do additional training or do very little training to undertake digital platform work (35.8% not at all, 29.1% a little). Over 40% believe their digital platform work draws on their qualifications and past experience.

## What income is earned by working through digital platforms?

- Current platform workers are commonly paid per completed task or job (59.0%), rather than for the time or hours they work (22%).
- Digital platform work makes up 100% of the income of only 2.7% of current platform workers.
- Of those currently working through digital platforms, a little more than half (52.3%) consider the income they earned from digital platform work as 'nice to have but can live without it', while 15.4% consider it 'essential for meeting their basic needs'.
- Four in five current platform workers (80.7%), report that digital platform work makes up less than half of their total annual income.
- Those most likely to say that digital platform work is essential for meeting basic needs are respondents living with a disability, unemployed respondents, and those doing care or transport and delivery work.
- When asked what they were earning from their main digital platform, many current workers (40%) did not know how much they earned per hour.
- Of those who indicated their income, the average hourly rate from platform work was $32.16. Professional service workers indicate higher hourly rates (above $50 per hour), and those most likely to be in the lower income bands ($0.01-$9.99 per hour) are clerical and data entry workers, and writing and translation workers. The National Minimum Wage at the time of the survey was $18.93 per hour.

## Patterns of participation in platform work

- Of those respondents currently working on digital platforms, most are new to platform work. Almost half (46.5%) began in the last 12 months and over 60% began less than 2 years ago.
- Engagement with digital platforms varies between a few times per week (27.5% of current platform workers) and less than once per month (28.3%).
- Those participating with greater frequency (once a week or a few times per week) include students and the unemployed, and transport and food delivery workers. Women participate less frequently than men and temporary residents participate more frequently than Australian citizens.
- 14.3% of respondents who participated in digital platform work more than 12 months ago stated that despite attempting to, they 'did not get any work'.
- While a substantial minority of people in Australia are currently undertaking digital platform work, only a very small percentage are spending a large number of hours doing so. Almost half (47.2%) of current platform workers report spending less than 5 hours per week working or offering services through all digital platforms with which they engage, whereas only 5.4% of current platform workers report spending 26+ hours per week. When considered against the full sample of respondents, this represents less than one half of one percent.
- Only 19.2% of current platform workers derive half or more of their income from platform work. When considered against the full sample, this represents around 1.4% of all survey respondents.
- The average weekly hours that current digital platform workers spend working or seeking work on their main digital platform are 10.0 hours per week and men work significantly more hours (10.8 hours) than women (8.2 hours per week). These total weekly hours worked through the main platform may under-estimate the hours spent working on 'all' platforms, considering one-third of platform workers work across multiple platforms.
- An average of 4.9 hours per week is spent on unpaid platform activities designed to obtain work, such as updating profiles, quoting, searching, and bidding for work, through the main digital platform.
- More than one-third of platform workers (37.5%), did not know how many hours per week they spent working on their main digital platform, and an even higher proportion of respondents (46%) did not know how many hours they spent on unpaid tasks.

## Where are digital platform workers and their clients located?

- When doing digital platform work, most current platform workers are working from their home (55.3% of platform workers). Consistent with levels of participation in transport and food delivery driving, 13.9% are working in their car or on their bike.
- Current platform workers in Australia are providing services mostly to Australian clients - 65% of such respondents indicate that their clients are based in Australia only, and a further 25.1% that their clients are from both Australia and overseas.
- Most Australian clients are based in New South Wales (34.4%), Victoria (24.5%), and Queensland (16.6%).

## Why do platform workers participate and how satisfied are they?

- The strongest motivations for undertaking platform work are ‘earning extra money’; ‘working the hours I choose’; ‘doing work that I enjoy’, ‘choosing my own tasks or projects’, ‘working in a place that I choose’ and ‘working for myself and being my own boss’. Less important motivations included ‘finding work despite health issues or disability’, and ‘connecting socially with people’.
- Current platform workers are most satisfied with dimensions of platform work that relate to flexibility: for example; ‘the ability to choose the hours they worked’, ‘working for themselves and being their own boss’, and ‘choosing their own tasks or projects’.
- They are least satisfied with ‘earning a fair income’, ‘accessing work opportunities overseas’, and ‘the fairness of fees and costs associated with work through the platform’.
- Compared to professional service workers and those doing odd jobs and maintenance work, transport and food delivery drivers are significantly less satisfied with the ability to set the price for their services and with gaining new skills or improving existing skills.
- Women are also less satisfied than men with the ability to set the prices for their services. Women are also less satisfied with the fairness of fees and costs associated with the platform.
- A lack of time is the most common reason given for discontinuing platform work (23.8%). Past platform workers often describe platform work as 'too time consuming' or as taking 'too long to complete'.
- One in six respondents (15.3%) who ceased platform work did so because they found full-time (or more suitable) employment, and a further one in six report that the income earned through the platform was insufficient, either in absolute terms or relative to the time investment required.

## Beyond digital platform work - Earning money in the digital economy

- Beyond working, respondents are using digital platforms to earn money through selling, licensing, or renting out goods or other property that they own. When viewed together with data on those working through digital platforms, the data provides insight into the different ways individuals use digital platforms to earn money in Australia.
- Almost half (45.7%) of all survey respondents have earned money in some way through digital platforms, either currently (27.9%) or historically (17.8%). The figures for Victoria are 47.5% earning money in some way and 29.5% within the last 12 months.
- More respondents earn money through selling, licensing or renting out (42.8% overall, 25.2% currently or in the last 12 months) than by working or offering services through digital platforms (13.1% overall, 7.1% in the last 12 months)

## Selling, licensing or renting out through digital platforms

- The most common approach to earning money through digital platforms is selling or licensing goods or creative work through online marketplaces (37.7%), followed by renting out premises (9.1%) and, to a lesser extent, leasing out other property (4.7%) such as car parks, campervans, toys, tools or dresses.
- 42.8% of survey respondents use multiple platforms to sell, license or rent out.
- Gumtree, e-bay, and Facebook Marketplace are the most popular platforms for selling goods or other property.
- Airbnb, was the most popular platform to rent out premises. It has been used to earn money by 15.7% of the respondents who sell, license or rent out (3.5% of all survey respondents).
- A third of survey respondents in this category (33.9%) have been selling, licensing or renting out through digital platforms for more than 5 years.
- A quarter of survey respondents consider the money they earn from selling, licensing or renting out as an important or essential part of their income. The majority (74.4%) describe the income as “nice to have, but can live without it”.

## Consumption through digital platforms

- Within the last 12 months, 62.7% of all survey respondents have bought goods or accessed creative works through online marketplaces, and 29.9% have rented premises from someone else, such as accommodation through Airbnb or office space available through digital platforms. In contrast, only a small proportion (5.7%) have rented a campervan, parking space, car or other goods from someone else through digital platforms.
- Four out of ten survey respondents (41.6%) have obtained services in the previous 12 months through a digital platform where the work was performed in person at a specific location. An additional 7.1% have done so previously but not in the last 12 months.
- In contrast, only 4.6% of all survey respondents have obtained services in the previous 12 months through a digital platform where the work was internet-based or delivered online. An additional 5.5% have done so previously but not within the last 12 months.
- The pattern of consumption in Victoria is broadly similar. In the last 12 months, 62.7% of respondents in Victoria have bought goods or accessed creative works through online marketplaces; 31.2% have rented premises; 5.0% have obtained services where the work was internet-based; and 43.2% have obtained services where the work was performed in person at a specific location.

# About the survey

Digital platforms such as Uber, Airtasker or Freelancer offer apps or websites that can connect potential workers with individuals or businesses looking to obtain services of various kinds on demand. Their use has generated intense debate about the potential impact of what is often now called the 'gig economy'. Yet there has been little data on the extent and impact of digital platform work in Australia. In late 2018, the Victorian Government engaged a team of university researchers to conduct a national survey that would address that gap.

The objectives of the research were to explore the prevalence and characteristics of digital platform work in Australia, gain insight into the characteristics and experiences of those participating in digital platform work, and understand the extent to which they combine digital platform work with other forms of paid work. This summary presents the preliminary findings from the survey data. A more detailed report with further analysis and a discussion of the Australian experience, in the context of existing international research on the gig economy, is currently in production.

## Survey methodology

The survey was designed in collaboration with Victorian Government staff and the On-Demand Workforce Inquiry chair, Natalie James. It was informed by an extensive literature review and similar surveys undertaken in Europe – although it goes beyond those surveys in asking more detailed questions about both current and previous participation. The online survey was branded as a university research survey, distributed by the Online Research Unit (ORU), an Australian-based online survey panel provider. It was tested extensively prior to launch. In accordance with approval obtained from the Queensland University of Technology (QUT) Human Research Ethics Committee (No. 1900000128), survey participants were assured that their responses would remain confidential and anonymous. The survey was launched online on 21 March 2019 and closed on 21 April 2019 when the quota for all male and female respondents aged 18-74 was reached. Australian Demographic Statistics (ABS, June 2018)[3] were used to monitor response rates and ensure the sample was representative of the Australian population in relation to gender, age and State/Territory.

Survey respondents were asked if they had earned or attempted to earn money through digital platforms. This included work that is internet-based or performed at a specific location, or alternatively for the purpose of selling, renting out or licensing goods or other property. All respondents were also asked if they had attempted to obtain labour, goods or other property online. Respondents who indicated experience performing platform work within the last 12 months (current workers) were the primary focus of the survey and they answered the most questions, both in relation to their main platform as well as all platforms (if they worked on multiple platforms). The period of 12 months for current platform workers was chosen to facilitate accurate recall.

Digital platform work requires access to the internet, so the population of interest was adult internet users over 18 years of age. The sample was constructed to be nationally representative using Australian Demographic Statistics (ABS, June 2018) to stratify the sample according to gender, age and State/Territory.

[3] Australian Bureau of Statistics (ABS) (2018) Australian Demographic Statistics, June 2018, cat no 3101.0, https://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/25CFC0B3DB6F25B9CA25836800133985/$File/31010_jun%202018.pdf

## Respondent characteristics

There were 14013 usable responses,[4] which included valid answers to whether the respondent had earned money through digital platforms and essential demographic information (age, sex, State/Territory). The number of responses to different survey questions varied due to respondents choosing not to answer that question or selecting prefer not to answer". The sample was broadly representative by sex, age and State/Territory. However, the sample over-represented respondents with a university qualification and under-represented respondents with no post-school qualification. It also over-represented respondents living in major cities and under-represented respondents in remote areas. To account for this bias, weights were calculated to adjust the sample to take into account highest education level as well as sex, age and State and compare weighted and unweighted proportions of participation. For example, the proportion of all survey respondents who earned any income through digital platform work was 12.3% in the weighted sample and 13.1% in the unweighted sample. Due to these small differences (less than 1% on all measures of participation), and for ease of interpretation, unweighted results have been presented throughout this report.

The main aim of the survey was to understand the extent to which individuals in Australia earn an income by working or offering their services through digital platforms. The survey also gathered data on earning money through selling, licensing or renting out goods or other property through digital platforms. It is acknowledged that earning money by selling, licensing or renting out goods may also involve aspects of work (such as cleaning premises that are being rented out, or preparing creative works for online distribution). However, for the purposes of this study, those performing such activities were distinguished from the focal group – those who offer their services (labour) for hire through digital platforms. Aggregate data on earning money through digital platforms, and data specifically on those who sell, license or rent out goods or other property, are presented towards the end of the report. The remaining sections present the preliminary survey findings, beginning with data on the prevalence and patterns of participation in digital platform work in Australia.

[4] The data were screened to remove duplicate responses (567). This includes responses where the response time was abnormally low (221), responses where answers to adjacent questions suggested insufficient effort (27), and incomplete surveys (337). Before commencing the survey, 1882 respondents were screened out because they were outside the 18-74 age range or because the desired quota had been reached.

# Prevalence and patterns of digital platform work in Australia

This section looks at the extent to which survey respondents in Australia have offered services or undertaken work through digital platforms either currently or in the past. Throughout the results, 'current participation' refers to participation within the past 12 months.

## Prevalence of earning an income by working through digital platforms

Of those surveyed, 13.1% indicated that they have, at some time, participated in digital platform work (Table 1).

A substantial minority continue to do so – 7.1% of respondents were currently offering services or doing work mediated by a digital platform or they had done so within the last 12 months.

The total participation rate of 13.1% is broadly consistent with survey findings from Europe. For example, 12.6% of the United Kingdom's population of internet users undertake platform work. In Spain the participation rate of internet users is 15.1%, Germany 11.8%, Netherlands 10.6% and France 8.8%.[5] The Australian participation rate is larger than suggested by some previous estimates,[6] which were based on extrapolations from figures published by platform businesses. Prior estimates also date back to 2015–16, when it seems likely that there were many fewer platform workers and indeed fewer platforms.

Although the survey presents data from a single point in time, the fact that the proportion of respondents reporting current or recent participation was higher than those reporting participation at any point in the past might suggest that the rate of participation has increased compared to previous years. Taken together with the data on duration of participation noted later in this report, there are also signs of significant turnover amongst participants.

Table 1 Current, previous or no engagement with work through digital platforms (n=14013)

| Earns income working or offering services through a digital platform | N | % |
|---|---|---|
| Has never earned an income working or offering services through a platform | 12186 | 86.9 |
| Has previously earned an income working or offering services through a platform but not in the last 12 months | 839 | 6.0 |
| Currently or in the last 12 months has earned an income working or offering services through a platform | 988 | 7.1 |
| **Total** | **14013** | **100** |

The majority (86.9%) of survey respondents indicated they neither currently nor formerly participated in digital platform work of any kind (Table 1).

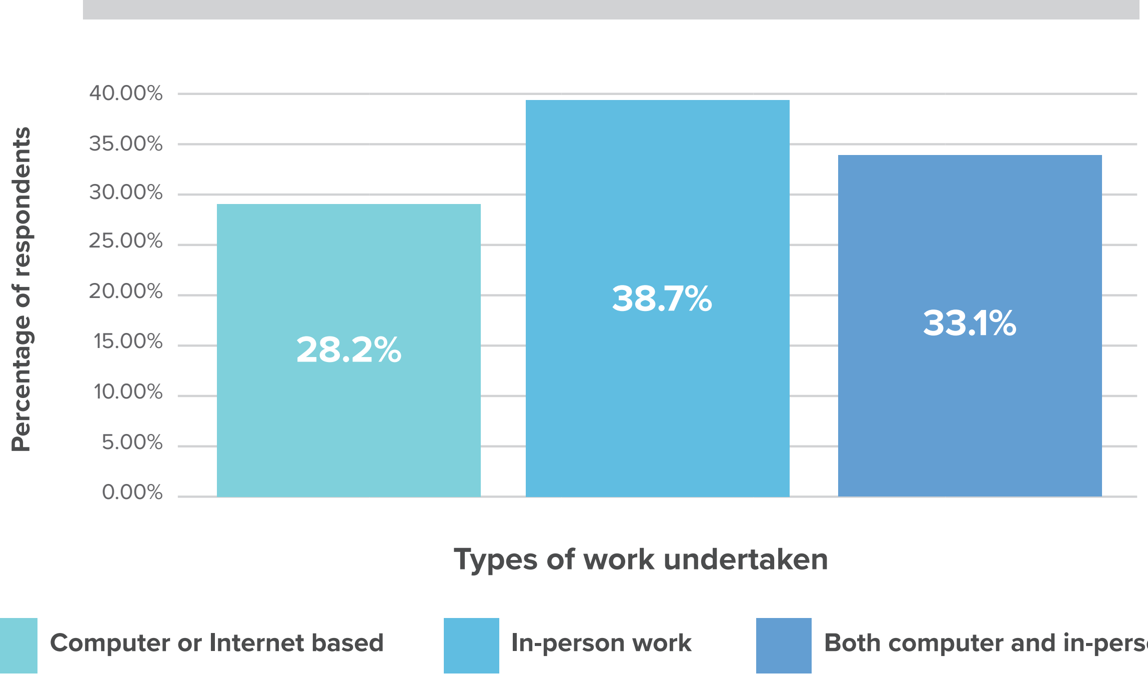
[5] Pesole, A., Brancati, U., Fernández-Macías, E., Biagi, F., & González Vázquez, I. (2018), Platform Workers in Europe: Evidence from the COLLEEM Survey, Luxembourg: Publications Office of the European Union. The COLLEEM survey covers 14 EU Member States: Germany, Netherlands, Spain, Finland, Slovakia, Hungary, Sweden, United Kingdom, Croatia, France, Romania, Lithuania, Italy, Portugal.

[6] See, for example, Minifie, J. (2016), Peer-to-Peer Pressure: Policy for the Sharing Economy, Report No 2016-7, Melbourne: Grattan Institute, 33-34; Deloitte Access Economics (2017), Developments in the Collaborative Economy in NSW, Sydney, NSW, Australia: Deloitte Touche Tohmatsu, 4-6 (available at: https://www2.deloitte.com/au/en/pages/economics/articles/review-collaborative-economy-nsw.html).

Figure 1 shows the proportion of workers undertaking different types of work, either in person at a specified location, or work that is computer or internet based.

Of the 1827 respondents who had undertaken digital platform work either currently or more than 12 months ago, 28.2% said they had done work that was computer or internet-based but NOT in-person work and 38.7% had done in-person work at a specified location but NOT computer or internet-based work. Almost exactly one-third of platform workers (33.1%) had undertaken BOTH types of platform work at some time.

Figure 1: Participation by type of digital platform work (n=1827)




## Participation in digital platform work by demographic characteristics

The demographic characteristics of survey respondents who had earned an income through working or offering services through digital platforms are provided in Table 2. Respondents who earned money through selling, renting out or licensing goods or other property via platforms such as Gumtree, Airbnb, or iStock, but did not earn an income working through digital platforms, are included in the "No" column in this table.

The results presented in Table 2 show that higher proportions of younger people (aged 18-34) and males were working through digital platforms. In terms of location, New South Wales had the highest levels of participation in digital platform work at 14.3% (7.9% current and 6.4% previous). In comparison, 13.8% of Victorians had undertaken platform work, with 7.4% currently doing so. High proportions of Aboriginal and Torres Strait Islanders were also found to have participated although the number of respondents in this category was small and hence subject to high margins of error. Respondents who were students or unemployed also had higher participation rates than those who were employed, retired, full-time homemakers or volunteers. Those with higher levels of education (particularly bachelor or postgraduate degrees) were also more likely to work through digital platforms than respondents with lower levels of education.

Table 2 Participation in digital platform work by demographic characteristics (n = 14,013)

| | | Have you earned income by working or offering services through digital platforms? | | | |
|---|---|---|---|---|---|
| | | No | Yes but not in the last 12 months | Yes, currently or within the last 12 months | N |
| Age | 18-34 | 80.0 | 9.0 | 11.0 | 4731 |
| | 35-49 | 85.6 | 6.0 | 8.4 | 3885 |
| | 50-64 | 93.2 | 3.3 | 3.5 | 3535 |
| | 65-74 | 95.7 | 3.1* | 1.1* | 1854 |
| Sex | Female | 90.6 | 4.4 | 5.0 | 6943 |
| | Male | 83.4 | 7.5 | 9.1 | 7036 |
| State or Territory | Australian Capital Territory | 86.1 | 6.1** | 7.8* | 244 |
| | New South Wales | 85.7 | 6.4 | 7.9 | 4453 |
| | Northern Territory | 92.1 | N<5 | 5.0** | 139 |
| | Queensland | 88.3 | 5.6 | 6.1 | 2809 |
| | South Australia | 89.0 | 4.2* | 6.8* | 1001 |
| | Tasmania | 88.4 | 6.1* | 5.5* | 311 |
| | Victoria | 86.2 | 6.4 | 7.4 | 3642 |
| | Western Australia | 88.3 | 5.7* | 5.9* | 1414 |
| Location | Major cities | 85.7 | 6.5 | 7.8 | 11196 |
| | Inner regional | 93.0 | 3.4* | 3.6* | 1876 |
| | Outer regional | 91.6 | 4.5* | 3.9* | 726 |
| | Remote | 89.5 | 6.5** | 4.0** | 124 |
| | Very remote | 90.6 | N<5 | N<5 | 32 |
| Living with a disability | No | 87.3 | 5.9 | 6.8 | 12909 |
| | Yes | 85.6 | 6.5* | 7.9* | 868 |
| | Prefer not to say | 76.2 | 10.0* | 13.9* | 231 |
| Aboriginal or Torres Strait Islander | Yes | 73.1 | 10.0* | 16.9* | 201 |
| | No | 87.4 | 5.9 | 6.8 | 13640 |
| | Prefer not to say | 72.9 | 10.8* | 16.3* | 166 |
| Non-English speaking background | Yes | 77.2 | 9.8 | 13.0 | 2537 |
| | No | 89.4 | 5.1 | 5.6 | 11337 |
| | Prefer not to say | 69.9 | 11.8* | 18.4* | 136 |
| Highest education level | Less than Year 12 | 91.8 | 3.3* | 4.8* | 784 |
| | Year 12 or equivalent | 91.9 | 4.0* | 4.1* | 1821 |
| | Vocational qualification | 89.3 | 4.7 | 6.0 | 4161 |
| | Bachelor degree | 83.1 | 8.0 | 8.9 | 4190 |
| | Postgraduate qualification | 85.0 | 6.9 | 8.1 | 3051 |
| Labour force status | Employee or self-employed | 85.5 | 6.5 | 8.0 | 9650 |
| | Unemployed | 79.3 | 7.4* | 13.2 | 363 |
| | Student | 77.9 | 9.8* | 12.3* | 642 |
| | Retired | 95.7 | 2.7* | 1.5* | 2222 |
| | Full-time homemaker, or unpaid carer | 90.1 | 5.9* | 4.0* | 677 |
| | Volunteer | 85.5 | 5.8** | 8.7** | 138 |
| | Other, not in the labour force | 91.6 | 3.5** | 4.8** | 311 |
| Household status | Single, no children | 85.8 | 6.5 | 7.8 | 3983 |
| | Single with at least one child living with you | 85.6 | 6.5* | 7.9* | 582 |
| | Couple without children | 84.5 | 7.2 | 8.3 | 3270 |
| | Couple with at least one child living with you | 85.9 | 6.1 | 8.0 | 3609 |
| | Couple with children who do not live with you | 94.4 | 3.1* | 2.4* | 2107 |
| | Other | 92.0 | 4.0* | 4.0* | 450 |

*Note: ** Relative Standard Error > 25% * Relative Standard Error > 10% Unweighted N=14013*

## Likelihood of participation in platform work

Consistent with the patterns of participation described in Table 2 (demographics), further analysis[7] confirms that younger people (18-34 years of age) were more likely to participate in platform work, and that individuals were less likely to participate in platform work as they age. Results are similar for former platform workers, except that the likelihood of having participated increased slightly again among the 65-74 age group.

Gender is a statistically significant indicator of participation in platform work. Even taking into consideration that overall in Australia, men have a higher labour market participation rate than women,[8] female respondents were only half as likely as males to work on digital platforms.

State or Territory of residence did not significantly affect the likelihood of platform work, however location did. Respondents in regional and remote areas were less likely than those in a major city to be current or former platform workers.

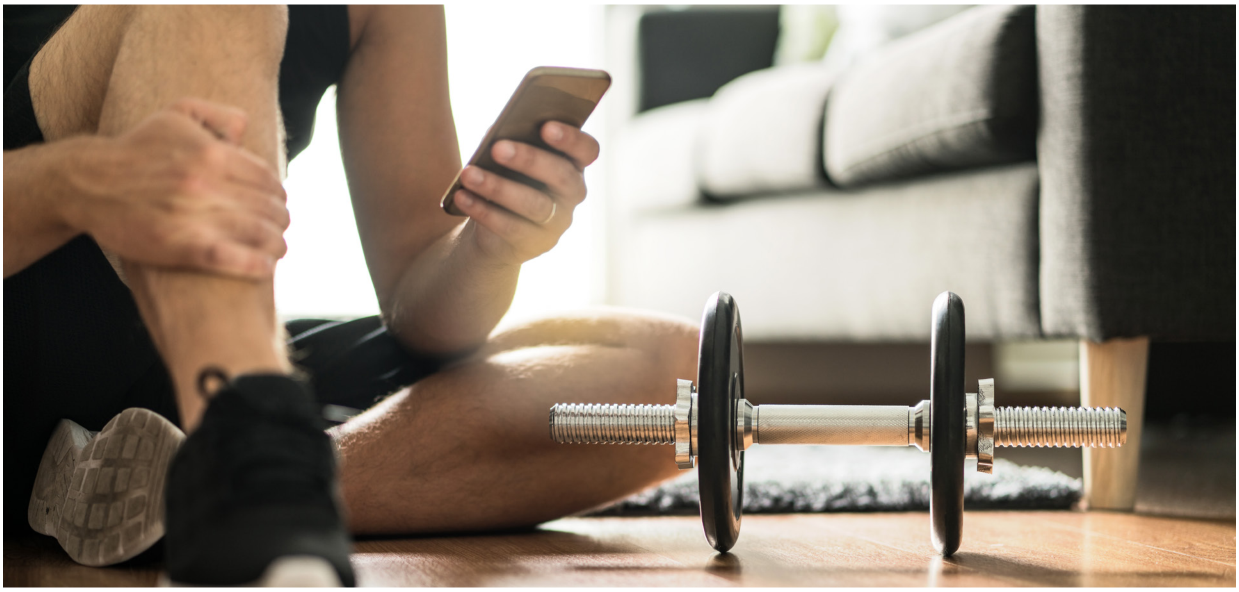
Citizenship status had a large impact on the odds of participating in platform work, especially for current platform workers. Relative to Australian citizens, temporary residents were three times more likely to be a current platform worker and twice as likely to have been a former platform worker (more than 12 months ago). Permanent residents were 1.7 times more likely than Australian citizens to be current or former platform workers.

People who speak a language other than English at home, Aboriginal and Torres Strait Islanders and respondents with a disability were all more likely to be current platform workers than respondents without those characteristics. These results were consistent for former platform workers. Results for Aboriginal and Torres Strait Islanders need to be interpreted with caution, however, given the small number of respondents (n=201).

Although higher levels of education appear to predict participation in platform work (see Table 4), these results need to be interpreted with caution. As noted in the Methodology section, the sample over-represented respondents with a university qualification and under-represented respondents with no post-school qualifications.

Labour force status also had an impact on the likelihood of engaging in platform work. Unemployed respondents and volunteers were two times more likely than individuals who were employed/self-employed to be current platform workers. Students were 1.3 times more likely than employed/self-employed individuals to be current platform workers.

Further analysis using these demographic characteristics is presented throughout this report.



[7] To identify which demographic characteristics affect the likelihood of participating in platform work, a multinomial logistic regression was conducted.

[8] Australian Bureau of Statistics (2018), *Gender Indicators, Australia*, Catalogue 4125.0, Canberra: ABS.

# Current participation in digital platform work

The prior section summarised the characteristics of survey respondents who indicated that they had at some stage undertaken work through a digital platform. It included those who were currently working or had recently done so (within the last 12 months), and those who participated at any time prior to 12 months ago.

This section takes a detailed look at respondents who were currently (or in the last 12 months) working through digital platforms. This section presents data on respondents who worked or offered services where the work was computer or internet-based, or services which were provided or offered in-person.

The focus is on the digital platforms that people in Australia access, and the types of work they undertake through these platforms. This section also reports on workers' experiences of digital platform work, such as hours of work, location of work, earnings, conditions, and motivations and satisfaction with digital platform work.

## Most common platforms

The five most common platforms used by current platform workers within the last 12 months were Airtasker (34.8%), Uber (22.7%), Freelancer (11.8%), Uber Eats (10.8%) and Deliveroo (8.2%). Table 3 shows the percentage of current workers who worked or offered services through each platform and demonstrates the wide variety of platform businesses through which survey respondents currently seek and/or undertake work.

Table 3 also suggests that the platforms on which people most commonly worked were those offering transport and food delivery work. Transport and food delivery platforms were selected over 600 times by respondents (more than one platform could be selected), and there were eight different platforms currently being used by transport and delivery drivers to earn an income.

'All other platforms' included a further 68 platforms nominated less than three times each. Excluded from the table are responses where the data was invalid because it was incomplete, could not be verified as a genuine platform, nominated selling, renting or licensing platforms rather than those involving work (23), or identified social media sites (94) rather than platforms that mediated work.

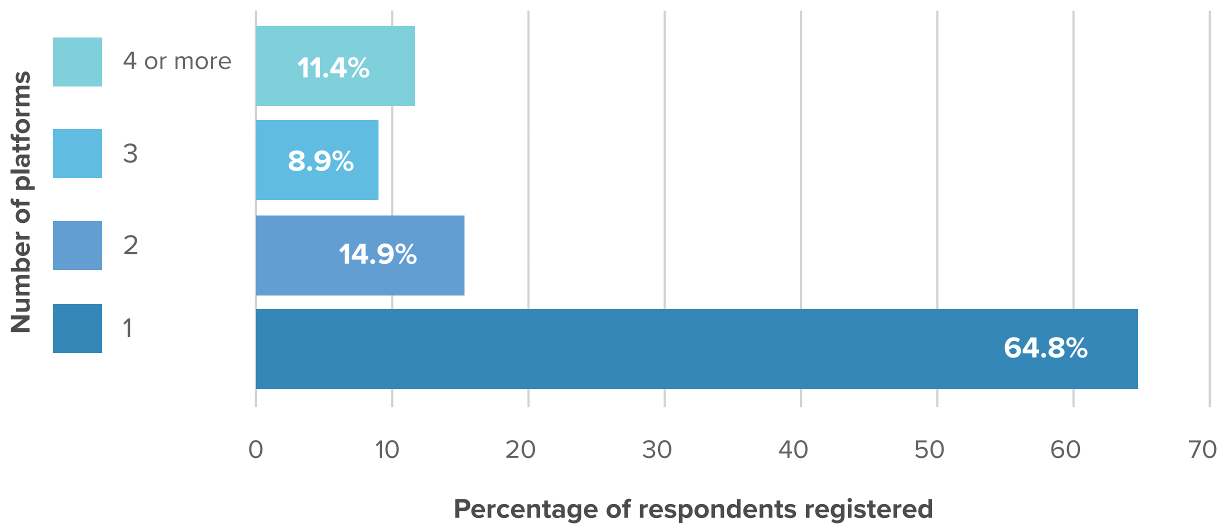
Table 3 Platforms used currently or within last 12 months

| Platform | Type(s) of work performed on the platform - Category | Count | % |
|---|---|---|---|
| Airtasker | All categories | 348 | 34.8% |
| Uber | Transport & food delivery | 228 | 22.7% |
| Freelancer | Clerical & data entry; creative & multimedia; writing & translation; sales & marketing; software development; professional services | 118 | 11.8% |
| Uber Eats | Transport & food delivery | 108 | 10.8% |
| Deliveroo | Transport & food delivery | 82 | 8.2% |
| Ola Cabs | Transport & food delivery | 72 | 7.2% |
| Upwork** | Clerical & data entry; creative & multimedia; writing & translation; sales & marketing; software development; professional services | 62 | 6.2% |
| Fiverr | Creative & multimedia; writing & translation; sales & marketing; software development & technology | 60 | 6.0% |
| Amazon Turk | Software development & technology; clerical & data entry | 55 | 5.5% |
| Foodora | Transport & food delivery | 52 | 5.2% |
| Taxify | Transport & food delivery | 52 | 5.2% |
| MadPaws | Caring | 45 | 4.5% |
| Sidekicker | Clerical & data entry; odd jobs & maintenance; sales & marketing | 35 | 3.5% |
| Care.com | Caring | 34 | 3.4% |
| Guru | Clerical & data entry; creative & multimedia; writing & translation; sales & marketing; software development; professional services | 34 | 3.4% |
| Careseekers | Caring | 33 | 3.3% |
| Hipages | Skilled trades | 30 | 3.0% |
| ODesk** | Clerical & data entry; creative & multimedia; writing & translation; sales & marketing; software development; professional services | 30 | 3.0% |
| PeoplePerHour | Clerical & data entry; creative & multimedia; writing & translation; sales & marketing; software development. | 25 | 2.5% |
| Oneflare | Odd Jobs & Maintenance; Creative & Multi-media; Skilled Trades | 25 | 2.5% |
| 99designs | Creative & Multi-media | 24 | 2.4% |
| TaskRabbit | Odd jobs & maintenance | 22 | 2.2% |
| Lyft | Transport & food delivery | 21 | 2.1% |
| Helpling | Odd jobs & maintenance | 18 | 1.8% |
| Mable | Caring – disability care | 17 | 1.7% |
| Dribbble | Creative & multimedia | 12 | 1.2% |
| Toptal | Professional services; software development; creative & multimedia | 9 | 0.9% |
| GLG | Professional services | 8 | 0.8% |
| Pawshake | Caring | 8 | 0.8% |
| Rev | Writing & translation; clerical & data entry | 8 | 0.8% |
| Hireup | Caring | 6 | 0.6% |
| Sherpa | Transport & delivery | 4 | 0.4% |
| Appen | Writing & translation; clerical & data entry | 3 | 0.3% |
| TRIBE | Sales & marketing | 3 | 0.3% |
| All Other Platforms | | 78 | 7.7% |
| **Total** | | **1777*** | **176.7%** |

** Excluding invalid responses. ** Upwork was formerly oDesk; however, both are reported here as separate platforms reflecting the responses from survey participants.*

Approximately one-third of current platform workers were working across multiple platforms, including 11.4% who were registered with four or more platforms (see Figure 2).

Figure 2 Proportion of participants working across numbers of platforms




## Experiences of current digital platform workers on their main platform

Current platform workers were asked to nominate the main platform they used. The distribution of main platforms was very similar to that of all platforms currently used (see Table 3); that is, Airtasker, Uber, Freelancer and Uber Eats were most commonly cited as the main platform. When asked to specify the type of work they did through their main platform, transport and delivery driving was again most frequently nominated - 18.6% of respondents provided transport or food delivery services (see Table 4).

Professional services work (such as financial, legal and consulting services) was also frequently indicated as the type of work performed through the main digital platform (16.9% of respondents) (Table 4). This is consistent with Table 3, which shows 11.8% of current platform workers worked through Freelancer and 6.2% through Upwork. A further four platforms were being used to do professional services work.

Over 10% of current workers were doing odd jobs or maintenance work through digital platforms. This was most likely to be through the most popular platform Airtasker, listed by 34.8% of current workers. Although only 7% of current platform workers said they did care work through digital platforms, six different care platforms were identified, including several providing pet care services only.

Table 4 Type of work performed through main digital platform

| Type of work digital platform work | | N | % |
|---|---|---|---|
| Transport and food delivery | *(e.g., taxi services; food delivery; package or goods delivery)* | 183 | 18.6 |
| Professional services | *(e.g., accounting; consulting; financial planning; legal services; human resources; project management)* | 167 | 16.9 |
| Odd jobs and maintenance work | *(e.g., running errands; general maintenance duties; removalist)* | 113 | 11.5 |
| Writing and translation | *(e.g., academic writing; article writing; copywriting; creative writing; technical writing; translation)* | 89 | 9.0 |
| Clerical and data entry | *(e.g., customer service; data entry; transcription; tech support; Web research; virtual assistant)* | 77 | 7.8 |
| Creative and multimedia | *(e.g., animation; architecture; audio; logo design; photography; presentations; voice overs video)* | 76 | 7.7 |
| Software development and technology | *(e.g., data science; game development; app, software or web development; server maintenance; web scraping)* | 71 | 7.2 |
| Caring | *(e.g., aged or disability care; pet services; babysitting; nanny services)* | 69 | 7.0 |
| Skilled trades work | *(e.g., carpentry; plumbing; electrical work)* | 57 | 5.8 |
| Sales and marketing support | *(e.g., social media marketing; ad posting; lead generation; search engine optimisation; telemarketing)* | 49 | 5.0 |
| Education | *(e.g., tutoring; teaching; mentoring; online coaching)* | 12 | 1.2 |
| Personal services | *(e.g., sport/fitness coaching; massage; adult entertainment; tattoo and piercing)* | 9 | 0.9 |
| Unknown or insufficient detail | | 14 | 1.4 |
| **Total** | | **986** | **100** |

A series of further analyses of the type of work by demographic characteristics revealed that age was significantly associated with type of platform work, as was gender, non-English speaking background and residency status.[9]

Transport and food delivery workers were more likely to be 18-34 years of age. Professional service workers and creative and multimedia workers were more likely to be in the older age category of 50- 64 years old, whereas clerical and data entry workers were more likely to be in the age category of 35-49 years.

Workers in clerical and data entry, sales and marketing support, writing and translation, and caring were more likely to be women. In contrast, software development and technology workers, transport and food delivery workers, and skilled trade workers were more likely to be men. These patterns suggest that digital platform work may replicate the gender-based occupational segregation that occurs in the wider labour market.

[9] A series of Chi-square tests were conducted to determine if demographic categories were related to the type of work performed on the main platform. Results are reported only where cell sizes were large enough to make confident assertions. Age: Chi2 (39, n = 994) = 66.39, p < .05); gender: Chi2 (13, n = 988) = 101.47, p < .001); residency status: Chi2 (26, n = 961) = 50.78, p < .05; non-English speaking background: Chi2 (13, n = 967) = 41.01, p < .001; State/Territory: Chi2 (91, n = 994) = 192.2, p < .001; Number of platforms: Chi2 (39, n = 991) = 54.80, p < .05.

Transport and food delivery workers were significantly more likely to indicate temporary residency status and were less likely to be Australian citizens. Sales and marketing workers were also more likely to be temporary residents. This was not the case for professional service workers and clerical and data entry workers.

Transport and food delivery workers, and sales and marketing workers, along with software development and technology workers, were also more likely to speak a language other than English at home.

No significant differences were found across type of work in relation to disability or Aboriginal or Torres Strait Islander status.

State/Territory location was significantly associated with type of platform work although interpretation was made difficult due to the small number of individuals who engaged in particular forms of work in each State, especially in the smaller States. There were no worker categories which were over-represented or under-represented in Victoria.

Transport and food delivery workers had a high likelihood of working on three platforms, or four or more platforms, and were significantly less likely to be working on just one platform.

## Payment and earnings for work undertaken through the main platform

Current platform workers were asked questions about the processes and amounts they were paid for the performance of work through their main digital platform: that is, the platform on which they had spent the most time offering their services and doing work.

As presented in Table 5, most workers (59.0%) were paid via the platform for each completed task or job, while 22% were paid for the hours they worked.

Table 5 Basis of payment on main platform

| Basis of payment | N | % |
|---|---|---|
| I am paid per completed task or job | 579 | 59.0 |
| I am paid for the time or hours I work | 216 | 22.0 |
| I receive a fixed daily/weekly/monthly income | 50 | 5.1 |
| A combination of some or all of the above | 75 | 7.6 |
| I don't know | 62 | 6.3 |
| **Total** | **982** | **100.0** |

Current platform workers were also asked to estimate approximately how much per hour (in pre-tax Australian dollars) they usually got paid for tasks undertaken through their main digital platform (Table 6). Forty percent of current platform workers answered 'I don't know' to this question, suggesting either that they had never calculated this amount or if they had, it was not easy to recall. For those who did estimate their hourly income, the median response for pre-tax dollars per hour was $25.00 and the mean (with the top and bottom 5% of responses trimmed) was $32.16 per hour. The median income for males and females was not significantly different. The mean response (again with the top and bottom 5% of responses trimmed) was $33.45 for males and $30.78 for females.

Table 6 Approximate amount per hour earned on main platform

| Amount per hour | N | % |
|---|---|---|
| Zero dollars | 7 | 0.7 |
| $0.01 - $9.99 | 41 | 4.1 |
| $10.00 - $14.99 | 42 | 4.2 |
| $15.00 - $19.99 | 57 | 5.8 |
| $20.00 - $29.99 | 181 | 18.3 |
| $30.00 - $39.99 | 97 | 9.8 |
| $40.00 - $49.99 | 42 | 4.2 |
| $50.00 - $74.99 | 57 | 5.8 |
| $75.00 - $99.99 | 21 | 2.2 |
| $100 or more | 49 | 4.9 |
| Do not know | 394 | 40.0 |
| **Total** | **988** | **100.0** |

Current workers' income per hour estimates were compared against type of platform work (see Table 7). There were sizeable differences in the approximate earnings per hour based on the type of work performed on the main platform. Professional service workers were significantly more likely to indicate higher per-hour income bands than other workers (e.g., $50.00-$74.99; $75.00-$99.99; $100+).[10]

Transport and food delivery workers were over-represented in the $15.00-$19.99 and $20.00-$29.99 income categories. Carers frequently indicated their income category as $20.00-$29.99 per hour. The National Minimum Wage at the time of the survey was $18.93 per hour, and from 1 July 2019 it will be $19.49 per hour.

Those most likely to be in the lower income bands, and earning less than the current minimum wage, were clerical and data entry workers ($0.01-$9.99 and $10.00-$14.99) and workers engaged in writing and translation ($0.01-$9.99).

[10] Chi-square analysis showed significant differences between income per hour estimates and type of platform work: Chi2 (130, n = 986) = 278.42, p < .001. Findings are only reported where cell size was adequate for reliable interpretation.

Table 7 Average approximate amount per hour earned by type of work on main platform

| Type of work | Median ($ per hour) | Trimmed Mean ($ per hour) | N |
|---|---|---|---|
| Professional services | 40.00 | 56.85 | 102 |
| Clerical and data entry | 20.00 | 19.85 | 39 |
| Creative and multimedia | 34.00 | 40.12 | 42 |
| Sales and marketing support | 40.00 | 53.09 | 28 |
| Software development and technology | 30.00 | 46.21 | 44 |
| Writing and translation | 21.00 | 27.91 | 56 |
| Caring | 23.50 | 21.60 | 50 |
| Transport and food delivery | 20.00 | 22.19 | 120 |
| Skilled trades work | 30.00 | 41.53 | 35 |
| Odd jobs and maintenance work | 23.00 | 26.93 | 57 |
| Education | 40.00 | 37.25 | 11 |
| Personal services | 45.00 | 45.65 | 6 |

## Time spent on main platform

Current platform workers were asked how many hours per week they spent working or seeking work through the main digital platform (Table 8). More than one-third of current workers (37.5%) responded 'I don't know' to this question.

For the remainder who estimated their weekly hours (excluding outliers) the mean was 10.0 hours per week. Men worked significantly more hours than women. Men worked an average of 10.8 hours and women worked an average of 8.2 hours per week.[11]

Table 8 shows mean weekly hours across the different types of platform work (again, excluding outliers).

Mean weekly hours in all type of work categories were less than 15.

Workers in the transport and food delivery, software development and technology, and sales and marketing support categories worked the longest weekly hours on average (14.5, 14.3 and 12.3 hours respectively).

The shortest mean weekly hours were in creative and multi-media (6.4) and education work (3.4 hours).

Note here that many respondents indicated that they work across more than one platform (see Figure 2). Some workers, such as transport and food delivery drivers, may have the ability to work on multiple platforms concurrently. Results for time spent on the main platform are therefore likely to be an underestimate of the hours spent participating in digital platform work.

[11] $t(551)=2.18$, base $p<.05$.

Table 8 Mean weekly hours by type of work on main platform

| Type of work on main platform | N | Mean weekly hours (trimmed) |
|---|---|---|
| Transport and food delivery | 140 | 14.5 |
| Software development and technology | 44 | 14.3 |
| Sales and marketing support | 27 | 12.3 |
| Skilled trades work | 36 | 8.9 |
| Odd jobs and maintenance work | 60 | 8.8 |
| Caring | 38 | 8.6 |
| Clerical and data entry | 44 | 8.5 |
| Personal services | 6 | 8.0 |
| Writing and translation | 59 | 7.9 |
| Professional services | 105 | 7.7 |
| Creative and multi-media | 44 | 6.4 |
| Education | 9 | 3.4 |

Current workers were also asked how many of these hours on average were spent searching, quoting or bidding for work, updating their profile, posting information, or doing other UNPAID tasks. Nearly half (46%) of current digital platform workers answered 'I don't know' to this question, suggesting that they had never calculated these hours or that they did not recall.

Acknowledging that answers were likely to be an approximation, for those who did estimate these weekly hours, the mean was 4.9 hours per week on unpaid tasks, with no significant differences in the time spent by men and women on unpaid tasks.

When viewed by type of work, those at the lower end of average weekly hours spent on unpaid tasks were current workers in education (1.3 hours), personal services (3.0 hours), professional services (4.0 hours) and skilled trades work (3.5 hours).

Current digital platform workers in sales and marking support (7.1 hours), software development and technology (5.9 hours), transport and food delivery (5.2 hours) and odd jobs and maintenance work (6.8 hours), spent the most time on unpaid tasks.

Collectively, workers in software development and technology, transport and food delivery, and sales and marketing were currently spending the most time each week engaging in paid and unpaid tasks through digital platforms.

## Operations of the main digital platform

Current platform workers were asked a series of questions about the operations of the main platform on which they worked. As shown in Table 9, a substantial minority of respondents answered 'I don't know' to each item (between 16% and 33%). In some cases, that might simply reflect workers not having experienced situations in which the relevant knowledge would be expected: as, for example, with those who were unaware of whether their main platform had a dispute resolution process, or whether it would allow a substitute or assisting worker to be arranged, or whether the platform charged for priority work opportunities. By contrast, it seems notable that over a quarter of workers did not know whether the relevant platform could restrict access in the event of unsatisfactory work or whether the platform could change any of the contractual terms and conditions under which their work was performed.

Table 9 How the main digital platform operates

| Digital platform operations | Yes | No | I don't know |
|---|---|---|---|
| **Information and communication** | | | |
| The platform provides information on the regulations with which I have to comply (e.g., tax, superannuation, GST) | 41.2 | 33.5 | 25.3 |
| The platform has a dispute settlement process | 46.6 | 21.4 | 32.0 |
| The platform has someone available that I can contact if I have a problem or concern | 58.6 | 19.7 | 21.7 |
| The platform allows for me to be rated by clients | 64.9 | 19.1 | 16.0 |
| The platform allows me to rate the clients for whom I work | 53.4 | 28.3 | 18.3 |
| The platform allows me to provide feedback about the platform itself, its website, app or processes | 56.5 | 23.5 | 20.0 |
| **Fees and charges** | | | |
| The platform covers me with at least one type of work-related insurance (e.g., for work-related injuries or professional indemnity) | 28.9 | 45.5 | 25.6 |
| The platform requires me to take out my own insurance | 39.7 | 37.9 | 22.4 |
| The platform charges me a fee (e.g., a subscription cost) to register or access work | 36.1 | 47.4 | 16.5 |
| The platform charges for priority work opportunities | 31.8 | 42.9 | 25.3 |
| The platform requires me to pay a set amount or percentage of what I earn through the platform | 48.4 | 35.3 | 16.4 |
| **Access to the platform** | | | |
| The platform requires me to supply an Australian business number (ABN) | 41.6 | 40.7 | 17.7 |
| The platform can restrict access to work opportunities if my work is not satisfactory | 47.9 | 25.4 | 26.7 |
| The platform has changed my contract or terms and conditions | 29.8 | 43.6 | 26.6 |
| **Worker-platform relationship** | | | |
| The platform treats me as its employee | 28.4 | 53.0 | 18.6 |
| The platform requires me to display its brand or logo (e.g., on clothing, equipment or documents) when performing work or dealing with clients | 29.4 | 53.7 | 16.9 |
| I am required by the platform to be available to work either at particular times, or for at least a minimum amount of time | 28.2 | 56.3 | 15.5 |
| The platform penalises me for declining work | 22.8 | 56.0 | 21.2 |
| The platform allows me to arrange for work I have accepted to be performed by someone else on my behalf, or for someone else to help me | 32.5 | 41.6 | 25.9 |
| The platform allows me to work for a client that I originally met through the platform, without having to use the platform | 33.8 | 41.9 | 24.3 |
| The platform supplies me with the equipment or facilities (such as a computer, internet access, vehicle etc.) that I need to perform the work | 23.5 | 61.9 | 14.6 |
| I can contact other workers who are using the platform, through the platform itself | 34.8 | 41.0 | 24.2 |

The different features of platform operations have been categorised in Table 9 into four themes: information and communication; fees and charges; access to the platform; and work-platform relationships.

In general, current platform workers were most aware of features relating to communication and information, notably rating and review systems. Ratings of workers by clients was reported to be more common than the reverse. Worker ratings were perhaps not quite as prevalent as might have been expected, with one in five platform workers reporting them not to be a feature of their main platform.

In relation to fees and charges, 28.9% of current platform workers were provided with at least one type of work-related insurance by the platform, yet nearly half of current platform workers (45.5%) reported that their main platform did not cover them (e.g., for work-related injuries or professional indemnity). Nearly the same proportion (39.7%) reported that their main platform required them to take out their own insurance. Over 20% of current platform workers did not know if the platform required them to take out their own insurance, or if the platform provided insurance. Nearly one-third of current platform workers (36.1%) reported that their main platform charged a fee for registering or accessing work and 31.8% reported their main platform charged for priority work opportunities.

With respect to the platform-worker relationship, more than one-third (34.8%) said they could contact other workers who are using the platform through the platform itself. However, 41% indicated that they could not do this. Nearly one-quarter of current platform workers (22.8%) could be penalised by the platform for declining work.

According to previous research, the great majority of platforms appear to operate on the basis that the workers who use their services are not employees, but rather independent, self-employed workers, or 'freelancers'. It is striking then that over a quarter (28.4%) of platform workers nevertheless reported that their main platform treated them as employees. It is unclear whether these workers believed that they were actually employees for legal purposes, or simply that their treatment made them feel like employees.

## Use of previous skills on main platform

Current platform workers were not usually required to do additional training to undertake digital platform work (35.8% not at all, 29.1% a little).

Table 10 shows that respondents who were currently participating in platform work often believed their work draws on their qualifications and past experience at least to some extent (28.9% some, and 40.1% a lot).

Table 10 Use of previous skills and experience and opportunity for training (column %)

| To what degree does your platform work... | A lot | Some | A little | Not at all | Not applicable |
|---|---|---|---|---|---|
| Use your formal qualifications | 21.2 | 26.1 | 20.4 | 25.3 | 6.9 |
| Use your experience from past jobs | 31.6 | 28.8 | 20.5 | 14.1 | 5.0 |
| Use your skills and experience overall | 40.1 | 28.9 | 18.3 | 8.5 | 4.2 |
| Require you to do additional training | 7.3 | 20.2 | 29.1 | 35.8 | 7.7 |

## Locations of workers and clients on main platform

Most current platform workers (54.6%) worked from their home when undertaking digital platform work. However, 13.9% worked while travelling in their car or on their bike, reflecting the high levels of participation in transport and delivery driving (Table 11).

The location of 14.9% of workers was determined by the client.

Only 3.1% of current platform workers were working in a designated co-working space, while 8.0% were participating in digital platform work while at a workplace where they were an employee.

Table 11 Location of worker

| Location of worker | N | % |
|---|---|---|
| Home | 536 | 55.3 |
| At the workplace where I am an employee | 78 | 8.0 |
| In a co-working space shared with other workers | 30 | 3.1 |
| At another location chosen by me (e.g., café, library) | 41 | 4.2 |
| Travelling in my car or on my bike | 136 | 14.0 |
| In the home of an individual client I am doing the task for | 81 | 8.4 |
| On the premises of a business client I am doing the task for | 27 | 2.8 |
| At another location chosen by the client I am doing the task for | 37 | 3.8 |
| Other specified locations (e.g. hospital) | 2 | 0.2 |
| **Total** | **968** | **100.0** |

Current digital platform workers in Australia were largely providing labour to Australian clients; 65% of respondents indicated that their clients were based in Australia only, and a further 25.1% indicated their clients were from both Australia and overseas (Table 12). Of these, most Australian clients were based in New South Wales (34.4%), Victoria (24.5%) and Queensland (16.6%), as indicated in Table 13.

Only 32 current workers indicated that their clients were located in a country outside Australia. Identified countries included the United States (10), China (2), South Africa (1), Brazil (1) and Pakistan (1).

Table 12 Location of clients

| Location of clients | N | % |
|---|---|---|
| Australia only | 635 | 65.0 |
| Overseas only | 32 | 3.3 |
| Both Australia and overseas | 245 | 25.1 |
| I don't know | 65 | 6.6 |
| **Total** | **977** | **100.0** |

Table 13 State/Territory location of Australian clients

| State/Territory location of Australian clients | N | % |
|---|---|---|
| Queensland | 100 | 16.6 |
| New South Wales | 208 | 34.4 |
| Victoria | 148 | 24.5 |
| Tasmania | 8 | 1.3 |
| South Australia | 33 | 5.5 |
| Western Australia | 46 | 7.6 |
| Northern Territory | 4 | 0.7 |
| Australian Capital Territory | 8 | 1.3 |
| I don't know | 49 | 8.1 |
| **Total** | **604** | **100.0** |

Comparisons were made between the location of the worker and the location of clients to explore the extent to which platform workers were doing work for interstate clients.

For current platform workers in all States, the majority of their clients were located in the same State, with only a very small number (less than five in most cases) being located in other States.

## Satisfaction with work on main platform

Current platform workers were asked to indicate on a five-item scale (strongly agree, agree, neither agree nor disagree, disagree, strongly disagree) their satisfaction with various dimensions of platform work. The dimensions were clustered into three themes: access to work and income; career development; and working conditions (as set out in Table 14). Respondents could also answer 'I don't know' or 'not applicable' to this question. The percentage of 'I don't know' responses were low across all satisfaction questions (on the majority, less than 4%).

Table 14 shows the percentage of current platform workers who either strongly agreed/agreed, were neutral, disagreed/strongly disagreed or answered 'not applicable' on each satisfaction question. Means, which were calculated only on level of agreement on the five-point scale, without 'I don't know and 'not applicable' responses, are also presented.

Overall, current platform workers were moderately to fairly satisfied, as indicated by means over the neutral or mid-scale point '3' on all dimensions. It should be noted, however, that it is not unusual to find workers expressing high levels of job satisfaction even in jobs which are generally agreed to be of poor quality.[13]

They were most satisfied with the following dimensions of platform work (in descending order):

- the ability to choose the hours they worked (4.00)
- working for themselves and being their own boss (3.89)
- choosing their own tasks or projects (3.87)
- working at the pace they chose (3.76)
- enjoying the work they did (3.74).

[13] Morgan J., Dill, J. & Kalleberg, A. (2013), The quality of healthcare jobs: Can intrinsic rewards compensate for low extrinsic rewards? Work, Employment and Society, 27(5): 802–822.

Interestingly, these aspects of the conditions of platform work are all related to the flexibility of platform work.

Current platform workers were less satisfied with:

- earning a fair income (3.35)
- accessing work opportunities overseas (3.312)
- the fairness of fees and costs associated with work through the platform (3.37).

Note that more workers were still positive than negative about these aspects.

Table 14 Satisfaction with dimensions of platform work on main platform

| | Agree or strongly agree | Neither agree nor disagree | Yes | No | I don't know |
|---|---|---|---|---|---|
| **Access to work and income** | | | | | |
| The income I earn is fair | 47.3 | 24.7 | 20.4 | 4.9 | 3.35 |
| I have the ability to set the price for my services | 53.5 | 15.8 | 22.1 | 6.3 | 3.42 |
| The fees and costs associated with work through the platform are fair | 44.2 | 24.6 | 18.2 | 9.9 | 3.37 |
| I can find regular work through the platform | 48.0 | 24.8 | 19.6 | 5.1 | 3.38 |
| I can find work through the platform despite health issues or disability | 44.6 | 20.6 | 9.8 | 21.9 | 3.60 |
| The competition for work is reasonable | 49.4 | 25.3 | 16.1 | 5.4 | 3.42 |
| **Career development** | | | | | |
| I can attract more clients | 49.7 | 24.3 | 15.2 | 8.1 | 3.47 |
| I am gaining new skills or improving existing skills | 49.1 | 24.3 | 18.5 | 6.7 | 3.42 |
| I can access work opportunities overseas | 40.8 | 18.4 | 20.5 | 12.9 | 3.32 |
| The rating system on the platform is fair | 48.5 | 25.1 | 11.8 | 10.3 | 3.32 |
| **Working conditions** | | | | | |
| I enjoy the work that I do | 63.4 | 21.5 | 9.0 | 4.4 | 3.76 |
| I can choose my own tasks or projects | 67.9 | 16.4 | 8.5 | 5.5 | 3.87 |
| I can work the hours I choose | 72.4 | 14.3 | 7.3 | 4.5 | 4.00 |
| I can work at the pace I choose | 64.4 | 18.5 | 10.4 | 4.8 | 3.77 |
| I am free to decide how to perform any tasks or projects I accept | 62.0 | 18.1 | 12.5 | 5.1 | 3.72 |
| I can work from home or another place that I choose | 63.4 | 16.4 | 11.3 | 7.6 | 3.81 |
| I can work for myself and be my own boss | 68.5 | 16.0 | 8.4 | 5.2 | 3.89 |
| I receive adequate support to resolve disputes over payments or tasks | 40.7 | 27.5 | 11.9 | 11.4 | 3.43 |
| The health and safety conditions are adequate | 47.0 | 22.5 | 10.8 | 15.7 | 3.54 |

Further analysis looking at demographic categories showed no significant differences on any measures of satisfaction across disability, non-English speaking background, age, residency status or location, but did reveal differences in relation to gender. [14]

Gender differences in satisfaction were revealed on only two questions[15] – 'I have the ability to set the price for my services' and 'The fees and costs associated with work through the platform are fair'. In both cases, women's satisfaction was lower than men's satisfaction.

Satisfaction also varied by type of work performed. Comparisons were made between the three most frequent types of work (transport and food delivery services, professional services; odd jobs and maintenance work) and all other types of work collapsed into a single comparator. One-way analysis of variance revealed that compared to professional services work, those working in transport and food delivery services were significantly less satisfied with the ability to set the price for their services, finding work through the platform despite health issues or disability, gaining new skills or improving existing skills, accessing work opportunities overseas; and working from home or another place.

Satisfaction levels for transport and food delivery workers were also significantly lower than those doing odd jobs and maintenance in relation to the ability to set the price for services, gaining new skills, and deciding how to perform tasks or projects.

Finally, transport workers had lower satisfaction than workers in the collapsed 'other' category in finding work despite health issues or disability; gaining new skills, accessing work opportunities overseas, deciding how to perform task or projects, working from home; and health and safety conditions.

Respondents could also give free text responses in the survey, providing further insight into worker satisfaction as well as worker motivation. A summary of these free text responses is provided later in this report.

## Duration and frequency of platform work

Moving beyond the main digital platform, the survey asked current platform workers about their experiences offering services or performing work through digital platforms generally. Throughout this section, data are presented on current platform workers, and their broad experiences of performing work through digital platforms.

Most digital platform workers were fairly new to platform work. Over 60% began less than 2 years ago and almost half (46.5%) only started within the last 12 months (Table 15).

[14] To investigate differences by demographic categories, independent samples t-tests were undertaken on the categories of gender, disability and non-English speaking background, and a one way analysis or variance was used to compare means on measures of satisfaction by age, residency status, and location.

[15] 'I have the ability to set the price for my services' ($t=3.84$, $df=491$, $p<.001$) and 'The fees and costs associated with work through the platform are fair' ($t=2.13$, $df=491$, $p<.05$)

Table 15 Length of time since first started working or offering services

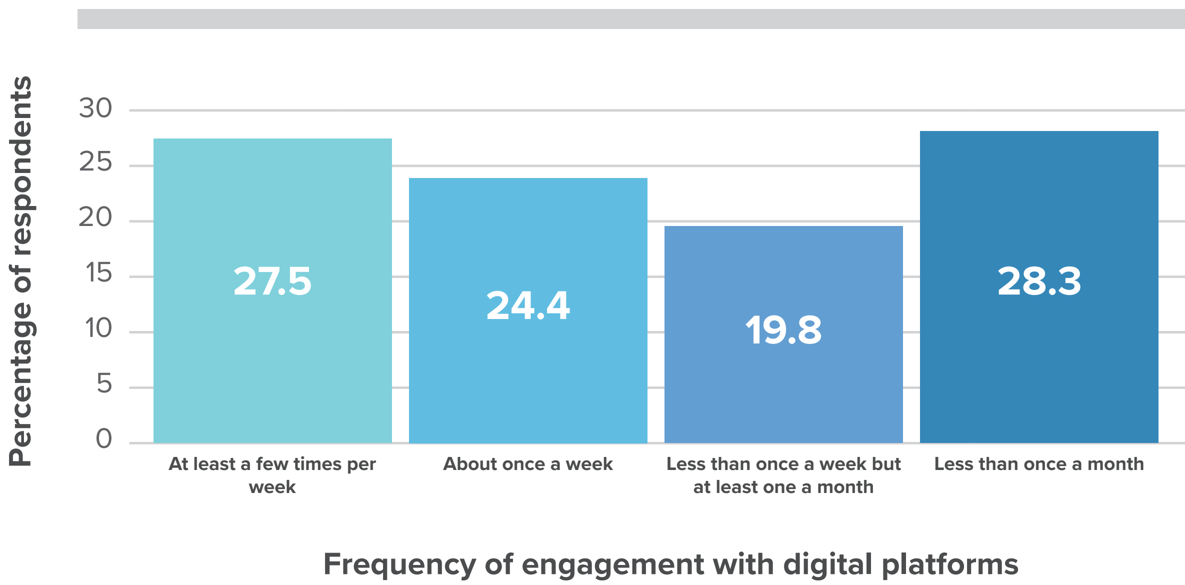
| Length of time since first started working or offering services | N | % |
|---|---|---|
| Less than 6 months ago | 214 | 21.7 |
| Between 6 and 12 months ago | 244 | 24.8 |
| More than 1 year ago | 220 | 22.4 |
| More than 2 years ago | 156 | 15.9 |
| More than 3 years ago | 79 | 8.0 |
| More than 5 years ago | 71 | 7.2 |
| **Total** | **984** | **100** |

Current platform workers were asked how frequently they engage with digital platforms to seek or undertake work.

Figure 3 shows that almost as many current workers participated frequently as those that who participated occasionally (less than once a month).

The frequency of current engagement with digital platforms was fairly evenly split across four categories.

Figure 3: Frequency of engagement with digital platforms




As shown in Table 16, women participated less frequently than men, and temporary residents participated more frequently than Australian citizens.[16]

[16] These patterns were confirmed through a chi-square analysis, which showed women participated less frequently than men Chi2 (3, n = 980) = 13.86, p < .05 and temporary Australian residents participated more frequently than Australian citizens Chi2 (9, n=982) = 16.84, p <.05.

Students and the unemployed participated more frequently (once a week or more), while retirees participated less frequently (less than once a week).

There were no significant differences, however, in the frequency of engagement across age, State/Territory, disability status, Aboriginal and/or Torres Strait Islander status, non-English speaking background, or education.

When viewed by type of work, those doing creative and multi-media work engaged less frequently. These workers were less likely to be participating 'at least a few times a week' and more likely to participate 'less than once a month'.

In contrast, transport and food delivery workers were much more likely to participate at least a 'few times per week' and less likely to participate 'less than once a month'.[17]

Table 16 Frequency of engagement with platforms by selected demographic categories

| | | Frequency of working through digital platforms % | | | | |
|---|---|---|---|---|---|---|
| | | At least a few times a week | About once a week | Less than once a week but at least once a month | Less than once a month | Total |
| Sex | Female | 20.6 | 24.7 | 21.9 | 32.8 | 100 |
| | Male | 31.1 | 24.4 | 18.4 | 26.1 | 100 |
| Residency status | Australian citizen | 26.9 | 22.4 | 20.5 | 30.1 | 100 |
| | Permanent resident | 24.6 | 31.3 | 17.9 | 26.1 | 100 |
| | Temporary resident | 33.7 | 32.5 | 18.1 | 15.7 | 100 |
| Labour force status | Employee or self-employed | 27.6 | 24.6 | 19.4 | 28.4 | 100 |
| | Unemployed | 35.4 | 25.0 | 18.8 | 20.8 | 100 |
| | Student | 34.2 | 24.1 | 22.8 | 19.0 | 100 |
| | Retired | 23.5 | 14.6 | 11.8 | 50.0 | 100 |
| | Full-time homemaker/unpaid carer | 7.4 | 29.6 | 25.9 | 37.0 | 100 |
| | Volunteer | 8.3 | 41.7 | 16.7 | 33.3 | 100 |
| | Other not in labour force | 20.0 | 6.7 | 40.0 | 33.3 | 100 |

## Hours per week spent working on digital platforms overall

Only a very small percentage of current platform workers were spending a large number of hours doing so. Almost half (47.2%) of current platform workers reported spending less than 5 hours per week working or offering services through digital platforms, whereas only 5.4% of current platform workers report 26+ hours per week (Table 17).

Consistent with other results, transport and food delivery workers were less likely than other types of workers to spend less than five hours per week and more likely to report working hours in the higher categories, including more than 35 hours per week. In contrast, odd jobs and maintenance workers were more likely to report working less than five hours per week.[18]

[17] Chi square analysis to examine any differences in the frequency of working through digital platforms compared to type of platform work was highly significant Chi2 (39, n = 981) = 112.19, p < .001

[18] These patterns were confirmed through Chi-square analysis Chi2 (65, n=989) = 92.21, p < .05

Table 17 Hours per week spent working on digital platforms overall

| Hours per week | N | % |
|---|---|---|
| Less than five hours per week | 465 | 47.2 |
| Between 5 and 9 hours per week | 259 | 26.3 |
| Between 10 and 15 hours per week | 130 | 13.2 |
| Between 16 and 25 hours per week | 78 | 7.9 |
| Between 26 and 35 hours per week | 28 | 2.8 |
| More than 35 hours per week | 26 | 2.6 |
| **Total** | **986** | **100.0** |

## Income derived through work on digital platforms overall

A substantial minority of respondents currently participating in digital platform work were reliant on the income (15.4%), considering it 'essential for meeting their basic needs'. A further quarter (24.5%) said it was an 'important part of overall income, but not essential', whereas a little more than half (52.3%) considered the income 'nice to have but can live without it' (Table 18).

Transport and food delivery drivers, in particular, were much more likely to say that their work generated 100% of their total annual income (Table 19).[19]

Four in five current platform workers (80.7%) reported that less than half of their total annual income came from platform work (Table 19). In contrast, one in six current platform workers (16.5%) reported that platform income constituted at least half but less than 100% of their total income.

Only a very small proportion of current platform workers derived 100% of their total annual income from platform work (2.7%) (Table 19).

Table 18 Reliance on income from working or offering services through digital platforms

| Reliance on income from working or offering services | N | % |
|---|---|---|
| Essential for meeting basic needs | 152 | 15.4 |
| Important part of overall income, but not essential | 242 | 24.5 |
| Nice to have, but can live without it | 516 | 52.3 |
| I do not earn any income from digital platform work | 76 | 7.7 |
| **Total** | 986 | 100.0 |

Table 19 Proportion of total annual income from platform work

| Proportion of total annual income | N | % |
|---|---|---|
| Less than half of total annual income | 795 | 80.7 |
| At least half but less than 100% of annual income | 163 | 16.5 |
| 100% of my total annual income | 27 | 2.7 |
| **Total** | 985 | 100.0 |

[19] Chi=square analysis showed a significant association between proportion of total annual income from platform work and type of platform work Chi2 (20, n=957), = 42.89, $p<.05$.

When analysed against demographic characteristics, as shown in Table 20, those with a disability were far more likely to say that digital platform work was essential for meeting basic needs and less likely to say 'it is nice to have but I can live without it'[20].

There were no significant differences in reliance on income by age, gender, State/Territory, non-English speaking background, or residency status.

Unemployed respondents were more likely to say the income from digital platform work was essential for meeting basic needs.[21]

Similarly, individuals with some primary school as their highest level of education were most likely to indicate that the income was essential and least likely to indicate that the income was 'nice to have but I can live without it'.[22] This result was reversed for those with a postgraduate qualification.

Type of platform work was also associated with reliance on income.[23] Transport and food delivery workers and carers were less likely to say the income was 'nice to have but not essential'. Transport and food delivery workers were more likely to say the income was essential for meeting basic needs.

Table 20 Reliance on income by selected demographic characteristics

| | | Reliance on income | | | | |
|---|---|---|---|---|---|---|
| | | Essential | Important | Nice to have | No income | Total |
| Disability | Yes | 29.0 | 30.4 | 29.0 | 11.6 | 100 |
| | No | 14.4 | 24.4 | 54.0 | 7.3 | 100 |
| Highest level of education | Less than Year 12 | 23.7 | 39.5 | 21.1 | 15.8 | 100 |
| | Year 12 or equivalent | 17.3 | 29.3 | 44.0 | 9.3 | 100 |
| | Vocational qualification | 20.3 | 25.5 | 47.4 | 6.8 | 100 |
| | Bachelor degree | 14.4 | 22.9 | 56.8 | 5.9 | 100 |
| | Postgraduate qualification | 10.2 | 22.4 | 57.7 | 9.8 | 100 |
| Labour force status | Employee or self-employed | 14.4 | 24.1 | 54.7 | 6.8 | 100 |
| | Unemployed | 31.3 | 18.8 | 41.7 | 8.3 | 100 |
| | Student | 16.5 | 35.4 | 43.0 | 5.1 | 100 |
| | Retired | 5.9 | 20.6 | 52.9 | 20.6 | 100 |
| | Full-time homemaker/ unpaid carer | 22.2 | 22.2 | 33.3 | 22.2 | 100 |
| | Volunteer | 33.3 | 33.3 | 33.3 | 0 | 100 |

[20] People with a disability were far more likely to say that digital platform work was essential for meeting basic needs and less likely to say 'it is nice to have but I can live without it' Chi2 (6, n=983), = 20.72, p<.05.

[21] In terms of labour force status, unemployed respondents were more likely to say the income was essential and less likely to indicate the income was just nice to have Chi2 (18, n=984), = 46.58, p<.001.

[22] Those with less than Year 12 as their highest level of education were more likely to feel the income was essential for meeting basic needs and less likely to say the income was nice to have but not essential Chi2 (12, n=985), = 34.35, p<.001.

[23] Chi2 (30, n=959), = 48.95, p<.05

Only half of all current platform workers were paying tax on the income they earned from digital platform work (Table 21).

Table 21 Payment of taxes in relation to income derived from digital platform work

| Payment of taxes | N | % |
|---|---|---|
| Yes | 500 | 50.7 |
| No, because not required to pay tax | 220 | 22.3 |
| No, because of other reasons | 144 | 14.6 |
| I prefer not to answer | 122 | 12.4 |
| **Total** | 986 | 100.0 |

## Motivations for undertaking platform work

As shown in Table 22, motivations for undertaking platform work were clustered into three themes: access to work and income; career development; and working conditions.

The strongest motivations for undertaking platform work, according to a four-item scale with anchor points 'Very important' and 'Not at all important', were (in descending order):

- 'earning extra money'
- 'working the hours I choose'
- 'doing work that I enjoy'
- 'choosing my own tasks or projects'
- 'working in a place that I choose'
- 'working for myself and being my own boss'

Less important motivations included 'finding work despite health issues or disability', and 'connecting socially with people'.

Table 22 Motivations for undertaking platform work (%)

| | Very important | Important | Slightly important | Not at all important | Mean |
|---|---|---|---|---|---|
| **Access to work and income** | | | | | |
| A financial necessity | 18.7 | 29.5 | 26.9 | 17.6 | 2.53 |
| Earning extra money | 34.3 | 39.3 | 17.8 | 4.4 | 3.08 |
| Finding regular work | 19.6 | 28.6 | 28.2 | 16.8 | 2.55 |
| Finding work despite health issues or disability | 14.8 | 22.2 | 18.7 | 19.7 | 2.43 |
| **Access to work and income** | | | | | |
| Building a portfolio | 16.9 | 31.3 | 24.2 | 17.4 | 2.53 |
| Attracting more clients | 21.3 | 31.7 | 23.4 | 14.9 | 2.65 |
| Gaining new knowledge or skills, or improving existing skills | 20.5 | 33.1 | 26.1 | 13.5 | 2.65 |
| Building networks | 19.5 | 28.4 | 25.3 | 18.5 | 2.53 |
| **Working conditions** | | | | | |
| Doing work that I enjoy | 31.2 | 36.8 | 20.4 | 7.4 | 2.96 |
| Choosing my own tasks or projects | 29.8 | 38.6 | 19.1 | 7.3 | 2.96 |
| Working the hours I choose | 36.2 | 35.4 | 17.2 | 6.9 | 3.05 |
| Working in a place that I choose | 29.1 | 37.3 | 21.2 | 7.6 | 2.92 |
| Working for myself and being my own boss | 29.3 | 34.4 | 21.2 | 9.5 | 2.88 |
| Connecting socially with people | 14.1 | 27.7 | 24.2 | 24.4 | 2.35 |

## Views on digital platforms

Respondents who were currently working on digital platforms and those who had worked on digital platforms more than 12 months ago were asked if they would like to tell us anything else about their experience with digital platform work.

Of the 401 valid free text responses from current and past platform workers, almost 40% of comments described respondents' satisfaction with or the perceived benefits of digital platform work.

Initial findings suggest that many of the cited benefits related to flexible work and being able to earn an income or additional income. For example, comments included:

> *"Digital platforms is [sic] an alternative for people who are unable to work outside their home and needed flexible hours".*
>
> *"Digital platform has helped a lot of people to do the things they want to.. It has also provided a lot of employment opportunities to people".*
>
> *"It's a good way to earn a little extra money on the side". "It's been awesome and flexible on my end".*

The remaining comments described negative experiences or views of platform work. Of those comments, 76 were non-specific statements that suggested frustration, stress or dissatisfaction with platform work, such as:

> *"It is equivalent to modern day slave labour".*
>
> *"it's a rip off".*
>
> *"I hated it".*

Other workers (current and past) listed more specific concerns regarding the working conditions associated with digital platform work. Insufficient reward for effort or low pay was the most commonly cited issue (45 mentions). For example, workers commented:

> *"I didn't enjoy it and found that the effort was not worth the amount I was paid."*
>
> *"I tried it but earnt less than $2."*
>
> *"Very low pay."*

Over 100 comments suggested dissatisfaction with the operations of digital platforms, including competition on the platform (24 mentions), fees and costs charged by platforms (22 mentions), platform rating and review systems (7 mentions), and various problems with how the platform operated and interacted with users. Further analysis of all free text responses is being undertaken.

# Past participation in digital platform work

This section discusses the responses of individuals who had previously participated in digital platform work more than 12 months ago (past participation). It considers the common digital platforms on which people have previously undertaken digital platform work, their reliance on that income and their patterns of working. This section also explores why people no longer participate digital platform work.

## Common platforms on which respondents worked more than 12 months ago

Comparison of platforms on which respondents worked more than 12 months ago and those on which respondents were currently working, shows similar patterns in the most commonly used platforms. Airtasker (21.6%), Uber (16.6%) and Freelancer (15%) were the most commonly used platforms by past participants.

The variety of different platforms identified by past participants was less than those nominated by current platform workers. This may reflect the emergence of new digital platform businesses in some sectors.

## Patterns of working through digital platforms more than 12 months ago

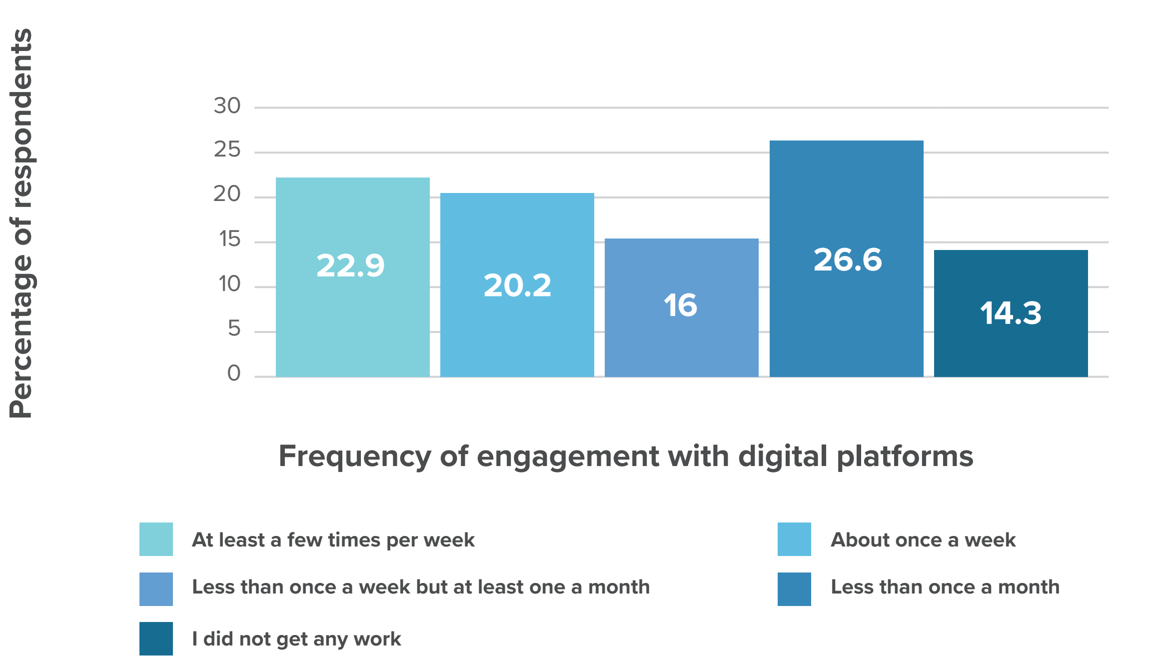
For those who had worked through digital platforms more than 12 months ago, a substantial proportion had first started doing this more than three years ago (18.5%), or more than 5 years ago (19.6) (see Table 23). This length of time was substantially longer than for respondents who were currently working through digital platforms, where two-thirds had first started working two years ago or less.

Table 23 Length of time since first starting work through digital platforms

| Length of time since first started working or offering services | N | % |
|---|---|---|
| More than 1 year ago | 282 | 33.9 |
| More than 2 years ago | 232 | 27.9 |
| More than 3 years ago | 154 | 18.5 |
| More than 4 years ago | 163 | 19.6 |
| **Total** | **831** | **100.0** |

Respondents who had worked through digital platforms more than 12 months ago were asked to indicate their frequency of engagement at that time. There were no major differences in this frequency of participation compared to those who were currently working through platforms (Figure 4).

Figure 4: Frequency of engagement with digital platforms (n=838 )




## Reliance on income from platform work more than 12 months ago

Around 40% of past participants indicated that their reliance on income from working through platforms was essential or important (see Table 24). This proportion was nearly identical to those currently working through platforms.

Table 24 Reliance on income from working or offering services through digital platforms more than 12 months ago

| Reliance on income from working or offering services | N | % |
|---|---|---|
| Essential for meeting basic needs | 170 | 20.4 |
| Important part of overall income, but not essential | 168 | 20.1 |
| Nice to have, but can live without it | 496 | 59.5 |
| **Total** | **834** | **100.0** |

## Reasons for discontinuing platform work

Past participants were asked to provide a free text response noting the main reason/s that they were no longer working or providing services through digital platforms. The responses were categorised and the results are shown in Table 25.

A lack of time was the most commonly cited reason for no longer working or providing services through digital platforms. Respondents in this category cited working through a platform as being too time consuming or that it took too long to complete tasks assigned and accepted through the platforms.

One in six past participants indicated that they had found full-time employment (or more suitable employment) and a further one in six indicated that the income earned through the platform was insufficient, either in absolute terms or relative to the time investment required.

Another one in ten past participants indicated that there was insufficient work available through the platform.

Together, the above reasons accounted for approximately two thirds of the responses provided.

Some past participants explained that they were no longer participating because of other priorities or a change in personal circumstances, such as commencing study, a new baby, relocating towns, travelling, or selling the resources required to participate (for example a car).

For some (2.8%) participation was always intended to be temporary.

In 12% of cases, respondents stopped participating for reasons directly related to the work: they either did not enjoy it (4.2%) or noted other concerns about the platform. Some of these concerns included:

> *"Too much competition"*
>
> *"It took 3 months to get paid"*
>
> *"Lack of ethics or acceptable IR [industrial relations] practices"*
>
> *"The process of managing a client ... was challenging"*
>
> *"They changed their operation and procedures which I didn't agree with."*

Table 25 Reasons for no longer working or providing services through digital platforms

| Reason | N | % |
|---|---|---|
| Insufficient time to participate, time-consuming or jobs take too long to complete | 208 | 23.8 |
| Found full time or other work or main job improved | 134 | 15.3 |
| Insufficient pay or return for time and effort | 134 | 15.3 |
| Insufficient work available | 79 | 9.0 |
| Personal priorities such as relocation or lack of resources | 66 | 7.6 |
| Concerns about trust and fairness on the platform | 61 | 7.0 |
| Did not enjoy the work | 33 | 3.8 |
| No longer needed, was temporary or a hobby | 22 | 2.5 |
| Health reasons | 21 | 2.4 |
| Retired | 19 | 2.2 |
| Incomplete response - could not be coded | 53 | 6.1 |
| Not sure, no reason | 43 | 4.9 |

Source: Respondents could provide multiple reasons across different categories = percent of cases total >100%

# Other ways of earning money in the digital economy

The survey results show that respondents were earning money through the digital economy in a variety of ways. The following section presents findings on the proportion of survey respondents who earned money using digital platforms. It includes both respondents who were working or offering services through a digital platform and also those who were selling, renting out or licensing goods or other property through digital platforms.

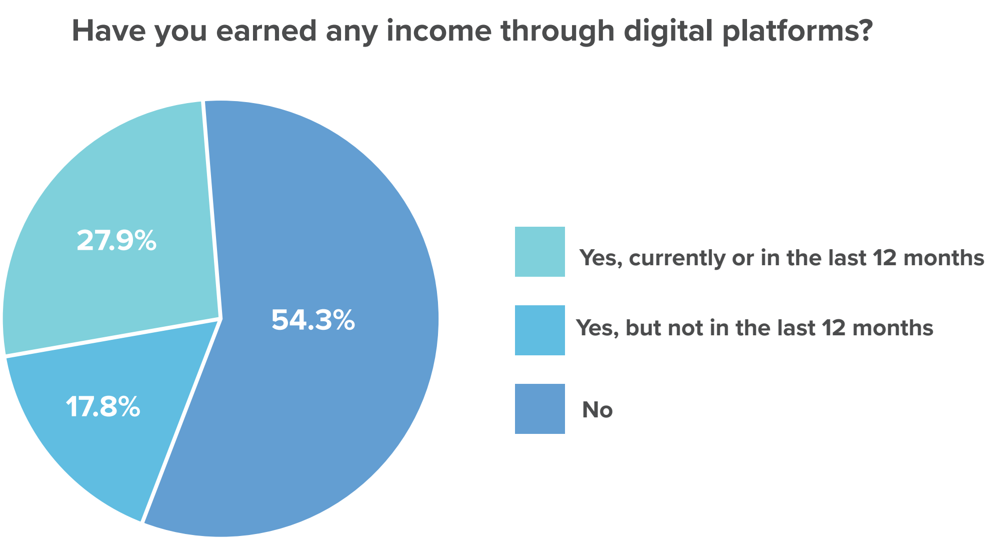
Prior sections of the report discussed income earned by working through digital platforms. This section focuses firstly on all survey respondents, and then on those respondents who earned money by selling, licensing or renting out through digital platforms.

## Earning money through the digital economy

As Figure 5 demonstrates, nearly half (45.7%) of those surveyed had earned money in some way through digital platforms, and more than a quarter (27.9%) had done so within the last 12 months. The figures for Victoria were 47.5% earning money in some way and 29.5% within the last 12 months.

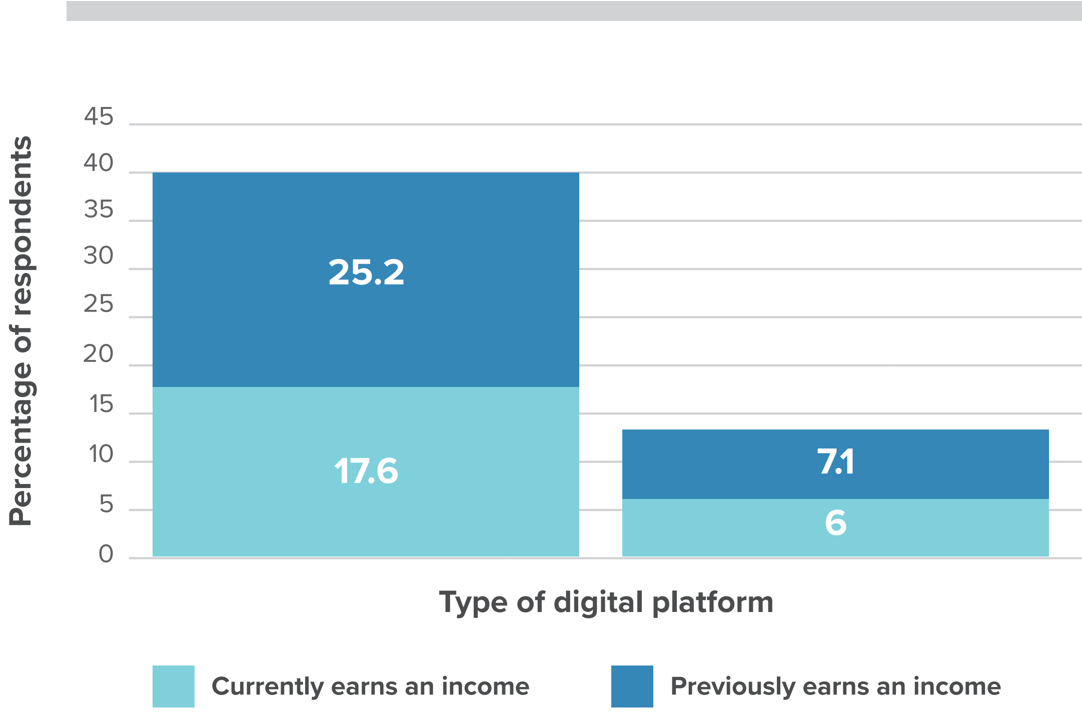
Most survey respondents indicated they had earned money either through digital platform work or by selling, licensing or renting out goods or other property. Only 3.5% of survey respondents were currently doing both: that is, earning money by selling, licensing or renting out AND, at the same time, working or offering services through digital platforms.

Figure 5: Proportion of respondents who earn any income through digital platforms (either selling, renting out or licensing goods or other property, or working)



More survey respondents earned money through selling, renting out or licensing goods or other property (42.8% overall, 25.2% in the last 12 months) than by working or offering services through digital platforms (13.1% overall, 7.1% in the last 12 months) (Figure 6).

Figure 6: Earning an income by digital platform type




## Prevalence of earning money by selling, renting out or licensing

Table 26 shows that nearly half of all survey respondents earned money selling, renting out or licensing goods or other property through digital platforms. Around one-quarter were doing so currently or had done so in the last 12 months.

Table 26 Current, previous or no engagement with selling, renting out or licensing goods or other property through digital platforms (n=14031)

| Earns money selling, renting out or licensing through digital platforms | N | % |
|---|---|---|
| Has never earned money selling, renting out or licensing through a platform | 8013 | 57.2 |
| Has previously earned money selling, renting out or licensing through a platform, but not in the last 12 months | 2472 | 17.6 |
| Currently or in the last 12 months has earned money selling, renting out or licensing through a platform | 3528 | 25.2 |
| **Total** | **14013** | **100.0** |

The most common approach to earning money through digital platforms from selling, renting out or licensing (Table 27), was selling or licensing products or one's own possessions through online marketplaces (37.7%), followed by renting out premises (9.1%) and, to a lesser extent, leasing out other property (4.7%) such as car parks, campervans, toys, tools or dresses.

Table 27 Type of activities in selling, renting out or licensing through digital platforms (n=13336)

| Earned money selling, renting out or licensing through digital platforms | No | | Important Nice to have | | No income Total | |
|---|---|---|---|---|---|---|
| | N | % | N | % | N | % |
| By selling products or your own possessions, or licensing creative works, through online marketplaces | 8628 | 61.6 | 2333 | 16.6 | 3052 | 21.8 |
| By renting out premises to someone else through digital platforms | 12607 | 90.6 | 684 | 4.9 | 722 | 5.2 |
| By leasing out your campervan, parking space, car (but not driving it) or other goods such as tools, toys or dresses, to someone else through digital platforms | 13336 | 95.2 | 345 | 2.5 | 303 | 2.2 |

## Most common platforms

Similar to patterns of digital platform work, many survey respondents sold, rented out or licensed through multiple platforms (Figure 7): 42.8% of those who had earned money in those ways used multiple platforms, while the majority used only one platform.

Figure 7: Number of platforms on which current users are registered to sell, rent out or license (n=3311)

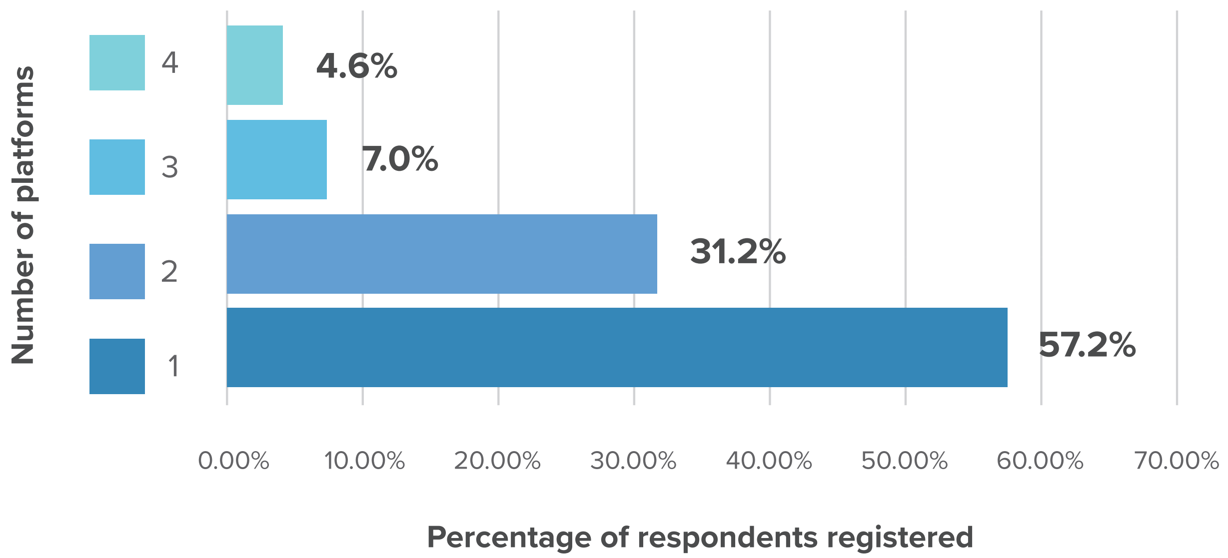


Table 28 ranks the most common platforms through which respondents earned money by selling, renting out or licensing. Respondents could select multiple platforms.

The online classified sites Gumtree, the e-commerce platform eBay and the online classifieds Facebook Marketplace were the most commonly selected platforms. It should be noted that Gumtree and Facebook Marketplace are not characteristic of digital platforms as defined in this survey, because in both cases the buyer pays the seller directly and not through the digital platform's payment systems. Both were, however, included in the survey because initial survey testing clearly indicated that participants perceived them as digital platforms. Similarly, Buy Swap Sell, Carsales.com and Realestate.com have been listed in the table because of the frequency with which respondents listed them in the category of 'other platform', but in each case the platform does not manage the financial transaction.

For true platforms, the accommodation rental platform Airbnb was the most common platform, selected by 15.7% of the respondents currently selling, renting out or licensing through digital platforms (or approximately 3.5% of the total sample).

The five next most common platforms were specialist e-commerce site Etsy, online accommodation rental site Stayz, and music licensing platform Spotify, car share platforms Car Next Door and Findacarpark, and digital image platforms Shutterstock and iStock.

No other platform was indicated by more than 1% of respondents earning money from selling, renting out or licensing at present or in the preceding 12 months. However, the range of platforms nominated was very broad.

Table 28 Platforms used by respondents to sell, rent out or license

| Platform | N | % |
|---|---|---|
| Gumtree | 1909 | 53.8% |
| eBay | 1856 | 52.3% |
| Facebook Marketplace | 1153 | 32.5% |
| Airbnb | 556 | 15.7% |
| Etsy | 179 | 5.0% |
| Stayz | 117 | 3.3% |
| Spotify | 91 | 1.4% |
| Car Next Door | 49 | 1.3% |
| Shutterstock | 47 | 1.2% |
| Findacarpark | 43 | 1.0% |
| iStock | 36 | 0.9% |
| Kindershare | 31 | 0.9% |
| Spacer | 31 | 0.8% |
| AnyHire | 27 | 0.6% |
| RentbyOwner | 22 | 0.5% |
| ShareWorkspace | 19 | 0.5% |
| Camptoo | 17 | 0.5% |
| RealEstate.com | 16 | 0.4% |
| The Volte | 15 | 0.4% |
| Behance | 14 | 0.4% |
| LiquidSpace | 14 | 0.4% |
| Campifiy | 13 | 0.3% |
| Buy, Swap and Sell | 12 | 0.3% |
| Dribbble | 11 | 0.3% |
| ToolMates | 11 | 0.3% |
| Flatmates | 11 | 0.3% |
| ShareMyOffice | 10 | 0.3% |
| Carousell | 10 | 0.3% |
| Carsales | 10 | 0.3% |
| DIVVY | 9 | 0.3% |
| Amazon | 9 | 0.3% |
| Redbubble | 9 | 0.3% |
| Fishpond | 7 | 0.2% |
| Envato Market | 6 | 0.2% |
| ShareDesk | 6 | 0.2% |
| Studiotime | 5 | 0.1% |
| Depop | 5 | 0.1% |
| Teachers Pay Teachers | 5 | 0.1% |
| Trade Me | 4 | 0.1% |
| Turo | 3 | 0.1% |
| All other selling platforms | 77 | 2.2% |
| Could not be coded | 140 | 3.9% |
| **Total** | **6615** | **186.5%** |

*Unweighted n=3547 Respondents could provide multiple reasons across different categories = percent of cases total >100%*

Respondents had been selling, renting or licensing products on digital platforms for longer than they had been working on digital platforms. When compared to the similar Table 15 on working, much higher proportions of respondents in this category (33.9%) had been selling, renting and licensing through digital platforms for more than 5 years (Table 29).

Table 29 Length of time since respondents first started selling, renting out or licensing

| Length of time since first selling, renting or licensing | N | % |
|---|---|---|
| Less than 6 months ago | 540 | 15.3 |
| Between 6 and 12 months ago | 510 | 14.5 |
| More than 1 year ago but less than 2 years | 417 | 11.8 |
| More than 2 years ago but less than 3 years | 378 | 10.7 |
| More than 3 years ago | 488 | 13.8 |
| More than 5 years ago | 1195 | 33.9 |
| **Total** | **14013** | **100.0** |

Respondents earning money through selling, renting out or licensing may have been doing so to supplement their income, with 74.4% saying that the money was “nice to have, but can live without it”.

A quarter, however, saw these platform earnings as an important or essential part of their incomes (Table 30).

Table 30 Reliance on earnings from selling, renting out or licensing

| Reliance on earnings from selling, renting out or licensing | N | % |
|---|---|---|
| Essential for meeting basic needs | 408 | 11.5 |
| Important part of overall income, but not essential | 496 | 14.1 |
| Nice to have, but can live without it | 2623 | 74.4 |
| **Total** | **3527** | **100.0** |

# Consumption through digital platforms

Five questions measured the prevalence of consumption through digital platforms – three which reflected different types of buying and renting goods or premises, and two which reflected different types of obtaining services (in-person at a specified location and internet-based).

As Table 31 shows, a majority of survey respondents had bought goods or accessed creative works through online marketplaces, most within the last 12 months (62.7%), with another 17.4% having done so more than 12 months ago. This could include buying goods through Etsy or eBay or by accessing music or photos through platforms such as Spotify or iStock.

A sizeable minority also rented premises from someone else, such as accommodation through Airbnb, or office space through platforms such as Sharedesk or LiquidSpace. About twice as many consumers were doing this currently or had done so within the last 12 months (29.9%), as compared to those who had rented premises but not within the last 12 months (14.8%).

To a much lesser extent, survey respondents have rented campervans, parking spaces, cars and other good such as tools, toys or dresses from someone else through digital platforms (5.7% in the last 12 months, 5.5% more than 12 months ago).

Of survey respondents who obtained services via platforms, this was mostly in relation to in-person work undertaken at a specified location. The majority of survey respondents who had obtained in-person services had done so recently or currently (41.6%), compared to a smaller proportion who indicated they did so previously but not within the last 12 months (7.1%). Such services included booking an Uber, getting food delivered by Deliveroo or Uber Eats, hiring a worker through Airtasker or a photographer through platforms such as Oneflare, or looking for a babysitter or support worker through platforms such as Care.com.

To a much lesser extent, survey respondents also obtained services through digital platforms where the work was internet-based or performed online. Around the same proportions of people had done this in the last 12 months (4.6%), as those who indicated they had previously obtained these services but not in the last 12 months (5.5%). This kind of work included getting a logo designed, content written, or software developed through platforms such as Freelancer or 99Designs.

The pattern of consumption in Victoria was broadly similar. In the last 12 months, 62.7% of survey respondents in Victoria had bought goods or accessed creative works through online marketplaces; 31.2% had rented premises; 5.0% had obtained services where the work was internet-based; and 43.2% had obtained services where the work was performed in person at a specific location.

Table 27 Type of activities in selling, renting out or licensing through digital platforms (n=13336)

| Earned money selling, renting out or licensing through digital platforms | No | | Important Nice to have | | No income Total | | Total |
|---|---|---|---|---|---|---|---|
| | N | % | N | % | N | % | % |
| By buying goods or accessing creative works through online marketplaces | 2792 | 19.9 | 2434 | 17.4 | 8781 | 62.7 | 100.0 |
| By renting premises from someone else through digital platforms | 7756 | 55.4 | 2067 | 14.8 | 4186 | 29.9 | 100.0 |
| By renting a campervan, parking space, car or other goods through digital platforms | 12435 | 88.8 | 771 | 5.5 | 799 | 5.7 | 100.0 |
| By obtaining services where the work was performed in person at a specified location | 7182 | 51.3 | 990 | 7.1 | 5833 | 41.6 | 100.0 |
| By obtaining services where the work was internet-based and delivered online | 12582 | 89.9 | 776 | 5.5 | 644 | 4.6 | 100.0 |

*Respondents could indicate yes to all five types of consumption.*

## Preparation of a final report

A final report on the survey results is being prepared for the Victorian On-Demand Workforce Inquiry. It will include a review of previous literature on platform work and the gig economy, and some additional analysis of the survey data.

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