Future Skills Centre
Centre des Compétences futures

MAY 2023

# QUALITY OF WORK
## of Canada's contingent workforce

Belongnomics

INCLUSIVITY – WELL-BEING – BELONGING

Future Skills Centre | Centre des Compétences futures

The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to preparing Canadians for employment success. We believe Canadians should feel confident about the skills they have to succeed in a changing workforce. As a pan-Canadian community, we are collaborating to rigorously identify, test, measure, and share innovative approaches to assessing and developing the skills Canadians need to thrive in the days and years ahead. The Future Skills Centre was founded by a consortium whose members are Toronto Metropolitan University, Blueprint ADE, and The Conference Board of Canada, and is funded by the Government of Canada's Future Skills Program.

Belongnomics

INCLUSIVITY - WELL-BEING - BELONGING

Belongnomics focuses on creating research-driven, data-backed solutions to foster:

- Inclusive Growth
- Well-being
- Sustainability

To achieve lasting positive societal impact, we partner and collaborate with organizations determined to generate evidence-based results for a better society.


## Acknowledgements

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Canada


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The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.


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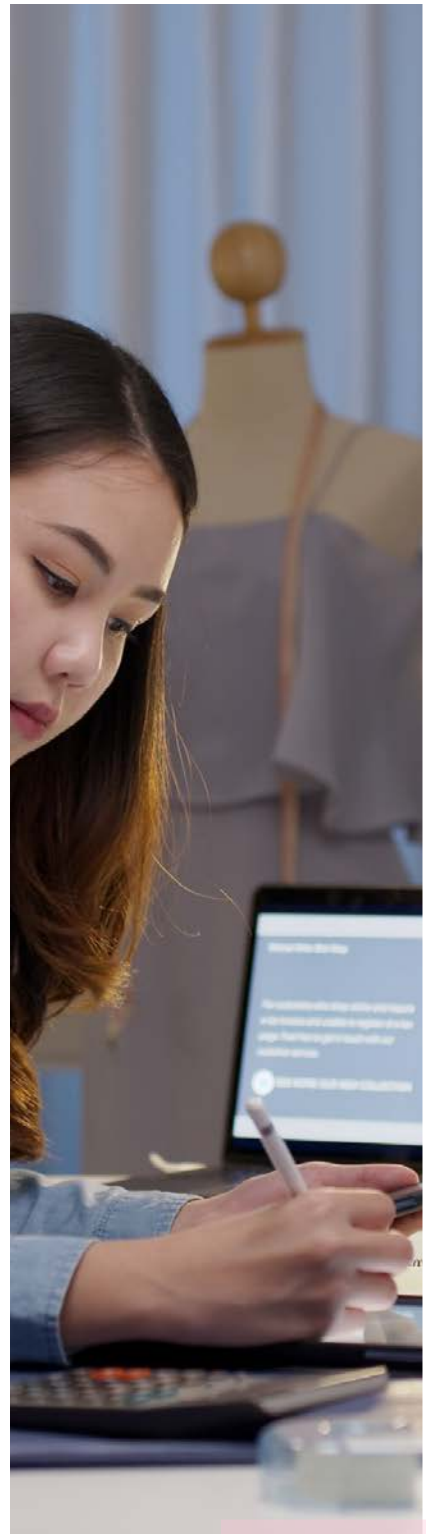
# Executive summary

*Increasing digitalization and the growth of the "platform economy" - defined as businesses that facilitate digital exchanges between two or more independent parties - have been impacting labour markets across Organization for Economic Cooperation and Development Countries ('OECD') countries over the past decade. The rise in gig work is one of these effects, which is characterized by short-term, on-demand, and task-based labour. To date there has been limited clarity on the profile, context and rationale for why people engage in gig work. This lack of understanding suggests a potential gap between the evolving needs of this workforce and available policy support.*



To examine further the nature of gig work in Canada and understand the quality of work associated with this type of employment, in 2022 we undertook research into and conducted a national survey of 1,000 gig workers across Canada. Our principal survey findings suggest that gig workers account for about 21% of Canada's labour force, and that:

- More men (55%) than women (43%) engage in gig work.
- Gig work is skewed towards younger age cohorts.
- Most gig workers identify as White (65%), and 34% identify as members of a racialized group.

To explore the motivations for gig work and the working conditions encountered, we applied a framework initiated by the McKinsey Global Institute* that has been adapted to categorize gig workers along a spectrum of reasons and motivations as follows:

- **Free agents:** Where gig work is an individual's preferred choice and the primary source of income.
- **Casual earners:** Which refers to those for whom gig work is a personal choice and the resulting income is supplemental.
- **Reluctants:** For whom gig work is conducted out of necessity and is the primary source of income.

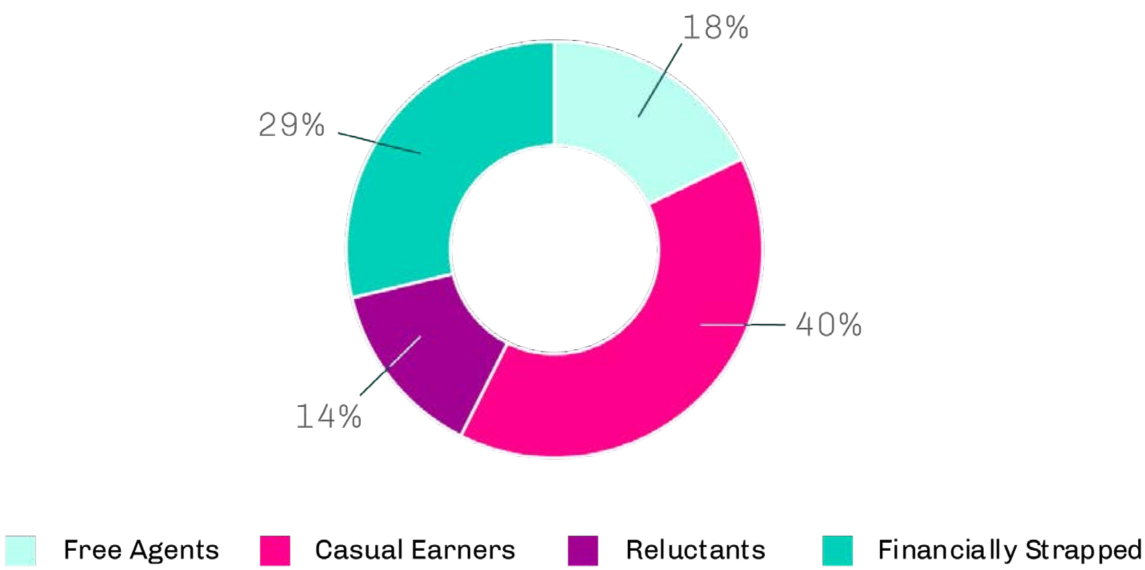
* A McKinsey Global Institute report on gig work proposed four categories of independent worker; these four categories were further adapted by the World Economic Forum to apply to platform-based workers. See: https://www3.weforum.org/docs/WEF_The_Promise_of_Platform_Work.pdf

- **Financially strapped:** This group participates in gig work out of necessity to supplement an insufficient main source of income.

Applying this framework to our results, we find that 'Casual Earners' form the largest group of gig workers in Canada, as 40% of respondents engage in gig work as a personal choice to earn additional income. The group of 'Financially Strapped' is the second largest (29%), followed by 'Free Agents' (18%) and 'Reluctants' (14%).

**FIGURE ES.1:**

**Share of gig Workers by motivation**




**Percentages do not add up to 100% due to rounding*

Overall, 'Reluctants' and 'Financially Strapped' appear to be the more vulnerable groups among Canadian gig workers. These segments tend to be younger, are more likely to be a member of a Racialized Group and less likely to hold Canadian citizenship. 'Reluctants' are also overrepresented among lower income groups.

Working conditions and barriers faced by gig workers also depend on the type of gig work conducted (i.e., while food delivery services and rideshare drivers account for relatively small shares of overall gig work, these are among the top types of work conducted by the 'Financially Strapped').

In combination, the more vulnerable groups of gig workers - 'Reluctants' and the 'Financially Strapped'- account for roughly 43% of all gig workers in Canada. This indicates that it would be incorrect to equate all forms of gig work with precarious work; and it underscores the value of targeted policy solutions to address the barriers and experiences identified for each group.

With respect to the latter, and given our geographic focus on OECD countries, we apply the OECD framework on job quality, which examines three dimensions: earnings quality, labour security and quality of the working environment.[†] Applying this framework to our data suggests that 'Free Agents' would mostly benefit from increased labour market security, whereas 'Casual Earners' might benefit more through a strengthening of earnings quality.

† The OECD has developed a framework to measure and assess the quality of jobs that considers three objective and measurable dimensions. Together, they provide a comprehensive assessment of job quality that is both important for helping to assess worker well-being and relevant for policy-makers.

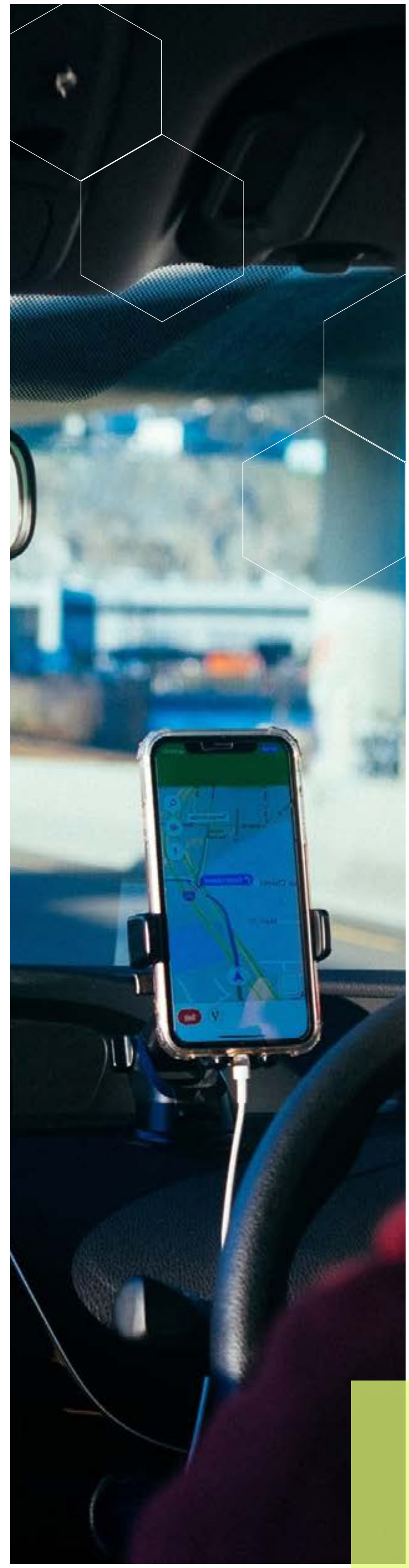
Support for the ‘Financially Strapped’ should encompass all three dimensions of job quality, such as: (1) implementing policies that strengthen earnings quality (and specifically regarding increased average earnings and collective bargaining, which was highlighted in survey responses collected from this group), (2) fostering labour market security, such as benefits payments, and (3) improving the quality of the working environment, especially with regard to addressing anti-social and irregular hours.

For ‘Reluctants’, the picture that emerges is that of a group of people that may have less access to or understanding of available supports, may have less formal educational achievement, and fewer financial means. They are overrepresented in terms of youth, recent immigrants and racialized Canadians. Given that ‘Reluctants’ only participate in gig work because they are unable to obtain regular employment, the best policy objective would consist of addressing labour market barriers for youth, recent immigrants and racialized Canadians. These groups might further benefit from a closer examination of skills matching and improved labour market information regarding upskilling and training opportunities.

The research presented here provides a base to further explore targeted policy options for gig workers. As noted in our report, efforts are underway in several jurisdictions to strengthen gig workers’ bargaining power or to provide similar benefits to those common in traditional work arrangements. Some of these efforts can provide valuable lessons to support the more vulnerable groups of gig workers. Going forward, digitization and automation are set to disrupt labour markets and work arrangements further, potentially increasing the number of gig workers. This in turn will require consideration of how labour market regulations will need to adjust to account for less traditional work arrangements in the future.

# Introduction

*Increasing digitalization and the growth of the platform economy have been impacting labour markets across Organization for Economic Cooperation and Development Countries ('OECD') countries over the past decade.‡ In general, the platform economy is characterized by a digital technology used as an intermediary to connect two or more independent parties, e.g. buyers and sellers in online markets or employers and employees. Consequently, the rise in gig work is one of the effects of increasing digitalization.*



Gig work itself is commonly characterized by short-term, on-demand, and task-based labour, and overlaps closely with self-employed work, contingent work and freelancing.[1] As noted, digital technology has enhanced the possibility for task-based labour across a variety of industries through labour-based platforms. These can generally be distinguished into on-demand vs. crowd-work platforms. On-demand platforms facilitate the performance of physical tasks such as ride-shares and food deliveries, among other tasks. Recent Labour Force Survey ('LFS') data by Statistics Canada indicate that in 2022, approximately 250,000 Canadians provided rideshare or delivery services.

In contrast, on crowd-work platforms, such as Upwork, Freelancer or Mechanical Turk, gig workers typically perform short-term tasks or projects online. As measured in the 2022 LFS, services Canadians provided via crowd-work platforms included videos, blogs and podcasts (58,000 people), programming, coding, web or graphic design (42,000) and teaching or tutoring (41,000).[2]

The various forms gig work can take, then, can lead to inconsistencies in definitions. While some studies focus exclusively on platform workers, others include additional forms of non-standard work. Thus, based on the definition or focus applied, exact numbers on the share of gig workers in the economy can vary.[3] A recent study by Statistics Canada suggests that the share of gig workers increased from 5.5% in 2005 to 8.2% in 2016,[4] whereas the Bank of Canada's Canadian Survey of Consumer Expectations ('CSCE') suggests that almost a third of Canada's labour force participated in gig work in 2018.[5] Similar to the Bank of Canada's estimates, survey data by Angus Reid found that around 34% of Canadian adults had been engaged in gig work in 2018.[6]

Despite such varied estimates, and in line with global trends, the share of the gig workers is expected to grow in Canada over the medium term.[7] As

‡ As of April 1, 2022, 38 countries are currently members of the Organization for Economic Co-operation and Development (OECD), founded in 1960, see: https://www.oecd.org/about/document/ratification-oecd-convention.htm

various entities have pointed out, not only is it difficult to assess the specific size of the gig economy in Canada but there is also limited clarity on the profile, context and rationale for why people engage in gig work.[8] Consequently there is a potential gap between the rapid growth in gig workforce arrangements for Canadians and available policy supports, which suggests that understanding the needs of this growing workforce segment will be increasingly important to address.

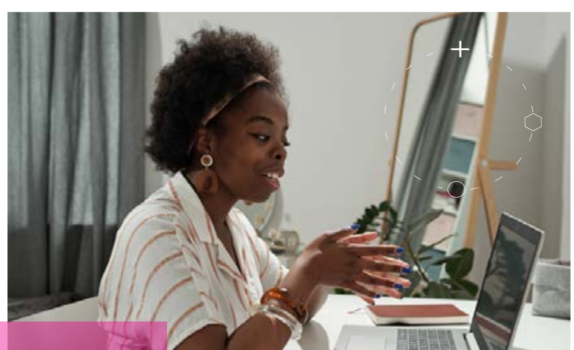
Gig work itself is commonly characterized by short-term, on-demand, and task-based labour, and overlaps closely with self-employed work, contingent work and freelancing.

## Research objective

Given that the motivations vary among individuals engaged in gig work, and that estimates of the makeup of this workforce also vary, our study aims to shed light on the current nature and quality of gig work in Canada. Fostering a better understanding of the motivations for and conditions within Canada's gig economy is critical to enabling informed and improved policy support for gig workers.

In essence, the reasons and motivations for gig work vary among participants, as do working conditions, available support, and earnings. To attempt to account for this varying context, the McKinsey Global Institute ('McKinsey') has proposed a classification for independent workers, which has been adapted by World Economic Forum ('WEF') to apply to gig work. This framework distinguishes the motivation for gig work into four categories:

1. **Free agents:** For whom gig work is the referred choice and the primary source of income.
2. **Casual earners:** For whom gig work is a personal choice and the supplemental source of income.
3. **Reluctants:** For whom gig work is conducted out of necessity and is the primary source of income.
4. **Financially strapped:** For whom gig work is conducted out of necessity to supplement an insufficient main source of income.



We suggest that this provides a useful framework to proxy the quality of work associated with various gig work arrangements; and in keeping, enables us to sufficiently distinguish the varying motivations for why Canadians engage in gig work. Most critically, gaining a better understanding of the size, demographic composition, and circumstances of each of these groups in Canada's labour market helps to inform potential policies that address the respective needs and requirements for each group. This is the primary goal of this study.

## Research project overview

Our research project approach comprises the following five major activities:

1. A literature review of the various drivers for and trends in gig work among OECD countries, as briefly summarized in **Appendix A.**
2. Analysis of empirical data on the scale and characteristics of the gig economy in Canada, including data from government sources such as *Labour Force Survey* microdata and Statistics Canada's Canadian Employer–Employee Dynamics Database.
3. A survey of Canadian gig workers to inform understanding of the composition of and motivation for gig work, based on a reasonable representation of Canada's current labour market stemming from (2). Our survey approach is further detailed below as it represents a new source of primary labour data on Canada's gig workforce.
4. Categorization and analysis of survey results from (3) by the McKinsey/WEF nomenclature to broadly summarize the motivation, working conditions, and demographic composition of gig workers in Canada's labour market. This approach helps further illuminate the composition of the gig workforce as well as how various gig workers may experience key quality of work indicators based on their specific context.
5. Outreach and final reporting throughout (1) to (4) to actively communicate findings on how Canadian gig workers "measure up" in terms of their constituency and the overall quality of work experienced. Based on the analysis of survey data and the initial results of the evaluations this report was prepared to share results and help inform initial directions for policy development in keeping with the quality of work circumstances experienced by Canadian gig workers. [§]

## Survey design

To get a better sense of the current size and demographic composition of Canadian gig workers, we commissioned Ipsos Reid ('Ipsos') to include the following question in their *eNation Canada Omnibus Survey*.

§ Over the research period, four consecutive and public-facing blog posts were issued that documented the findings and insights gained. These pieces were intended to communicate ongoing research and insights to policymakers, research entities, practitioners, and other public stakeholders in the skills/labour ecosystem, as well as private sector entities. Written pieces were created on the following subject areas:
1. Major gig economy trends identified for Canadian gig workers, *via* "Gig Work, Current Trends and Developments" issued on July 29, 2022.
2. Summary and analysis of Ominus Survey insights, *via* "The Demographics of Gig Work in Canada" issued on August 31, 2022.
3. Summary and initial analysis of Detailed Survey insights, *via* "Motivation for Gig Work in Canada", issued on November 1, 2022.
4. Exploration and initial analysis of skills utilization, per "The Skill Utilization of Gig Workers", issued on February 28, 2023, https://www.belongnomics.com/blog/6w6k4qdordwq3qr6jzmp5m12yzk617

*"In the past 12 months, have you earned income by providing services either full-time or part-time as an independent contractor or freelancer? This could include work conducted in person or through online platforms or apps (E.G. Upwork, Freelancer, Clickworker, PeoplePerHour, Uber, Skip The Dishes, Deliveroo, Handy, TaskRabbit and others). Sometimes this is referred to as 'gig work'."*

This sample represents 3,000 adult Canadians and was randomly selected from the Ipsos Online Panel. Data were weighted to ensure the sample's age and gender composition reflects that of the actual adult Canadian population according to Census data. Of the 3,000 people surveyed via the Omnibus, a total of 654, or 21%, answered 'Yes' to having undertaken gig work in the past 12 months. Having established the relative size of gig work, we then commissioned Ipsos to conduct a second, more comprehensive survey, tailored to gig workers in Canada. This survey comprised a sample size of 1,000 gig workers and was launched in October 2022. See **Appendix B** for survey question details.

Questions included demographic queries such as age range, educational level, resident status, income, gender and postal code/province, as well as questions intended to ascertain respondents' experience with gig work, as specified in **Appendix B.**

Of the 3,000 people surveyed, a total of 654, or 21%, have undertaken gig work in the past 12 months.

## Survey analysis

To establish a respondent's specific motivation for undertaking gig work, we included the following question in our survey: *"What is your main reason for doing/providing gig work?"*. Participants could choose among the following answers.

1. It is my preferred choice as a main source of income.
2. It is a personal choice to earn additional income.
3. It is my main source of income, but I would rather become a regular employee.
4. To earn additional income because my main income is insufficient.

To apply the McKinsey/WEF categorization, we interpret respondents answering (1) above to be 'Free Agents' for whom gig work is a preferred choice, respondents choosing (2) as 'Casual Earners', since gig work offers additional income, respondents answering (3) to be 'Reluctants', as these people would rather be employed, and respondents selecting (4) to be 'Financially Strapped' for whom gig work provides necessary additional income.

# Findings: Labour market demographics of Canadian gig workers

*Our findings suggest that 'Casual Earners' comprises the largest gig work constituency in Canada. Approximately 40% of respondents (from the survey taken among self-described gig workers) stated that they engage in gig work as a personal choice to earn additional income. The group of 'Financially Strapped' individuals is the second largest of these respondents at 29%, followed by 'Free Agents' (18%) and 'Reluctants' (14%).*

To shed light on the barriers and working conditions faced by these various groups, as well as their composition, we present results relating to demographic characteristics, type of gig work, and conditions experienced, as reported by survey respondents.

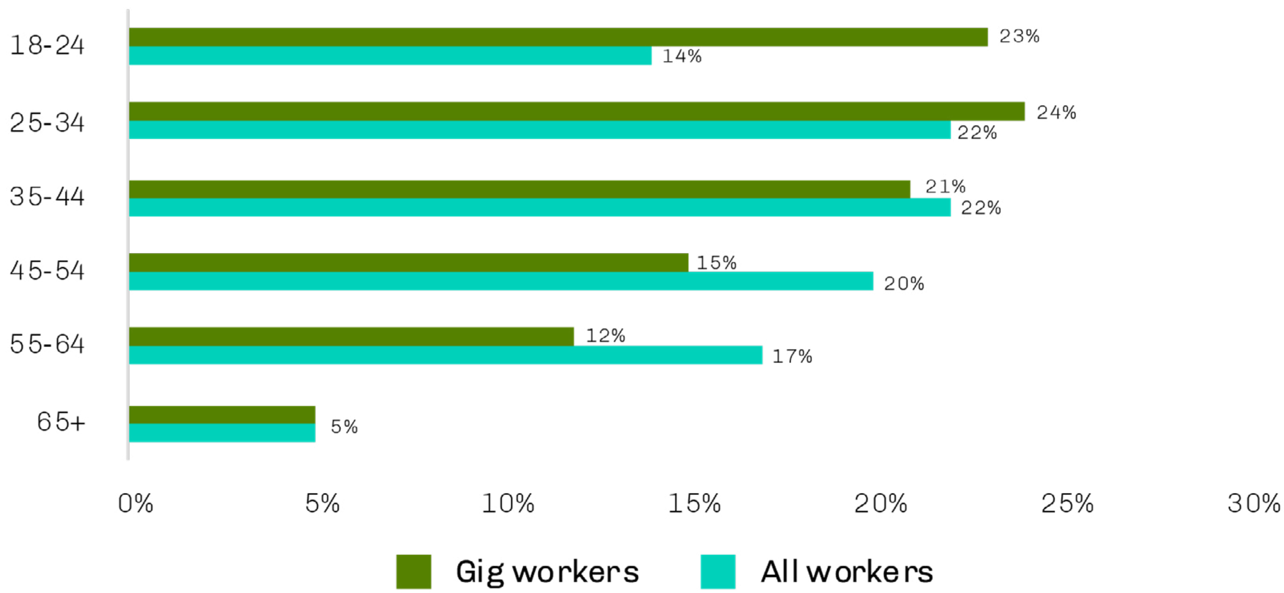
## 3.1 Demographic characteristics

**Figure 3.1** compares the age structure reported with that of Canada's total labour force in 2021.[9] As the chart shows, the age distribution among survey respondents of self-described gig workers is skewed to younger age cohorts: 18 to 34-year-olds make up almost half (47%) of the gig workforce, compared to the 36% this cohort makes up in the full labour force.[¶]

The share of workers aged 45 to 64 years-old is larger in the general labour force (37%) compared to their share among gig workers (27%). In the disaggregated data the share of gig workers we categorize as 'Reluctants' most significantly decreases with age, suggesting that 18 to 34-year-olds are specifically overrepresented in that group.

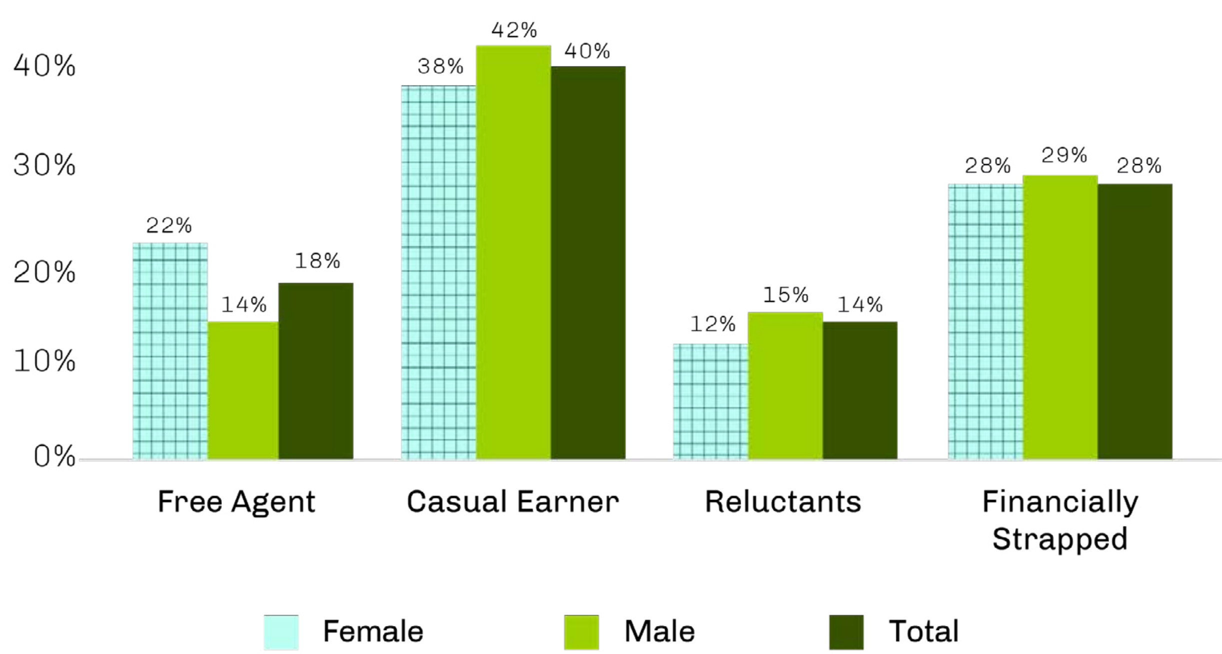
¶ Note: Statistics Canada uses 15 as the youngest working age whereas we applied 18 as the youngest age in our survey.

**FIGURE 3.1:**
Age cohorts in the general labour force vs. gig workers.



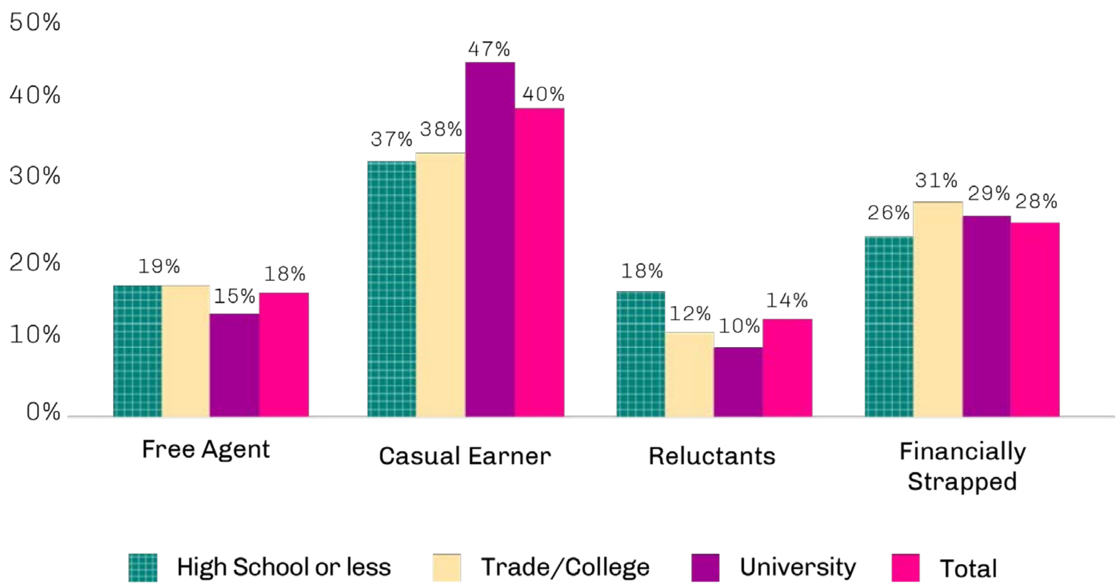

Turning to gender, it appears from our general data that more men (55%) than women (43%) engage in gig work, yet a closer look at the four categories of gig workers reveals some interesting differences. As **Figure 3.2** suggests, women are overrepresented among 'Free Agents', whereas male shares are slightly higher among 'Reluctants', 'Financially Strapped', and 'Casual Earners'.

**FIGURE 3.2:**
Gender by gig worker category.



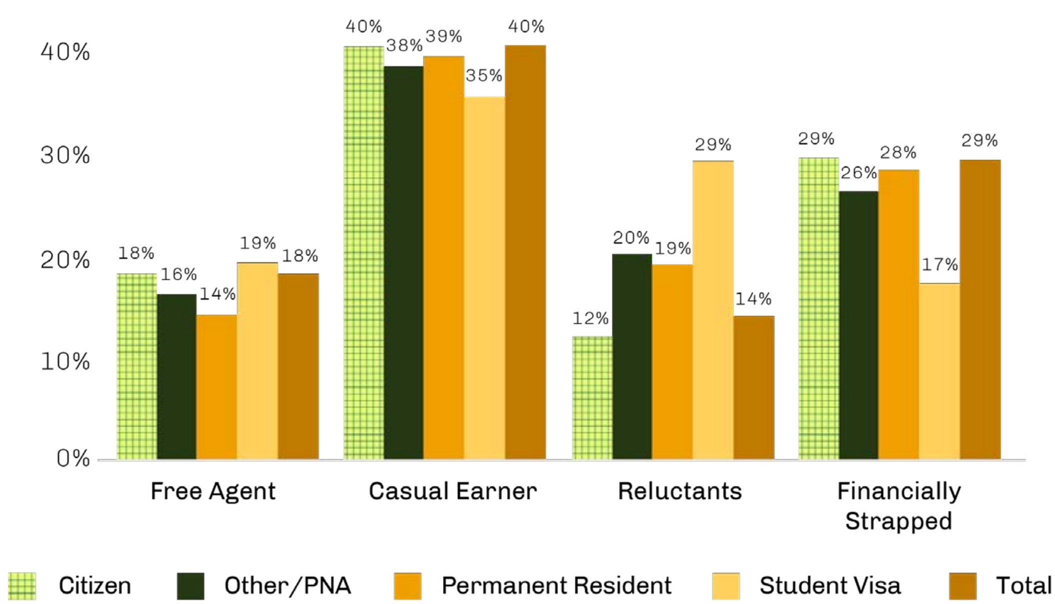
While we also observe some differences regarding educational attainment among the four gig worker categories (see **Figure 3.3**), these overall findings are aligned with a large study by McKinsey focusing on the United States and the European Union ('EU') which found that the level of educational attainment is not a significant indicator of participation in independent work.[10]

**FIGURE 3.3:**
**Educational attainment by gig worker category.**




In examining resident status, 'Reluctants' appear more likely to be on a student visa (29%), prefer not to answer (20%) or are permanent residents (19%), responses which indicate gig workers in this category are less likely to hold citizenship (**see Figure 3.4**). This suggests that one reason 'Reluctants' may struggle to find standard employment could be due to their resident status in Canada (e.g. new immigrants who do not yet hold citizenship but are permanent residents).

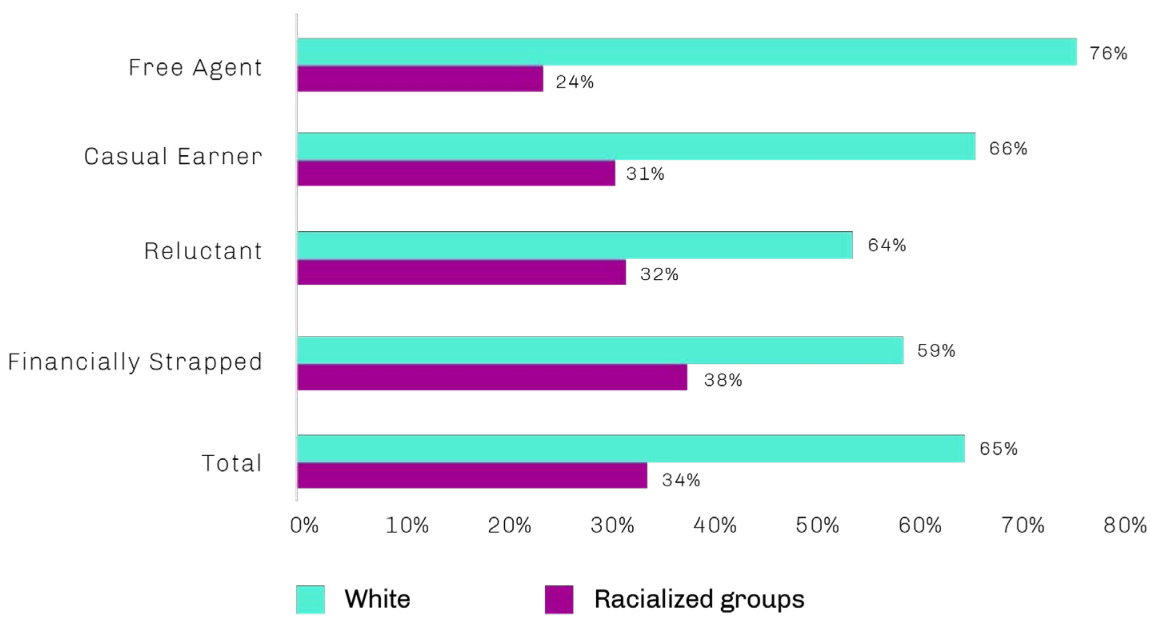
**FIGURE 3.4:**
**Resident status by gig worker category.**



A few things stand out in considering race. First, although those who identify as White make up 65% of total gig workers in Canada, they are overrepresented among ‘Free Agents’ (75%) and ‘Casual Earners’ (66%). Conversely, while racialized people account for around 34% of all gig workers in Canada, their share among ‘Free Agents’ is only 24% and they are overrepresented among the ‘Financially Strapped’ at 38% (**see Figure 3.5**).

From this data it appears that ‘Free Agents’ and ‘Casual Earners’ are more likely to be White, while ‘Reluctants’ and ‘Financially Strapped’ are more likely to include racialized groups. a more disaggregated look at racial composition shows that those who identify as Black account for around 6% of gig workers in Canada, yet their share among ‘Reluctants’ is 10%. Similarly, Latin Americans make up around 2% of gig workers in Canada; however their share among ‘Reluctants’ is 5%. In other words, racialized people appear to be overrepresented among ‘Reluctants’ and ‘Financially Strapped’.

**FIGURE 3.5:**
**Race by gig worker status.**

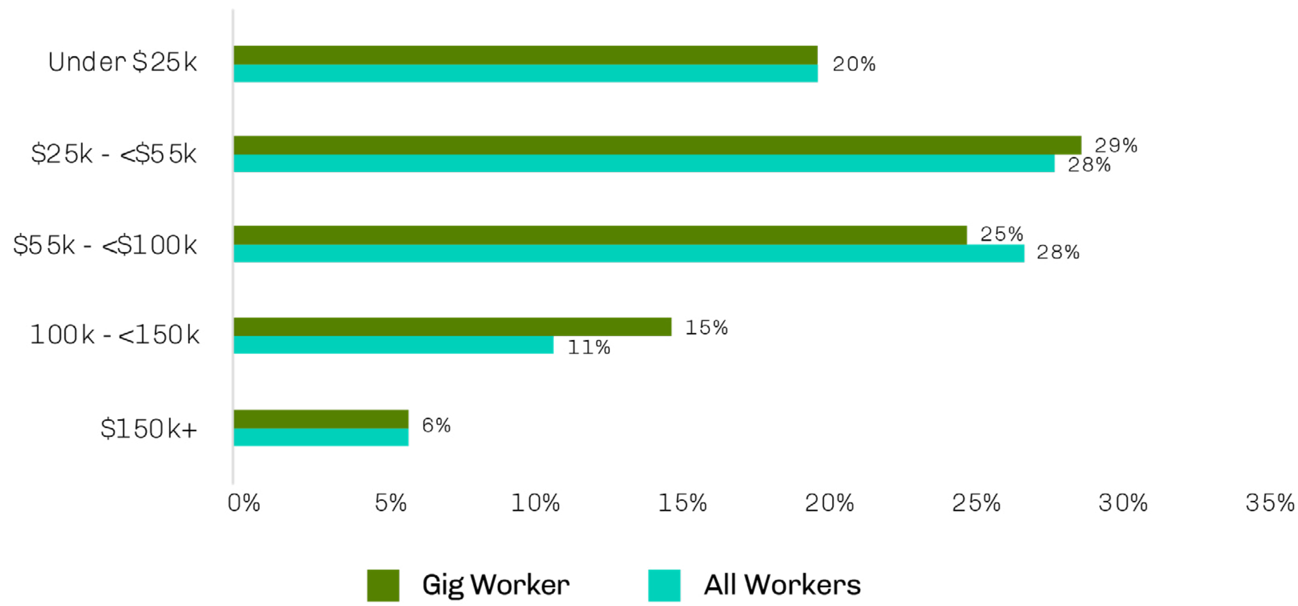



*Note: totals do not necessarily add up to 100% as some respondents did not give consent to use the information or preferred not to answer the question.*

Race-specific findings thus far indicate that youth, non-citizens and racialized Canadians appear to be overrepresented among ‘Reluctants’. Given that labour market integration is especially challenging for youth, racialized Canadians and recent immigrants, this could be one explanation for our result.[11]

Turning to income, **Figure 3.6** illustrates that the income distribution for gig workers closely follows the income distribution found in our Omnibus survey – the latter reflecting the distribution within the overall population.

**FIGURE 3.6:**
**Net household income by type of worker.**




*(% share, where "All Workers" refer to results from the Omnibus survey).*

Looking at gig workers only, **Table 3.1** shows that 'Reluctants' appear to be overrepresented in the lower income categories: 26% report a net household income below $25k compared to 20% of total gig workers. Similarly, 37% report a net household income of under $55k whereas that share is 29% among total gig workers. The results are somewhat mixed for 'Free Agents' and 'Financially Strapped'. In contrast, 'Casual Earners' appear to be more concentrated in middle- and higher-income categories.

**TABLE 3.1:**
**Net household income by type of gig worker (%).**

| **Household Income** | Total | Free Agent | Casual Earner | Reluctants | Financially Strapped |
|---|---|---|---|---|---|
| Under $25k | **20** | 22 | 15 | 26 | 22 |
| $25k - <$55k | **29** | 27 | 26 | 37 | 30 |
| $55k - <$75k | **13** | 15 | 15 | 12 | 11 |
| $75k - <$100k | **12** | 10 | 14 | 9 | 13 |
| $100k - <$150k | **15** | 10 | 18 | 9 | 18 |
| $150k+ | **6** | 7 | 9 | 3 | 3 |

*Colour shading scheme shifts at the $55K+ category.*

*Negatively overrepresented* *Total* *Positively overrepresented*

## 3.2 Type of gig work

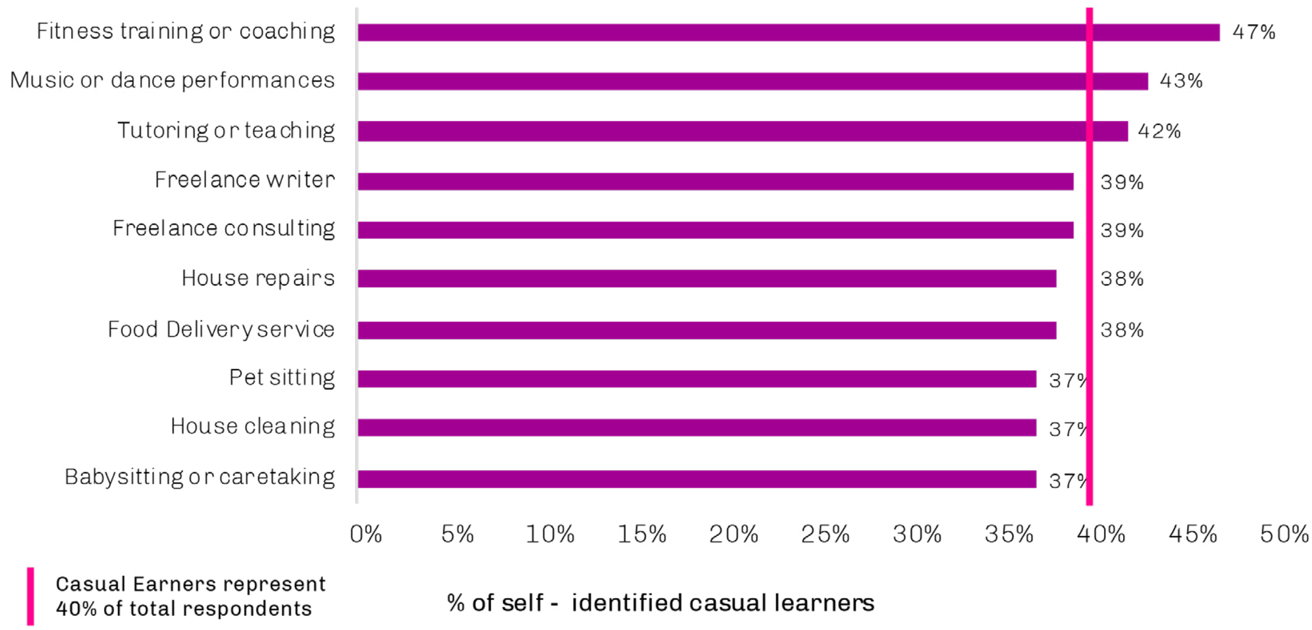
In this section we examine the type of gig work conducted by respondents to explore differences in barriers and working conditions, among other contextual factors.

As per **Figure 3.7,** ‘Free Agents’, which are 18% of all survey respondents, are more highly represented in videography (28%), programming or coding (25%), followed by house cleaning (23%), music or dance performances (22%) and house repairs (22%).

**FIGURE 3.7:**
**Main types of gig work - free agents.**

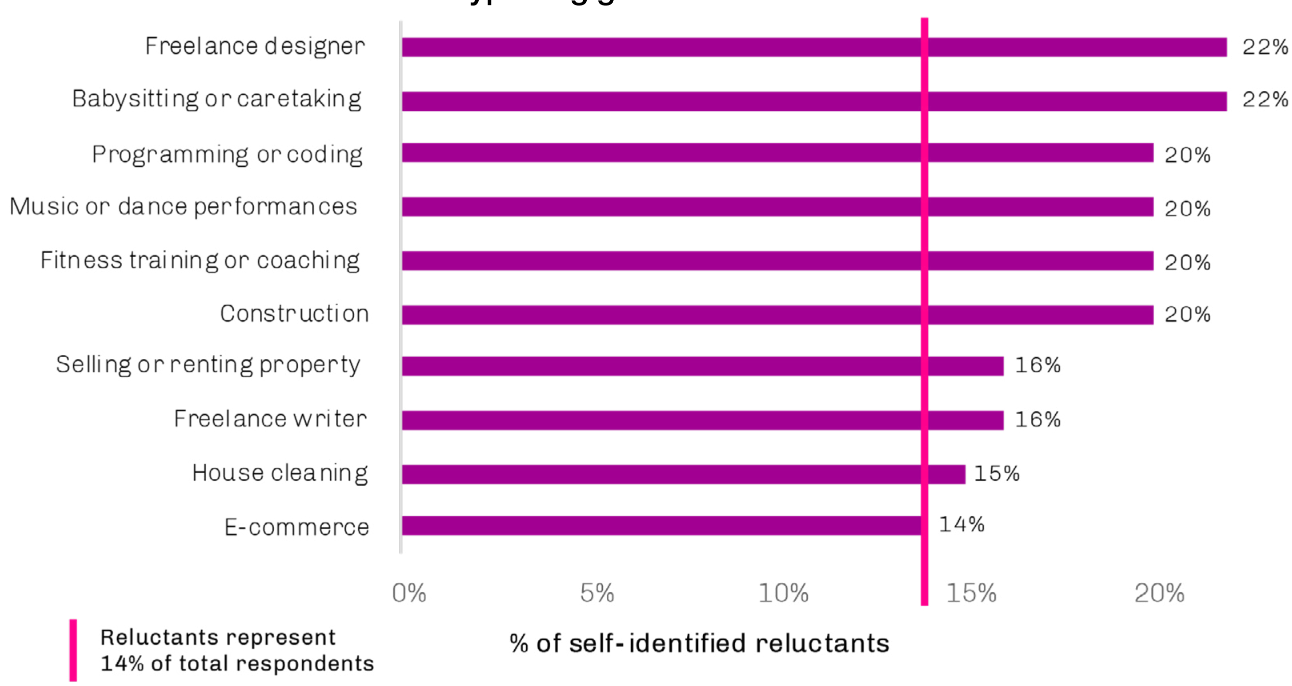

**Figure 3.8** shows the main types of gig work for ‘Casual Earners’. While this group makes up 40% of all respondents, that share is higher for those offering fitness training or coaching (47%), conducting music or dance performances (43%), and tutoring (42%).

**FIGURE 3.8:**
Main type of gig work - casual earners.



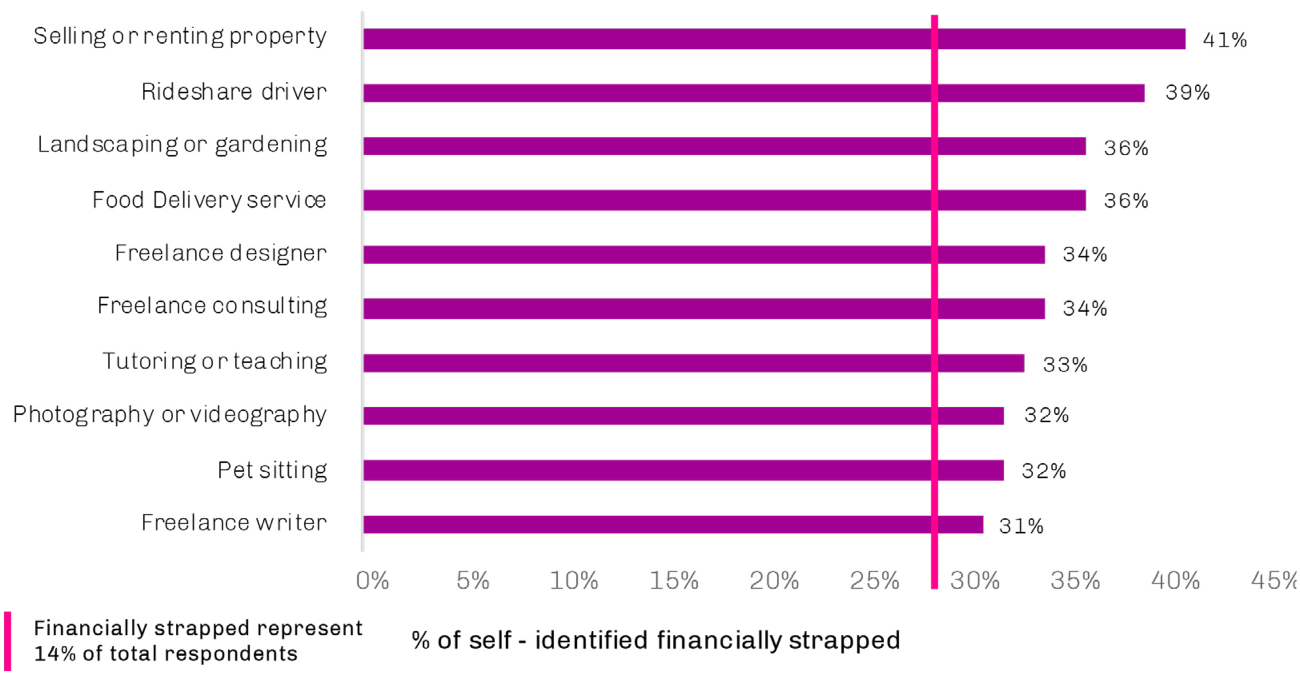

A total of 14% of survey respondents identify as 'Reluctants'. As **Figure 3.9** illustrates however, this share is higher among freelance designers (22%) and for babysitters and caretakers (22%). Similarly, it is relatively larger among those conducting programming or coding (20%), offering music or dance performances (20%), working as fitness trainers and coaches (20%) and in construction (20%).

**FIGURE 3.9:**
Main type of gig work - reluctants.



A total of 29% of survey respondents are 'Financially Strapped' however per **Figure 3.10**, this share is higher among those supporting selling or renting property (41%), rideshare drivers (39%), and among those offering landscaping or gardening services and food delivery (36%). Although rideshare and food delivery service types are often associated with "typical" gig work, being 'Financially Strapped' appears to be the predominant motivating factor for these occupations. Moreover, these occupations do not appear in the top ten for the other gig work categories.

**FIGURE 3.10:**
**Main types of gig work - financially strapped.**




## 3.3 Barriers experienced

To explore the barriers experienced by gig workers, we included the survey question "Which, if any, of the following barriers do you find most problematic in your gig work?". Responses collected are presented in Table 3.2, where Column 2 presents total survey responses for each barrier listed and Columns 3 to 6 show responses per category of gig worker.

These results indicate that 'Free Agents' perceive the lack of benefits and unemployment protection as larger barriers compared to the share reported for total responses. In contrast for 'Casual Earners', competition, lack of collective bargaining and poor working conditions appear to be more important. For 'Reluctants', competition, lack of collective bargaining, lack of retirement benefits, lack of unemployment protection, low pay and poor working conditions appear to be most significant. And for the 'Financially Strapped', all barriers aside from competition receive higher responses compared to total shares reported.

**TABLE 3.2:**
**Barriers by type of gig worker.**

| **Barrier** | Total | Free Agent | Casual Earner | Reluctants | Financially Strapped |
|---|---|---|---|---|---|
| *Competition* | **22** | 21 | 24 | 23 | 21 |
| *Lack of collective bargaining* | **11** | 9 | 12 | 12 | 12 |
| *Lack of disability benefits* | **19** | 20 | 15 | 18 | 25 |
| *Lack of employment injury benefits* | **20** | 25 | 16 | 20 | 24 |
| *Lack of retirement benefits* | **23** | 24 | 18 | 26 | 27 |
| *Lack of unemployment protection* | **23** | 26 | 19 | 27 | 24 |
| *Low pay* | **31** | 28 | 27 | 34 | 35 |
| *Poor working conditions* | **10** | 7 | 11 | 13 | 11 |

*Negatively overrepresented* *Total* *Positively overrepresented*

## 3.4 Working conditions reported

As we also sought to explore working conditions reported by gig workers, we asked survey participants the following question: “Do any of the following apply to the gig work that you conduct?”, followed by the list presented in **Table 3.3.**

**TABLE 3.3:**
**Working conditions by type of gig work.**

| **Working Conditions** | Total | Free Agent | Casual Earner | Reluctants | Financially Strapped |
|---|---|---|---|---|---|
| *Algorithmically controlled remote work (i.e. online work is remotely monitored)* | **10** | 9 | 8 | 16 | 11 |
| *Anti-social hours (for example, late at night)* | **18** | 15 | 18 | 12 | 23 |
| *High intensity work* | **17** | 20 | 14 | 20 | 18 |
| *Irregular hours* | **33** | 35 | 33 | 29 | 34 |
| *Poor/unsafe physical work environment/ physically demanding* | **11** | 12 | 10 | 12 | 11 |
| *Tight deadlines* | **19** | 18 | 17 | 22 | 21 |

*Negatively overrepresented* *Total* *Positively overrepresented*

As shown, ‘Free Agents’ and ‘Financially Strapped’ are more likely to encounter irregular hours in their gig work, whereas ‘Reluctants’ are more likely to encounter algorithmically controlled work as well as tight deadlines and high intensity work. ‘Financially Strapped’ appear to have a larger representation in jobs with anti-social hours. An additional interesting finding here is that there is no category in which ‘Casual Earners’ are overrepresented when compared to total responses by all gig workers.

The combined results regarding barriers and working conditions encountered suggest that policy responses to support gig workers should be tailored to their specific needs.

# Synthesis of findings

*The goal of our research is to establish the motivation, working conditions and demographic composition of the Canadian gig workforce. Our results - compiled in Table 4.1 below - indicate that people engage in gig work for various reasons. Almost 60% of gig workers in Canada can either be classified as 'Casual Earners' (40%) or 'Free Agents' (18%). In contrast, those engaged in gig work out of necessity account for around 42%, where 'Financially Strapped' make up 28% and 'Reluctants' 14%.*

Overall 'Reluctants' and 'Financially Strapped' appear to be the more vulnerable groups among gig workers: they tend to be younger, are more likely to belong to a visible minority group and less likely to hold Canadian citizenship. 'Reluctants' are also overrepresented among lower income groups and among Black and Latin America people.

While we find that in general more men (55%) than women (43%) engage in gig work in Canada, the share of women appears higher among 'Free Agents'. In contrast, male shares are slightly higher among 'Casual Earners', 'Reluctants' and 'Financially Strapped'. In line with previous studies on gig work, our results indicate that educational attainment does not appear to be a decisive factor for engaging in the gig economy.

Our survey results suggest that working conditions and barriers faced by gig workers depend largely on the type of gig work conducted. An interesting finding here is that while food delivery services (13%) and rideshare drivers (4%) account for relatively small shares of overall gig work in Canada, they are among the top five conducted by the 'Financially Strapped'.

As motivations to engage in gig work differ among gig workers, and since barriers and working conditions differ among various types of gig work, policies designed to support gig workers need to take these differences into account. In other words, it is unlikely that a one-size-fits-all approach to gig work would sufficiently address the needs of various types of gig workers. The following section considers some takeaways from our study and high-lights recent approaches with respect to policy solutions.

**TABLE 4.1:**
**Summary of quantitative findings.**

| *Parameter* | **Free Agent** | **Casual Earner** | **Reluctants** | **Financially Strapped** |
|---|---|---|---|---|
| *Definition* | *Gig work is a preferred choice and the primary source of income.* | *Gig work is a personal choice and provides supplemental income.* | *Gig work is out of necessity and is the primary source of income.* | *Gig work is out of necessity to supplement an insufficient main source of income.* |
| *Overall share of respondents* | **18%** | **40%** | **14%** | **29%** |
| **Age cohorts:** Casual earners have the greatest share of all the age cohorts, but cohort age concentration differs by McKinsey/WEF category. In comparison to the overall share of respondents noted by category above, ages 45 to 54 is highest in free agents, 65+ highest for casual earners, ages 35 - 44 for financially strapped and ages 18 - 24 for 'Reluctants'. | | | | |
| *18 - 24* | 18% | 40% | **19%** | 22% |
| *25 - 34* | 15% | 38% | **17%** | **30%** |
| *35 - 44* | 15% | 37% | 12% | **36%** |
| *45 - 54* | **24%** | 39% | 9% | 28% |
| *55 - 64* | **22%** | 39% | 10% | 29% |
| *65+* | 10% | **64%** | 4% | 22% |
| **Gender:** Women are overrepresented among 'Free Agents' whereas male shares are slightly higher among 'Reluctants', 'Financially Strapped', and 'Casual Earners'. 'Free Agents' are slightly more likely to be female while male shares are slightly higher in all other categories. | | | | |
| *Female* | **22%** | 38% | 12% | 28% |
| *Male* | 14% | **42%** | **15%** | **29%** |
| **Educational Attainment:** Although 'Casual Earners' account for 40% of gig workers in Canada, among workers with a university degree they make up 47%. Similarly, while 'Reluctants' account for 14% of all gig workers in Canada, among workers with high school or less they make up 18% - meaning that those whose highest educational attainment is high school or less is overrepresented in this group. | | | | |
| *High School or less* | **19%** | 37% | **18%** | **36%** |
| *Trade/College* | **19%** | 38% | 12% | 21% |
| *University* | 15% | **47%** | 10% | **39%** |
| **Resident Status:** It appears that those who are 'Reluctants' are more likely to be on a student visa (29%), prefer not to answer/other (20%) or are permanent residents (19%). In other words, gig workers in this category are less likely to hold citizenship. | | | | |
| Citizen | 18% | **40%** | 12% | **29%** |
| Permanent Resident | 14% | 39% | **19%** | 28% |
| Student Visa | **19%** | 35% | **29%** | 17% |
| Other / Prefer not to answer | 16% | 38% | **20%** | 26% |

| | | | | |
|---|---|---|---|---|
| **Race:** Although White people make up 65% of total gig workers in Canada, they are overrepresented among ‘Free Agents’ (75%) and ‘Casual Earners’ (66%). Racialized groups account for around 34% of all gig workers in Canada yet their share among ‘Free Agents’’ is only 24% and in contrast are overrepresented among ‘Financially Strapped’ at 38%. | | | | |
| Members of a Racialized Group (34% of survey) | 24% | 31% | 32%[*] | **38%** |
| White (65% of survey) | **76%** | **66%** | 64% | 59% |
| **Income:** Reluctants appear to be overrepresented in the lower income categories, i.e. below $25k and below $55k. Results are mixed for ‘Free Agents’ and ‘Financially Strapped’. Those reporting as ‘Financially Strapped’ are slightly overrepresented in the lower income categories. Yet, the shares of ‘Financially Strapped’ are also higher than the total share of gig workers in the $75k to below $100k and the $100k to below $150k categories. Similarly, there is no clear pattern with regard to ‘Free Agents’. | | | | |
| *Under $25k* | **22%** | 15% | **26%** | 22% |
| *$25k - <$55k* | **27%** | 26% | **37%** | **30%** |
| *$55k - <$75k* | 15% | 15% | 12% | 11% |
| *$75k - <$100k* | 10% | 14% | 9% | 13% |
| *$100k - <$150k* | 10% | 18% | 9% | 18% |
| *$150k+* | 7% | 9% | 3% | 3% |
| **Barriers:** Free agents perceive the lack of benefits and unemployment protection as larger barriers compared to the share in total responses for this question (noted in parentheses). For ‘Casual Earners’, competition, lack of collective bargaining and poor working conditions appear to be more important. Regarding ‘Reluctants’, competition, lack of collective bargaining, lack of retirement benefits, lack of unemployment protection, low pay and poor working conditions appear to be most significant. Among the financially strapped all barriers aside from competition receive higher responses compared to total shares. | | | | |
| *Competition (22%)* | 21% | **24%** | **23%** | 21% |
| *Lack of collective bargaining (11%)* | 9% | **12%** | **12%** | **12%** |
| *Lack of disability benefits (19%)* | **20%** | 15% | 18% | **25%** |
| *Lack of employment injury benefits (20%)* | **25%** | 16% | 20% | **24%** |
| *Lack of retirement benefits (23%)* | **24%** | 18% | **26%** | **27%** |
| *Lack of unemployment protection (23%)* | **26%** | 19% | **27%** | **24%** |
| *Low pay (31%)* | 28% | 27% | **34%** | **35%** |
| *Poor working conditions (10%)* | 7% | **11%** | **13%** | **11%** |

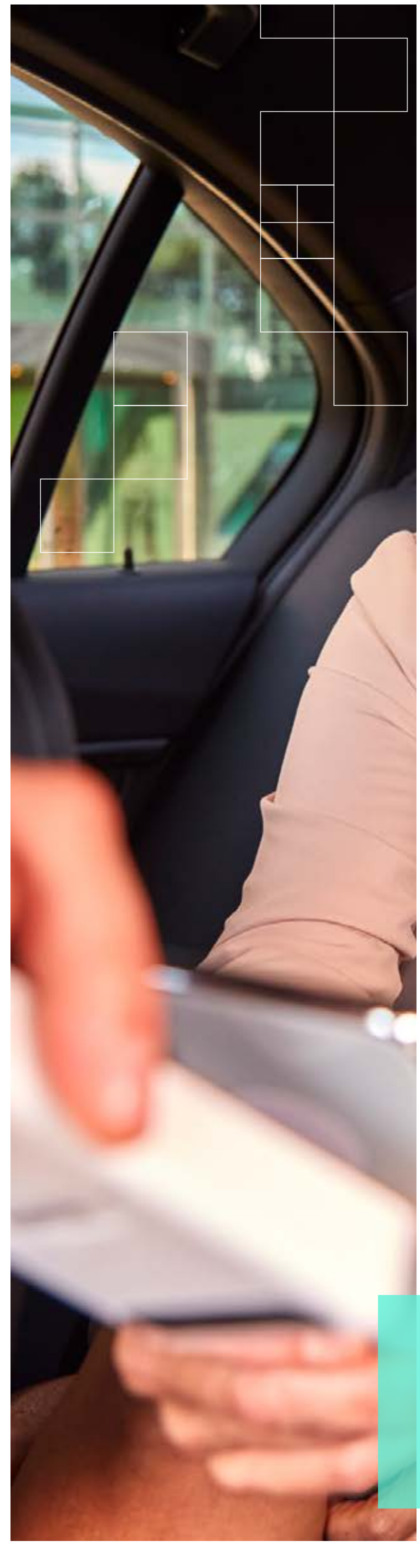
* Noting that Black and Latin American races are overrepresented in this category.

| | | | | |
|---|---|---|---|---|
| **Working Conditions:** Compared to the share in total responses for this question (noted in parentheses), 'Reluctants' are more likely to note algorithmically controlled work, high intensity work and tight deadlines as working conditions, whereas the 'Financially Strapped' report more conditions of anti-social hours. 'Free Agents' and 'Financially Strapped' are more likely to encounter irregular hours in their gig work. There is no category in which 'Casual Earners' are overrepresented. | | | | |
| Algorithmically controlled remote work (10%) | 9% | 8% | **16%** | **11%** |
| Anti-social hours (18%) | 15% | 18% | 12% | **23%** |
| High intensity work (17%) | **20%** | 14% | **20%** | **18%** |
| Irregular hours (33%) | **35%** | 33% | **29%** | **34%** |
| Poor/ unsafe/ physically demanding environment (11%) | **12%** | 10% | **12%** | 11% |
| Tight deadlines (18%) | 18% | 17% | **22%** | **21%** |

*Values shaded grey in the table indicate select parameters where the gig worker group is overrepresented in comparison to the baseline employed. The comparative baseline is largely based on the overall share of respondents, however in certain circumstances like race, barriers and working conditions a different comparative approach was used. This varied approach was employed so as to best align with the data format provided by the survey team.*

# Implications and future directions: towards supporting gig workers in Canada

*This study sought to further the understanding of the quality of work among Canadian gig workers. Our results suggest that the more vulnerable groups among gig workers, 'Reluctants' and 'Financially Strapped' account for roughly 43% of all gig workers in Canada. This is an important reminder that it would be incorrect to equate all forms of gig work with precarious work. While all gig workers would benefit from policy support, the type of support needed differs by type of gig worker.*



This underscores the need for policy solutions that specifically distinguish between these motivations to best address the barriers and experiences identified for each group. In this context, it might be helpful to apply the OECD framework on job quality, which uses the following three dimensions for evaluation:[13]

1. **Earnings quality**, which captures the extent to which earnings contribute to workers' well-being in terms of average earnings and their distribution across the workforce.
2. **Labour market security**, which captures those aspects of economic security related to the risks of job loss and its economic cost for workers, as further defined by the risks of unemployment and benefits received in case of unemployment.
3. **Quality of the working environment**, which captures non-economic aspects of jobs including the nature and content of the work performed, working-time arrangements and workplace relationships.[†]

Looking at the barriers and working conditions reported through the lens of this framework suggests that 'Free Agents' would mostly benefit from increased labour market security whereas 'Casual Earners' may benefit more through a strengthening of earnings quality. Based on our results, support for the 'Financially Strapped' should encompass all three dimensions of job quality, i.e. addressing earnings quality through increasing average earnings and enabling collective bargaining, fostering labour market security by enabling benefits payments, and improving the quality of the working environment by addressing anti-social and irregular hours.

With respect to the 'Financially Strapped', emerging policies in some United States (U.S.) states and the European Union could provide instructive lessons for Canadian policymakers.

† These are measured as incidence of job strain characterized as high job demands with low job resources.

- In Denmark, the trade union 3F has negotiated the world's first collective agreement in the platform economy with the Danish online platform, Hilfr.dk, which offers cleaning services. The platforms' freelance workers are reclassified as regular employees once they have completed at least 100 hours of work. As a result, they receive higher wages and social protection.[14]
- In Germany, the Künstlersozialversicherung provides performing artists and publicists with social insurance. The money is collected through a contribution on total contract value paid by the employer of the gig worker. The contribution is complemented by workers' contributions if earnings exceed a certain level and a subsidy paid by the government.
- In the U.S., New York State created the Black Car Fund - a non-profit organization providing benefits to rideshare drivers. From every rideshare fare, 2.5% is allocated to the fund, which then provides health benefits and workers' compensation to rideshare drivers in the state. California and, more recently, Washington state have also passed legislation providing a guaranteed earnings floor, health benefits and workers' compensation for rideshare drivers.[15]
- In a more worker-centric approach, researchers at the MIT Media Lab are aiming to empower gig workers by enabling access to aggregate data on their pay and working conditions. The intent is to allow workers to collect, aggregate and share data on wages and working conditions for a particular type of gig work. The data can also be shared with advocates, worker-organizers, and researchers. This approach is intended to increase transparency about gig work conditions and would support gig workers in advocating for their own goals.[16]

Parallel Canadian developments vary considerably; however, recent announcements warrant closer attention. For example, Uber Canada, a subsidiary of the ride-hailing company, recently reached an agreement with the United Food and Commercial Workers International Union ('UFCW'), a U.S.-based labour organization with members in Canada, to offer representation for Uber employees in disputes with the company. The expenses for this service are covered by Uber and there is no presence of a collective agreement, collective bargaining or industrial action in this relationship. The arrangement has been met with criticism by other labour unions, who view it as a maneuver by Uber to prevent the establishment of genuine representation for its Canadian drivers and couriers.[17]

Also of note is the passage of Bill 88 by the Government of Ontario, or the "Working for Workers Act", which sets minimum labour standards for gig workers. Bill 88 aims to provide minimum wage, information on pay calculation, notice for removal, and dispute resolution mechanisms to platform workers. This bill has been criticized by Gig Workers United, a community union in a labour partnership with the Canadian Union of Postal Workers. For one, platform companies are only required to pay minimum work for assignment time, so actual earnings remain below the minimum wage. Moreover, the workers' group maintains that the bill does nothing to improve working conditions since it does not address the issue of gig workers being classified as 'independent contractors',

Public policy can play a critical role in promoting skills-based hiring rather than just their educational background or prior work experience.

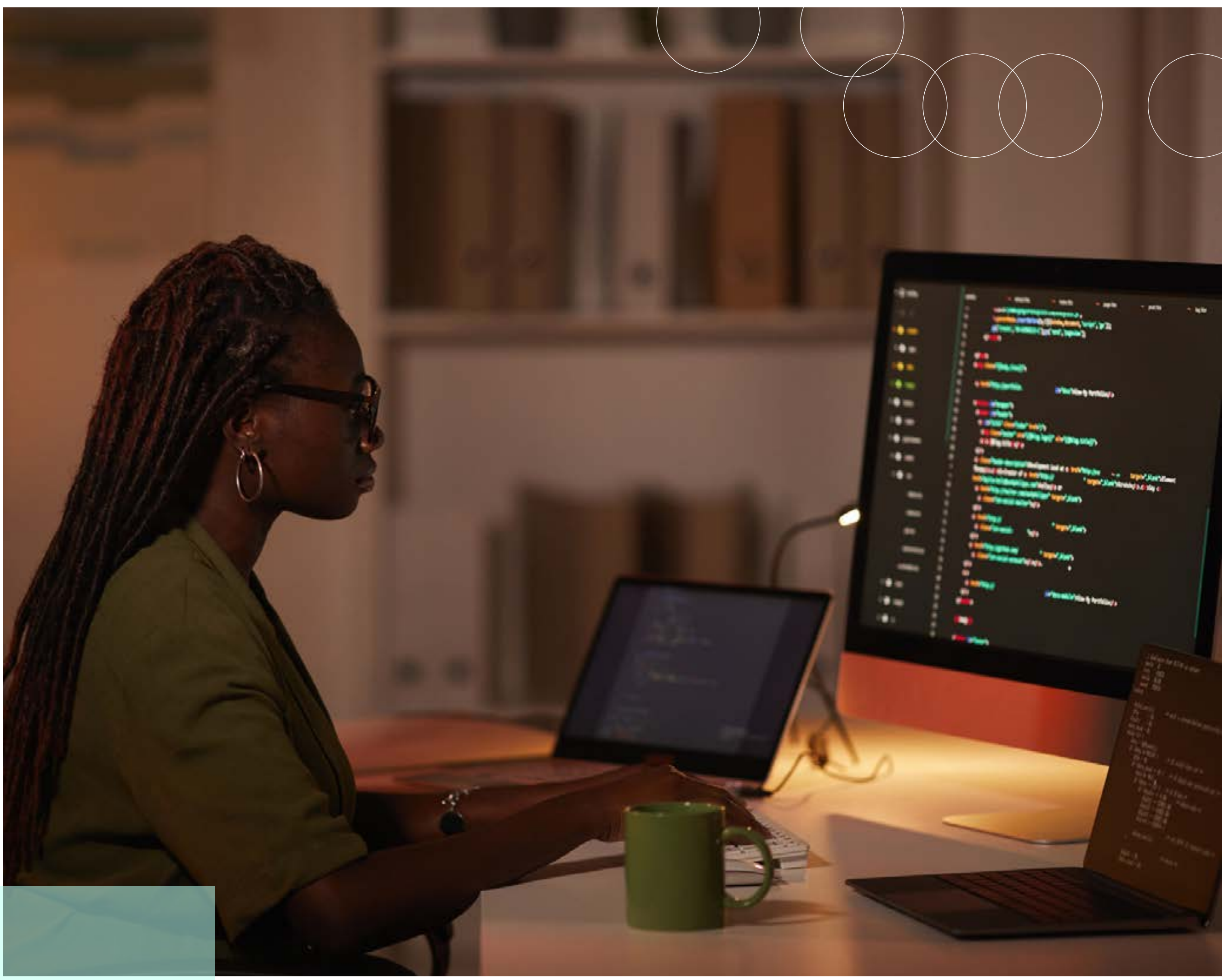
making them ineligible for benefits, paid vacations or parental leave. The group also views with suspicion the government's plan to introduce a pilot project for portable benefits, claiming that similar projects in other jurisdictions have shown that benefits remain mostly inaccessible for workers when they need them.[18]

The picture that emerges for 'Reluctants' is that of a group of people that may have less access to or understanding of available supports, may have less formal educational achievement, less financial means, and are overrepresented in terms of youth, recent immigrants and racialized Canadians. The fact that these individuals indicate they only participate in gig work because they are unable to obtain regular employment suggests that the best policy objective would consist of identifying and removing labour market barriers for youth, recent immigrants and racialized Canadians. This group might further benefit from a closer examination of skills matching and, where necessary, improved labour market information with regard to upskilling and training opportunities. The improvement of job sites in terms of skills matching suggests that a skills-focused hiring strategy may mitigate the impact of hiring biases resulting from personal networks and an emphasis on credentials, which would traditionally work against this group. Furthermore, the ongoing issue of labour shortages highlights the need for a greater emphasis on transferable skills and on-the-job training.

Public policy can play a critical role in promoting skills-based hiring, which refers to the practice of selecting employees based on their skills and abilities, rather than just their educational background or prior work experience.[19] In Canada, the Job Grant Program – a federal initiative that provides funding to employers to support the training of new and current employees – is one example. Similarly, the Canada Job Fund Agreements provide funding to provinces and territories to support employment and training programs. These programs aim to help workers acquire skills that are in demand by employers and to improve the match between workers' skills and workforce needs. With regard to youth, the innovative work-integrated learning (I-WIL) initiative provides funding to colleges, universities, and other organizations to support experiential learning opportunities for students and recent graduates. These opportunities help connect students with employers and provide them with the skills and experience they need to succeed in the workforce. Finally, the Federal-Provincial-Territorial Council of Ministers Responsible for Labour Market Development provides access to labour market information, including data on the skills that are in demand by employers. This information can help employers and employees to make informed decisions with respect to skills-based hiring.

Yet, it appears that some of these policies still face challenges in reducing labour market barriers, particularly for certain groups of workers, such as youth, Indigenous peoples, newcomers and individuals with disabilities. A recent study by the Canadian Centre for Policy Alternatives found that these groups continue to face significant obstacles to employment, including discrimination, lack of access to education and training, and low levels of labour market attachment. This indicates that existing policies need improvement specifically to support the more vulnerable groups.

As the above examples show, efforts are underway in several jurisdictions to strengthen gig workers' bargaining power or to provide benefits similar to those common in traditional work arrangements. These international efforts can provide valuable lessons to tailor and improve policy support for gig workers in Canada. We suggest that the research conducted herein presents a helpful base to explore such targeted solutions further, and that the findings, particularly those for the more vulnerable gig worker groups in Canada, should thus help inform and improve policy support.



# Appendix A: Summary of literature review

## A.1 What is a gig worker?

There are several challenges with evaluating gig work, which include but are not limited to inconsistencies in how gig work is defined, making it difficult to understand what it is, how to measure it and how to determine its impact on workers and society.[20] Definitions can vary significantly as at times they invoke a time, autonomy or task aspect,[‡] whereas at others they focus on the explicit nature of the contractual arrangement.[§] Still other categorizations specifically employed in the Canadian context include frameworks based on work characteristics, such as by Abraham et al. (2018), who identify gig workers by the type of work arrangements, a categorization also employed by Statistics Canada.[21] Similarly, a recent report by the Diversity Institute points out that gig work is characterized by two broadly shared attributes in that such work is less structured compared to standard employment, and the nature of the work is temporary, on-demand and loosely attached to the labour market.[22]

The term gig work is also often conflated with other terms, such as "precarious work" or contract work. Per the Labour Market Information Council ('LMIC'), "such confusion is apt to result in ineffective or adverse policy responses". The LMIC identifies four common approaches used to describe gig work, as follows. These approaches are not mutually exclusive and in fact sometimes overlap, creating further challenges to understanding gig work.

- Online interfaces (i.e., work mediated via digital platforms).
- The legal-contractual component (i.e., the formal relationship between the payor and payee).
- Work characteristics (i.e., specific features of the job, such as scheduling, remuneration and job tasks).
- Combination (i.e. work is of short or uncertain duration and characterized by task-based payment, irregular schedules and irregular income, including platform-enabled work).[23]

Notably, Statistics Canada is currently working to develop a coherent framework for defining and collecting information on gig employment that is consistent with the International Classification of Status in Employment.[24]

‡ Examples of these include;
  - A 2016 McKinsey Global Institute Report, which defines gig work/"independent work" as: (a) a job of short duration; (b) with the worker having a high level of control and autonomy; (c) being paid by task, assignment or sales.
  - The European Gig Economy Survey, which defines a gig worker as "someone working at least once a week." The circumstances of those employed in gig work ranged from students seeking petty cash and stay-at-home moms to full-time workers wanting to supplement their income. This survey was conducted in seven countries: Austria, Germany, Italy, the Netherlands, Sweden, Switzerland and the UK.

§ Still other definitions include those that explore the overlap between three areas, such as the U.S.Gig Economy Data Hub (which defines gig work as:
  - Alternative/non-standard work arrangements including freelancing, temp agency work, self-employment and subcontracted work.
  - Independent contractors performing a service for a company without being a direct employee, whereby payroll taxes aren't deducted and neither party is bound by the rules and regulations applying to traditional employees.
  - Type of work based on the "nature of work", what a worker does on a day-to-day basis, exploring job characteristics such as scheduling, flexibility and lack of direct oversight.

## A.2 Gig workers: General trends in OECD countries

Results from an initial scan of literature relating to gig work in OECD countries found that there are limited precise figures on the number of gig workers due to (1) a lack of official documented statistics, (2) the unregulated nature of “invisible” grey/black economy platforms, and (3) the distinction between platform-based workers vs. the actual number of workers.

Despite the paucity of official statistics and the complexity of estimating this population, a large 2016 survey of 8,000 individuals found that from 20 to 30% of the population in the U.S. and the EU-15 (up to 162 million individuals) enlist in “independent work”.[25] Gig work is also growing worldwide; annual figures are consistently in the double-digits as per the Online Labour Index, with predictions of 17% annual growth from 2018 to 2023.

Major trends noted for this workforce tend to concentrate on the growth in online platforms and increasing attention to defining gig worker rights, including the development of support and legislation for partial or portable benefits. For example, it has been predicted that by 2025, one-third of all labour transactions will be mediated by platforms – this projection is borne out by research by the International Labour Organization, which found that the number of online web-based and location-based platforms rose from 142 in 2010 to over 777 in 2020. Of these, online web-based platforms tripled, while taxi and delivery platforms grew nearly tenfold, with most concentrated in the U.S. (29%), India (8%) and the U.K.(5%).

Several trends are also in play regarding defining gig worker rights and benefits. While gig worker legal status and classification varies across OECD countries, in North America the development of Proposition 22 in California has drawn particular attention and is under exploration by states such as Massachusetts and Washington. Despite an initial attempt to regulate workers as employees, Proposition 22 allows larger-scale platform-based companies to classify their workers as “independent contractors” instead of as employees. This exempts companies like *Lyft, Uber* and *DoorDash* from providing complete mandated employee benefits. Still other regions such as New York are exploring letting application-based workers form unions, which could then engage in sectoral bargaining to set industry-wide standards.

Although the reviewed literature signals some potential steps forward when it comes to recognizing gig worker rights and consequent benefits, we note that such developments do not necessarily apply widely to all gig worker segments, and much of the focus to date in North America has been on higher profile and platform-based services such as rideshare and food delivery.

## A.3 Developing a Gig Worker “quality of work” taxonomy

Data suggest that gig work is growing not only in Canada but also in the global economy. However, the motivations and/or necessity of why people turn to gig work is not well understood, nor how these work arrangements influence or impact an individual’s quality of life.

Drawing on Statistics Canada's Canadian Employer–Employee Dynamics Database ('CEEDD'), Ziegler et al. (2020) ascertained that in Canada more women than men turn to gig work and that gig work is highest in the 65+ age category.[26] Empirical evidence on earnings is less clear. While it appears that the average gig worker in Canada earns less than the median family income, some empirical findings seem to suggest that Canada's gig workers are among the highest paid in OECD countries (though the international comparison reviewed only occupations where assignments could be completed in three days or less).[27] Further complicating the picture is the rapid proliferation in large-scale platform-based entities (i.e. Uber, Airbnb), concerns and activities around unionization, and the increase in satellite and remote work contracting arrangements as precipitated by the COVID-19 pandemic.

In essence, the reasons and motivations for gig work vary among participants, as do working conditions, available support and earnings. To attempt to account for this and as previously introduced within this report, McKinsey/the World Economic Forum ('WEF') distinguishes the motivation for gig work by four main categories:

1. **Free agents:** Where gig work is an individual's preferred choice and their primary source of income.
2. **Casual earners:** Which refers to those for whom gig work is a personal choice and the resulting income provides supplemental income.
3. **Reluctants:** For whom gig work is conducted out of necessity and is the primary source of income.
4. **Financially strapped:** This group participates in gig work out of necessity in order to supplement an insufficient main source of income.

The above taxonomy provides a useful framework to proxy the quality of work associated with various gig work arrangements, which is critical to help inform potential policies that address the respective needs and requirements for each group.

# Appendix B: Detailed survey questions

## Questionnaire

By participating in this online survey you are indicating that you have read the text **[insert hyperlink to above text here]** regarding the nature and the purpose of this online survey. You are free to withdraw from the survey at any time.

As mentioned above, some questions in this survey will be about race, gender, income, education, resident status and age.  A “Prefer not to answer” option will be available for you to select, if the case.

1. Do you accept the collection of personal age, race, gender, income, education, resident status and age related data?

   Yes, I accept

   No, I do not accept

**[If yes continue, if no Thank and Terminate]**

2. In the past 12 months, have you earned income by providing services either full-time or part-time as an independent contractor or freelancer? This could include work conducted in person or through online platforms or apps (E.G. Upwork, Freelancer, Clickworker, PeoplePerHour, Uber, Skip The Dishes, Deliveroo, Handy, TaskRabbit and others). Sometimes this is referred to as ‘gig work’.

   Yes

   No

**[If yes continue, if no Thank and Terminate]**

## Profile of Gig Workers

3. Approximately how many hours per work do you work or provide work as a gig worker?

   [Range 1 to 99]

4. What type of gig work do you perform? (select all that apply) If the type of work you conduct is not included in the list below please specify.

   [Randomize]

   Babysitting or caretaking

   Construction

   Food Delivery service (e.g. Uber Eats, Skip The Dishes)

   E-commerce

Fitness training or coaching

Freelance consulting

Freelance designer

Freelance writer

House cleaning

House repairs

Landscaping or gardening

Music or dance performances

Pet sitting

Photography or videography

Rideshare driver (e.g. Uber, Lyft)

Selling or renting property

Tutoring or teaching

Other (specify)

5. How do you obtain your gig work?

   Through an app or an online platform

   Other (please explain)

6. Is gig work your main source of income or a secondary source of income (meaning that you have another job)?

   Gig work is my primary source of income

   Gig work is a secondary source of income, as I have another job

7. Are you currently employed in a full-time or part-time salaried job (where you receive a regular paycheck and a T4 for income tax purposes) that is not your gig work job?

   Yes, I work as a full-time employee at a salaried job

   Yes, I work as a part-time employee at a salaried job

   Yes, I work as both a full-time and part-time employee at a salaried job

   No

**[If yes to any in Q7 ask Q8 to Q10]**

8. Approximately how many hours per week do you currently work as a salaried part-time or full-time job (not including the gig-work you conduct)?

   [Range 1 to 99]

9. Which one of the following categories best describes the industry in which you currently work as a salaried part-time or full-time job (not including the gig work that you conduct)?

Agriculture, forestry, fishing and hunting

Mining, quarrying and oil and gas extraction

Utilities (hydro, electricity, telecommunications, gas, etc.)

Construction (Industrial, Commercial, Institutional, Residential, or Engineering)

Manufacturing (anything being made or fabricated)

Wholesale trade (supplying to the retail trade)

Retail trade (selling to the public)

Transportation and warehousing (logistics, deliveries, etc.)

Information and cultural industries (IT, communications, performing arts, etc.)

Finance and insurance (bank, insurance, financial services, etc.)

Real estate and rental leasing (selling buying properties, property management, etc.)

Professional, scientific and technical services (architect, engineering, design, HR, advertising)

Management of companies and enterprises (holding companies)

Administrative and support, waste management and remediation (office admin, travel, cleaning, etc.)

Educational services (teaching, educational support, etc.)

Health care and social assistance (hospitals, medical offices, social workers)

Arts, entertainment and recreation (actors, stage professionals, sports coaches)

Accommodation and food services (hotels, catering, etc.)

Government & public administration

Other (Specify)

10. Does your current salaried job provide any of the following benefits?

[Randomize]

EI contribution

Pension contribution

Disability

Health benefits

Other (specify) **[Anchor]**

None of the above **[Anchor]**

**[If no in Q7 ask Q11]**

11. Have you ever been employed in a full-time or part-time salaried job (where you receive a regular paycheck and a T4 for income tax purposes) that is not your gig work job?

    Yes

    No

## Attitudinal questions

12. What is your main reason for doing/providing gig work?

    [Randomize]

    It is my preferred choice as a main source of income

    It is a personal choice to earn additional income

    It is my main source of income, but I would rather become a regular employee

    To earn additional income because my main income is insufficient

13. Which, if any, of the following aspects of gig work do you like?

    [Randomize]

    Flexible hours

    Choose when to work

    Ability to work as much as I want

    Enjoy the type of work

    Other (specify) **[Anchor]**

    None of the above **[Anchor]**

14. Which, if any, of the following barriers do you find most problematic in your gig work? (select all that apply)

    [Randomize]

    Low pay

    Lack of unemployment protection

    Lack of disability benefits

    Lack of employment injury benefits

Lack of retirement benefits

Lack of collective bargaining

Poor working conditions

Competition

Other (specify) **[Anchor]**

None of the above **[Anchor]**

15. If you have selected ‘poor working conditions, do any of the ones listed below apply to your situation?

[Randomize]

Irregular hours

Anti-social hours (for example, late at night)

High intensity work

Tight deadlines

Algorithmically controlled remote work (i.e. online work is remotely monitored)

Poor/unsafe physical work environment/ physically demanding

None of the above

## Demographic Questions

16. Do you accept the collection of data related to how you identify as part of different population groups (questions to follow)? As a reminder: Data collected as part of this survey will not be stored beyond 12 months.

Yes, I accept

No, I don’t accept

**[If Yes continue, else skip to Q19]**

17. Are you an Indigenous person, that is, First Nations (North American Indian), Metis or Inuk (Inuit)? If “Yes” choose the option(s) that best describe you. First Nations (North American Indian) includes both Status and Non-Status Indians.

No, not an Indigenous person

Yes, First Nations (North American Indian)

Yes, Metis

Yes, Inuk (Inuit)

Prefer not to answer

18. Are you (mark more than one option or specify, if applicable)

    White
    Latin American
    Arab
    Southeast Asian (e.g. Vietnamese, Cambodian, Laotian, Thai etc.)
    South Asian (e.g. East Indian, Pakistani, Sri Lankan, etc.)
    West Asian (e.g. Iranian, Afghan, etc.)
    Black
    Chinese
    Filipino
    Korean
    Japanese
    Other (specify)
    Prefer not to answer

19. What is your resident status in Canada?

    Citizen
    Permanent resident
    Student visa
    Other
    Prefer not to answer

20. What is the highest degree or level of school you have completed?

    Primary school or less
    Some high school
    Graduated high school
    Some college / CEGEP / Trade School
    Graduated from college / CEGEP / Trade School
    Some university, but did not finish
    University undergraduate degree
    University graduate degree
    Prefer not to answer

21. Please indicate your annual household income before taxes

Less than $5,000

$5,000 - $9,999

$10,000 - $14,999

$15,000 - $19,999

$20,000 – $24,999

$25,000 – $29,999

$30,000 - $34,999

$35,000 - $39,999

$40,000 - $44,999

$50,000 - $54,999

$55,000 - $59,999

$60,000-$64,999

$65,000-$69,999

$70,000-$74,999

$75,000-$79,999

$80,000-$89,999

$90,000-$99,999

$100,000-$124,999

$125,000-$149,999

$150,000-$199,999

$200,000-$249,999

$250,000 or more

Prefer not to answer

# Endnotes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