CHAPTER 4
How Inclusive Is the Online Gig Economy?

4.1 INTRODUCTION

By providing flexibility in location and time, reduced friction in matching customers and clients, and low entry barriers, online gig work provides opportunities for individuals who face constraints in accessing the local offline labor market. Women prefer flexible work arrangements to balance household responsibilities. Youth work on online gig platforms to try different occupations and learn skills for future career development. People with disabilities and those in rural areas who face mobility barriers and have limited locally available job opportunities could get access to a broader job market through online platforms. Additionally, people use gig work to earn supplemental income.

This chapter discusses how online gig workers compare with other workers in six aspects of inclusion (age, gender, skills, location, language, and employment and income patterns), using available data from the latest labor force and household surveys from the I2D2 database.[92] This chapter examines the following:

1. Differences between online gig workers on local and global platforms,
2. Differences between online gig workers and
    - Workers in the services sector,
    - Informal workers, and
    - Workers with similar occupations, who were identified by matching the typical task categories found on online gig work platforms (including business and professional services, information technology (IT) and software development, and microtasks) to similar occupational codes (the mapping of occupational codes is provided in appendix G and has some limitations).

4.2 METHODOLOGY

The analysis is based on data from several survey instruments:

- **Global RDIT survey in 17 countries**. The primary data source for this analysis is a global RDIT web survey conducted by the team in 17 countries in six regions, using random domain intercept technology (RDIT; see appendix D).

[92] The International Income Distribution Database (I2D2) developed by the World Bank is a collection of harmonized household and labor force surveys (LFSs).

- **Ten platform-based surveys,** including nine online freelancing and one microwork platform survey conducted between April and December 2022 (Table 4.1). All nine online freelance platforms were regional/local in nature. The surveys were conducted in collaboration with the nine freelancing platforms, relying on a variety of distribution channels, including emails sent by the platforms to gig workers and promotion of the survey on the platforms. The survey conducted in the microwork platform was posted as a task, and online gig workers were invited to complete the survey just as they would complete any other task. The number of responses across the surveyed platforms varied from fewer than 50 (in four platform surveys) to more than 700 (in four platform surveys, with the highest number for one survey being 3,600). The analysis used the platform surveys with high response rates (see appendix E for a detailed description of the platform surveys).
- **Five country-level deep dive surveys** conducted in collaboration with World Bank country teams from Social Protection and Jobs (SPJ), Social Sustainability and Inclusion (SSI), and Digital Development (DD). The country deep dives were done in Bangladesh, Indonesia, Kosovo, Malaysia, and Pakistan. The team received platform data from Malaysia-based platform eRezeki (2016–20) and the GLOW PENJANA program[93] (2020–21), provided by the Malaysia Digital Economy Corporation (MDEC) and analyzed with support of World Bank colleagues in Malaysia. In Indonesia, the study team collaborated with the SPJ team, who conducted a large survey of over 4,000 informal workers; the SPJ team also supported the effort with data analysis. In Pakistan, we worked with the SSI country team, which had implemented an operation in Khyber Pakhtunkhwa (KP) and was keen to roll out an end-of-operation survey. We worked with the team to conduct the survey. In Kosovo, we worked with the DD team to trace beneficiaries of a DD pilot on gig work. In Bangladesh, we worked with client counterparts in the Ministry of Information and Communications Technology (ICT) to roll out a small-scale survey of gig workers. See appendix E for further details.
- **Aggregate data from platforms** provided by four online gig work platforms and projects.
- **Interviews with 28 platforms,** including 24 regional/local platforms and 4 global platforms. Semistructured interviews were conducted with the founder, CEO, or senior management of each platform between summer 2021 and autumn 2022 (see also chapter 3 and appendix F for a detailed overview).
- **Focus group discussions with select gig workers.** Focus group discussions were conducted with Kenyan online freelancers using the Onesha platform in December 2022 and with Pakistan-based online freelancers using a variety of gig work platforms in August 2022.

Limitations. The analysis in this chapter has some data limitations. First, the comparison of online gig workers to workers with similar occupations is restricted to eight countries for which the labor force surveys (LFSs) and household surveys contained enough information on occupational codes for an accurate analysis. The eight countries are Argentina, Bangladesh, India, Mexico, Pakistan, the Philippines, South Africa, and Tunisia (see appendix D). Second, the comparison between online gig workers and informal sector workers is restricted to four regions on the basis of data availability: Africa, Latin America and Caribbean, Middle East and North Africa, and South Asia (see also appendix D, which provides further details on the methodology for analyzing the global RDIT survey data and limitations).

[93] The GLOW PENJANA program was developed by MDEC as a spin-off to the eRezeki platform to support individuals affected by the COVID-19 pandemic. The program provides training to aspiring online gig workers.

TABLE 4.1: Platforms featured in the study (includes survey data and data provided by the platform)

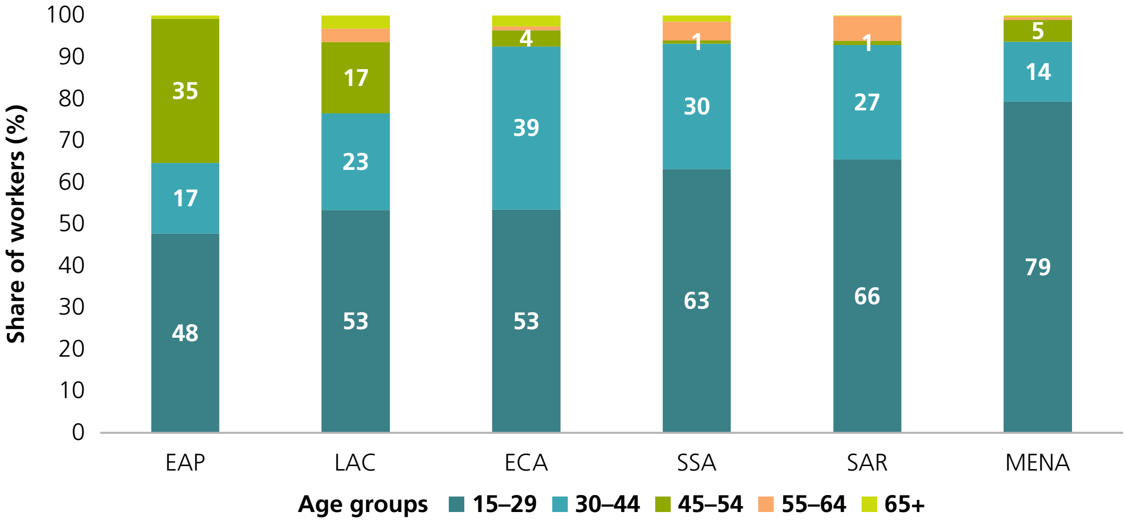
Platform	Region	Type of data
Elharefa	MENA	Survey (n = 41) and platform data
eRezeki platform and GLOW PENJANA program	EAP. These are initiatives of the Malaysian government agency MDEC to support online gig work.	Platform data
Flexiport	SA	Survey (n = 11) and platform data
Jolancer	AFR	Survey (n = 19) and platform data
Microworkers	Global microwork platform	Survey data (n = 1,073)
Onesha	AFR	Survey (n = 82) and platform data
SheWorks!	LAC	Survey (n = 36) and platform data
SoyFreelancer	LAC	Survey data (n = 325)
Truelancer	SA	Survey (n = 746) and platform data
Workana	LAC (with a regional office in EAP as well)	Survey (n = 3,697) and platform data collected in collaboration with the Inter-American Development Bank
Wowzi	AFR	Survey (n = 960) and platform data
YouDo	ECA	Platform data

Source: Study team compilation.
Note: AFR = Africa; EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SA = Southeast Asia; MDEC = Malaysian Digital Economy Corporation.

4.3 AGE

Online gig work platforms tend to attract youth. Most online gig workers tend to be youth under the age of 30, mostly students or young professionals at the beginning of their careers. More than half of online gig workers are under 30, and the results hold true across most regions except for East Asia and Pacific, where the share of youth is slightly smaller (48 percent; figure 4.1). In this respect, there is no significant difference between global platforms and regional/local platforms.

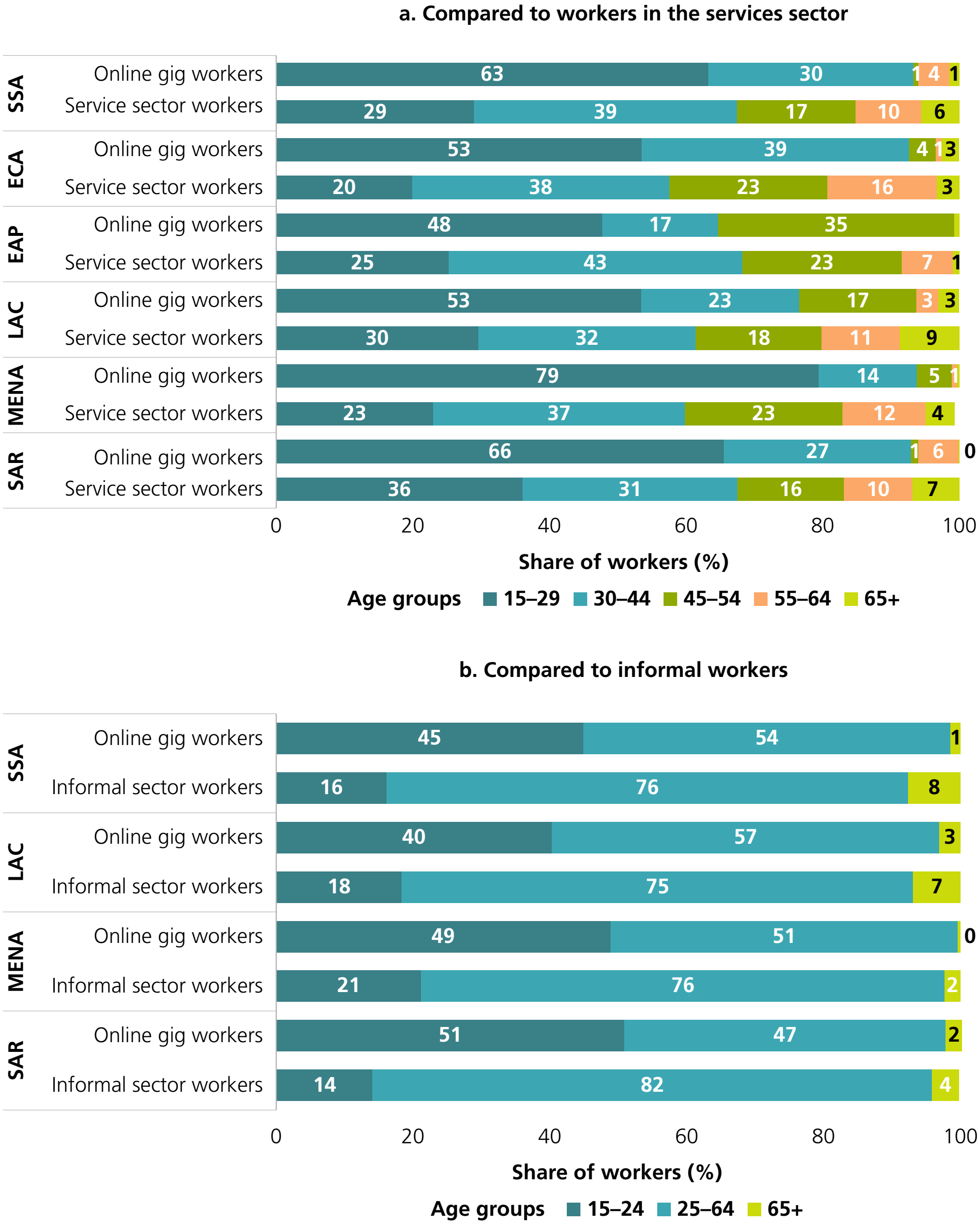
FIGURE 4.1: Age composition of online gig workers in the global survey



Source: Global RDIT survey conducted by the study team.
Note: EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

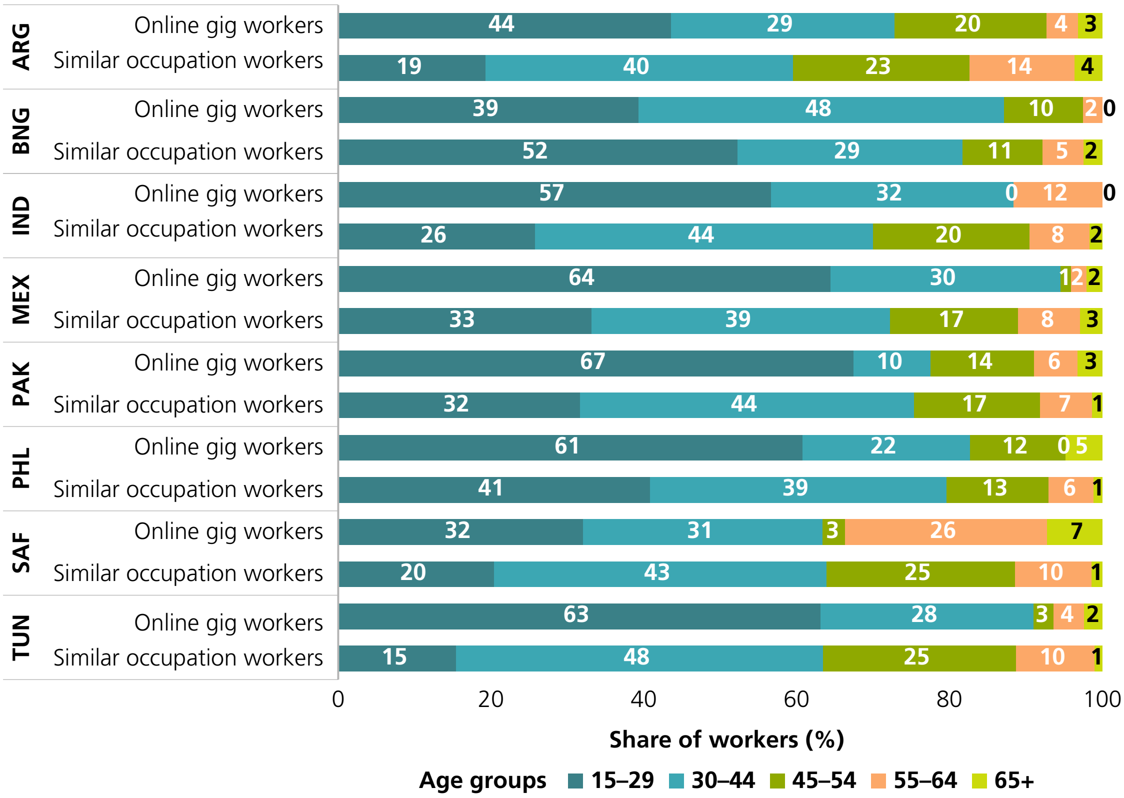
Online gig workers are younger than workers in the services sector, workers with similar occupations in the labor market, and workers in the informal sector. Across regions, the portion of youth among online gig workers is significantly greater than that in the services sector and in the informal sector (Figure 4.2). Results from eight countries show a similar pattern of a significant share of online gig workers younger than workers with similar occupations in the labor market, and in some cases the difference is sizeable (Figure 4.3). For instance, over 63 percent of online gig workers in Mexico, Pakistan, and Tunisia are under 30, a much larger proportion than in the labor force (between 15 and 33 percent).

FIGURE 4.2: Age composition of online gig workers, by region



Source: Study team analysis of Global RDIT survey and labor force and household surveys.
Note: The values for online gig workers by region differ between the two figures because the comparator countries vary in data availability. The online gig worker estimates include the same countries in each region as those for which the team had labor force surveys. For a list of countries and labor force surveys used, please refer to appendix D, specifically tables D.4 and D.5. EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

FIGURE 4.3: Age composition of online gig workers compared to workers in similar occupations, by country



Source: Study team analysis of global RDIT survey and labor force and household surveys. Please see table D.6 in appendix D for the list of countries and labor force surveys used.
Note: ARG = Argentina; BNG = Bangladesh; IND = India; MEX = Mexico; PAK = Pakistan; PHL = the Philippines; SAF = South Africa; TUN = Tunisia.

Data from platform-based surveys also confirm the greater proportion of youth. For instance, over half of the respondents on Truelancer, an online freelancing platform based in India, were youth, with an even higher proportion (61 percent) for the global microtask platform Microworkers (see Figure 4.4, panel a). Microwork is seen as a good source of supplementary income for young people (Cedefop 2021). Wowzi, a Kenya-based platform specializing exclusively in "influencer" marketing tasks, had almost 90 percent youth freelancers (or influencers)[94] because of its focus on new social media skills. The Latin American platforms Workana and SoyFreelancer also showed significant shares of young workers: 50 and 40 percent, respectively.[95]

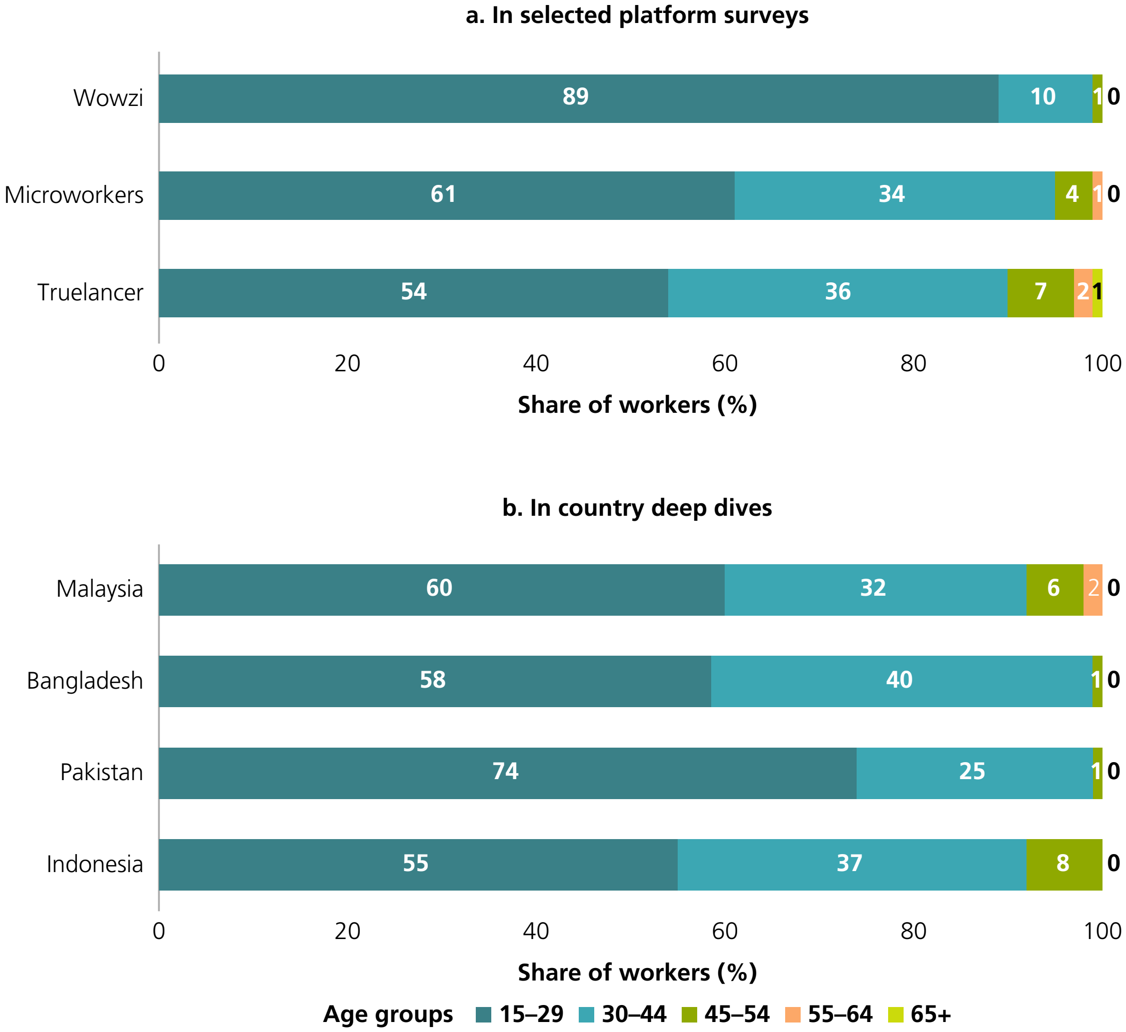
The study team's country deep dives confirm the dominance of youth on gig platforms (Figure 4.4, panel b). More than half of the survey respondents in Bangladesh were 20- to 30-year-olds, while in Pakistan, both the average and the median ages of respondents to the team's survey were 26 years. In Indonesia, over 50 percent of the online gig workers are below 30 years old, compared to 24 percent of the informal-sector workers. Existing studies on global trends in gig work suggest a similar age pattern, with online platform workers tending to be below the age of 35.[96]

[94] The share is based on the number of freelancers using Wowzi who provided information about their age to the platform. The proportion is confirmed by data collected through a survey conducted by the World Bank on the Wowzi platform.

[95] The data presented are based on an internal survey conducted by Workana Latin America among its user base and confirmed through the survey conducted by the World Bank and Inter-American Development Bank for this study.

[96] Several studies confirm this profile, for instance ILO (2021a, 2021b), Goldfarb (2019), and in the European Union, Pesole et al. (2018), Urzì Brancati, Pesole, and Férnandéz-Macías (2020), and Cedefop (2021).

FIGURE 4.4: Age distribution of online gig workers



Source: Analysis of platform surveys and country deep dives conducted by the study team.
Note: Data for Malaysia indicate registered users on the eRezeki platform in 2020.

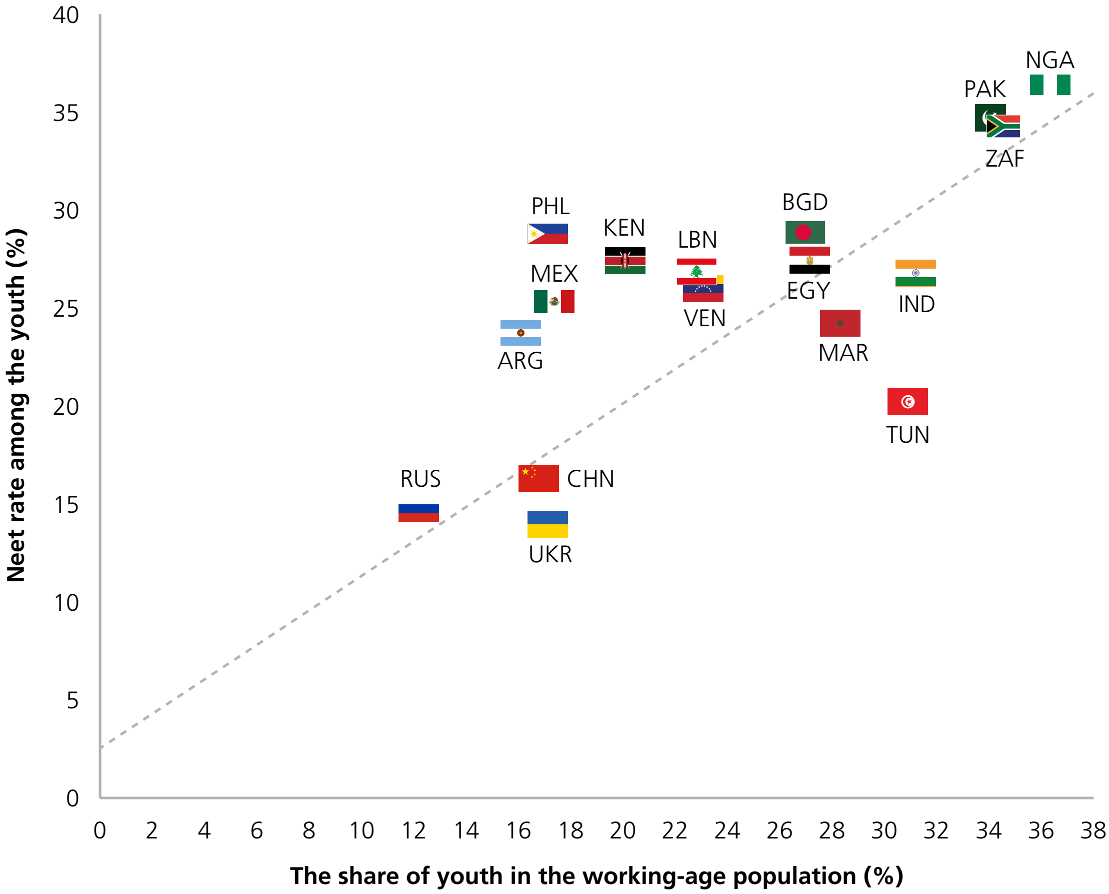
Digital gig work attracts young people for several reasons. The study survey found three key reasons that online gig work platforms appeal to youth: the chance to learn new digital skills, especially for someone at the beginning of their career; the flexibility of online work; and the ability to earn additional income. Most youth gig workers have another job or are students, findings that are similar to those of other studies (ILO 2021b). In countries with high youth unemployment rates, gig work could provide a path to integrate youth into the labor market.[97]

Opportunities in the online gig economy can play an important role in countries struggling with high levels of youth unemployment or underemployment. For countries with growing cohorts of youth, online gig work can provide young people with work opportunities beyond what is available in the traditional labor market (UNDESA 2022). Countries struggling with high youth unemployment rates or high rates of youth not in employment, education, or training (NEET),

[97] See ILO news release, "Global Youth Unemployment is on the Rise Again," August 24, 2016, https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_513728/lang--en/index.htm.

like Nigeria (36 percent) and Pakistan (34 percent),[98] could provide targeted support to youth to access online gig jobs (figure 4.5; see also chapter 7).

FIGURE 4.5: Proportion of youth in the working-age population and NEET rate among youth in the 17 countries in the global survey



Sources: ILOSTAT and UNDESA. ILOSTAT data are from 2021 and 2022; UNDESA data are from 2022.
Note: ARG = Argentina; BGD = Bangladesh; CHN = China; EGY = Arab Republic of Egypt; IND = India; KEN = Kenya; LBN = Lebanon; MAR = Morocco; MEX = Mexico; NGA = Nigeria; PAK = Pakistan; PHL = the Philippines; RUS = Russian Federation; TUN = Tunisia; UKR = Ukraine; VEN = República Bolivariana de Venezuela; ZAF = South Africa. NEET = not in employment, education, or training.

4.4 GENDER

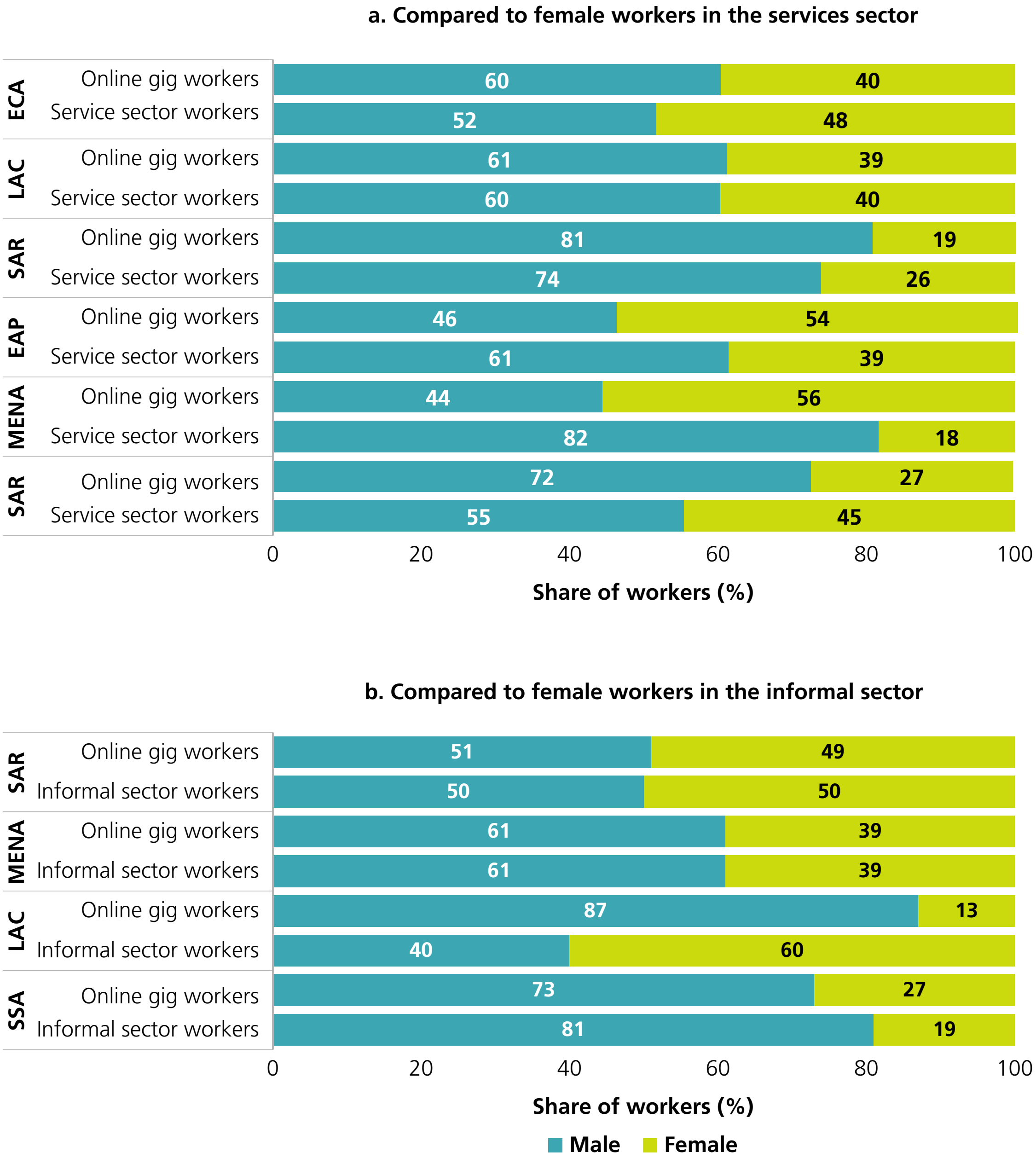
Globally, women participate in online gig work to a greater extent than in the general labor market. The survey found that 42 percent of online gig workers are women, a larger proportion than in the global labor force (39.7 percent as of 2021).[99] By region, the share of women in online gig work varies between 19 percent in the South Asia region and 56 percent in the Middle East and North Africa (figure 4.6, panel a). In some cases, the portion of women in online gig work is significantly greater than that for the services sector (in East Asia and Pacific and the Middle East

[98] ILO, "ILO Modelled Estimates (ILOEST database)," 2022, https://ilostat.ilo.org/resources/concepts-and-definitions/ilo-modelled-estimates/.

[99] World Bank, WDI database. Estimates are based on data obtained from the ILO and the United Nations Population Division, https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS.

and North Africa; figure 4.6, panel a) and the informal sector (in the Middle East and North Africa; figure 4.6, panel b). The share of women among gig workers is greater on global platforms than on regional platforms (45 versus 27 percent).

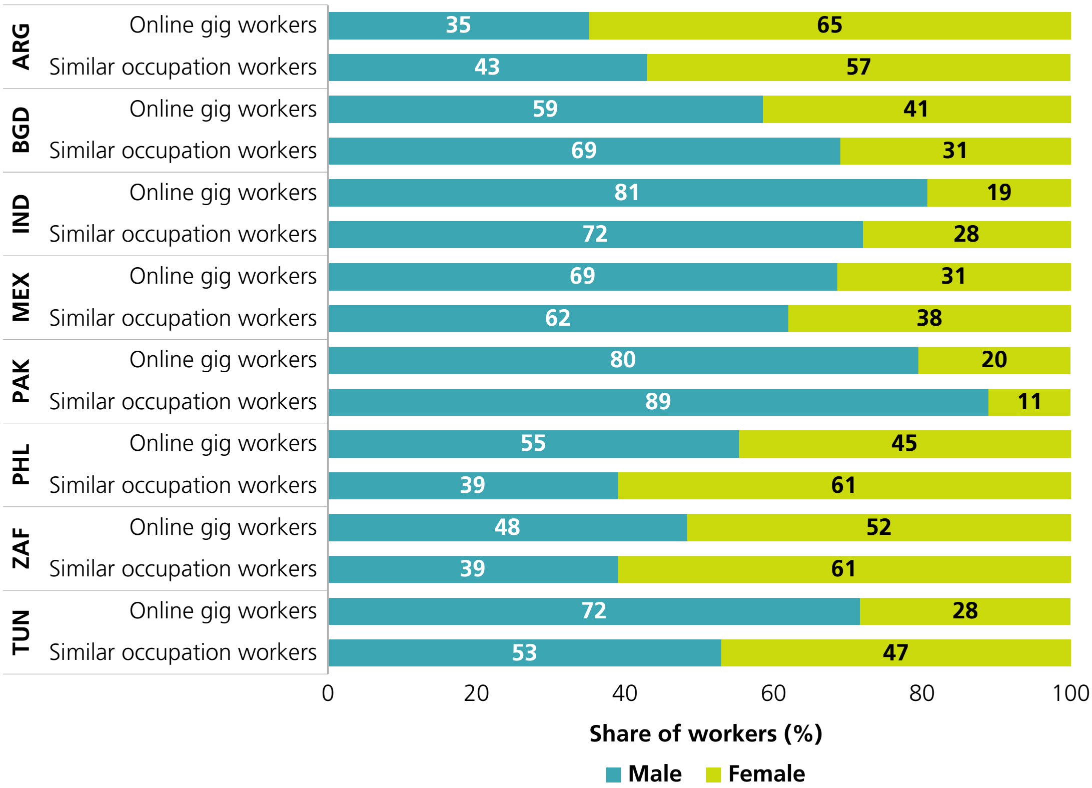
FIGURE 4.6: Share of female online gig workers, by region



Source: Study team analysis of global RDIT survey and labor force and household surveys. See tables D.4. and D.5 in appendix D.
Note: The values for online gig workers by region differ between the two figures because the comparator countries vary in data availability. The online gig worker estimates refer to the same countries in each region as those in the labor force surveys (LFSs). For a list of countries and LFSs used, please refer to appendix C, specifically tables C.4 and C.5. ECA = Europe and Central Asia; EAP = East Asia and Pacific; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

The potential of online gig work to support female labor force participation has not been fully tapped. Results from eight countries in the team's global survey[100] show that while women are starting to participate to a greater extent in the online gig economy than in the general workforce in similar occupations, they remain underrepresented in several countries (figure 4.7). In Argentina, Bangladesh, and Pakistan, women account for greater shares of online gig workers than in the broad labor force. In Argentina, in fact, women account for almost two in three online gig workers (57 percent). At the same time, in countries including India, the Philippines, South Africa, and Tunisia, the share of women in the online gig economy is much more limited than the share of women in similar occupations in the workforce at large. Other studies have found overall similar results[101] and have pointed to a smaller proportion of women (2 in 10) in online gig work in developing countries (ILO 2021b). In India, fewer than 2 in 10 platform workers were women (ILO 2021a). Among the G20 countries, Italy has the largest portion of women online gig workers (58 percent) (ILO 2021a).

FIGURE 4.7: Proportions of female online gig workers compared to female workers in similar occupations in selected countries



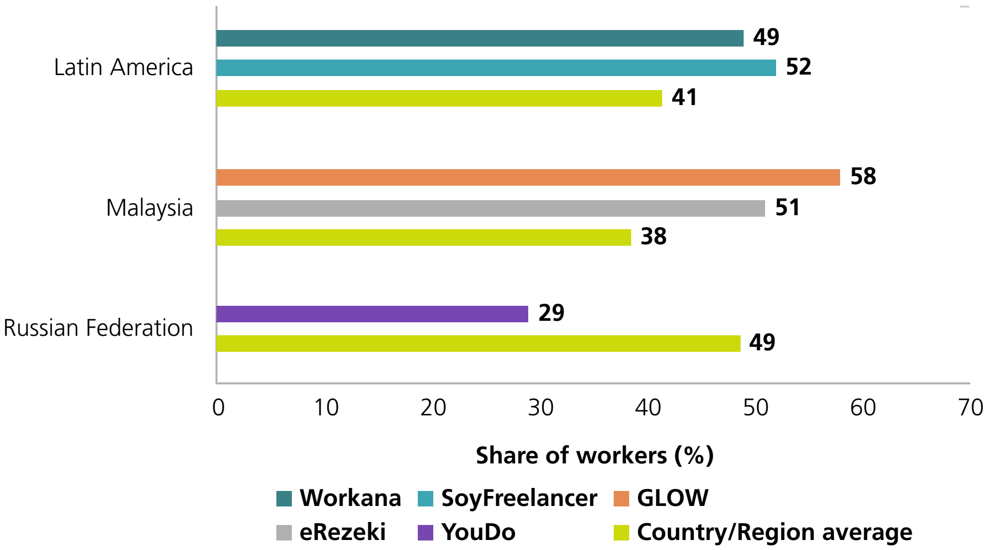
Source: Study team analysis of global RDIT survey and labor force and household surveys. See table D.6 in appendix D for the list of countries and labor force surveys used.
Note: ARG = Argentina; BGD = Bangladesh; IND = India; MEX = Mexico; PAK = Pakistan; PHL = the Philippines; ZAF, South Africa; TUN = Tunisia.

Some countries and gig platforms are doing better in including women. The country deep dive in Indonesia shows a greater share of women in online gig work than in the informal sector (50 versus 31 percent). In Malaysia and Latin America, online gig work enables more women to engage in paid work than the general labor market does (Figure 4.8). In Malaysia, the eRezeki and

[100] The comparison was developed for those countries for which the labor force and household surveys contained enough information on occupational codes for an accurate analysis.
[101] ILO (2021b) found that 4 in 10 online gig workers are women.

GLOW PENJANA programs (online gig work programs supported by the Malaysian government) show a percentage of women users (over 50 percent) higher than the general labor force participation of women (38 percent). A higher percentage of women is also reported for SoyFreelancer (52 percent) and Workana (49 percent). On YouDo, a Russian online gig work platform, however, the vast majority of registered users (71 percent) are male. Compared to the share of women in the offline Russian labor force (48.6 percent), women engage to a lesser extent on YouDo.

FIGURE 4.8: Women's participation in the labor force and in online gig work platforms

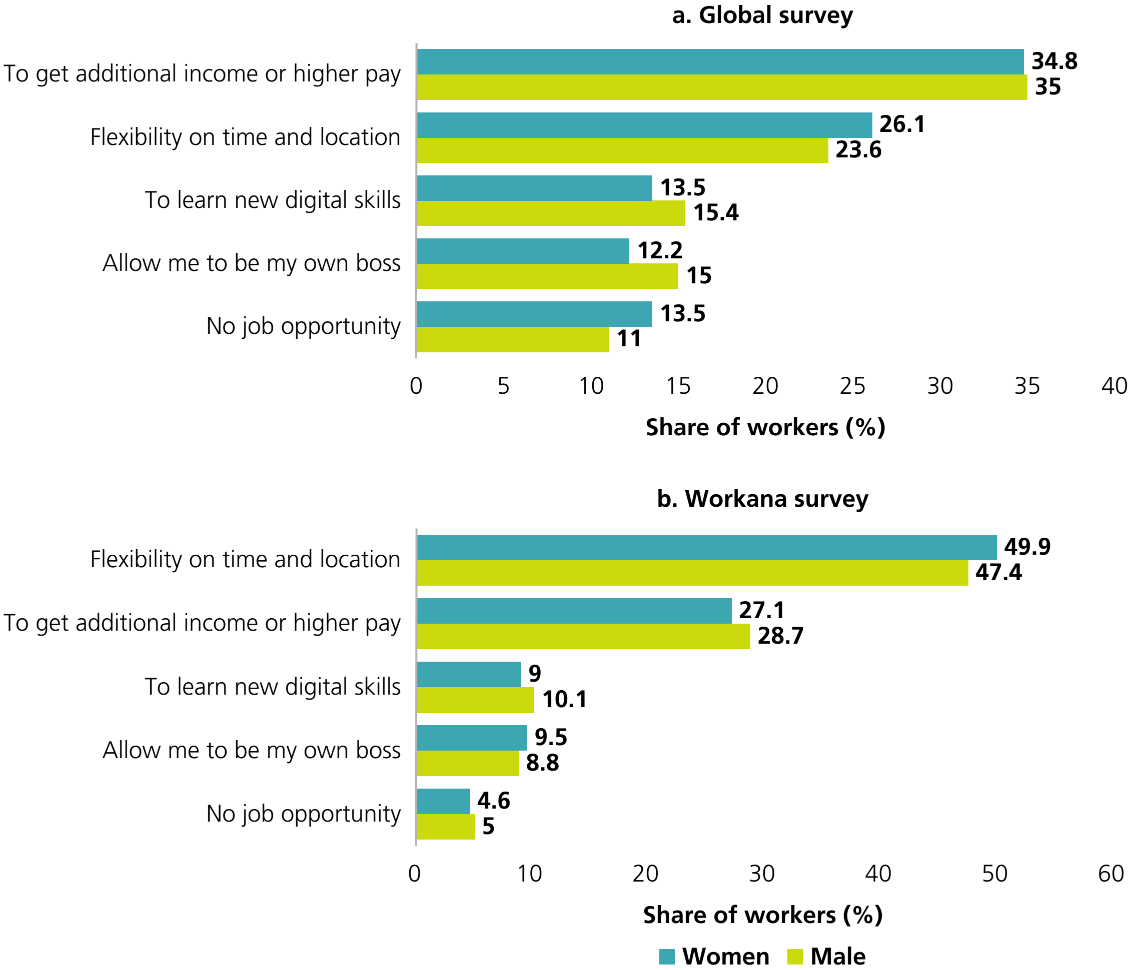


Sources: Country/regional averages were retrieved from WDI. The percentages of women gig workers by platform are based on platform and survey data collected for this study.
Note: The country/region average shows the share of women in the total workforce in 2021.

The key drivers of women's participation in this market are the ability to earn additional income and the flexibility online work offers. The team's global survey shows that women most value those two attributes of online gig work. Women are more likely than men to do online gig work because they want to earn additional income and because they don't have other job opportunities, while men appreciate more the ability to learn new digital skills and the chance to be one's own boss (figure 4.9, panel a). Data at the platform level provide further evidence. For women working on Workana, flexibility in location and time was a more important motivating factor (figure 4.9, panel b). Flexible working hours can help women balance their caregiving responsibilities with the need to earn a living (Anwar and Graham 2020). In Africa, household survey data from nine countries[102] from 2017 and 2018 show that women are driven mainly by the need to control their schedule (over 60 percent), whereas this reason carries less weight for men. Conversely, the most important reason for men to join gig work platforms is to gain work experience for future job opportunities (over 65 percent of men compared to approximately 30 percent of women). However, flexibility comes with a caveat. When flexibility leads to fragmented work schedules, it may have a negative impact on the speed with which tasks are completed and on earnings; women tend to be particularly affected (Adams-Prassl 2020).

[102] The nine countries are Ghana, Kenya, Mozambique, Nigeria, Rwanda, Senegal, South Africa, Tanzania, and Uganda. The survey was conducted by Research ICT Africa, an ICT policy think tank. The data cover not only online web-based platform workers, but also location-based platform workers (Chen, forthcoming).

FIGURE 4.9: Main reason for doing online gig work by gender



Source: Study team analysis of global RDIT survey and the Workana survey conducted by the study team.
Note: The gender difference in the Workana survey is statistically significant at 5 percent for flexibility on time and getting additional income. In the global gig worker survey, males were more likely than their female counterparts to report that their motivation for engaging in online gig work is driven by the desire to be their own boss, have location flexibility, and learn new digital skills. These differences are statistically significant at 5 percent, with weights applied. On the other hand, females are more likely than males to report that the lack of job opportunities is a driving factor for their engaging in online gig work.

A more proactive and intentional approach to enroll women can make digital work more gender inclusive. One example of active support for the participation of women in online gig work is the Latin American platform SheWorks!. While the platform is not exclusively for women, most of the online gig workers using it are women because of the platform's emphasis on flexible working hours and the marketing strategy reflected in the platform's name. Networks and successful women freelancers sharing their experience with other women can be a catalyst for promoting the opportunities of online gig work among women (see Box 4.1 for an example from Pakistan).

BOX 4.1: JOURNEYS OF SUCCESSFUL WOMEN ONLINE FREELANCERS IN PAKISTAN

Two successful women online freelancers in Pakistan—Laraib Afzal and Anum Bakhtiar—started their online careers after studying software engineering and being faced with limited work opportunities in the field of information technology (IT). They joined the most popular online gig work platform in Pakistan, Fiverr, with very limited experience in online freelancing but with the desire to learn and to access more jobs in their preferred fields.

Becoming an online freelancer involved a significant amount of self-learning and learning by doing. Laraib developed her graphic design skills by watching YouTube videos, and both women learned to improve their freelancer profiles by analyzing other profiles and deriving best practices. While the start of their journeys was difficult and at times disheartening, with no or very few low-value orders received, by persevering in the process and continually learning, both Laraib and Anum managed to build successful profiles. In addition to their technical skills, soft skills have played a major role in securing their success, particularly skills in communication, managing clients, and having confidence in interactions with clients. In growing their business, management skills also became quite important, especially for overcoming challenges related to fluctuating income and the need to build a diverse portfolio of clients.

Anum is now running her own business in the world of online freelancing, specializing in graphic design and developer jobs. She currently works with several other women, training them in graphic design and in how to succeed in receiving jobs through Fiverr. Online freelancing is no longer the main career for Laraib, but she sees it as a valuable activity next to her full-time job, as it allows her to keep improving her skills and developing new ones. She is also seeking to further develop her experience as an online freelancer and establish an agency account in order to work with other online freelancers and share her acquired knowledge of the field.

4.5 SKILLS AND EDUCATION

Workers with a variety of skill levels are participating in the online gig economy, especially those with high-school-level education. Over 70 percent of online gig workers do not have a tertiary education degree (Figure 4.10). The participation of workers with basic and intermediate education shows that there are opportunities and there is growing awareness of online gig work across varied educational backgrounds. The fact that the team's global survey was conducted in multiple languages, not just in English, could explain the difference between our survey findings and the literature.[103] Knowledge of English in countries where English is not an official language may be correlated with a higher level of education.

[103] The ILO estimated in 2021 that over 60 percent of gig workers attained at least one university degree (ILO 2021b).

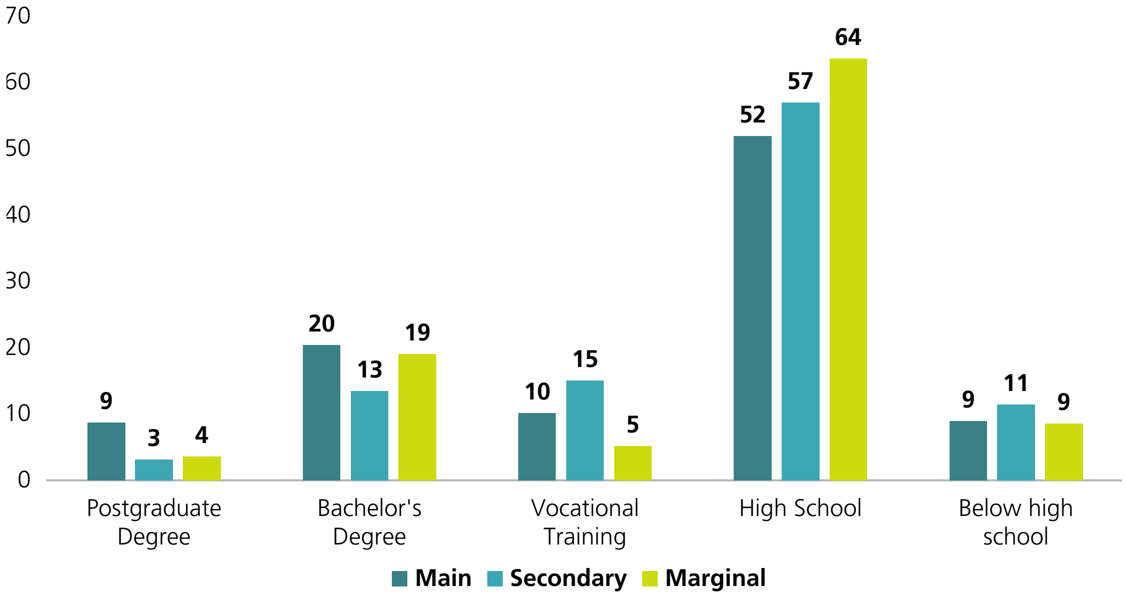
It is also important to assess whether skill levels affect the intensity with which people do gig work. Given the task-based nature of gig work, those doing gig work as a primary job may be different from those who do gig work sporadically. To understand work intensity, the gig workers were classified as main, secondary, or marginal workers depending on the extent to which gig work contributed to their overall income and the number of hours they worked on gig tasks (see Table 4.2). Workers with tertiary education are more likely to do online gig work as a main occupation than those with less education (Figure 4.10).

TABLE 4.2: Intensity of online gig work based on income earned as a share of personal income and hours worked

	Less than 10 hours a week	Between 10 and 20 hours a week	More than 20 hours a week
Less than 25 percent of personal income	Marginal	Secondary	Secondary
25 to 50 percent of personal income	Secondary	Secondary	Main
More than 50 percent of personal income	Secondary	Main	Main

Source: Adapted from Urzì Brancati, Pesole, and Férnandéz-Macías 2020.

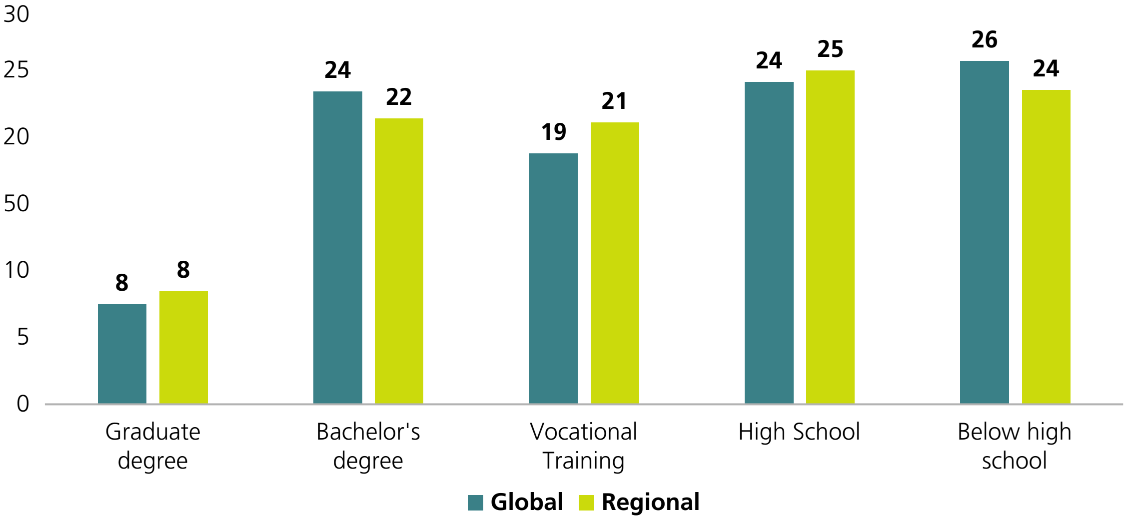
FIGURE 4.10: Educational backgrounds of online gig workers and intensity of online gig work



Source: Global RDIT survey conducted by the study team.
Note: Results are shown as percentages.

Local platforms tend to attract a slightly larger share of workers with intermediate education (high school and vocational) than global platforms. Almost half of the gig workers on local platforms have vocational or high-school-level training, while global gig platforms tend to attract slightly more diverse workers, at both the high-skills end (workers with a bachelor's degree) and the low-skills end (workers with below-high-school education) (Figure 4.11). However, the differences remain minor and may be due to the tasks available on regional/local platforms versus global platforms and the level of education required to complete such tasks (see chapter 3 for a discussion of tasks on global and regional/local platforms).

FIGURE 4.11: Educational backgrounds of online gig workers using global and regional/local platforms



Source: Study team analysis of global RDIT survey conducted by the team.
Note: Results are shown as percentages.

On average, online gig workers are more educated than workers in the services sector and the informal sector. In most regions, the share of online gig workers with advanced education is greater than that of workers in the services sector; Europe and Central Asia and East Asia and Pacific are the exceptions (figure 4.12, panel a). Online gig workers are significantly more educated than workers in the informal sector (only 3 to 12 percent of informal workers have advanced education) (figure 4.12, panel b).

FIGURE 4.12: Educational backgrounds of online gig workers, by region

a. Compared to workers in the services sector

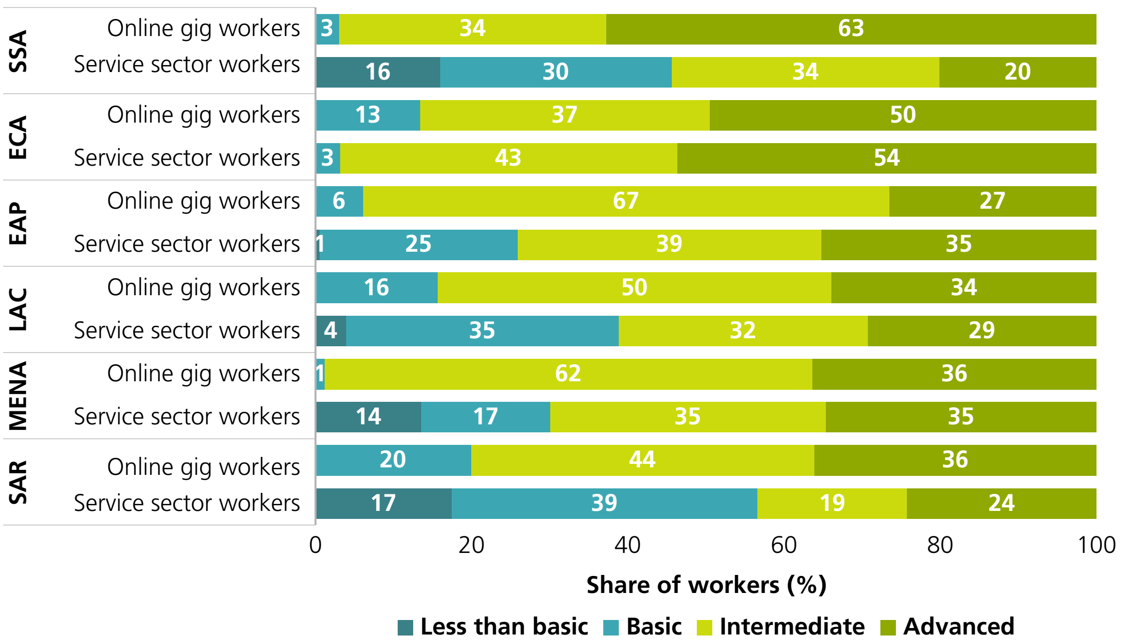


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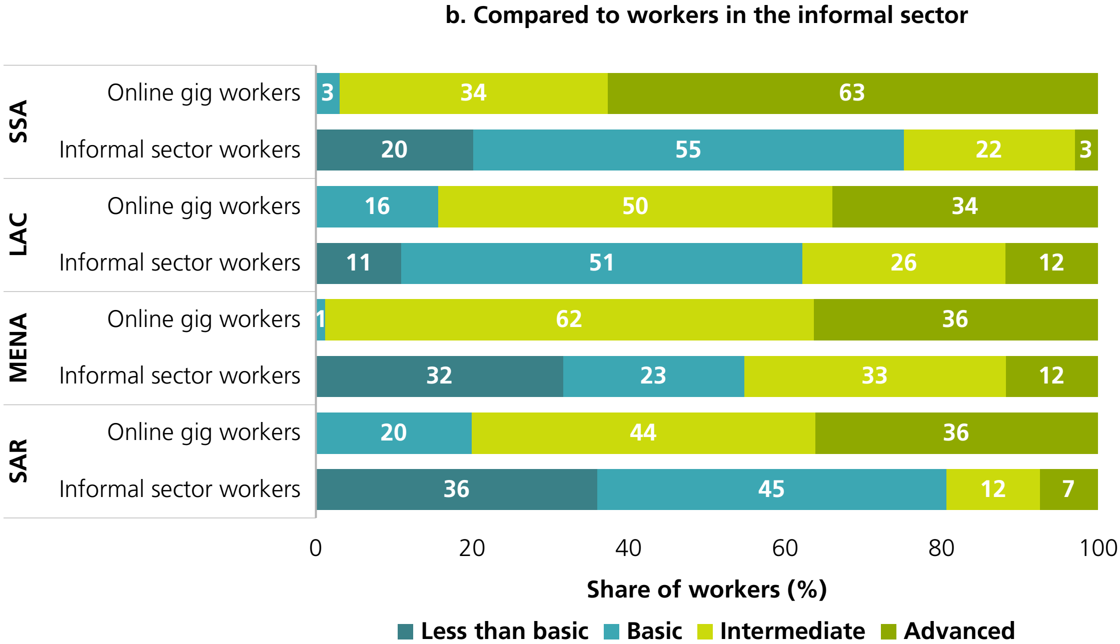
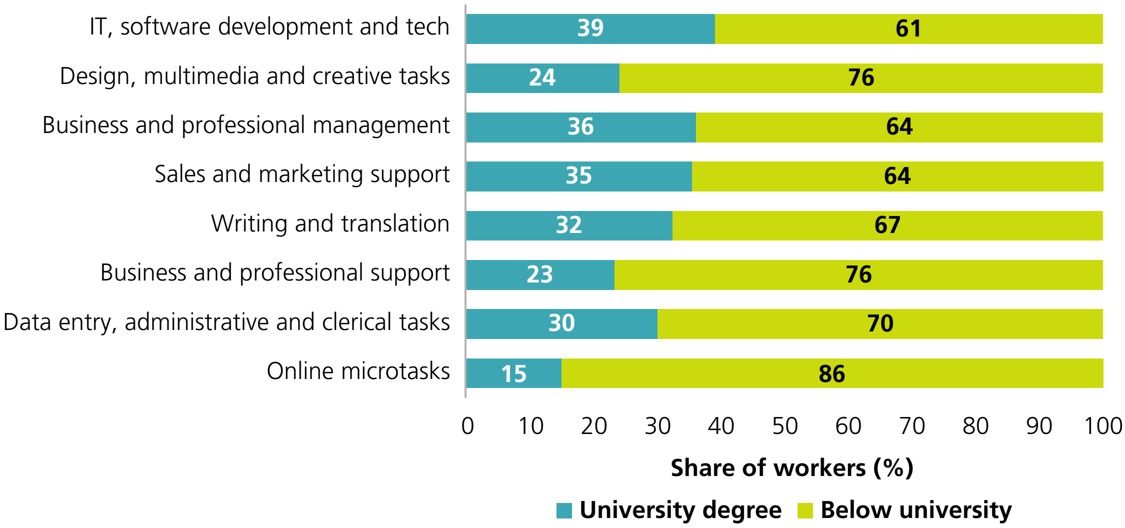
FIGURE 4.12: (Continued)



Source: Study team analysis of global RDIT survey and labor force and household surveys. See tables D.4. and D.5 in appendix D.
Note: The values for online gig workers by region differ between the two figures because the comparator countries vary in data availability. The online gig worker estimates refer to the same countries in each region as those in the labor force surveys (LFSs). For a list of countries and LFSs used, please refer to appendix C, specifically tables C.4 and C.5.
EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

Microtasks provide more opportunities than more-complex online freelancing tasks for low-skilled workers. Microwork generally includes repetitive, routine tasks, such as data classification, that can be performed relatively easily by following a set of instructions. Workers doing online microtasks tend to have a lower level of education (77 percent have only high school or less education, and only 15 percent have university-level education) than online gig workers who conduct complex tasks such as IT and software development (almost 40 percent have university-level education) and business and professional management (36 percent of gig workers have university-level education; see figure 4.13). The ILO also shows that online gig workers who do microtasks tend to be less educated than online gig workers who do more-complex freelancing tasks (64 percent of microworkers are highly educated, compared to 83 percent of freelancers) (ILO 2021b).

FIGURE 4.13: Highest level of education attained by online gig workers and their main online gig tasks



Source: Analysis of global RDIT survey conducted by the study team.
Note: IT = information technology.

Microtasks can help drive the inclusion of low-skilled workers. Data from the eRezeki platform and GLOW PENJANA program in Malaysia suggest that over 50 percent of online gig workers carry out data entry and clerical tasks rather than more-complex digital tasks or digitally enabled tasks such as delivery and domestic services. In comparison, only 8.3 percent of the overall labor force in Malaysia carries out similar tasks[104] (clerical support[105]), suggesting that online gig work opens up new opportunities for gig workers that are otherwise not that common in the general labor market. From this perspective, online gig work can also provide more opportunities for workers who are not highly skilled. This is particularly relevant since the majority of workers by occupation in Malaysia are concentrated in services and sales (24.3 percent), an occupation group that generally relies on workers with secondary education or postsecondary, nontertiary education. While administrative and clerical occupations are not among the most common in Malaysia, they are accessible since they do not require a high level of skills and thus may provide opportunities for a broad range of workers in the labor market.

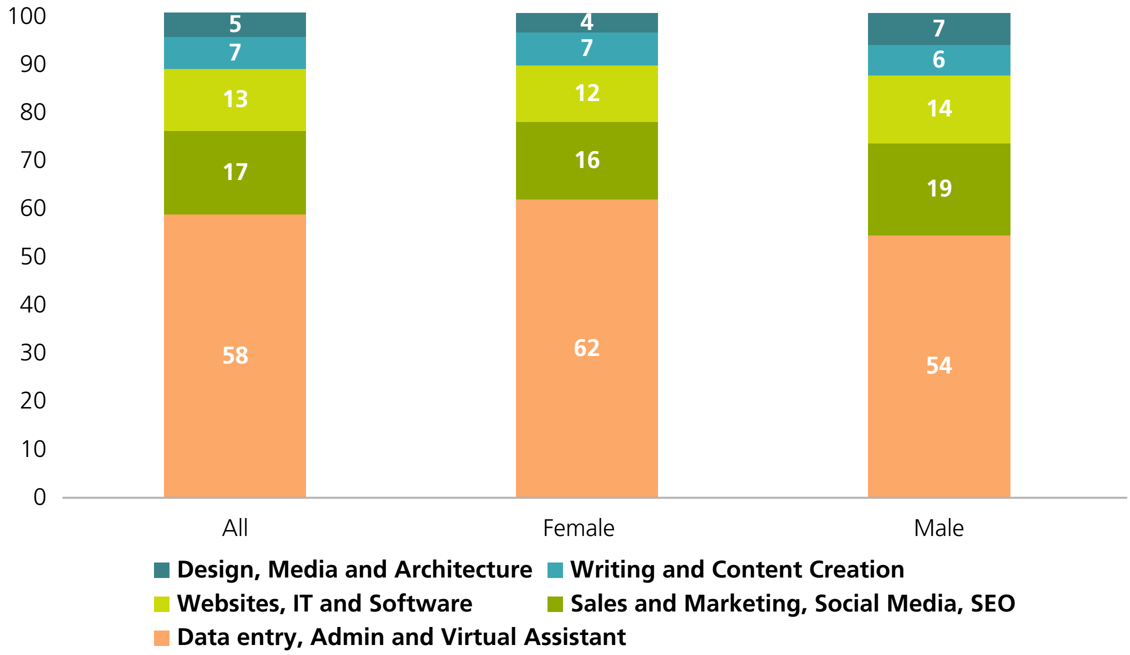
Online digital work replicates the occupational segregation observed in the offline labor market, with men dominating tasks that require higher-technology skills (such as IT and software development) and that pay more. On Workana, for example, the share of men doing IT-related tasks is very high compared to that of women (44 versus 5 percent). In contrast, the proportion of women working in sales and marketing, data entry, and online microtasks is higher than that of men. Similarly, on SoyFreelancer, another Latin American platform, IT-related tasks offer higher pay than data entry and online microtasks. In Malaysia, women also do data entry and administrative and clerical tasks to a greater extent than men on the GLOW program[106] (figure 4.19). Globally, women gig workers generally perform work in legal services, translation, writing and editing, business services, and sales and marketing more than men do, while men dominate work related to technology and data analytics (ILO 2021b).

[104] Based on data from 2020 (Department of Statistics Malaysia 2020).

[105] Data entry, administrative, and clerical tasks are equivalent to the job of clerical support workers, as defined by the International Standard Classification of Occupations ISCO-08, which include general office clerks, data entry clerks, secretaries and such (ILO 2012). The International Standard Classification of Occupations-ISCO-08 is available at https://www.ilo.org/ilostat-files/ISCO/newdocs-08-2021/ISCO-08/ISCO-08%20EN%20Vol%201.pdf.

[106] The GLOW PENJANA program was developed by MDEC as a spin-off to the eRezeki platform to support individuals affected by the COVID-19 pandemic. The program provides training to aspiring online gig workers.

FIGURE 4.14: **Share of users by gender and workstream, GLOW PENJANA program, Malaysia, 2021**



Source: Study team analysis based on Malaysian Digital Economy Corporation (MDEC) data.
Note: IT = information technology; SEO = search engine optimization.

Gig work requires more than just digital skills. In the study surveys, socioeconomic skills in particular are consistently mentioned as necessary for success on digital platforms. For Workana workers, communication skills and time management were listed as most important, alongside a set of other skills such as self-confidence; this observation holds true across education levels and genders (see Figure 4.15).

FIGURE 4.15: **Top skills for succeeding in online gig work, by education level and gender of online gig workers on Workana**

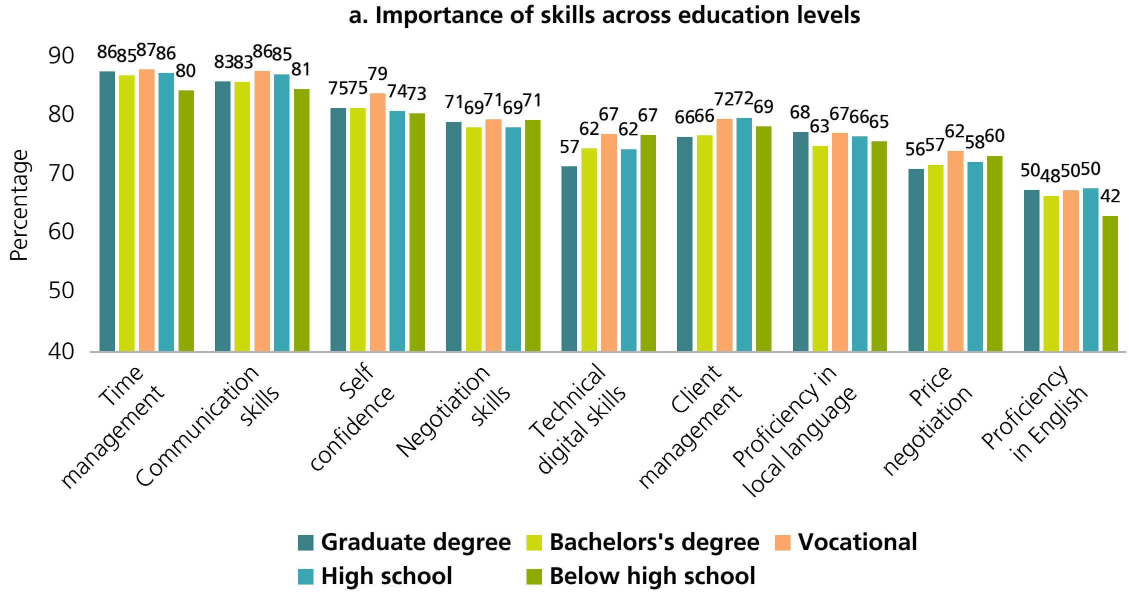


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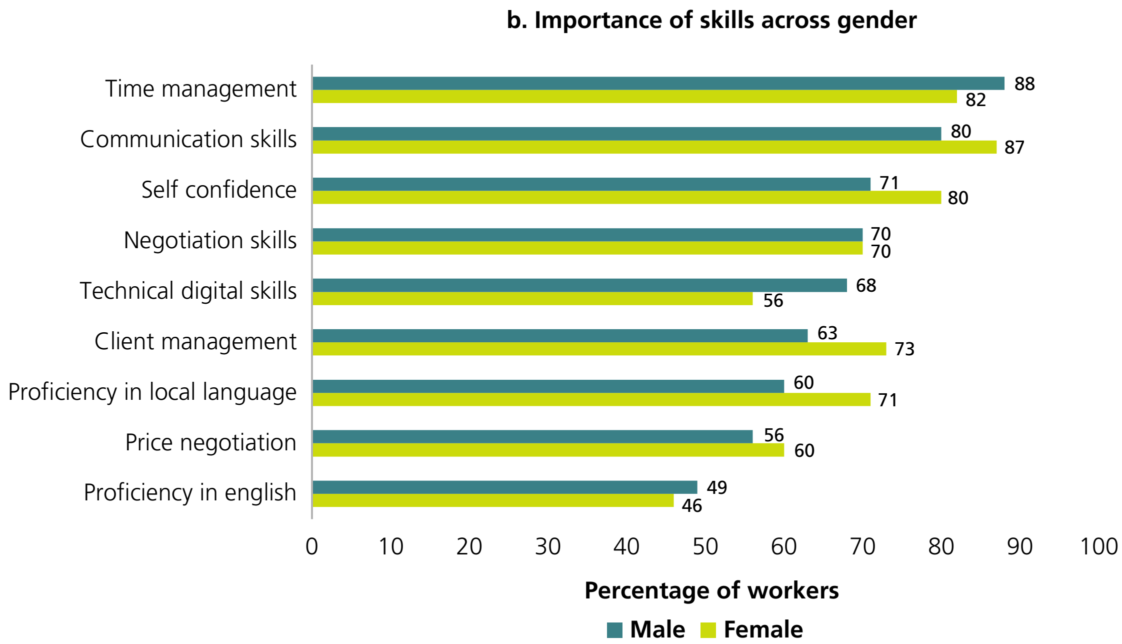
FIGURE 4.15: (Continued)



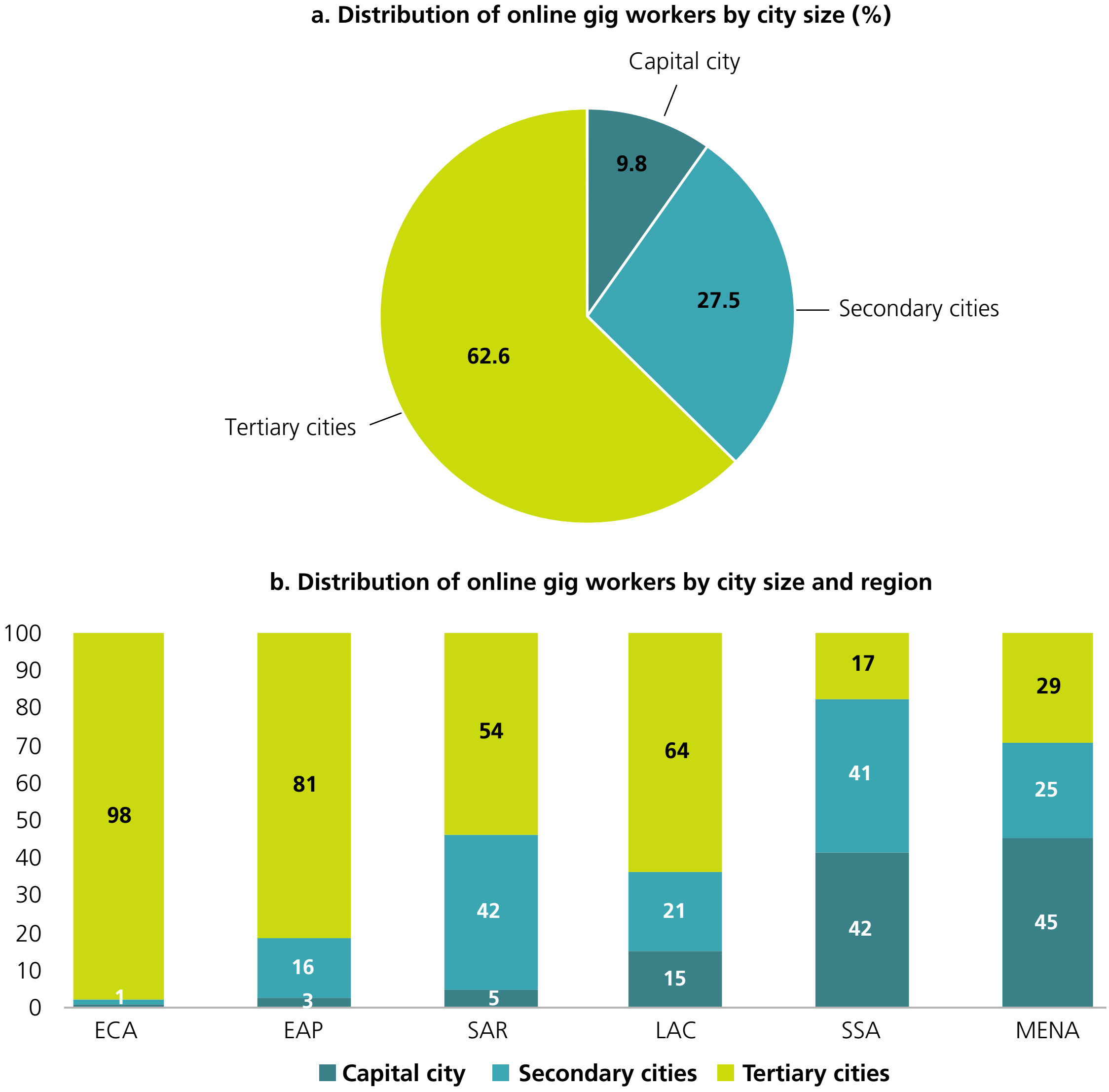
Source: Study team analysis based on Workana survey data.
Note: Values are percentages of respondents; respondents could choose multiple options. The survey results indicate that there are statistically significant gender differences in all of the skills that were identified as very important, except for negotiation skills and the ability to speak and read English, for which there were no significant differences (5 percent level) observed.

4.6 SPATIAL INCLUSION

Online gig work creates work opportunities beyond major cities. The global survey was able to track a respondent's location; the survey automatically recorded geolocation data for each respondent. The team used the location data to classify gig workers into **three types of cities:** (a) capital cities, (b) secondary cities (cities that are not the capital city but among the top 10 largest cities in a given country), and (c) tertiary cities (smaller cities and towns beyond the capital city and the top 10 largest cities in a given country). The data show that more than 6 in 10 gig workers live in tertiary cities and over a quarter live in a secondary city (Figure 4.16, panel a). Patterns may differ at the platform level, but generally a good share of online gig workers come from cities other than the capital. On the India-based Truelancer platform, for instance, more than 60 percent of the online gig workers surveyed live in secondary or tertiary cities and villages; 40 percent live in capital cities.

Nevertheless, there are strong differences between regions. The vast majority of online gig workers in Europe and Central Asia, East Asia and Pacific, and Latin America and the Caribbean are based in tertiary cities (fFigure 4.16, panel b). However, in Sub-Saharan Africa and in the Middle East and North Africa, a much greater share of online gig workers is in capital cities than in the other regions (42 and 45 percent, respectively). There is no major difference between the location of gig workers on global platforms and regional platforms. The spread of gig workers across both major and minor cities within countries shows that online gig work can bring tangible benefits for workers beyond the main economic centers or capital cities.

FIGURE 4.16: Distribution of online gig workers by city size

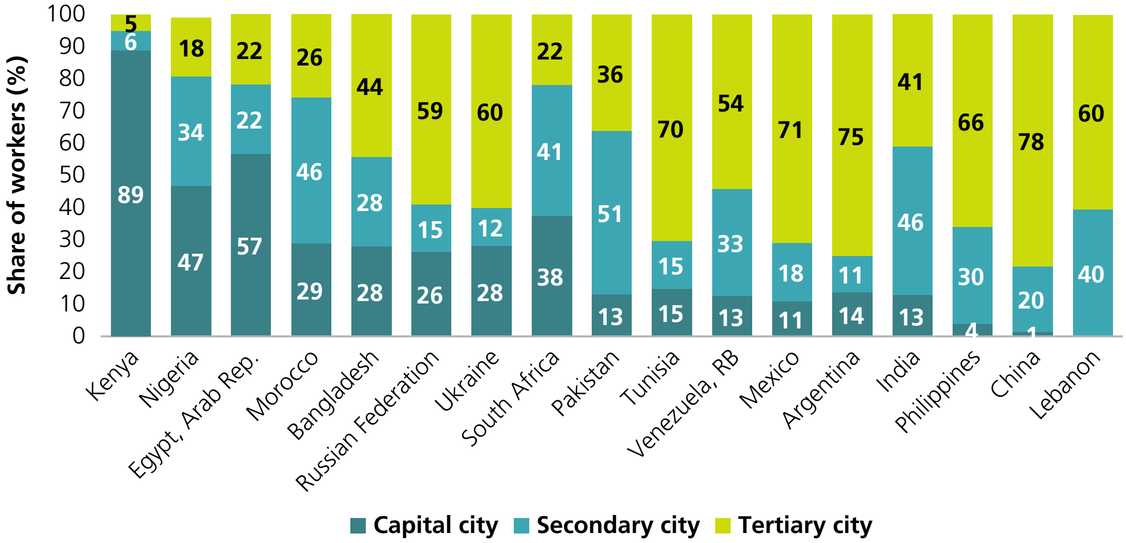


Source: Global RDIT survey conducted by the study team.
Note: Secondary cities in this context refer to the top 10 largest cities in a given country except for the capital. Tertiary refers to the rest of the smaller cities and towns. EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

While remote online work can provide more job options for rural workers, the availability of digital infrastructure and devices is one of the main constraints. The spatial distribution of online gig work is dependent on the level of internet penetration, rural electrification, and the overall level of economic development of the country. With greater availability of internet access, greater levels of rural electrification, and higher income per capita, gig workers tend to be more spread out in secondary and tertiary cities in the country (figures 4.17 and 4.18). A study conducted with US platform workers also found that the least urbanized areas with poor infrastructure and lower levels of education are least likely to participate in online platform work (Braesemann et al. 2022). A digital divide between urban and rural areas still exists in developing countries. The difference in access to the internet between urban and rural areas is marginal in developed countries (89 and 85 percent, respectively), but in developing countries the disparity is much wider (72 and 34 percent, respectively) (ITU 2021). The difference in the enabling environment and access to the Internet may limit opportunities in developing countries that lack the infrastructure to support online gig work.

A study based on data from a major global platform suggests that online gig job projects flow to the capital cities in the Global South to a greater extent than in other regions of the countries, with capitals attracting 15 times as many projects.[107]

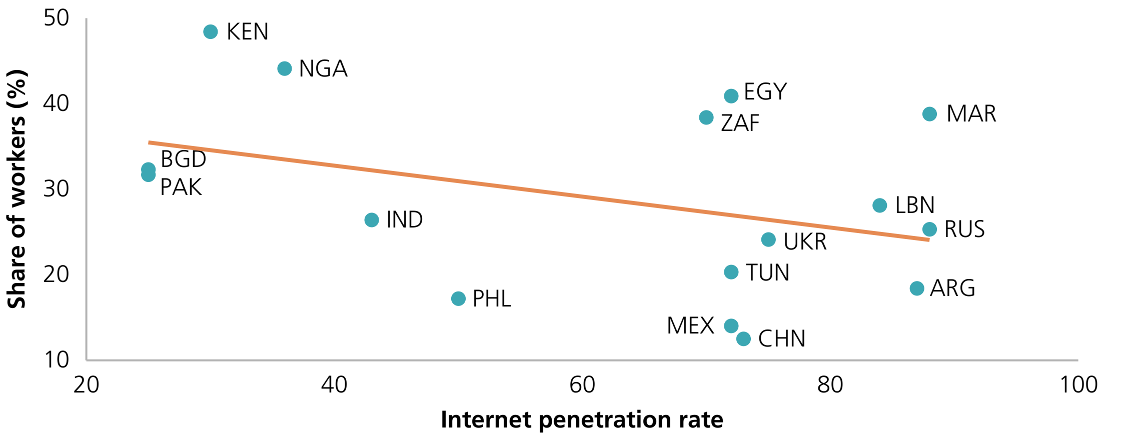
FIGURE 4.17: Spatial distribution of gig workers within countries



Source: Global RDIT survey conducted by the study team.

FIGURE 4.18: Relationship between spatial distribution of gig workers within countries and key infrastructure and economic development factors

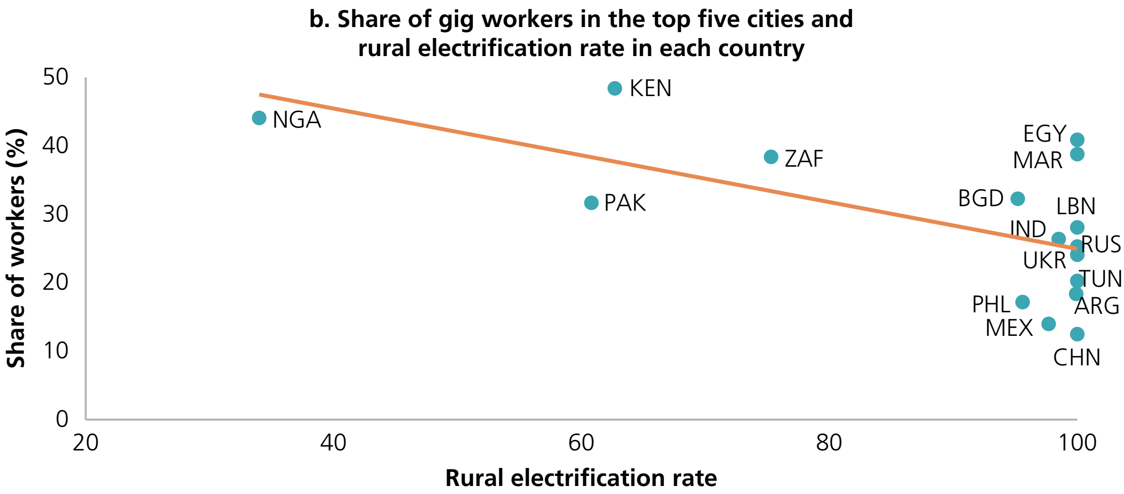
a. Share of gig workers in the top five cities and internet penetration rate in each country

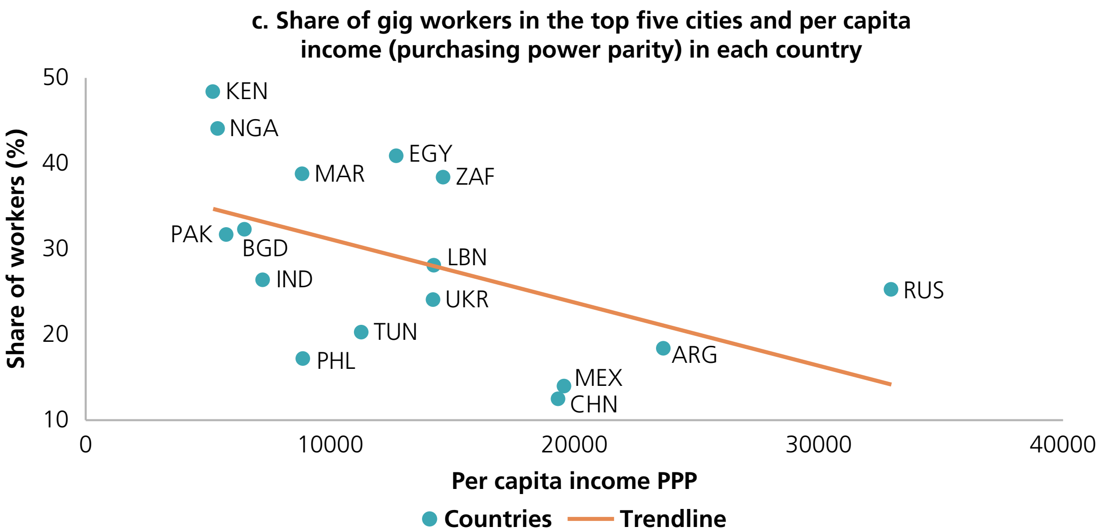


(Continued)

[107] Braesemann, Lehdonvirta, and Kässi (2022) used data from one major global platform and found that gig jobs tend to be clustered in capital cities. Their study used different indicators of concentration and used data from only one platform, while our survey, conducted in 12 languages, reached a larger proportion of people in smaller cities. In addition, the Global South classification used in this paper does not account for several countries, including China, India, and South Africa, which are included in the team's estimates based on the global survey and which carry significant weights in the team's analysis.

FIGURE 4.18: (Continued)





Source: Analysis based on the global RDIT survey conducted by the study team and WDI data.
Note: The analysis is restricted to the percentage of gig workers in the top five cities in each of the countries in the global survey. ARG = Argentina; BGD = Bangladesh; CHN = China; EGY = Arab Republic of Egypt; IND = India; KEN = Kenya; LBN = Lebanon; MAR = Morocco; MEX = Mexico; NGA = Nigeria; PAK = Pakistan; PHL = the Philippines; RUS = Russian Federation; TUN = Tunisia; UKR = Ukraine; ZAF = South Africa.

Gig work could provide some temporary opportunities for a particularly vulnerable group—namely, refugees, who often face difficulties in integrating in the local labor market and for whom location is thus a barrier to traditional work. An International Finance Corporation (IFC) report (IFC 2021) analyzing the experience of women refugees in Jordan and Lebanon emphasizes that while the digital economy may hold promise for refugees, at least as a temporary source of income, there are still barriers to be overcome to integrate refugees into the economy (such as easing legal restrictions on the type of work that refugees can carry out and improving knowledge about the refugee demographic). Box 4.2 presents key initiatives promoting online gig work as an opportunity for refugees and other displaced people.

BOX 4.2: ONLINE GIG WORK AS AN OPPORTUNITY FOR REFUGEES

Online gig work can be a solution to the entry barriers of local traditional labor markets for refugees and displaced people. Several initiatives around the world are tapping this potential, through a combination of training programs directly geared to or open to refugees, among other participants, and access to online gig job opportunities.

Humans in the Loop is a social enterprise founded in 2017 and based in Bulgaria (Humans in the Loop 2020). It is active in Iraq, the Syrian Arab Republic, and Türkiye and trains and employs displaced people to work on data annotation projects for artificial intelligence start-ups. Humans in the Loop takes a two-pronged approach to fostering access to online gig work opportunities for refugees by providing low-entry-barrier jobs, such as easy-to-complete data annotation online tasks, and by offering training opportunitiesvthat focus on digital skills, English language skills, and career guidance. The organization currently employs over 250 refugees, migrants, internally displaced people, and vulnerable locals; its workforce has grown from 167 in 2019. In addition to providing employment opportunities, Humans in the Loop had trained 137 people as of June 2022. The organization pays particular attention to the challenges faced by women and ensures that at least 50 percent of participants in the training and employment programs are women. In 2020, women made up 54.6 percent of its workforce (Humans in the Loop 2020).

Gaza Sky Geeks[a] is an initiative of Mercy Corps founded in 2011 in Gaza and currently operating in Gaza, the West Bank, and East Jerusalem. Gaza Sky Geeks supports freelancers, founders, and coders working online and in the tech field. For online freelancers, Gaza Sky Geeks offers two types of programs: the Freelance Academy,[b] a three-month mentorship program, and the Code Academy, courses to improve programming skills. The Freelance Academy helps aspiring online freelancers understand the essentials of online freelancing platforms, how to build a competitive profile, and how to apply for jobs, communicate with clients, and negotiate. The Freelance Academy partners with Upwork and supports freelancers in setting up their accounts. The Freelance Academy has trained 2,225 online freelancers, 61 percent of whom were women. Through the Coding Academy, Gaza Sky Geeks provides two courses on web development: a foundational course for those without experience and an advanced course for students with some experience. More than 130 students have graduated from the Coding Academy. Gaza Sky Geeks has also supported refugees in using online gig opportunities. For instance, in 2021, 35 refugees and internally displaced people in Iraq completed the Freelance Academy program, delivered remotely with support from the Mercy Corps Iraq team.[c] Success stories of Gaza Sky Geeks also show their impact in the Palestinian refugee camp of Al Faraa, where Gaza Sky Geeks organized a four-day boot camp to boost online freelancing skills.[d]

(Continued)

BOX 4.2: (Continued)

The **Dadaab Collective** provides an interesting example of leveraging training and the agency approach to online gig work to support refugees and displaced people. The Norwegian Refugee Council and the International Trade Centre, with funding from the Dutch Ministry of Foreign Affairs, have been training refugees in the Dadaab refugee camp in Kenya for online freelancing as part of the Refugee Employment and Skills Initiative (RESI).[e] The initiative provides courses for young refugees to develop skills that are sought-after on online gig work platforms, including graphic design, digital marketing, data entry, translation, and digital journalism and photography. The technical courses are complemented by trainings in soft skills and business skills to empower refugees to pursue online freelancing. The key to integrating the students into the market for online gig jobs, however, is not solely the training, but a cooperative of freelancers to support and motivate them to work. The cooperative, the Dadaab Collective, brings together the graduates of the training program and is independent and run solely by youth. The organization facilitates the sourcing of jobs among its members and is registered as an agency for Upwork.[f]

By simplifying the process of searching for jobs, the agency model may be particularly useful for ensuring that less experienced graduates can learn and be motivated by graduates of the program who have gained experience in online freelancing, increasing their chances of success in the early stages of freelancing after having finished their training.

a. See https://gazaskygeeks.com.
b. See https://gazaskygeeks.com/freelance/.
c. See "Letter from the Director," January 5, 2022, https://www.linkedin.com/pulse/.letter-from-director-gaza-sky-geeks/?trk=organization-update-content_share-article.
d. "Rapid Success in Just Two Years of Freelancing!, May 12, 2022, https://www.linkedin.com/pulse/rapid-success-just-two-years-freelancing-gaza-sky-geeks.
e. Paul Ireland, "Meet the Refugees Joining the Digital Economy," NRC, March 31, 2021, https://www.nrc.no/perspectives/2021/meet-the-refugees-joining-the-digital-economy/.
f. Dadaa Collective Freelancing Agency, Upwork, https://www.upwork.com/ag/dadaabcollectiveagency/.

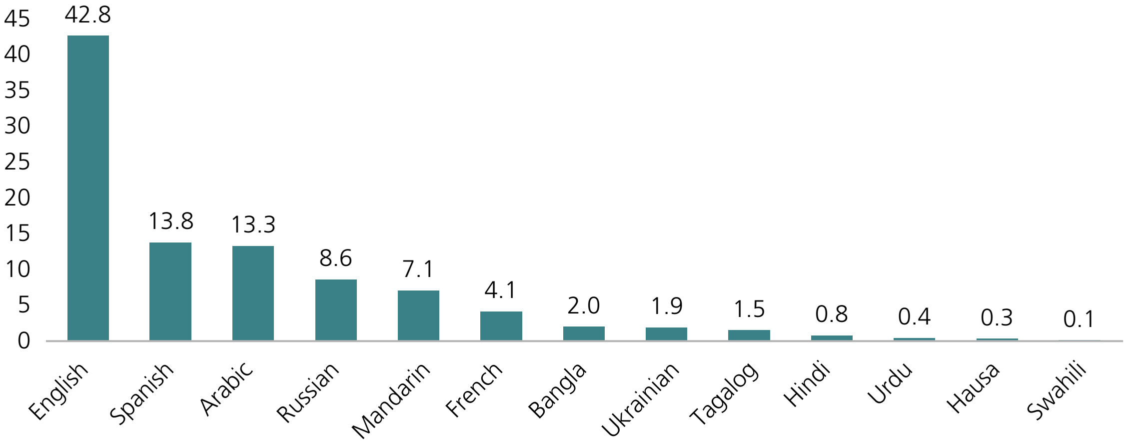
4.7 LANGUAGE

Language can be a significant barrier to accessing online gig work opportunities. Some 33 percent of online gig workers confirm that one of the main challenges they face on global platforms is English language skills. The global supply of online gig work is dominated by workers in English-speaking countries. Three countries in particular—India, Bangladesh, and Pakistan—account for over 50 percent of the supply of online gig work on the basis of data collected by the Online Labour Index (OLI),[108] signaling that workers from non-English-speaking countries are likely to face language barriers to enter the online gig work market.

[108] The OLI collects data from the five largest English-language online gig work platforms and six non-English-language platforms (three in Russian and three in Spanish), http://onlinelabourobservatory.org/oli-supply/.

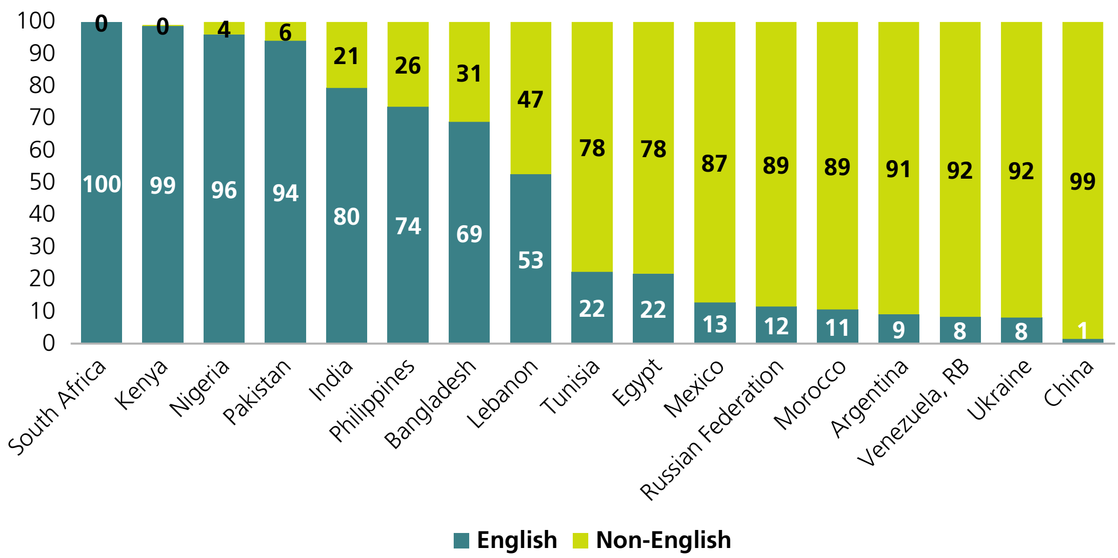
Surveys conducted in English tend to not only exclude non-English-speaking populations but also might underestimate the overall size of the online gig workforce. The study team's global survey was translated into 12 languages to ensure a wider reach. In addition, the team was keen to reach gig workers who may be working on regional/local platforms. A substantial number of responses (57 percent) were in languages other than English (figure 4.19). For countries where English is not the official language or a widely used language, English-only surveys could neglect a significant proportion of the online gig work population (China, Ukraine, República Bolivariana de Venezuela; Figure 4.20).

FIGURE 4.19: Languages of responses received to the global survey



Source: Global RDIT survey conducted by the study team.
Note: Values are percentages.

FIGURE 4.20: Distribution of languages of responses by online gig workers by country



Source: Global RDIT survey conducted by the study team.
Note: Values are percentages.

Local platforms could help bring non-English-speaking people to digital platforms. Data from the global survey on differences between workers on global versus regional/local platforms provide supporting evidence. Two-thirds of online gig workers in the global survey who work on regional/local platforms completed the survey in a language other than English, while 50 percent of workers on global platforms responded in English. Platforms in Latin America and the Caribbean have especially catered to local-language speakers. On Workana, English is among the lowest-ranked skills needed to succeed in online gig work; in comparison, Spanish is considered more important by online gig workers on Workana (see figure 4.20). Similarly, on SoyFreelancer, survey respondents see English language skills as less important than other skills (such as communication skills, time management, and Spanish language skills). The lesser importance of English language skills in the region may be a sign of the growing maturity of the regional online gig work market and the diversity of work opportunities in the local language. The availability of work opportunities in the local language on Workana could contribute to a greater inclusion of workers in the (online) labor market.

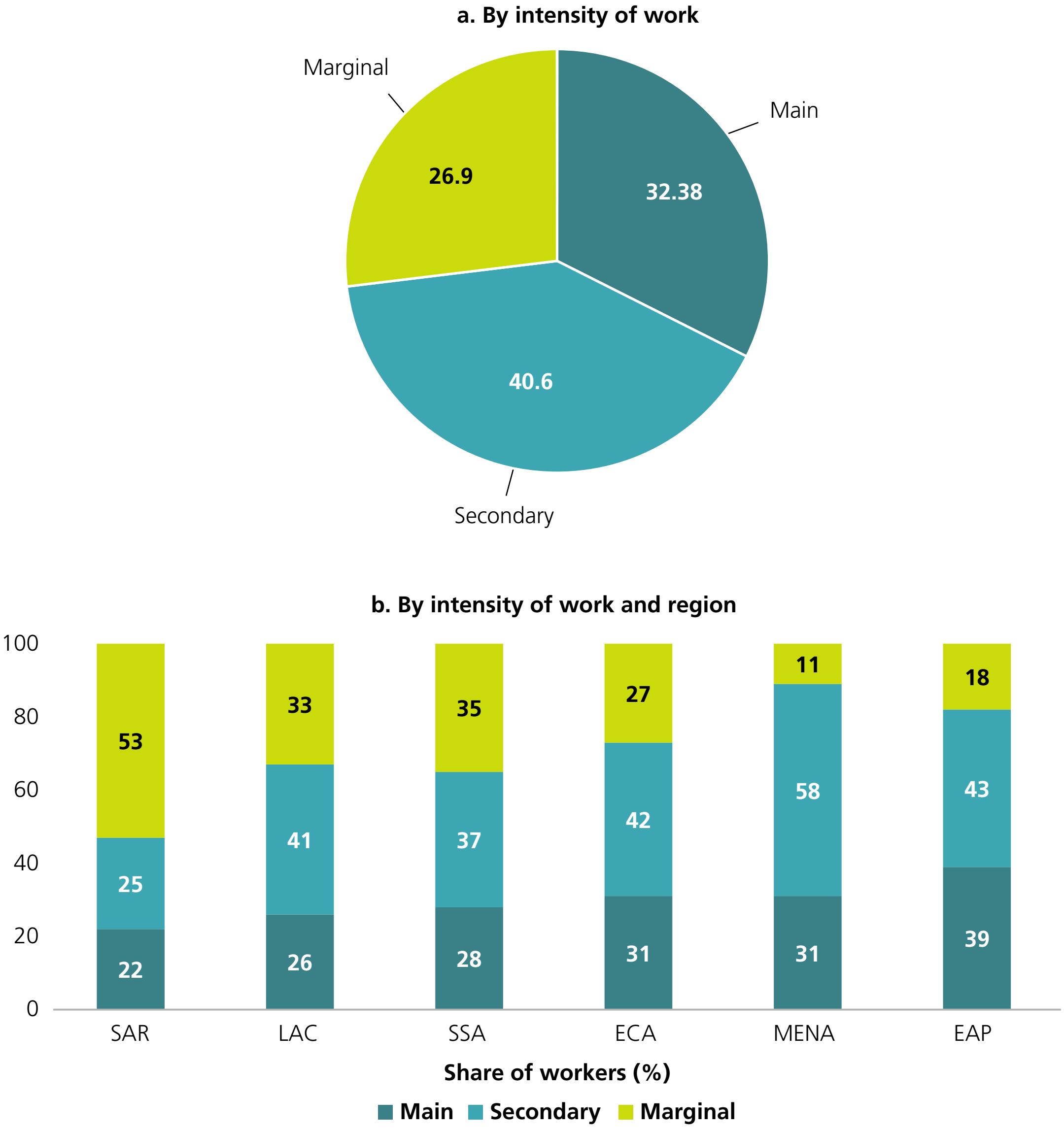
4.8 EARNINGS AND INCOME

Online gig work is an important means of earning supplemental income. Gig work is a secondary activity for 4 in 10 workers (figure 4.21, panel a), which means they spend 10 to 19 hours and earn 25 to 50 percent of their income through gig work; workers with uneven work patterns are also considered in this group (people spending little time but earning a large share of their income from gig work, or spending substantial time but earning a small share of their income from online gig work; see table 4.2). Around one in three online gig workers is engaged in online work as their main activity, earning a majority of their income from or spending the majority of their working time (more than 20 hours a week) on online gig work, and more than one-quarter do online work only sporadically (that is, as a marginal activity, earning less than 25 percent of their income from and spending less than 10 hours a week on online gig work). A greater share of workers on regional/local platforms carry out online gig work only as a marginal activity compared to workers on global platforms (46 versus 24 percent), while greater shares of workers on global platforms conduct online gig work as a main or secondary activity.

Intensity of gig work differs regionally. In East Asia and the Pacific, a greater share of online gig workers engage in online work as their main occupation (39 percent), while in the South Asia region most online gig workers do such work only marginally (53 percent; figure 4.21, panel b). A comparable study from Europe estimated the share of main gig workers at 11 percent based on data from 2018 and found that most gig workers were secondary gig workers.[109]

[109] Caveat: this figure also includes workers who perform location-based gig work, based on data collected through a survey conducted in 16 European countries (Urzì Brancati, Pesole, and Férnandéz-Macías 2020, 16).

FIGURE 4.21: Share (%) of online gig workers by intensity of work based on the global RDIT survey



Source: Global RDIT survey conducted by the study team.
Note: EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and Caribbean; MENA = Middle East and North Africa; SAR = South Asia region; SSA = Sub-Saharan Africa.

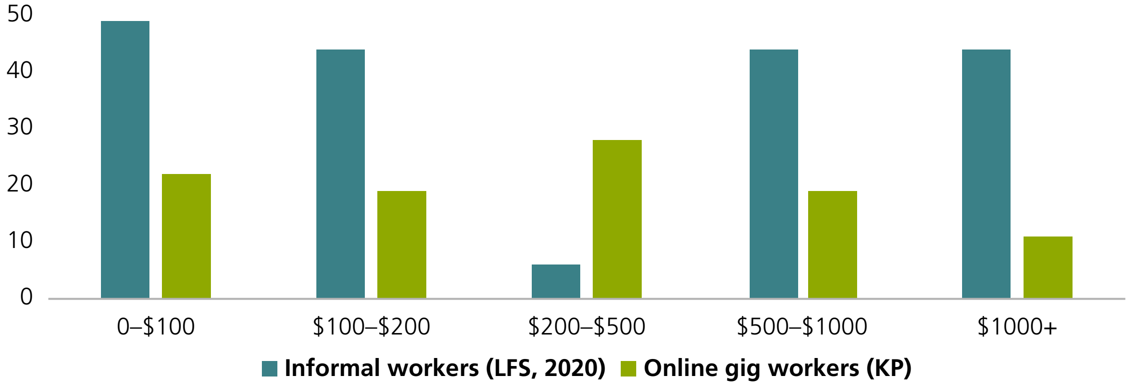
Evidence at the platform level also confirms that online gig work is used primarily to earn supplemental income. On SoyFreelancer, a Latin American gig platform, two out of three online gig workers report having another job. Half of them report working for an employer, and over one-quarter report running their own business. On Workana, for most of the respondents, earnings from gig work account for less than 25 percent of their household and individual income, with no significant variations across gender.

Still, for almost a quarter of workers, online gig work is the main source of their income. This is consistent with other estimates of 10 percent[110] to 30 percent (ILO 2021b). In Bangladesh, respondents to the study survey earned a significant share of their income from freelancing platforms.

[110] This figure does not distinguish between location and web-based online gig work (Goldfarb 2019).

On average, online gig workers report earning Tk 82,943 per month (equivalent to US$967) from freelancing platforms,[111] while the average monthly household income is estimated at Tk 16,000 (equivalent to approximately US$150).[112] In Pakistan, the study survey finds that monthly earnings of online gig workers are substantially higher than those of informal workers. Over 90 percent of the informal workers earn less than US$200 per month, while the same parameter is only 41 percent for online gig workers, as shown in figure 4.22.

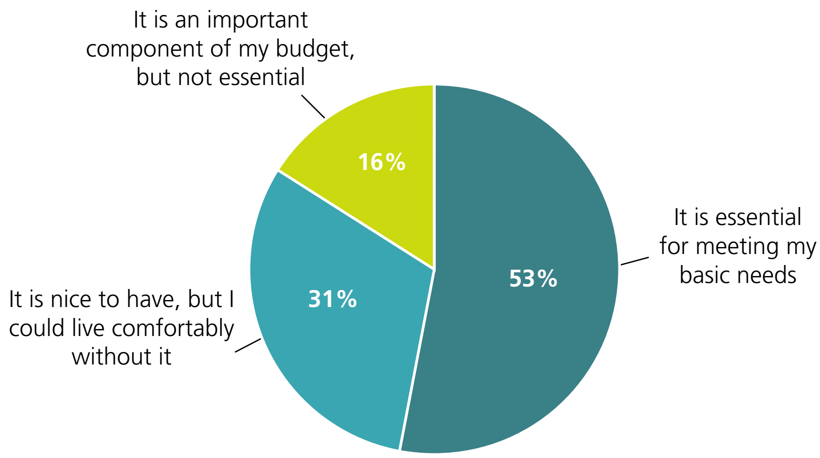
FIGURE 4.22: Monthly incomes of online gig workers compared to informal workers in the Khyber Pakhtunkhwa province, Pakistan



Sources: Survey conducted by study team in Khyber Pakhtunkhwa province, Pakistan, and Pakistan labor force survey (LFS), 2020.
Note: The figure compares the wages of informal workers in the Khyber Pakhtunkhwa province of Pakistan to the information on income provided by online gig workers in the Khyber Pakhtunkhwa province who completed the gig worker survey conducted by the study team. We conducted a pooled regression analysis by combining data from the Khyber Pakhtunwa survey and the LFS for the KP region. We controlled for age, education, and marital status and found that online gig workers are more likely to be in higher income brackets than similar workers in the informal sector. USD = US dollars.

In Africa, household survey data from nine African countries from 2017 and 2018 show that the income earned through gig economy activities is essential for the majority of gig workers (figure 4.23).

FIGURE 4.23: Importance of income earned through gig economy activities (% of gig economy participants)



Source: Chen, forthcoming.

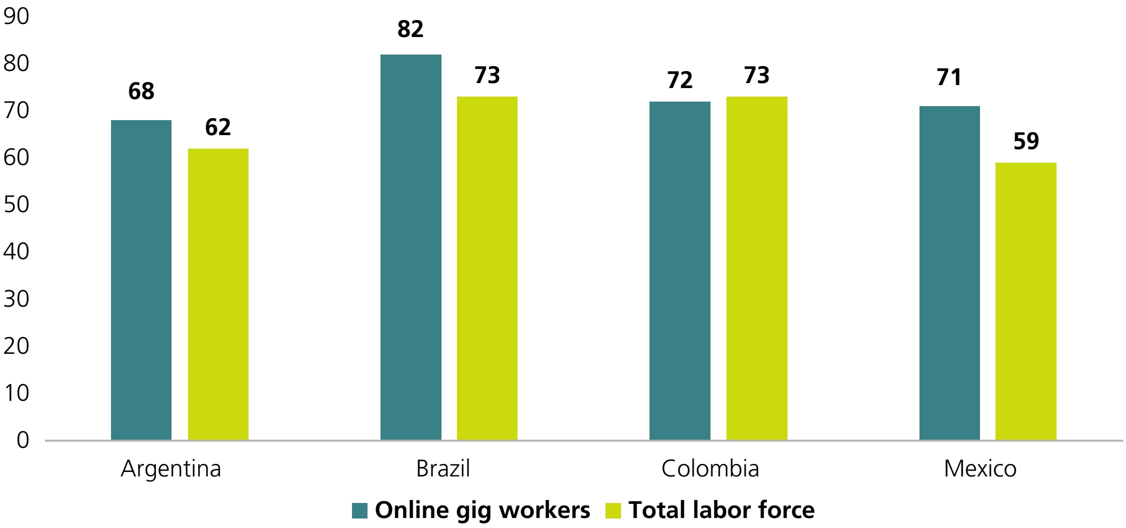
[111] The average earnings of online gig workers are based on self-reported information collected through the survey, and biases can exist.

[112] The figure for the average household income is based on the latest information available from the Bangladesh Bureau of Statistics, through the Household Income and Expenditure Survey from 2016, http://data.bbs.gov.bd/index.php/catalog/182.

With targeted initiatives, online gig work can help bring unemployed people back into the labor market. The eRezeki program of Malaysia is an excellent example of a country that has intentionally used online gig work to increase access to jobs. The program was set up by MDEC to foster the inclusion of underserved citizens, especially low-income citizens, in the labor market. Between 2016 and 2020, on average one in three workers on eRezeki was unemployed upon registering on the platform. In 2019 and 2020, eRezeki took a more targeted approach to engaging users, which resulted in a much larger share of unemployed people joining the platform (in 2019, three in four workers who registered on the platform were unemployed). (More details are given in chapter 7.)

In terms of earnings, the gender pay gap among online gig workers is lower than in the general labor market. Data for online gig workers from Argentina using Workana show that, on average, a female online gig worker's wages are equivalent to 68 percent of her male counterpart's. In contrast, that figure is only 62 percent for the general labor force (figure 4.24). The same is true for online gig workers from Brazil and Mexico using Workana, though the magnitudes differ. Nevertheless, there is still a considerable wage gap between men and women, even in the online gig economy.

FIGURE 4.24: Women's wages as a percentage of men's wages for online gig workers using Workana compared to national LFSs

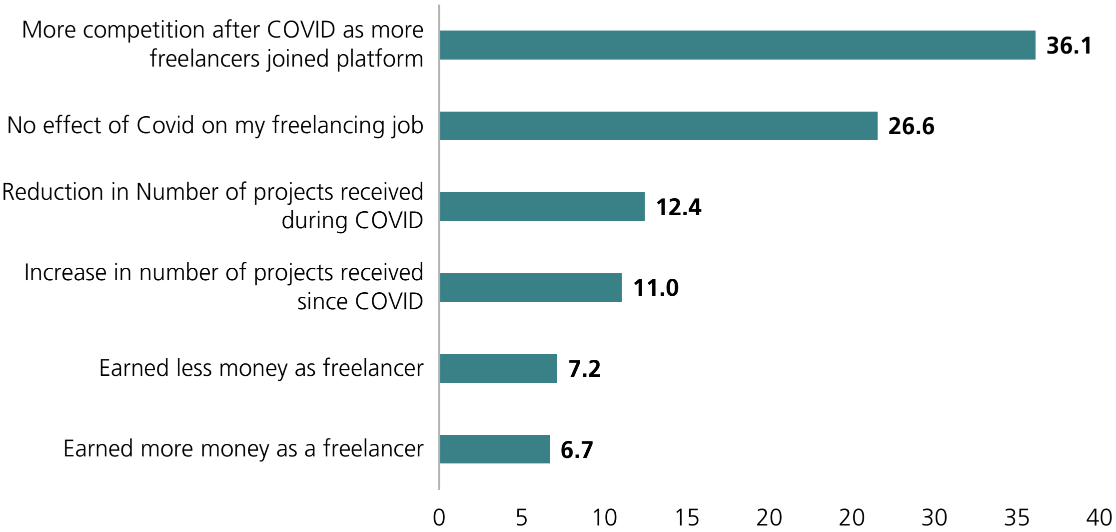


Source: Study team analysis of Workana survey and the latest available national labor surveys in the selected countries, conducted with an Inter-American Development Bank team.
Note: The earnings of online workers in the Workana survey are indirectly inferred by asking them, "What is the minimum monthly salary that a full-time salaried job would have to offer for you to stop doing freelance work on Workana (in USD)?" LFS = labor force survey; USD = US dollar.

Gig work is becoming increasingly competitive as the supply of gig workers increases. The COVID-19 pandemic exacerbated some of the existing trends in online platform work and increased competition. The notion of remote online work has become more widespread because of the pandemic and policies to reduce social contacts (Fairwork 2021), but issues of oversupply of labor are increasing, as evidenced by the platform country surveys conducted by the team and other studies (Stephany et al. 2020). In Bangladesh, respondents to the survey confirm that they were affected by COVID-19, primarily by the increase in competition. At the platform level on Workana in Latin America, there is a similar perspective (see figure 4.25). More than one-third of the respondents find that COVID-19 increased competition among freelancers.

Workers in developing countries would like to do more gig work but find it hard to access enough well-paying tasks. Skills and reputation are the key assets of online gig workers, but reputation is not always easy to build. The anonymous and sporadic nature of gigs means that a prior reputation is critical for access to better-paid or longer-term work opportunities (Wood et al. 2019). This pressure of building a reputation or rating leads to significant stress for gig workers, who often work on short notice and at odd hours or on unfair terms simply to avoid low ratings (Wood and Lehdonvirta 2021). This risk is amplified by the limited transparency in platform policies and processes behind the rating systems (Sutherland et al. 2020; Wood and Lehdonvirta 2021).

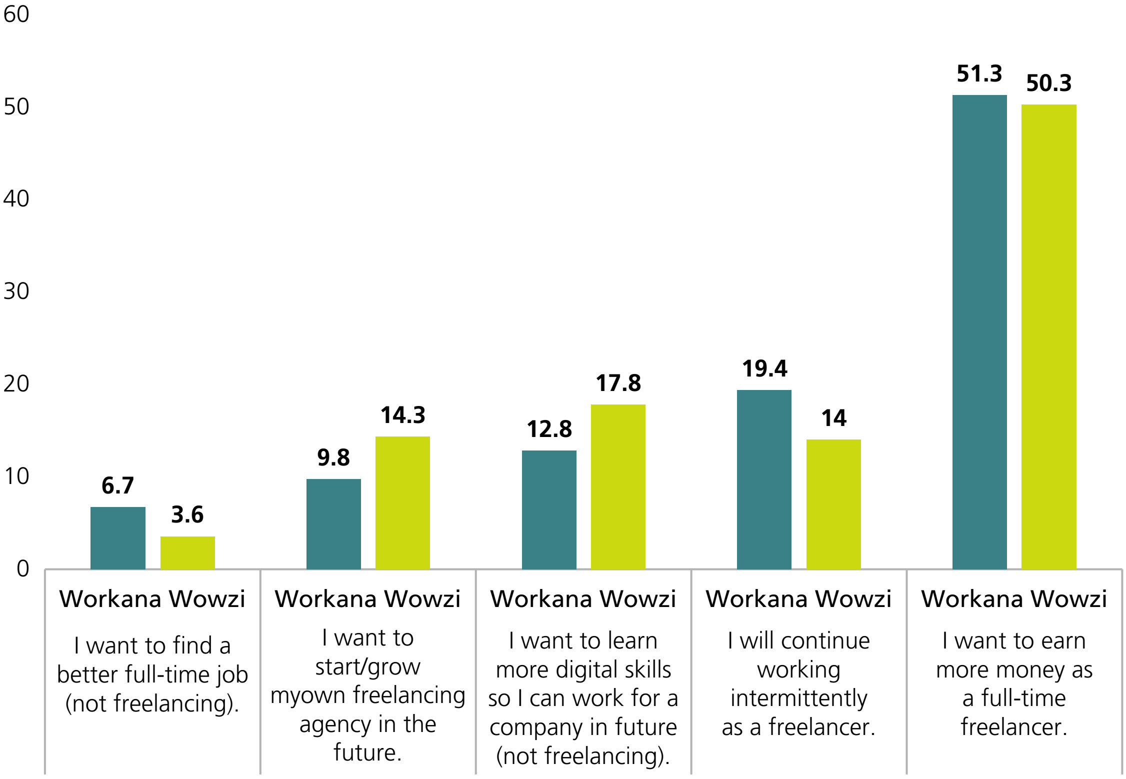
FIGURE 4.25: Impact of the COVID-19 pandemic on online gig work, according to workers on Workana



Source: Study team analysis based on Workana survey data.
Note: Values are percentages.

In terms of career prospects, freelancing is a career path for some online gig workers, though not most. More than one in three online gig workers in Pakistan strive to be entrepreneurs, wanting to start their own agency or grow their existing online freelancing agency. Another 35 percent would like to earn more from their online gig work. Interviews with women online freelancers in Pakistan also show how online freelancing can become not just an activity to earn additional income, but also a career in its own right, allowing women to become entrepreneurs (see box 4.1). Data at the platform level shows that preferences may vary, however. Over 50 percent of respondents in the surveys conducted on Workana and Wowzi confirm that they want to increase their earnings from online gig work, but only about 1 in 10 online gig workers on either platform wants to start or grow a freelancing agency (figure 4.26). On SoyFreelancer, the vast majority wish to grow and earn more as a freelancer (64 percent). Another 20 percent of respondents would like to go beyond the platform work and start their own business.

FIGURE 4.26: Career aspirations among survey respondents on Workana and Wowzi



Source: Study team analysis based on Workana and Wowzi survey data.

4.9 CONCLUSION

Our study finds that online gig work is dominated by youth, giving them the chance to earn money and learn new skills and the flexibility to earn while studying or doing another job. While men make up most of the online gig workers, women are participating in the online gig economy to a greater extent than in the general labor market in similar sectors and occupations. Although still dominated by people with higher education levels, the online gig economy can provide opportunities to a variety of skill levels, particularly of those with high school education. More than 6 in 10 online gig workers are based in tertiary cities—in other words, smaller cities and towns other than the capital or the top 10 largest cities in their country, which points to the role that online gig work could play in addressing regional inequalities in access to jobs. Regional/local platforms offer more opportunities for non-English-speaking workers, thus enabling inclusion in countries where English is not the main language. Overall, gig work remains a secondary means of earning income for most, but not all, gig workers.

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