

# Sceptics or supporters? Consumers' views of work in the gig economy

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*Labour-management practices and workers' experiences in the gig economy are topics of major interest for researchers, regulators and the general public. Platform companies project a vision of gig workers as autonomous freelancers, but pervasive features of their own labour practices, along with workers' traits, create new vulnerabilities and risks. Efforts to improve gig workers' conditions to date have made in-roads without achieving a general shift in platforms' practices or gig workers' conditions. In this paper, we explore how another, less-recognised stakeholder group—consumers—shapes the conditions of gig work. Drawing on Australian public opinion data, we study consumers' views of the gig economy and ask whether these will help or hinder pro-worker campaigns. While consumers are sympathetic to gig workers' financial plight, they also see benefits in the work's flexibility and opportunities for jobseekers. We explain how our findings can inform advocacy campaigns and further gig economy research.*

**Keywords:** consumers, ethical consumption, future of work, gig economy, labour standards, on-demand workforce, platform capitalism.

## Introduction

The proliferation of new and increasingly diverse digital labour platforms is one of the major economic developments of recent years. By enabling consumers to find and transact with many producers at lower cost, platforms have given rise to an 'on-demand' or 'gig' economy that is increasingly important in both physical (e.g. food delivery) and online (e.g. data entry) markets (De Stefano, 2016; Howcroft and Bergvall-Kåreborn, 2019; Kuhn and Galloway, 2019; Wood *et al.*, 2019). The leading platforms—Uber, Deliveroo, and many others—are global brands that are quickly becoming corporate titans (Conger and de la Merced, 2019). As labour market intermediaries, platforms account for 1–3 per cent of all paid work in advanced economies and this share is 'growing fast' (Schwellnus *et al.*, 2019: 8).

Various economic benefits have been ascribed to this burgeoning platform economy, mainly due to improved consumer choice and convenience (Minifie and Wiltshire,

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2016; Pasquale, 2016). Assessments of platforms' impact on working conditions, however, are often more critical. In contrast to a prevailing company rhetoric of choice and entrepreneurship (Roberts and Zietsma, 2018; Ravenelle, 2019), gig work is seen as insecure and exploitative by many labour and organisational scholars (Stanford, 2017; Van Doorn, 2017; Aroles *et al.*, 2019). Flexibility for workers is constrained, in practice, by performance surveillance and intense competition for the best-paid tasks (Scheiber, 2017; Lehdonvirta, 2018; Goods *et al.*, 2019).

Debates about how to protect and advance working conditions in the gig economy are fractious. Worker-led campaigns seek improvements via an array of new and old organising techniques, but platforms vigorously resist attempts to redefine their responsibilities as employers. Some platforms have modified their labour practices at the edges in the face of pressure from workers and/or regulators—such as by recommending (but not *requiring*) minimum wage compliance, or facilitating workers' access to private insurance—but these concessions are overshadowed by a larger 'reclassification risk' to platforms' business model (AlphaBeta, 2019). That is, the possibility that gig workers currently treated as contractors will be deemed by regulators to be *de facto* employees, with correspondingly greater entitlements (Cherry and Aloisi, 2017).

Legal determinations about this vexing classification issue, to date, are mixed; no universal or consistent precedent has emerged. The future of the gig economy thus remains unpredictable, with labour advocates and platforms often at odds over its benefits and drawbacks. Meanwhile, many governments are moving cautiously in deciding how, or if, to impose new regulations on platforms. There are marked cross-national differences, for instance, in how governments have responded to Uber's market entry (Thelen, 2018).

Along with workers and governments, consumers are another critical stakeholder group in the gig economy, although their influence has until recently attracted less academic interest. Thelen and colleagues have argued that platform companies seek to acquire a new form of power, by cultivating the loyalty and, occasionally, more active support, of consumers for whom platform services constitute 'part of the infrastructure of their lives' (Culpepper and Thelen, 2019: 8). If successfully nurtured, these bonds of consumer dependency give platforms significant leverage in political and regulatory processes, allowing them to portray critics as hostile to 'consumer choice' (Rahman and Thelen, 2019). However, because people have multiple identities that are cued by different issues—not only as consumers but also as citizens, taxpayers, co-workers and so on—public support for platforms is neither inevitable nor unconditional (Thelen, 2018).

To understand whether consumers will become, and remain, platforms' sceptics or supporters, we need more finely grained evidence about their views. We contribute to this endeavour, by exploring consumers' views about one of the most contested issues in platform capitalism: gig work. We argue that consumers' support for change or, conversely, their tolerance for the *status quo* is an important and understudied factor influencing how gig work develops. Prior research in different contexts suggests that, while consumers may support labour-rights campaigns for ethical reasons, they can also be mobilised against such actions, if these are seen to unfairly limit choice and convenience. The gig economy is arguably the most important arena in which these tensions over consumer choice, working conditions and business ethics are playing out.

In this paper, we present detailed empirical evidence about consumers' engagement with and views about work in a key section of the gig economy, drawing on a unique Australian public opinion data set. We focus on *locally delivered* gig work, as distinct from its remote and online varieties (Wood *et al.*, 2019). Our approach is exploratory, rather than hypothesis-driven, given the novelty of our study aims. We seek to answer one central research question: *Are consumers' views likely to help or hinder efforts to advance working conditions in the gig economy?*

As a foundation for our analysis, we draw from and link two disparate strands of research, which are canvassed in the next two sections: one on platforms' labour practices and gig work; the other on consumers and 'ethical consumption'. To situate our

study in broader international debates, we then sketch the particular Australian context in which platforms and gig work have emerged. Following a description of our data and methods, we provide empirical evidence of the relationships between consumer demographics, platform use and attitudes to gig work. We find that, while consumers are sympathetic to gig workers' financial plight, they also see some benefits emanating from this kind of work. We conclude by reflecting on the implications of our findings for consumer-focused advocacy campaigns and further gig economy research.

## Platforms' labour practices and their consequences

The notion of a 'gig' is freighted with descriptive and normative meaning. It implies not only that the work is one-off or short-lived, but that it should also be easy, incidental and, ideally, enjoyable. These conceptions affect how gig work is 'framed' in public debates and the types of assumptions that are made in deciding how, or if, it should be regulated (Pongratz, 2018).

Consistent with the insubstantiality that a 'gig' connotes, many current platform workers need to earn their main income from another, non-platform job. A large, company-sponsored study of Uber drivers in the United States in 2015 found that only one-third of drivers got their main income from Uber; most had another paid job (Hall and Krueger, 2018). In addition, but clearly related to holding multiple jobs, many gig workers appear to value the 'flexibility' of platform work. A recent Australian study, also sponsored by Uber and focusing on its drivers, found that 78 per cent of these workers had 'joined Uber for the flexibility [it provides] to balance their work, study and family commitments' (AlphaBeta, 2019: 3). Workers engaged by other leading platforms, such as Deliveroo, also see their work as having a high degree of temporal flexibility (Goods *et al.*, 2019). Armed with evidence of this kind, it is relatively easy to depict gig work as harmless and to imply that it should be of little concern to regulators (Healy *et al.*, 2017).

In contrast, other evidence points to negative effects of gig work, both for objective working conditions and for workers' subjective experiences. Gig work's defining feature is that it rarely entails employment. Instead of hiring employees, platforms register prospective workers as contractors without pre-committing to their hours or earnings. Work of this nature is inherently precarious, despite appearing to enhance worker choice. While gig workers do have some say over how much work to offer themselves for, this is a narrow and essentially negative freedom: to opt-out or withdraw. If they choose to participate, gig workers do not gain any corresponding positive freedoms: pay rates are mandated, tasks are automatically assigned by algorithms, data collection and ratings systems are pervasive, and workers are excluded from decision-making processes (Gandini, 2019; Veen *et al.*, 2019). In all these respects, gig work falls well short of the aspirational standards embodied in academic theories of 'job quality' (Goods *et al.*, 2019) and 'High Road' employment practices (Osterman, 2018; Healy and Pekarek, 2020).

The treatment of gig workers as contractors continues to face legal opposition. Critics see this practice as illegitimate and founded on an unsustainable legal loophole, which allows platforms to evade (for now) many obligations of employers, including minimum wages, paid leave and unfair dismissal laws (Eisenbrey and Mishel, 2016; Stewart and Stanford, 2017; Zwick, 2018). Reliance on contract labour is so fundamental to platforms' business model, however, that they strenuously defend it (Chai and Scully, 2019).

Initiatives to improve gig work conditions have so far been largely driven by workers. Their efforts have taken varying forms, consistent with evidence that they do not necessarily share a single work identity or the same level of commitment to collectivism (Newlands *et al.*, 2018). At a basic level, gig workers practise 'mutual aid' (Nissen and Jarley, 2005), by exchanging informal knowledge about work experiences and fostering communal bonds that may lead to further expressions of solidarity. Beyond this, nascent gig worker representative organisations, such as RideShare Drivers United,

entail more ambitious attempts to advance shared interests. The 'atomised' nature of gig work is not obviously conducive to collective resistance, yet many gig workers have shown resourcefulness and determination to forge alliances with their peers (Tassinari and Maccarrone, 2019). In some cases, they have also been assisted by traditional unions rallying to their cause, which reflects a widely held concern in the labour movement that platforms' business model will spread to other sectors (Weil, 2014; Minter, 2017; Stanford, 2017).

These interconnected approaches have succeeded in some ways, perhaps most emphatically by instilling greater public awareness of the gig economy and its consequences for workers. Often, however, progress has been short-lived or otherwise limited in application. 'Pro-worker' legal decisions are routinely appealed, and some have already been overturned, following extensive lobbying by the affected platforms. These efforts frequently go beyond reactive challenges to unfavourable rulings. In the United States, for instance, the National Employment Law Project has documented how the leading ride-hailing platforms seek to impose 'pre-emptive' pressure on lawmakers, to repeal or dilute labour regulations that are inimical to their business ambitions (Borkholder *et al.*, 2018). In many countries, including Australia, Uber has gone a step further, by appointing former lawmakers and regulators as its advisors, strategists or Board members. Platforms have thus deployed an array of tactics for influencing regulators and resisting tighter labour laws. In this context, persistent and increasingly well-organised challenges to platforms' labour practices have not yet led to radically different arrangements for protecting gig workers.

Platforms, workers and regulators are vital actors in the ongoing contest over how work in the gig economy is defined, organised and legitimised. Yet, there is another key stakeholder group whose influence has received much less academic attention: consumers. Their relative absence in these debates is puzzling, since so much of the platform business model hinges on generating supportive consumer sentiments (Thelen, 2018). By studying how consumer attitudes form and relate to usage behaviours in the gig economy, we build new knowledge about the determinants of gig work conditions and the prospects of improving these via consumer-focused campaigns.

### **'Ethical consumers' as a force for better working conditions**

While platforms are intermediaries between consumers and workers—enabling them to profit from both sides of every transaction—the latter relationship has been the predominant focus of gig economy research. This emphasis belies consumers' critical importance for platforms, not only as a revenue source, but also as *de facto* 'auditors' assigning ratings to each interaction, as potential allies in public debates and, ultimately, as the source of derived demand for gig workers (Rosenblat and Stark, 2016; Van Doorn, 2017). The centrality of consumers raises the prospect that their expectations and choices could encourage platforms to improve their labour practices. The corollary, however, is that consumers might also deter such progress, if they have different motivations. We seek to understand, through an exploratory study, which of these opposite possibilities takes precedence in the gig economy.

The consumer as actor has received limited attention in industrial relations (Kessler and Bach, 2011). However, the potential to 'leverage' consumers in pursuit of better working conditions is amply illustrated by recent studies of 'consumption relations', which show that consumers do influence labour standards in global supply chains (Donaghey *et al.*, 2014; Wright, 2016). These studies find that consumers factor in ethical considerations when purchasing, and so can be mobilised, either to actively withhold their support from unfavourable products ('boycotts') or to actively direct it to preferable alternatives ('buycotts') (Kimeldorf *et al.*, 2006; Stolle and Micheletti, 2013).

These points are echoed in the marketing literature on 'ethical consumption', which shows that consumer behaviours are informed by multiple ethical considerations, including the perceived impacts of their consumption choices on the environment,

treatment of animals and workers (Newholm and Shaw, 2007). A key finding is that consumers will pay higher prices for goods that are produced ethically, in certain circumstances, especially when this is believed to deliver meaningful benefits to workers (Tully and Winer, 2014; Hainmueller *et al.*, 2015). Put simply, ethical labour practices appear to command a premium price from consumers in some markets. We do not present definitive evidence in this paper of whether such an ethical labour 'premium' also applies to work in the gig economy, but, by raising the prominence of consumers in debates about platforms' labour practices, we hope to encourage further empirical research of that kind.

Which consumers are most likely to make ethical, or political, choices? A major cross-national study found that they are significantly more likely to be women, aged 30–44, employed, urban residents, with post-school education, and politically progressive (Stolle and Micheletti, 2013). By and large, this group is a well-informed, politically engaged middle class. These findings are instructive for our analysis; we look for evidence of whether these same consumer attributes are associated with distinctive patterns of platform use or with particular views about gig work.

While there is no prior research that specifically examines whether consumers' support can be marshalled to help improve gig work conditions, several prevailing features of the gig economy suggest that such efforts could be viable and worthwhile.

First, platforms are highly responsive to consumer demands. In the more established parts of the gig economy, consumers can switch platforms at low cost. Seemingly minor differences in platforms' practices could thereby sway the choices of consumers who are ethically minded. In the United States, Uber provoked widespread public enmity after it apparently attempted to undermine taxi drivers on strike at a New York airport; #DeleteUber was soon trending on social media and imploring Uber users to switch platforms (Cresci, 2017). In Australia, several newer ride-hailing platforms are seeking to differentiate themselves from Uber, by advertising pay rates for drivers that are 'fairer' (in the case of Ola) or 'the highest in the market' (Muve).

Second, gig work is labour-intensive. Given that consumers' ethical sympathies appear to be most strongly stirred by how *people* are treated, the labour of gig workers should elicit them. Further, because the varieties of gig work we study here are done locally and in-person, there is a direct 'line of sight' between consumers and workers. This 'labour process transparency' matters: customers are more appreciative of workers whose efforts they see (Buell *et al.*, 2017). The visibility of locally delivered gig work might thus be expected to evoke greater sympathy from consumers, which could incline them to support workers' claims for improved conditions.

Elsewhere, unions and labour-rights campaigners are already seeking to use the lever of ethical consumption to build support for better working conditions. The most common model involves non-governmental certification authorities that establish ethical criteria and conduct audits; the Fairtrade Foundation and Rainforest Alliance are well-known examples (Bartley, 2007). In the spirit of these initiatives, the 'Fairwork certification scheme' brings a similar approach to gig work (Graham and Woodcock, 2018).

An important countervailing consideration is that consumer sentiments can also be mobilised to oppose attempts to raise working conditions. When Uber's licence to operate in London was revoked by the city's transport authority in 2017, for instance, the company started a petition and urged customers to sign it, to preserve 'consumer choice'. Within a day, Uber had amassed more than half a million signatures in support (Dave and Schomberg, 2017). This incident shows that the leading platforms are willing to exploit their customer databases for political purposes. In doing so, they wield a significant strategic and informational advantage that is difficult for gig work reformers to neutralise. The ultimate success of this 'counter-mobilising' tactic from platforms depends on what fraction of the population are supportive users; this is one of the issues we explore with our data.

The foregoing review has shown that the contest for consumers' 'hearts and minds' is far from settled in the gig economy. Consumers' views and behaviours will both affect, and be affected by, broader contextual developments and the tenor of prevailing



public debates. In this dynamic environment, much can be learned from periodically 'taking stock' of how consumers perceive the gig economy and its impacts on workers. Our paper makes an essential, early contribution to understanding these issues. Before turning to our analysis and results, we briefly discuss key features of the Australian context in which platforms and gig work have emerged.

## The gig economy in Australia

As a technologically advanced, liberal-market economy with extensive international trading links, the responses of regulators and commentators in Australia to the rapid emergence of gig economy platforms will be recognisable to many non-Australian observers. Similar concerns were raised in Australia's case to those triggered elsewhere by platforms' arrival: competition, working conditions, tax compliance and consumer safety (Healy *et al.*, 2017; Thelen, 2018). Yet, while there are certain similarities between Australia and other countries, in the regulatory and business environments that platforms encountered, there are also some distinctive local factors worth mentioning that might have shaped Australians' views of platforms and gig work.

Platform work in Australia can be usefully located in the context of longer-term labour market 'fragmentation' (Wright and Lansbury, 2016). Economic reforms in the 1980s, combined with steadily declining trade union density, have seen the Australian labour market re-regulated to allow more varied forms of non-standard employment to flourish (Watson *et al.*, 2003). The most striking legacy of this process is widespread 'casual' employment—a form of (notionally) short-term work without predictable hours or paid leave entitlements—which today covers one in four Australian employees. This and other related developments inspire divergent normative interpretations, with some celebrating 'flexibility' and others denouncing 'precarity' (Markey and McIvor, 2018). But both sides of this debate accept that the Australian workforce is now more diverse than before, in both its formal work arrangements and its composition, with many more employed women, migrants, students and older workers, in particular. In this mixed labour market, the arrival of platforms offering a new way to earn money may seem like 'just another option' to many Australians. Not coincidentally, this uncritical view of gig work is also what platforms promote, as exemplified by the popular 'side-hustle' trope.

Australia's unique institutional arrangements for setting wages and working conditions should also be noted, in describing the local context that platforms entered on arriving here. Although their contemporary role is much diminished, conciliation and arbitration tribunals responsible for fixing wages at the national level have had an outsized influence on Australian industrial relations and social values. One lasting impact of their major decisions on rights and principles, such as 'comparative wage justice' and equal pay, is that Australians have an ingrained sense of fairness and equitable treatment. Egalitarianism or, colloquially, 'a fair go', is often invoked as *the* quintessential Australian value, especially in relation to work and pay (McCallum, 2006). Yet, recent developments have tested Australians' adherence to this fairness ideal. As in other countries, Australia's labour market has been polarised, as employment opportunities shift to favour skilled workers and as real earnings stagnate (Coelli and Borland, 2016; Gilfillan, 2019). These intersecting realities of working life are likely to have influenced Australians' responses to platforms and gig work. Some will see opportunity, where others see strife; our paper offers better evidence about which attitudes prevail, among which people, and under what conditions.

Platforms' reception will also have been further affected by the Australian public's heightened attentiveness to working conditions and to questions of how fairness is maintained in an open, service-oriented, and knowledge-based labour market. Australian elections have recently been contested with a strong focus on labour market (de-)regulation and the major political parties' opposing views on worker protection (Wilson and Spies-Butcher, 2011). By the time of Uber's arrival in 2012, the Australian public was sensitised to labour standards and new risks to them. The sense of working conditions being threatened has recently been compounded by successive media stories about systemic worker

exploitation in the service industries; 'wage theft' is now a major public policy concern (Gahan *et al.*, 2018). Wider issues around job insecurity and the future of work also remain highly visible, due to multiple and ongoing government inquiries.

Having initially provoked concerns about competition law (Deloitte Access Economics, 2015), questions relating to platforms' labour practices quickly took centre-stage in Australian gig economy debates. Here, the ambiguous and unsettled legal status of gig workers—whether they are independent contractors or employees—and the practical ramifications of this distinction have dominated. A string of major court cases, against a backdrop of worker activism, has kept attention on gig workers' entitlements. In 2016, for example, the labour federation Unions New South Wales highlighted the lack of minimum wage protections for gig workers, due to their contractor status, in a widely publicised report on Airtasker (Kaine, 2017). Another platform, Foodora, closed its Australian business abruptly in 2018, during legal proceedings alleging that it misclassified employees as contractors—a claim later substantiated by the company's local administrator (Marin-Guzman, 2018). Both cases illustrate why, amidst wage stagnation and revelations of worker underpayment, platforms' labour practices have attracted growing media and regulatory scrutiny. Some Australians may already have doubts or negative impressions, based on these and other similar cases, about whether platforms 'play by the rules' and uphold or undermine norms of fairness in their interactions with gig workers.

## Methods

To reiterate our objectives, we ask: *Are consumers' views likely to help or hinder efforts to advance working conditions in the gig economy?* To answer this question, we ask two further subsidiary questions: (1) to what extent do labour platform users resemble the profile of 'ethical consumers' described in earlier studies; and (2) how do consumers' views about gig work vary depending on their personal characteristics, and with respect to different features of this work?

## Data source

Our data come from a large online survey of Australians, aged 18 years and over, conducted in July 2017. Essential Media, a prominent polling company, was commissioned to undertake the fieldwork. The respondents were drawn from an existing panel of survey research participants maintained by the polling company, with selection quotas imposed (for sex, age and location), to ensure a sample that is representative of the Australian population. Sampling weights correct for minor remaining differences between the final achieved sample and the population at large.

The questions on platform services and gig work that form the basis of our analysis were part of a wider survey on how Australians use the internet and exercise their 'digital citizenship'. Initial descriptive results from the survey project have been reported by Goggin *et al.* (2017). In this paper, we conduct more extensive analyses, using the subset of questions on platforms and gig work. There are 801 responses for the relevant questions on which our analysis rests.

Some of these questions were adapted from another recent survey by the Pew Research Centre in the United States (Smith, 2016). Our survey asks mostly the same questions about whether gig work offers flexibility and has career benefits for workers. We rephrased another question for clarity, to ask whether gig work 'leaves workers financially insecure', rather than whether it 'places too much of a financial burden on workers'.

A noteworthy difference in design is that our survey focuses on platform *consumers*, whereas Pew studied *workers'* perspectives on the gig economy. As we noted earlier, consumers' views have received little attention compared with the increasingly rich evidence about gig workers. Focusing on consumers can thus potentially yield valuable insights about how the gig economy operates and whether platforms' labour practices are likely to meet further pressure for change.

## Measures

The first of our two main outcome (dependent) variables captures consumers' use of labour platforms. Respondents reported their use, and awareness, of three types of platform services, listed below. Our questions referred specifically to the major platform companies that would generally be recognised by Australians as indicative of the types of services provided in their respective market segments.<sup>1</sup> We asked about the following three types of labour platforms:

1. Household-based tasks or errands, with reference to *Airtasker*.
2. Ride-sharing and driver services, with reference to *Uber*.
3. Food and beverage delivery, with reference to *Deliveroo*.

For each of these services, respondents were first asked whether they had used it and, if not, whether they had heard of it. From this information, we derived a binary measure of platform use (coded 1 if there had been any use, and 0 otherwise). Using this measure, we identify the population prevalence of use for each of these platform services, both individually and overall. 'Non-users' are those respondents that have not used *any* of the three platform types (Table 1).

Our second variable of interest is respondents' favourability towards 'gig work'.<sup>2</sup> We captured this using a set of attitudinal measures about different aspects of gig work. Note that this shifts our focus from consumers' use of platform services (outcome 1) to their views about gig work (outcome 2). We explore the predictors of use and attitudes, and how these relate to each other.

We sought respondents' views on five propositions about the nature of gig work, listed below. On a 6-point scale, we asked to what extent they agreed or disagreed (or neither) that gig-work jobs:

1. Are a good entry-level job for people who are entering the workforce.
2. Leave workers financially insecure.
3. Are great for people who want a flexible schedule.
4. Are the kind of jobs you can build a career out of.
5. Are a good option for older people who don't want to work full-time anymore.

We reverse-scored the second of these items, so that the statements consistently invoke positive sentiments (i.e. more favourable views) about gig work.

Prior to analysis, we recoded 'unsure' responses to neutral (3: 'neither agree or nor disagree'). Given their near-interchangeability, this adjustment simplifies our results. We also collapsed the two 'agree' and 'disagree' response options into single categories (i.e. 1 and 2: '(strongly) disagree'; 4 and 5: '(strongly) agree'). Descriptive statistics for the resulting attitude measures about gig work (now coded as: negative/neutral/positive) appear in Table 3.

Our empirical analyses control for a range of respondents' demographic attributes: sex; age (in 10-year categorical ranges); location (whether living in a major city or not); highest educational attainment (university degrees, vocational training and no post-school qualification); language (whether speaks English at home or not); and labour force status (full-time, part-time and not in paid work). We include these controls in all models of platform use and attitudes to gig work.

## Estimation approach

We estimate two sets of regression models, the first focused on predicting platform use and the second focused on predicting attitudes to gig work. We recognise that



consumers' platform use and their views of gig work may be co-determined in ways that are difficult to unravel with our cross-sectional data. We nonetheless explore this possibility, by including variables for use and attitudes on both sides of our regression models and comparing their importance in the results.

Thus, our models of platform use include consumers' attitudes among the set of predictors. For this purpose, we constructed an overall attitude measure, which categorises each respondent as either negative, neutral or positive in their general opinion of gig work, based on their median response to the five statements about gig work, described above (Table 3 shows the resulting proportions in each category). In our second set of models, we explore consumers' views about these five issues separately, with prior platform use as the main predictor. For this analysis, we collapsed the original responses to the five gig work questions into binary-outcome measures (coded: agree = 1; otherwise = 0), to test how the probability of agreement with each statement varies according to differences in respondents' prior platform use and other personal attributes.

Our regression models are estimated using the binary regression ('probit') method. This shows how the probability of a dichotomous outcome changes with respect to levels of its predictors and relevant controls. We report our regression coefficients as *average marginal effects*, which represent the expected change in the outcome probability, *ceteris paribus*, for a unit change in each predictor. Asterisks indicate effects that are statistically significant at the 5 per cent level.

In Table 2, the outcome of interest is whether respondents have used each platform type; the predictors are respondents' demographics and general opinion of gig work. The demographic results provide us with evidence of whether Australian platform users resemble the profile of 'ethical consumers' as previously described. In Table 4, the outcome of interest is favourability towards gig work; prior platform use is the key predictor and we again include demographics as controls. Both sets of results contribute to answering our research question: *Are consumers' views likely to help or hinder efforts to advance working conditions in the gig economy?*

## Results

We first present findings about consumers' use and awareness of platform-based services in Australia. Perhaps unexpectedly, given the attention that the gig economy receives in popular media accounts, we find that platform users are a minority of the population; they constituted 36 per cent of Australians in 2017 (Table 1). A much larger group has heard of, but never used, any of the main platforms, and a further sizeable minority has not heard of them.

Table 1. Use and awareness of labour platforms in Australia

Percentage	Have used it	Have not used, but know it	Have never heard of it
Household-based tasks or errands (e.g. Airtasker)	7	57	35
Ride-sharing and driver services (e.g. Uber)	26	65	9
Food and beverage delivery (e.g. Deliveroo)	19	51	30
Across these three types	36	64	
	'Users'	'Non-users'	

Note. (a) Sampling weights were used in the calculations. (b) Rows may not sum exactly to 100, due to rounding.

There are some differences in usage patterns, depending on the particular platform in question. Ride-sharing and driver services, such as Uber, are the best known and most extensively used. Next are food and beverage delivery platforms, followed by platforms focused on household-based tasks. These differences probably reflect Uber's early role in spearheading the diffusion of the platform business model in Australia and its continued pre-eminence in gig work debates (McDonald *et al.*, 2019).

Who uses platform services in Australia? With our data, we are able to compare platform users to non-users and consider how any differences are likely to affect their support for improving wages and working conditions in the gig economy.

In Table 2, we report results from four regression models of platform use. We first estimate the probability of using *any* platform. We then re-estimate this same model, separately, for each of the three major platform types captured in our survey. The model coefficients can be interpreted as percentage-point changes from the relevant base category. For instance, in the first column of results in Table 2, people aged 30–39 years are 13 percentage points less likely to be platform users than comparable people aged 18–29 years (the base, or reference, category for age).

Table 2. A profile of labour platform users

	Any platform	Household (e.g. Airtasker)	Driving (e.g. Uber)	Delivery (e.g. Deliveroo)
<i>General view of gig work (base: Neutral)</i>				
Negative	–0.07	0.01	–0.01	–0.04
Positive	0.12*	0.03	0.11*	0.11*
Female	–0.01	0.00	–0.03	–0.01
<i>Age (base: 18–29 years)</i>				
30–39 years	–0.13*	–0.02	–0.10*	–0.01
40–49 years	–0.27*	–0.05	–0.24*	–0.09
50–59 years	–0.32*	–0.08*	–0.26*	–0.13*
60–69 years	–0.37*	–0.04	–0.33*	–0.17*
70+ years	–0.37*	–0.05	–0.32*	–0.18*
Lives outside a major city	–0.11*	–0.05*	–0.08*	–0.06*
<i>Highest education (base: School)</i>				
University	0.13*	0.01	0.14*	0.05
Vocational training	0.01	–0.01	0.04	0.03
Does not speak English at home	0.03	0.04	0.07	0.02
<i>Labour force status (base: No work)</i>				
Full-time work	0.12*	0.07*	0.06	0.08*
Part-time work	0.06	–0.01	0.03	0.05
Pseudo $R^2$	0.18	0.12	0.19	0.12
N observations	801	801	801	801

Note. \* $p < 0.05$ .

Our first important result is about the link between consumers' propensity to use platforms and their general views of gig work. We find that people with generally positive views of gig work are more likely to be platform users than those with neutral views. In most of our models, this amounts to an 11–12 percentage point increase in the probability of platform use, all else equal. There is an exception for household-based task platforms, such as Airtasker: for these, we find no equivalent increase in the probability of use associated with a positive opinion of gig work. This may be because consumers' views are largely informed by their perceptions of work done via other, more widely used platforms, such as Uber and Deliveroo (see Table 1), which do not necessarily translate into increased demand for the services of household-based task platforms.

Another important finding from this part of our analysis is that the relationship between views of gig work and platform use is not strictly linear or symmetric. In Table 2, there is no evidence of a significantly *lower* probability of platform use for consumers with negative general views of gig work. The relationship, in other words, only works to the benefit of platform companies. Consumers with negative views of gig work are no less likely to use platforms than others (with the same characteristics) whose views are neutral. A possible explanation for this unidirectional effect is that platform use is irreversible in our analysis. We ask respondents whether they have *ever* used platforms; those who answer 'yes' remain as a users, irrespective of their subsequent patterns of platform engagement. Our survey did not seek to measure the *frequency* of platform use over time. In future research, it would be beneficial to capture this information, in order to test whether respondents with negative general views about gig work use platforms less often.

Among our demographic variables, age, location, education and labour force status are each strongly predictive of platform use. Younger people are consistently the most likely to be users, with lower probabilities for successively older age groups. City-dwellers are also consistently more likely to be users; this underlines the importance of population density to the viability of many in-person labour platforms. Third, platform use is more prevalent among highly educated people, although this difference is only significant for university graduates, and only in two of our four models. Finally, full-time workers have higher rates of platform use than non-workers. Overall, then, these attributes of Australian platform users—young, urban-based, educated and working full-time—overlap substantially with those of 'ethical consumers' as described in prior research. This is an encouraging initial indication that platform users may also be conscious of the ethical consequences of their consumption choices, when participating in the gig economy.

Our results so far indicate which groups of consumers have had contact with platform services, and thus who might be targeted by campaigns against platforms' labour practices. But, for any such initiatives to succeed, they will also have to engage with—and perhaps shift—consumers' views. We have already seen that more favourable general opinions of gig work are positively associated with platform use. Next, we explore in finer detail what Australians think about the pros and cons of gig work.

In general, views about gig work are decidedly mixed, depending on which aspect of this work people are evaluating (Table 3). Clear majorities of Australians agree that gig work is beneficial for workers who want flexible schedules (71 per cent) and also that it provides a good option for older workers who do not want to work full-time (68 per cent). They are less convinced that there are good entry-level jobs in the gig economy (50 per cent agree), and even less sure that it enables workers to build their career (30 per cent); many are ambivalent about both issues. Finally, very few Australians (13 per cent) believe that gig work promotes financial security. Those who *disagree* (42 per cent) outnumber those who agree by three to one, although, again, many people had uncommitted views on this.

To offer a more thematic interpretation of these results, we find that many Australians like and value the flexibility that the gig economy affords to workers. Notably, this is also the dimension of gig work that platform companies emphasise and promote (Zwick, 2018; AlphaBeta, 2019). There is scepticism about gig work as a pathway to

Table 3. Consumers' views about gig work

Gig work is...	% Negative	% Neutral	% Positive
Great if wanting a flexible schedule	4	25	71
A good option for older workers who don't want to work full-time	5	27	68
A good entry-level job	10	40	50
Enabling people to build a career	25	45	30
Leaving workers financially insecure (Reverse-scored for analysis)	42	46	13
General view of gig work (Median of the above items)	6	44	50

Note. (a) Sampling weights were used in the calculations. (b) Rows may not sum exactly to 100, due to rounding. (c) Rows are shown in descending order by the percentage with positive views.

career advancement; researchers, too, have noted the paucity of evidence about this issue (Healy *et al.*, 2017; Ashford *et al.*, 2018). Finally, many Australians appear to be concerned that gig work will leave workers financially insecure. This finding echoes the importance of questions around wage regulation and pay adequacy, not only in academic studies (Berg *et al.*, 2018) but also in major media stories about gig work that were circulating in Australia at the time of our survey. As we argued earlier, popular accounts of low pay for gig workers may have jarred with widely accepted Australian norms of fairness.

What do most Australians think, on balance, about the gig work that platforms have facilitated? We attempt to summarise consumers' prevailing sentiments in the final row of Table 3. To do this, we first derive the *median* response for each person, from their answers to our five separate questions about gig work. For example, a person who mostly disagreed with the five statements would have a median 'negative' view of gig work. Then, we calculated the proportions in each of the resulting categories over the whole sample; these are shown in the final row of Table 3.

Interestingly, we find that Australians are evenly split between those with and without positive views of gig work. Half of Australians thus have a generally favourable disposition towards gig work, and the other half do not. Those with largely 'neutral' views are easily the largest number of those who are not positive. We estimate that only 6 per cent of Australians have an avowedly negative view of gig work, notwithstanding substantial pockets of negativity in relation to some specific aspects of gig work, such as its implications for workers' careers and financial security (Table 3). For a large majority of Australians, then, *selective* doubts about aspects of gig work seem to be counterbalanced by greater favourability in other areas, such that their 'net' opinion tends neutral-to-positive across all five of the gig work propositions that we asked them about.

We have already shown (Table 2) that favourable views of gig work have a significant positive association with actual platform use. In the next analyses, we reverse this implied direction of causation, to explore whether prior platform use also has a predictive role in Australians' views about gig work. This recognises the possibility that consumers' attitudes to gig work may either lead to or follow from platform use, or both. Our aim here is to start the work that is needed to unravel this complex relationship, by offering empirically grounded, yet still preliminary and indicative, evidence about which direction of influence seems to dominate. The relationship between platform use and attitudes to gig work is also relevant in its own right, because of our interest in the potential for ethical consumption in the gig economy. Table 4 presents our main results from this part of the analysis.<sup>3</sup>

Our central finding is that platform users generally have more favourable views about gig work. In our first model specification, we compare the attitudes of platform

Table 4. The relationship between consumers' platform use and views about gig work

	Flexible schedule	Older workers	Good entry-level job	Build a career	Financial (in)secu- rity
<i>Model specification 1</i>					
Platform user	0.16*	0.16*	0.15*	0.14*	0.05
Pseudo R <sup>2</sup>	0.06	0.06	0.04	0.05	0.03
<i>Model specification 2</i>					
Type of platform user (base: Non-user)					
Household (e.g. Airtasker)	-0.11	0.01	0.10	0.22*	0.02
Driving (e.g. Uber)	0.13*	0.13*	0.10*	0.09*	0.01
Delivery (e.g. Deliveroo)	0.19*	0.19*	0.16*	0.07	0.04
Pseudo R <sup>2</sup>	0.08	0.07	0.05	0.06	0.02

Note. All models include controls for sex, age, location, education, language and labour force status.

\* $p < 0.05$ .

users and non-users (as in Table 1), while controlling for demographics. In all but one case, we find that platform users hold significantly more positive views of gig work than comparable non-users. The differences are consistently in the order of 15 percentage points; for example, the probability that platform users will agree that gig work offers flexible schedules is 16 percentage points higher than for non-users. The exception to this pattern is in attitudes about financial insecurity. In its case, we find no evidence of a significant difference between users and non-users. Thus, while users are much more likely than non-users to agree with statements about the flexibility of gig work and its career benefits, these groups are no different on the question of gig work's financial impacts.

In our second model specification, we distinguish between the three types of platforms, in order to tease out how their patterns of usage may correspond to differences in attitudes. Recall from Table 1 that ride-sharing and driver services, followed by food and beverage delivery services, were the two most widely used platform types in Australia. In the second panel of Table 4, we see that these two major types of platforms are strongly associated with users' more favourable views about the flexibility of gig work. In contrast, the view that gig workers can build a career is most likely to be endorsed by users of household-based task platforms, perhaps because these users are more likely to interact with trained and specialised gig workers, such as electricians. Finally, regardless of which platforms they have used, we find no evidence that users are any more likely to accept the notion that gig work affords financial security. Our results again imply that concerns about gig workers' financial insecurity cannot be assuaged through platform use.

## Discussion and conclusion

In this paper, we have sought to bring consumers into focus as critical stakeholders and actors in the gig economy. We established that consumers have received little attention in the many studies now focused on gig work, and we argued that better evidence about them is needed. Drawing on prior studies of 'ethical consumption' behaviours and the ways in which these are elicited, we explained that consumers engaging with digital labour platforms have significant potential power to influence the direction and speed of change in the conditions of gig work. We explored Australian



consumers' views on different aspects of gig work and asked whether these are likely to help or hinder efforts to attain better working conditions in the gig economy.

Australians have generally positive views about some important dimensions of work in the gig economy. Irrespective of whether or not they personally use labour platforms, most Australians see some good sides to gig work in its flexibility and the labour market opportunities it creates. Platform users are consistently more positive than non-users about these *non-financial* benefits of gig work. Our analysis does not reveal exactly how these sentiments form, but we see several possible mechanisms.

One is 'wilful ignorance', whereby consumers deliberately overlook negative information about a product or service they desire (Ehrich and Irwin, 2005). Platform companies are alert to this, and rarely feature workers prominently in their advertisements. Instead, they show users and the 'tasks' they want done, but the exchange is rendered much like a transaction on Netflix or Spotify, rather than as it really is: a digitally mediated labour process, in which workers are central (Van Doorn, 2017; Roberts and Zietsma, 2018). Such misrepresentations may serve to quell users' concerns about platforms' labour practices and help to rationalise continued use.

Another interpretation is that more positive attitudes are developed through exposure to, and familiarity with, gig work; for example, as Uber riders observe and interact with their drivers. On one level, our results seem to differ from what might have been expected, based on earlier studies, which found that customers are *more* empathetic when they have direct contact with workers (Buell *et al.*, 2017). In the light of this previous research, our evidence that platform users are generally more favourable about multiple aspects of gig work is an interesting puzzle. One explanation might be that, when interacting with consumers, gig workers are engaged in a form of 'emotional labour' that is necessary in order to maintain favourable ratings, and thus the right to continue working, on the platform (Rosenblat and Stark, 2016). This performative dimension of the work potentially introduces a layer of inauthenticity that obscures consumers' view of the full spectrum of workers' experiences and may confound an empathetic response. Subsequent research should broach this conundrum, by collecting data across a wider range of attitudes, including whether consumers believe that gig workers can freely express their 'voice' while doing work on platforms (Johnston and Land-Kazlauskas, 2018; Newlands *et al.*, 2018). It is also worth reiterating here that our study focuses only on the face-to-face, locally delivered portion of the gig economy. We might expect some of the effects that are evident in this context to be attenuated or absent entirely when users and workers interact only digitally and virtually, in impersonal or even anonymous transactions, as is the case in much of the wider gig economy.

Whichever of these mechanisms takes precedence, our results imply that we should not expect new platform users to acquire more *critical* views of gig work that might lead to emancipatory conditions for gig workers. Users tend to be more supportive of platforms and, hence, they may be unmoved by much criticism aimed at gig work and the corresponding arguments for change.

Another important contribution of our study has been to improve evidence about the prevailing direction of influence between use of labour platforms and attitudes to gig work. We speculated earlier in the paper that there might be a bi-directional relationship between these variables, and our results bear this out. In sum, we find that, after controlling for demographic differences, a favourable general opinion of gig work is positively related to the probability of platform use, *and* also that prior platform use is positively related to favourability about many aspects of gig work. Both effects are statistically significant in our models. However, the latter effect (use as a predictor of attitudes) is consistently the largest in magnitude. This suggests that the threshold separating platform users from non-users is a vital one for determining how the gig economy evolves in future. What we observe, thus far in its existence, is that users exhibit systematically more positive views about most (but not all) dimensions of gig workers' experiences. It is also plausible that *reinforcing effects* operate, such that initial use triggers more positive attitudes, which in turn increase the likelihood of further use. We are only in the early stages of the larger research agenda that will need

to be pursued if we are to thoroughly understand these dynamics in the gig economy. Fascinating questions are yet to be answered, about the temporal ordering (sequencing) of the causal relationships, and the timing and quantum of any reinforcing effects. Access to robust, longitudinal data would be a major fillip to progress in these research areas.

While positive views dominate with respect to some key aspects of gig work, many Australians nonetheless see it as deleterious to workers' financial security. This opens up the potential for trade-offs in how consumers ultimately evaluate gig work, with the possibility that concerns about financial insecurity attenuate their favourable views towards other aspects of this work. Further research should seek to determine the precise 'weighting' and preference ordering that consumers use when appraising these different features of gig work. Such evidence would help to shed light on when and why consumers decide to use certain platforms instead of their rivals.

Another priority for researchers who build on our findings should be to *quantify* the value that consumers are willing to place on the different dimensions of gig work that we have explored. This extends our previous point about trade-offs between perceived benefits and drawbacks. To what extent do consumers' concerns about harming workers' financial security affect their willingness to pay more for using certain labour platforms, and how much are their calculations influenced by more positive assessments about the 'flexibility' and other benefits of gig work? Quantifying these effects requires experimental research designs that differ markedly from the exploratory approach taken here, but which would nonetheless build naturally on our findings.

A related issue is whether consumers think that any financial insecurity arising from gig work is countered by the support that gig workers receive from their family or from the social welfare system. In Australia, evidence about the value of these other supports is often used to discredit the argument that minimum wages should be raised to help low-wage workers escape poverty (Leigh, 2007; Healy, 2011). There is currently little evidence about whether gig workers benefit from similar financial support or, more pertinently for this analysis, whether consumers *believe* that they do and then act according to that belief.

A major practical implication of our findings is that efforts to improve gig work should target its one widely perceived drawback: financial insecurity for workers. Concerns about this aspect of the work are shared equally by platform users and non-users; unlike the other non-financial benefits we explored, platform use is not associated with more positive consumer views of gig work's financial drawbacks. Thus, to extend our previous point: even if platform users do not regard gig work as disadvantageous on the whole, they still may be receptive to criticisms and campaigns anchored in specific concerns about workers' financial insecurity. An appreciation of this risk, particularly in the context of heightened public interest in issues of wage stagnation and wage theft, offers a promising basis for gig workers to garner ethical consumers' support.

While our analysis emphasises consumers' views, it is pertinent to recall that most Australians (around two-thirds at the time of our survey) are not using any of the major platform services. The political potential of this 'uncommitted majority' should not be neglected in efforts to challenge platforms' labour practices. Not only are these non-users (and potential 'buycotters') as attuned as users are to the financial risks facing gig workers, they are also significantly less impressed by the non-financial benefits of gig work. In further research, it would be instructive to study how population attitudes to gig work develop as the user group grows in size and as its composition changes. Because of its single cross-sectional design, our study did not capture these dynamics. Replicating our survey would help to monitor these trends. Even better would be longitudinal studies that follow the same individuals over time, allowing us to examine how and why consumers' attitudes may change as yesterday's non-users become tomorrow's users.

In much the same way that better evidence is called for on the process by which people become platform users, so too is there a need to study more systematically how positive opinions about gig work are acquired. We have seen that Australians'

attitudes towards this still relatively new form of work are not presumptively positive, nor necessarily 'set in stone'. According to our results, half of Australians today have a generally favourable opinion of gig work, and the other half do not. Longitudinal survey data would be of great benefit to future researchers here, too, in determining if and why these population proportions shift or remain largely stable over time. If people's perceptions are subject to change, then we also need to understand more explicitly what happens to platform use behaviours generally, and to stances towards the use of particular types of platforms, as people with formerly non-positive views become positive, and *vice versa*. Progress on understanding these issues—which are of major practical interest—is only likely to be made in tandem with concerted efforts to bring gig workers into the scope of authoritative, longitudinal population and labour force surveys.

The novelty of our paper is in its contribution to understanding the role of consumers in the gig economy, and the scope for ethical consumption of locally delivered platform labour services. Prior research has focused largely on either the legal and regulatory issues associated with gig workers' status or on gig workers' material and subjective experiences of their work, including autonomy, control and economic security (Kaine and Josserand, 2019). Consumers have taken a backseat in much of this analysis, leading to partial understanding and incomplete theorising about platform markets and the socio-economic dynamics of 'gig work relations' (Healy *et al.*, 2017). By bringing consumers to the fore, our study highlights them as critical actors in the gig economy and helps to answer earlier, more general calls for industrial relations researchers to pay attention to consumers (Heery, 1993; Kessler and Bach, 2011). As we have detailed above, various promising avenues for further research are revealed by the inclusion of consumers and the resulting, more holistic perspective on platforms and gig work.

Our findings are also relevant for other stakeholders that have campaigned to improve gig work conditions, notwithstanding our focus on consumers. For policymakers, there is considerable value in knowing who uses labour platforms, how patterns of use vary across markets, and how use relates to attitudes. Similarly, our evidence on how gig work is perceived, with the abiding concern for financial security, can help to sharpen worker and union organising efforts and public-relations initiatives. Finally, platform companies could learn from our results, by recognising the increasing visibility of their labour practices, and the desirability of proactively addressing public concerns. As the gig economy grows and matures, platforms will face further demands, not only to *comply* with current employment laws, but also to adopt sustainable labour practices that treat workers as integral, rather than incidental, to business goals.

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## Notes

1. We did not ask about use of some important emerging platforms. For instance, several platforms now target aged care and disability support workers (Flanagan, 2019). At the time of our survey in July 2017, however, the three platform types that we focused on covered most of Australia's gig economy (Minifie and Wiltshire, 2016: 33–36).

2. The following details were provided to respondents about gig work: 'In recent years, technology has allowed individual workers to perform one-off tasks for people who need those services... These workers typically do not follow a set schedule, and get paid as they pick up assignments, instead of receiving an hourly wage or salary'.

3. In order to focus on the effects of platform use, we do not show the full demographic results in Table 4. These are available from the authors on request.

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