THE GIG ECONOMY AND ITS EFFECTS ON RACIALIZED AND IMMIGRANT POPULATIONS IN TORONTO

March 2022

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About the ICE Committee

This report was commissioned by the Intergovernmental Committee for Economic and Labour Force Development (ICE). The ICE Committee was established in 1997 by officials in the Government of Canada, the Province of Ontario, and the City of Toronto. The committee's purpose is to coordinate the economic and labour force development activities of the three governments (and the various departments and ministries within each government) in Toronto.

ICE members are drawn from the departments and ministries involved with economic development and labour force development activities in Toronto at all three orders of government. Current ICE members include representatives from:

- City of Toronto: Economic Development & Culture; Employment & Social Services; and Social Development, Finance & Administration Divisions.

- Province of Ontario: Ministries of Education; Municipal Affairs; Citizenship & Immigration; Advanced Education & Skills Development; and Economic Development & Growth.

- Government of Canada: Immigration, Refugees & Citizenship Canada; Innovation, Science & Economic Development Canada; Employment & Social Development Canada; Service Canada; and FedDev Ontario.

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About MDB Insight

Founded in 2007, MDB Insight is Canada's leading workforce development, market research, and economic development strategic planning consultancy. MDB Insight provides workforce development plans and labour market intelligence that create real-world impact for our public and private sector clients. We have worked extensively with communities of all sizes as they struggle with the challenges of workforce development, talent alignment, attraction and retention, and talent development.

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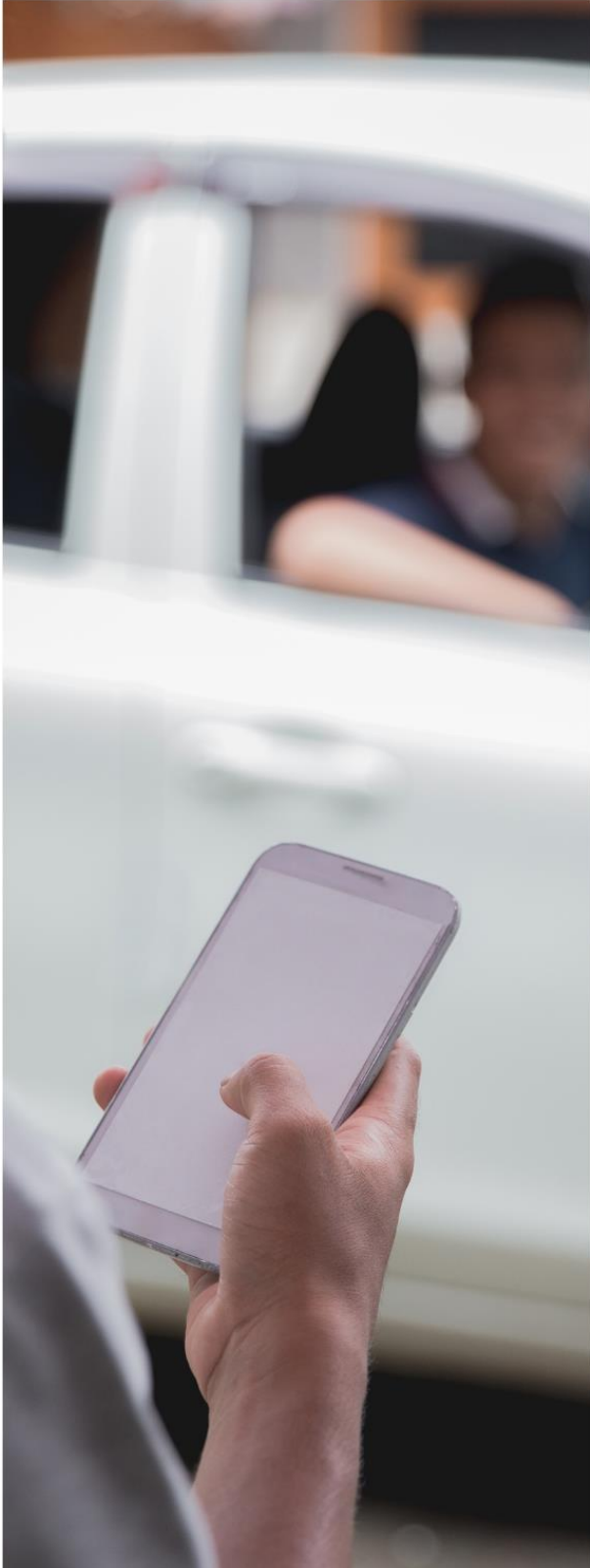
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EXECUTIVE SUMMARY

The gig economy is an integral part of the mainstream economy today and includes various contingent work arrangements and occupations across all skill levels. It comprises major industry sectors, such as information and cultural industries, finance and insurance, real estate, professional, scientific, technical, educational, and accommodation and food services. However, the nature and composition of the gig economy are still largely unknown. More importantly, there is a lack of information on effectively measuring the gig economy, long-term effects of gig work in an unregulated environment and impacts on marginalized groups. This research report aims to inform the future direction of the gig economy and its effects on racialized and immigrant populations in Toronto.

In December 2019, Statistics Canada published the first Canadian study that systematically identified gig workers in Canada based on Canadian administrative sources, including individual and corporate income tax returns. However, there is continued speculation about the number of gig workers and the disproportionate participation of marginalized populations, including women, racialized Canadians, youth, newcomers, immigrants, seniors, Indigenous Peoples, and low-income earners. The effect of this disproportionate participation is also largely unknown. Thus, the issues surrounding gig work become particularly relevant in Canada's largest and most culturally diverse city, Toronto.

The Intergovernmental Committee for Economic and Labour Force Development (ICE Committee) commissioned this contract research project. ICE Committee contracted MDB Insight to take stock of the gig economy in Toronto, understand how it disproportionately affects different groups and identify the long-term effects of gig work in an unregulated environment. The research serves as a guide to inform future studies and methodologies for measuring the gig economy.

Research Background and Rationale

Gig work has been on the rise, driven by several interconnected factors, including the recession of the late 2000s and early 2010s, partly due to the fall of labour unions, restructuring of traditional industries and the move to service-related jobs. Many experienced workers and young graduates were seeking employment in a constrained labour market. This, along with the adoption of digital technology, and the rise of millennial skills, stimulated further growth and new ways to deliver goods and services while adopting the ability to pay through online portals, such as PayPal and direct deposits from bank accounts. The non-regulated environment has been favourable for gig work and growth.

The COVID-19 pandemic has compounded the impacts on non-regulated gig work. Any worker whose income was less than the minimum qualification amount of $5,000 were not eligible to receive the Canada Emergency Response Benefit (CERB) in 2020. As per available data, in 2016 the minimum income for gig works was $4,303. Due to this ineligibility, these gig workers would be more likely to face financial hardship, and more so if this was their sole source of income. Funds generated through cash gigs and perhaps not declared to the Canada Revenue Agency (CRA) were also excluded from the minimum qualification amount. Furthermore, since gig workers are often public-facing service providers, they were more at risk of contracting COVID-19—and more likely to lose their jobs during the shutdown, than those who were able to work from home.

Research Objectives

The primary objectives of the research project were to:

- Develop a definition of the gig economy and gather information on the size and structure of the gig economy in Toronto;

- Lay a foundation of what the gig economy looks like in Toronto;

- Identify if and which groups (women, racialized Canadians, youth, newcomers, immigrants, seniors, Indigenous Peoples, and low-income earners) are disproportionately impacted;

- Understand the long-term effects of gig work in an unregulated environment; and

- Inform future directions on measuring the gig economy in Canada.

Gig Economy Definition

The gig economy is an integral part of the economic system. It represents the self-employed and non-standard workforce providing payment-by-task services to consumers through digital platforms and gig companies. While the self-employed gig worker provides services directly to the consumer, the non-standard gig worker enters into formal agreements with gig companies to provide services to the company's clients.

Key characteristics of the gig economy include:

- Part-time, temporary, short-term, and flexible working arrangements.
- The segmented economy in that some gig work is highly flexible, offers higher income and is often held by advantaged groups. These types of gigs could be performed on a supplemental basis. Other gig work is low income, multiple jobs by one person, offers less control and involves disadvantaged groups, who often rely on it for their primary livelihood.
- Work in the gig economy is often precarious as it relates to job security, benefits, and income.
- Gig workers include freelancers, consultants, dependent and independent contractors, professionals, and technical service personnel. Some examples of gig work include ride-hailing and delivery, creatives (artists, writers etc.), temp-agency workers, handyman services, programming, coding, and part-time teaching.

Strategic Recommendations

Emerging through this research are a series of four strategic directions, each offering tangible and actionable recommendations. They enable the positive aspects of the gig economy to flourish while addressing the drawbacks of working in the sector, including gaps in policy and the impacts on disadvantaged workers and communities. In total, 20 actions are proposed for pursuit by those best positioned for implementation. The actions are directed at policymakers and researchers involved in workforce development including the City of Toronto, the Provincial and Federal governments and thought leaders and educational institutions.

- **Strategic Direction 1:** Adopt a standard definition to describe Toronto's gig economy
- **Strategic Direction 2:** Focus workforce development efforts to support gig worker priorities
- **Strategic Direction 3:** Focus research to continually inform and measure the economy
- **Strategic Direction 4:** Continue to track policy progress in the economy

Section 1

Project Methodology

MDB Insight developed a detailed methodology to achieve the research objectives, further refined in discussion with the ICE Advisory Committee. The process for the research report is described below.

Phase 1	Phase 2	Phase 3
Project Initiation	Engagement Readiness and Implementation	Reporting & Recommendations
(August - October 2021)	(October2021– January 2022)	(March 2022)

Phase 1 – Jurisdictional Review and Summary Report: A central part of the Phase 1 research was a desktop review of best practices that define the gig economy and existing regulations and strategies that address diverse and marginalized communities within this economy. A detailed environmental scan was conducted, considering the context, experience, and outcomes across various other jurisdictions of relevance to Toronto. This phase enabled recommendations to be made using the lessons learned and best practices from these other jurisdictions (focusing on protections for gig workers).

At the heart of this research project, which launched in August 2021, was the Engagement Readiness and Implementation phase, which included interviews with key stakeholders and a panel survey of gig workers.

Phase 2A – Stakeholder Interviews: One-on-one interviews were conducted with gig workers, employers and organizations, knowledge holders and gig experts, including the Canadian Freelance Union, Workers Action Centre, University of Toronto, Ryerson University, State University of New York at Buffalo and the University of Strathclyde, Glasgow. While more than twenty stakeholders were contacted, eight agreed to be interviewed. Their insights are summarized in Section 3 and correlate with existing research.

Phase 2B – Panel Survey of gig workers: A comprehensive survey was the foundation for this research, as it gained input from a representative sample of gig workers with access to online survey (or panel) technology in Toronto. Approximately 163 gig workers from Toronto provided input on satisfaction rates, challenges and opportunities in the gig economy and decisions which influenced their participation in the economy. The survey also provided critical information on the demographic and socio-economic profile of the gig economy workers. Although the survey participants were online panelists, representative of the general Toronto population by age and gender, any populations not included among the directory of panelists (e.g., those who may not have access to online technologies) would be underrepresented in the final sample. Targeted outreach to interview these groups required a different survey methodology and was beyond this project's scope. The survey results are provided in Appendix A.

Phase 3 – Reporting & Recommendations: This report, titled *The Gig Economy and its Effects on Racialized and Immigrant Populations in Toronto*, summarizes the research and analysis undertaken to inform future research on the gig economy.

Section 2

Context: The Role and Impact of the Gig Economy

The gig economy is not just a buzzword anymore; it is a growing part of the modern labour market. While the gig economy is positive in terms of its flexibility, there is little data or information to quantify impacts and benefits accurately. This section highlights the largest components of the gig economy, the impact of the economy on racialized and immigrant populations, the effects of working in an unregulated environment, and the role COVID-19 played. A detailed description of these considerations is provided in Jurisdictional Review and Summary Report (provided as a separate report).

Components of the Gig Economy

The gig economy is made up of three major components namely,

- Gig workers

- Consumers who need a specific service

- Companies that connect the worker to the consumer in a direct manner

Impact on Disadvantaged Groups

Evidence suggests that not all workers within the gig economy participate out of a free will, with many forced to join out of necessity.[1] Participation in informal activities is higher in provinces where unemployment rates are above pre-crisis averages and have weaker wage growth.[2] The International Labour Organization (ILO) identifies that vulnerable employment, including freelancer work, is closely linked to precarity. As defined by the ILO (2011: 5), '*precarious job is usually defined by uncertainty as to the duration of employment, multiple possible employers or a disguised or ambiguous employment relationship, a lack of access to social protection and benefits usually associated with employment, low pay, and substantial legal and practical obstacles to joining a trade union and bargaining collectively*'.[3]

From a discrimination perspective, research suggests that the gig economy promotes inequality. Discrimination does not only occur when firms hire employees, as bias towards certain population groups can be unintentionally built into the algorithms that power the gig economy platforms. For example, some gig economy platforms require consumers to choose individual service providers instead of allocating to them. This environment facilitates consumers to unconsciously discriminate against gig workers, with the problem further compounded in reviews. Reviews serve as an important trust establishment metric within the gig economy and determine where gig workers rank in user searches. A study conducted on Online Freelance Marketplaces,[4] found evidence of bias, as perceived gender and race significantly correlated with worker evaluations. This bias could harm the employment opportunities afforded to the workers. Workers perceived to be Black receive fewer reviews than

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[1] Kostyshyna, O., & Luu, C. (2019). The Size and Characteristics of Informal ("Gig") Work in Canada.
[2] Ibid.
[3] Woodcock, J. (2019). "The Impact of the Gig Economy." In Work in the Age of Data. Madrid: BBVA, 2019.
[4] Hannak, Wagner, Garcia, Strohmaier, Wilson, Bias in Online Freelance Marketplaces: Evidence from TaskRabbit

workers perceived to be White, especially so in the case of men. Furthermore, being female was found to be a disadvantage.

Structural gender disparities also impact earnings potential for gig economy workers. Research suggests that female Uber drivers within the United States earn 34% less than their male counterparts. Although users cannot select a driver, a study finds that as women are disproportionally responsible for the household and child-related caring responsibilities, they are limited to earning lower wage opportunities. For example, Uber's surge fare pricing often occurs late at night within drinking hot spots, contributing to an expansion in the gender pay gap within the gig economy.[5]

Recent research conducted through the lens of Uber and its drivers shows that while flexibility is an important motivation to join the economy, most workers consulted as part of the work report higher levels of anxiety.[6] A high proportion of these drivers come from economically disadvantaged backgrounds and are often marginalized in the labour market. They tend to remain at the lower end of the income distribution.

COVID-19 and the Gig Economy
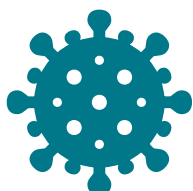
COVID-19 has disproportionately impacted gig economy workers. In May 2020, unemployment rose in Canada to a staggering 11.5%. Toronto's unemployment rate was 11.2%.[7] While employment declined by 17.8% among all paid employees, vulnerable workers saw the greatest losses as employment losses were above average among employees with a temporary job at 30.2%.[8]

Furthermore, the pandemic pushed many companies and corporations to close, further magnifying existing risks of gig work, including insecure job opportunities. Many full-time workers who lost employment during the pandemic have shifted to on-demand gig work due to increased lifestyle appeal or necessity, which has increased the supply of labour. The pandemic highlighted the lack of social support for gig workers. It shows the need for firms and governments to improve working conditions, compensation, and worker legislation to protect gig workers and restructure how society and governments view essential work.[9,10] The precarious work conditions of food couriers worsened during the pandemic, including issues of underpayment or non-payment of base pay and tips. Although delivery workers are considered essential workers, they lack basic safeguards and sanitary conditions at work.[11]

The financial impact was highly variable depending on their ability to access other income sources. For example, pension age gig workers saw less financial impact due to receiving pension benefits.

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[5] Cook, C., Diamond, R., Hall, J. V., List, J. A., & Oyer, P. (2021). The gender earnings gap in the gig economy: Evidence from over a million rideshare drivers. The Review of Economic Studies, 88(5), 2210-2238.

[6] Chen, M. & Rossi, Peter & Oehlsen, Emily. (2017). The Value of Flexible Work: Evidence from Uber Drivers. SSRN Electronic Journal. 10.2139/ssrn.2952556.

[7] Statistics Canada. Labour Force Survey, April 2020. Source: https://www150.statcan.gc.ca/n1/daily-quotidien/200508/dq200508a-eng.htm

[8] ibid

[9] Statistics Canada, The impact of COVID-19 on the gig economy: Short- and long-term concerns, May 2020.

[10] As per the Public Safety Canada, services and functions are considered essential to preserving life, health, and basic societal functioning. These include, but are not limited to, the functions performed by first responders, health care workers, critical infrastructure workers (e.g., hydro, and natural gas), and workers who are essential to supply critical goods such as food and medicines. Source: https://www.publicsafety.gc.ca/cnt/ntnl-scrt/crtcl-nfrstrctr/esf-sfe-en.aspx

[11] Wolf, A. (2021). Essential But Unprotected: App-based Food Couriers in New York City. Cornell University's ILR School.

Conversely, about half of gig workers classified as self-employed were ineligible for Employment Insurance (E.I.) and Canada Emergency Response Benefits (CERB) of $500 a week.[12] As per available data, in 2016 the minimum income for gig works was $4,303. Due to this ineligibility, these gig workers would be more likely to face financial hardship, and more so if this was their sole source of income. Funds generated through cash gigs and perhaps not declared to the Canada Revenue Agency were also excluded from the minimum qualification amount.

From a consumer perspective, the pandemic resulted in a surge in demand for gig economy workers due partly to the increased reliance on gig workers to home deliver necessities. For example, research from Statistics Canada found that retail e-commerce sales reached a record high in December 2020, increasing by over two-thirds (+69.3%) year-over-year to $4.7 billion.[13] Within the food delivery sector – a sector dominated by gig workers – research by McKinsey estimates that the food delivery markets has more than tripled since 2017, valued at more than $150 billion.

Regulating the Gig Economy

The growing trend towards recognizing gig workers as dependant contractors has implications across Canada. Within many provinces, dependent contractors have the same right to unionize under labour laws as employees do.

Policymakers in many nations are trying to reform the gig economy. However, the economy is rapidly growing, aided by the permanence of platform-based gig work. Thus, policies and regulations often lag and are several steps behind.

The platform economy, described as any digital platform that uses the internet to connect dispersed networks of individuals to facilitate digital interactions between people,[14] has seen the strongest regulations in Europe. For example, the European Union directive is key to improving and clarifying working conditions on platforms.[15] However, governments are often dogged by corporate resistance and loopholes. For instance, in response to Spain's 2021 'Rider Law' recategorizing platform workers as employees entitled to protections, companies have tried to change their operating models so that the law does not fully apply.[16]

Uber's Flexible Work+ proposal urges governments to renew outdated labour laws to protect gig economy workers in Canada. It includes two components, namely, "self-directed benefits" and enhanced worker protections, described vaguely as "training and tools". However, there has been broad scepticism about Uber's proposal as gig workers would be excluded from minimum employment

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[12] Statistics Canada, The impact of COVID-19 on the gig economy: Short- and long-term concerns, May 2020.

[13] Statistics Canada, Retail trade, December 2020. Source: https://www150.statcan.gc.ca/n1/en/daily-quotidien/210219/dq210219a-eng.pdf?st=Vj6QuvQt

[14] What is the future of work? - The rise of the platform economy. Deloitte. (n.d.). Retrieved April 1, 2022, from https://www2.deloitte.com/content/dam/Deloitte/nl/Documents/humancapital/deloitte-nl-hc-what-is-the-future-of-work.pdf

[15] Commission proposals to improve the working conditions of people working through digital labour platforms. European Commission - European Commission. (n.d.). Retrieved April 1, 2022, from https://ec.europa.eu/commission/presscorner/detail/en/ip_21_6605

[16] Ro, C. (2022). Why gig work is so hard to regulate. BBC Worklife. Retrieved April 1, 2022, from https://www.bbc.com/worklife/article/20220308-why-gig-work-is-so-hard-to-regulate

standards, Canada Pension Plan contributions and Employment Insurance.[17]

Canadian labour laws are being reviewed and updated in response to the shifting nature of work and the gig economy. For example, the proposed Ontario Gig Workers' Bill of Rights,[18] endorsed by Gig Workers United (CUPW), Uber Drivers United (UFCW), and the Ontario Federation of Labour should be examined. It outlines minimum rights that governments must guarantee fairness and non-discriminatory treatment for gig workers. In 2019, the federal government installed an independent expert panel on Modern Federal Labour Standards to examine issues related to the changing nature of work, including federal minimum wage, labour standards protections, access and portability of benefits and support for non-unionized workers.[19] The Ontario Workforce Recovery Advisory Committee (OWRAC) recommendations will be critical in determining Ontario's future of labour laws.[20]

Measuring the Gig Economy

As per Statistics Canada, self-employed temporary workers now constitute more than 22% of the labour force and are the fastest-growing labour group in Canada.[21] Gig work grew significantly among the self-employed, increasing from 5.5% to 8.2% from 2005 to 2016.[22] This growth rate is higher than the rate of growth in self-employment overall.[23]

A 2018 survey of the digital economy within Canada found that 28% of Canadians aged 18 years or older were making money via online platforms, amounting to $4.9 billion in earnings, or an average of $722 per person.[24] Earnings were most commonly by selling new or used products and platforms used, including Kijiji, eBay, and Etsy. Other freelance platforms such as YouTube, ridesharing or Fiveer also have seen sustained growth.

Existing measures to quantify the Canadian gig economy by Statistics Canada are based on administrative data identifying gig workers based on the characteristics of their work arrangements and how these are reported in tax data.[25] Data shows that gig workers, including self-employed freelancers, on-demand online workers and day labourers, represented about 8% to 10% of all Canadian workers in 2016. They were equally split between those who did gig work to supplement their wage employment and those who did not earn any wages or salaries and therefore relied primarily on their gig earnings.[26]

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[17] Thompson, M., Thompson, M., Hudson, M., Corbyn, J., Day, M., Stipe, M., Press, A. N., Marx, P., & Carbonell, J. S. (n.d.). Uber's flexible work+ campaign is a scam to evade Canada's labor laws. Jacobin. Retrieved April 13, 2022, from https://www.jacobinmag.com/2021/03/uber-flexible-work-plus-canada-labor-law-workers-rights

[18] https://ofl.ca/action/gig-workers/

[19] Report of the Expert Panel on Modern Federal Labour Standards. (2019). Employment and Social Development Canada. Source: https://www.canada.ca/en/employment-social-development/corporate/portfolio/labour/programs/labour-standards/reports/what-we-heard-expert-panel-modern-federal.html

[20] The Future of Work in Ontario. (November 2021). Findings and recommendations from the Ontario Workforce Recovery Advisory Committee. Source: https://files.ontario.ca/books/mltsd-owrac-future-of-work-in-ontario-november-2021-en-2021-12-09.pdf

[21] Understanding the nature and experience of gig work in Canada. (July 2020). Future Skills Centre • Centre des Compétences futures. Retrieved April 1, 2022, from https://fsc-ccf.ca/research/understanding-the-nature-and-experience-of-gig-work-in-canada/

[22] Ibid.

[23] Ibid.

[24] Ibid.

[25] Jeon, S.-H., Liu, H., & Ostrovsky, Y. (2019, December 16). Measuring the Gig Economy in Canada Using Administrative Data. Analytical Studies Branch Research Paper Series. Retrieved April 8, 2022, from https://www150.statcan.gc.ca/n1/pub/11f0019m/11f0019m2019025-eng.htm

[26] Ibid.

Growth within the gig economy is not equally distributed across all industry sectors or by sex. For example, industries such as Professional, Scientific and Technical Services (PSTS) account for nearly one-fifth of gig economy workers, estimated at 19.0% for males and 17.4% for females.[27] With the advent of COVID-19, workers within sectors such as PSTS were more able to continue operating remotely. In contrast, gig workers within the arts and entertainment faced high barriers to continuing work. These discrepancies illustrate the complexities of regulating the gig economy.

One of the most prevalent questions facing policymakers is understanding the gig economy's current size and forecasted growth. The sector grew substantially in the early 2000s, alongside the adoption of digital platforms. Long-term trends will need to be monitored to see if the ongoing implications of COVID-19 will see a similar or greater influx of gig workers. At the same time, a national standard definition of gig economy workers must be agreed upon to ensure future data analysis of the gig economy is consistent and accurate to inform better decision-making.[28]

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[27] Ibid.

[28] Understanding the nature and experience of gig work in Canada. (July 2020). Future Skills Centre • Centre des Compétences futures. Retrieved April 1, 2022, from https://fsc-ccf.ca/research/understanding-the-nature-and-experience-of-gig-work-in-canada/

Policy Considerations from Other Jurisdictions for Toronto's Gig Economy

In California, Proposition 22 replaced Assembly Bill 5 to allow gig workers to work on their preferred schedule as independent contractors. Opponents point out that gig workers are denied the right to be employees, including all the benefits and protections offered under state labour law.

Large gig economy employers such as Uber, DoorDash, Lyft, Instacart and PostMates contributed over $200 Million collectively to the "Yes on Proposition 22" campaign and threats to leave the state. This showcases the influence large players can have on policy.

New York City Council's new bills to support gig workers include policies relevant to app-based food delivery workers.

Labour groups are worried the bills will be seen as a victory for gig workers when they set a minimum standard for better working conditions.

Opportunities exist to go beyond gig workers in the food delivery and focus on other industries within the economy.

In the United Kingdom in February 2021, the Supreme Court ruled that drivers for gig economy employers such as Uber were "workers" and not independent contractors.

The hybrid classification offers fewer job rights than employees but more benefits and protections than independent contractors.

The requirement to provide benefits pushes gig economy companies to work together to support gig workers. For example, Uber called on competitors to create a cross-industry pension scheme.

Australia has adopted a national definition of the gig economy, including ridesharing, delivery, and personal services. Clear descriptions and short videos are available on their website to communicate this definition.[29]

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[29] https://www.fairwork.gov.au/find-help-for/independent-contractors/gig-economy?fbclid=IwAR2y9-nHCPwrwDER3z5K5j7tCHx0lLAmxKRiP4roFw4HPWY1S0hPase0UYk

Relevance for Toronto

A general trend among the reviewed jurisdictions was the larger proportion of gig workers that come from marginalized or racialized populations. This is important to note when considering the individuals most impacted by policy developments related to the gig economy. This is particularly the case for relatively low-barrier-to-entry jobs often offered by app-based services like Uber and Skip the Dishes.

Communities like Toronto are impacted by the influence that large gig employers can have on public policy. The effects of drastic policy changes were felt in 2020 when the Ontario Labour Relations Board ruled that Foodora couriers are dependent contractors of the food-delivery company in the Canadian Union of Postal Workers v. Foodora Inc. court case. This represented a major legal victory as workers now had greater protections under the law and had the right to unionize. Although, a few months following this legal win, Foodora left the Canadian market due to this development. Fears of losing large employers and their jobs have impacted policy decision-making in jurisdictions like California and New York, where there is a feeling that more needs to be done for gig workers.
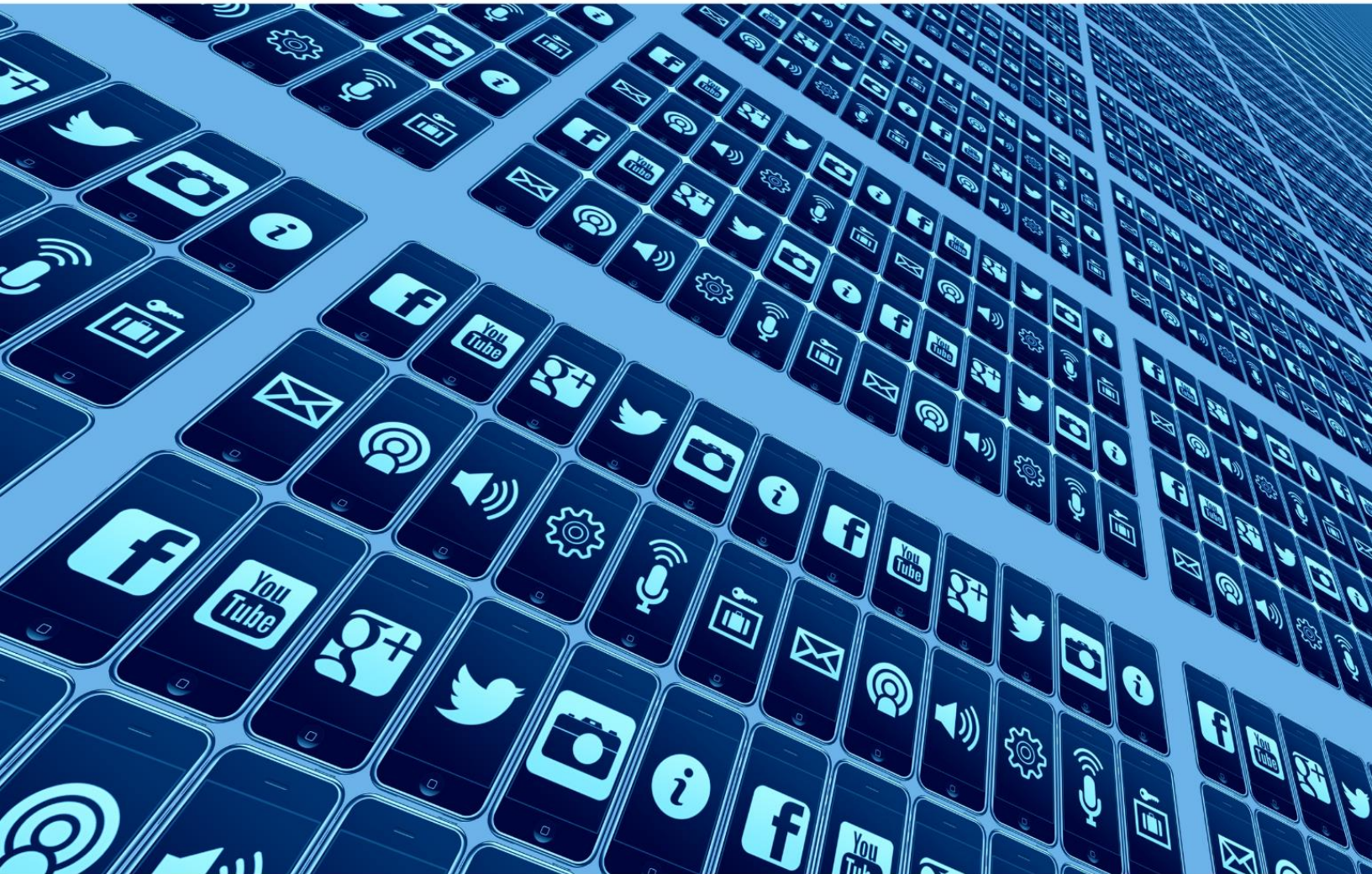
Toronto should also look at jurisdictions like Australia that have developed a clearer definition of gig economy workers. The United Kingdom provides an example of a new legal classification for gig workers that has fewer protections when compared to an employee but more than independent contractors.

Section 3

Consultation Insights

As outlined in Section 1, a robust consultation program was developed to understand the perspectives of gig workers, organizations, and knowledge holders firsthand. Targeted stakeholder interviews and a gig worker panel survey provided input on a working definition of the gig economy, laid a foundation of what the gig economy looks like in Toronto and informed future directions on measuring the gig economy in Canada. The insights gleaned from each of these processes is detailed below.

Stakeholder Interview Summary

One-on-one interviews were conducted to delve deeper into the findings of the research. The interviews are not meant to be representative of the general population but instead allow for deeper conversations with local key stakeholders to understand the real and perceived impacts of the gig economy. Stakeholders consulted through the process included gig workers, employers and organizations, knowledge holders and gig experts, including the Canadian Freelance Union, Workers Action Centre, University of Toronto, Ryerson University, the State University of New York at Buffalo and the University of Strathclyde, Glasgow.

An interview guide was developed with questions focused on gaining a clear description of the gig economy and included:

- When you think about the gig economy, what words would you use to define it? Who is included, who isn't?

- What would you say are the greatest benefits to working in the gig economy? What do you see as disadvantages to working in the gig economy?

- What are the top three issues facing gig workers? In your opinion, what should be done to address these issues?

- What specific issues exist for marginalized populations in the gig economy? For example, issues related to gender, racialized Canadians, youth, newcomers, immigrants, seniors, Indigenous Peoples, and low-income earners.

- What is the level of interaction or working relationship with gig workers contracted to carry out specific tasks?

- Are there any benefits or protections you believe should be provided to gig workers?

- How has technology supported/impeded the ability to work as a gig worker?

The feedback received from stakeholders involved with the gig economy is summarized below.

Perspectives on the definition of Gig Economy

The following gig economy definition was tested through interviews with stakeholders.

"The GIG economy is generally described as people working as Freelancers, Consultants, Independent Contractors and Professionals and temporary contract workers. Working in the GIG economy can be a primary source of income or could also be in addition to other work as supplementary income. Some examples of GIG economy work could include, Artists, online handyman services, driving for Uber or LYFT, delivering food, writing programming code or freelance articles, as well as part-time teaching "

Stakeholders mentioned that this working definition resonated with them and provided additional input for consideration. One respondent mentioned that while the definition reflects a popular understanding of gig work, it could be made simpler by focusing on gig work consisting of short, fixed-term employment for a specific job with autonomy and direct connection with the workers' clients. It was noted that large gig employers like Uber could add complexity to the definition, given that the contract is not between drivers and their clients but rather between drivers and Uber. Others felt there needs to be a consideration around dependent contractors (i.e., those selling or providing services to only one company/employer).

Gig Worker Advantages and Challenges

The advantages mentioned included gig workers' flexibility relative to most employees: flexible work hours, work schedule, fees/payments, and work location. Gig workers also benefit from picking and choosing their projects, which are often short-term and leave time left over for non-work-related priorities. Some mentioned that gig work ensures workers do not lose their creative spark or experience the monotony of full-time, routine work.

Disadvantages included an often lack of job security, stability and benefits and a further swing of the pendulum from employee to employer related to power balance. These workers are often more dependent on the company assigning gig work contracts to meet financial ends. This is particularly notable because most gig workers do not have employment benefits such as sick days. This often causes additional stress for workers, especially when workers must compete for a limited number of contracts. There is also a lack of consistency in terms of work and the type of jobs available, and it can also be challenging to assess the quality of work environments. This all links to the lack of established workers' rights and employers' focus on saving labour costs. Indirect challenges also need to be considered, such as the difficulty for gig workers to apply for loans or other forms of financial products due to a lack of formal and consistent income.

Equity and Inclusion Considerations

Stakeholders mentioned seeing a strong increase in immigrants, young people, and vulnerable and racial populations going into low-paying gig work, often due to the lower barriers to entry relative to other occupations. While initially intending to temporarily work in the gig economy to obtain work experience and income, many workers often feel trapped in a loop. These workers often do not see the hidden costs that can cause them to barely break even. For example, Uber drivers must consider wear and tear on

their car, fluctuating gas prices and potentially hiring an accountant to file business taxes since they are not considered employees. In addition to facing challenges related to low wages and a lack of benefits, workers from marginalized populations face additional concerns related to job stability caused by the rating system on many app-based gigs. These are often strict, requiring a high customer rating to continue working with a company, leaving space for a series of bad reviews from discriminating customers to cause a gig worker to lose their job.

It was noted that gig employers sometimes take advantage of undocumented workers by paying them low wages and threatening deportation to whistle-blowers. Hiring and on-the-job discrimination and harassment can also exist in the gig economy. One stakeholder referenced an example of a Toronto-based luxury hotel that hired gig workers through a contracting company instead of hiring regular employees. This opened the door for discrimination by offering higher-paying, customer-facing roles to workers that "fit the look" the luxury hotel was after. With fewer employment protections, BIPOC (Black, Indigenous, and people of colour), disabled and larger workers (often if they were women) were fired or given fewer desirable roles.

Technology and the Gig Economy

Stakeholders identified that technology has supported and driven the gig economy's growth. Food-delivery, ride-sharing and freelance platforms have enabled access to flexible work opportunities and earning income. Skilled workers who want to work from home and need increased flexibility also turn to the gig economy. Stakeholders mentioned that women with small children are more likely to require technology's increased flexibility in many gig roles.

Gig workers indicate that technology has eased access to the customer base, products, and services. Digital knowledge is considered essential to growing the customer base. Thus, any digital skills gap affects the ability of workers to participate in this economy. Technology is also the necessary medium to connect to employers and customers. Employee-employer relationships have changed, with many interactions occurring online or through apps. Uber, for example, uses an algorithm through the app to assign workers' wages and measure performance through ratings.

Perspectives on Employee Benefits for Gig Workers

Stakeholders acknowledged the relative flexibility that gig workers may have compared to traditional employees. There is a desire to have similar benefits as employees and control over work, work conditions, and wages (i.e., how much they charge for their services). Benefits include medical insurance (health, dental, vision), retirement, life insurance, sick days, and paid time off. There was a general sentiment that more traditional employment standards should cover gig work. One stakeholder referenced the Netherlands and how they have legislated benefits for all workers, including part-time workers who get a total amount of benefits based on hours worked. Building the ecosystem of opportunities for gig workers through associations, networking, student support, gig events, and mentorship was also highlighted. It should be noted that unions, including the Alliance of Canadian Cinema, Television and Radio Artists (ACTRA), provide protections to member gig workers. On the other hand, workers who do not have membership may not enjoy the same benefits.

Advantages and Challenges for Gig Employers

Advantages for gig employers include access to skilled talent on a contract that supports business risk mitigation and cost savings. Gig talent is recruited for a specific task, so employers do not have to worry about ongoing payroll and finding work for employees. Many gig employers also benefit from not having to pay employee benefits such as paid vacation, retirement plans and sick days. Depending on the contractual arrangement, many gig employers' benefit from tax obligations passed onto the worker.

A gig employer's challenges can differ depending on their industry and the employer-worker arrangement. For example, large app-based employers such as Uber and Lyft are continuously having to spend money lobbying the government to avoid additional regulation. These employers also continued to see pressure from workers for better working conditions and increased compensation. The prospect of unionization is also a concern for employers currently benefiting from lower-cost labour. Foodora is an example of a gig employer that left the Canadian market after workers were able to unionize.

On the other hand, a company hiring a programmer will have different challenges, such as increased competition for labour and upward pressures on wages. Gig employers hiring on a task-by-task basis may struggle to retain workers who are putting up with less even if increased compensation is offered. Many gig employers run on venture capital which can be impacted if profits drop due to some previously mentioned challenges.

Stakeholder interview insights highlight the need for policymakers to carefully analyze plans proposed by the lobbying of large gig economy employers. Blanket changes in legislation are unlikely to address individual sector and worker needs adequately. In-depth consultation with specific industry bodies is needed before policymakers can enact meaningful change.

Survey Findings: Who's included in Toronto's Gig Economy?

The gig worker survey was conducted using an online panel methodology to gather a representative sample of gig workers in Toronto. The respondents represented a wide range of demographic and socio-economic groups. The methodology resulted in a total of 163 responses. The survey provided critical information on the demographic and socio-economic profile of the gig economy workers, outlined in the figure below. Although the survey participants were online panelists, representative of the general Toronto population by age and gender, any populations not included among the directory of panelists (e.g., those who may not have access to online technologies) would be underrepresented in the final sample. Targeted outreach to interview these groups required a different survey methodology and was beyond this project's scope.

Age

18-39 (n=53)	33%
40-59 (n=46)	28%
60+ (n=32)	20%

Born in Canada

| Yes (n=107) | 67% |
| No (n=53) | 33% |

Indigenous

| Yes (n=8) | 5% |
| No (n=154) | 95% |

Gender

| Woman (n=77) | 48% |
| Man (n=85) | 52% |

Race Category

White	South Asian or Indo-Caribbean	East Asian	Black	Southeast Asian	Arab, Middle Eastern or West Asian	First Nations, Inuit or Métis	Latin American
50%	19%	12%	7%	6%	5%	4%	1%

Household Income

<$50k (n=29)	19%
$50-$100k (n=78)	51%
>$100k (n=47)	31%

Highest Education

| Post-Secondary (n=134) | 85% |
| No Post Secondary (n=24) | 15% |

Education in Canada?

| Yes (n=134) | 86% |
| No (n=21) | 14% |
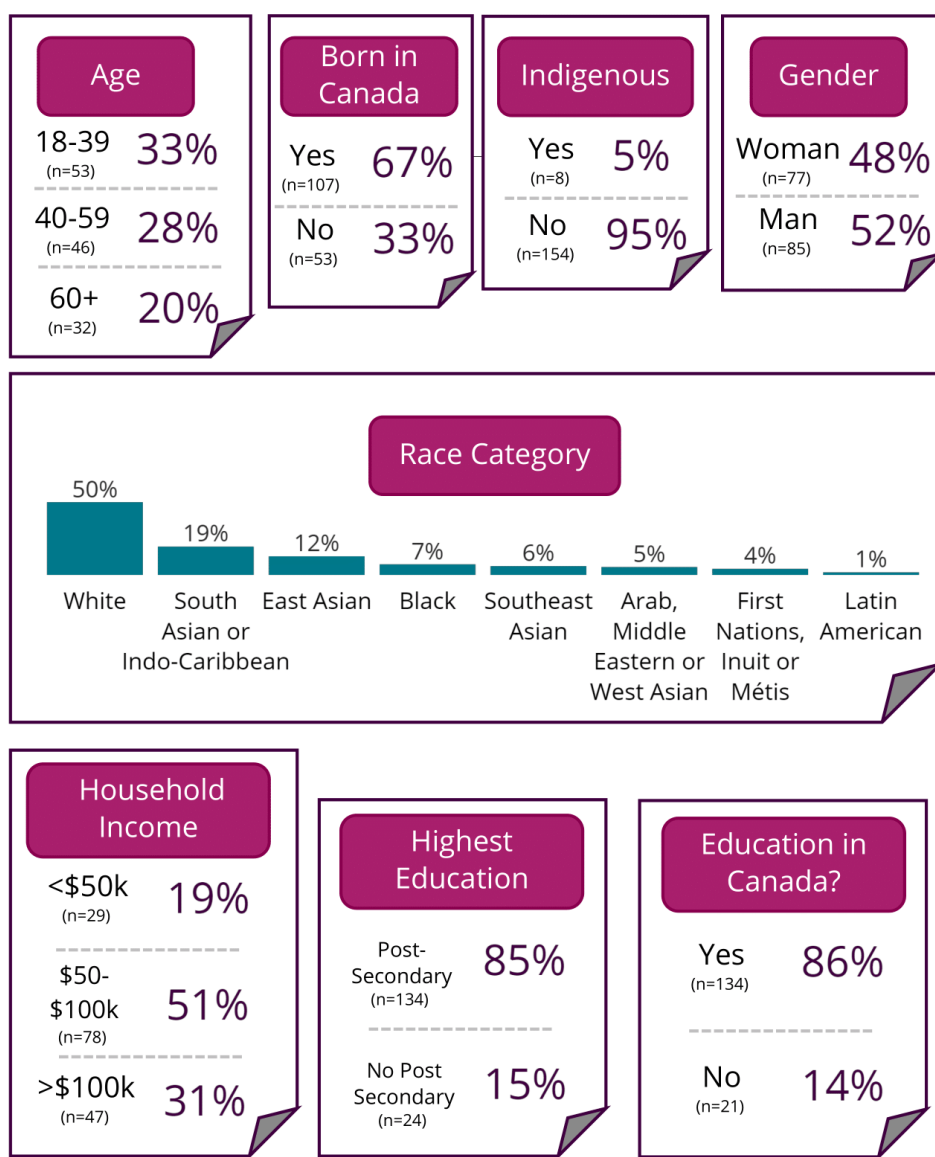
Current State of Toronto's Gig Economy

The survey described in the previous section focused on understanding satisfaction rates, challenges and opportunities in the gig economy and decisions which influenced their participation in the economy. The details of the survey and the results from each question serve as Appendix A to the report. Below are some key findings about the current state of Toronto's gig economy from the results of the survey:

Wide-ranging types of work and work arrangements – Respondents reported working in various capacities in the gig economy in terms of their work arrangements and the amount of time spent per week working. While many individuals reported providing services to only one company, 3% of the sample reported working at more than 10. Respondents also represented several sub-industries of the gig economy, including food delivery, home based-computer work, office work, data entry, service-related occupations, and others.

High levels of moderate satisfaction – Among the respondents to the survey, 91% reported being highly satisfied or somewhat satisfied working in the gig economy. While this is a positive result collectively, the majority of those (55% of the total sample) fell into the somewhat satisfied category, suggesting that they are currently participating in the gig economy despite some negative experiences or views of their work.

Key benefits of work in the gig economy – The respondents rated their satisfaction levels with various aspects of their work in the gig economy. The four factors with the highest amount of satisfaction among respondents were: the ability to control the amount of work, work/life balance, flexibility of schedule, and flexibility of work arrangements. Further, in their responses to an open-ended question, 59% of respondents mentioned freedom/flexibility to choose their schedule as a top-of-mind benefit of work in the gig economy. 20% mentioned that it is a source of extra income. Extra income, gaining experience, and lay-offs due to COVID were the top reasons chosen as significant factors in respondents choosing to enter the gig economy.

Key challenges and priorities in the gig economy – Respondents were asked to rate their satisfaction with various aspects of work in the gig economy. Priorities were established based on the ratings of these aspects and how important each aspect was to respondents' overall ratings of satisfaction with work in the gig economy. Based on this analysis, the top priorities for improvement among gig workers were access to sick pay, job security, health insurance, and career growth opportunities. In responses to an open-ended question about the challenges in the gig economy, lack of stability/consistency was one of the most-mentioned themes, followed by customer issues and the impacts on free time.

Evidence of discrimination in the gig economy – Almost half of the respondents self-identified as members of a marginalized population. Among these respondents, 14% reported issues related to discrimination towards marginalized populations in the gig economy that they had experienced. The issues mentioned include race/ethnic origin discrimination, sexism/gender-based discrimination, and discrimination based on disability status and mental health.

Section 4

Strategic Directions and Recommendations

The findings of this research project support the premise that the gig economy is and will continue to be a key economic driver for the city of Toronto. The gig economy, aided by the rapid adoption of digital technologies, is rapidly reshaping the world of work. It frames major industry sectors, contributes to firm growth, creates jobs, and is sought after by workers for flexibility and autonomy.

Given the potential of the gig economy, there is a need for concerted efforts to address inherent challenges and strengthen its value proposition. This includes recognizing the sector as a central part of the economy, addressing barriers to opportunity and precarious employment, and reviewing policies and approaches to promote employment equity and social mobility.

Any discussion on advancing workforce development will be incomplete if the nature and composition of the gig economy workers are not fully recognized and accurately quantified. Workers in the economy include those who choose to participate in the economy and either derive their primary income or supplemental income from it, those who cannot enter traditional markets due to various barriers to opportunity and those who do extra independent work out of necessity. Appropriate policy responses need to understand the underlying factors that drive the decision-making to participate in the gig economy.

Defining the Gig Economy

A central goal of this research project was to develop a definition to support the objective of laying a foundation for the gig economy in Toronto. A standard definition emerged through this research and aligned with existing definitions (see Appendix B) developed by various jurisdictions, including the Congressional Research Service (CRS), California, the United Kingdom, and Australia. The project gig economy definition focuses on a gig worker perspective and includes all companies that participate in the economy and is as follows:

The gig economy is an integral part of the economic system. It represents the self-employed and non-standard workforce providing payment-by-task services to consumers through digital platforms and gig companies. While the self-employed gig worker provides services directly to the consumer, the non-standard gig worker enters into formal agreements with gig companies to provide services to the company's clients.

Key characteristics of the gig economy include:

  i. Part-time, temporary, short-term, and flexible working arrangements

  ii. Segmented economy in that some gig work is highly flexible, offers higher income and is often held by advantaged groups. These types of gigs could be performed on a supplemental basis. Other gig work is low income, multiple jobs by one person, offers less control and involves disadvantaged groups, who often rely on it for their primary livelihood.

  iii. Work in the economy is often precarious as it relates to job security, benefits, and income.

  iv. Gig workers include freelancers, consultants, dependent and independent contractors, professionals, and technical service personnel. Some examples of gig work include ride-hailing and delivery, creatives (artists, writers etc.), temp-agency workers, handyman services, programming, coding, and part-time teaching.

Directions and Recommendations

This section proposes key directions and recommendations for further workforce development efforts for Toronto's gig economy. The recommendations guide practitioners and stakeholders who lead and support this sector. Recommendations build on and synthesize existing studies by many organizations, including OWRAC Report, Advancing A Workforce Development Agenda for Toronto and Rebuilding Toronto's Gig Economy Policy Brief to ensure a holistic workforce development agenda for the economy.

The recommendations of the OWRAC Report that relate to the gig economy include:

- Recommendation 11: Pilot a virtual platform that matches supply and demand for various types of gig and contract work.

- Recommendation 15: Create and recognize the dependent contractor category for gig or platform workers in the app-based space and give this category of worker basic employment rights, such as termination pay, minimum wage, minimum or core benefits, regular payment of wages, pay stubs for pay accountability and notice of termination with severance entitlements.

- Recommendation 16: Require gig platform companies operating in Ontario to provide basic, easy-to-understand, full disclosure and transparency on payment, work allocation and penalties, suspensions or pay deductions.

The future directions and recommendations are foundational and focus on addressing the objectives, including laying a foundation for Toronto's gig economy, understanding the impact on disadvantaged groups, working in an unregulated environment, and informing future directions on measuring the gig economy.

Strategic Direction 1: Adopt a standard definition to describe Toronto's gig economy

To ensure that a strong foundation is laid for Toronto's gig economy, it is recommended that a standard definition be adopted. Our research indicates that implementing this recommendation requires intentional collaboration between the three orders of government. The following recommendations are proposed:

1. Building from the standard definition that has emerged through this research, regularly examine the alignment of the definition to ensure relevancy that respects this economy's fluidity and evolving nature.

2. Consult with gig worker communities, companies, researchers, and policymakers to promote a standard gig economy definition for Toronto and the province to understand the commonalities and the central characteristics that drive the economy.

3. Continue to foster a knowledge-sharing environment within the various government entities to enhance awareness of the gig economy and its definition.

4. Launch a marketing campaign and develop marketing materials, including advertisements and short videos that clearly describe the gig economy's various components and clarify misconceptions about this economy (e.g. Australia Fair Work Ombudsman promotional videos).

Strategic Direction 2: Focus workforce development efforts to support gig worker priorities

The gig worker survey conducted as part of this study identified that major priorities for gig workers include access to sick pay, job security, access to health insurance, opportunities to grow their career, consistency of work available and fair pay (refer to Appendix A - Survey Findings).

Furthering workforce development for the gig economy requires targeted efforts to support the priorities of gig workers. This should be a holistic approach considering participants' many barriers and the overall needs of the region. For gig workers wanting to be in the economy, benefits and compensation and barriers to participation should be addressed. For gig-workers seeking transition into more standard employee-employer jobs, there is a need to facilitate entry or re-entry into the labour force through preparatory support, connection with other services and opportunities to acquire workplace experience.

Focusing workforce development efforts also requires developing robust relationships with employers, understanding their needs, supporting them in receiving these job candidates, and engaging with employers to make jobs better for the company and the workers.

The 2021 Advancing A Workforce Development Agenda For Toronto is a key policy paper that can inform on gig worker priorities and needs. Options for advancing workforce development in Toronto include establishing a workforce development table to improve and expand workforce development activities. Opportunities exist to track progress and gain insights from this process. The OWRAC Report calls for government assistance to connect workers to training programs. It also highlights a possible role for government to help facilitate the establishment of navigation portals and make training programs more accessible for everyone.

Additional recommendations proposed through this study include:

5. Engage with gig worker communities to build a continual understanding of their needs, support skills development and training, business training and networking opportunities.

6. Foster partnerships with Workforce Planning Ontario to further research and resources relevant to training, employment and labour force information for the gig worker and the economy.

7. Enable access and promote co-working spaces in the city as key community spaces where gig workers can meet to network, market themselves and actively engage with clients.

8. Position a gig economy working group consisting of decision-makers and key stakeholders, including representatives from all three orders of government, gig workers, union representatives, gig companies, policymakers, and researchers. This will enable sharing of information and opinions to inform future research and understand the requirements for moving towards a more equitable gig economy.

Strategic Direction 3: Focus research to continually inform and measure the economy

This research project provided information on the current methodologies and research to measure the economy. Our research indicates that implementing this recommendation requires intentional collaboration between the three orders of government. To further learn of this economy, the following recommendations are proposed:

9. Engage with researchers to further understand which groups within the gig economy, including women, racialized Canadians, youth, newcomers, immigrants, seniors, Indigenous Peoples, and low-income earners, are disproportionately impacted. The University of Toronto School of Cities Fellowship Program could be leveraged to undertake this research.

10. Investigate and promote best/better practices to influence policies and further position the City of Toronto as a key enabler of a fairer gig economy. The Amsterdam Sharing City initiative is a key model that can be researched for applicability.

11. Develop labour market information to understand and examine the skills levels and occupations in the gig economy. The data collection should also focus on tracking metrics that inform socio-economic information and inclusivity, including age, gender, dwelling trends, immigration, mobility, income, indigenous population, visible minority, and education. The OWRAC's recommendation of a 'pilot virtual gig and contract work supply and demand platform,[30] could also be explored.

12. The National Occupational Classification (NOC) table (see Appendix C) could be a starting point for this research. The NOC is the national reference for occupations in Canada. It provides a systematic classification structure that categorizes Canada's entire range of occupational activities. Additional information on the NOC system is provided in Appendix C.

13. Undertake research to understand the long-term impact of COVID-19 on the gig economy, including economic recovery, the financial well-being of gig workers, impact on marginalized groups and the impact of online platforms and crowdsourcing marketplaces.

14. Continually engage with gig employers and sectors within the economy to understand their needs and undertake a sector-based approach to research and policy development.

Strategic Direction 4: Continue to track policy progress in the economy

As the gig economy evolves, allowing for greater flexibility and access to markets and products, there is a need to examine policies and processes to regulate gig economy employers and workers. As the research indicates, policymakers need to carefully analyze plans and develop responses that address individual sector and worker needs. In-depth consultation with specific industry bodies is needed before policymakers can enact meaningful change. Flexible policies that have provisions for workers (without

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[30]Alongside a legislative change that would modernize the Employment Standards Act, the OWRAC advises the Province of Ontario to consider piloting a platform to better match supply and demand for work. This might start by covering a limited set of occupations or types of work, and if proven effective, be expanded to cover larger parts of the economy.

having to depend on a single employer) and, at the same time, allow flexible work arrangements to continue to grow. Our research indicates that implementing this recommendation requires intentional collaboration between the three orders of government. The following recommendations are proposed:

15. Consider adopting the 2021 Ontario Workforce Recovery Advisory Committee (OWRAC) report and recommendations as a starting point to inform the future of work and the gig economy for Toronto.

16. Continue to track Ontario's proposed legislation that would give a $15 minimum wage to app-based gig workers to examine applicability and impact on the gig workers and the economy.

17. Continue to track progress on the provincial 'portable benefits' system, designed to benefit workers who do not have health, dental or vision coverage. The plan was one of 21 recommendations put forward by the Ontario Workforce Recovery Advisory Committee.

18. Monitor implementation of the 2020 Rebuilding Toronto's Gig Economy Policy Brief recommendations concerning transportation, childcare, affordable housing, employment equity & community development and developing best practices.

19. Promote the federal Canada Performing Arts Workers Resilience Fund (CPAWRF) for independent and self-employed workers in the live performance sector.

20. Research action and outcomes resulting from the 2015 Toronto Poverty Reduction Strategy that calls on adapting city programming and services to address the needs of those in precarious work.

Section 5

Appendices

Appendix A – Survey Findings

The Gig worker survey was conducted using an online panel methodology, with gig workers randomly selected from the population in Toronto.
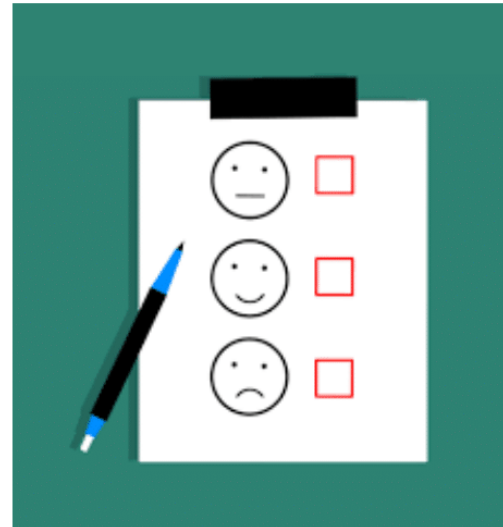
Sample Size:

163 Respondents currently working in the Gig Economy in Toronto were surveyed.

Interviews:

Respondents completed **10-12 minute** interviews during the week of **January 10th, 2022**.

Margin of Error:

7.7% at a 95% confidence level.

To start, we would like to know if you have worked in the GIG Economy Sector (n=163)

Category	Percentage
As an independent contractor, consultant and/or freelancer	67%
Through a temp agency and/or an on-call worker	25%
For a company on a contract basis	28%
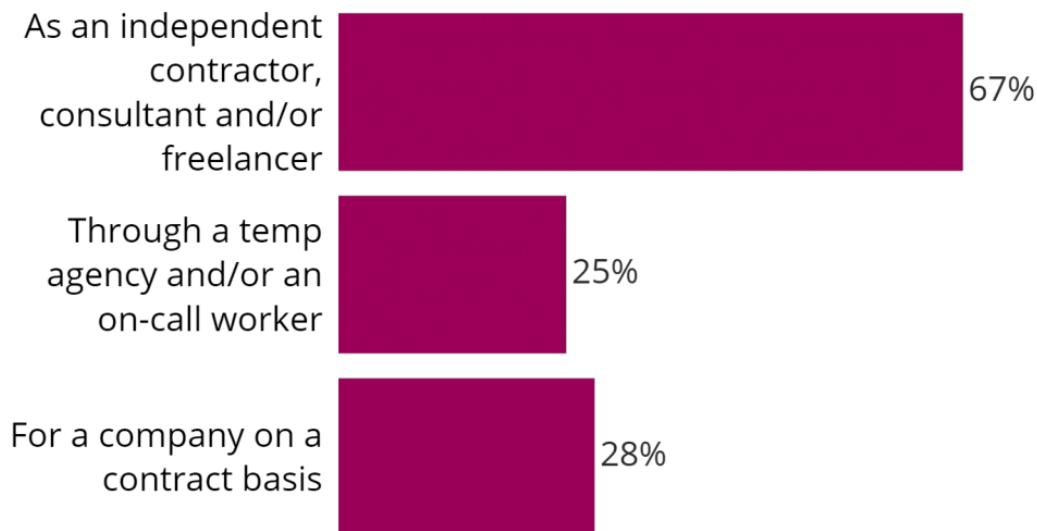
Thinking about your employment in the Gig Economy, are you working... (n=163)

Category	Percentage
Full-Time (35-hour work week or more)	45%
Part-Time (less that 35 hour work week)	26%
Casual/Occasional (hours as needed/as required)	33%
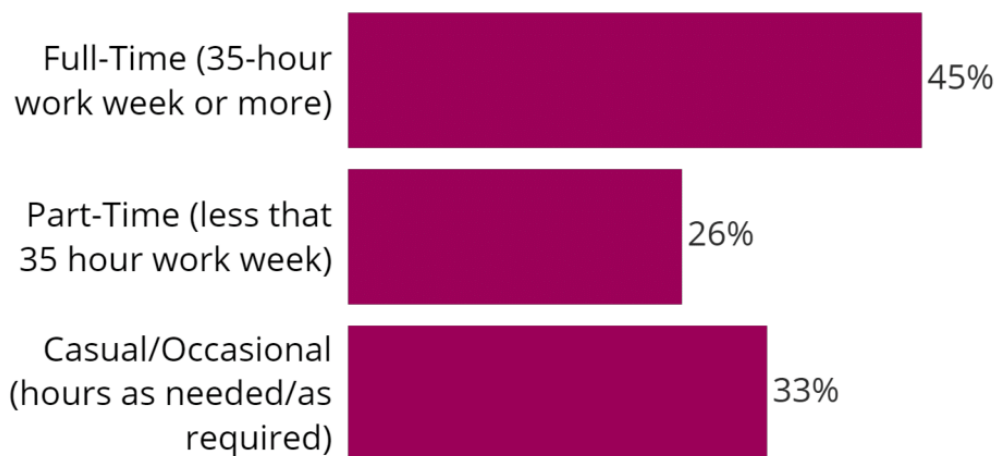
How many separate companies do you currently provide gig services to? (n=155)

Companies	Percentage
1	43%
2	30%
3	10%
4-9	14%
10+	3%
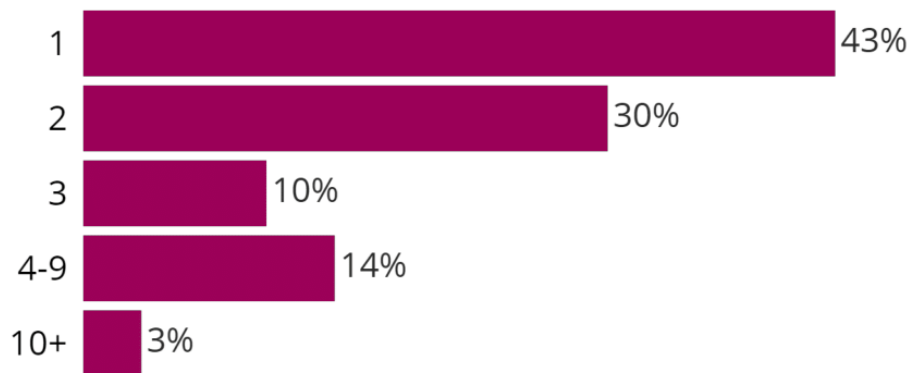
Is your employment in the gig economy in addition to regular employment...? (n=163)

Regular Employment: 69%

No Regular Employment: 31%

Full-time employee: 69%

Part-time employee: 31%
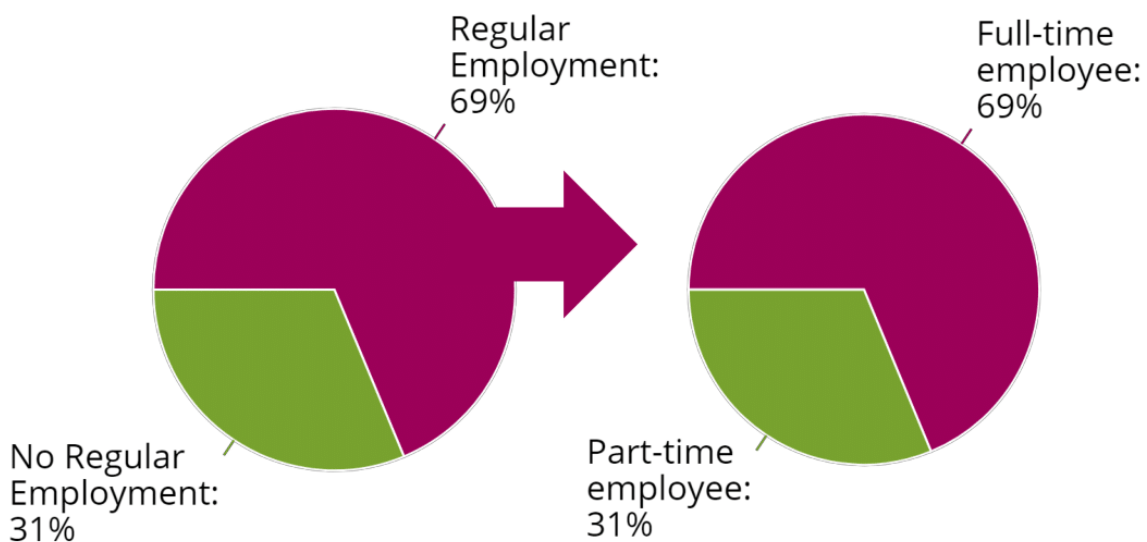
Which of the following types of Gig employment are you participating in? (n=163)

Type	%
Food delivery	33%
Home-based computer work	26%
Office work	21%
Data entry	19%
Service-related job(s)	16%
Ridesharing	15%
Education (online or in-person)	12%
Delivery (other than food)	10%
Other (Please Specify:)	15%
Other app-based role (Please specify:)	4%

Other app-based roles mentioned (Raw)

Pet sitting
Personal shopper
Contracting
Investment
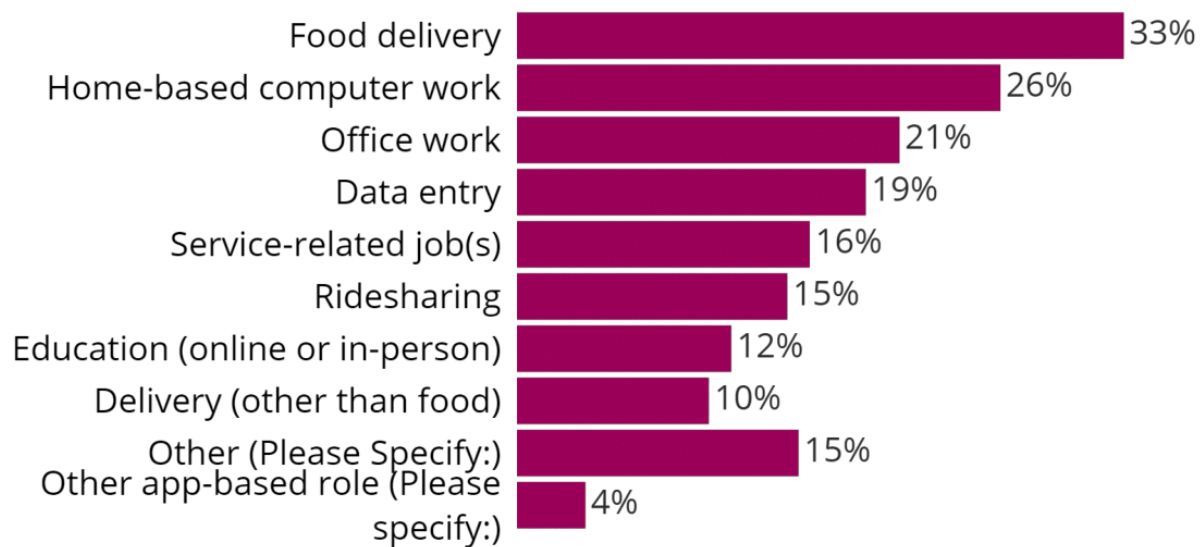
Other general roles mentioned (n=23)

Role	%
Creative (Writing, Drawing, Art, Music)	43%
Professional (Consulting, Finance, Research)	17%
E-commerce	9%
General Labour	9%
Data Input	4%
Contractor (Trades)	9%
Travel/Accommodations	9%

Benefits of Gig Work

In a few words, what would you say are the primary benefits of working in the Gig economy? (Coded responses, n=157)

Benefit	Percentage
Flexibility/Freedom to choose schedule	59%
Extra Income	20%
Independance	8%
Interacting with people/enjoy the work	7%
Build Experience/Clientele	5%
Easy Payment/Cash	4%
Few/no benefits	3%
Job-specific benefits	3%
More free time	1%
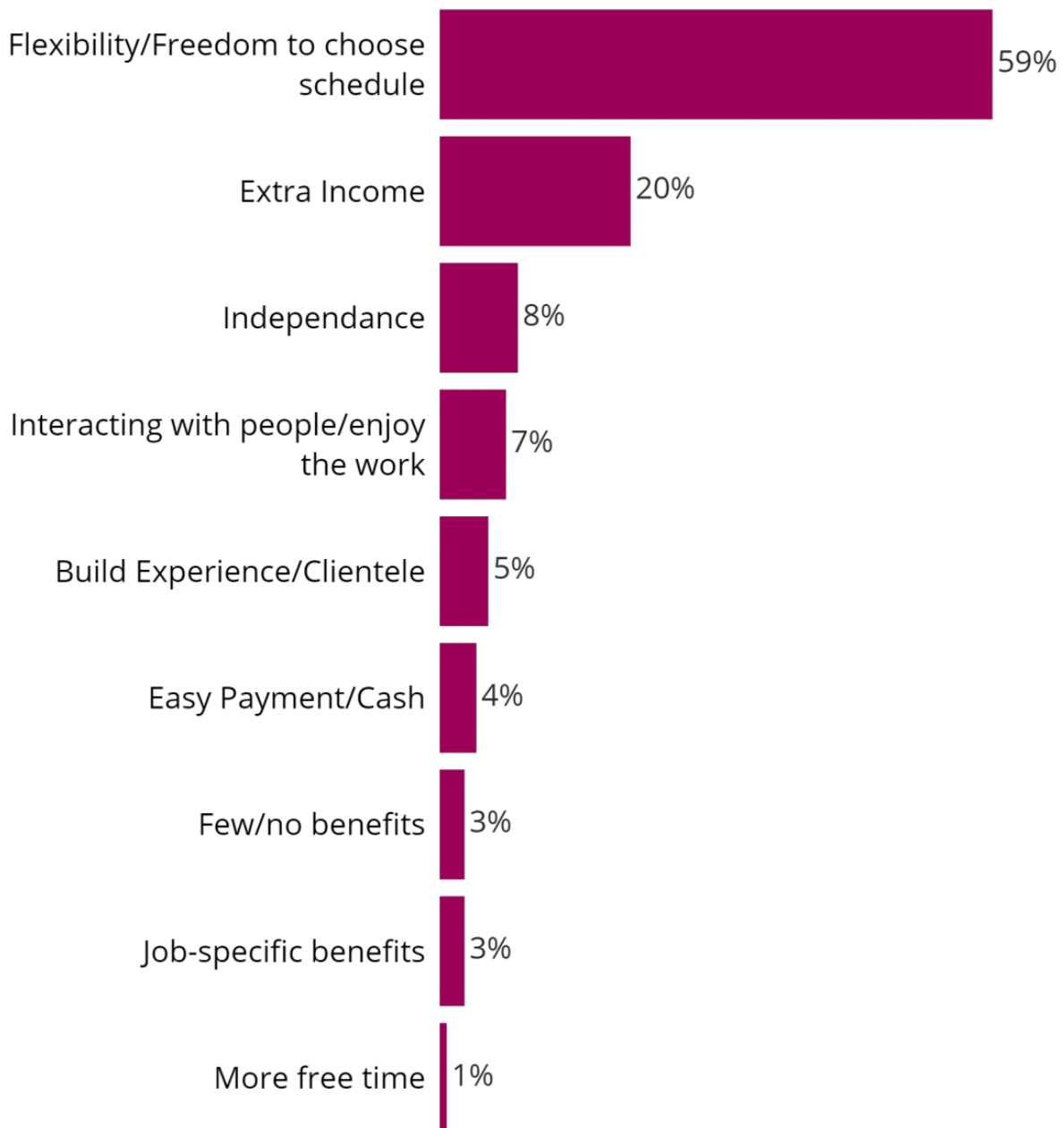
Challenges of Gig Work

In a few words, what would you say are the primary challenges of working in the Gig economy? (Coded responses, n=157)

Challenge	Percentage
Lack of stability/consistency	38%
Customer issues	14%
Time-Consuming/Impacts on free time	11%
Lack of benefits	10%
Quality/types of work available	10%
Low pay	10%
COVID Challenges	3%
No issues/challenges	3%
Job-specific challenges	2%
Need to cover job-related costs	1%
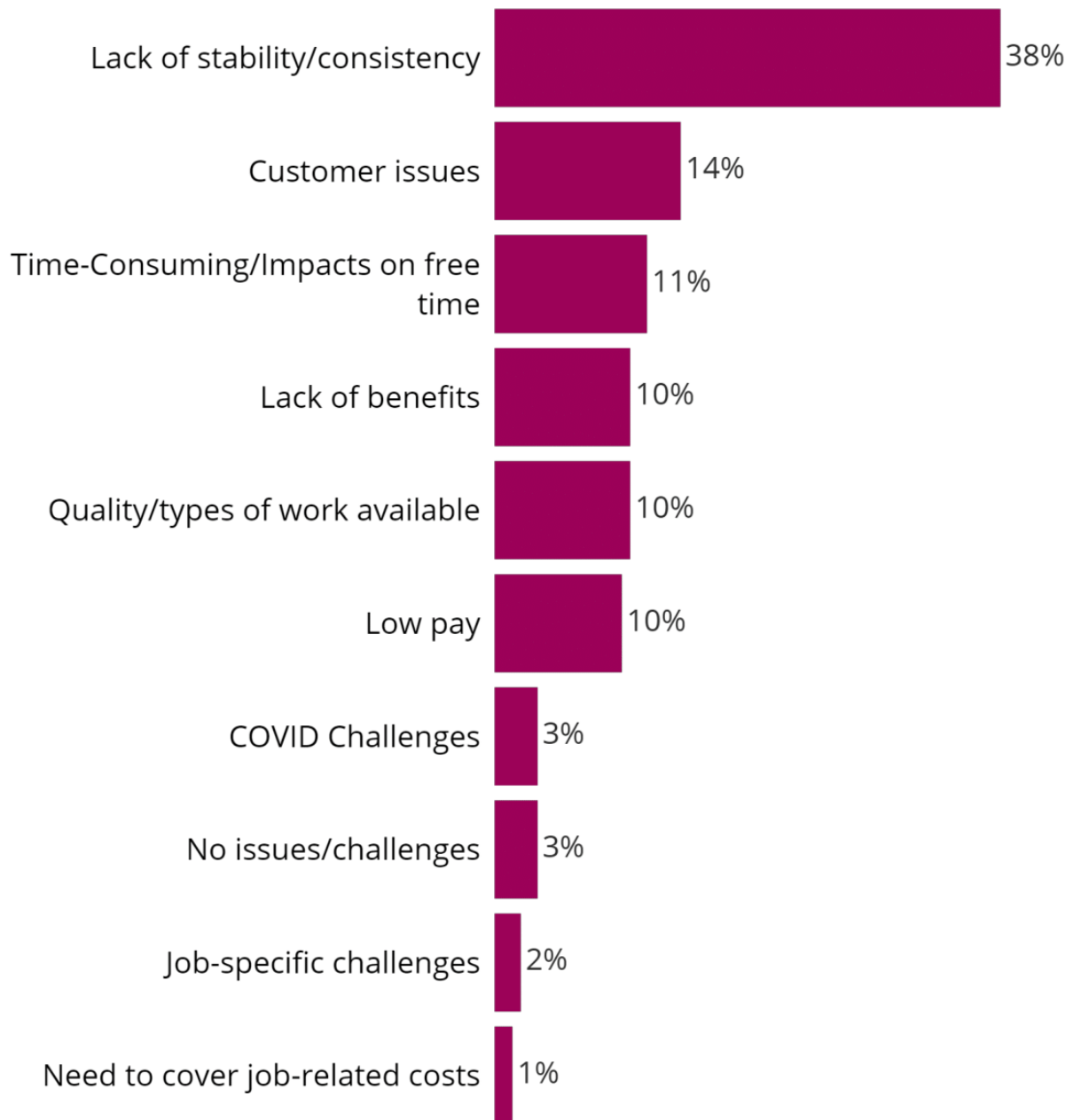
Overall, how satisfied are you participating in the Gig economy? (n=163)

91%

Of Gig workers were Very or Somewhat Satisfied with work in the industry.

36%

55%

6%

- Very Satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied
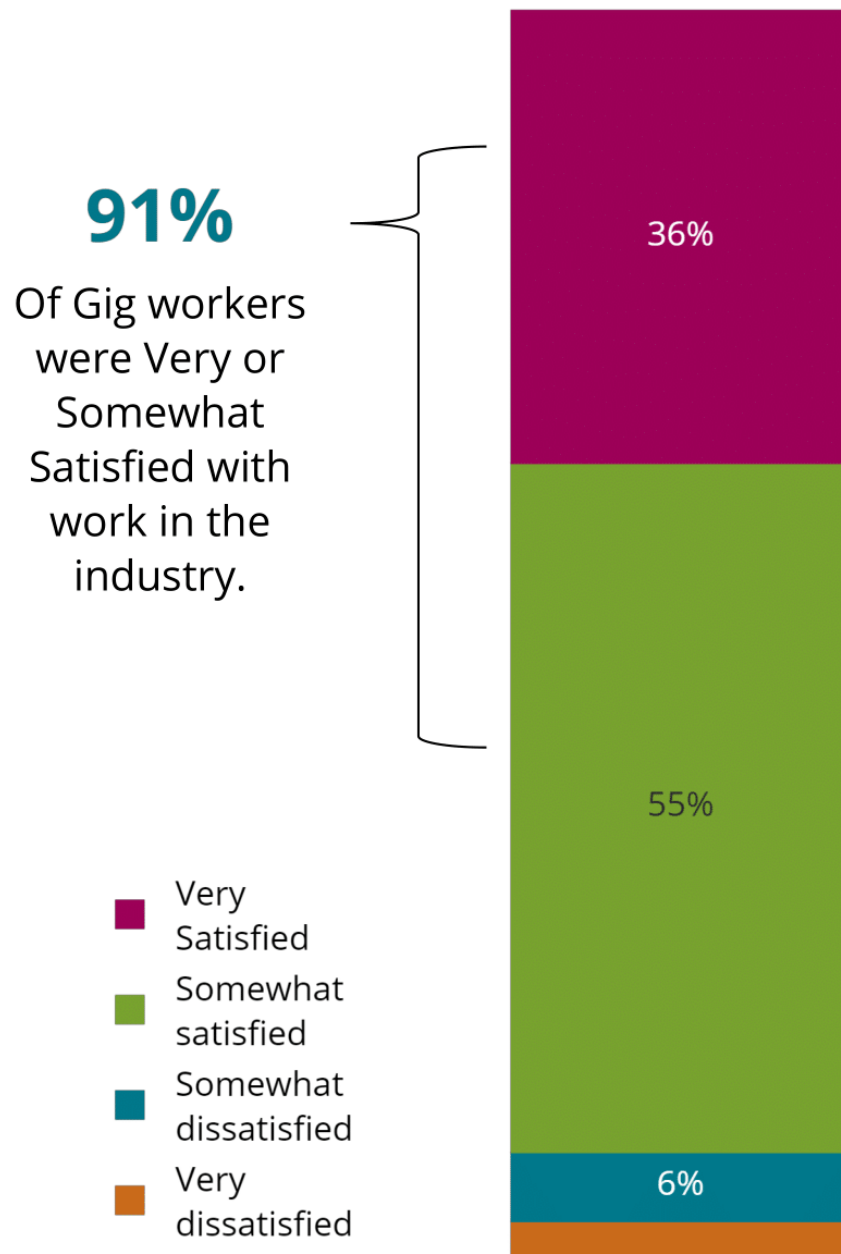
Satisfaction with Gig Work Factors

Overall, how satisfied are you with each of the following attributes of the Gig economy (n=163)

Attribute	Very Satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied
Ability to control amount of work	48%	40%	7%	
Work/Life balance	38%	50%	7%	
Flexibility of schedule	56%	31%	9%	
Flexibility of work arrangements	45%	39%	10%	6%
Ability to control amount of income	38%	39%	17%	6%
Protection from discrimination on the job	27%	49%	16%	8%
Variety of employment opportunities available	29%	47%	21%	
Protection from discrimination in hiring/selection process	33%	42%	17%	8%
Fair pay	25%	47%	21%	7%
Consistency of work available	21%	44%	27%	9%
Career growth opportunities	26%	38%	22%	14%
Job security	21%	36%	26%	17%
Access to health insurance	25%	28%	18%	29%
Access to sick pay	17%	28%	25%	31%

Legend:
- **Very Satisfied**
- **Somewhat satisfied**
- **Somewhat dissatisfied**
- **Very dissatisfied**

The Priority Matrix consists of three metrics:
Level of Importance: A statistical measure of the strength of relationship between the factor, and overall satisfaction.
Performance: The percentage of gig workers somewhat or very satisfied with this attribute of the gig economy.
Priority rank: Determined for each factor based high levels of importance and low levels of performance.

	Importance	Performance	Priority Rank
Access to sick pay	7.2	45%	1
Job security	7.2	57%	2
Access to health insurance	6.3	53%	3
Career growth opportunities	7.5	64%	4
Consistency of work available	7.3	64%	5
Fair pay	8.3	72%	6
Protection from discrimination on the job	8.3	76%	7
Ability to control amount of income	8.3	77%	8
Protection from discrimination in hiring/selection process	6.6	75%	9
Variety of employment opportunities available	6.7	76%	10
Flexibility of work arrangements	9.0	85%	11
Ability to control amount of work	8.6	88%	12
Flexibility of schedule	8.1	88%	13
Work/Life balance	7.9	88%	14

Marginalized Populations

Member of a marginalized population? (n=163)

Yes: 47%

Prefer not to answer: 4%

No: 48%
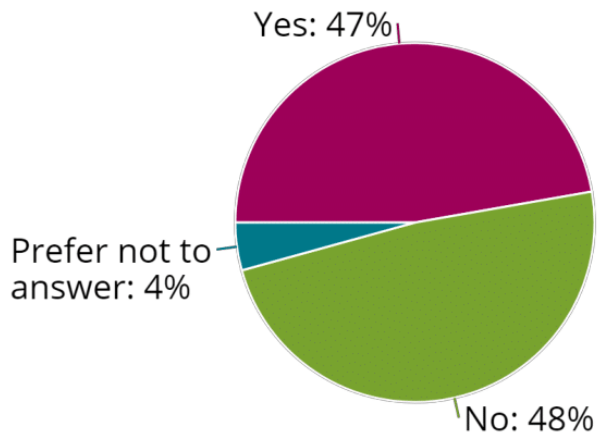
Affected by discrimination? (n=84)

Yes: 14%

No: 86%
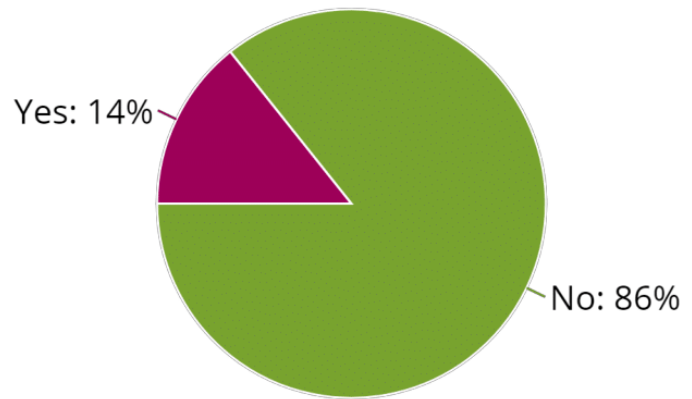
Types of discrimination mentioned (n=7)

Racism/Discrimination on Ethnic Origin	43%
Sexism/Gender-Based	29%
Disability-Related	14%
Mental Health Related	14%

Which of the following best describes your long-term employment goals? (n=163)
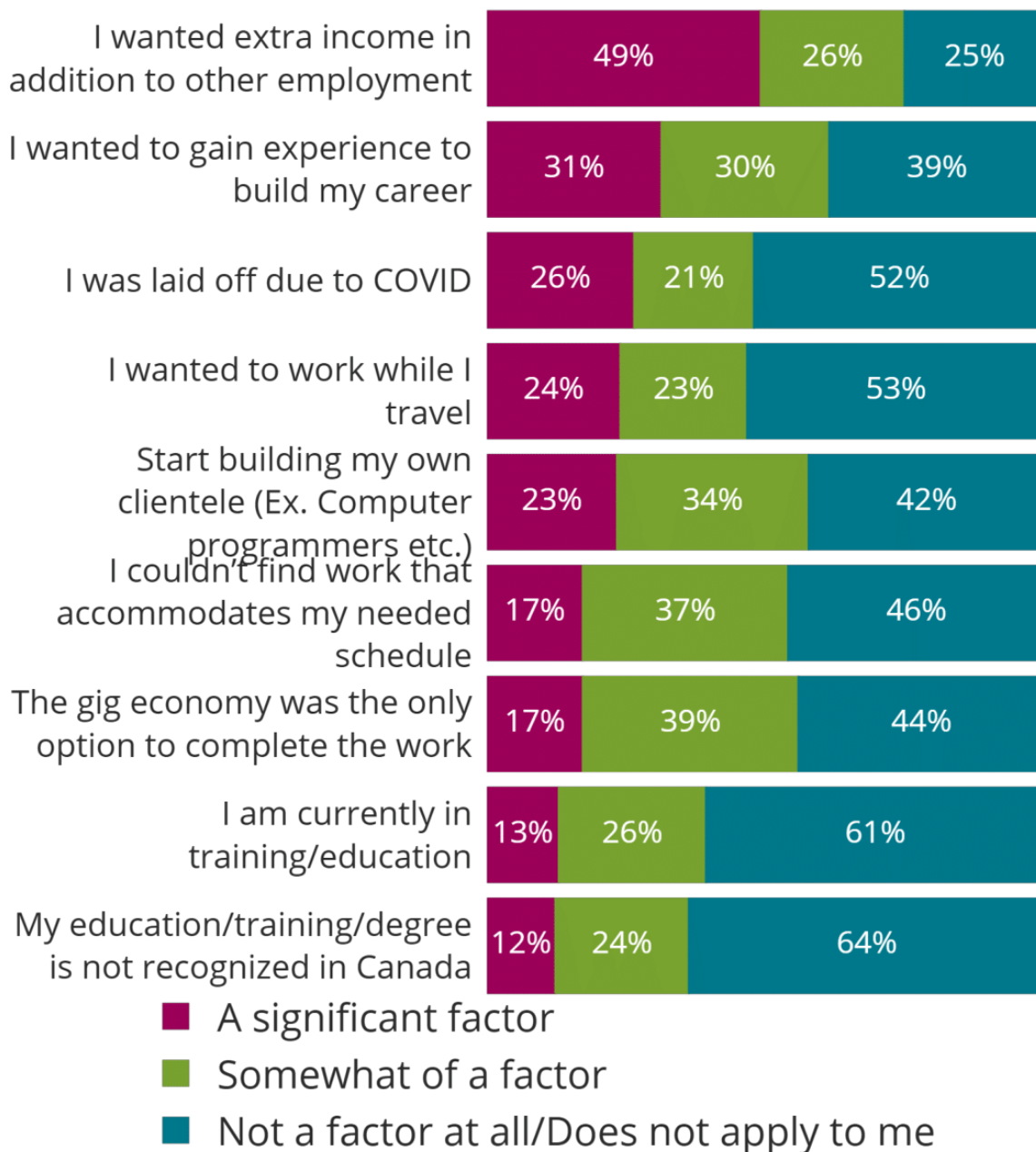
To remain employed in the gig economy only — 36%

To continue working in the gig economy while also working as an employee/professional — 49%

To exit the gig economy and obtain a job as an employee/professional — 8%

To exit the gig economy and start a business — 7%

Please briefly explain why you would like to remain in the gig economy in the long-term. (n=163)

To what extent was each of the following statements a factor in your decision to participate in the Gig Economy? (n=163)

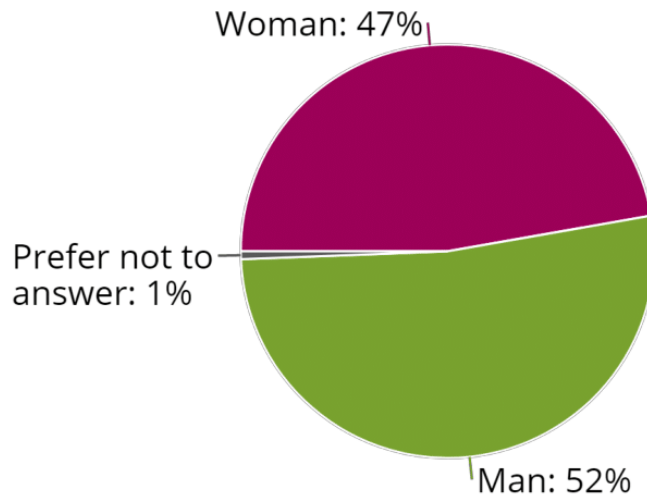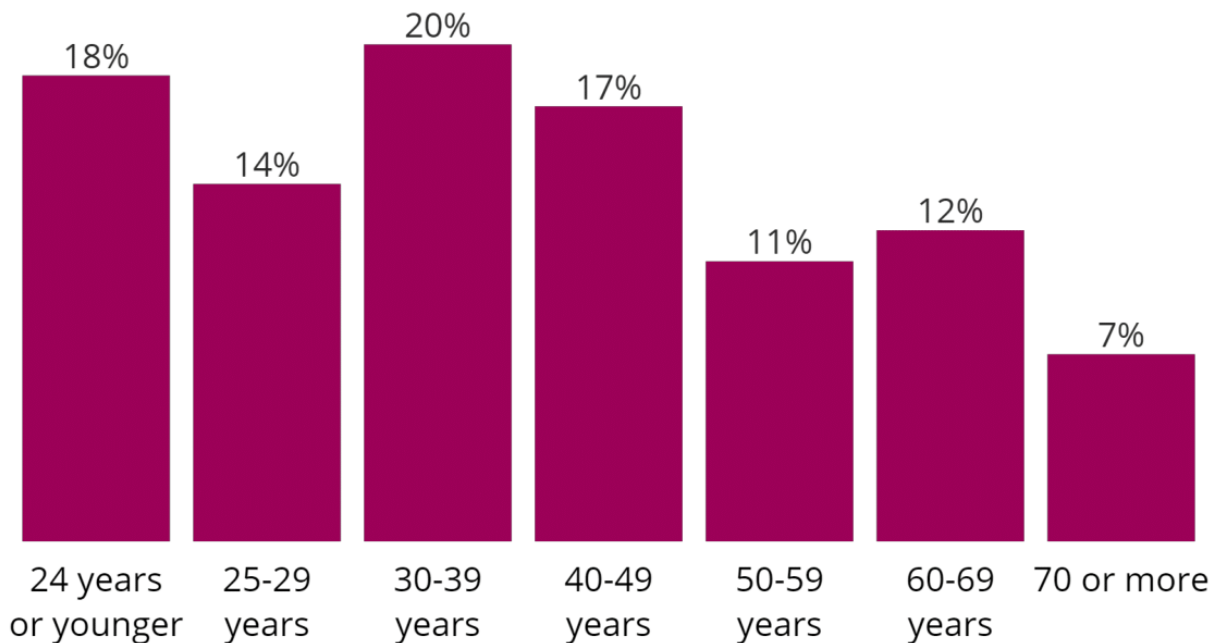| Statement	A significant factor	Somewhat of a factor	Not a factor at all/Does not apply to me
I wanted extra income in addition to other employment	49%	26%	25%
I wanted to gain experience to build my career	31%	30%	39%
I was laid off due to COVID	26%	21%	52%
I wanted to work while I travel	24%	23%	53%
Start building my own clientele (Ex. Computer programmers etc.)	23%	34%	42%
I couldn't find work that accommodates my needed schedule	17%	37%	46%
The gig economy was the only option to complete the work	17%	39%	44%
I am currently in training/education	13%	26%	61%
My education/training/degree is not recognized in Canada	12%	24%	64%

- A significant factor
- Somewhat of a factor
- Not a factor at all/Does not apply to me

What best describes your gender? (n=163)

Woman: 47%

Prefer not to answer: 1%

Man: 52%

What is your age? (n=163)

18% — 24 years or younger

14% — 25-29 years

20% — 30-39 years

17% — 40-49 years

11% — 50-59 years

12% — 60-69 years

7% — 70 or more

Do you identify as Indigenous to Canada? (n=163)

Yes: 5%

Prefer not to answer: 1%

No: 94%
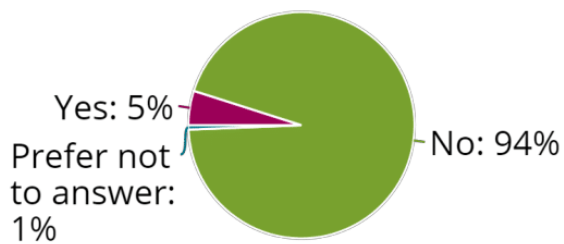
Were you born in Canada? (n=163)

Prefer not to answer: 2%

Yes: 66%

No: 33%
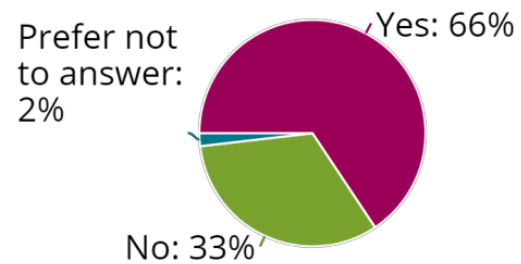
How long have you been in Canada? (n=53)

- 0-5 years: 19%
- 6-10 years: 17%
- More than 10 years: 64%
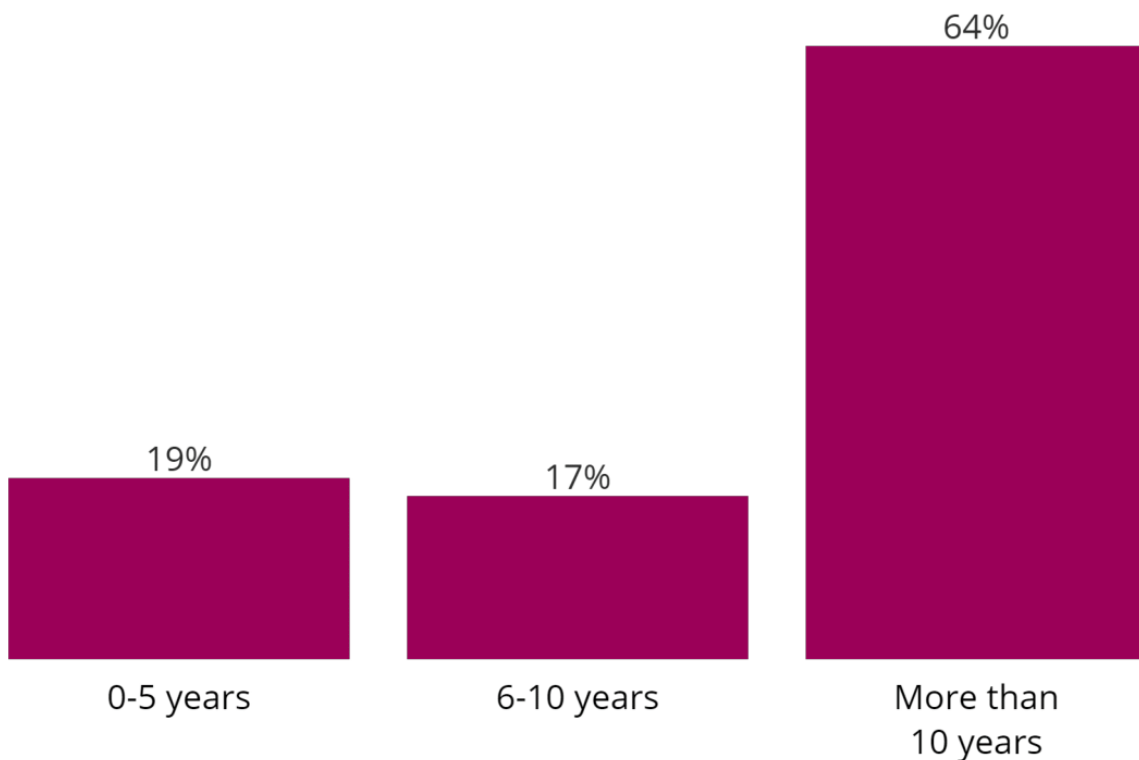
Which race category best describes you?
(n=163)

White: 50%

First Nations, Inuit or Métis: 4%

Arab, Middle Eastern or West Asian: 5%

Southeast Asian: 6%

Black: 7%

East Asian: 12%

South Asian or Indo-Caribbean : 19%
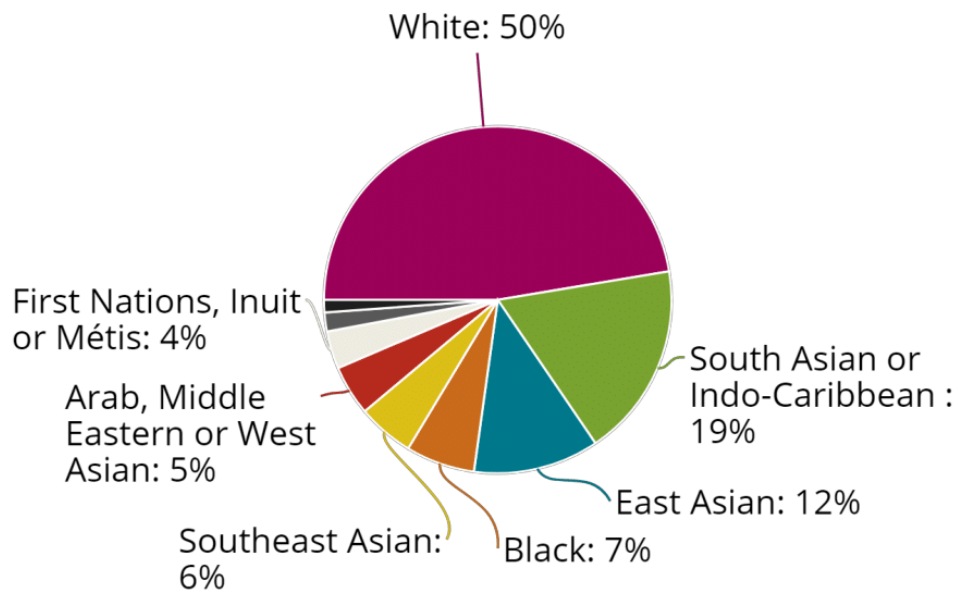
What was your total household income before taxes last year? (n=154)

Income Range	Percentage
0 - $29,999	4%
$30,000 - $49,999	15%
$50,000 - $69,999	25%
$70,000 - $99,999	26%
$100,000 - $149,999	20%
$150,000 or more	10%
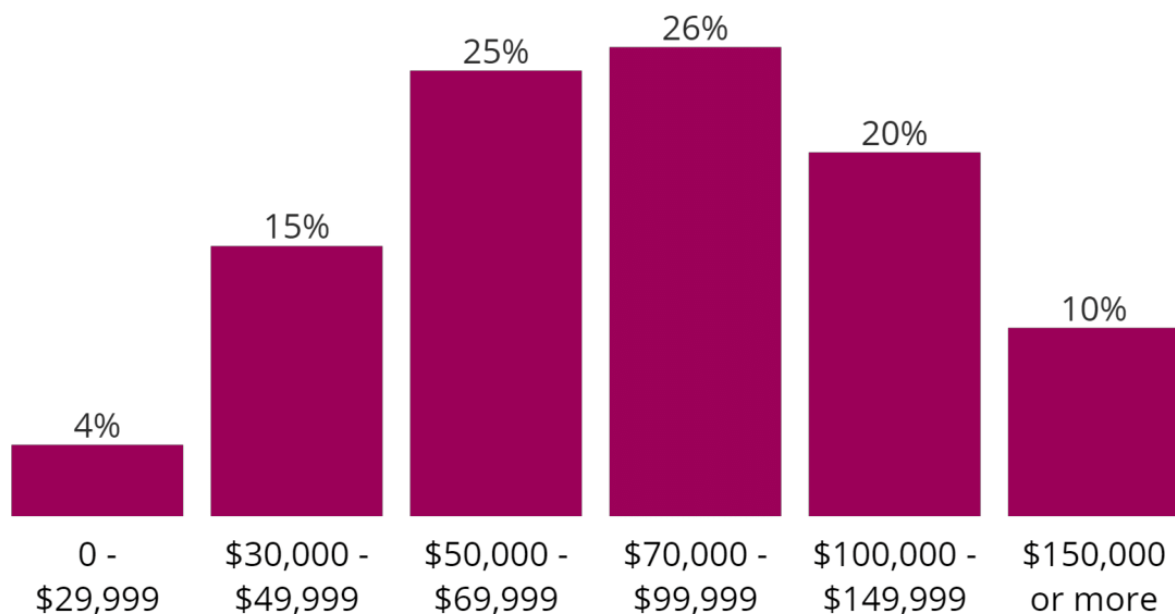
Did you receive your highest degree or diploma in Canada? (n=163)

Prefer not to answer: 5%

Yes: 82%

No: 13%
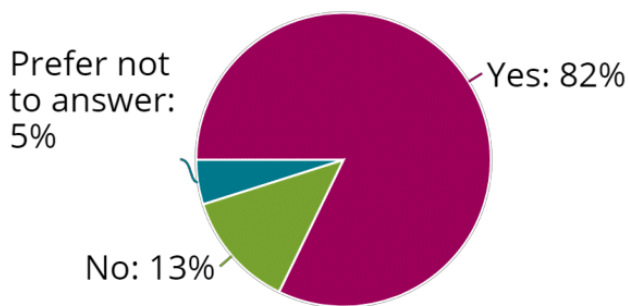
Origin of Highest Diploma or Degree (n=20)

India	35%
China	10%
Pakistan	10%
United Kingdom	10%
Brazil	5%
Egypt	5%
Philippines	5%
South Africa	5%
Taiwan	5%
Trinidad	5%
Uruguay	5%

What is the highest level of education you have completed? (n=158)

Degree or diploma from a college or university	Graduate or professional degree	High School or equivalent	Less than high school
57%	28%	15%	0%
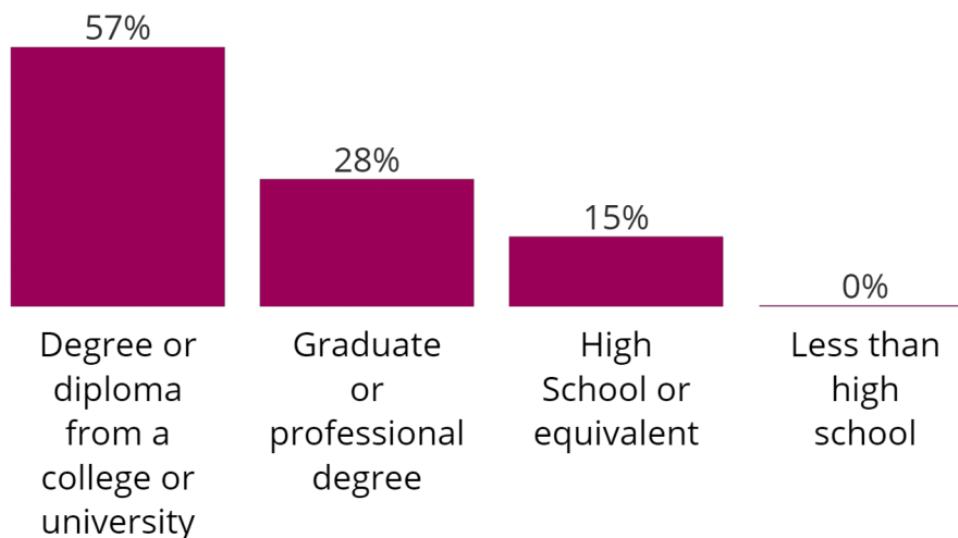
Appendix B – Comparing Gig Economy Definitions

This table shows the existing definitions/descriptions of the gig economy in key jurisdictions and policy institutes and the definition developed as part of this research project. The definition was developed from a gig worker perspective as they form the central component of the gig economy and build on, adopts, and align with existing definitions. It recognizes the gig workers who are either self-employed or non-standard employment and the key differences among them. The non-standard employment as defined by Labour Market Information Council is adopted for this work.

Congressional Research Service (CRS)	California	United Kingdom	Australia	This Research Definition
The collection of markets that match providers to consumers on a gig (or job) basis in support of on-demand commerce. In the basic model, gig workers enter into formal agreements with on-demand companies to provide services to company's clients. Prospective clients request services through an Internet-based technological platform or smartphone application that allows them to search for providers or to specify jobs. Providers (gig workers) engaged by the on-demand company provide the requested service and are compensated for the jobs.	*Gig Economy*: A catch-all term that refers to the companies, platforms, users, and workers participating in independent gig work—including contractors, consultants, temporary, and other contingent workers. *Independent Contractor*: A legal classification of workers who, in general, control their own workload, hours, and supply their own equipment. These workers are not considered employees, and not entitled to workplace benefits and protections that come with traditional employment. *Employee*: A traditional employee is a regular common-law worker who in general receives a set hourly	The gig economy involves the exchange of labour for money between individuals or companies via digital platforms that actively facilitate matching between providers and customers, on a short-term and payment-by-task basis.	In the gig economy, individuals provide services to consumers for a fee via digital platforms or marketplaces. These platforms can provide consumers with greater choice and flexibility in their daily lives. Common gig economy services in Australia include: *Ride sharing services* – for example, where consumers book an individual to drive them somewhere *Delivery services for a fee* – for example, where consumers engage an individual to deliver food or other items to them *Personal services for a fee* – for example, where consumers engage an	The gig economy is an integral part of the economic system and refers to the self-employed and non-standard workforce providing payment-by-task services to consumers through digital platforms and gig companies. While the self-employed gig worker provides services directly to the consumer, the non-standard gig worker enters into formal agreements with gig companies to provide services to company's clients. ▪ Key characteristics of the gig economy include: Part-time, temporary, short-term, and flexible working arrangements Segmented economy in that

				individual to provide creative or professional services like graphic design and web development, or odd jobs like assembling furniture and house painting.	some gig work is highly flexible, offers higher income and often held by advantaged groups. These types of gigs could be performed on a supplemental basis. Other gig work is low income, multiple jobs by one person, offer less control and disproportionately leans towards disadvantaged groups, who often rely on it for their primary livelihood.
or annual salary for their work for an organization and is entitled to benefits and legal protections.					The nature of work in the economy is often precarious as it relates to job security, benefits, and income.
					Gig workers include freelancers, consultants, dependent and independent contractors, professionals, and technical service personnel. Some examples of gig work include ride-hailing and delivery gigs, creatives (artists, writers etc.), temp-agency workers, handyman services, programming, coding, and part-time teaching.

Appendix C – Suggested National Occupation Classification (NOC) and Skill Levels

The National Occupational Classification (NOC) is the national reference for occupations in Canada. It provides a systematic classification structure that categorizes the entire range of occupational activity in Canada for collecting, analyzing, and disseminating occupational data for labour market information and employment-related program administration. Occupational information is of critical importance for the provision of labour market and career intelligence, skills development, occupational forecasting, labour supply and demand analysis, employment equity, and numerous other programs and services.

The NOC comprises about 30,000 job titles gathered into 500-unit groups, organized according to four skill levels and ten broad occupational categories. Unit groups are based on similarity of skills, defined primarily by functions and employment requirements. Unit groups can often be linked directly to one occupation (such as NOC 3113 – Dentists) or to more than one occupation (such as NOC 2271 – Air pilots, flight engineers and flying instructors). Each unit group provides a short description of its associated occupation(s), lists its main duties and employment requirements, and provides examples of job titles.

The table below shows the NOC and skill levels that could be closely associated with the Gig Economy Occupations. The gig economy occupations identified through the panel survey as part of this research. The occupations listed in the survey include Ridesharing, Food delivery, Delivery (other than food), Office work, Home-based computer work, Data entry, Education (online or in-person) and Service-related job(s). Open-ended options were also provided for other app-based role and other occupations. The responses were then coded to occupations that could closely align with the responses. The following table should be assessed for the range of skills that constitute the gig economy rather than focus on the occupation codes. Skills levels in the gig economy include the four major groups, as follows:

- Skill Type 0 (zero): management jobs

- Skill Level A: professional jobs that usually call for a degree from a university

- Skill Level B: technical jobs and skilled trades that usually call for a college diploma or training as an apprentice

- Skill Level C: intermediate jobs that usually call for high school and/or job-specific training

Occupation	Associated NOC	Skill Level
Business Consulting and Research	1122 Professional occupations in business management consulting	A
Cultural and Creative Occupations	524 - Creative designers and craftsperson	A - B
	215 - Architects, urban planners, and land surveyors	
	217 - Computer and information systems professionals	
	51- Professional occupations in art and culture	
	52- Technical occupations in art, culture, recreation, and sport	
Data entry	1422 – Data entry clerks	C
E-commerce	6421 - Retail salespersons	C
Education (online or in-person)	40 - Professional occupations in education services	A
	4413 – Elementary and secondary school teacher assistants	C
Finance and Investment	0122 Banking, credit, and other investment managers	0
	1112 Financial and investment analysts	A
	1113 Securities agents, investment dealers and brokers	A
	1212 Supervisors, finance, and insurance office workers	B
Food Delivery	7514 – Delivery and courier service drivers	C
Home-based Computer work	0213 Computer and information systems managers	0
	2147 Computer engineers (except software engineers and designers)	A
	2174 Computer programmers and interactive media developers	A
	2281 Computer network technicians	B
Office work	1211 Supervisors, general office, and administrative support workers	B
	1212 Supervisors, finance, and insurance office workers	B
	1411 – General office support workers	C
Personal Shopper	6623 – Other sales related occupations	D
Pet Sitting	6563 – Pet groomers and animal care workers	C
Ridesharing	7513 – Taxi and limousine drivers and chauffeurs	C

Occupation	Associated NOC	Skill Level
Trades and General Labour	0712 - Home building and renovation managers	0
	6733 - Janitors, caretakers and building superintendents	D
	7522 - Public works maintenance equipment operators and related workers	C
Travel/Accommodations	6313 – Accommodation, travel, tourism, and related services supervisors	B
	652 – Occupations in travel and accommodation	C