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ABSTRACT

Based on representative samples of gig workers from Chile (drivers and riders working through applications like Uber and Rappi), this paper explores the subjective and objective impact of two Chilean laws regarding the gig economy. The demographic and employment characteristics of these workers, including job satisfaction and motivation, are also analyzed. Overall, laws have a muted to negative effect on workers. For the first law (which formalizes the status of gig workers as workers), those who report a negative impact associate it with less flexibility regarding working hours, in addition to the now compulsory income taxes. For the second law (which increases the requirements to work as driver), more than half report that they will stop working. Partial compliance with the law also stands out, which is particularly clear in the low and stable rate of income reporting to the State by workers.

Keywords: gig workers, gig economy, job satisfaction, social policy

JEL: J28, J46, J88, K31

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1) Introduction

In recent decades, the world of work has undergone a profound transformation driven by automation and digitalization. One prominent example is the so-called "gig economy", with digital labor platforms standing out for their visibility and expansion. These platforms are digital infrastructures that facilitate the coordination of supply and demand for numerous services through mobile applications. Delivery applications (e.g., PedidosYa, Rappi, UberEats) and ride-hailing applications (e.g., Uber, DiDi, Cabify) are used daily by millions worldwide.

In Chile, as in many other countries, the digital platform economy has gradually consolidated. Since 2020, the National Institute of Statistics of Chile (INE) has included two questions in its National Employment Survey (ENE) to determine whether a primary and/or secondary work activity is conducted "through a mobile application or web platform." Figure 1 shows the responses to these questions, focusing on individuals engaged in delivery services (referred to as *riders*, e.g., Rappi) and driving services (referred to as *drivers*, e.g., Uber), which are the focus of this study. As expected, there was high demand for delivery services around the Covid-19 pandemic, which later stabilized. Ride-hailing services have seen a sustained increase in the period. Latest data suggests around 70,000 people engaged in these gig activities.

Figure 1 – Number of workers in Chile engaged in gig-related delivery and driving activities (in thousands)

Source: Own elaboration based on data from the National Employment Survey of the Chilean National Institute of Statistics.

This new labor paradigm, driven by technological and organizational innovations (or what some authors refer to as “regulatory arbitrage”; e.g., Pollman 2019), poses significant challenges in terms of legal and social protections for workers. It has become evident in many countries that traditional labor market regulations are not applicable to this new economic organization model. Chile has led the process of regulatory updates in the region, being the first to legislate these activities. To date, two laws have been enacted on this matter. The first, Law No. 21.431 ("Digital Platforms Law," in effect from September 2022), regulates the contract between workers and platforms, granting a series of rights to the former and obligations to the latter. The second, Law No. 21.553 ("Uber Law," not yet in effect), specifically regulates drivers' activities, setting standards for driver licenses and vehicle types, in effect equaling conditions with regulated passenger transport, creating fairer competition between traditional and non-traditional private transport models.

In this context, it is of interest to understand the practices and work experience of these workers, as well as evaluating the impact these laws have or will have on them. There are some studies in Chile approaching gig workers’ experiences but none focusing on the impact of law. From a

quantitative perspective, Asenjo and Coddou (2021) stand out with their study based on a survey of 309 riders in Santiago, conducted under the framework of an International Labour Organization (ILO) study in 11 countries (ILO, 2021). DataLab (2020) surveyed 353 Uber drivers and 100 UberEats riders in Santiago. From a qualitative perspective, three studies conducted by the Fairwork Foundation (in 2021, 2022, and 2024) are interesting for Chile, evaluating the labor conditions associated with platform-based work in Santiago. Survey sizes ranged from 35 to 100 respondents. Finally, there are some exploratory studies, also focused on Santiago, with samples smaller than 15 respondents each (FLACSO 2024; Maza and Aguilar, 2022; Morris, 2021).

A common denominator in this literature echoes the two aspects traditionally associated with informal work. On one hand, the generalized precariousness of workers in these jobs compared to formal workers. For instance, Asenjo and Coddou (2021) document the lack of insurance for risks inherent in delivery work (30% of respondents reported having suffered an accident while delivering), as well as the virtual absence of a support network from the platforms. Similarly, in the three Fairwork reports mentioned, only one company out of the ten evaluated (Cabify, in 2024) scored higher than two points (out of a maximum of 10), reflecting insufficient working conditions in the sector.[1]

On the other hand, the reviewed studies highlight flexible working hours as a significant motivating factor for participating in this sector, along with the opportunity to earn

[1]The situation is not unique to Chile. In none of the 39 countries evaluated by Fairwork does a single company achieve a full score of 10 points, although scores tend to be higher in wealthier countries. This is partly due to the demanding nature of the criteria, which would likely result in low ratings for many formal companies as well (e.g., regarding compliance with living wage standards). See https://fair.work/es/fw/ratings/.

supplementary income based on availability and need.[2] Both positive and negative dimensions also emerge in similar studies conducted internationally (see ILO 2021 for a recent summary).

This study complements the existing literature in two ways. Unlike previous studies, we provide a representative picture of gig workers. Additionally, we evaluate workers' perceptions on the effects of recent regulatory changes as well as change in workers' practices.

These goals are achieved using two data sources. First, we use official statistics from the ENE, already introduced above. Chile is one of the first countries to start measuring this type of gig work, with data available since 2020. Second, we conducted two surveys to gig workers, in October-November 2022 (hereafter, **Gig Survey 2022**) and in May 2024 (hereafter, **Gig Survey 2024**). Unlike the ENE, which measures traditional labor and socio-demographic characteristics, the two surveys we conducted focused on specific aspects of gig work, as well as the impact of both gig laws. The first survey examines job satisfaction in detail, considering overall satisfaction as well as sub-dimensions of work. The second survey delves deeper into the motivations for participating in gig work. Both surveys assess the effect of the law already in effect (since September 2022), while the second survey also examines expectations regarding the law yet to come into force. The first survey focused exclusively on riders (PedidosYa, Rappi, UberEats), while the second also included drivers (Uber, InDrive, DiDi). Both surveys were taken in Valdivia, a regional capital in southern Chile.

Surveys were designed to achieve representation of the target population. Even though sampling was non-probabilistic, respondents turned out to be statistically similar to gig workers in ENE. The surveys received a total of 103 responses in 2022 and 66 responses in 2024 (44 riders and 22 drivers).

[2]It is also true that a segment of these workers, particularly those using delivery applications, are migrants participating in this informal economy because they lack official immigration documents to engage in formal market activities (e.g., Asenjo and Coddou, 2021).

Many interesting findings emerge from the analysis. There are clear differences between riders and drivers compared to other workers (with the former being predominantly male, a high presence of Venezuelans, and individuals with higher education levels) and differences between riders and drivers themselves (the former are generally younger and have a greater proportion of foreigners). Riders cite monetary reasons as the most important factor for choosing this type of work, while drivers emphasize the complementary and temporary nature of the activity, often due to a lack of better job opportunities. Both groups value the flexibility their work provides, with most working the number of hours they desire.

Job satisfaction for both groups is high, although it has declined recently. The availability of leisure time and the level of payment received are the most significant components of satisfaction, strongly associated with the ability to work the desired hours.

Finally, perceptions of the impact of both laws are marked by high indifference, with a significant portion indicating negative effects. Regarding the first law (which formalizes the worker status of riders and drivers), those reporting negative impacts associate them with reduced flexibility in working hours and shifts, as well as less income due to taxes. For the second law (which regulates drivers' activities), more than half report that they will stop working, likely due to the increased costs of obtaining a professional license and meeting vehicle compliance requirements. Partial compliance with the law is also notable, particularly in the low rate of income reporting to the state (pay slips with tax deductions). Despite the mandatory income declaration introduced by the law, no statistically significant increase has been observed.

The document continues as follows: Section 2 describes the data. Section 3 presents the socio-demographic and employment characterization of workers. Section 4 explores their motivations

for participating in gig activities. Section 5 examines workers' job satisfaction. Section 6 evaluates the effects and expectations of the two laws in question. Section 7 concludes.

2) Data

2.1) National Employment Survey (ENE)

In January 2020 Chile started measuring workers employed through applications and web platforms. Two questions in the official employment survey asked whether such an activity was performed in the previous week and if so, to name the platform used. These questions were introduced both for the primary as well as the secondary activity. The name of the platform used (which has no empty observations conditional on responding yes to the first question) allows us to identify both drivers and riders - the focus of this paper, leaving out other individuals who work through platforms such as Instagram, Facebook, etc. Therefore, from the ENE we obtain a monthly sample of drivers and riders for the whole country since 2020, including their usual employment and demographic characteristics.

2.2) Surveys in Valdivia

To evaluate the job satisfaction and motivations of gig workers, as well as the impact of legislation on them, we conducted two surveys in the city of Valdivia (in 2022 and 2024). The timing of surveys was related to the introduction of both laws (see later). We used the "time-location" sampling method (Marpsat and Razafindratsima, 2010). This approach involves mapping the locations and times where the target workers congregate and collecting data from a selection of these. For riders (in the 2022 and 2024 surveys), a list of all restaurants offering food delivery via apps (PedidosYa, Rappi, and UberEats) was obtained through web scraping, including their operating hours. This was cross-referenced with location data from Google Maps,

enabling the georeferencing of all pickup points used by workers. The areas were then categorized based on the number of restaurants and their geographical coverage, defining scales suitable for being covered on foot within a limited time. Since not all restaurants generate the same intensity of orders (resulting in fewer workers per hour), more teams were sent to busier areas. Data collection lasted four weeks between October and November 2022 and two weeks in May 2024.

Drivers (included only in the 2024 survey) were contacted through the same ride-hailing apps (Uber, InDrive, DiDi) used to transport survey teams to and from assigned locations. As with riders, drivers were given a QR code linked to the survey. A total of 103 rider responses were collected in 2022, while in 2024, 44 riders and 22 drivers participated.

Table A1 in appendix offers a comparison of gig workers in ENE with the two surveys collected in Valdivia, for a set of demographic and employment variables. The statistical similarity between the results collected in Valdivia and those available at the national level are remarkable.[3] If the latter is a good representation of the population of drivers and riders in the country, also are our surveys.

3) Characterization of riders and drivers

3.1) Demographic characteristics

Table 1 presents demographic characteristics from the two gig surveys in Valdivia, as well as for workers in urban areas and in Valdivia, taken from ENE, for matching reference periods. The point of the table is to compare gig workers between themselves and with the general population.

[3] The largest statistical difference is in the level of education of drivers and the nationality of riders. The first one reflects the context of Valdivia as a university city and therefore with a higher level of education than the national average. The second captures the relatively low recent migration in Valdivia with respect to the rest of the country.

The comparison of gig workers between ENE and our surveys is presented in Table A1 in appendix.

Table 1 – Demographic characteristics of several types of workers for selected surveys (values represent percentages within each subgroup relative to the respective variable)

		Gig survey, Oct-Nov 2022 (Valdivia)	Gig survey, May 2024 (Valdivia)		National Employment Survey, Oct-Dec 2022		National Employment Survey, Apr-Jun 2024	
Variable	Subgroup	Riders	Riders	Drivers	Urban Workers†	Valdivia Workers†	Urban Workers†	Valdivia Workers†
Gender	Male	88.3	90.9	90.9	48.9	47.5***	48.9	48.4***
	Female	10.7	4.5	9.1	51.1	52.5***	51.1	51.6***
	Other/Unreported	1.0	4.5	0.0	0.0	0.0***	0.0	0.0***
Age	18–25 years	38.8	35.6	8.3***	33.8	31.3***	33.1	33.6***
	26–35 years	40.8	37.8	20.8***	17.0	16.3***	16.8	15.2***
	36–45 years	15.5	8.9	37.5***	14.4	11.5***	14.7	15.6***
	46–55 years	4.9	17.8	33.3***	34.7	41.0***	35.3	35.6***
Nationality	Chilean	72.8**	52.3	72.7	91.3	98.0***	91.4	97.9***
	Venezuelan	23.3**	31.8	18.2	4.4	1.2***	4.1	1***
	Other	3.9**	15.9	9.1	4.3	0.8***	4.5	1.1***
Highest Education	High school or less	39.8**	56.8	45.5*	68.8	63.7***	66.7	59.3***
	Technical degree	24.3**	29.5	13.8*	9.7	7.9***	10.3	7.1***
	University	34.0**	11.4	31.8*	19.1	25.2***	20.3	29.1***
	Postgraduate studies	1.9**	2.3	9.1*	2.4	3.2***	2.7	4.5***
Marital Status	Single	67.0	65.9	40.9	44.5	44.5**	40.3	42.3*
	Separated/Divorced/Widowed	3.9	4.5	13.6	8.1	7.7**	12.9	11.8*
	Married/Civil Union/Cohabiting	29.1	29.5	45.5	47.3	47.8**	46.8	46.0*
Observations (unweighted data)		103	44	22	71,618	1,173	81,099	1,666

Percentages exclude observations with unreported or invalid values. †National and Valdivia statistics include expansion factors to match respective populations. The table includes Fisher's exact test results for homogeneity of two qualitative distributions (null hypothesis: distributions are identical across populations). The distributions compared are: riders between the 2022 and 2024 gig surveys (column 3); riders and drivers in the 2024 gig survey (column 5); workers in Valdivia from the ENE 2022 versus riders in the 2022 gig survey (column 7); workers in Valdivia from the ENE 2024 versus riders in the 2024 gig survey (column 9). Traditional significance levels: *p < 0.1; **p < 0.05; ***p < 0.01. Source: Own elaboration based on Gig survey 2022, Gig survey 2024 and National Employment Survey

The first notable finding concerns the demographic specificity of these workers. As shown in Table 1, 90% are male, compared to 49% in the national urban labor market. Moreover, these workers tend to be younger than the national average, with the 26–35 age group being the most common among gig workers and the 46–55 age group the least common—opposite to the trends observed in the national urban labor market. The gig sector also has a relatively high proportion of foreign workers (particularly Venezuelans) and tends to have a higher level of education. These differences remain statistically significant at the 5% or 1% level when compared to urban workers in Valdivia, as reflected in the table. Another notable difference is observed between riders and drivers. Drivers tend to be older and have a higher educational level on average, with these differences being statistically significant. Although not statistically significant, there is a higher proportion of Chileans among drivers (consistent with national trends). This likely reflects the higher cost of acquiring a car compared to a motorcycle or bicycle for delivery tasks—a critical factor for migrants integrating into the labor market.

3.2) Employment characteristics

Table 2 provides labor-related information for riders and drivers from both the 2022 and 2024 gig surveys, as well as data from the ENE for corresponding periods. [4] Among riders and drivers, a bimodal distribution is evident. One group works more than 40 hours per week, while another works fewer than 10 hours per week, reflecting two coexisting profiles in this sector: those who treat gig work as a full-time job and those who use it as a supplementary income source. This contrast is more pronounced when examining the percentage of total income derived from these activities. Gig work is the primary income source for riders, whereas it serves as a complementary source for most drivers. These profiles align with the motivations for participating in gig work, discussed in detail in Section 4. In short, riders often view their work as the most profitable option available, while drivers engage in gig work due to a

[4]Income statistics for the April-June 2024 quarter are not available. The ESI only covers the October-December quarter each year.

lack of better options or as a supplement to other income-generating activities. For comparison, Table 2 also includes information on hours worked and income from the primary activity for urban workers overall and workers in Valdivia. The previously mentioned bimodal distribution is absent from the broader workforce, where most workers dedicate most of their workweek (+30 hours) to their primary activity (whether gig or non-gig work) and derive nearly all of their income from it.

4) Work motivations for riders and drivers

The 2024 gig survey asked workers to select from a predefined list of motivations for all the important factors to them, as well as the most important one. The results are presented in Table 3. For riders, monetary reasons stand out as the most important motivation, which is much less significant for drivers. For drivers, the temporary nature of the activity is more prominent, as many are either searching for another job or simply supplementing other income. This aligns with the findings in Table 1, which show that riders have relatively lower levels of education compared to drivers.[5]

For both groups, the flexibility offered by gig work is highly valued, though it is not the primary motivation for most. This flexibility is utilized by the majority, as Figure 2 shows that about 60% of workers reported working the number of hours they desired, with the remaining 40% divided between working fewer or more hours than desired.

[5]A technical or university degree is not required to work as a rider or driver. The opportunity cost is lower for individuals without such qualifications.

Table 2 – Job characteristics of workers from selected surveys (values represent percentages within each subgroup relative to the respective variable)

		Gig survey, Oct-Nov 2022 (Valdivia)	Gig survey, May 2024 (Valdivia)		National Employment Survey, Oct-Dec 2024		National Employment Survey, Apr-Jun 2024	
Variable	Subgroup	Riders	Riders	Drivers	Urban Workers†	Valdivia Workers†	Urban Workers†	Valdivia Workers†
Weekly working hours as rider/driver (Gig survey) or in main activity (ENE)	Less than 10 hours	16.5	27.3	27.3	8.3	11.5	9.3	11.3
	10 to 20 hours	12.6	6.8	13.6	7.8	9.0	7.7	9.5
	20 to 30 hours	17.5	11.4	4.5	9.1	9.0	8.1	10.7
	30 to 40 hours	14.6	18.2	13.6	12.0	15.0	16.7	17.8
	More than 40 hours	38.8	36.4	40.9	62.9	55.4	58.1	50.7
Percentage of total income from rider/driver activities (Gig survey) or main activity (ENE)	Less than 20%	3.9	13.6	31.8	5.8	4.6	N/A	N/A
	20% to 40%	9.7	6.8	22.7	0.2	0.1	N/A	N/A
	40% to 60%	10.7	6.8	13.6	0.8	0.8	N/A	N/A
	60% to 80%	8.7	15.9	13.6	1.6	2.2	N/A	N/A
	More than 80%	67.0	56.8	18.2	91.7	92.4	N/A	N/A

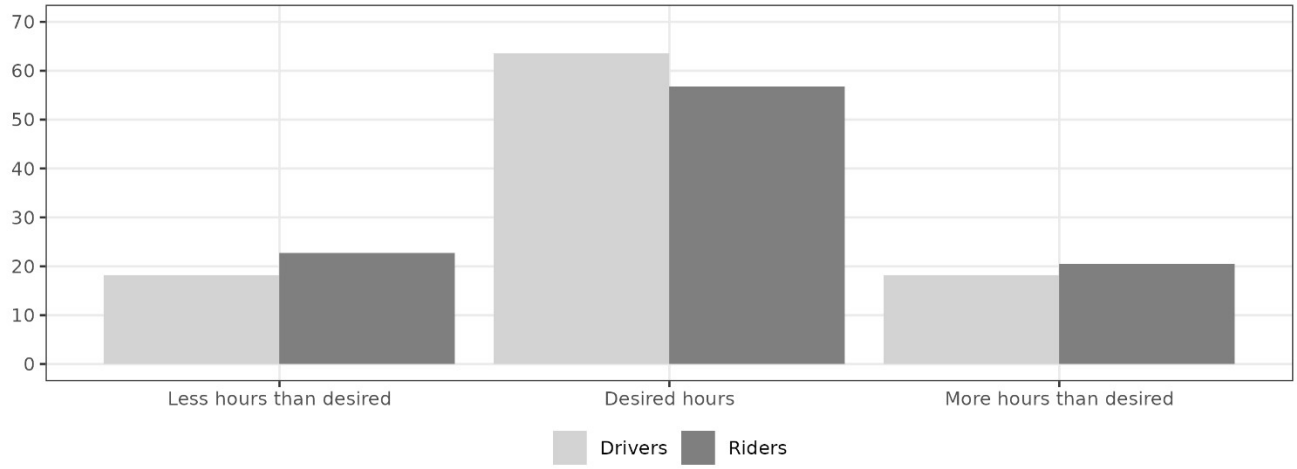
†National and Valdivia statistics are weighted to match respective populations. N/A: Not available. Source: Own elaboration based on Gig survey 2022, Gig survey 2024 and National Employment Survey

Table 3 – Reasons cited by riders and drivers as motivation for participating in gig work (% of total respondents) – gig survey 2024

	Riders		**Drivers**	
Reason	Important Reason (%)	Main Reason (%)	Important Reason (%)	Main Reason (%)
Leisure activity – I enjoy it	12.8	5.1	11.1	0.0
Pay is better than my previous job	35.9	10.3	11.1	5.6
Pay is better than other available jobs	43.6	35.9	5.6	5.6
Irregular migration status	15.4	7.7	0.0	0.0
Working while looking for a better job	0.0	0.0	5.6	5.6
Could not find another job	17.9	12.8	33.3	33.3
To supplement income from other jobs	15.4	7.7	38.9	27.8
To earn money while studying	20.5	15.4	0.0	0.0
Flexibility to choose working hours	33.3	5.1	61.1	22.2
Total observations	**44**	**100%**	**22**	**100%**

Source: Own elaboration based on Gig survey 2024

Figure 2 – Hours worked vs. desired (gig survey 2024) (Percentage relative to the total respondents for each type of gig activity)



Source: Own elaboration based on gig survey 2024

Regarding the mismatch between desired and actual hours worked, the dominant reason among drivers who work both more and fewer hours than desired is lower-than-expected earnings. This reflects heterogeneous wage elasticity among drivers, likely influenced by their specific income needs and financial pressures (Camerer et al. 1997). For riders, those working more hours than desired often attribute this to higher earnings compared to alternative jobs, a particularly attractive opportunity for foreign workers, who dominate this sector. Riders who report working fewer hours than desired cite job fatigue or lack of time as reasons.

5) Job satisfaction

The literature on measuring job satisfaction offers a wide range of approaches. This study evaluates satisfaction from both a direct, multifaceted perspective and a global perspective (see Judge et al. 2020 for a broader taxonomy). The multifaceted perspective focuses on dimensions particularly relevant to the gig economy (e.g., flexibility, pay, and security). The global perspective assesses overall job satisfaction without reference to subcomponents. Both approaches are direct, asking respondents to rank their satisfaction using a Likert scale rather than inferring it indirectly from other questions. The

scale consists of five levels: very dissatisfied, dissatisfied, neither satisfied nor dissatisfied, satisfied, and very satisfied.

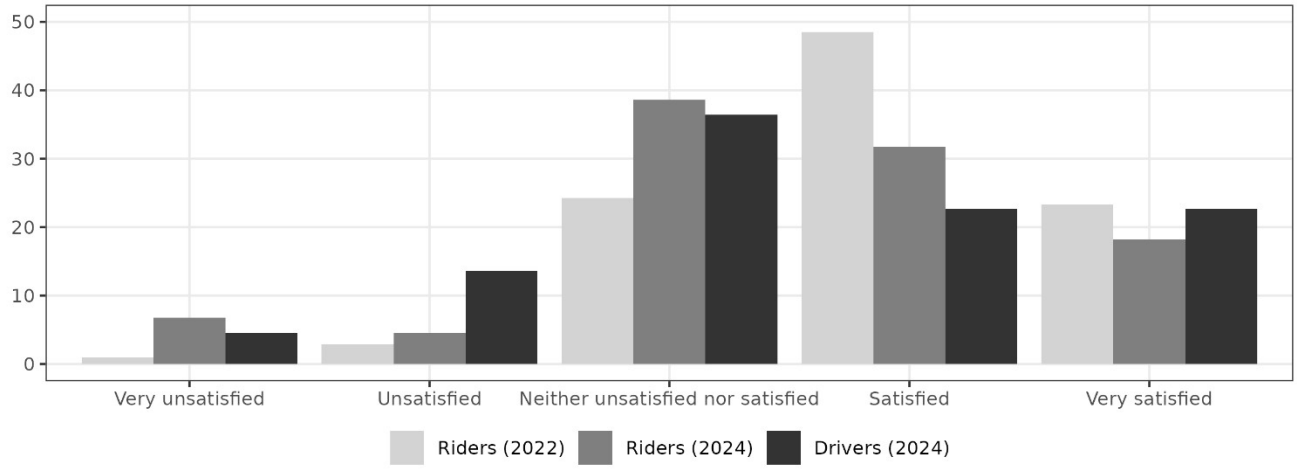
The 2022 gig survey uses both perspectives (multifaceted and global), while the 2024 gig survey evaluates only global satisfaction to allocate more space for questions about work motivations and the impact of gig-related laws. Below, the main descriptive results are presented, followed by a bivariate and multivariate statistical association analysis.

5.1) Global satisfaction levels

Figure 3 presents the results for global job satisfaction (i.e., an overall perspective rather than focusing on specific aspects such as pay, security, or flexibility). At first glance, the relatively high satisfaction levels among riders stand out, with nearly 72% reporting a positive level of satisfaction in 2022 and 50% in 2024, with almost all remaining respondents indicating indifference.

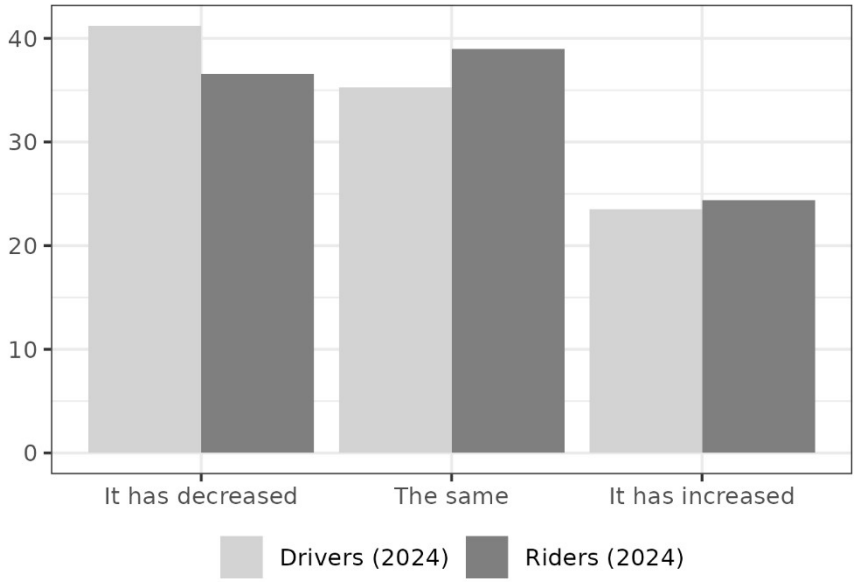
Riders' satisfaction levels in 2022 are nearly identical to the findings from the ILO (2021) survey, which surveyed riders in Santiago de Chile during the second half of 2019. However, there is a noticeable drop in global satisfaction among riders between 2022 and 2024, as shown in Figure 3. A similar decline would likely apply to drivers if the ILO results were used as a comparative baseline. Additionally, the 2024 gig survey included a direct question about changes in satisfaction compared to the previous year. Figure 4 shows the results, excluding respondents who were not working as riders or drivers a year prior (12% of the total). Only a quarter of respondents reported an increase in satisfaction, with the remainder split between lower and unchanged satisfaction levels.

Figure 3 – Global satisfaction level with gig activity (percentage relative to the total, by worker type and survey)



Source: Own elaboration based on Gig survey 2022 and Gig survey 2024

Figure 4 – Change in global satisfaction level (percentage relative to the total, by worker type)



Source: Own elaboration based on Gig survey 2024

5.2) Global job satisfaction and its subdimensions (gig survey 2022 only)

In addition to global satisfaction analyzed earlier, the 2022 survey (riders only) asked about satisfaction in four specific dimensions: satisfaction with platform support channels for resolving issues, work flexibility, leisure time availability, and payment received. These dimensions used the same 5-point

Likert scale as global satisfaction. Table 4 shows five tests of statistical association between global satisfaction and its subdimensions. Payment is highly significant across all methods. In the logistic model, it is the only significant factor due to multicollinearity among the four variables. At the bivariate level, leisure time and support channels show greater significance. Interestingly, work flexibility does not appear to be a particularly relevant factor compared to the others. This is unsurprising, as the survey covers only riders, and work flexibility is particularly valued by drivers, as highlighted in Table 3 (see also Asenjo and Coddou, 2021).

Table 4 – Relationship between global satisfaction and its subdimensions using different metrics (riders, gig survey 2022, 103 observations)

Variable	Fisher's Exact Test p-value	Cramer's V Correlation	Kendall's Correlation	Ordered Logistic Model Coefficient	Ordinal Forest Variable Importance
Support Channels	0.01**	0.20 (moderate)	0.10	-0.11	0.03
Work Flexibility	0.07*	0.15 (moderate)	0.24*	0.27	0.01
Leisure Time	0.00***	0.32 (high)	0.35***	0.22	0.25
Payment Received	0.00***	0.33 (high)	0.47***	0.93***	0.72

Note: Variables refer to satisfaction levels regarding platform support channels for resolving issues, work flexibility, available leisure time, and payment received, respectively. Fisher's Exact Test evaluates whether two qualitative distributions are identical (null hypothesis) or different (alternative hypothesis). Asterisks indicate p-values for the null hypothesis that the value is zero. Cramer's V ranges from 0 to 1 and is corrected for small sample bias (Bergsma, 2013). Strength levels for Cramer's V are based on Cohen (1988; Table 7.2.3), depending on the number of levels in ordinal variables. Kendall's Correlation transforms ordinal variables into numeric ones (1, 2, 3...), suitable for small samples compared to Spearman's correlation. It is the only metric in the table that provides the direction of the linear relationship. The ordered logistic model omits the gig work category due to severe multicollinearity issues. Asterisks indicate p-values for the null hypothesis that the coefficient is zero. The Ordinal Forest model shows the ranked probability score of each variable, with the total normalized to 1. This score indicates each variable's importance, i.e., how prediction accuracy improves or worsens with its inclusion or exclusion. Traditional significance levels: *p < 0.1; **p < 0.05; ***p < 0.01.
Source: Own elaboration based on Gig survey 2022.

6) Gig economy laws in Chile

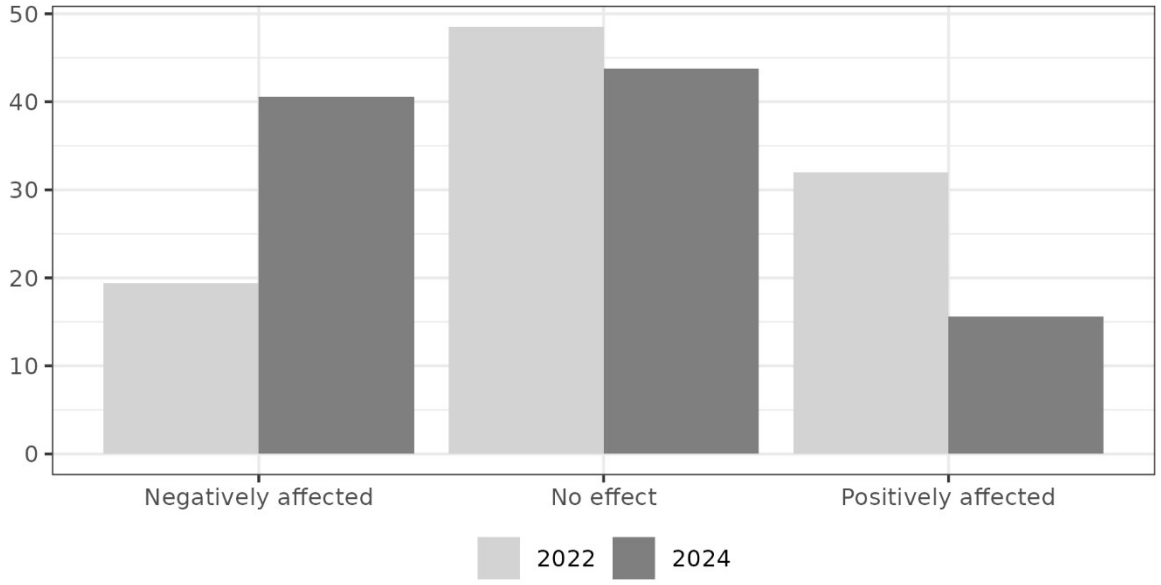
Two laws enacted by the Chilean Congress directly regulate platform-mediated activities. The first law applies to both riders and drivers and was evaluated in the 2022 and 2024 surveys. The second law pertains only to drivers and was assessed in the 2024 survey. Each law is analyzed descriptively, followed by a statistical significance analysis.

6.1) Law No. 21.431 (“Digital Platforms Law”) (Riders: 2022 and 2024 Surveys)

Law No. 21.431, also known as the “Digital Platforms Law,” came into effect on September 1, 2022, six weeks before the data collection for the first gig survey presented here. The law regulates platform workers' activities, granting them a series of rights commonly afforded to formal workers. These include formal contracts, protection of personal information, mandatory training, limits on working hours, minimum pay, union membership, and more. The central milestone of the law is the formal recognition of riders and drivers as “workers,” contrasting with terms typically used by companies, such as “partner,” “rider,” or “contractor.”

The perceived impact of this law on riders’ well-being was evaluated in both the 2022 and 2024 surveys. Figure 5 shows that in 2022, 32% of respondents believed the law had benefited them, a figure that dropped to 15.7% in 2024. Meanwhile, the percentage of respondents who felt the law had harmed them increased from 19.4% in 2022 to 40.6% in 2024.

Figure 5 – Perception of impact in wellbeing regarding law Nº21.431 (Riders, %)



Source: own elaboration based on Gig survey 2022 and Gig survey 2024

This perception may seem surprising, considering that the law was designed to benefit workers. When exploring the reasons why respondents believe the law has harmed them (as asked in the 2022 survey), two main factors were mentioned. First, since working hours were regulated (capping daily connection time at 12 hours), many complained that platforms implemented restrictions on their freedom to choose work hours and locations, reducing the flexibility to select desired hours—an important component of satisfaction, as previously noted. [6] Second, gross income was lower due to the withholding of the provisional monthly tax by the company.

That said, it is interesting that those who reported a positive impact from the law cited similar reasons. First, they highlighted that the 12-hour daily limit allowed for more rest. Second, the law regulated minimum pay, providing greater income security. This illustrates how the same law can have differing subjective effects.

The law recognizes several rights for workers (one of which is being acknowledged as workers, regardless of the terminology used by companies, such as “partner,” “rider,” etc.). Additionally, the law imposes obligations on companies. Are these rights and obligations fulfilled? The 2024 gig survey sought to address this question two years after the law’s implementation. Table 5 presents the results for three aspects of the law from the workers' perspective. First, most respondents indicated that the pay they received exceeded the legally required minimum. Nonetheless, a notable percentage reported non-compliance. The situation was more varied regarding mandatory safety training, with riders reporting higher compliance levels than drivers. Finally, regarding the law’s requirement to provide safety equipment to riders using bicycles or motorcycles, responses were also mixed. The case of UberEats is particularly notable, as only 4% of respondents indicated compliance. As the riders themselves explained in a subsequent question, this is generally due to the additional complication of paying a deposit that UberEats requires to obtain the equipment (a deposit that can be refunded upon return).

[6] No official information was found regarding these changes, but it is possible that they were implemented to optimize service availability during times and in locations with higher demand and profitability.

According to Fairwork (2024), PedidosYa is the only platform that does not charge for safety equipment, which aligns with its relatively high compliance rate in this question.

Table 5 – Percentage of workers reporting compliance with various aspects of the first gig law, by app (gig survey 2024)

Worker Type	App	Minimum Pay	Safety Training	Safety Equipment
Riders	PedidosYa	77.4	61.3	64.5
	Rappi	*0.0*	*100*	*33.3*
	UberEats	60.0	40.0	4.0
Drivers	DiDi	62.5	14.3	N/A
	InDrive	66.7	0.0	N/A
	Uber	84.2	25.0	N/A

Note: Minimum pay refers to the requirement for pay to exceed a legally required minimum. Safety training refers to compulsory training that must be offered to workers. Safety equipment refers to compulsory safety equipment that must be offered to riders. Data for Rappi is italicized due to the small sample size (only 4 respondents reported using this app). N/A: not applicable. Source: Own elaboration based on Gig survey 2024

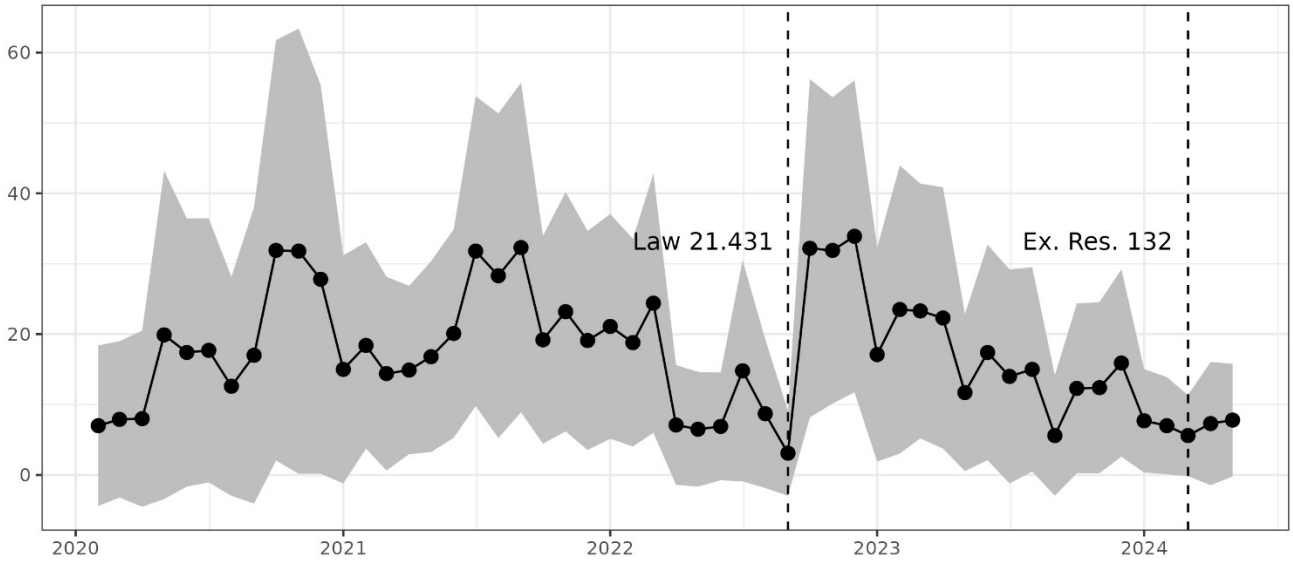
Another important aspect of the new law is recognizing workers' right to form unions. The 2024 gig survey asked about awareness of the existence of unions in the sector and membership in such organizations. Among drivers, 22.7% reported knowing about the right to unionize, compared to 31.8% of riders. It is notable that nearly 90% of Chilean drivers were unaware of this right (compared to 50% of non-Chileans), possibly reflecting the more sporadic and secondary nature of their activity. In contrast, Chilean riders were more aware of this right than non-Chilean riders, though awareness remained low for both groups (39.1% and 24%, respectively).

Among drivers aware of the right to unionize, only 4.5% were members of a union. None of the surveyed riders reported union membership.

The law requires independent workers (the category under which riders and drivers fall) to report their income to the tax authority via pay slips, which was not mandatory before the law's implementation. Since March 1, 2024 (under exempt resolution 132), companies are now required to issue these pay slips on behalf of workers. The effect of these milestones on the issuance of pay slips can be evaluated using data on drivers and riders available in the ENE.

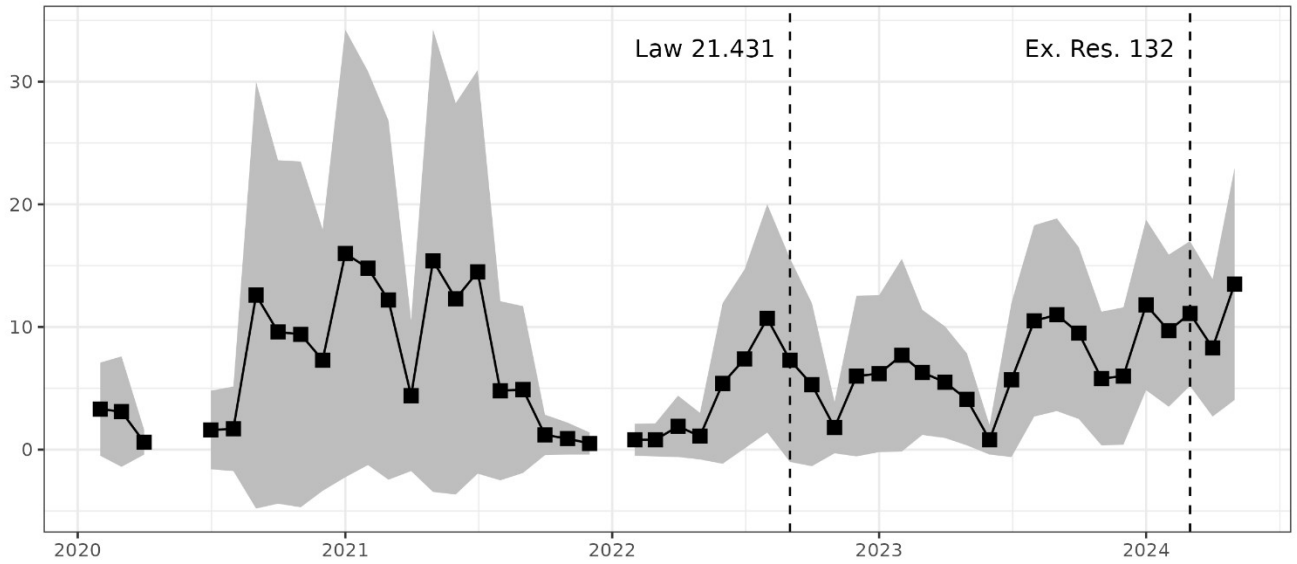
Figures 6 and 7 show the proportion of these workers who issue pay slips, including 95% confidence intervals obtained through *bootstrapping*. First, the low issuance rate is evident throughout the period. Second, riders generally show a higher rate of issuance compared to drivers (an average of 17% versus 6.8% over the entire period, a significant difference at the 1% level). Third, an initially significant effect of Law 21.431 on riders' issuance rates is observed, which almost completely reverses over time. Fourth, no significant effect of exempt resolution 132 has been observed yet. Finally, it can be concluded that, over the entire available period, there is no statistically significant change in the issuance rate of pay slips, reflecting the negligible impact of the law and subsequent regulation.

Figure 6 – Percentage of riders reporting issuance of pay slips



Source: Own elaboration based on data from the National Employment Survey by the National Statistics Institute.

Figure 7 – Percentage of drivers reporting issuance of pay slips



Source: Own elaboration based on data from the National Employment Survey by the National Statistics Institute.

6.2) Law No. 21.553 (“Uber Law”) (drivers, 2024 Survey)

The second law enacted, No. 21.553 (the “Uber Law”), specifically regulates drivers' activities, requiring them to hold a professional driver’s license (as taxi drivers do) and imposing minimum vehicle age and engine displacement requirements, similar to regulations for taxis and other transport services. At the time of writing this document, this law has not yet come into force. However, its effects can already be measured due to the stricter requirements it imposes for participation in this activity.

Specifically, the survey included three questions about the law, the results of which are shown in Table 6. The first question concerns the requirement for an A2-class driver’s license. A total of 18.2% of drivers already hold this license, 40.9% indicated they would obtain it soon, and another 40.9% stated they would stop working in this activity. The second question addresses the vehicle’s engine displacement and age requirements. A total of 45.5% reported that their car already met the law’s requirements, 13.6% indicated they had changed or would change their car, and the remaining 40.9% stated they would leave the activity. Finally, 54.5% of respondents indicated that the new law would harm them as drivers, while only 13.6% believed it would benefit them (the remainder expressed

indifference). Predictably, 75% of those who reported harm also indicated they would stop working as drivers.

Table 6 – Questions on Law No. 21.553 (“Uber Law”) – Percentage of drivers (Gig survey 2024)

Professional driving license		Engine displacement requirement		Impact of the Law	
I already have it	18.2	Car already compliant	45.5	I will benefit	13.6
I will obtain it soon	40.9	I will change vehicle	13.6	Indifferent	31.9
I will leave the activity	40.9	I will leave the activity	40.9	I will be harmed	54.5

Source: Own elaboration based on gig survey 2024

6.3) Statistical association between law impact and other variables

This section analyzes the sociodemographic and employment variables statistically associated with workers’ response to the impact of laws. Sample size is low, so results are merely suggestive. The dependent variable is “Impact of the Law,” ordered as “negative effect, indifferent, positive effect”.

Table 7 presents the statistical association between various sociodemographic and employment variables and the perceived impact of the first law, for riders, based on gig surveys 2022 and 2024. The surveys are not identical, so the variables available for analysis differ as well.[7] It is notable that no same variable is statistically significant across both surveys. In 2022, individuals with lower education levels or younger ages reported relatively greater harm compared to those with higher education or older ages. In 2024, single or divorced individuals and foreign workers reported relatively greater harm compared to those who were partnered or Chilean. Interestingly, individuals who declared gig work as their primary activity reported more harm than those who considered it a secondary activity, although this association was only significant in 2022. It is also noteworthy that the perceived impact was unaffected by the number of hours worked or desired, or by how much of the total income came from gig work.

[7]This table omits multivariate models for the 2024 survey due to their instability. Approximately 25% of the sample did not work as riders or drivers before September 2022 and are excluded from this analysis, further reducing the sample size.

Table 7 - Relationship between law impact and other variables using different metrics (Gig survey 2022, 103 riders; Gig survey 2024, 66 riders and drivers)

	P value of Fisher's Exact Test		Cramer's V correlation		Kendall's correlation		Coefficients of ordered logistic model	Importance in prediction, Ordinal Forest model
Variable	Gig Survey 2022	Gig Survey 2024	Gig Survey 2022	Gig Survey 2024	Gig Survey 2022	Gig Survey 2024	Gig Survey 2022	Gig Survey 2024
Gender (male/female)	0.56	0.45	0.00 (none)	0.18 (low)	0.03	-0.28	-0.05	-0.04
Marital Status (partnered/unpartnered)	0.88	0.07*	0.00 (none)	0.36 (moderate)	0.00	0.41*	-0.02	-0.05
Age	0.04**	0.90	0.21 (moderate)	0.00 (none)	0.25*	-0.19	0.74**	0.05
Education Level	0.02**	0.49	0.20 (moderate)	0.00 (none)	0.25**	-0.19	0.42*	0.19
Nationality (Chilean/Other)	0.68	0.05*	0.00 (none)	0.35 (moderate)	-0.08	-0.40*	0.73	-0.03
Desired Hours (yes/no)	N/A	0.51	N/A	0.00 (none)	N/A	-0.19	N/A	N/A
Actual Hours (ranges)	0.95	0.55	0.00 (none)	0.00 (none)	-0.04	-0.08	-0.11	-0.04
Gig Income as % of Total Income	0.43	0.76	0.01 (none)	0.00 (none)	-0.18	0.15	0.44	0.22
App Offers Monetary Incentives (Likert)	0.00***	N/A	0.34 (high)	N/A	0.14	N/A	0.50**	0.47
Gig Work as Growth Opportunity (Likert)	0.74	N/A	0.00 (none)	N/A	-0.04	N/A	-0.19	-0.17
Feels Safe at Work (Likert)	0.06**	N/A	0.19 (moderate)	N/A	0.19	N/A	0.33*	0.04
Victim of Violence (yes/no)	N/A	0.89	N/A	0.00 (none)	N/A	-0.03	N/A	N/A
Gig Work as Primary Activity (yes/no)	0.01***	0.56	0.27 (low)	0.00 (none)	-0.29**	-0.19	-2.17**	0.57
Belongs to Rider Group (yes/no)	0.31	N/A	0.06 (none)	N/A	-0.15	N/A	-0.34	-0.11
Platform Offers Free Safety Equipment (Likert)	0.57	N/A	0.00 (none)	N/A	0.16	N/A	0.47**	-0.12

Note: see table 4. N/A: variable not available in the survey. Source: own elaboration based on Gig survey 2022 and Gig survey 2024

As shown in Table 8, no significant associations were found between the impact of the second law and sociodemographic or labor characteristics, except for individuals who did not work the hours they desired (significantly negative impact compared to those who worked the hours they desired).[8] This aligns with previous results. In fact, 50% of those reporting harm from the law pursued gig work because they could not find another job. The higher potential costs associated with the law (professional license or new vehicle) are particularly significant for individuals engaging in this work as a second option. Notably, the impact of the law—whether positive, negative, or neutral—appears to be consistent across nationality, the importance of the activity, and the level of income received.

Table 8 - Relationship between law impact and other variables using different metrics (drivers, Gig survey 2024, 22 observations)

Variable	Fisher's Exact Test p-value	Cramer's V Correlation	Kendall's Correlation
Gender (male/female)	0.64	0.00 (none)	-0.27
Marital Status (partnered/unpartnered)	0.85	0.00 (none)	-0.04
Age	0.73	0.00 (none)	0.16
Education Level	0.51	0.11 (low)	-0.07
Nationality (Chilean/Other)	1.00	0.00 (none)	0.06
Desired Hours (yes/no)	0.09*	0.44 (high)	-0.12
Actual Hours (ranges)	0.95	0.00 (none)	0.14
Gig Income as % of Total Income	0.89	0.00 (none)	0.05
Gig Work as Primary Activity (yes/no)	1.00	0.00 (none)	-0.12
Victim of Violence (yes/no)	0.54	0.00 (none)	0.03

Note: see table 4. Source: Own elaboration based on Gig survey 2024

7) Conclusion

This study of the gig economy, the first conducted outside Santiago, reveals relative similarity in the profile of these workers compared to national data, supporting the effectiveness of the sampling process and lending robustness to the general results. Without repeating earlier findings, the results

[8]As with the previous table, this table omits multivariate models due to their instability, which is itself a result of the small sample size.

highlight a clear distinction between two groups: riders and drivers versus other workers, and between riders and drivers themselves. This is the first study to statistically formalize this difference.

The study also delved into job satisfaction and the well-being impact of the two "gig" laws enacted in Chile. Despite the high satisfaction levels observed, challenges remain regarding regulation, which has had a somewhat negative impact thus far, with a pending law likely to have additional negative effects. Workers may not fully perceive less tangible or long-term benefits, such as insurance, legal protections from having a contract, or union recognition, focusing instead on immediate and directly noticeable factors such as working hours and net income. Although any regulation imposes restrictions, the benefits of regulated work are expected to outweigh the costs. This suggests a need for better communication about these benefits, as evidenced by the lack of awareness among workers about their right to form unions. Effective oversight is also necessary to ensure that the rights granted by law are upheld in practice.

The gig economy offers workers (among other things) flexibility and attractive income opportunities (whether sporadic or not) without requiring formal qualifications. These two factors emerge as fundamental in shaping workers' motivation, their satisfaction, and their perception of the laws' impact. It is essential that public and private policies consider these aspects in their design, implementation, and oversight.

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Appendix

Table A1 presents the demographic characteristics of the respondents in Gig survey 2022 and Gig survey 2024 versus gig workers identified in the ENE, for similar reference periods.

Table A1 - Demographic characteristics of gig workers, for selected surveys (values are percentages of each subgroup with respect to the respective variable).

		Gig survey, Oct-Nov 2022 (Valdivia)	National Employment Survey, Oct-Dec 2022	Gig survey, May 2024 (Valdivia)		National Employment Survey, Apr-Jun 2024	
Variable	Subgroup	Riders	Riders	Riders	Drivers	Riders	Drivers
Gender	Male	88.3	80.6	90.9	90.9	80.8*	89.1
	Female	10.7	19.4	4.5	9.1	19.2*	10.9
	Other/Unreported	1.0	0.0	4.5	0.0	0.0*	0.0
Age	18–25 years	38.8	19.4	35.6	8.3	30.8	5.1
	26–35 years	40.8	58.1	37.8	20.8	38.5	31.8
	36–45 years	15.5	16.1	8.9	37.5	23.1	30.8
	46–55 years	4.9	6.5	17.8	33.3	7.7	32.7
Nationality	Chilean	72.8	45.2**	52.3	72.7	42.3	77.6
	Venezuelan	23.3	45.2**	31.8	18.2	42.3	17.3
	Other	3.9	9.7**	15.9	9.1	15.4	5.1
Higher level of education completed	High school or less	39.8	45.2	56.8	45.5	65.4	48.1**
	Technical degree	24.3	22.6	29.5	13.8	15.4	20.5**
	University	34.0	29.0	11.4	31.8	15.4	31.4**
	Postgraduate studies	1.9	3.2	2.3	9.1	3.8	0.0**
Marital status	Single	67.0	58.1	65.9	40.9	46.2	26.9
	Separated/Divorced/ Widowed	3.9	3.2	4.5	13.6	3.8	10.3
	Married/Civil Union/Cohabiting	29.1	38.7	29.5	45.5	50.0	62.8
Number of observations (without expansion factor)		103	31	44	22	26	156

Percentages are calculated omitting observations with non-reported or invalid values. The table includes Fisher's exact test for homogeneity of two qualitative distributions (null hypothesis is that distributions are equal in both populations). The distributions compared are delivery drivers between gig survey 2022 and ENE 2022 (results in column 4); delivery drivers between gig survey 2024 and ENE 2024 (results in column 7); drivers between gig survey 2024 and ENE 2024 (results in column 8). Traditional significance levels s (*: $p < 0.1$; ** $p < 0.05$; *** $p < 0.01$). Source: Own elaboration based on Gig survey 2022, Gig survey 2024 and National Employment Survey