

**PROTECT APP-
BASED DRIVERS
+ SERVICES?**

Survey of California App-Based Rideshare And Delivery Drivers

December 2023



**THE
MELLMAN
GROUP**
RESEARCH
BASED
STRATEGY

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Key Findings

- Three Years After The Passage Of Prop 22, App-Based Rideshare And Delivery Drivers Overwhelmingly Support The Law
 - ✓ 71% Prefer Being Independent Contractors — 51% Strongly — A 3:1 Margin
 - ✓ 84% Say The Flexibility They Get Is Important To Them; 71% Very Important
 - ✓ 79% Say The Ability To Make Extra Money Is Important; 61% Very Important
 - ✓ 83% Support Prop 22 After A Short Description, Including 61% Strong Support
 - ✓ 80% Say Prop 22 Has Been Good For Them
 - ✓ 67% Are Concerned Courts Could Overturn Prop 22 & Say It Should Be Upheld
 - ✓ Only 32% Of Drivers Say They Will Continue Driving If Prop 22 Is Overturned

Methodology

- Survey of 1,021 California App-Based Rideshare And Delivery Drivers Active In The Last Three Months
- Conducted Online October 25 - November 5, 2023
- Conducted With Sample Provided By Uber, Lyft, Instacart, And DoorDash
- Surveys Conducted In Both English And Spanish
- Margin Of Error +/- 3.1% (Higher For Subgroups)

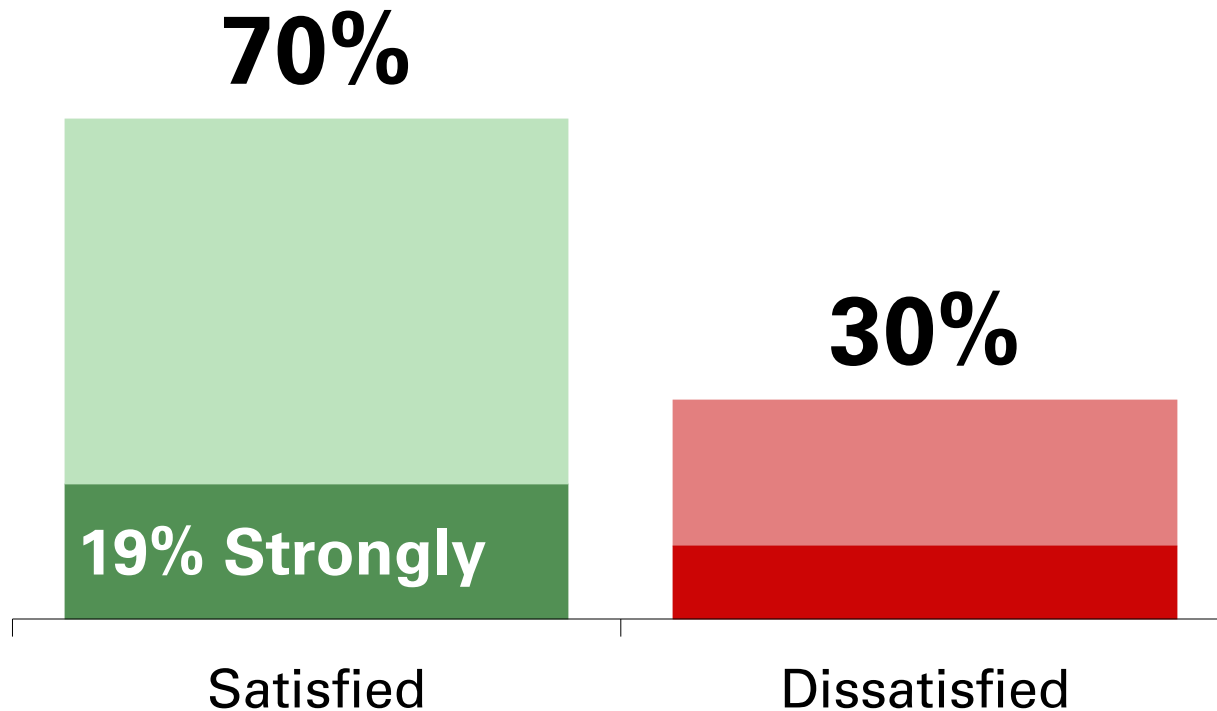


Large Majorities Across Demographics Are Satisfied With Rideshare And Delivery Work

The Large Majority Is Satisfied With App-Based Work

Two-Thirds Are Satisfied Across Demographics Including Start Date And How Much They Drive

In general, how satisfied or dissatisfied are you with your work as a driver or delivery person with app-based rideshare or food and grocery delivery companies?

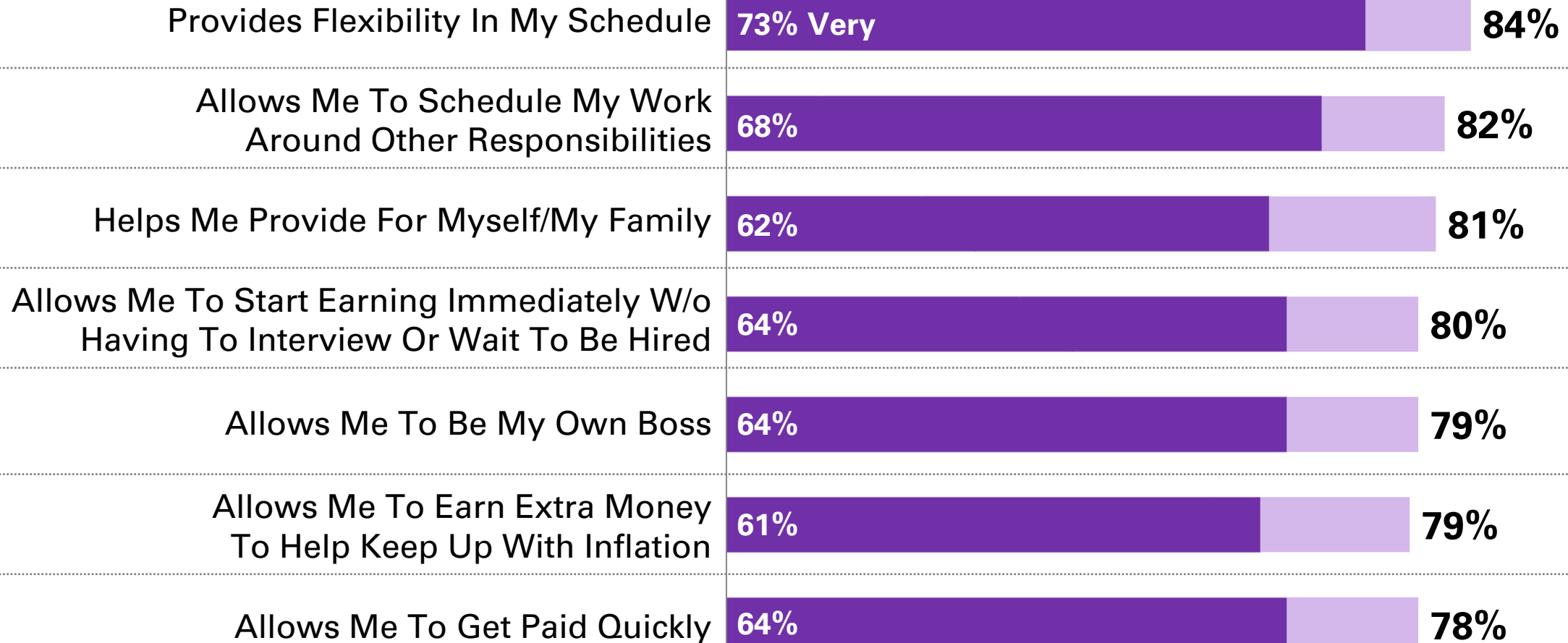


	Satisfied	Dissatisfied
<40	72%	28%
40+	69%	31%
Men	67%	33%
Women	75%	25%
Hispanic	75%	25%
White	64%	36%
Black	70%	30%
Asian	70%	30%
Non-College	72%	28%
College Grad+	66%	34%
Democrat	65%	35%
Independent	72%	28%
Republican	74%	26%
Full time	68%	32%
Part time	71%	29%
Occasional	70%	30%
Started <2021	70%	30%
Started 2021+	68%	32%



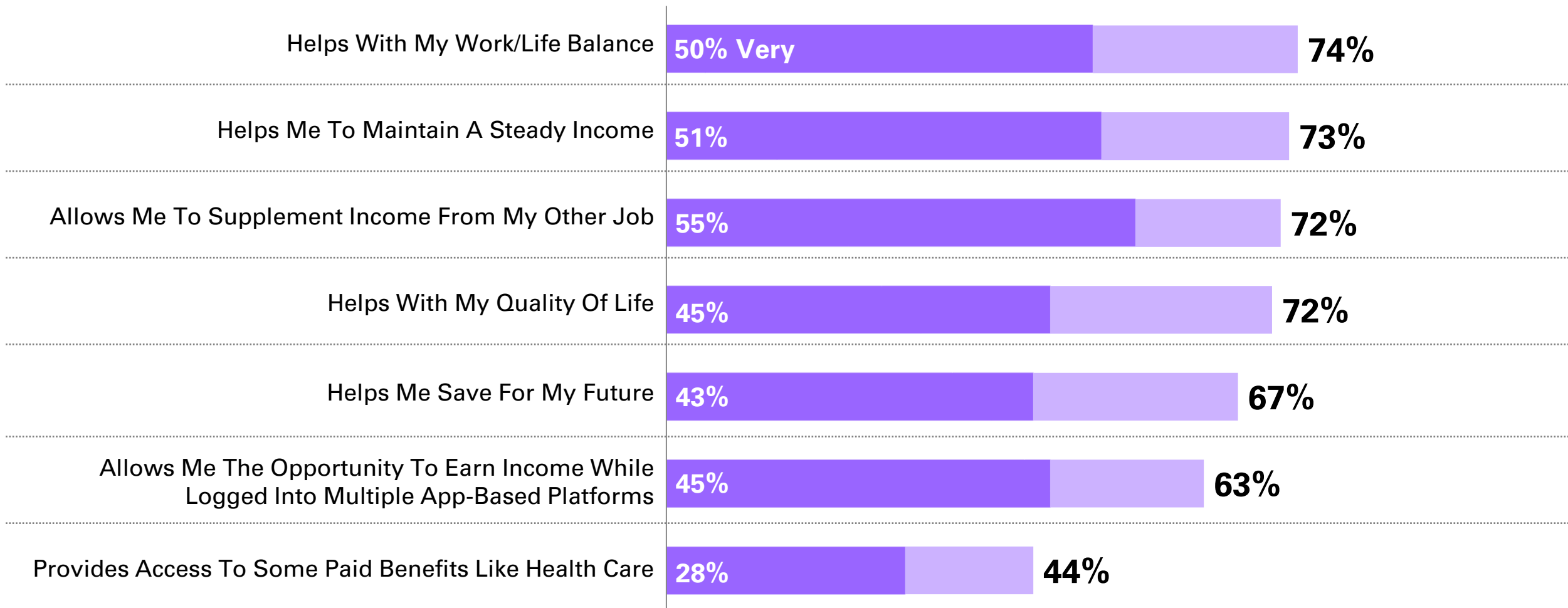
They See The Most Important Qualities Of Their App-Based Work As: The Flexibility To Work Around Other Responsibilities; & Helping To Provide For Themselves And Their Families

*Below is a list of some different qualities of driving or delivering with an app-based rideshare or food and grocery delivery company. Please indicate how important each is to you when you think about driving with an app-based rideshare or food and grocery delivery company. **Ranked by Total Important***



Health Benefits Rank At The Bottom With Only A Plurality Seeing Them As Important

*Below is a list of some different qualities of driving or delivering with an app-based rideshare or food and grocery delivery company. Please indicate how important each is to you when you think about driving with an app-based rideshare or food and grocery delivery company. **Ranked by Total Important***



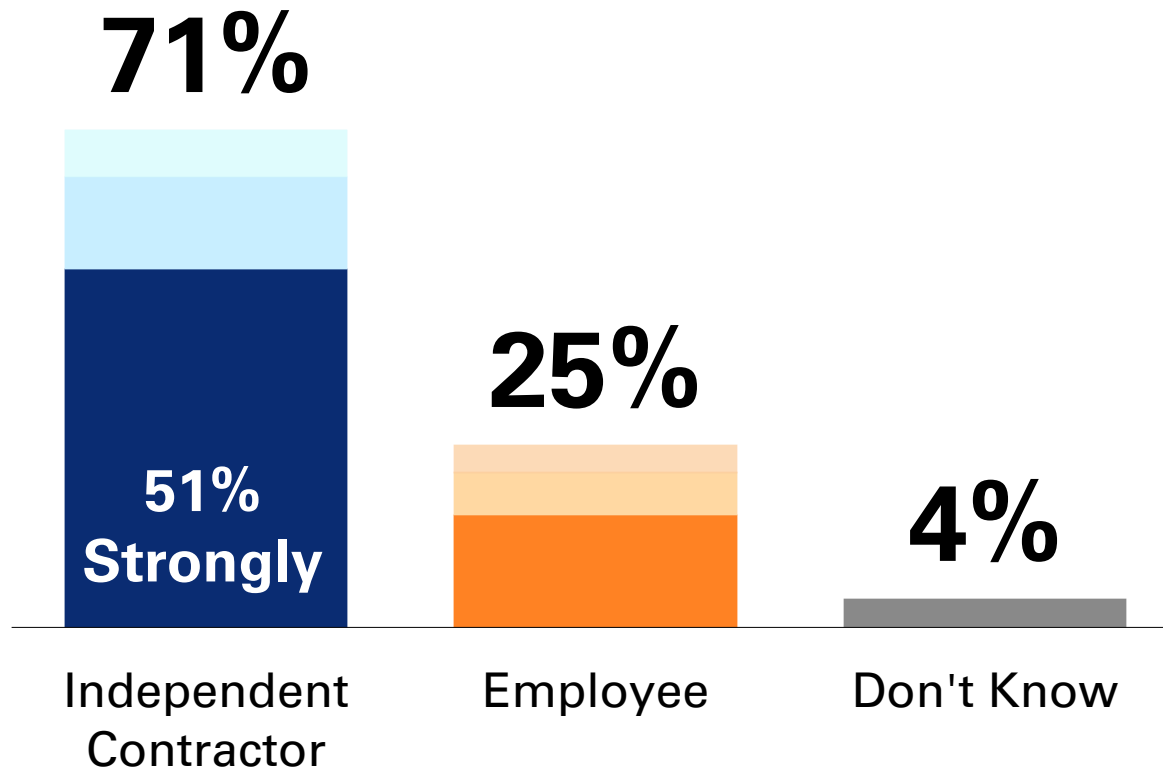
A woman is driving a car, her hands on the steering wheel. She is looking down at a smartphone in her left hand, which displays a map with a blue route. The car's dashboard and center console are visible in the background.

Drivers And Delivery Workers Overwhelmingly Prefer To Be Independent Contractors

By Almost 3:1, Drivers Want To Be Independent Contractors

Two-Thirds Plus Majorities Extends Across Demographics, With Most Feeling Strongly

Thinking about your work driving or delivering with app-based rideshare or food and grocery delivery network companies, do you prefer to be an independent contractor or an employee?



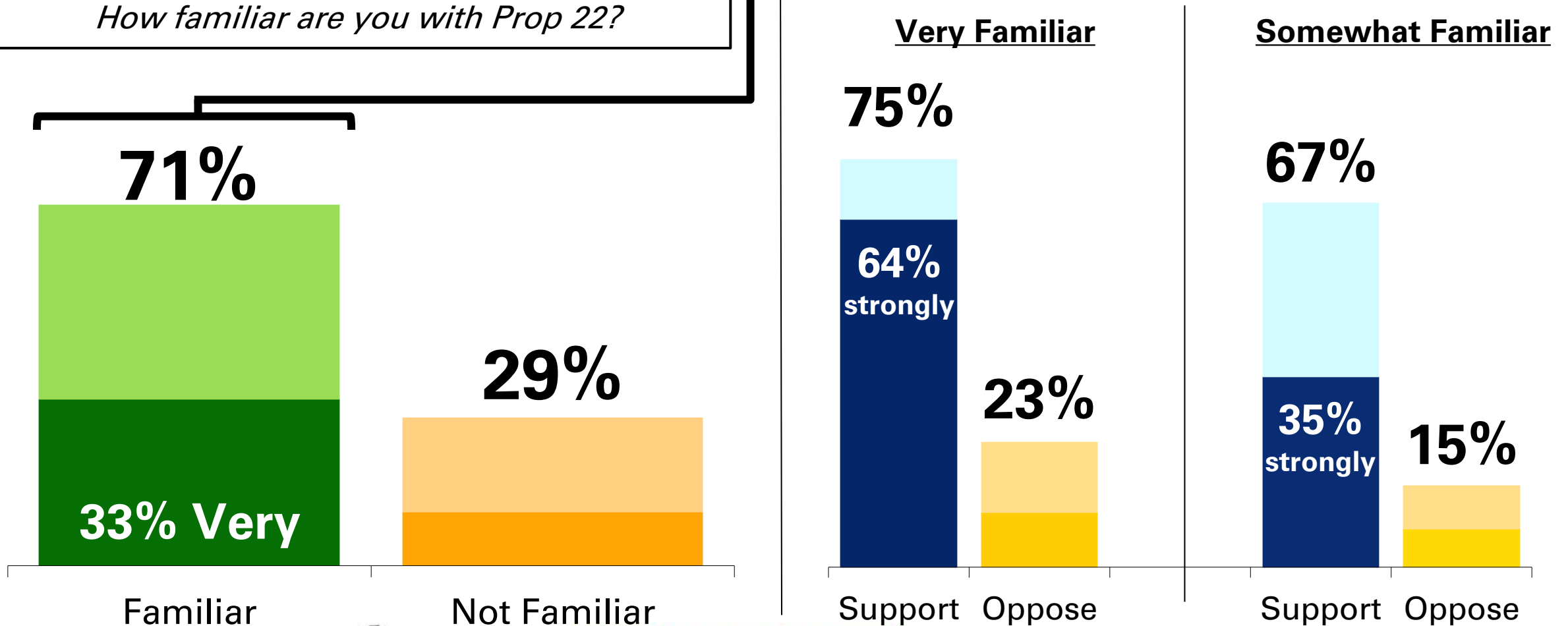
	IC	Employee
<40	70%	26%
40+	74%	23%
Men	73%	25%
Women	68%	25%
Hispanic	68%	27%
White	71%	26%
Black	75%	22%
Asian	73%	26%
Non-College	71%	25%
College Grad+	72%	26%
Democrat	71%	28%
Independent	66%	25%
Republican	77%	20%
Full time	77%	20%
Part time	71%	26%
Occasional	65%	28%
Started <2021	74%	23%
Started 2021+	66%	29%

Most Are Familiar With Prop 22 And Are Supportive

The More They Know, The More Supportive They Are

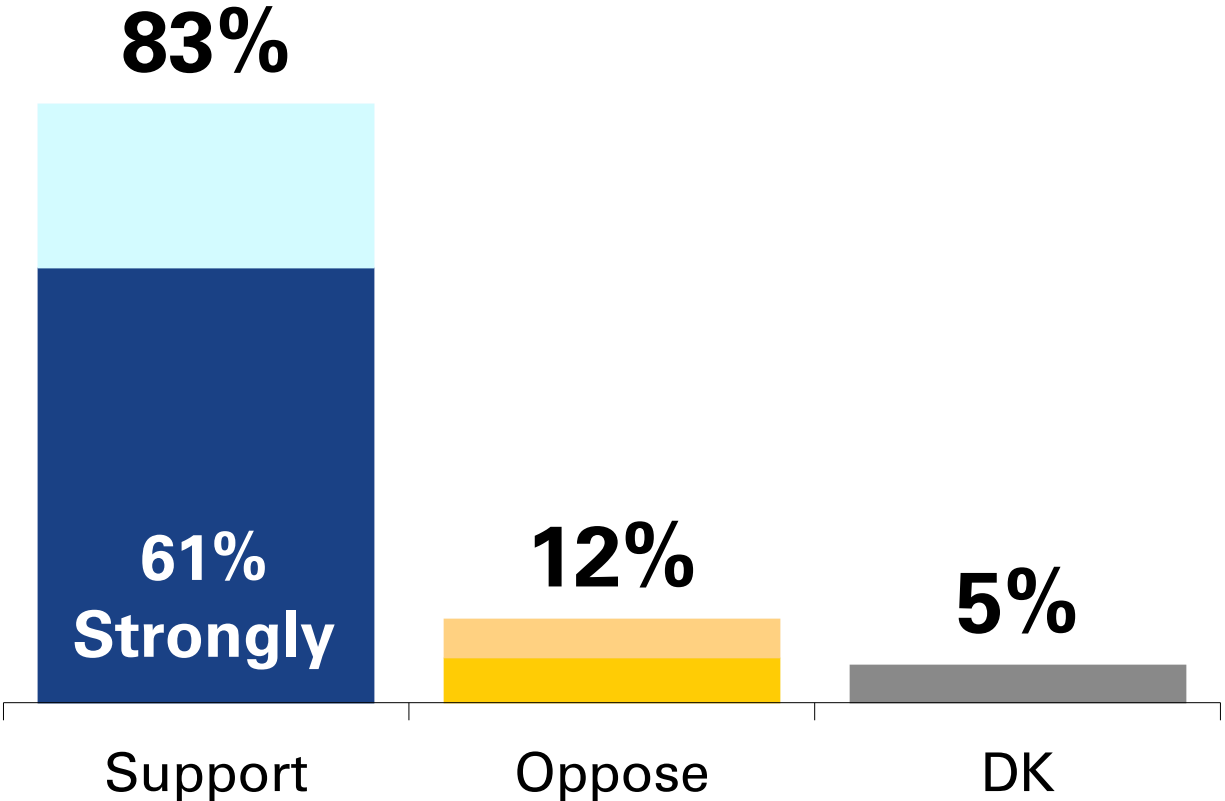
As you may know, Proposition 22, or "Prop 22", dealing with app-based jobs, was approved by California voters in the November 2020 election. How familiar are you with Prop 22?

Based on what you know about Prop 22, do you support or oppose it?



After A Description Of The Law, Almost All Support Prop 22, Including Majority Strong Support Across Demographics

Just so we are on the same page, Prop 22, which passed in 2020, guarantees that people driving with app-based rideshare and food and grocery delivery companies can continue to work as independent contractors. It also provides for new benefits like a minimum earnings guarantee, a health care stipend, and occupational accident insurance to cover injuries and illnesses acquired on the job. Given what you've heard, do you support or oppose Prop 22?



	Total Support	Strong Support	Total Oppose
<40	86%	61%	9%
40+	82%	62%	14%
Men	81%	55%	15%
Women	88%	71%	6%
Hispanic	84%	62%	10%
White	84%	57%	13%
Black	90%	66%	8%
Asian	78%	61%	16%
Non-College	86%	62%	9%
College Grad+	80%	59%	16%
Democrat	83%	64%	14%
Independent	80%	56%	12%
Republican	88%	62%	7%
Full time	87%	67%	11%
Part time	82%	61%	14%
Occasional	83%	56%	9%
Started <2021	82%	60%	14%
Started 2021+	87%	63%	8%



All Provisions Get Broad, Strong Support

Mileage & Flexibility Are At The Top, But Protecting Earning Is The Most Important

Prop 22 Provisions And Benefits, Ranked By % Total Support

			<u>1st or 2nd</u> <u>Most Important</u>
Mileage Reimbursement For Vehicle Expenses, With Adjustments For Inflation	 70% Strong	81%	41%
Protects The Flexibility To Work As ICs With Control Over When, How Often, And How Long....People Work	 67%	80%	51%
Earnings Guarantee So Drivers & Delivery People ... Earn At Least 120% Of Min. Wage, With No Ceiling	 66%	80%	64%
Up To \$1mil in Occupational Accident Ins. For Injuries/ Illness...& Dependent Benefits [For] Death On The Job	 62%	78%	12%
Automobile Accident And Liability Ins. \ Coverage While On The Job	 62%	77%	12%
Health Care Stipend That Helps Cover The Cost Of An Individual Health Plan	 50%	70%	11%

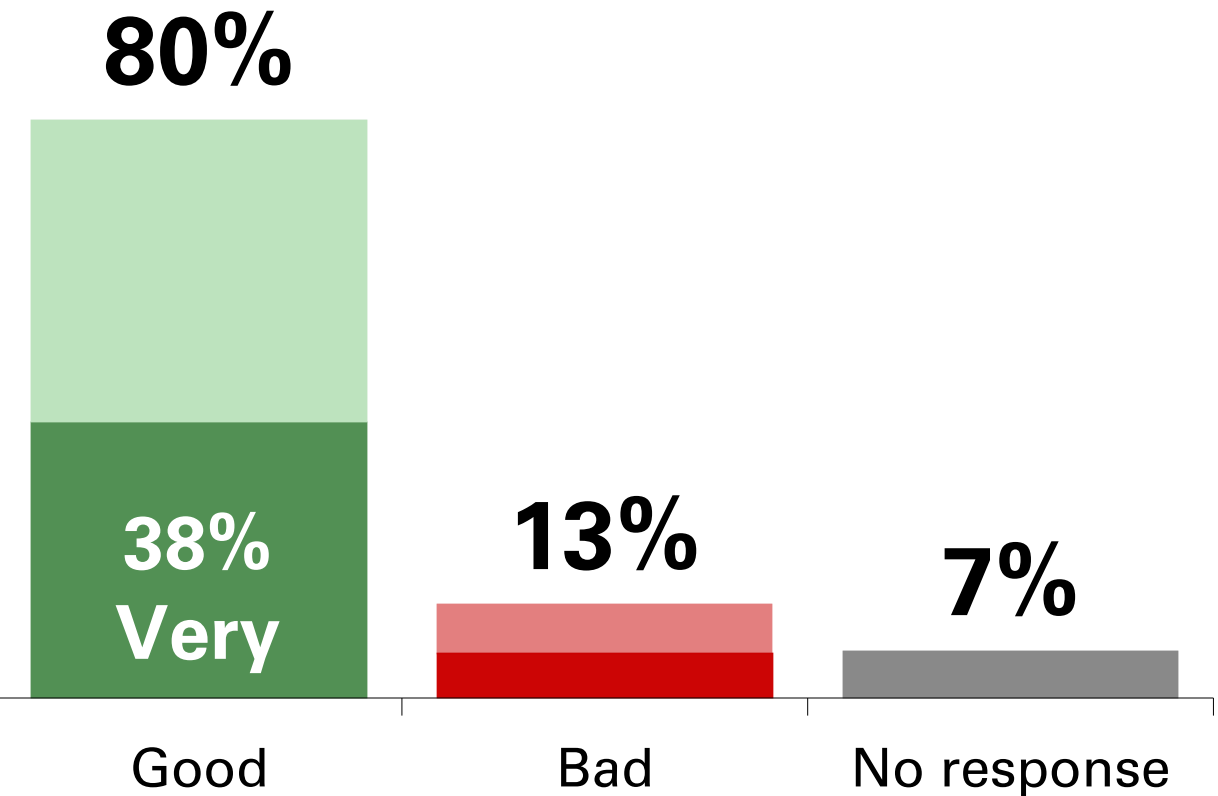


A photograph taken from the driver's seat of a car, looking out onto a multi-lane highway. The steering wheel is visible on the left, and a smartphone mounted on the dashboard displays a navigation app. The rearview mirror is at the top center. The background shows other vehicles and highway infrastructure under a clear sky. A large white text box with a black border is superimposed over the center of the image.

Drivers Feel Prop 22 Has Been Good For Them Personally, Protecting Their Freedom and Flexibility & Increasing Their Earnings

By A 6:1 Margin, Drivers Feel Prop 22 Has Been Good For Them

Overall, as a driver or delivery person, has Prop 22 been very good, somewhat good, somewhat bad, or very bad for you?

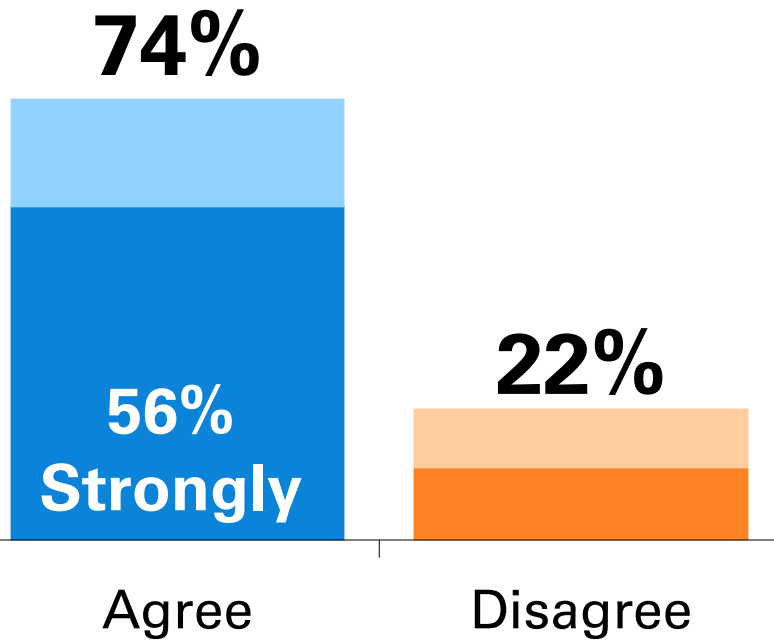


	Good	Bad
<40	84%	8%
40+	79%	16%
Men	79%	17%
Women	86%	6%
Hispanic	84%	9%
White	81%	13%
Black	88%	6%
Asian	75%	19%
Non-College	84%	11%
College Grad+	77%	16%
Democrat	82%	13%
Independent	79%	13%
Republican	80%	14%
Full time	83%	14%
Part time	80%	14%
Occasional	78%	11%
Started <2021	78%	16%
Started 2021+	85%	8%

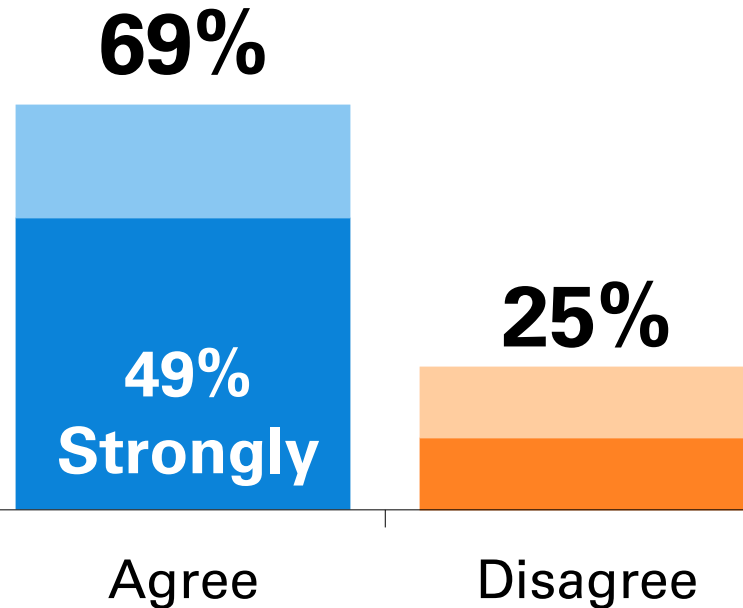
Large Majorities See Prop 22 As Protecting Their Flexibility, Benefiting Them Personally & Increasing Their Earnings

Prop 22 Statements, Ranked By % Total Agree

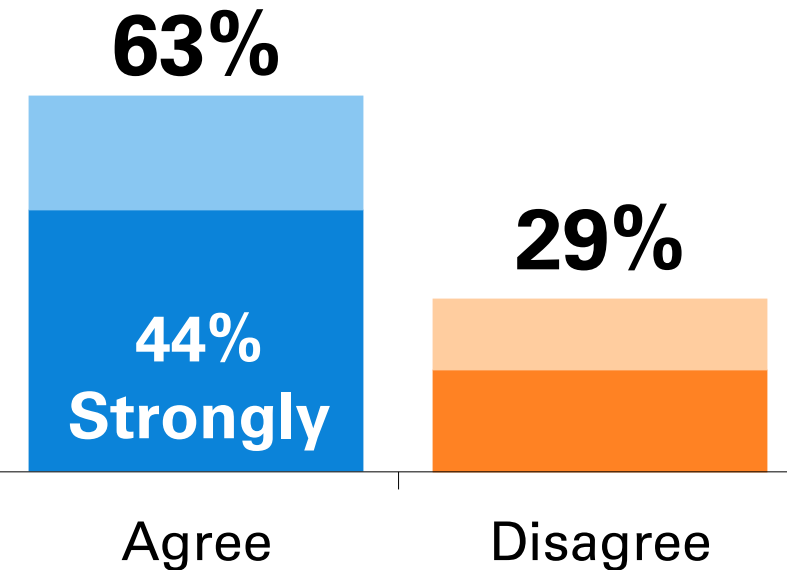
My Freedom And Flexibility



Benefits Me Personally



Increased My Overall Earnings

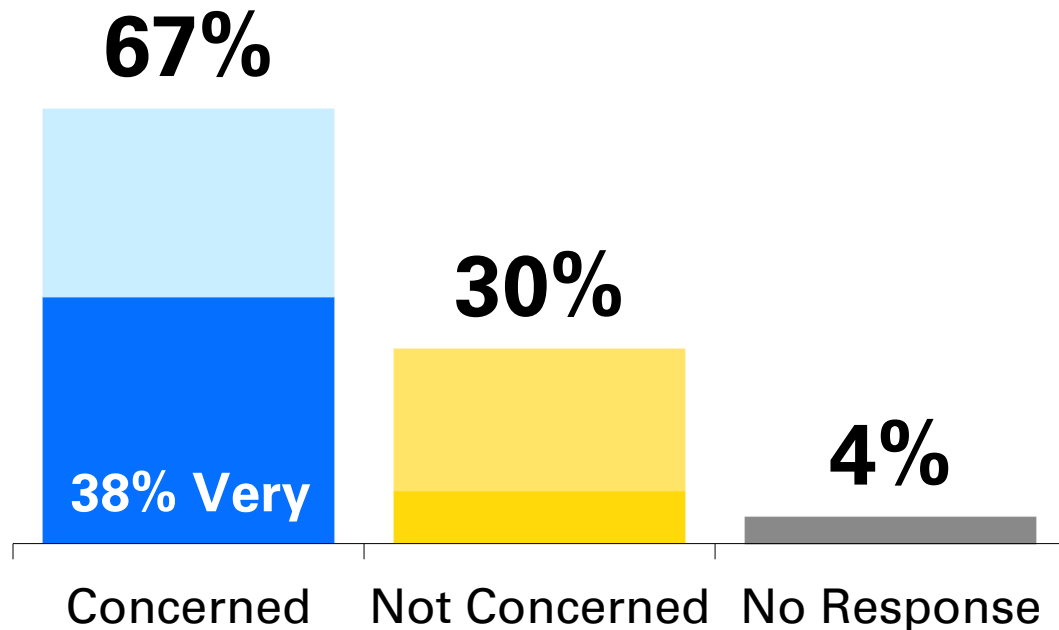


Drivers Are Concerned The Courts Could Overturn Prop 22 & Only A Third Will Continue Driving If They Do

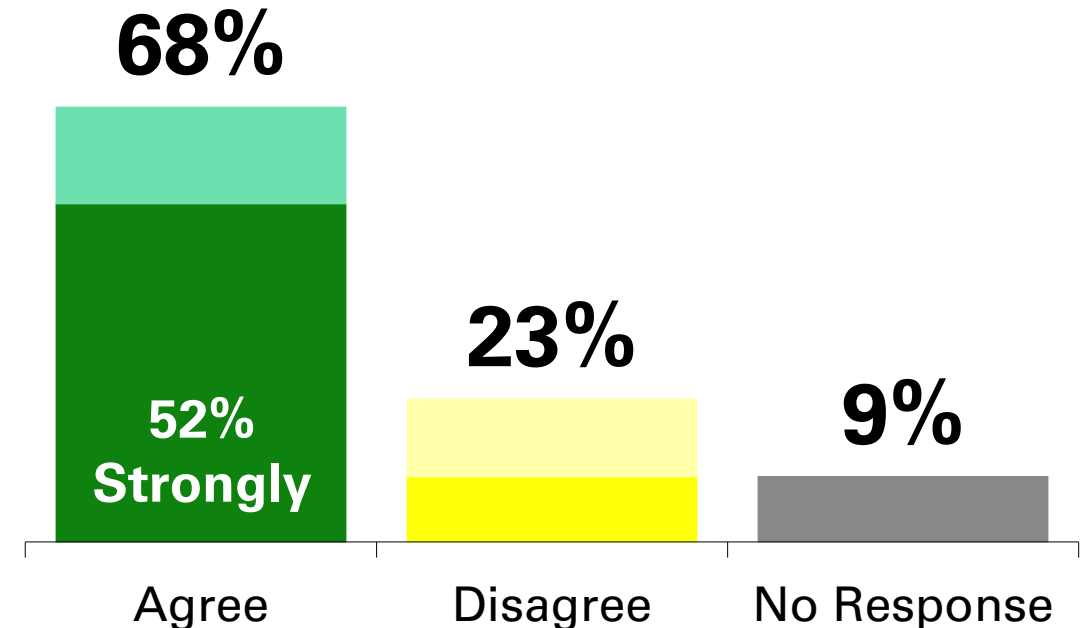


Two-Thirds Are Concerned Courts Could Overturn Prop 22 And Believe It Should Be Upheld

As you may know, there is a legal challenge against Prop 22. The California Supreme Court will be deciding whether Prop 22 is legal or not. If [it] is overturned by the courts, those that drive on app-based platforms could be forced to become employees instead of independent contractors. How concerned are you that the court could overturn Prop 22?



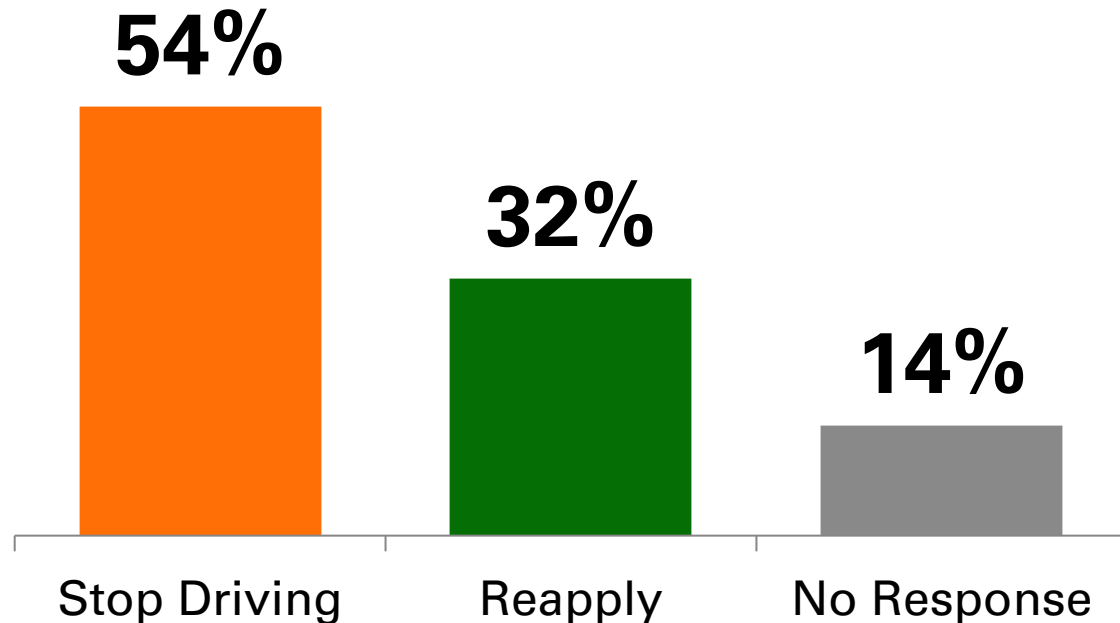
Do you agree or disagree with the following statement: Prop 22 should be upheld by the courts since a majority of California voters passed it



Only A Third Would Continue Driving If Prop 22 Is Overturned

This Increased Slightly From Two Years Ago

If Prop 22 is overturned, those working on app-based platforms may no longer be able to drive as independent contractors and instead could be forced to re-apply to be hired as employees with only one company that would set a fixed schedule with a fixed wage. If Prop 22 is overturned, would you stop driving and delivering for an app-based company or reapply to continue driving as an employee?

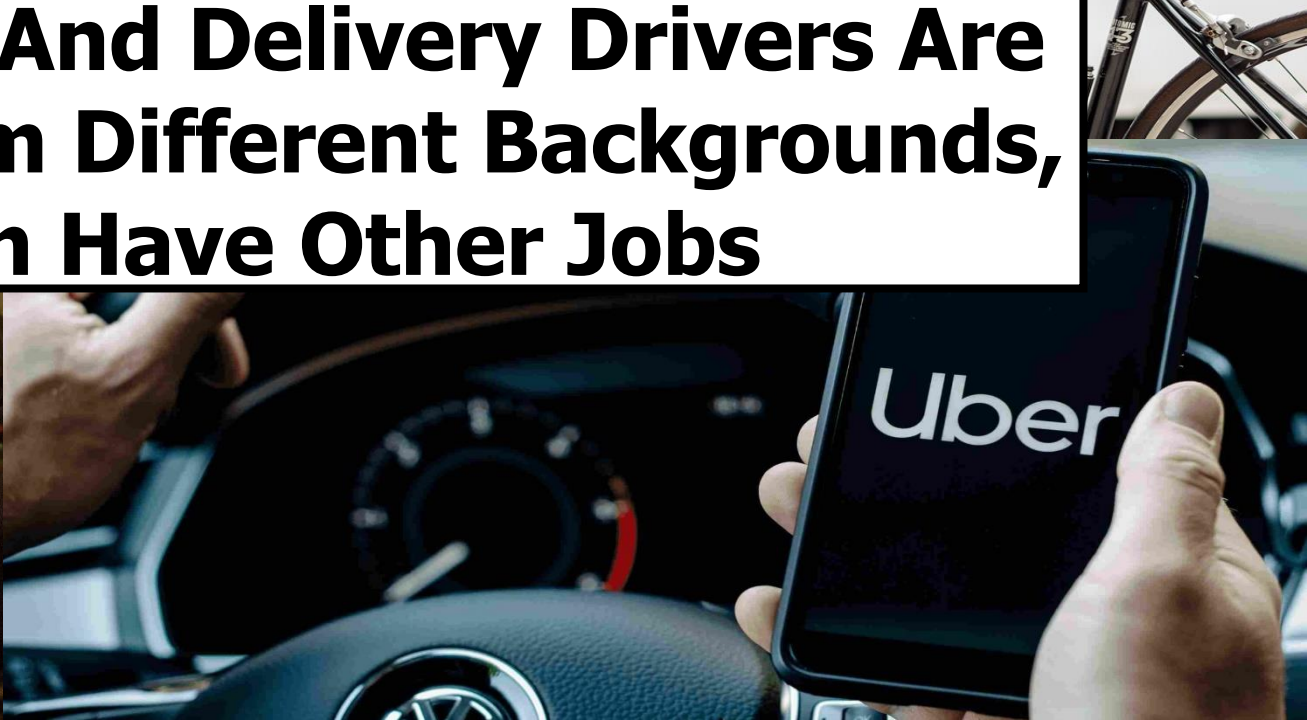
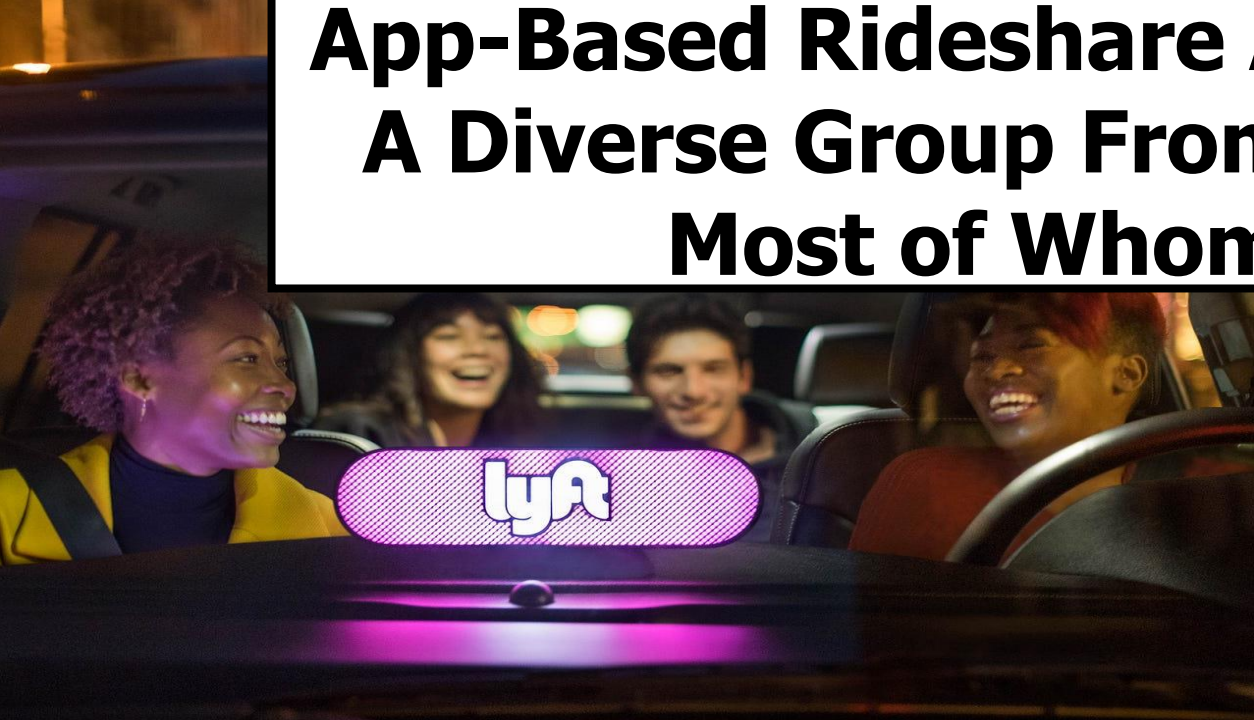


	Stop Driving	Reapply
<40	56%	33%
40+	52%	33%
Men	55%	33%
Women	54%	31%
Hispanic	54%	36%
White	52%	32%
Black	65%	29%
Asian	52%	37%
Non-College	54%	33%
College Grad+	55%	32%
Democrat	51%	36%
Independent	49%	32%
Republican	65%	27%
Full time	48%	35%
Part time	51%	37%
Occasional	62%	25%
Started <2021	53%	34%
Started 2021+	57%	28%





App-Based Rideshare And Delivery Drivers Are A Diverse Group From Different Backgrounds, Most of Whom Have Other Jobs



Drivers Are Diverse Cutting Across Demographic Lines – Including Parents, Family Caregivers, Unions Members And Veterans

Age/Gender/Race	
18-29 Yrs Old	24%
30-39	29%
40-49	18%
50+	19%
Male	55%
Female	40%
Hispanic	35%
White	33%
Black	11%
Asian	10%
Immigrants	23%
Asia	11%
Latin America	7%

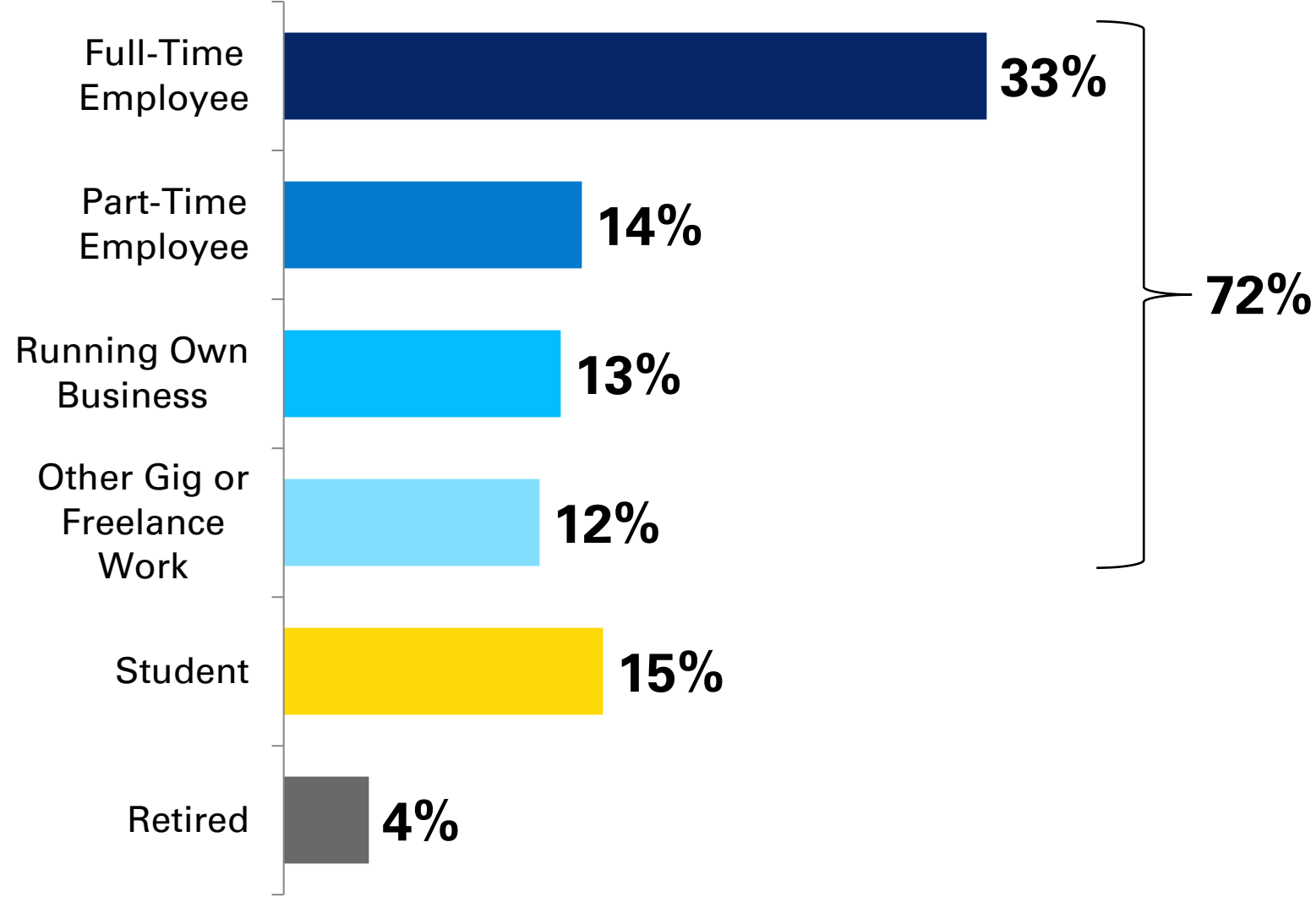
Education/Class/Party	
College+	34%
Non-College	63%
Student (voc-ed, college,+)	15%
Upper Middle	8%
Middle	27%
Working/Lower	57%
Democrat	39%
Independent	36%
GOP	24%

Family	
Single	51%
Married	34%
Divorce/Separated	11%
Kids	44%
Under 18	28%
Caregiver for adult	12%

Has a Disability	13%
Union Household	15%
Military/Vet Household	9%



Three-Quarters Of Drivers Have Other Full Or Part-Time Jobs Covering A Wide Range Of Industries And Sectors

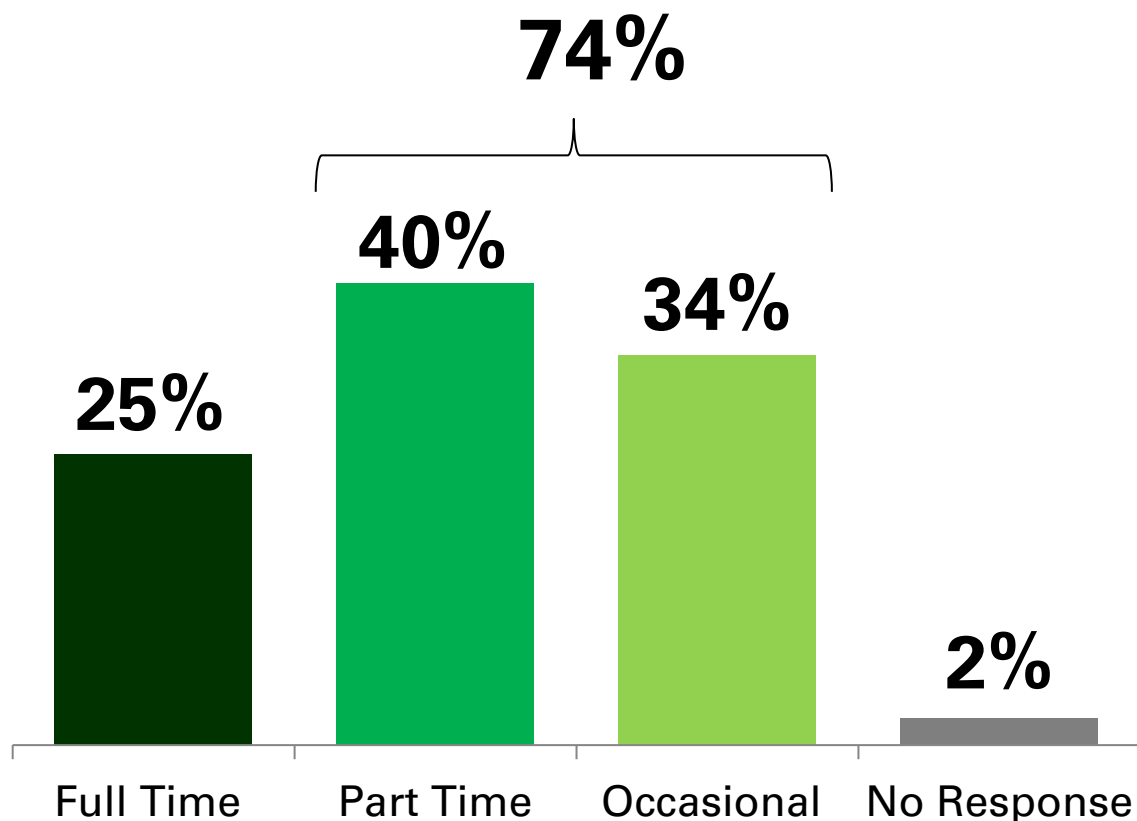


Top Sectors For Other Work	
Hospitality/food service	17%
Healthcare	13%
Education	10%
Entertainment	8%
Financial services	8%
Professional services	8%
Science/Tech services	7%
Construction	5%
Customer service industry	4%
Gov, military, nonprofit	3%
Transportation	3%
Manufacturing/automotive	3%
Active/part-time military	2%
Agriculture	2%

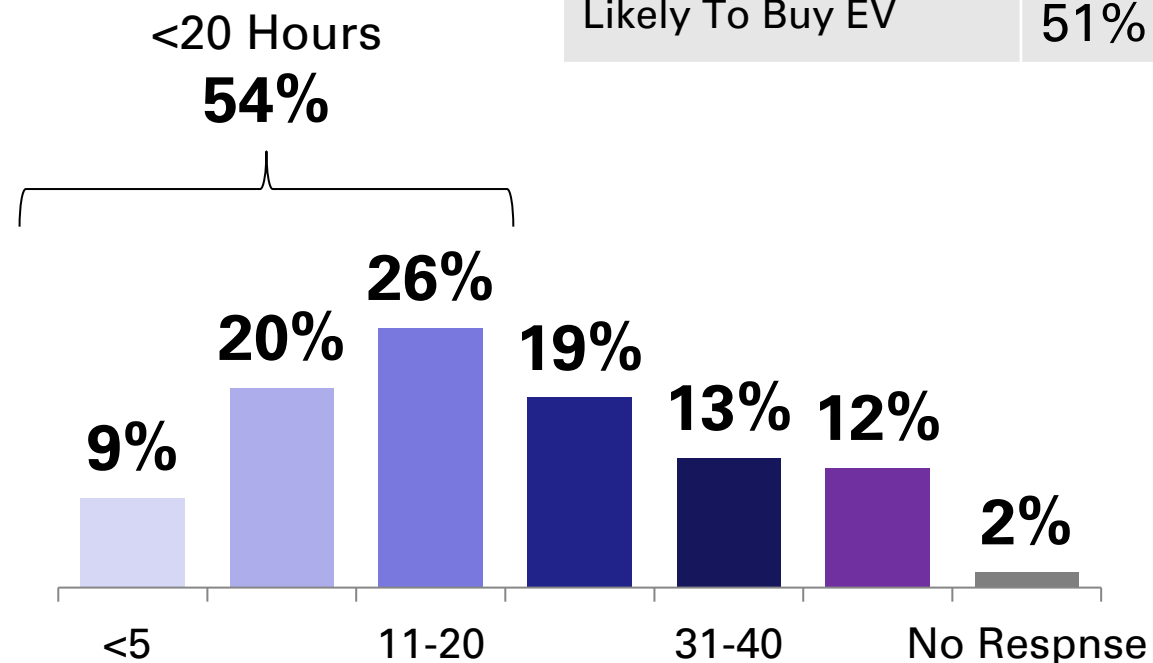
Three-Quarters Drive Part-Time Or Only Occasionally

Majority Say They Spend Less Than 20 Hours Doing App-Based Work

Which Of The Following Best Describes Your Work As An App-Based Driver Or Delivery Person Right Now?



Hours Spent Driving Per Week



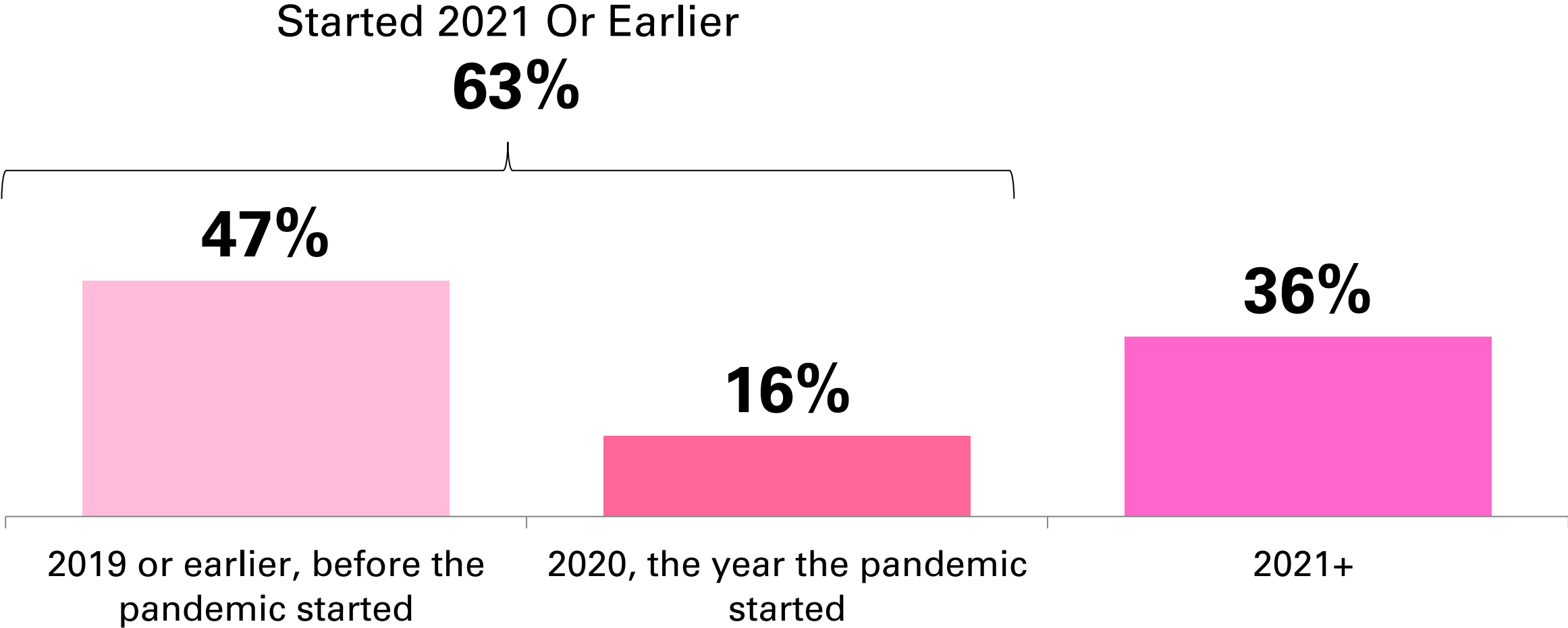
Use of Electric Vehicles

Use EV For App-Work	16%
Likely To Buy EV	51%



Over A Third Started Driving After Prop 22 Passed

What Is Your Best Estimate Of When You First Started Doing Work On An App-Based Platform?



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