

# Gendered practices on digital platforms: beauty workers and their customers in India

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Our aim is to help policymakers identify, understand and prioritise key challenges and opportunities now and in the next ten years in the areas of public innovation, digital trust and equitable growth.

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# Foreword

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Digital labour platforms have entrenched themselves in the world's labour markets. Indeed, this phenomenon has many names: the gig economy, the sharing economy, the on-demand economy, the collaborative economy, and so on.<sup>1,2</sup> However, despite this ever-growing terminology, challenges still remain when attempting to understand digital labour platforms in their entirety.

Firstly, it is difficult to know how many people find work through platforms, and data varies massively on the scale of the global workforce that engages in platform work. Secondly, digital labour platforms are not evenly distributed globally, having different economic impacts from country to country. Yes, the United States (US) has the most platforms that enjoy the highest levels of investment and revenue, but other countries such as Spain and India also stand out for their high volumes of platform workers.<sup>3,4</sup> Finally, the taxi and delivery sectors, two of the most visible platformised sectors, have dominated research and studies of platforms. This means little is known about other often highly feminised sectors like the care, domestic and beauty sectors.

This challenging global context led to a partnership between Spain's Digital Future Society (DFS) Think Tank and India's Center for Information Technology and Public Policy at the International Institute of Information Technology of Bangalore (IIITB) with the primary objective of contributing to the knowledge gap on women's experiences with labour platforms by drawing on empirically grounded research.<sup>5</sup> Having first come together as participants in the Future Open Council, the Digital Future Society Think Tank's advisory group, both organisations share an interest in the platform economy and how the emergence of online and on-location labour platforms have impacted both countries. The report that follows is the result of this international collaboration and also aims to add to the body of knowledge that exists on the experiences of both workers and users of digital platforms in highly feminised sectors. Furthermore, this study should be seen as a stepping stone towards future comparative research between different sectors and global regions, focusing on workers' experiences, but also on the diversity of existing business models and their impact on local economies and workers.

Spain, as the latest European Commission COLLEEM survey from 2018 shows, has the highest volume of people working through digital labour platforms of all surveyed countries.<sup>6</sup> Also, approximately 20% of Spain's gross domestic product (GDP), although this figure varies depending on the source, is linked to the informal economy.<sup>7</sup> A large part of this informal economy relates to labour practices that could, if the workers were formally employed, lead to about 1 million new official jobs.<sup>8</sup> When viewed together, these data indicators help to show why digital labour platforms have found Spain to be fertile territory for growth.

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<sup>1</sup> Srnicek 2017

<sup>2</sup> Digital Future Society 2019

<sup>3</sup> ILO 2019

<sup>4</sup> Pesole et al. 2018

<sup>5</sup> IIITB was established in 1999 to undertake frontier research, offer academic programmes and help grow the world's largest IT export industry in and around Bangalore. The Institute is also focused on entrepreneurship and innovation, uniquely exploring how technological advances, coupled with institutional changes, can address the needs of underserved communities. To this end, IIITB's Center for Information Technology and Public Policy (CITAPP) routinely engages with policy planners and public officials, political leaders and community representatives, technology vendors and civil society organisations..

<sup>6</sup> Pesole et al. 2018

<sup>7</sup> Jiménez Fernández and Martínez-Pardo del Valle 2013

<sup>8</sup> Estévez Torreblanca 2020

Nonetheless, public debate in Spain on labour platforms has focused on employment status. Other relevant issues, including the number of people working through online platforms or even the growing presence of these platforms in different areas of the economy such as the domestic and care sectors, have received little attention.

In India, the economy is highly dependent on the informal economy and this represents roughly half of India's GDP and 80-90% of the workforce.<sup>9</sup>

Since the mid-1980s, India has traditionally been a great outsourcing market for information and communication technology (ICT) services for many OECD countries. This has been driven, in part, by demand triggered by rapid technological change. The demand has been matched by India's large number of engineering graduates, available at relatively low wages, combined with favourable government policies, and a large diaspora, especially in the US.<sup>10</sup> While these factors led to India becoming the world's largest exporter of software services, recent years have also witnessed the increasing deployment of ICTs to meet the needs of the domestic market. Digital labour platforms are one manifestation of that deployment.

This report explores the experiences of beauty workers and customers of two platforms in India. India is home to a thriving beauty and wellness industry providing the right context to build on existing platform economy research with insight into the experiences of workers, and also customers using digital platforms in highly feminised sectors. Specifically, the report looks at two areas, the city of Bangalore and the National Capital Region (NCR), which are home to the country's largest volumes of gig workers. Interviews took place during the highs and lows of the pandemic year and the methodology was adapted to fit the ongoing pandemic-related restrictions to ensure the safety of the researchers and interviewed workers.

The report highlights the relationship the workers and customers have with the platforms, as well as workers' incomes and their day-to-day routines. It offers first-hand perspectives and stories, including the workers' backgrounds and why they decided to start working for digital labour platforms. Questions were also asked about the experience of working on the online platform, income and savings and the legitimacy that platform work offers workers. Interviews also explored workers' onboarding experiences, coordination with platform management, customer relations and the impact of Covid-19 lockdown and its aftermath, among other issues.

We hope that this body of work will contribute to the understanding of a working context that sits at the heart of many of the labour regulatory challenges we face today on a global scale. In many cases, these platforms will lead the digital transformation of the sectors they enter and force traditional players to change their business models and the way they operate, interact with clients, workers and the ecosystem. Digital labour platforms will challenge the status quo in Spain, India and elsewhere – be it for revolutionary business models or innovative yet opaque models of algorithmic management.

**Carina Lopes, Head of Digital Future Society Think Tank at Mobile World Capital Barcelona**

**Balaji Parthasarathy, Center for Information Technology and Public Policy,  
at the International Institute of Information Technology of Bangalore**

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<sup>9</sup> Harriss-White 2020

<sup>10</sup> Parthasarathy 2020

# Executive summary

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Digital labour platforms have become a global phenomenon. Accordingly, gaining insights into platform practices that often cross international borders is not easy. Challenges include building an understanding of platform business models at the global level, the number of platform workers, their average earnings and working conditions, and the algorithmic models used for the organisation and management of labour, among others. Furthermore, although there is a growing body of knowledge and literature on the platform economy, the literature on sectors with a predominantly female workforce remains limited. This includes the experiences of both female workers and platform users.

By looking at the experiences of workers and users of beauty and wellness platforms in India, this report, the product of an international collaboration between Spain's Digital Future Society and India's International Institute of Information Technology Bangalore (IIITB), aims to be a starting point for addressing some of the challenges outlined above. India, the country at the heart of this report, is estimated to have 8% of the world's platforms and provides about 20% of the digital platform global labour force.<sup>11</sup>

As in other parts of the world, the beauty and wellness industry in India is growing and seeing a rise in e-commerce and digital labour platforms that connect freelance beauty professionals with clients. India is home to one of the world's fastest growing markets and is also home to one of the largest digital labour platforms in the region, Urban Company, which offers beauty services as well as a variety of domestic services. In this context, this report poses the question: What are the experiences of workers and their customers using digital platforms in the beauty sector in India?

To answer the question, 45 beauty workers and 30 users of two platforms, Urban Company and Yes Madam, operating in the beauty and wellness sector in India were interviewed. These interviews took place in Bangalore and in the National Capital Region (Delhi, Gurugram, Noida and surrounding areas) between March and November 2020. The research explored workers' motivations for working through an app, and their experiences with the platform and their customers, and the impact the Covid-19 pandemic has had on their working practices and daily experiences.

Regarding customers, the research aimed to understand their motivations for switching from an offline salon to online home-based services booked through an app, as well as their experiences with the platform and workers, and the impact the Covid-19 pandemic has had on their user experience.

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<sup>11</sup> ILO 2019

# Introduction

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Over the last decade, digital labour platforms have boomed. Although there are no definite figures, some estimates show that between 1 and 3% of the global labour force engages in some sort of digital platform work.<sup>12</sup> This includes on-location platform work and online platform work. On-location platform work is where the client and worker are in the same place, while online platform work sees the worker completing jobs remotely over the internet, including freelance work, crowdsourced and microwork.

The literature on the platform economy continues to proliferate with new academic papers and books published every year. This is happening at a time when courts are judging for and against the classification of platform workers as independent contractors and governments are seeking ways to regulate platform business practices.<sup>13</sup> Examples include California's Assembly Bill No. 5, the European Commission's aim to publish a legislative proposal by the end of 2021 and India's recent inclusion of the concept of platform work and platform workers in its Code of Social Security 2020.<sup>14, 15, 16</sup>

Despite the platform economy permeating diverse sectors and economic realities across different parts of the world, there is still scant literature and ethnographic research available on the actual experiences of platform workers. Furthermore, much of the existing body of literature – and the international debate, both institutional and public – remains heavily focused on the global north, on specific sectors (namely delivery and transport) and on concrete issues revolving around the employment relationship between platform and worker. In addition, as some academics denounce, there is “a gendered bias in both scholarship and public attention about on-demand labour, as male-dominated Uber has become metonymic of this economic sector”.<sup>17</sup> Until recently, the study of the platform economy in sectors with overwhelmingly female workforces, such as care, domestic work and beauty work, and the gendered experience of platform work, has been largely neglected.<sup>18</sup>

India is home to one of the world's fastest growing beauty and wellness market, which employs approximately seven million people.<sup>19</sup> According to a report by KPMG for the National Skill Development Corporation, the industry is growing at a compound annual growth rate (CAGR) of 18.6% and over half of the workforce is female.<sup>20</sup> The beauty industry offers, usually through salons, both products (for skincare, haircare, makeup and personal hygiene) and

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<sup>12</sup> Schwellnus et al. 2019

<sup>13</sup> See Ignasi Beltran de Heredia's blog for an updated compilation of court decisions in Argentina, Australia, Belgium, Brazil, Chile, France, Germany, Italy, Nederland, Panama, Spain, Switzerland, United Kingdom, United States & Uruguay. Reference: Beltran de Heredia Ruiz 2021

<sup>14</sup> Government of California 2021

<sup>15</sup> European Commission 2021

<sup>16</sup> Ministry of Law and Justice, Government of India 2020

<sup>17</sup> Ticona and Mateescu 2018

<sup>18</sup> Recent work done in this field of research on beauty work in India includes: Noopur Raval's and Joyojeet Pal's paper: Making a “Pro”: “Professionalism” after platforms in Beauty work; Anwar, Pal and Hui's Watched, but moving: Platformization of beauty work and its gendered mechanisms of control; the Asia Foundation's report “The Future of Work for Women's workers”. Sources: Raval and Pal 2019; Anwar et al. 2018; Chaudhary 2020.

<sup>19</sup> Vernekar and Sinha 2020

<sup>20</sup> KPMG 2013

services. Some beauty salons specialise in one type of service such as hair salons, nail salons and skin treatment.<sup>21</sup> Many others position themselves in the market as “full service”, offering hairdressing, manicures and pedicures, skin treatment, waxing and tanning. Occasionally, these salons also offer body treatments such as massage and other spa treatments. In India, beauty salons are mostly small businesses that compete alongside larger companies that have a presence across the country. Some long established salons such as Geetanjali, VLCC and Looks have also begun providing home services.<sup>22</sup>

Recently, India has seen an increase in purchasing power and an exponential growth in internet connectivity, which, combined with the influence of social media, have resulted in a rise in online sales of cosmetics and other beauty products. In parallel, start-ups and companies offering on-demand beauty services at home through web platforms and mobile apps have also started to emerge. This is not the only sector to have experienced the growth of digital labour platforms. According to Accenture’s Readiness Index, India was projected to lead the platform economy by 2020 alongside China and the US.<sup>23</sup> According to the latest World Employment and Social Outlook report by the International Labour Organisation, India is the largest supplier of online platform workers with 20% of the global share.<sup>24</sup> This includes, for example, people working remotely through crowdwork platforms such as Amazon Mechanical Turk or writers, translators, or data entry specialists finding work through Upwork.

There are no official figures regarding the number of digital labour platforms or platform workers in India. However, “narratives play a powerful role in shaping regulation”.<sup>25</sup> Therefore, understanding the varied experiences of those finding work through apps and web platforms is crucial for evidence-based policymaking.

## About this report

This in-depth study aims to build on existing platform economy research by asking the following question:

- **What are the experiences of workers and customers using digital platforms in the beauty sector in India?**

Specifically, the research aimed to build an understanding of workers’ motivations for working through an app and their experiences with the platform and customers. The research also aimed to understand customers’ motivations for switching from a salon to home services booked through an app, and their experience with the platform and workers.

The fieldwork started in March 2020 and coincided with the nationwide Covid-19 pandemic lockdown. Therefore, the interviews also included questions related to the impact of the pandemic.

The first section of this report presents the analysis of the worker interviews. The second part of the report then offers analysis of the data that emerged from the customer interviews.

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<sup>21</sup> Reddy 2020

<sup>24</sup> Jha 2021

<sup>22</sup> Chaudhary 2020

<sup>25</sup> Prassl 2018

<sup>23</sup> Accenture 2016

## Audience

This report is primarily for those interested in the gendered experiences of platform work and in the experiences of both workers and users of digital labour platforms in highly feminised sectors. The report is also aimed at policymakers who are participating in future of work commissions and debates or working on labour regulations.

## Methodology

The fieldwork consisted of interviews with beauty workers affiliated to two platforms — Urban Company (UC) and Yes Madam (YM) — and customers using these platforms.<sup>26</sup> The interviews took place in Bangalore and the National Capital Region (NCR), home to the country's largest volumes of gig workers.<sup>27</sup> The NCR includes Delhi, Gurugram, Noida and surrounding areas.



Figure 1: Map of India with the National Capital Region (NCR) and Bangalore highlighted. Image source: Digital Future Society.

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<sup>26</sup> These two platforms were not necessarily the first experience with online beauty work for some of the workers. They had either previously worked for, or had started their online careers with other platforms, such as HouseJoy or the now defunct AtHomeDiva.

<sup>27</sup> Unfortunately, there is no reliable data on either region or sector-wise distribution of either revenues or workers. For rough estimates, see Rao 2019, and Salman and Vaishali 2019. To acknowledge the regional variations in the skills and supply of workers, and customer preferences, Bangalore in southern India and the NCR in the north were chosen.

Interviews began in March 2020 and lasted until November 2020. The field research was suspended between April and July 2020 due to the lockdown that was enforced in response to the Covid-19 pandemic.

A total of 45 workers were interviewed. Of these, 15 were in Bangalore and work for Urban Company. The other 30 were in the National Capital Region, with 24 of them working for Urban Company and 6 for Yes Madam. Most of the workers included in the field research began working on the platforms (Urban Company and Yes Madam) before 1 October 2019, although a few joined as recently as March 2020, just before the lockdown was announced.

In addition, 30 customers were interviewed, split equally between Bangalore and the NCR. The customers included in the field research had all ordered an online beauty service on or after 1 October 2019.

All customers interviewed were users of Urban Company. Although these customers experimented with other platforms such as Yes Madam, they returned to Urban Company believing the platform offers a superior service experience. Among the NCR customers, the research encountered one customer who had switched to Yes Madam since it offered services at a lower price than Urban Company.

All interviews with customers were conducted in English. Worker interviews were conducted in the language that they preferred. Interviews were in Hindi and Punjabi in the NCR and Hindi and English in Bangalore.

The interviews lasted between 30 and 90 minutes. Due to the restrictions in place because of the pandemic, 12 worker interviews in the NCR, and all the worker interviews in Bangalore, were conducted over the telephone. One customer interview in each city was conducted in person, the rest were conducted by phone. See annexes 2 and 3 for the worker and customer interview questionnaire. A female researcher carried out the interviews and all workers and customers interviewed were women. Interviewees were identified through personal contacts and snowballing techniques. Platforms were not used to facilitate researchers' access to workers to avoid the possibility of retaliation and to limit potentially biased responses. Workers were contacted independently by researchers. All interviewees were compensated for their time either monetarily or with a gift card.

The interviews with both workers and customers sought demographic information, including details about their age, education, income, languages known, and number of years in their city of residence. Workers were asked about their experiences and the trajectory of their careers in beauty work, their motivation for choosing to seek work through app-based platforms, the onboarding and training processes, their experiences as employees with the apps, professional routines, and interactions with customers. In addition, questions relating to the Covid-19 pandemic, their experience of it and the platform's response were also included.

The interviews with customers asked about their reasons for opting for beauty and grooming services through online platforms, how it differed from their offline beauty service experiences, their thoughts on online beauty workers, their interactions with workers, how they rated their services, and their experience of using the apps through which they ordered beauty services. Like in the case of the workers, questions related to the Covid-19 pandemic were also included.

The interviews were transcribed into English and analysed using the principles of open coding and constant comparative analysis to derive themes that speak to the experiences of beauty workers and customers of online beauty platforms.<sup>28, 29</sup>

### About Urban Company and Yes Madam

**Urban Company**, formerly known as Urban Clap, is based in Gurugram in the National Capital Region (NCR).<sup>30</sup> It was founded in November 2014 “to empower millions of service professionals across the world to deliver services at home like never seen before”.<sup>31</sup> The services include beauty services, massage therapy, appliance repair, carpentry, house cleaning, painting and plumbing among others. Beauty services is one of the fastest growing areas on the platform.<sup>32</sup> As of 15 January 2021, the platform’s webpage claimed that it has more than 30,000 service professionals (whom this report will refer to as workers) and 5 million customers, spread across 27 cities, including 4 overseas: Abu Dhabi, Dubai, Singapore and Sydney.

Before meeting customers, Urban Company workers must buy UC Credits, each of which is worth 10 Indian Rupees (INR). The number of credits that the platform deducts as its commission depends on the service the customer books on the app and how much it will cost. The commission ranges from 5 to 30% of the job price. In addition to earnings, Urban Company also provides all profiled workers with insurance coverage: 600,000 INR for death/disability, 70,000 INR for hospitalisation, 10,000 INR towards outpatient care. Furthermore, workers who belong to the platform’s Gold Programme also qualify for health insurance coverage up to 100,000 INR. Workers in the Gold Programme must meet an earnings threshold and maintain a minimum rating, with membership updated monthly. At any given time, between 10-25% of beauty workers on the platform will be a part of the Gold Programme.

Urban Company expects workers to arrive at jobs on time. A late arrival can lead to the deduction of up to 2 credits, while the penalty for a no-show is higher and can go up to 500 INR. However, during the lockdown the company did not enforce the late arrival penalty. Beauty workers may decline leads but face penalties for rejecting either ‘repeat’ or ‘exclusive’ leads. The penalty for declining such a job is typically the commission they would earn for the job and, a worker not delivering 80% of her exclusive job leads risks her profile on the app being blocked.

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<sup>28</sup> Glaser and Strauss 1967

<sup>29</sup> Strauss and Corbin 1990

<sup>30</sup> Unless otherwise mentioned, information on the platform is gathered from the website and interviews with workers.

<sup>31</sup> Urban Company, n.d.

<sup>32</sup> Salman 2020

**Yes Madam** was founded in 2016 in the NCR by brothers Mayank and Aditya Arya.<sup>33</sup> The decision to launch the platform followed a negative experience Aditya had while visiting a salon. An inexperienced beautician burnt his skin while giving him a facial and the salon still presented him with a large bill. The goal of Yes Madam was to “organise the beauty industry through affordable and transparent services” provided in the comfort of customers’ own homes.<sup>34</sup> The platform website claims that its prices are 40-50% lower than those offered by salons.

Yes Madam charges customers separately for the service and the products used during treatments. For services, the platform has a per minute pricing policy so that the customer only pays for the time needed to perform the service they’ve requested. A minute’s services can cost either 6 INR/min (regular beauty worker) or 8 INR/min (premium beauty worker). Premium service rates are also applicable during the peak times of 0700 and 0900 hours, and between 1900 and 2100 hours.

The company takes a flat 20% commission on all services regardless of the price of the service. As well as 80% of the service price, workers are also given a fixed transport allowance of 100 INR when they travel more than six kilometres to a customer’s home. Yes Madam does offer insurance although workers have to pay a premium. None of the workers interviewed had opted for the insurance plan. Once on the platform, workers are not permitted to either bypass the app or render additional services without first processing them through the app. Workers may face penalties if caught flouting this rule and may even be kicked off the platform. Workers do not have the freedom to reject a customer. When they do, they must explain their refusal to the platform.

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<sup>33</sup> Information on the platform is gathered from the Yes Madam website, interviews with workers, from Manan 2018 and from Chowdhary 2019.

<sup>34</sup> Manan 2018





# **The experience of beauty workers**

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## Beauty workers' profile

Worker experience in the beauty sector ranged from 2 to 21 years with most workers having between 6- and 15-years' experience. The youngest worker interviewed was 21 years old, with ages ranging up to 45. The average age of the workers interviewed was 32. Regarding education, 24 of the 45 workers interviewed had studied until the 10th grade, 10 had studied until the 12th grade, 10 had an undergraduate degree and 1 had postgraduate education too.

Of the 15 workers interviewed in Bangalore, 12 were from the northeastern region and had migrated to the city for work. The other three workers were from Mumbai, Punjab and Raipur. In the NCR, workers were either from the region or neighbouring states such as Uttar Pradesh and Haryana. In each city, the sample of interviewed workers reflects the workers' networks that helped spread the request for interviewees. Therefore, while northeastern women also form a visible part of the beauty sector workforce in Delhi, they did not appear in our snowballing referrals.

Regarding marital status, 64.4% of the workers interviewed were married, almost 14% were divorced or separated and 22.2% were unmarried.

Workers in Bangalore and the NCR conversed with customers in Hindi, or in basic English with non-Hindi speakers. In Bangalore, three workers also spoke in Kannada.

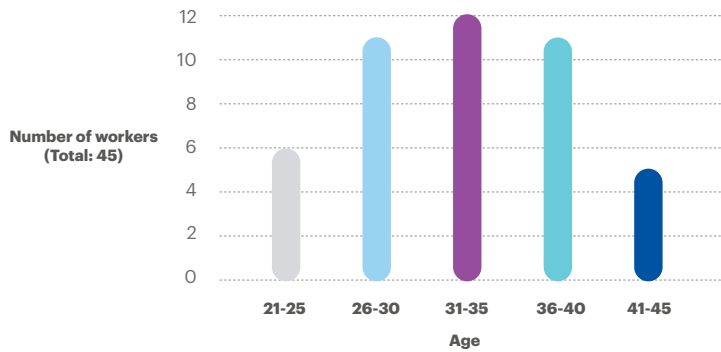
## Beauty work as a career

Rather than being the result of pursuing a deliberate professional aspiration, beauty workers typically entered the profession due to strained circumstances. For many, the drift to beauty work happened rather early in their lives after having discontinued their education, either because of illness or financial troubles in the family. For instance, when the Indian Prime Minister, Narendra Modi, announced the sudden demonetisation of the currency on 8 November 2016, it caused many women to experience financial uncertainty due to the reduced incomes or job losses faced by their husbands. Limited education, especially in comparison with their customers, is evident in their demographic profiles as presented in figure 2. Also, 13.4% of workers took to the profession because of marital problems or unstable family lives owing to domestic violence.

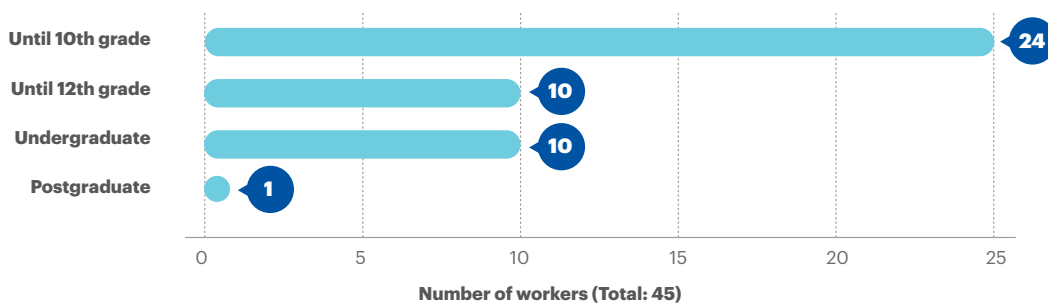
The skills required for beauty work appeared to be easy to acquire quickly while on the job, working in small neighbourhood parlours, offering an accessible route to financial stability and independence. Most workers learned their trade while working; for those who paid for training, the settings were often NGOs offering vocational courses for beginners. Some participants also paid for training as a way of upskilling their techniques and moving to better salons. Typically, this occurred as a mid-career transition with the worker seeking training in specialised and skilled work, such as hair and make-up, at recognised salon brands such as VLCC, Lakme, O2 Spa and Jawed Habib. Workers saved or took loans to pay for these

# Worker demographics

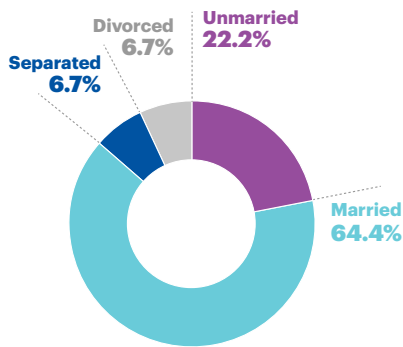
## + Age



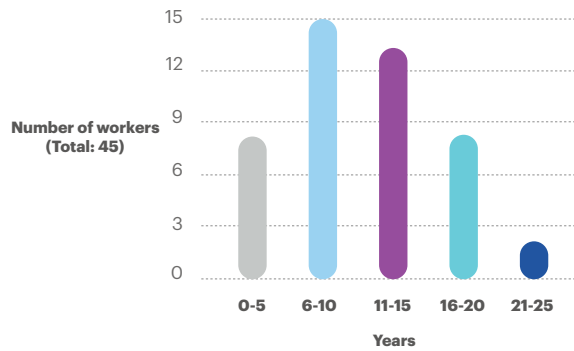
## + Education



## + Marital status



## + Years of experience in the industry



## + Time living in the city

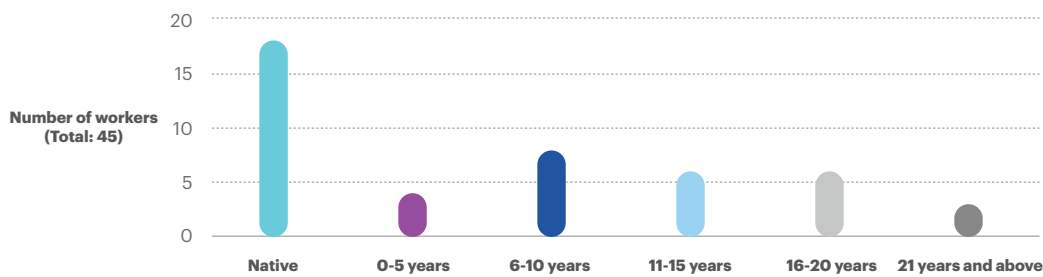


Figure 2: Interviewed beauty and wellness platform worker demographic information. Image and data source: Digital Future Society 2021.

courses. Since the workers had a wide range of experience, the cost of these courses has to be contextualised according to their respective time periods. One worker had paid 2,500 INR to an NGO in the late 1990s for a course, whereas another reported paying 150,000 INR for a 3-month course at Lakme Academy just before the pandemic hit.<sup>35</sup>

In Bangalore, 80% of the workers interviewed were from the northeastern region of India where skin care is particularly valued. Workers sensed growth prospects in the profession with rising disposable income triggering greater demand for beauty and grooming services.

## Switching to online platforms

Workers reported that it was rare to stay with a beauty salon for more than a couple of years. Opportunities to turn to online platforms for employment mainly came through personal networks. For some, these referrals came from their families and friends, or through friends of colleagues who were working with the online platforms. Also, platforms incentivise referrals, offering their workers between 1,000–3,000 INR for each new worker they can attract to the platform. Workers reported both referring others to join and being referred to the platform themselves.

Online platforms further reinforced themselves as serious options for employment through the various ways they became visible to workers. Workers reported seeing advertisements for companies such as Urban Company, as well as noticing those already working for the platforms because of the uniforms and kits (employer branding) they carried as they went about their work.

Workers mostly switched to online platform work to receive a higher salary and for improved work opportunities, or to escape hostile owners and colleagues. Workers expected to earn more than the typical monthly salaries of 20,000 INR offered by their offline jobs. Compensation on the platforms is commission based, with workers told the more they work, the more they could expect to earn. Urban Company promised high performing employees could see monthly earnings of 70,000 INR.<sup>36</sup>

In the case of Urban Company for instance, once the commission and other expenses (such as product costs or transportation to the client's home) are deducted, the platform claims that workers can expect to earn up to 30,000 INR a month, which is above the minimum wage for a 48-hour week. This claim comes from the assumption that the minimum price of a service ordered by a client is 600 INR and that a worker provides at least three services a day, six days a week (or, alternatively, does not take off for more than 50 work hours during a calendar month, with the work day running from 0900 to 1900 hours).

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<sup>35</sup> See annex 1 for a breakdown of all prices and values mentioned throughout the report.

<sup>36</sup> While meeting targets set by the platform is a concern for all workers, those affiliated with Urban Company said that they are not penalised if they fail to meet targets, despite threats to that effect. Since the lockdown, however, Urban Company no longer set targets for workers.

## Working conditions

### Income and savings

While workers reported an increase in online incomes, their ability to save varied according to their family situation. Participants with challenging domestic situations saved less than those with husbands working a steady job. Two workers illustrated how they were able to earn and save more while working online by pointing to their purchase of domestic appliances, such as refrigerators, TV sets and air conditioning units. Several Delhi workers reported saving money not through formal banking means, but informal means such as monthly 'kitties'. All interviewees in Bangalore were migrants and the majority of them had to send money back to their home or husbands.

#### Code on Social Security, 2020

In the year 2017-2018, 90.7% of the workforce in India was working in the unorganised sector.<sup>37</sup> Unorganised or informal workers are those who do not have a contract, "employment security, work security and social security".<sup>38</sup>

India's new Code on Social Security, 2020 is: "an act to amend and consolidate the laws relating to social security with the goal to extend social security to all employees and workers either in the organised or unorganised or any other sectors".<sup>39</sup> It aims to unify the provision of social security benefits to employees who previously fell under different legal instruments.

The new law includes the concept of gig workers, widely defined as someone who "performs work or participates in a work arrangement and earns from such activities outside of traditional employer-employee relationships". It also includes the concepts of platform worker and platform work. The Code defines the first as "a person engaged in or undertaking platform work" and the second as "a work arrangement outside of a traditional employer-employee relationship in which organisations or individuals use an online platform to access other organisations or individuals to solve specific problems or to provide specific services or any such other activities which may be notified by the Central Government, in exchange for payment".<sup>40</sup> According to the new law, platform workers need to register on an online portal to receive benefits under the Code.

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<sup>37</sup> Murthy 2019

<sup>38</sup> The National Commission of Enterprises in the Unorganised Sector (NCEUS, 2009:3) uses "informal" and unorganised interchangeably: "The unorganised sector consists of all unincorporated private enterprises owned by individuals or households engaged in the sale and production of goods and services operated on a proprietary or partnership basis and with less than ten total workers". Unorganised workers refers to "those working in the unorganised sector or households, excluding regular workers with social security benefits provided by the employers and the workers in the formal sector without any employment and social security benefits provided by the employers". Reference: National Commission for Enterprises in the Unorganised Sector (NCEUS) 2015.

<sup>39</sup> Ministry of Law and Justice 2020

<sup>40</sup> Ibid.

## The case of beauty workers

Both Urban Company and Yes Madam classify workers as independent contractors. If an offline beauty salon has 10 or less employees, it is not obliged to pay the workers' social security contributions. Unfortunately, the research discovered no data on the number of formal and informal beauty workers employed in the offline sector. It is likely that certain salon chains such as VLCC extend benefits to some of their employees. However, in the absence of data on the details of the kind of benefits these chains offer and to which type of employee, it is safe to assume that the vast majority of beauty workers (online and offline) work without benefits. At best, they receive incentives for meeting certain targets.

## Temporal flexibility

Along with increased earning potential, online platform workers also reported greater control over their time compared to offline salon work. Offline workers are expected to remain in the salon for the entire workday, which often stretches to 12 hours even when they do not have any clients (there are times when they are idle). One worker said she joined a platform because she noticed that people in her neighbourhood who worked for online platforms tended to return home earlier than she did. Her job at a salon would only release her after 2100 hours every night and she wanted more reasonable working hours for herself.

While workers typically worked for six to eight hours a day on platforms, they can choose the time slots. The Urban Company workday, for instance, is 0900-1900 hours. During this time period, the platform requires workers to mark their availability on a calendar that is divided into two-hour time slots. Workers did mention that they were discouraged from taking leave over weekends, unless there was an unavoidable urgency, as this was peak demand time. Beyond that, they reported flexibility in arranging their schedule which allowed them to make time for housework and family responsibilities such as childcare.

Workers particularly liked the ease with which they could take leave by blocking time off their calendars without having to deal with recalcitrant salon owners who would be unwilling to provide them with time off. A couple of workers reported that they could pace themselves better and rest between jobs by switching off the calendar on their phone, which they would not have been able to do in offline work. Similarly, another mentioned how she disconnected from work during her daughter's examinations to help her with her studies, which would not have been possible in offline salon work. One worker also added how she studied and freelanced as a makeup artist in between slots.

## Starting work on the platform

### Trial and selection

Workers mentioned that platforms did not ask for any kind of prior certification in beauty work. However, all workers reported undergoing and passing a test, for both Urban Company and Yes Madam. These tests required them to demonstrate their waxing, threading, and facial techniques, before they could be considered for work.

### Onboarding and training

Urban Company provides training that workers must undergo before they can offer services to customers. Beauty workers with prior work experience of at least a year enter the Urban Company-Finishing School, which includes a 10-day training period. A test on the eighth day determines whether the training period needs to be extended to 15 days. When training is extended, there is another test on the 13th day.

Those with no prior experience must attend a six-week programme called Urban Company-Academy. The platform also offers a one-day refresher training for those who return to the platform after a gap of more than five months. Additionally, existing workers who receive low ratings are required by the platform to attend refresher training programmes based on the reasons customers provide while rating the workers. Some interviewees reported that, after the lockdown, Urban Company began levying a training fee for new workers wanting to join the platform, amounting to 8,000–10,000 INR. They said that some of their friends, whom they had newly referred to the platform for work, chose not to join after learning of the newly instituted training cost.

Typically, a 10-day training programme includes daily trials and demonstrations that require workers to apply what they have learnt under the supervision of the platform's trainers. Instruction covers various issues ranging from company-owned products that workers will use while working, to different facial, threading and waxing techniques. It also includes upskilling techniques to meet the latest advancements in the field. During the pandemic, there was also retraining on aspects including contactless threading, and how to give facials using gloves.

Workers also reported learning about etiquette and customer relations during the training period. One remarked: "Communication with customers improves after the training. I learned things such as asking them if we should leave our shoes outside because then they tell us things like 'don't do that, dogs are around, they will take away your shoes.'" Another interviewee said that she learnt to ask customers if she should be mindful of things like ringing the bell when she arrives to avoid disturbing anybody else in the house such as sleeping babies. The training also includes how to use the mobile app, products, customer relations, grooming and hygiene. For instance, workers are taught that after-service trash is not to be disposed of in the house of a customer.

The training sessions also teach workers how to protect themselves. This is especially necessary as sometimes men pretending to be women will seek massage services. One

worker said that she relied on her own experience, as well as what she learnt in the training sessions, to assess the situation. She said:

**When in doubt, I will ask them ‘what is your skin tone?’ since these things are something which are known to ladies only. Gentlemen will not know anything about their skin or skin tone. I will ask them what product was used last time they had a facial and if they had any kind of reaction or something. Another question is what skin texture do you have? I will ask them to come online and talk to me immediately and if he gives the mobile phone to the madam then it is okay. Otherwise I will not go there. Usually whenever I go to the customer’s place... if a man opens the door, I will not enter the home. I will ask them to call the madam first.**

Finally, during the training period, platform trainers explain how to use the app and the platform’s terms and conditions for workers. Workers use the app in English even if they are not well versed in the language as the prompts are easily understandable to them. If the workers continue to face challenges using the app, they either rely on colleagues or a younger family member for help.

Urban Company encourages workers who successfully complete the training to apply for a Recognition of Prior Learning (RPL) certification, which could prove useful for career progression by encouraging micro-entrepreneurship possibilities.<sup>41</sup> The ability to do this became possible when the company signed a Memorandum of Understanding with the National Skill Development Corporation.<sup>42</sup>

In the case of Yes Madam, the platform provides a three-month training programme for workers without any prior experience in beauty work. Workers pay 20,000 INR for the programme. For those with prior experience, the training period averages 10 days. During training, workers are taught hygiene, communication skills, and groomed to interact with customers. To ensure the comfort and security of the customer and to maintain hygiene, workers always wear gloves and face masks. Once the service has been delivered, the workers also clean up and dispose of any waste in accordance with the customer’s instructions.

### Access to internet and mobile phones

An obvious prerequisite for using mobile phone apps is having access to smartphones. Recent years have seen a proliferation of both ownership and use of mobile phones with internet connectivity in India, especially in the cities. A country that had barely 1.1 telephones per 100 people in 1994 had 93.27 by 2018.<sup>43, 44</sup> By 2018, 98.12% of all telephone connections were mobile access, of which 34.7% had broadband internet connections.

The workers interviewed typically possessed smartphones with dual SIM cards they switched between for various reasons — including connectivity, price (at different times of the day), or to separate their work and personal lives. If their mobile internet connections were unreliable, some workers reported installing Wi-Fi in their homes specially to receive notifications for leads on their apps.

<sup>41</sup> For more on the RPL scheme launched by the Ministry of Skill Development and Entrepreneurship in 2015. See PMKVY, n.d.

<sup>42</sup> The Business Line 2019

<sup>43</sup> Bell et al. 1996

<sup>44</sup> DoT 2018



## Post-training

Once they've passed the training, workers must then provide their identity documents such as their Aadhaar and PAN cards, which are both commonly accepted forms of photo identification.<sup>45</sup> Urban Company also encourages them to offer five referrals who may also be interested in working on the platform. Some workers also reported police verification taking place in their homes. As described below, all workers must purchase products from the platform for use while working.

As a final step, before becoming available to customers through the Urban Company platform, workers must buy UC Credits. Each of these credits is worth 10 INR. The company then deducts these credits as commission for jobs, based on the charge applied to customers for the services they book with the worker on the app. The commission ranges from 5–30% of the job price. As mentioned earlier, Yes Madam takes a flat 20% commission and provides workers with a travel allowance, but not insurance.

## Purchasing products

When workers join Urban Company, they must invest 40,000 INR in a product kit which contains 84 products. The platform offers workers loans to cover this cost but charges an interest rate of between 18.5–23.2%, recovering the loan over a four-month period.<sup>46</sup> Beyond the initial purchase, workers must continue to buy all equipment and products from the platform. While this requirement increases the costs for workers, the platform justifies it as a means of ensuring a standardised service provision. Tracking the frequency and type of services provided by workers allows the platform to monitor projected product levels and estimate when they will need replacing.

Workers affiliated with Urban Company were told that as long as they used products purchased from the platform, they would be protected from any liabilities arising from customer complaints. Those who could not afford the cost of the kit in full opted for the loans offered by the platform. To provide the loans, the platform asks for electricity bills, rental agreements or voter ID as proof of address, as well as post-dated signed cheques.

Like Urban Company, Yes Madam requires its workers to purchase all products exclusively from the platform. Yes Madam workers must also maintain a minimum inventory worth 5,000 INR. However, the platform also offers customers the chance to lower service costs by using their own products, which means the platform only charges them for the service. When customers use Yes Madam products (which have 25% profit margins), they receive sealed single-use sachets. The use of such sachets reflects the platform's argument that the salon practice of using products out of large bottles, renders pricing opaque. Yes Madam workers only open the sachets in front of the customer to guard against any tampering or the use of fake products. Any partially used sachet is left with the customer.

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<sup>45</sup> The Aadhaar cards contain the biometrically verifiable 12-digit identification number issued to all Indian residents by the Unique Identification Authority of India. The PAN card is the Permanent Account Number for taxpayers in India, issued by the Indian Income Tax Department.

<sup>46</sup> Fairwork 2020

## Working through the app

### Receiving work

Urban Company uses an algorithm to identify workers who can meet the requirements of a requested service and are available at the customer's preferred time and location. Jobs, also referred to as leads, appear as prompts on the workers' apps. There are three kinds of leads, distinguished by how the app communicates and presents them: a normal lead reaches every worker, an exclusive lead prompts a specific worker, a repeat lead is when the customer has asked for the same worker again. The leads are also colour-coded: a normal lead is blue, while repeat and exclusive leads are green.

Workers reported that if they don't accept leads during times that they have marked themselves available, the platform calls to ask why. Some workers complained that their regular customers often found their slots busy when they tried booking with them even when they had marked themselves available on the calendar. At such times, workers asked customers to share screenshots with the platform's customer care department so that they could resolve the problem. Yes Madam customers can order services either by using the app, or by calling the platform's call centre, or through WhatsApp. When customers schedule an appointment in advance, workers can accept the work through the app. When customers require services immediately, the call centre calls available workers on and asks them to accept the appointment. In these instances, workers report that they have little room to refuse the appointment.

### Commuting to work

Workers reported that they were allotted work based on their location and expected to travel up to 10 kilometres. Urban Company workers also reported receiving exclusive leads that were in close proximity to where they were. Failure to accept these leads invited calls from the platform seeking an explanation. Workers' decisions to accept a lead were based on both the price of the job, as well as the distance they would have to travel to undertake it. For instance, a lead for a low-priced job, such as a plain waxing, that was far away would be rejected, but a lead for a high-priced job would be more likely to be accepted even if it was in a distant location. Workers also said that they checked Google Maps for commuting times to check traffic conditions before accepting a lead.

The mode of commute depends on the distance to be covered and the time available. In the NCR, commutes are mostly by moped with 53.3% of workers going by themselves, and 13.3% being dropped off by family members; 13.3% relied on auto-rickshaws, and a similar percentage on multi-modal transport (ie a combination of auto-rickshaw and bus, or auto-rickshaw and the metro, or auto-rickshaw and walking). Workers also reported using ride sharing platforms such as Uber/Ola auto and Rapido to commute to work. Buses were typically not a preferred mode owing to the heavy bags that workers have to carry.

#### + Mode of commute

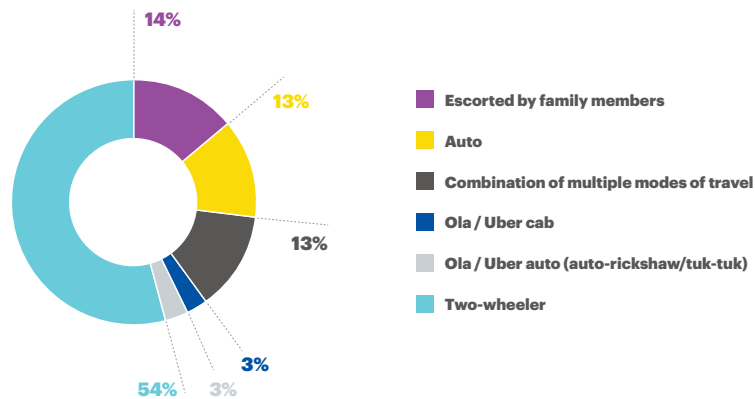


Figure 3: How beauty and wellness platform workers commute to jobs. Image and data source: Digital Future Society 2021.

## Submitting updates

Once workers accept a lead, they use the app to submit updates on their movements to enable the platform to track the progress of the job. Workers mark their arrival time at the customer's place, as well as the job's start and end time. Workers do not face penalties for spending too much time in a customer's home, but Urban Company will fine them 10 INR for late arrival. Therefore, arriving at the customer's home on time is a priority for the workers. As a consequence of the Covid-19 pandemic, workers must also upload photographs of themselves wearing masks, gloves and face shield as well as washing their hands and setting up their work area before starting a job.

## Worker preference for performing services

Workers reported calculating costs when choosing the kind of services to perform. One worker said that she frequently told customers that she was out of bleach because she could barely earn anything from bleach given the cost of the product. Similarly, workers found the frequent 'discounts' and 'sprees' Urban Company offered customers "exploitative" and "unfair". While these offers resulted in more work, the platform maintained the same commission and product pricing structure, meaning workers still had to cover the same costs while receiving reduced payments for their services.

When asked if they had preferences for performing certain kinds of beauty work over others, workers consistently reported an aversion to pedicure work. The reasons for this are twofold. One, the pedicure tub is bulky and heavy, and is cumbersome to carry around, and the work is physically taxing and requires a lot of strength. Two, pedicure work takes longer than the time the company assigns to the job on the app. Although customers were happier and gave better ratings if workers took their time with the service, providing time-consuming pedicures limited their earnings. Significantly, Urban Company increased the rates for pedicures after repeated complaints from the workers. But since there was a simultaneous hike in the platform's commission, worker earnings from pedicures did not change.

## Training videos

Urban Company also uses the app to send training videos, which workers then have to watch. These videos became more important during the pandemic as in-person or face-to-face training was no longer possible. The app also tracks video views with workers receiving a green check mark next to their name once they've watched the videos. The videos cannot be fast-forwarded as they are interspersed with multiple-choice questions that have to be answered. If they fail, workers have to watch the video again and answer the questions once more.

## Replenishing products

Urban Company expects workers to purchase products through the platform by placing orders on the app. The platform tells workers that not only will they be fined if they buy products from the open market, but they could even be barred from working on the platform. Workers reported that the company tracks their work activity to estimate the time that should pass between product purchases. If a "reasonable" duration has passed without a new purchase order, the platform calls the worker to enquire about how she is taking new orders without restocking. Interviewees also reported that Urban Company performs audits to check if the workers were using company products. These audits are sometimes unplanned, functioning as a surprise check on workers at their own homes. Post-lockdown, the platform conducts its product audits through video calls on Zoom, sometimes while the worker is providing a service to a customer.

Workers said that they buy disposable materials, such as waxing strips and threading materials, on the open market as the brand used is not an important factor for such products. Apart from these types of item, they buy all other material, such as facial creams, from the platform to protect themselves from liability in case a customer complains. Since it could take up to a week for the platform to deliver stock, workers reported sometimes making emergency purchases from the open market. All workers reported keeping adequate stock at hand since Urban Company offered free delivery on orders above 2,500 INR.

Yes Madam also expects workers to buy products from the platform. If there is an urgent need, workers can buy products from other sources provided they share a picture of the product with their manager and receive approval to make the purchase.

## Ratings

After the service has been carried out, customers rate the workers (ranging from zero to five stars), with Urban Company keeping track of the ratings. The tracking happens in two ways: one, life cycle ratings (the cumulative rating score of all the services undertaken by the worker), and two, the average of the last 50 ratings and reviews. Workers start with a five-star rating when they first join the platform and must maintain a four-star rating or higher to remain on the Urban Company platform. In August 2019, the platform began to allow workers to rate their customers.

Initially, workers were able to see who had rated them, but the platform has since changed this. Ratings and reviews are now kept anonymous, although workers can see their average ratings and read the feedback they have received. The platform introduced this opacity to protect customer privacy after workers confronted customers who had given them low ratings. This is because worker profiles become locked if the ratings dip below four, meaning they were unable to accept any work. Locked profiles are only opened again once the worker has undergone retraining in the areas where they have been rated poorly.

Yes Madam workers are also rated on a scale of one to five. The app allows workers to see how specific customers rate them, and they can also rate their customers. However, unlike Urban Company, Yes Madam's workers are unaware of how the platform calculates the rating it shows to customers.

### **Impact of low ratings**

Ratings are a matter of concern for workers as they directly impact their ability to work. One worker mentioned that ratings are so crucial that she knew of colleagues who distract the customer by asking for a glass of water and then quickly give themselves a 5-star rating using the customer's phone. Others mentioned that they felt bad and discouraged when they received bad ratings. They reported wanting to quit the job but refrained from doing so because of family responsibilities. They also reported anger, frustration and loss of sleep. One interviewee said that her religion and the Bible were a great solace in controlling her anger. Another worker said it was hard for her to forget the person who treated her badly and then gave her a bad rating. She said: "I have just gotten one bad review from someone and she was 10–15 years younger to me. I felt very bad and dirty. I have not forgotten her, nor forgotten her house. I still remember where she lives, and I know her address by heart."

Urban Company began permitting workers to rate customers in August 2019. When asked if they gave customers bad feedback, workers said they did so when the situation warranted it. Another said: "when I give a bad rating to a customer, I also write a long note explaining why I did so". Workers reported enduring difficult conduct from customers because their ratings were on the line. One reported that she was once asked to perform certain services on the wife as the husband watched, which made her feel very uncomfortable so she left.

However, most of the difficult behaviour workers encounter is because of customers complaining about the service they have received or refusing to pay. Workers in the NCR reported these incidents more than the Bangalore workers. One worker even explicitly asked her area of service to be limited to south Delhi, even though she did not live close by, because she felt she would receive better treatment from south Delhi customers. When asked to comment on the rating system, Urban Company workers based in the NCR said they were aware of how the rating system worked and knew that their rating was based on an average of 50 jobs they had performed. However, they were not aware that they would have to consistently receive five stars on 10 jobs to improve their ratings. Workers in Bangalore, on the other hand, were less sure about how the rating system worked and largely felt that having given their best, they could not really control the outcome beyond that.

## Collective organisation

Urban Company requires affiliated workers to regularly interact with their category managers. Before the Covid-19 pandemic, workers also had to attend training sessions for new products and service launches at their affiliated hubs. The platform does not, however, encourage or accept worker-governed bodies as a channel for interaction with workers, and limits itself to management-led initiatives. These initiatives include a helpline and WhatsApp groups for workers to voice grievances, regular focus group discussions with small groups of workers hosted either at the company offices or in cafes, and a quarterly job satisfaction survey for workers to give feedback on their experience with the platform and offer input on policies they would like changed.

Yes Madam workers also have WhatsApp groups for formal communication, organised by region. For example, there is a west Delhi group that includes all workers and administrative staff. Managers and trainers communicate via these groups. During the lockdown, the WhatsApp groups were used to disseminate information and training videos. As management are present on the WhatsApp groups, they are not used for collective action.

Worker interviews revealed that they do not have separate WhatsApp groups just to communicate with each other.

## Bypassing the platform

When asked if they bypassed the platform to secure customers for themselves, therefore saving on commission, the workers displayed a noticeable degree of employer loyalty. While a few workers said that they did freelance for their regular customers, a majority felt that remaining with the platform offered a better deal overall. Other workers refrained from bypassing the app as they feared being blocked by the platform if caught.

Workers highlighted a symbiotic relationship with the platform, with each needing the other for survival. As one put it: “if we earn, they earn, and we need leads since we work on commission basis. If everybody starts bypassing the platform, how will the company survive?” Workers also said they felt more valued if they visited customer homes through the app and reported that their uniforms and kits invoked curiosity among women when they were outdoors, some of whom would then call them home for services. However, interviewees said that they would ask them to order through the app instead as they found bargaining over rates bothersome. One worker also mentioned that she felt secure going through the app. If anything happened, she could call the helpline for help.

When workers received request for add-on services once they had arrived at a customer’s home, depending on what was asked for, they would decide to do the job and keep the money for themselves. One worker in Bangalore reported showing her make up portfolio to

customers when she visited them for regular beauty work and leaving her number with them. She reported that the tactic enabled her to gather customers for her makeup work, which she performed off the platform. A couple of workers in the NCR also mentioned using customer visits as opportunities for direct selling of Avon lipsticks and ModiCare products.

Workers who bypassed the app also reported using the platform's products for their non-platform services. They reasoned that the platform never questioned them if they purchased more than was required and only asked questions if they ordered less than what the platform believed they should have been using.

## Professionalisation and self-identity

When asked about their sense of professional identity, workers repeatedly listed the same set of attributes, emphasising professionalism rather than entrepreneurialism. They agreed that wearing clean ironed clothes was of utmost importance, along with light makeup that included lipstick, eyeliner, and hair tied in a neat bun with a net cover. One interviewee compared beauty workers to flight stewardesses and nurses, saying that, if they were not smartly turned out, customers would not allow them near their bodies. Workers mentioned that being well groomed was essential as the face is the first thing that customers notice. Next, it was important to be soft-spoken and attentive to customers' needs.

Beyond physical appearance, other attributes such as being punctual, laying out and arranging the set up before beginning work, cleaning the workspace after work was completed, and not hurrying through the service all contributed to being a professional. One worker even said that just like a doctor can give a patient a diagnosis, being a professional beauty worker means that she too should be able to look at a customer's skin and suggest an appropriate facial treatment.

## Effects of the Covid-19 pandemic

When field research for this study was completed in November 2020, the death toll due to the Covid-19 pandemic was over 170,000 in India.<sup>47</sup> Beauty workers finding work through platforms, or employed by salons, saw their work and income drop overnight, while customers resorted to do-it-yourself treatments at home. The section below describes the impact this major health crisis has had on beauty workers' access to work and their income as well as describing the way in which the platforms have responded.

### On receiving work

Work began slowing down even before India formally announced the lockdown on 24 March 2020. Customers had already trickled down to nothing and the lockdown meant that the platforms could not officially operate as businesses. Urban Company cancelled all jobs

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<sup>47</sup> World Health Organisation 2021

scheduled on and after 22 March without levying any fines on the workers. Throughout the lockdown period, a couple of workers reported that they continued to freelance for a limited number of customers who had called them on their personal numbers. However, most workers reported having nothing to do during the lockdown and feeling desperate for work. One worker reported that she was even ready to do domestic work but was unsuccessful in securing any jobs as people stopped allowing outsiders into their homes.

### **On income**

Incomes were badly hit by the lockdown and workers faced significant loss of earnings. Urban Company offered its workers a loan up to of 5,000 INR and most availed themselves of it. However, all workers reported that their savings were depleted because of the lockdown and that they had to borrow money from family and friends to keep themselves going. Yes Madam did not offer its workers any loans.

### **Platform communication with workers**

Urban Company workers reported receiving regular calls from their category managers, checking in on them and telling them to be patient. The category managers also advised them about safety and suggested they take care of their finances until the situation improved. The platform also announced a compensation of 1,000 INR a day for 14 days for workers who contracted the virus while working. Yes Madam did not offer any insurance to its workers.

### **On working**

All through the lockdown, Urban Company workers reported receiving messages from the platform about training sessions on working during the pandemic. Training included wearing protective gear. The platform began charging customers a 'hygiene fee' to recoup the costs of providing workers with masks and gloves. Workers also reported training sessions on, for instance, performing threading with the thread held around their necks instead of between their teeth. Furthermore, workers had to make videos of themselves demonstrating these new techniques and post them on the app in order to be eligible for work. As the situation normalised, workers had to put their temperatures into the app every day, otherwise they wouldn't be allocated any new customers. Workers reported an increase in the time taken to complete services because it took them longer to set up, sanitise the tools, and carry out their services while adhering to the pandemic regulations on hygiene that the platform required them to follow. Workers with Yes Madam mentioned receiving training videos via WhatsApp as the lockdown began to ease.

## **Future aspirations**

Overall, workers expressed satisfaction with working through the platforms, outside of their desire for better compensation. As a result, many workers wanted to work on the app as long as their health permitted but were apprehensive about what their prospects would be as they grew older. They were concerned about the implications of having to work long hours to meet



targets. Workers nearing 40 years of age or older were especially concerned about the ease with which they could carry their heavy bags and climb stairs with the passage of time, in addition to performing physically demanding jobs such as massages and pedicure services. One interviewee reported that she developed lumbar disc problems and found pedicures especially hard to do. She had to send her MRI scans to Urban Company before they stopped assigning her pedicure jobs. Another interviewee reported skin pigmentation owing to irregular meals and being outdoors every day.

The only sense workers had of being entrepreneurial fell outside of the existing relationship they shared with the platform rather than within it. A few workers mentioned wanting to begin their own salons while a few mentioned starting a business on the side that would not demand too much capital investment, such as trading in garments.

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## The experience of customers

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## Customers' profile

The average age of the customers interviewed was 29. The youngest interviewee was 22 and the oldest was 35. All had attended university, 11 had an undergraduate degree and 19 also had postgraduate education. Two thirds of the customers were in full-time employment, three were freelancers, four were students and three were unemployed. The vast majority of customers (25 out of 30) had an annual income of 1,000,000 INR and above.

## Switch to online platforms

The main incentive for customers to book beauty and grooming services on an app is the saving of time and effort. Rather than having to go to the salon, the service comes to their home. Customers found being able to determine the time slots at which they could order services, instead of making appointments at salons convenient. Also, booking with salons meant they might not get their preferred slots or be charged extra for peak-time services such as post-work evening slots. Price was also a prominent factor encouraging customers to explore online services. One customer reported that she now got beauty services more frequently as it was cheaper online. Another mentioned feeling safer getting massages at home because sometimes the news would feature salons that were fronts for activities such as prostitution.

Receiving services at home also gave customers a greater sense of control. They mentioned how services take longer in salons as the workers are often attending to other customers too. Customers also found that, unlike their offline counterparts, online workers did not body shame them or try to force additional products and services on them in a bid to meet their targets. The customers reported that at home, it was far easier to observe whether the worker was using fresh disposable sheets and products, since they would open them in front of the customer unlike in offline salons where hygiene and cleanliness is not always guaranteed.

Other factors influencing the decision to seek online services the opportunity to create a comfortable and relaxing atmosphere at home by, for instance, choosing which songs to play while receiving the services. Additionally, the customers found that the chatty and gossipy environment in salons was not very relaxing. When booking online services, they could relax at home and not worry about having to travel after receiving their massage when they would rather just sleep.

## Offline vs online services

Even as they begin to use new online platforms and show loyalty to them, customers still persist with offline services depending on the type of service they need, the kind of infrastructure required for the completion of the job, and the urgency with which they need it done.

# Customer demographics



Figure 5: Interviewed beauty and wellness platform user demographic information. Image and data source: Digital Future Society 2021.

Customers reported not ordering hair-related services on the app because they have their own preferred stylists or branded salons that they trust. This is because hair-related services require particular skills and customers feel that they could go back to a salon to get something fixed if it wasn't right, while an app would not support repair work. Customers are willing to travel as far as 15 kilometres to see their preferred hair stylist, typically found via personal recommendations.

Customers also displayed a preference to go offline for services that require certain infrastructure or equipment. For spa services, for example, customers pointed out that space constraints at home often restrict the use of equipment such as the folding beds that workers would bring with them. For hair-related services, customers prefer having their hair washed by the stylist in basins specifically designed for the purpose, rather than doing it themselves at home. Some customers said they would opt for spa and massage services offline when they wanted a change, to relax away from the home environment, uninterrupted by household disturbances.

For minor grooming services, such as frequent threading-related work on the eyebrows and upper lip, customers often sought offline venues since platforms enforced a minimum spend. For instance, Urban Company requires customers to order services worth at least 599 INR per order. In these instances, participants said they would visit offline salons for their grooming needs.

Finally, participants said that they would go to an offline salon in an emergency for walk-in-services as ordering a service immediately was not always possible on the platforms.

## Rating workers

Whereas customers were mostly indifferent to the worker providing their services, specific worker preference usually depends on the kind of service ordered. Customers are more likely to request particular workers for services like facials, massages, and threading in contrast to regular grooming tasks such as waxing. However, all customers mentioned that they read reviews and looked at ratings before selecting a worker.

When rating workers, customers revealed they were aware the ratings affect the workers' livelihoods and said they usually rated them between four to five stars if they had no complaints. Customers said they would rate a worker poorly if they were unresponsive to feedback while performing the service and if they caused them more pain than was necessary during a treatment. They also said that they were fine with some delays at the beginning of a service as they were aware that traffic, or trouble finding their house, could cause a worker to arrive late. Therefore, they do not rate workers poorly if this happens.

Customers mentioned that workers specifically reminded them about rating them on the app once they had provided the service. Some workers are more insistent and aggressive than others when making this request. One participant mentioned that sometimes workers will not leave until they are satisfied that they have been given a five-star rating. One customer mentioned skipping feedback because she was lazy. Participants said that they would give feedback directly to workers for the service-related components, but would probably report negative feedback relating to hygiene on the app.

On the other hand, customers were not always aware that workers were also rating them, although they did know that Ola and Uber drivers rated them. However, all customers felt that it was fair and thought that workers would rate them based on their courtesy and how welcome they made the worker feel. Customers were also not aware that they could be blacklisted on the app, but again felt that it was a fair practice to protect workers from any untoward incidents in a customer's home.

## **Bypassing the platform**

When asked whether they would consider bypassing the platform and contacting workers directly to solicit services, most customers were not keen to do so but mentioned that workers regularly offered their services directly. Two customers did mention that they had reached out to workers directly since it meant saving on the 18% GST (Goods and Services Tax) levied on services. However, the main reason for not wanting to bypass the platform was that the comforting option of reaching out to customer service in the event of a dispute would no longer be available if they did. Two customers in Bangalore mentioned that the worker rejected their suggestion to bypass the app, which acted as a deterrent against asking other workers they met through the app. Interestingly, customers said they would rather bypass the Urban Company app with the platform's home service workers rather than with beauty workers.

## **Customers' experience with the app**

Customers reported they would rarely interact with the app beyond ordering services, selecting workers, making appointments and rating workers. Urban Company customers mentioned they would interact with customer service in two instances: worker delays and cancellations. Customers also reported uninstalling the app once they were done with the service, so it would not be a constant fixture on their phone. No customer had read the app's terms and conditions. However, customers did mention reading user reviews before beginning to use Urban Company.

## **Payments**

Customers said they preferred making digital transactions to pay for services once complete. One customer reported pre-paying for services, saying she would rather not deal with making a payment after services as she usually feels sleepy. Customers reported receiving requests from the workers for direct payment by cash or into their own digital wallets instead of via the platform's payment method. A couple of customers reported keeping cash handy, recognising worker preference for liquidity. Tipping is rare, as customers felt they were already paying enough for the services, although a couple of them said that they did tip in the range of 50–150 INR.

## Interpreting workers' professionalism

Owing to the training that platforms offer their workers, customers ascribe a professional identity to the platform workers. As a result, customers are not particular about having a preferred worker providing the services they order. This is despite both apps offering the choice. Customers revealed that consistent punctuality, neatness, cleanliness and an organised way of working, coupled with good ratings and experience, contributed to the professional identity of online workers.

The quality of the actual work performed on their bodies was also mentioned as a determining factor when gauging the professional identity of a worker. The pain experienced through services such as threading recurred in several interviews and customers mentioned that professional workers have the skill needed to minimise pain. Other observations related to performing facial treatments and whether workers were able to apply just the right kind of pressure during massages. Customers also mentioned listening to and following instructions, and putting the customer comfort first, as signs of professionalism. For example, several customers mentioned that a worker's responsiveness to feedback about wax temperature was a mark of professional identity.

Lastly, customers also referred to their pre- and post-service experience with the app. In the pre-service observations, customers mentioned being impressed by how self-reliant the workers are, having every possible tool required for various tasks including spatulas, mixing bowls, pedicure tubs, clean sheets, paper towels, etc. Customers also mentioned that they were impressed by how the workers required no instructions when setting up for a service and how even cleaning the space post-service required little intervention.

## Effects of the Covid-19 pandemic

### Communication from the platform during the pandemic

Since the fieldwork coincided with the pandemic, customers were also asked questions about the communications they were receiving from the platforms during this time. Customers reported seeing advertisements on social media when the platforms resumed services when the lockdown eased, while those who had the Urban Company app installed on their phones reported receiving notifications and messages about services resuming and discount offers. The platform had also launched an advertising campaign with television celebrities who endorsed the platforms' safety practices in light of the pandemic. However, not all customers were aware of the celebrity endorsements and, even those who were, said it did not influence their decision to order a service.

## Ordering services during the pandemic

Consumer accounts of their beauty and grooming routines during the pandemic ranged from ordering online services because they could control hygiene at home, to deferring beauty services indefinitely and relying on do-it-yourself (DIY) routines. Customers reported resorting to DIY grooming tasks such as cold wax and face and hair masks. However, most found self-waxing and threading messy and some reported being helped by and helping their partners with tasks such as haircuts.

Urban Company required customers who ordered online services to submit a self-declaration about their health status to the platform. But customers reported that their declaration was not verified in any way. Customers also reported that workers wore protective gear, gloves and masks and sanitised everything before beginning service. This was viewed as both trustworthy and a mark of professionalism. Two customers mentioned they would ask the worker about the other places she had visited before coming to their home. One customer even picked up and dropped off the worker to ensure safety. Another customer said she would ensure she took the first slot of the day so she was the first person the worker would visit. All customers said they would be willing to pay an additional 50–100 INR towards hygiene charges. However, one customer also said she would use the app less frequently if the cost was increased. Customers who used Yes Madam did not report any changes to service delivery conditions.



# Conclusion

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This research aims to provide a snapshot of the experiences of both workers and customers using two of the largest digital labour platforms operating in the beauty and wellness industry in India. There are several insights to draw from this work.

First, workers were largely drawn to platform work by the higher salaries and increased control over their own working hours, compared to working in an offline salon. When comparing working through the app to bypassing it and working freelance, the majority of workers felt that remaining with the platform was, overall, a better deal. Advantages of working through the app include not having to bargain with customers over prices and feeling more valued when visiting customer homes. Workers also reported that their uniforms and kits invoked curiosity among women they would meet outdoors. Some reported feeling safer going through the app as they could call the helpline in the event of a problem.

In the case of both Urban Company and Yes Madam, workers are independent contractors. In both cases, the platforms control key aspects of their work; workers can only use company products which have to be purchased from the platform and they have to wear a uniform and attend training at the start of the job and on an ongoing basis. The companies also question workers when they do not accept services and track worker progress on jobs, requiring workers to submit updates about their movements on the app. Since the start of the pandemic, workers must also send photographs of themselves wearing masks and sanitising both themselves and the workspace.

Across the board, workers were concerned about ratings, especially about receiving low or bad ratings and reviews. Initially, workers could know which customers had reviewed them. The platform later changed this to protect the privacy of customers but there are ways that workers can get around this. Since August 2019, Urban Company has allowed its workers to rate their customers.

Regarding the experience of customers, they find home services booked on the app have several advantages. The main one is saving time and effort. Price is another reported advantage as customers find app-based services cheaper than going to a salon. Customers also like that they can create a relaxing atmosphere at home, without salon staff pressuring them into buying certain products or having other treatments. At the same time, recreating a spa like atmosphere can be hard at home, so for certain services, customers would prefer to attend a salon.

That said, the way in which sectors and services are 'platformised' depends on a number of issues, and trust is one of them. Customers generally continue to go to traditional salons for specific services such as hairdressing. They are willing to travel up to 15 kilometres to go to their preferred hairstylist whom they know and trust, and whose aesthetic style they know fits with their own. However, it is not as important who provides other services such as waxing or threading. This reflects consumer behaviours in the offline sector where customers often have a preferred salon for services considered to require certain skills, such as hairdressing.

The field research coincided with the opening months of the Covid-19 pandemic, a health crisis that, by the time the field research ended, had caused over 170,000 deaths in India.<sup>48</sup> Beauty workers were among the professionals who saw their work and income drop overnight while customers resorted to DIY treatments at home. According to our interviewees, although Urban Company offered them a loan, this was not enough to prevent workers' savings being depleted. As time passed, the lockdown measures eased and work picked up with platforms providing training and requiring workers to implement safety protocols.

## What is next?

Looking forward, further research could address the following questions:

- What is the experience of workers and customers using digital labour platforms in the beauty and wellness sector in other countries, for example Australia (where Urban Company already has a presence)?
- What are the main themes encountered when studying the dynamics of platform labour in sectors that are highly feminised? What are the similarities and differences between sectors and the experiences of workers?
- What are the different business models and relationships between platforms and workers in different parts of the world in highly feminised sectors?
- Which other highly feminised sectors beyond homecare, domestic work and beauty work are also experiencing a rise in digital platform labour?

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<sup>48</sup> World Health Organisation 2021

# Annexes

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# Annex 1: International currency reference tables for figures included in the report

## Upfront and ongoing costs for workers

	INR	EUR	GBP	USD
	75.1	0.84	0.73	1
<b>Urban Company training and onboarding fee</b>	<b>8,000–10,000</b>	<b>89.17–111.48</b>	<b>77.37–96.72</b>	<b>106.66–133.34</b>
<b>Yes Madam training fee (if worker has no prior experience)</b>	<b>20,000</b>	<b>222.82</b>	<b>193.34</b>	<b>266.66</b>
<b>Urban Company required initial product purchase</b>	<b>40,000</b>	<b>445.92</b>	<b>386.88</b>	<b>533.40</b>
<b>Urban Company free delivery of products on orders over:</b>	<b>2,500</b>	<b>27.88</b>	<b>24.18</b>	<b>33.34</b>
<b>Yes Madam minimum inventory level</b>	<b>5,000</b>	<b>55.75</b>	<b>48.36</b>	<b>66.68</b>

## Earnings

	INR	EUR	GBP	USD
	75.1	0.84	0.73	1
<b>Typical offline monthly salary</b>	<b>20,000</b>	<b>222.82</b>	<b>193.34</b>	<b>266.66</b>
<b>Urban Company expected minimum monthly earnings</b>	<b>30,000</b>	<b>334.35</b>	<b>290.13</b>	<b>399.99</b>
<b>Urban Company potential monthly earnings</b>	<b>70,000</b>	<b>780.15</b>	<b>676.90</b>	<b>933.31</b>
<b>Transport allowance</b>	<b>100</b>	<b>1.11</b>	<b>0.97</b>	<b>1.33</b>
<b>Platform referral incentive</b>	<b>1,000–3,000</b>	<b>11.14–22.28</b>	<b>9.67–19.33</b>	<b>13.33–26.67</b>

Image source: Digital Future Society. Data source: XE.com 2021<sup>49</sup>

<sup>49</sup> Exchange rates taken from XE.com on April 15 2021

## Fines and penalties

	INR	EUR	GBP	USD
	75.1	0.84	0.73	1
<b>UC Credit</b>	10	0.11	0.09	0.13
<b>Late arrival deduction</b>	10-20	0.11-0.22	0.10-0.20	0.13-0.27
<b>No show fine</b>	Up to 500	Up to 5.57	Up to 4.83	Up to 6.67

## Customer costs and information

	INR	EUR	GBP	USD
	75.1	0.84	0.73	1
<b>Average tip for service</b> (rarely given)	50-150	0.56-1.67	0.48-1.45	0.67-2.00
<b>Annual salary level of most customers</b> (25 out of 30)	1,000,000 and above	11,153 and above	9,677 and above	13,339 and above

## Pandemic costs and compensation

	INR	EUR	GBP	USD
	75.1	0.84	0.73	1
<b>Urban company loan offered to workers when pandemic closed operations</b>	5,000	55.75	48.36	66.68
<b>Urban company daily compensation for workers contracting coronavirus while working</b> (14-day duration)	1,000	11.14	9.67	13.33
<b>Hygiene charge customers willing to pay</b>	50-100	0.56-1.11	0.48-0.97	0.67-1.33

## Annex 2: Worker interview questionnaire

### Demographics

1. Name
2. Age
3. Education
  - a. Until Grade 10
  - b. Grade 10–12
  - c. Undergraduate
  - d. Post-graduate
4. Where are you from?
5. When did you move to Bangalore/NCR? (number of months/years)
6. Marital status
  - a. Married
  - b. Unmarried
7. Do you share your accommodation?
  - a. No
  - b. If yes,
    - i. Do you live with your parents (if minor)?
8. Number of spoken languages
  - a. Spoken, how many, specify
  - b. Read, how many, specify
  - c. Which language do you communicate in with the customers?
9. Any assets owned? (can choose multiple answers)
  - a. Car
  - b. Motorcycle/scooter
  - c. (Smart) Phone (questions based on this response asked later)
    - i. What is the purpose of use?
      1. Communication
      2. Information
      3. Entertainment
      4. Source of alternative means of employment
      5. Other, specify
  - d. Computer/ Laptop/ Tablets
  - e. Bicycle

## Working through an online platform

10. Have you always worked in the beauty industry?
  - a. If yes,
    - i. How long have you been in the profession?
    - ii. Why did you choose this profession?
  - b. If no,
    - i. What profession were you in earlier?
    - ii. Why did you switch to the beauty industry?
11. Regarding online platform work
  - a. Have you always worked through online platforms?
  - b. How many online platforms have you worked for?
  - c. Which online platform do you work for?
  - d. How long have you worked for this online platform?
12. What kind of professional training have you had?
  - a. Formal training and certifications
    - i. No
    - ii. Yes
      1. Name of the certificate
      2. Who (the organisation) awarded it?
      3. When was it awarded?
  - b. Apprenticeship (OJT)
13. What service are you best known for among customers?
  - a. What do you think attracts customers to you (appearance, conduct, quality of work)?
  - b. Do you think you need to put in extra effort to attract more customers?
  - c. What does the term 'professionalism' mean to you?
14. Do you simultaneously pursue any other employment?
  - a. If no, why?
  - b. If yes,
    - i. Beauty work on other online platform(s)?
    - ii. Work in some other sector online?
    - iii. Beauty work offline?
    - iv. Other work offline?
15. Online platform expectations
  - a. How many hours/ services/ customers are you required to cater to in a day?
  - b. What type of services do you render typically?
  - c. What is the minimum number of hours you are required to stay logged into the app?
  - d. Is there a time window that you need to be logged on it (eg 0900 hours to 1900 hours)?
16. Your working hours
  - a. How many hours do you typically work in a day on the app?
  - b. How many days do you work in a week?
  - c. How many customers do you provide services to on a daily basis?



17. How do you commute to a customer site?
  - a. Two-wheeler
  - b. Car
  - c. Cab
  - d. Two-wheeler rental service/sharing (specify which of the two)
  - e. Public transport (like bus), specify
  - f. Walk
18. How much time are you willing to spend on travel to deliver services?
19. User-friendliness of the app
  - a. Is the app available in the language you are comfortable with?
  - b. Do you find it user-friendly (maneuvering)?

## Income/Savings

20. Are you the sole breadwinner?
  - a. Yes
  - b. No
    - i. Who else contributes to the household?
    - ii. Do you have any dependents? If yes, how many?
21. What is your source of financial support at times when you do not get work via the app?
22. Remuneration
  - a. Do you receive a minimum XX amount on average?
  - b. How frequently do you get paid?
    - i. Daily
    - ii. Weekly
    - iii. Fortnightly
    - iv. Monthly
  - c. How much are you able to save in a month (based on the income)?
  - d. How much do you think you deserve to receive in addition to how much you make now? (negotiation with the online platform) (reservation wage)
23. Payment mode
  - a. On what basis do you get paid (number of hours, services, etc.)?
  - b. Do you receive allowances for the following other than services that you provide?
    - i. Travel
      1. How much do you spend on it monthly?
    - ii. Material
    - iii. Internet usage
    - iv. Other, specify
24. In addition to the salary, are you compensated with the following
  - a. Provident Fund
  - b. Health insurance
  - c. Life insurance
  - d. House rent allowance
  - e. Others, specify

25. What mode of payment do you prefer after rendering services? (online transaction, cash)
26. What mode of payment is offered via the app?
27. Do you have a bank account?
  - a. Yes
  - b. No

### Legitimacy/Onboarding

28. How did you hear about the online platform?
29. What influenced your decision to join the online platform?
30. Onboarding process
  - a. Was there a personal interview during the onboarding process?
  - b. Did you have to provide any references to join the online platform?
  - c. What documents were you asked to produce when you decided to sign up to the app?
31. How did you encounter the terms and conditions of the app?
  - a. When were you first exposed to the official terms and conditions?
  - b. What language were they in?
  - c. Who read them to you?
    - i. Self
    - ii. By an online platform representative
    - iii. By a friend/ family
    - iv. By a colleague
  - d. Were there aspects of the terms and conditions you did not follow/understand?
    - i. No
    - ii. If yes, whom did you turn to?
      1. Explained by online platform representative
      2. Explained by friend/ family
      3. Explained by a colleague
32. Training process at the time of onboarding
  - a. Which language was the training provided in?
  - b. How long was the training?
  - c. Did it give you extra or new skills that facilitated your work (a new technique, language classes, grooming, self-presentation on the app to a potential customer)?
  - d. How often do you go back for training or refresher courses?
  - e. Are there company specific forums for your enhancement of a professional skill or soft skills (online tutorials)?
33. Was there an assessment test at the end of training?
34. Toolkit
  - a. Did you receive any toolkit from the management?
    - i. No
    - ii. If yes,
      1. How much did you pay for it?
      2. How do you replenish it?
      3. Are there any guidelines provided by the online platform that you ought to adhere to while replenishing the kit?

## Coordination with the management of the app

35. How and when does the management communicate violations of terms and conditions?
36. Do you have the opportunity to meet online platform representative(s) regularly?
  - a. How often do you meet?
  - b. What is the mode of encounter?
    - i. Call center
    - ii. One on one
    - iii. Group meeting at a local/regional hub
  - c. What is the purpose of the meetings?
37. Do you have any (in)formal association of beauty service providers?
  - a. If no, why not?
  - b. If yes,
    - i. What kind?
    - ii. What do you discuss on such online platforms?
    - iii. Do you have organised channels that may represent your woes and concerns to the management? (ability to unionise)
38. Have you recommended the online platform to another beauty service provider?
  - a. Yes, why?
  - b. No, why?

## Customer relations

39. Do you know how customers are allocated to you?
40. Can you choose/refuse a particular customer?
  - a. Yes (shows preference), how?
  - b. No (shows discrimination), how?
41. Do you have a say in the choice of services you offer (time/cost return)?
42. Do your customers always approach you via the app?
  - a. Are you open to the idea of bypassing the app to receive work?
43. Services and estimated time delay
  - a. What are the repercussions of not being able to fulfil the service in the given time?
  - b. Do you lose customers because of it?
  - c. How do you ensure service completion on time?
44. Have you provided services to more than one customer at a single location and at a single visit?
45. Ratings and feedback
  - a. Do you know how the rating system works?
  - b. Do you know who rates you how much after the service?
  - c. Do your customers give you feedback on your services?
  - d. Do you pay attention to the rating or the comments/feedback of customers?
  - e. How do you deal with negative feedback?

46. How do you deal with difficult customers?
  - a. What do you do when they refuse to pay the amount for the services that the app asks them to pay?
  - b. Has it ever happened that they ask you to provide more services than what they signed up for via the app?
    - i. No
    - ii. Yes
      1. How do you cope with it?
  - c. Any other negotiation/bargaining with the customer?
    - i. Are you able to quote and negotiate the price that suits you best for the service you are providing?
47. Do you get to rate the customers?
  - a. Yes
  - b. No
48. Have you ever recommended a customer to join the online platform?

### Urban Company specific questions

49. What are the things that you discuss with customers via the chat function (agency)?
50. Is the use of UC Credits a convenient way of getting work on the online platform?
51. Does the refund policy work effectively?
52. Have you watched the UC YouTube tutorials?
  - a. No
  - b. Yes
    - i. Do you understand what they are trying to explain?
    - ii. Have they helped you in broadening your customer base?

### Covid-19 lockdown and its aftermath

53. Did you experience a drop in clientele even before the lockdown was formally imposed in the country?
54. If you were not able to work during the lockdown, which was the last day of working?
55. If you were you able to work during the lockdown:
  - a. Personal Protective Equipment
    - i. Did the online platform provide it?
    - ii. Did the online platform reimburse it (if you purchased it on your own)?
  - b. Working requirements
    - i. Did the minimum number of hours/clients/services change during this period?
    - ii. Did the online platform assist with obtaining the travel passes?
    - iii. How many days did you work during the pandemic?
    - iv. Did the size of your micro-localities remain the same?
    - v. Was the deduction of commissions postponed to financially assist you in times of the pandemic?
56. Did you receive any training on how to operate after the lockdown gets lifted?
  - a. If yes, over what (disposable kits, sanitizing surface strategy, etc.)?

57. To what extent did you experience a drop in income during the lockdown period (calculate in %)?
58. How did you manage to survive?
- a. Dipped into personal savings
  - b. Relied on family/friends
  - c. Switched occupation, if so, to what
  - d. Chose to return to hometown
  - e. Freelanced
    - i. How did the clients contact you?
    - ii. Challenges experienced
      1. Traveling to site
      2. Getting raw materials
59. What kind of discussion did the workers/colleagues have amongst themselves?
60. Communication from the online platform
- a. What mode of communication was adopted by them?
    - i. Phone calls
    - ii. Messaging
    - iii. Notifications
    - iv. Other, specify
  - b. Type of communication:
    - i. Unidirectional
    - ii. Bidirectional
    - iii. Group communication/circular
  - c. What was the frequency of communication?
  - d. Over what did the online platform communicate to workers during the lockdown period?
    - i. Wages
    - ii. Health and safety/Personal Protective Equipment
    - iii. HR compliance procedures
    - iv. Insurance
  - e. What concerns were left unaddressed?
61. Did the pandemic lead to change in perception of your occupation (choice and security of the occupation)?
62. Post-lockdown
- a. Did you go back to the same online platform?
  - b. When was the first day of returning to work?

### **Beyond the online platform**

63. Has the social perception of your work changed since you started delivering services via the app?
64. How has your own perception of work changed since you began delivering services over the app?
65. How long do you see yourself continuing on the app?
66. Any other information you wish to add?

## Annex 3: Customer interview questionnaire

### Demographics

1. Name
2. Age
3. Education
  - a. Until Grade 10
  - b. Grade 10- 12
  - c. Undergraduate
  - d. Post-graduate
4. How long have you been living in Bangalore/NCR?
5. Which neighbourhood do you live in?
6. Languages known
7. Employment status
  - a. Unemployed, looking for work
  - b. Unemployed, not looking for work
  - c. Full-time work
  - d. Freelancer
  - e. Stay at home
  - f. Student
8. Income bracket of the household per annum (in INR)
  - a. Below 2.5 lakhs
  - b. 2.5 to 5 lakhs
  - c. 5 to 10 lakhs
  - d. Above 10 lakhs

### Past experience of visiting traditional beauty salons

9. How did you seek beauty and grooming service routines before you started using online platforms?
10. Did you have a particular salon or service provider or would you try different places?
11. What factors bound you to a particular offline salon or service provider?
12. How far did you travel to access these services?

### Reasons for switching to online platform

13. Did prior use of online platforms for other services (such as ride hailing and food delivery) influence your decision to seek beauty services online? If yes, how?
14. About the online platform-based services
  - a. Since when have you been using online platforms?
  - b. How did you first hear of online beauty service platforms?
  - c. What prompted you to try an online beauty service platform?

15. In what ways have online platforms changed your beauty and grooming routines?
16. Name of the online platform used
  - a. Which online platform do you generally use?
  - b. When did you start using this platform for beauty services?
  - c. Are you aware of other online platforms that offer online beauty services beside the one that you use?
    - i. No
    - ii. If yes, have you tried their services?
  - d. How many online platforms have you used?
17. Services on the platform
  - a. How often do you order beauty services online?
  - b. What kind of services do you order?
  - c. Are there services that you wouldn't order online? Why?
  - d. Do you avail service-bundles or distinct services?
  - e. Do you order services individually or as a group?
18. Time/punctuality
  - a. What is your preferred time of the day for availing beauty services?
  - b. Have you turned away service providers because they were not punctual?
  - c. Have you experienced delays in service offerings beyond the promised time?
19. Mode of payment
  - a. On average how much do you spend on beauty services per order?
  - b. What mode of payment is offered by the app?
  - c. What mode of payment would you prefer?
20. Do you find the app user-friendly?
  - a. Is the app available in your preferred language?
  - b. Have you ever communicated with the customer service of the app?
21. How would you describe your experience with online platforms based on the following?
  - a. Quality of service(s) received
  - b. Cleanliness and hygiene
  - c. Services delivered at privacy and convenience of your home
22. Under what circumstances would you still visit an offline parlour?

### **Covid-19 lockdown and its aftermath**

23. When was the last time you got a beauty service done from an online platform worker?
24. Hygiene
  - a. To what extent do you think concerns with hygiene are more pervasive?
  - b. To what extent has hygiene influenced your decision to change the mode of receiving services?
  - c. Do you think you control hygiene better if you receive services at home?
  - d. Are there things that you have now begun asking the service provider to do before/ after entering your house or when beginning the service as a precautionary measure to ensure hygiene?

25. Did an online platform reach out to you and communicate regarding the pandemic?
  - a. What did it address?
  - b. What was left unaddressed that you wish you got a response for?
26. Materials used for services
  - a. Have there been any changes in the materials that service providers are using post Covid?
    - i. If yes, what has changed?
  - b. Do the changes reassure you about the quality and hygiene of the service and service provider?
  - c. Has there been a change in the pricing of the services post-Covid-19?
    - i. What has changed and what remains unchanged?
    - ii. In what way does it affect your budget for beauty spending?
27. During this period, did you attempt DIY techniques to replace your beautician?
  - a. Why?
    - i. Hygiene
    - ii. Lack of availability of beauticians
    - iii. Cost saving
  - b. Were you aware of DIY techniques even before the lockdown?
  - c. If not, where did you learn the techniques from?
    - i. Friends and family
    - ii. Online tutorials
  - d. Were you sufficiently satisfied with the outcomes?
28. Do you intend to resume using beauty worker services at some point?
  - a. What might convince you to do so?

### **Experience with the service providers(s)**

29. Do you use your personal products while availing services?
  - a. Yes
  - b. If no, when do you rely on the materials brought by the service providers
30. Have you ever negotiated and bargained with the service provider? (Cost of service)
31. Selecting a service provider for a service
  - a. Are you able to choose which service provider will serve you when ordering services online?
  - b. What factors contribute to your selection?
  - c. If you have a specific service provider in mind based on your past experiences, are you able to specifically request her?
    - i. Yes
    - ii. If not, what do you do to maximise your chances of being assigned your preferred service provider?
  - d. Have you discussed contacting service providers outside the platform to provide you service?
    - i. No
    - ii. If yes, how have the service providers reacted to this?



32. Rating/feedback/tipping of service provider
  - a. What would prompt you to give a five-star rating to a service provider?
  - b. Have you ever given a beauty service provider a poor rating?
  - c. What would prompt you to give a poor rating?
  - d. Do you tip beauty service providers over and above what you have to pay?
  - e. Have your tipping patterns changed with the use of online services?
33. Conduct of the service provider
  - a. How do you deal with difficult service providers?
  - b. What do you do when they refuse to perform the services that you pay for?
34. Display of professionalism as promised by the online platform
  - a. Do you only seek service providers who have been formally certified/trained?
  - b. What does a professional service provider mean to you?
  - c. Do you see online service providers as being more professional than offline service providers?
35. Rating/feedback from service provider
  - a. Do you know you are being rated by the service providers?
  - b. Do you know on what basis you are being rated?
  - c. Do you know you can potentially be blacklisted from the platform?

## **Terms and conditions, Referrals**

36. Terms and conditions
  - a. Have you read the terms and conditions?
  - b. Are there aspects of the terms and conditions that you have not understood?
  - c. Have you ever made an effort to seek clarification on those aspects of the terms and conditions that you have not understood?
37. Have you recommended joining the online platform to a service provider you know?
38. Have you recommended the online platform to friends/family?
39. Any other information you wish to add?

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