June 2020
CALIFORNIA APP-BASED DRIVER SURVEY
The California App-Based Driver survey was an online survey conducted by global independent research firm Edelman Intelligence. The survey interviewed 718 Californian app-based rideshare and food delivery drivers who have driven with any rideshare or food delivery app within the past year. Data was collected between May 19 and June 1, 2020. The margin of error is +/- 3.7 percentage points. The research was commissioned by Uber.

Edelman Intelligence is an expert research firm around the gig economy. Notable gig economy research has included the annual Freelancing in America report and the annual Postmates’ Economic Impact Report.
PROFILE OF CALIFORNIA APP-BASED DRIVERS

**Gender**
- 30% Female
- 67% Male
- 3% Non-binary

**Age**
- 18-22 (Gen Z) - 7%
- 23-38 (Millennials) - 45%
- 39-54 (Gen X) - 32%
- 55+ (Boomers) - 15%

**Race/Ethnicity**
- White - 50%
- Hispanic - 22%
- Asian American - 13%
- African American - 9%
- Other - 6%
- Total Non-white: 50% (n=363)

**Region**
- 22% Bay Area
- 53% SOCAL/LA
- 9% Sacramento Area
- 7% So. Border/San Diego
- 9% Other

**# of Apps They’ve Driven With in the Past Year**
- 1 App: 20%
- 2 Apps: 22%
- 3 Apps: 12%
- 4+ Apps: 46%

**Schedule**
- 84% Drive Fewer Than 40 Hours/Wk
- 16% Drive 40 or More Hours/Wk
More than 7 in 10 app-based drivers in California support the ballot measure that is scheduled to appear on the November ballot which would protect their right to be independent contractors. They report they support the ballot measure because it provides them the flexibility, freedom, and empowerment that allows them to “be in the driver’s seat” of their own lives while also guaranteeing them benefits that make their lives more secure.

The flexibility app-based drivers value as independent contractors is not just a necessity, it’s a deal breaker – 2 in 3 drivers say they would stop driving if this flexibility was compromised.

App-based driving is a side hustle, not a full-time job – more than 5 in 6 drivers have another job, and 3 in 4 drivers say the income they make from driving is supplemental, not primary income.

Driving helps drivers feel empowered, in control of their lives – 78% say driving helps them feel in control of their own lives, and 67% say driving helps them feel empowered.

App-based driving has been a lifeboat to many who have lost jobs due to COVID-19 – 2 in 3 drivers agree driving gave them an opportunity to earn money after losing a job or having their hours cut.

During a time when mental health is top of mind, driving can be a key outlet for mental wellbeing – driving can provide a sense of pride, purpose, and community during a time when many are looking for ways to cope.
APP-BASED DRIVERS WOULD PREFER TO MAINTAIN THE FLEXIBILITY THEY CURRENTLY GET AS INDEPENDENT CONTRACTORS THAN RECEIVE FULL-TIME EMPLOYEE BENEFITS
More than 7 in 10 app-based drivers support the proposed ballot measure that would allow them to maintain their independent contractor status.

Survey respondents were shown the following description of the ballot measure from a TechCrunch article:

“Funded by Uber, Lyft and DoorDash — the measure aims to ensure drivers and couriers can continue to be independent contractors with flexible work hours.

The ballot measure looks to implement an earnings guarantee of at least 120% of minimum wage while on the job, 30 cents per mile for expenses, a healthcare stipend, occupational accident insurance for on-the-job injuries, protection against discrimination and sexual harassment and automobile accident and liability insurance.

This initiative is a direct response to the legalization of AB-5, the gig worker bill that will make it harder for the likes of Uber, Lyft, DoorDash and other gig economy companies to classify their workers as 1099 independent contractors.”

- TechCrunch, October 2019
IN FACT, THE BALLOT MEASURE HAS THE POTENTIAL TO IMPACT VOTER TURNOUT, WITH OVER HALF OF DRIVERS SAYING THE MEASURE MAKES THEM MORE LIKELY TO VOTE IN NOVEMBER

“ I believe this vote is very important for drivers like us. This vote will change the way we will work and will benefit our lives. ”
- Female, Gen Z, Los Angeles

Q21a: What is your main reason for saying you would vote yes on this ballot measure? (n=518) / C10: How does the previously mentioned ballot measure around classification of app-based drivers impact your likelihood to vote in the November 2020 election? <Of those registered to vote> (Total N=718, Bay Area N=156, SoCal/LA N=384, Sacramento Area N=67, White N=358, Non-White N=360)
DRIVERS SUPPORT THE BALLOT MEASURE DUE TO THE FLEXIBILITY, INDEPENDENCE, AND FREEDOM IT PROTECTS

I want the freedom and flexibility to work on my own terms. The “benefits” of employment classification come with restrictions that are the reason that I chose not to be an employee.” – Female, Millennial, Los Angeles

“I have a young child... and as a single parent without help I need to be able to make money when convenient for me...between taking her to school, picking her up, running errands and looking for housing. It gives me the opportunity to earn honest money when I need it right away.” – Female, Millennial, Bay Area

“It’s exactly as the ballot describes, I’d like the flexibility and freedom. It is a "gig" not a job and I really want to supplement my income but be able to dictate when/where I do it.” – Male, Gen X, Bay Area

Q11: You said that app-based driving/delivering makes you feel in control of your own schedule. Can you tell us more about why a flexible schedule is important to you? (n=323) Q14: You said that you prefer to be classified as an [Independent Contractor] – can you tell us a bit more about why you prefer that? (n=683) Q21a: What is your main reason for saying you would vote yes on this ballot measure? (n=518)
FLEXIBILITY IS CRITICAL – IT’S WHY APP-BASED DRIVERS STARTED DRIVING IN THE FIRST PLACE

<table>
<thead>
<tr>
<th>Are satisfied with their work</th>
<th>82%</th>
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<tr>
<td>Feel that app-based driving is the best option for their lifestyle</td>
<td>72%</td>
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9 IN 10 BEGAN APP-BASED DRIVING BECAUSE...

- They needed a job where they could choose when and where to work (88%)
- They needed a work option with a flexible schedule (86%)

This is especially true for caregivers

80% report driving with app-based companies allows them the flexibility that they need as a caregiver

S13: How satisfied are you with your overall experience driving/delivering for app-based companies? (Net: Somewhat satisfied/Very satisfied) / Q10: How much do you agree or disagree with the following statements? (Net: Somewhat agree/Strongly agree) / Q8: How much do you agree or disagree with the following as reasons for why you started driving/delivering for an app-based ride share/food delivery company? (Net: Somewhat agree/Strongly agree) (Total N=718, Caregivers N=421)
AND FLEXIBILITY IS NOT JUST A NECESSITY, IT’S A DEALBREAKER

2 IN 3 DRIVERS WOULD STOP DRIVING IF FLEXIBILITY WAS COMPROMISED

68% report they wouldn’t continue driving if they didn’t have the flexibility they have now and were required to work a fixed shift

64% Bay Area, 69% SoCal/LA, 79% Sacramento Area
70% White, 67% Non-White

Q10: How much do you agree or disagree with the following statements? (Net: Somewhat agree/Strongly agree) (Total N=718, Bay Area N=156, SoCal/LA N=384, Sacramento Area N=67, White N=358, Non-White N=360)
THE FLEXIBILITY ALSO ALLOWS FOR ENRICHMENT

FOR 3 IN 4

The flexibility that app-based driving provides has allowed them to pursue other interests that they couldn't before (74%).

Q10: How much do you agree or disagree with the following statements? (Net: Somewhat agree/Strongly agree) (N=718) / Q11: You said that app-based driving/delivering makes you feel in control of your own schedule. Can you tell us more about why a flexible schedule is important to you? (n=323)

I need a flexible schedule so I can focus on what I would like to do as an entrepreneur.”
– Female, Gen Z, Sacramento Area

“I like to have free time to study and have hobbies and shift my work time to fit my free time and sleep schedule.”
– Male, Gen Z, Los Angeles

58%

SAY THAT APP-BASED DRIVING HAS GIVEN THEM THE TIME AND MONEY THEY NEEDED TO TAKE A BREAK FROM A 9-5 JOB AND MAKE A MAJOR LIFE DECISION
APP-BASED DRIVING IS A SIDE HUSTLE AND NOT A FULL-TIME JOB FOR THE MAJORITY OF DRIVERS, PROVIDING AN OPPORTUNITY TO MAKE SUPPLEMENTAL INCOME
MAJORITY OF APP-BASED DRIVERS DRIVE PART TIME WITH IRREGULAR SCHEDULES

Drivers drive fewer than 40 hours per week (84%)

Drivers have another job (84%)

3 in 4 drivers say their driving schedule changes from week to week (71%)

Half of drivers say they go long stretches of time without driving (47%)

Q1: How many hours a week on average do you spend driving/delivering with these services? Please think about how much you typically drove/delivered before shelter-in-place orders were mandated, how that has changed, and what your plan is for after shelter-in-place orders are lifted. / Q4: Do you have any other source(s) of income? <Other job defined as either: Other gig work, a part-time job, a full-time job, my own small business> / Q9: How much do the following statements describe how you usually drive/deliver for app-based rideshare or food delivery companies in general? (Nets: Describes me somewhat/Describes me completely) Total N=718
APP-BASED DRIVING ALSO PROVIDES AN ESSENTIAL WAY TO EARN SUPPLEMENTAL INCOME

% USING DRIVING FOR SUPPLEMENTAL INCOME VS. PRIMARY SOURCE OF INCOME

74% ADDITIONAL INCOME
26% PRIMARY INCOME

Additional: 71% Bay Area, 74% SoCal/LA, 83% Sac. Area
77% White, 71% Non-White

At the end of the day, it's about being able to supplement my income. For all their faults, ride share apps have allowed me to work for extra money at the time when I need it most desperately."
- Male, Gen X, Bay Area

“I am a stay at home/work from home mother of 5 children. My week is already hectic as it is with extra curricular activities… I am a Mom-On-The-Go and I needed an extra source of income to try to supplement my income so I needed a job that would be extra flexible that I could slip into between activity shifts as well.
- Female, Millennial, Los Angeles

Q3: Which is closer to how you view the income you earn from app-based driving/delivering? (N=718) / Q11: You said that app-based driving/delivering makes you feel in control of your own schedule. Can you tell us more about why a flexible schedule is important to you? (Total N=718, Bay Area N=156, SoCal/LA N=384, Sacramento Area N=67, White N=358, Non-White N=360)
THE SUPPLEMENTAL INCOME HAS ALLOWED DRIVERS TO TAKE CONTROL OVER THEIR LIVES

- 78% say driving helps them feel in control of their own future.
- 78% feel they would not be able to live their lives the way they want to without the income from driving.
- 75% say driving with app-based companies has improved their lives.
- 67% say driving helps them feel empowered.

Q7a: Thinking about your app-based driving/delivering, how well do each of the following describe how it makes you feel on a typical day? (Nets: Describes me somewhat/Describes me completely)

Q12: How much do you agree or disagree with the following statements? If I didn’t have driving for rideshare/delivery as an option for work, I wouldn’t be able to... (Nets: Somewhat agree/Strongly agree)

Q10: How much do you agree or disagree with the following statements? (Nets: Somewhat agree/Strongly agree) (N=718)
APP-BASED DRIVING HAS BEEN A LIFEBOAT TO MANY WHO HAVE LOST JOBS DUE TO COVID-19

1 IN 4
DRIVERS LOST A PART-TIME OR FULL-TIME JOB DUE TO COVID-19
(70% had a part-/full-time job prior to COVID-19 vs. 45% during)

2 IN 3
AGREE APP-BASED DRIVING GAVE THEM AN OPPORTUNITY TO EARN MONEY AFTER LOSING A JOB OR HOURS
(67%)

SOURCE OF INCOME FROM APP-BASED DRIVING
PRIOR VS. DURING COVID-19

PRIOR TO COVID-19

PRIMARY
26%

ADDITIONAL
74%

DURING COVID-19

PRIMARY
48%

ADDITIONAL
52%

Q4: Do you have any other source(s) of income? / Q10: How much do you agree or disagree with the following statements? (Nets: Somewhat agree/Strongly agree) / Q3: Which is closer to how you view the income you earn from app-based driving/delivering? (N=718)
### APP-BASED DRIVING ALSO ACTS AS INSURANCE AGAINST CRISSES

**Without income from app-based driving, drivers wouldn’t be able to…**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Put money away for a rainy day</td>
<td>76%</td>
</tr>
<tr>
<td>Provide for themselves and their family</td>
<td>73%</td>
</tr>
<tr>
<td>Pay their bills</td>
<td>73%</td>
</tr>
<tr>
<td>Pay rent/mortgage</td>
<td>67%</td>
</tr>
<tr>
<td>Put food on the table</td>
<td>65%</td>
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</tbody>
</table>

**While COVID-19 has impacted drivers’ anxiety and stress, it’s also provided some comfort as a way to provide for themselves and their family**

- FEEL MORE STRESSED, ANXIOUS DRIVING DURING COVID-19 (50%, 48%)
- FEEL THANKFUL TO HAVE DRIVING AS AN OPPORTUNITY TO PROVIDE FOR THEMSELVES & FAMILIES (87%)

Q12: How much do you agree or disagree with the following statements? If I didn’t have driving for rideshare/delivery as an option for work, I wouldn’t be able to… (Nets: Somewhat agree/Strongly agree) (N=718) / Q7b: Looking at the same descriptions, please indicate how you feel they currently describe you given your experience and situation with app-based driving/delivering during COVID-19. (n=574) / Q7a: Thinking about your app-based driving/delivering, how well do each of the following describe how it makes you feel on a typical day? (Nets: Describes me somewhat/Describes me completely) (N=718)
DURING A TIME WHEN MENTAL HEALTH IS TOP OF MIND, DRIVING CAN BE A KEY OUTLET FOR MENTAL WELLBEING
Driving can provide a sense of pride, purpose, and community during a time when many are looking for ways to cope.

App-based driving helps drivers feel...

83% Proud to be providing an essential service during this time
82% Like they’re a productive member of society
76% Connected to other people
72% Like they have a purpose in life

Q10: How much do you agree or disagree with the following statements? (Nets: Somewhat agree/Strongly agree) / Q7a: Thinking about your app-based driving/delivering, how well do each of the following describe how it makes you feel on a typical day? (Nets: Describes me somewhat/Describes me completely) (N=718)
DRIVING ALLOWS DRIVERS TO MAKE MORE TIME FOR THE PEOPLE AND THINGS THAT MATTER MOST TO THEM

WITHOUT INCOME FROM APP-BASED DRIVING, DRIVERS WOULDN’T BE ABLE TO...

PURSUE THEIR HOBBIES/INTERESTS OUTSIDE OF WORK

73%

GO OUT AND DO FUN THINGS WITH FRIENDS AND FAMILY

71%

SPEND MORE QUALITY TIME WITH THEIR FAMILY

68%

Q12: How much do you agree or disagree with the following statements? If I didn’t have driving for rideshare/delivery as an option for work, I wouldn’t be able to … (Nets: Somewhat agree/Strongly agree) / Q8: How much do you agree or disagree with the following as reasons for why you started driving/delivering for an app-based rideshare/food delivery company? (Nets: Somewhat agree/Strongly agree) (Total N=718, Bay Area N=156, SoCal/LA N=384, Sacramento Area N=67, White N=358, Non-White N=360)
THANKS

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