



# LOADING

THE FUTURE OF WORK

*Worldwide Remote Work Experimentation  
and the Evolution of the Platform Economy*



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Research by



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Canada 

# Preface

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ICTC is a national centre of expertise on the digital economy. With over 25 years of experience in research and program development related to technology, ICTC has the vision of strengthening Canada's digital advantage in the global economy. Through forward-looking research, evidence-based policy advice, and creative capacity building programs, ICTC fosters innovative and globally competitive Canadian industries, empowered by a talented and diverse workforce.

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

# Abstract

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This study examines key concepts related to the future of work. This research offers a historical overview of remote work, the gig economy, and the sharing economy, depicting their evolution as disruptors to the “traditional” labour market and economy. Key concepts related to these developments include the uptake of remote work, digital platforms facilitating gig work, the nature of high-skilled vs. lower-skilled gig work in Canada and internationally, global competition and generational trends in gig work, regulatory needs, along with the growth of the sharing economy and essential platforms that drive use and consumer demand.

The outbreak of the COVID-19 pandemic in 2020 has undoubtedly caused ripples across the gig economy and the sharing economy while shifting mass remote work from a possibility to a need. In March 2020, countries around the world began transitioning their businesses and employees from in-person in-office structures to remote operations. While COVID-19 has been a catalyst for mass remote work experimentation, it has also raised important questions about the challenges of remote work, precarious gig employment, regulatory needs of both the sharing and gig economy, and growing class divides and socioeconomic fissures between those capable of remote work and those who are not.

This study was completed in May 2020. While it forms a foundational structure upon which to continue to analyze the evolution of the future of work, more research will be required to fully explore the impacts of COVID-19 on the gig economy and the sharing economy. ICTC will continue tracking trends, analyzing not only COVID-19’s implications for the economy and labour market but also the emergence and adoption of key technologies that will support the future of work in a period of economic recovery.

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# Glossary

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**Casual Work (aka Contract Work or Contingent Work)** Most commonly denotes an employment relationship with limited job security. Can be part-time with variable hours: i.e. non-permanent work. In its narrowest definition, this can include consultants, freelancers, independent contractors, and temporary contract workers.

**Contract Employee** An employee that works in a traditional full or part-time position and is, under many legal considerations, identical to a permanent employee. However, unlike a permanent employee, the employee's employment will only last (providing satisfactory performance) until the end of a predetermined contract.

**Contractor (Independent Contractor)** A person, business, or corporation that provides goods or services under a written contract or verbal agreement. Unlike an employee, independent contractors do not work regularly for an employer but work as required and are paid on a freelance basis. Contractors may work through a limited company, franchise, or umbrella company.

**Consultant** 1) A form of independent employee hired to provide expertise in a certain area, typically for a business in a sector that the consultant has worked as a traditional employee. Consultants of this kind tend to be seasoned professionals and may pursue consulting work on a full-time or a part-time basis. 2) A hired employee of a dedicated "consulting firm" which specializes in providing expertise in a given area.

**Digital Platform Economy** An economy based heavily on relationships created through digital platforms, including websites, applications, or social media. Digital platforms facilitate interaction and relationship building (for some dating applications, such as Tinder, the relationship is itself the value), but most platforms match providers of services with potential buyers (such as Uber or Airbnb).

**Freelancer** Typically denotes an independently employed professional, often in a creative or technical field. In contrast to "gig employees," freelancers typically work on longer contracts and are more likely to be independently managed.

**Flexible Workforce** A workforce encompassing a range of alternative work arrangement and policies, including flex time, working from home, and temporary and informal employment.

**Future of Work** A catch-all term evoking the transformation of the labour market as a function of technological and social trends. It often refers to continuing developments in the nature of work and employment.

**Gig** A short-term employment arrangement. Gigs, as defined now, have existed for centuries. They were the dominant form of employment for non-agricultural workers until the Industrial Revolution, which saw a migration of skilled labour and the development of traditional, fixed-place workplaces. The origin of the term, however, comes from the music profession.

**Gig Worker** Denotes all workers, regardless of sector, that work on short-term contracts. A gig worker can either be independent, such as a musician or freelancer, or can work as an independent contractor for a gig or sharing economy platform (such as Uber).

**Gig Economy** Used in the 21<sup>st</sup> century context, a proliferation of the “informal paid work” enabled by online platforms and spurred by rapidly evolving economic conditions. This is often contrasted to highly structured, formal work arrangements.

**Independent Contractors** In contrast to a “traditional employee,” an independent employee is not employed in the name of a particular organization; independent workers are a heterogeneous mix of consultants, freelancers, gig workers, and contract employees.

**Permanent Employee** Full and part-time employees of an organization, who are able to work for that organization indefinitely, provided they fulfill their performance obligations. To terminate such an employee, employers often have to demonstrate that the employee has failed to deliver on their obligations of performance or be given severance pay.

**Piece Work** A form of employment in which a worker is paid a fixed rate for each completed job or each unit of time (typically an hour).

**Self-employment** All forms of employment in which a person pays one’s own wages and is not technically an employee of another organization.

**Sharing Economy** In its purest definition, this encompasses all economic activity-based members of a group paying for temporary use of a product or service. Used in the present context, refers to sharing economies conducted across platforms that match providers of “shared” assets with potential customers. This can overlap with gig work in situations where there are components of both shared physical property and assets as well as services.

**Side Hustle** Denotes working as an independent worker while holding a position in the traditional economy. Side hustles are used by workers for a range of purposes, including the provision of additional income, building skills, and networking.

**Temporary Employee (Temp)** A non-permanent employee, typically hired on a part-time or “on-call” basis.

**Telecommuting (Working from Home, WFH, remote work)** Completing work responsibilities from a location outside company premises. This can encompass elements of flexibility from where work occurs or, in some cases, even when work occurs.

**Zero-Hours Contract** A form of casual or part-time work in which the employee is not obliged to provide any minimum working hours, and workers are not obliged to accept any work offered. The employee may sign an agreement to be available for work when and as required without specifying the numbers of hours or times of work. This may be distinguished from casual work in some jurisdictions. These contracts enable the most flexible form of “on-call” scheduling and are commonly used in the agriculture, hotels and catering, education, and the healthcare sector.



# Executive Summary

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Technology growth and disruption are increasingly altering our relationship with work. Higher levels of connectivity enabled through digital innovation have bridged geographical divides, making physical work locations and distances less important. Remote offices were one of the first developments blurring the definition of “work.” With this blurring came increased flexibility as to where and how work could be done. Until the very recent past, remote work tended to be an exception to the rule or an added feature of “regular” office life; for example, taking a laptop to a coffee shop or reading work emails during one’s morning commute. Although the momentum behind the virtual office and “work-from-home” policies has grown in Canada and many other parts of the world over the last 20 years, 2020 was the shockwave that turned remote work from a concept to a global reality.

With the spread of COVID-19, remote work pilot projects were launched around the world, in some cases, overnight. Initially, employers worried about losses in productivity,<sup>1</sup> digital infrastructure challenges, and even growing cybersecurity risks<sup>2</sup> with an exclusively online workforce. Today, the demand for cybersecurity infrastructure grows as employers look to build safeguards for their remote workers<sup>3</sup>; early indications of productivity changes during the time of COVID-19 suggest little shift from previous in-office conditions. According to a recent survey completed by PwC gathering information from over 850 CFOs in 24 countries, productivity levels remained relatively stable from March to May 2020. In fact, nearly half of CFOs surveyed are considering making remote work a permanent fixture where possible, and 72% believe that the flexibility measures taken and instilled as a result of COVID-19 will benefit their companies in the long-run.<sup>4</sup>

Advancements in remote work impact the labour market on several levels. They have also spearheaded a new understanding of the nature of work itself. Digital-platform economies have disrupted work schedules, how the work is done, and by whom while opening new avenues of economic participation for various groups across regions, skill levels, lifestyles, and even generations. These new economic and labour market structures are often broadly categorized as the sharing economy—allowing for the sharing of underutilized assets—or the gig economy—focusing on short-term, contract, or “gig” work. Alternative forms of income generation via an informal economy have always existed, but they are now increasingly visible and accessible due to these digital platforms.

In a short time, these platforms have grown substantially in popular use. The most recent official figures, in 2016, Statistics Canada found that over a one-year period alone, nearly 10% of the Canadian population aged 18 or older participated in the sharing economy through the use of peer-to-peer ride sharing or accommodation services; another 1% of those users earned income from it.<sup>5</sup> For the gig economy more broadly, a 2019 study by the Bank of Canada estimated that 30% of Canadians participated in some form of informal work, with 3.5% participating specifically in gig work,<sup>6</sup> often done via online platforms. On these platforms, digital skills were found to be the most in-demand.

With COVID-19 simultaneously underlining and disrupting the digital-platform economy, key questions are being raised about the gig workers that support them. In the short term, COVID-19 is dampening the demand for sharing-economy services while also spotlighting the clear distinctions between highly skilled contractors with in-demand digital skills—who able dictate prices and pick jobs—versus gig workers facing increasingly precarious conditions.

The economic opportunities associated with a global shift to remote work can be significant, and the increasing growth of the digital-platform economy allows new transactions and relationships that bolster the availability of labour, services, and boost convenience. However, as the global spread of COVID-19 has shown, shifts that were previously expected to take years can happen literally overnight under pressing conditions. Guiding this shift and understanding the consequences of these new forms of work is essential to the development of a post-COVID Canadian economy and labour market that is both resilient and inclusive.



# Introduction

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The 2020s opened with labour markets in a state of flux. COVID-19 ushered in a large-scale shift to remote work, putting pressure on businesses, workers, and essential digital infrastructure such as broadband and mobile connectivity. At the same time, it has thrown into the spotlight key supports like social networking sites, online communication platforms, virtual education resources, ecommerce offerings, and more. Increasingly, work and life are not defined by conventional 9-to-5 work structures and physical offices. A growing portion of the labour force was already shifting partially to remote work arrangements prior to COVID-19, but the onset of the pandemic was the catalyst that—at least for the time being—pushed remote work from a relatively uncommon practice and exception to the rule, to a common reality and standard practice.

The gradual growth of online work in recent years also supported growth in the digital platform economy, which is now facing a colossal shift as a result of COVID-19. “Gig” work has existed for centuries, but the modern “gig” is increasingly completed via online platforms. Well-known favourites such as Airbnb, Uber, Door Dash, TaskRabbit and others are recalibrating as COVID-19 stifles the demand for certain services (particularly accommodation or casual transportation) and bolsters appetite for others, such as online shopping and delivery services.

Technological progress is key in continuing to support the larger economic patterns seen in recent decades, including gig work, remote work, and online work. During and immediately following the financial crisis of 2008, gig work saw a surge as people began relying on platforms like TaskRabbit to fill income gaps.<sup>7</sup> Similarly, during the 2018 US Government shutdown, slowdown in full-time work also caused some government workers to turn to gig platforms to generate income.<sup>8</sup> According to the popular gig platform Fiverr, the shutdown period saw a 350% increase in posted gigs in the California-Lexington Park area of Maryland (where federal workers represent 16% of all residents).<sup>9</sup> Although important concerns regarding these new models of work exist, they may also act as significant opportunity-generating machines when workers need to adapt to economic trends and disruptions.

From March to May 2020, COVID-19 has shrunk overall employment in Canada by 3 million.<sup>10</sup> With future economic uncertainty looming, it is plausible that another substantial surge of gig work may occur as laid-off workers look for alternate sources of income, particularly with the phase out of government-sponsored financial assistance programs. Remote work and the gig and sharing economy are poised to play important roles in our current and post-COVID world. This study sheds light on the crucial topics that will continue to transform our labour force and our relationship with work, while underlining economic and social implications for Canada and Canadian workers.



**Section I** provides a background to the changing nature of work, shifting labour demands, and the increasing digitization of the economy.



**Section II** discusses the growth of the platform economy, highlighting the difference between common terms such as the “sharing economy” and the “gig economy.” This section also identifies important economic and labour-market considerations for this growing trend in Canada, including high-demand gig work, generational considerations, and the impact of COVID-19 on the gig and sharing economy.



**Section III** describes the global competition for talent and skills, exacerbated in part by the rise of the platform economy and gig and remote work.



**Section IV** describes key regulatory considerations for the gig economy, including employment classification, unionization, and COVID-19’s impact on the regulatory landscape of the gig economy.





## BACKGROUND

# Pathways for the Future of Work

### The Shift Away from Traditional Work Arrangements

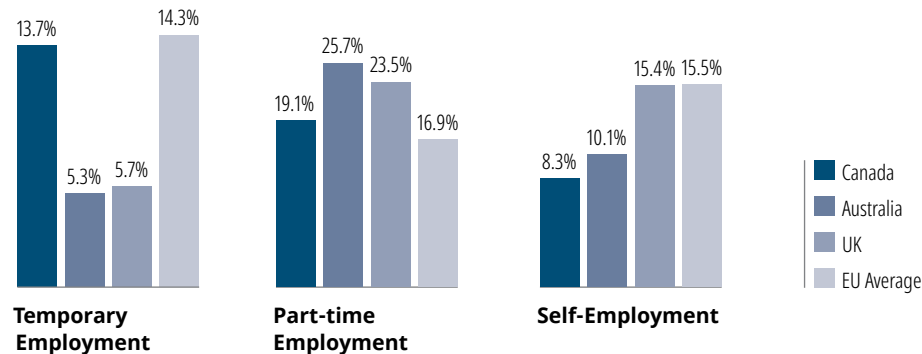
Labour force and market trends point to an employment evolution that challenges traditional work arrangements. Economic volatility and the growing participation of millennials and Gen Zs in the workforce have spurred a shift away from long-term work relationships that were once common for the “boomer” generation. Where it was once common for employees to work for a single employer over an entire career,<sup>11</sup> movement between employers and even careers are far more frequent today. A recent study completed by LinkedIn found that millennials changed jobs about twice as frequently in their first 10 years of employment as Gen Xers did.<sup>12</sup> At the same time, the presence of contract, freelance, or gig work is on the rise.<sup>13</sup> The most recent Canadian census found that less than 50% of Canadians aged 25–54 were engaged in full-time work—and part-time and contract work increased notably since the previous census. Currently, the most common alternative forms of work in Canada are:

- SHORT-TERM CONTRACTS
- INDEPENDENT CONTRACTING
- PART-TIME WORK
- SELF-EMPLOYMENT
- CONSULTING OR FREELANCE WORK
- PROJECT-BASED OR TASK (GIG) WORK

Varying rates of employment on a part-time, temporary, or self-employed basis are notable among OECD countries. In 2017 in Canada, the rate of part-time employment totalled slightly more 19% of all work, compared to the OECD average of 16.5%. More than 13% of Canadians were employed on a temporary basis. Factoring in self-employment (8.3% of all employment), this means that over 40% of the Canadian workforce was employed on a non-permanent basis in 2017.

**Figure 1: Alternative Employment in Canada and Around the World, 2017.**

Source: OECD Employment Data, 2017.



Comparatively, the highest rate of part-time employment in the OECD was found in the Netherlands, representing nearly 38% of the workforce, and the highest rate of temporary employment was seen in Colombia, totalling slightly more than 28% of the workforce.

The rise of digital platforms are significant accelerators for self-employment and temporary work. Digital platforms of the gig economy are disruptors to traditional employment, oftentimes acting as digital job boards for those looking for flexible, on-demand or online employment. Over the last five years, the popularity of part-time work via digital platforms has grown substantially, as the type and volume of employment platforms expanded. In 2019, it was estimated that over 150 key apps powered the global gig economy<sup>14</sup> as workers increasingly sought alternative forms of income generation outside of “traditional” jobs. A recent McKinsey study echoed this growing trend, stating that 30–45% of the US working-age population would like to earn either primary or supplemental income through independent work. The flexibility offered by the gig economy, including the ability to choose working style and structure, was a key determinant in trend.<sup>15</sup>

## The Growth of Remote Work

Remote work has become increasingly common over the years as it intersects with opportunities to perform work in new ways via digital technology. Already in 2016, 75% of global organizations offered remote working opportunities to employees, including the ability to vary hours or work from home.<sup>16</sup> Remote work is also a growing trend in Canada. A 2017 survey completed by Regus found that even then over 45% of Canadian workers spent half a week or more outside of the office, with another 11% working exclusively from home.<sup>17</sup>

While remote work opportunities can cause unintended challenges for employees and employers—such as a lack of delineation between work and home, or time spent on tasks other than work<sup>18</sup>—an increase in workplace flexibility as a result of remote



work can open numerous opportunities for bolstered economic participation. For example, with expanded remote work opportunities, skilled workers living in rural and remote areas (with reasonable levels of broadband connectivity) can have the opportunity to participate in the labour market without having to travel to an urban centre; this, some believe, can help “reverse the rural brain drain”<sup>19</sup> and decrease pressure on urban housing markets. Similarly, people with disabilities who are adversely impacted by traditional in-office work arrangements can also have a greater chance of economic participation through remote work. In addition, some argue that remote work itself may be the catalyst that pushes large-scale inclusive design and the regular use of accessible technology.<sup>20</sup>



Right now, housing near cities is prohibitively expensive and rising quickly. And why should it not be? That is where the jobs are, and people need to move to them. As they do, city and suburban populations grow, and there is more pressure on housing prices. Nothing will change until we break the model completely and give up the idea that [physically] going into work every day is a requirement for holding a job.

— Linda Nazareth, author of *Work is Not a Place*

In many ways, the continued momentum of remote work is a great benefit to workers. The growth in popularity of coworking spaces like WeWork already highlighted the reality of the growing number of workers outside of traditional office environments.<sup>21</sup> At the same time, the increasing participation of younger generations—millennials and Gen Zs—are restructuring workplace preferences: Deloitte’s 2019 Global Millennial Survey found that 75% of millennials and Gen Zs felt that opportunities for remote work or the ability to work from home were important career considerations.<sup>22</sup>

Remote work advocates were already calling for 2020 to be the “year of remote work,”<sup>23</sup> however, no one was truly prepared for what is now being dubbed the “world’s largest work-from-home experiment.”<sup>24</sup> Transitioning to large-scale remote work under what are likely some of the worst-case scenarios—lack of preparedness, stress from the quickly spreading virus and resulting measures, the closure of schools and move to virtual education—caused fears to mount about worker productivity and performance during this period. Yet, according to a recent survey completed by 8X8, 90% of US worker respondents indicated that they felt “confident” or “very confident” that they will remain productive while working remotely.<sup>25</sup> In Canada, worker productivity has grown by around 25% since lockdown measures came into effect<sup>26</sup> despite initial concerns. Undoubtedly, global economic production has stalled, but at least to date, productivity has not taken a turn for the worst with the shift from the physical to virtual office.

Remote work is not without its challenges in good times, let alone under the conditions of a global pandemic of uncertain duration. Sweeping work-from-home realities has led many human resources professionals and business leaders around the world to worry about its potential negative side effects for workers’ wellbeing;

these include the lack of delineation between work and home, long hours, and a breakdown of communication.<sup>27</sup> With productivity—for the time being—remaining relatively stable under remote work conditions, there are growing concerns about employee burnout and the struggle to set healthy boundaries between professional and personal lives.<sup>28</sup>

### *Remote Work During COVID-19*

The coronavirus pandemic facilitated a mass-scale work-from-home experiment. On March 30th 2020, over 62% of US workers were working from home. In 2015, the portion of workers in the US who occasionally worked from home was slightly more than 30%.<sup>29</sup> However, even today, remote work opportunities are largely found to exist among traditional employees. A recent Massachusetts-based study found that during the crisis, working from home was much more common for full-time employees (62% working remotely) compared to part-time or hourly workers (43% and 40% working remotely, respectively). Additionally, those with higher levels of education (university degrees, in this case) were much more likely to be working from home than those with a high school education or less (83% vs 35%).<sup>30</sup> This disconnect has led many to argue that the onset of COVID-19 has underscored existing class divides and social inequalities, namely between workers who have the capability to work from home and essential workers—such as food processors, transit workers, sanitation workers and others—the majority of whom are not able to work remotely and also lack adequate protective gear, sick leave, health insurance, and hazard pay.<sup>31</sup>

For those capable of remote work, previous research on the topic has highlighted benefits, such as increased productivity and retention (along with cost reduction). One of the clearest downsides, however, was increased “loneliness” or feelings of isolation among remote workers.<sup>32</sup> While many companies were experimenting with remote work prior to the onset of COVID-19, the global public health emergency has forced many to adopt remote work protocols, often without adequate preparation including clearly laid-out policies or sufficient equipment and network support.<sup>33</sup> The adoption of large-scale remote work under COVID-19 is far from an ideal scenario; it is further compounded by stress and anxiety over health and economic risks, as well as the shift to virtual education, requiring many workers to balance work duties, parenting responsibilities, and the educational needs of children.

Despite these challenges, attitudes toward working from home since the COVID-19 outbreak appear to be largely positive for the time being. A study of US workers by Glassdoor found that 67% supported the notion of indefinite remote work during the pandemic. Additional findings from this survey noted that 60% of workers were confident that they could perform effectively while working remotely, and half (50%) believed that their productivity would remain the same or even increase.<sup>34</sup> In Canada, similar results were found: a recent survey of 2,000 Canadian professionals completed by LinkedIn found that the majority—nearly 60%—believed that they were working from home effectively.<sup>35</sup>



Although it is too soon to tell how remote work will evolve post-COVID, some organizations are taking critical steps to define a broad remote work strategy around the pandemic. Some large tech companies have led the charge toward remote work, rapidly transitioning their workers to home offices during the early stages of the COVID-19 outbreak. Industry giants Microsoft, Google, Facebook, and Apple were among the first corporations to fully transition to home offices as lockdown orders were issued. Google and Facebook have announced that they will permit their employees to work from home through the end of 2020<sup>36</sup> while Microsoft and Amazon will allow their employees to work remotely until the end of October 2020.<sup>37</sup> In May 2020, Canadian tech leader Shopify announced that it will be a “digital-by-default” organization, with the entire workforce working remotely until the end of the year. Shopify is also putting measures in place to allow the majority of its staff to work remotely on a permanent basis after 2021.<sup>38</sup>

Around world, many important considerations are also arising related to remote work and its impact on larger labour market shifts such as gig work. Will gig work be more prevalent in regions where economic recovery is slower? Will this lead to more businesses relying on gig workers going forward, and if so, what does this mean for workers and local economies? Or, will gig work instead see a more robust growth in jurisdictions with a strong labour market, where specialists with in-demand skills have the freedom and flexibility to choose their work, projects, and clients? Remote work will undoubtedly play a key role in our future economy and labour market, with digital skills likely to see continued demand. Whether large-scale remote work remains the modus operandi in a post-COVID world remains to be seen.



# Digital Disruption and the Rise of the Platform Economy



The future of work is now the present of work.

— Simon Chan, VP Talent, Academy & Future of Work, Communitech

## What is the Digital Platform Economy?

Described briefly above, one of the central developments in the way we work are the rise of digital platforms. Digital platforms create global marketplaces, allowing employers to connect with workers, buyers, and sellers. The reach of these platforms is anchored to the premise of superior matching of goods and services with buyers while simultaneously solving problems of traditional marketplaces (where the seller or employer tends to have an advantage), such as lack of transparency or information asymmetry. Information asymmetry exists where one party possesses greater knowledge or insight related to a transaction than the other. Digital platforms strive to relieve this asymmetry through various mechanisms of transparency, including rating systems. Rating systems are common across digital platforms, and because they are public, they arguably incentivize good behaviour by both the service provider and the users.

Interviews with Canadian “future-of-work” industry leaders in this study highlighted the key strength of the platform economy as filling certain “gaps” in the traditional economy. These gaps ranged from flexibility to addressing issues of seasonal hiring needs. Moreover, interviewees noted that in a period of economic downturn like the COVID-19 prompted recession, flexible work offered by online platforms can be useful to mitigate loss of income while helping employers limit financial uncertainty.

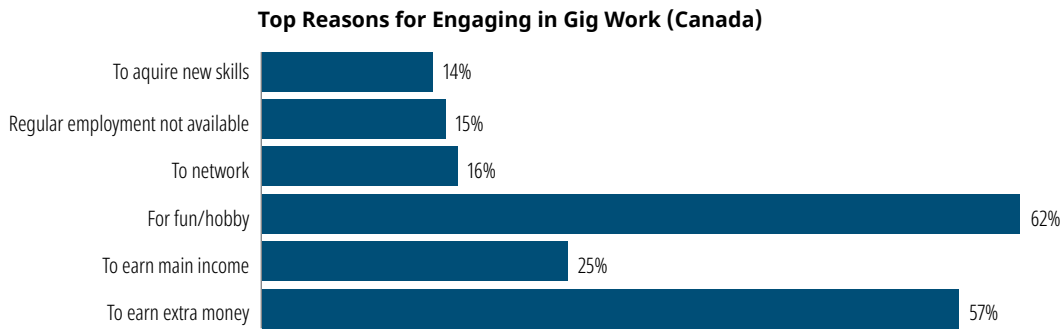
## The Gig Economy

Drawing on mechanisms from digital platforms, the “gig economy” focuses on matching individuals seeking short or task-based employment opportunities with customers or employers seeking these types of services. Common examples of gig economy platforms include Freelancer.com, Upwork, TaskRabbit, Amazon Mechanical Turk, and Fiverr. Although there have always been workers employed on the basis

of temporary “gigs” (including artists, musicians, freelancers, trades contractors), digitalization has altered these models, allowing them to be far more widespread in the economy.<sup>39</sup> Figure 2 below highlights the top reasons for undertaking gig work in Canada, according to 2019 research by Bank of Canada. Table 1 showcases the ability of common gig platforms to solve the problem of information asymmetry, while encouraging flexibility.

**Figure 2: Reasons for undertaking gig work in Canada, 2019.**

Source: Bank of Canada, 2019.



**Table 1: Features of common gig work platforms<sup>40</sup>**

Source: OECD, 2019.

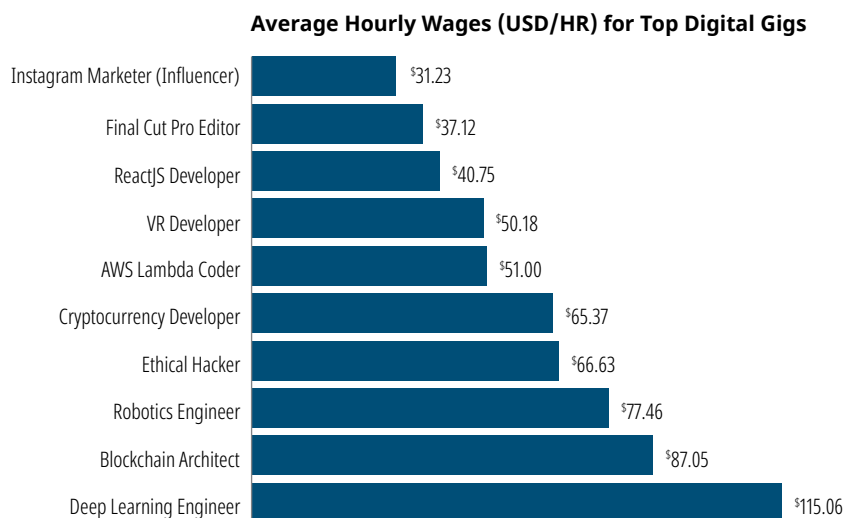
	Uber	Handy	UpWork	Mechanical Turk
Offers reputation/rating system	●	●	●	●
Offers clients insurance	●	●	○	○
Uses fully automated matching algorithm	●	○	●	○
Has surge pricing feature for increased market demand	●	●	○	○
Customer chooses provider	○	●	●	○
Price is set by	Platform	Platform	Worker	Client

The advent of big data and AI, along with advancements in connectivity, have boosted the proliferation digital platforms;<sup>41</sup> as a result, the popularity of the gig economy also grew. As regional economies around the world face pressure to grow and improve productivity, digital platforms offer opportunities for alternative methods of economic participation and engagement. Yet, the impact of these platforms on vulnerable (often lower-skilled) workers has not necessarily been favourable. Acting as a global medium for skills and competencies, the gig economy has commodified some forms of labour.<sup>42</sup> A recent report by digital think tank Doteveryone found that the gig economy suffers from significant shortcomings, including a lack of financial security for workers, a loss of dignity at work, and the inability to progress in a career.<sup>43</sup> In some cases, this can even put downward pressure on wages: an average Uber driver in the US is estimated to make between \$8.55 and \$10 an hour after deductions. This is significantly lower than the average hourly wage of a full-time taxi driver, making \$17 an hour.<sup>44</sup> Low rates of pay associated with a large portion of lower-skilled gig work effectively eliminates the element of flexibility because earning a meaningful sum requires working many hours. Moreover, as COVID-19 continues to spread, many precarious gig workers such as delivery people or Uber drivers are now being recognized as “essential”. These workers come into contact with several people each day, thereby greatly increasing their chances of contracting and transmitting the illness,<sup>45</sup> which makes their jobs more dangerous.

On the other hand, digital platforms can immensely benefit gig workers with specific digital skillsets that are deemed in-demand, especially when those skills are in shortage. Although even some high-skilled gig workers are feeling the brunt of the economic shutdown caused by COVID-19,<sup>46</sup> certain digital skills are currently found to be the most in-demand on platforms for gig workers. React (or React.js or ReactJS) developers, blockchain developers, AI engineers and other tech roles are in high demand, with wages ranging from \$31 USD to more than \$115 USD per hour.<sup>47</sup>

**Figure 3: Average hourly rates (USD) for top digital gigs, 2019.**

Source: *The Balance*, 2019.



According to UpWork, the majority of top-ranking skills on the platform in 2019 were digital, with some seeing growth rates of up to 400% year-over year.<sup>48</sup>

**Table 2:** Y-O-Y growth in digital skills on gig platforms, 2019.

Source: Upwork, 2019.

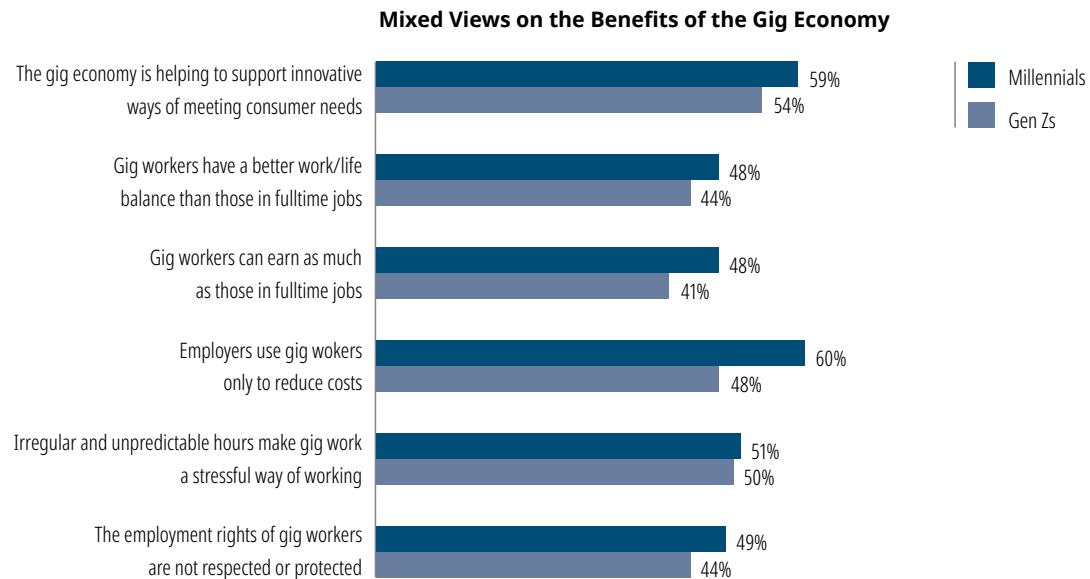
Skill	Competency	YOY Demand Growth on UpWork
ServiceNow	Cloud computing	400%+
DaVinci Resolve	Video editing	400%+
PyTorch	Machine learning	400%+
Keras	Deep learning	400%+
Caspio	Database administration	400%+
Kendo UI	User interface	400%+
Salesforce Lightning	CRM	120%+
D3.js	Data visualization	120%+
Moz	Digital marketing	120%+
Azure	Cloud database	120%+

### *The Gig Economy, Generational and Lifestyle Considerations*

One of the key drivers for participation in the gig economy is flexibility. In BC, a survey of gig economy workers found that the vast majority (70%) valued the flexibility of gig work, ranking it higher than the ability to earn more money through full-time work.<sup>49</sup> The importance of workplace flexibility, however, is not valued only by gig workers; it is a notable factor among younger workers engaged in full-time work as well. Deloitte’s 2019 Millennial Survey collected data from over 13,000 millennials in 42 countries and over 3,000 Gen Zs in 10 countries. The findings highlight a relatively strong appreciation for the gig economy but mostly as a means of supplemental employment, not full-time employment. Four in five millennials and Gen Zs find the gig economy appealing, but only 6% of millennials would choose gig work over full-time work as a primary source of income.<sup>50</sup> Overall, both millennials and Gen Zs had balanced and similar views on the gig economy. Millennials showed a slightly higher evaluation for the earning potential of the gig economy, but the biggest discrepancy between millennials and Gen Zs related to their views on why employers offer gig work.<sup>51</sup>

**Figure 4: Views on the gig economy – millennials and Gen Z, 2019.**

Source: Deloitte Millennial Survey, 2019.



While the majority of gig economy participants tend to be young workers, gig work is increasingly viewed as a viable option for aging populations or those re-entering the economy after time off. Edmonton-based Work Evolution was created for this very purpose: to allow flexibility for new mothers seeking to re-enter the workforce on a part-time basis. Tara Dragon, Founder of Work Evolution, explains that the idea for Work Evolution came as a result of a friend’s denied request for flexibility upon re-entering the workplace.



My friend gave birth to her first child approximately one year ago and is at “decision time” regarding her work. Should she go back to her old job? Return full-time? Try to negotiate flexible work arrangements? Ultimately, she decided that she did want to go back to work, but not in a full-time capacity. When she approached her employer, the strong message was “Full-time and in the office only.” In other words, no flexibility... I decided to take matters into my own hands and started to craft the idea that would eventually become Work Evolution.

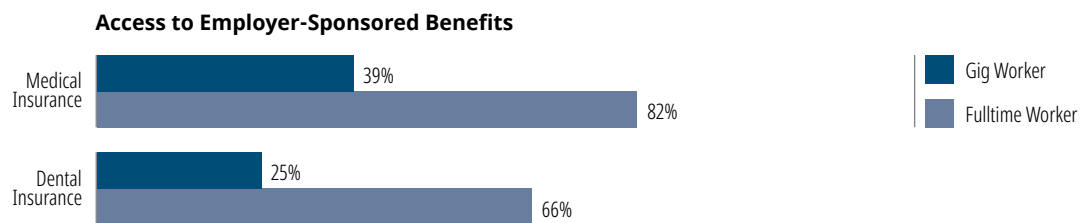
— Tara Dragon, (former) Founder of Work Evolution

Recent data from Hyperwallet found that 12% of its 2,000 female gig workers were between the ages of 51 and 70,<sup>52</sup> and other platforms such as Uber and DogVacay (formerly Rover) state that 50% and 25% of their workers are over 50,<sup>53</sup> respectively. The gig economy is increasingly seen as a viable option for workers of various lifestyles and ages. However, the motivations for participating can be different among various groups. While new mothers may see the gig economy as a way to re-enter the workforce on a part-time basis, younger gig workers often use it to supplement income. Some seniors use gig platforms to supplement their retirement income, but many retirees see it as a way of meeting new people, sharing knowledge, and “keeping busy and active”<sup>54</sup> in retirement.

However, an over-reliance on gig work in its current form—often lacking employment benefits provided to full-time workers—can also pose significant impacts on society as workers age. A survey of current gig workers in the US noted that only 16% have assets in an employer-sponsored retirement plan, compared with 52% of workers with full-time jobs.<sup>55</sup> Similar results were noted when it came to access to employer-sponsored healthcare plans. The same study found that 82% of full-time workers had access to employer-sponsored health plans, compared to 39% of gig workers. This discrepancy has significant consequences for state-sponsored healthcare systems, household debt levels, and retirement capabilities, as gig workers may currently be underprepared for retirement.

**Figure 5:** Access to employer-sponsored benefits in the US, gig and full-time workers, 2018.

Source: Prudential — Gig Economy Report, 2018.



### The Gig Economy and COVID-19

There are some indications that the COVID-19 pandemic could expedite the growth of the gig economy. Following the 2008 recession in the US, the American gig economy increased pointedly from 6.0% of the total economy to 6.8% in 2009 because some people who lost full-time employment were “pushed” into self-employment. However, it will be difficult to evaluate impacts of the pandemic on gig work because gig workers are not identified in any of the main sources of Canadian employment data.<sup>56</sup>

The coronavirus pandemic exacerbates pre-existing tensions between the economic opportunity provided by the gig economy and the precarious nature of gig work. In addition to a lack of guaranteed income, COVID-19 raises important questions about sick leave, healthcare benefits, and unemployment protection. In Canada, the Coronavirus Emergency Response Benefit (CERB) was originally launched to provide financial assistance to those who have lost 100% of their wages due to the coronavirus.<sup>57</sup> However, partly in response to concerns from gig economy workers who did not originally qualify for the benefit,<sup>58</sup> the federal government expanded eligibility criteria to include workers whose monthly income has been reduced to \$1,000 or less.<sup>59</sup> Other governments around the world (including Denmark, France, Norway, and the United States) have also responded with rescue measures and financial support for self-employed workers who are not typically eligible for unemployment insurance.

Bringing increased visibility and recognition to non-traditional forms of work, COVID-19 has also ushered in new challenges for digital platform companies, as they try to continue operations, ensure public safety, and manage their role in the protection of service providers. While many such companies were criticized for slow or ineffective responses early in pandemic, some are beginning to take active measures and create policies to support their workers during this unprecedented time. Uber and Lyft recently announced new protocols for their services as economies around the world begin to open again; these directives include mandatory mask-wearing for both drivers and passengers, a limit on the number of passengers per vehicle (three), and enhanced sanitation measures (including requests for passengers to sanitize their hands before taking a ride, sit in the back, and even open a window if possible).<sup>60</sup> The penalty for non-compliance is exclusion: Lyft maintains that anyone who does not agree with these terms will be unable to request a ride with the service.<sup>61</sup>

Relatedly, perhaps the most significant developments for the gig economy has been the growth in media coverage and public outcry over the dangers of COVID-19 linked to gig workers, many of whom are considered “essential.”



The recovery from the fallout of the COVID-19 pandemic is an opportunity to remedy the major cracks in the Canadian labour system. The pandemic shone a spotlight on what was already broken before, like the unsafe conditions and economic insecurity faced by workers in long-term care homes, temporary work, and doing freelance gig work across the country. We all deserve good health, labour rights, and a living wage.

— **Kai-Hsin Hung**, Future of Work Policy Researcher  
at the International Labour Organization

While the gig economy gained significant momentum during the previous economic slowdown in 2008, COVID-19 has brought new challenges for both traditional workers and gig workers. Lockdown measures, ceasing of non-essential activity, reduced travel, economic challenges, and other factors have resulted in significant impacts on businesses and participants of the gig economy.

### *The Sharing Economy*

The “sharing economy” is built upon the premise of underutilized assets that can be leveraged in a more efficient manner. This is most commonly done through a digital platform.<sup>62</sup> These models exist in different forms. Some models emphasize community engagement by extending ownership to those without the means to own goods; others might focus on the environmental impact of reducing waste as a result of individual ownership. A recent report surveying users of the sharing economy found that nearly 80% of respondents considered the sharing economy beneficial to society and good for the environment.<sup>63</sup> This sentiment was echoed by one of the industry leaders interviewed in this study. Running a commodity-sharing digital platform with various “rentable” items, the key intent of this company is to reduce waste and environmental damage by making goods available for use by the community. In fact, waste reduction is echoed as the primary goal of the service.





We see the place that peer-to-peer online lending has, but it hasn't gained quite as much traction as people expected it to. In the place of that, there's a real opportunity to have a shared space that we own together, where we collectively pay to maintain it through a single provider.

— Chris Diplock, Thingery

The sharing economy provides value to two main groups: it produces income for those who share their assets; and it allows another group of people to access goods for whom full-time ownership would be prohibitively expensive, impossible due to the limited availability of the goods, or just impractical. The actual rationale and mechanisms are themselves nothing new. Sharing mechanisms, such as timeshares for vacation homes, have existed for decades. What is new in the modern version of the sharing economy is the use of digital platforms to expand awareness, attract users from around the world, and enable the easy sharing of various types of goods.

The sharing economy continues to grow rapidly in Canada. Even four years ago in 2016, nearly 10% of Canadians reported participating in the sharing economy. During this time period, a study by PwC Hungary predicted the rapid digital transformation of several industries, including accommodation and transportation. This report estimated that the growth of the sharing economy would transform these sectors from less than 10% platform based (90% traditional) to around 50% platform based.<sup>64</sup>



### **Blending Municipal Transportation with the Sharing Economy: Innisfil Transit Partnership**

In 2016, the Town of Innisfil created a partnership with Uber to serve the community's growing transit needs. A result of its population growth, Innisfil needed affordable, reliable transportation options that exceeded existing services. Local transit authorities identified that traditional transit options—like the addition of new bus lines—would prove to be too expensive. In May 2017, a partnership was formed between the Town and Uber, where residents would be able to access Uber services at a reduced price (with the Town subsidizing ridership).

While this project generated significant enthusiasm at the onset and was well-received by the community, operational challenges have since emerged. Due to its popularity, Innisfil has had to raise fares and cap rides for users. With ridership being limited to a small number of passengers per vehicle, increased usage in this case has not resulted in lower operating costs (as would be the case with traditional mass transportation services).

*Source: "The Story of Innisfil", Uber Blog, June 25, 2019.*

Similar to the gig economy, the rapid growth of the sharing economy is not without its challenges; primarily, it raises questions of equity and fairness on two fronts. One, the “uberization” of the economy has been labelled by some as a complicit factor in the rise of precarious gig work. Two, there are also arguments that while the sharing economy creates more “options” for services like accommodation and transportation, the main beneficiaries are still the tech-savvy people who are already wealthy, not those who provide the services needed to sustain this economy. A 2019 study found that in the US, nearly 40% of families with household incomes of \$100,000 or more used sharing economy services, compared with just under 20% of families with household incomes up to \$50,000.<sup>65</sup>

### *The Sharing Economy and COVID-19*

The onset of the COVID-19 pandemic appears to be slowing the sharing economy transition. Sharing-based solutions—such as ride sharing, home sharing, other asset sharing—increase the rate of human contact,<sup>66</sup> and thus, can prove effective in seeding or spreading the disease.<sup>67</sup> Globally, the appetite for sharing economy services has waned in the wake of the pandemic. A survey conducted by Ipsos on worldwide consumer patterns found that nearly 60% of US residents who previously used sharing economy services avoided doing so during the pandemic.<sup>68</sup>

Several businesses that had invested heavily in the sharing economy, such as SoftBank that recently purchased the struggling WeWork, have suffered losses. SoftBank estimates current losses totalling of nearly \$10 billion.<sup>69</sup> Similarly, shared micro-mobility services such as the electric scooter company Lime have suspended services across different markets internationally and face the prospect of layoffs.<sup>70</sup> The mixture of economic shock, lockdown restrictions, and a drop in activity has ushered in significant challenges to even the most successful sharing economy companies. According to Uber, which recently laid off nearly 4,000 drivers amid the COVID-19 economic contraction, ridership has fallen by 80% from the same period last year.<sup>71</sup> One interviewee in this study, operating a ride-sharing company across several Canadian cities, highlighted a substantial drop in business activity as well.



Like most of the sharing economy, Turo has been impacted by the COVID-19 crisis and has experienced a decline in guest demand. Domestic and international travel have been most heavily impacted, whereas local trips have been impacted to a lesser degree. In the context of a pandemic, many people still need access to cars—whether they are essential workers, or they need a car for getting groceries or supplies while avoiding public transportation. We have made significant changes to adapt to this new environment and protect the wellbeing of our hosts and guests. On top of offering all guests a worry-free cancellation policy, we have implemented enhanced cleaning and disinfection guidelines for our hosts and provided them with preferential rates for cleaning services and supplies to effectively disinfect their cars. Long-term, sharing on Turo will be a great option for people who need extra income opportunities and who seek to offset the high costs of car ownership. We also expect Canadians to travel more locally, and Turo will continue to be the best place to find the right car for their adventure. We're still planning for new market expansions, features, and partnerships for Canada in 2020.

— **Cedric Mathieu, Vice-President and Head of Canada at Turo**

Another sharing-economy challenge brought on by COVID-19 relates to the nature of “digital platforms as intermediaries.” A prime example is the situation currently faced by Airbnb. Due to travel restrictions and trip cancellations, Airbnb is currently balancing the demands of travellers requesting refunds for cancelled reservations and hosts who argue that they should be entitled to keep the funds because the COVID-19 pandemic is outside of their control. Seeing substantial losses due to the onset of the pandemic, Airbnb recently sought assistance from the Canadian federal government to help hosts cover losses related to COVID-19 cancellations.

COVID-19 has curbed both the appetite and sustainability of sharing-economy services while destabilizing their ability to act as neutral parties that advocate for neither users nor sharers. Regulating the sharing economy has long been a topic of discussion. The question of who is liable in the event of an incident—users, sharers, or platform owners—has now re-entered the debate as a result of COVID-19.





# Global Competition and Growing Demand for Digital Skills with Rise of the Platform Economy

## Global Competition for Gigs

The growth of remote and gig work inevitably brings with it the element of global competition. This can mean domestic outsourcing to lower-cost jurisdictions—to places like Two Rivers, Wisconsin, a destination for many US-based tech companies seeking lower-cost technical talent<sup>72</sup>—or offshore outsourcing.

### *Outsourcing in the Gig Economy: Opportunity for Workers with Digital Skills*

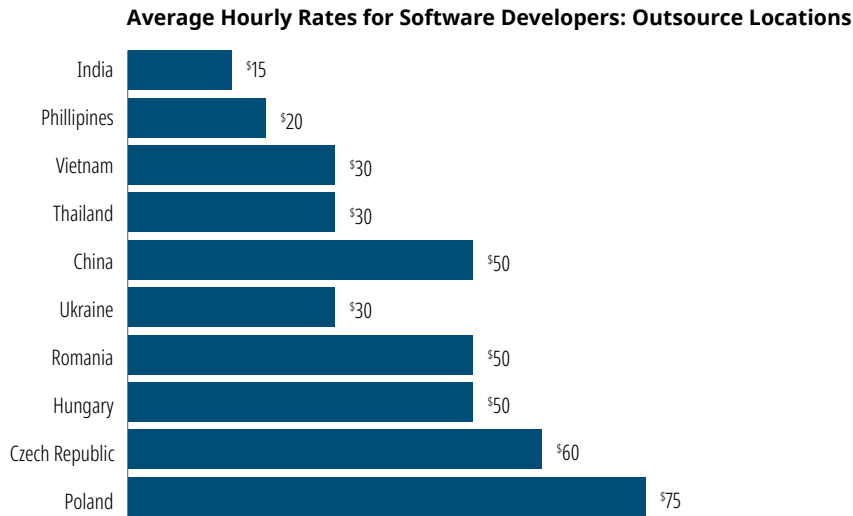
As early as the 1990s, businesses began to search for new methods of driving economic output and driving down costs through digital technologies. Companies had always hired contractors or temporary workers to fill demand in peak business times or provide support based on seasonal need. Outsourcing and offshoring were the subsequent steps in this process. These practices frequently entail the need to substantially restructure internal business activities and even transfer staff from a home to host country.<sup>73</sup>

Growth in digital technology and improved connectivity have allowed more businesses to outsource certain roles or projects to jurisdictions around the world. The most common reason for outsourcing is usually to reduce operational costs (without sacrificing quality).

In 2019, India topped the list of global outsource locations for software development. With a strong supply of skilled tech talent, the average hourly rate for a software developer in India is about \$15/hr, making it an attractive destination for outsourcing. Other competitors for digital gigs include Vietnam, the Philippines, Thailand, and China, all with hourly rates between \$20–50. Beyond that, Eastern Europe—Ukraine, Romania, Poland, etc.—offer average hourly rates between \$30–75.<sup>74</sup> This compares with hourly wages for contract software developers in the US at \$80–200, depending on experience.<sup>75</sup>

**Figure 6: Average hourly rates for software developers (outsource locations)**

Source: Saigon Technology, 2020.



### *Global Competition Considerations: International Growth in Gig Work*

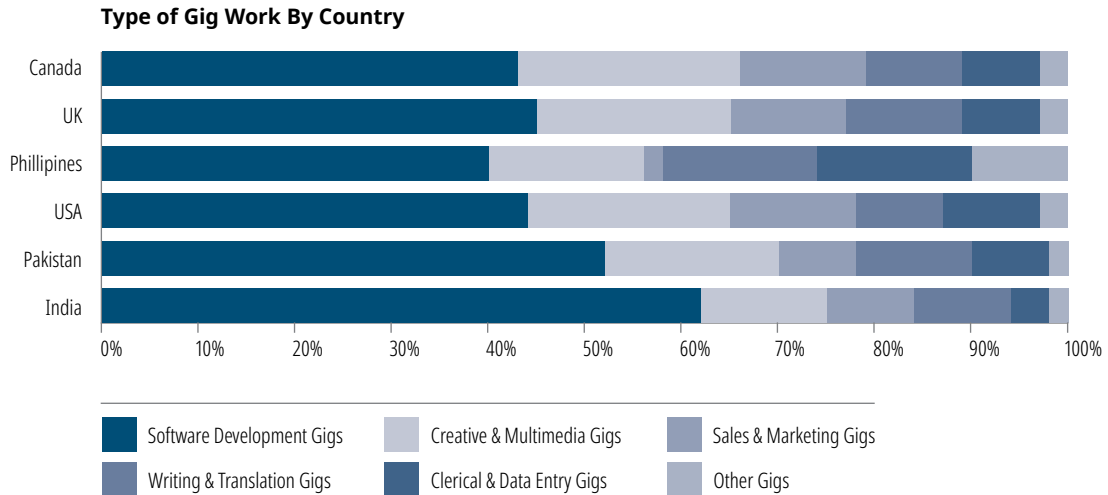
Globally, over 48 million people are registered on labour matching websites, representing an estimated \$4.4 billion market for online freelancing.<sup>76</sup> Countries such as Malaysia and Nigeria are actively encouraging and training workers to participate in these online labour platforms in an effort to reduce poverty. In Malaysia specifically, the government views online gig work as a way to drive economic growth by providing underemployed citizens the ability to perform part-time work. The Malaysia Digital Economy Corporation has set up specific programs, such as eUsahawan, that encourage underemployed people to find work via online gig platforms.<sup>77</sup>

Asia has become the leading region for outsourcing across a variety of roles, ranging from software development to tax preparation.<sup>78</sup> Countries on the top-ten list of fastest-growing gig economy revenues include Pakistan, the Philippines, India, and Bangladesh.<sup>79</sup>

While India shows the highest levels of gig participation in software development,<sup>80</sup> the table below highlights that gig work of various kinds is increasingly common the world around.

**Figure 7: Type of gig work by country, 2019.**

Source: Online Labour Index, 2019.



While increased access to flexible gig work has opened tremendous economic opportunities for both employer and workers, the challenge of precarious work is especially prevalent among countries in the global south. In some cases, new forms of outsourced labour to lower-cost jurisdictions can be coupled with the avoidance of labour responsibilities (a digital platform or intermediary is less tangible or visible than a physical factory), and as work crosses borders, it is unclear what, if any, labour rights apply in the context of gig work supported by online platforms.

Recent research completed by the Nordic Council of Ministers looked at future implications tied to the growth of the digital platform economy. This study found that high-skilled and high-demand professionals can leverage the gig economy for increased incomes through better global access to opportunities, but professionals that have (increasingly) outsourceable jobs will experience downward pressure on wages as a result of these booming markets for professional services.<sup>81</sup>



# IV

## Regulation and the Gig Economy

One critical consideration for the growth and development of this economy is regulation: that is, defining an appropriate pathway to regulation for digital platforms for Canada and Canadian workers. One industry leader interviewed in this study especially highlighted this need, noting that international planning efforts should be utilized to understand how our cities and communities can best benefit from the development of the platform economy and how we can ensure that the rights and needs of gig workers themselves are protected. Other key concepts include evolving infrastructure needs, city planning, and carbon-neutral energy production under a future where many assets and goods are shared rather than owned.

Although notable strides in regulation of the gig economy have been made over the years in places such as California<sup>82</sup> and the European Union,<sup>83</sup> the COVID-19 pandemic has highlighted the need for better regulation and policies to protect gig workers, many of whom are now classified as “essential.” With headlines of Uber drivers around the world succumbing to COVID-19 after picking up sick passengers,<sup>84</sup> the spread of the pandemic has reinforced pre-existing concerns over the precarious nature of many types of gig work, which typically lacks safeguards such as guaranteed wages, health insurance, and sick leave. Concerns of precarious work had been highlighted by advocates of gig workers for many years; COVID-19 has pushed these discussions into the spotlight.

### Who is Considered an Employee?

In Canada, the Employment Standards Act defines the responsibilities of an employer in relation to their employees and contractors. The Act makes it clear that in the case of employees, employers are required to provide statutory benefits such as a minimum wage, overtime pay, personal or emergency leaves, parental leaves, and severance pay. Additionally, in the case of employees, employers are required to collect payroll deductions for CPP, EI and income tax.<sup>85</sup> When hiring an independent contractor, however, employers are not legally required to provide any of these benefits or protections.<sup>86</sup> While the business models of many gig or sharing economy platforms are largely based on hiring workers as independent contractors—meaning payment is only required for actual hours worked—there is mounting concern about whether or not these workers should actually be classified as employees who are entitled to statutory benefits.



Many industry leaders interviewed in this study commented on the need for immediate action in gig-economy regulation. One interviewee stated that action must be taken to first revisit existing regulation on employees versus contractors—the original classifications were created during a time when the gig economy of today did not exist. While regional initiatives have been undertaken to grapple with this topic—such as Ontario’s Sharing Economy Framework<sup>87</sup>—interviewees asserted that a cohesive Canadian approach is needed. This approach could benefit from an analysis of existing models and advancements (as well as challenges and stumbling points) in other global jurisdictions.

The US National Labor Relations Board (which enforces federal labour union laws) asserts that gig workers are independent contractors, not employees, and consequently cannot unionize.<sup>88</sup> However, in the spring of 2019, the state of California passed legislation AB 5 that seeks to provide protections for gig workers and independent contractors by making it less likely that employees can be misclassified as independent contractors. This bill codifies a strict “ABC test” to determine a worker’s employment status and places the burden of proof on employers. Specifically, to classify a worker as an independent contractor, employers in California are required to prove the following:

- A** the worker is free from the control and direction of the hirer in connection with the performance of the work, both under the contract for the performance of such work
- B** the worker performs work that is outside the usual course of the hiring entity’s business
- C** the worker is customarily engaged in an independently established trade, occupation, or business of the same nature as the work performed for the hiring entity.<sup>89</sup>

Failure to meet all three of these conditions will result in the worker being classified as an employee. The bill also aims to close loopholes in existing legislation on payroll tax, which have resulted in an estimated \$7 billion in tax revenue losses in state of California.<sup>90</sup> AB 5 is seen as one of the most significant and progressive developments in gig economy regulation, worldwide; some have asserted that it may be the catalyst that re-envision the rules of the entire gig economy.<sup>91</sup>

## Gig Worker Unionization

Another regulatory consideration is the need for a body that represents gig workers—a union. One subject-matter expert interviewed in this study specifically noted that globally there does not exist a body or organization that represents, addresses or identifies the concerns or needs of gig workers. According to this interviewee, without such a body, there is significant risk that many important realities tied to gig work may remained unrecognized and untouched.



An example is gig workers who are “multi-jobbers.”<sup>92</sup> These are workers who, often lacking high-demand skills, are increasingly required to take on multiple jobs with low pay to make ends meet. Specific to this, one interviewee—an international expert on gig work—highlighted the need for regulation that considers the wider realities of workers most impacted by the gig economy.

Over the years, gig workers of various types have sought unionization. Their success varies widely from country to country. Food delivery drivers in Japan and Norway were successful in their unionization efforts at the end of 2019.<sup>93</sup> In January 2020, the United Food and Commercial Workers Union applied to unionize Uber Black limousine and SUV drivers in Toronto.<sup>94</sup> If successful, this would mark one of the first examples of unionized gig work in Canada.

At the same time, other Canadian gig workers are also seeking better representation.<sup>95</sup> In September 2019, the Ontario Labour Relations Board began hearings on the classification (employee or independent contractor) of food delivery couriers. One of the topics of discussion was around whether couriers should be eligible to vote in a union drive. Ultimately, Ontario’s Labour Relation Board ruled that Foodora couriers are dependent contractors and eligible to unionize.<sup>96</sup> A dependent contractor is classified as *“a person... who performs work or services for another person for compensation or reward on such terms and conditions that the dependent contractor is in a position of economic dependence upon, and under an obligation to perform duties for, that person more closely resembling the relationship of an employee than that of an independent contractor.”*<sup>97</sup> Although Foodora has since initiated bankruptcy proceedings in Canada (many believing the decision to be tied to concerns about this new requirement for worker classification), the recent *Canadian Union of Postal Workers v Foodora Inc.* decision is an essential landmark that can set the stage for further regulation around the Canadian gig economy and workers’ rights.

# Conclusion

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The development of key platforms such as UpWork, Uber, Airbnb and others have spurred interest and participation in informal and remote work in recent years. Remote work, the gig economy, and the sharing economy are three concepts that are commonly described as the backbone of the “future of work.”

For those with high-demand digital skills, who participate in the gig economy by choice, earning potential tends to be high and remote work is a viable option; for those who are unable to find the full-time work that they desire, participating in the gig economy may serve to perpetuate precarious financial circumstances and, in the case of global health crises like the COVID-19 pandemic, can even put workers at risk.

Debate surrounding these new ways of working must acknowledge both the opportunities and undesired consequences. Crucial considerations include policy, regulation, and the long-term effects of these modes of employment.

Technological innovation paired with flexibility, labour market opportunities, and remote work have resulted in substantial growth of the digital platform economy. While the concept of remote work has gained ground in recent years, the disruption caused by the COVID-19 pandemic has accelerated its adoption. Many businesses and workers globally are experiencing what is being dubbed as the world’s “first mass experiment in remote work.” Advocates view this as an opportunity to further highlight the benefits of remote work and are calling to extend large-scale work-from-home arrangements even after the pandemic risk is contained. Others worry that this new reality has only highlighted the existing and growing class divisions between those who are able to work remotely—often full-time workers with secure employment—and essential workers who do not have this capability and rely on precarious gigs that often lack job security, paid sick leave, health insurance, and employment benefits. All of this is further compounded by the reality that remote work also ushers in global competition for skills and talent.

The changing nature of a work is a complex subject with many moving parts. COVID-19 has shown that the future of work can appear suddenly, opening notable new opportunities alongside undesirable consequences. Although overall and long-term impacts of these changes are yet to be determined, one thing is clear: our traditional work structures are shifting. With that shift comes the need for an agile, increasingly flexible and digitally skilled workforce that can adapt to these new realities—in some cases, literally overnight.

# Appendix

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## Research Methodology

This report was developed using a combination of primary and secondary research. Specifically, the findings of the report were generated from key informant interviews with industry leaders and subject-matter experts on remote work, the sharing economy, and the gig economy. An advisory group was developed to discuss and validate research findings.

### *Primary Research*

The primary research component of this study was based on key informant interviews with subject-matter experts and industry leaders on the gig and sharing economy. In addition, an advisory committee comprised of experts was created, with the goal of providing additional feedback and guidance, as well as validating research findings. Below are the details pertaining to the key informant interviews and advisory committee for this study.

**Key Informant interviews:** a total of six (6) key informant interviews were completed with industry experts and researchers on the future of work. Interviewees were senior representatives of their organizations capable of speaking to topics like remote work, gig work, precarious employment, and sharing economy trends and consumer realities.

**Advisory committee:** eight (8) industry experts and researchers formed the advisory committee for this project. The committee met twice during the course of this study: first in 2019 and again in 2020 as this study concluded. The study was initially meant to be finalized in 2019, but the onset of the COVID-19 pandemic created notable ripples for the concept of the “future of work,” which required inclusion.

### *Secondary Research*

The secondary research component of this study was comprised of a thorough literature review of domestic and international literature on the future of work, that took shape in two phases. Phase one was completed in 2019 and included research on the gig economy (update, historical data trends, benefits, drawbacks, high-skilled gig workers, precarious work, etc.), the sharing economy (history of the sharing economy, key platforms, consumer trends and use, etc.), and remote work (history of remote work, trends, benefits and drawbacks, etc.). A second phase of literature review was completed in 2020 as a result of the COVID-19 pandemic; this review included an analysis of COVID-19 on remote work, the gig economy, and the sharing economy, addressing concepts like precarious work, regulatory trends and needs, the future of remote work, etc. In addition, statistical analysis was completed using secondary data obtained from the OECD, Statistics Canada, and other relevant sources.

## Limitations of Research

While every attempt was made to present a balanced and holistic analysis of the key trends categorizing the “future of work” and its associated economic, labour and social impacts, some limitations exist. These include: the limited number of Canadian business leaders and industry experts available to provide in-depth insights and feedback on these trends; the relatively new admission of many of these platforms into the Canadian economy versus other international jurisdictions; and the limited and sometimes conflicting availability of statistics that measure, track, or quantify the size and growth of these economies. This study is meant to act as an introduction into this topic, highlighting potential challenges and opportunities for Canada and Canadians. ICTC has done its best to ensure that this research is timely and accurate by highlighting the impact of COVID-19 on these new methods and models of working. However, further research is required to accurately identify and monitor changes and impacts on a long-term basis and to track regulatory changes, generational differences, and the impact of international trends and competition on the growth of these models in Canada.

## Endnotes

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