MORNING CONSULT®

THE APP-BASED ECONOMY

Flex Association

APRIL 2023

KEY FINDINGS

1. App-based earners *overwhelmingly express* (75%) they *prefer to remain independent contractors*.

2. Most app-based earners spend *10 or less hours* during a typical week earning income on app-based platforms. Additionally, most app-based earners report *less than 25% of their personal income* comes from working on app-based platforms.

3. Nearly all app-based earners (85%) say the ability to earn income on app-based platforms has been *helpful for dealing with inflation*.

4. The majority of app-based earners report using *multiple apps during a work period*, highlighting the demand for app-based earners and the potential to maximize earnings.

5. The majority of adults across the U.S. and in each state have used an app-based platform as a customer with *more than 2 in 3 U.S. adults* saying they use app-based platforms as a customer *at least once a month*.

KEY FINDINGS

APP-BASED EARNERS – USAGE & PERSPECTIVES

- Two-thirds of current app-based earners (64%) spend 15 or less hours during a typical week earning income on app-based platforms.
- 47% of app-based earners receive less than 25% of their personal income from app-based platforms.
- 85% of app-based earners say earning income has been helpful in dealing with inflation.
- 81% of app-based earners report having used multiple apps during a given work period.

APP-BASED CONSUMERS – PARENTS

- 85% of parents with children under 18 have used app-based platforms as a customer (compared to 66% of adults who are not parents with children under 18).
- Adults are more than 2.5x more likely to use app-based platforms 6-15x a month if they have children under 18.
- 79% of parents say app-based platforms are valuable to their daily lives.

APP-BASED CONSUMERS – COMMUNITIES OF COLOR

- 81% of Hispanic and 75% of Black adults have used app-based platforms as customers (compared to 70% of white adults).
- 75% of Hispanic and 69% of Black adults say app-based platforms are valuable to their daily life (compared to 62% of white adults).

APP-BASED PLATFORMS – VETERANS

- One out of every 7 app-based earners is in a military household.
- 66% of military households have used app-based platforms as customers.
- 84% of current app-based earners in a military household say earning income on app-based platforms has been helpful for dealing with inflation.

APP-BASED PLATFORMS – RURAL IMPACT

- Majority of current app-based earners are in rural/suburban areas (52%).
- 30% of adults in rural areas have earned income on app-based platforms.
- 6/10 adults in rural areas have used app-based platforms as a customer.

APP-BASED EARNERS – INCOME & EDUCATION LEVELS

- 35% of adults that didn't attend/graduate college have earned income on app platforms, compared to 34% of adults with a bachelors degree and 42% of adults with a post-grad education.

APP-BASED EARNERS – CLASSIFICATION PREFERENCES

- App-based earners overwhelmingly (75%) express they prefer to remain independent contractors.
- 2/3 rural app-based earners support maintaining their current classification as independent contractors.
- 76% of white, 73% of Hispanic, and 72% of Black adults support maintaining the current classification.

METHODOLOGY

This nationwide poll was conducted online from April 5-12, 2023 among a sample of 10,011 adults. State-level results are estimated by a multi-level regression and post-stratification (MRP) model weighted by age, race/ethnicity, gender, and educational attainment within each state. Results from the full survey have a margin of error of plus or minus 1 percentage point.

The data were then subset to Adults Who Have Ever Been an App-Based Worker as well as Adults Who Are Currently App-Based Workers. The subsets of data represent 3,578 Adults Who Have Ever Been an App-Based Worker and 2,246 Adults Who Are Currently App-Based Workers. All Adults Who Are Currently App-Based Workers are included as part of the sample of Adults Who Have Ever Been an App-Based Worker. Results from both subsets have a margin of error of plus or minus 2 percentage points.
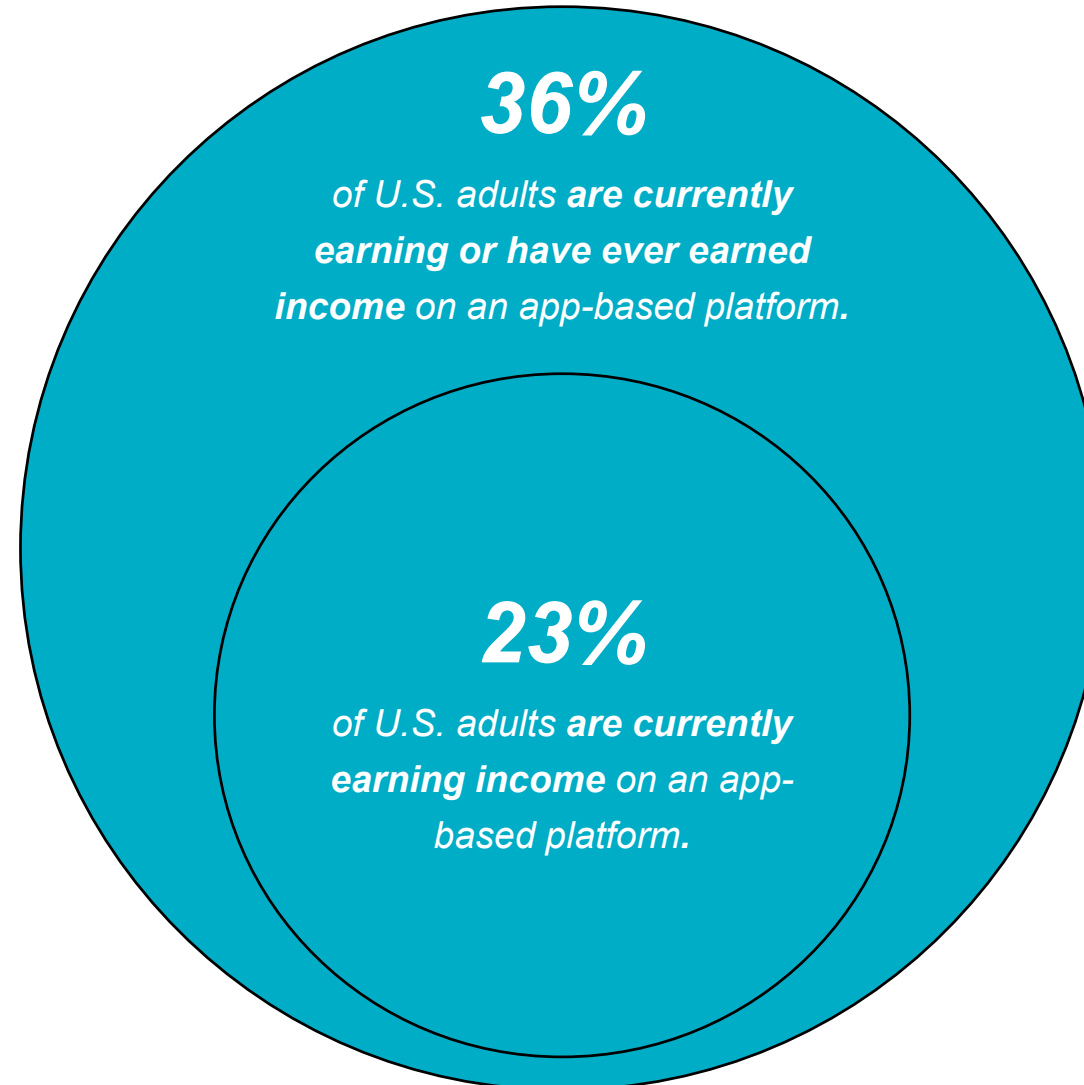
Earning income an app-based platforms.

36%

*of U.S. adults **are currently earning or have ever earned income** on an app-based platform.*
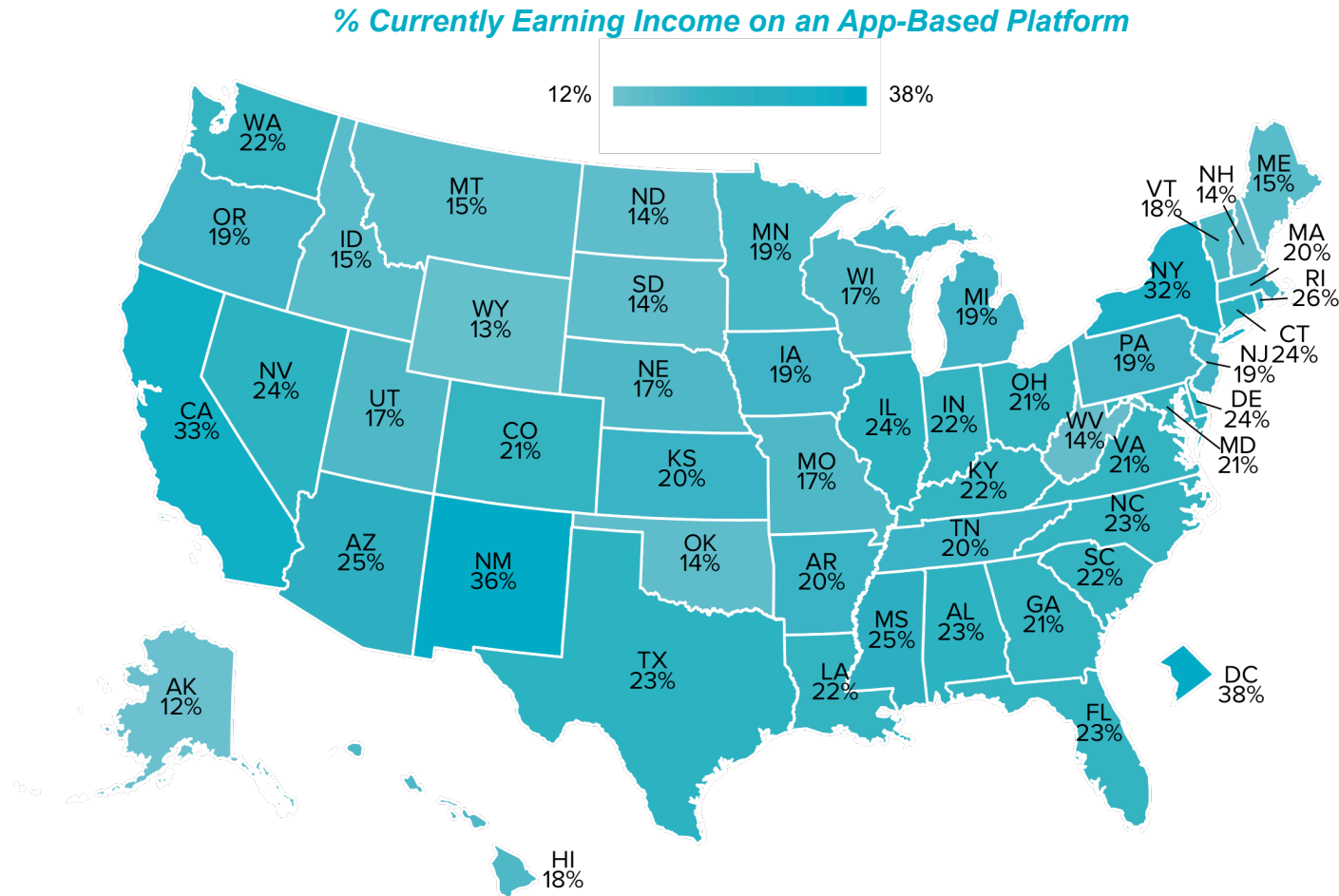
23%

*of U.S. adults **are currently earning income** on an app-based platform.*

*Calculated based on aggregations of answer options, all adults who are currently app-based workers are included as part of the sample of adults who have ever been an app-based worker.

Are you currently earning any amount of income doing any service or task on an app-based platform? This includes earning income on an app-based platform on a full-time or part-time basis.

% Currently Earning Income on an App-Based Platform

12% ▬▬▬▬▬▬▬ 38%

State	%
WA	22%
OR	19%
MT	15%
ID	15%
ND	14%
MN	19%
WI	17%
MI	19%
VT	18%
NH	14%
ME	15%
MA	20%
NY	32%
RI	26%
NV	24%
CA	33%
UT	17%
WY	13%
SD	14%
IA	19%
NE	17%
IL	24%
IN	22%
OH	21%
PA	19%
CT	24%
NJ	19%
DE	24%
MD	21%
WV	14%
VA	21%
CO	21%
KS	20%
MO	17%
KY	22%
NC	23%
AZ	25%
NM	36%
OK	14%
AR	20%
TN	20%
SC	22%
MS	25%
AL	23%
GA	21%
DC	38%
TX	23%
LA	22%
FL	23%
AK	12%
HI	18%

State-level results are estimated by a multi-level regression and post-stratification (MRP) model weighted by age, race/ethnicity, gender, and educational attainment within each state.

How recently, if ever, have you used an app-based platform **as a customer** for any service?

71%

of U.S. adults ***have ever used an app-based platform*** *as a customer.*

66%

of U.S. adults ***have used an app-based platform*** *as a* ***customer in the past 12 months****.*

*71% calculated based on 29% of adults saying they have never used an app-based platform as a customer, 66% calculated based on aggregations of answer options and does not include all response options.

How recently, if ever, have you used an app-based platform **as a customer** for any service?

■ *Total Have Ever Used App-Based Platforms as a Customer*

State	%
AK	73%
AL	65%
AR	63%
AZ	73%
CA	77%
CO	74%
CT	71%
DC	85%
DE	71%
FL	73%
GA	74%
HI	69%
IA	65%
ID	66%
IL	73%
IN	66%
KS	69%
KY	65%
LA	68%
MA	73%
MD	75%
ME	67%
MI	67%
MN	68%
MS	70%

State	%
MO	66%
MT	65%
NC	71%
ND	64%
NE	67%
NH	68%
NJ	73%
NM	74%
NV	74%
NY	74%
OH	68%
OK	69%
OR	71%
PA	68%
RI	71%
SC	68%
SD	64%
TN	67%
TX	76%
UT	71%
VA	74%
VT	69%
WA	73%
WI	67%
WV	59%
WY	66%

State-level results are estimated by a multi-level regression and post-stratification (MRP) model weighted by age, race/ethnicity, gender, and educational attainment within each state.

During a typical month, how many times do you use app-based platforms **as a customer** for any service?

69% *of U.S. adults use app-based platforms as a customer* **at least once a month***.*

21% of U.S. adults use app-based platforms as a customer **more than 5 times a month***.*

9% *of U.S. adults use app-based platforms as a customer more* **than 10 times a month***.*

*Calculated based on aggregations of answer options.

How valuable, if at all, do you find using app-based platforms **as a customer** is to your daily life?

63%

Very Valuable or Somewhat Valuable
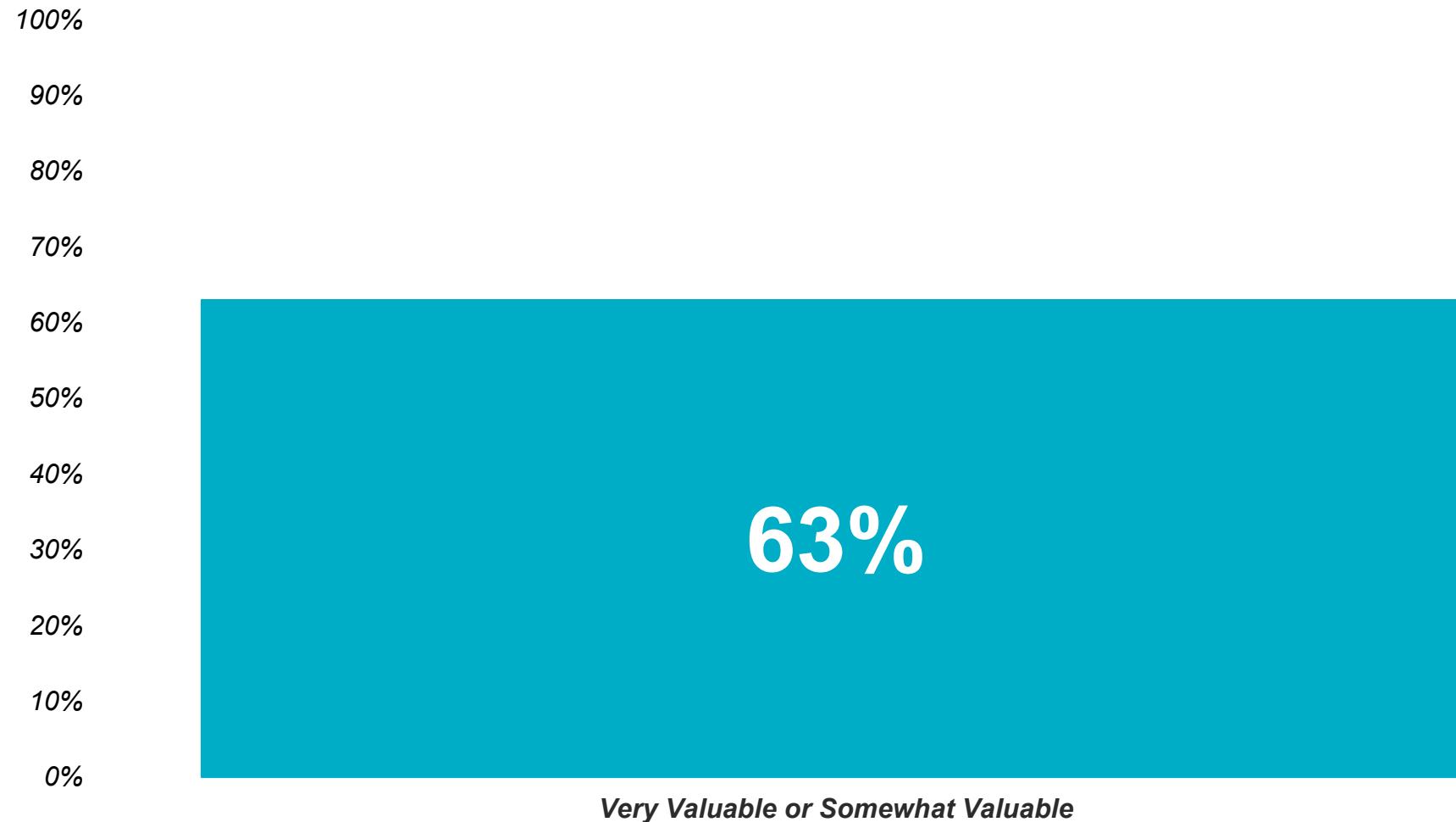
Calculated based on aggregations of answer options, does not include all response options.

Some policymakers have proposed legislation that could change the classification of many independent workers, which could potentially lead to higher costs and lower availability for app-based services. Would you be more likely or less likely to vote for a politician if they supported this type of legislation?

2:1

*By a **more than 2:1 margin**, U.S. adults are less likely to support politicians that reclassify independent workers.*

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Some policymakers have proposed legislation that could change the classification of many independent workers, which could potentially lead to higher costs and lower availability for app-based services. Would you be more likely or less likely to vote for a politician if they supported this type of legislation?

Vote Margin for Politicians Supporting Legislation That Could Change Classification of Independent Workers

*Calculated as % Less Likely to Vote ÷ % More Likely to Vote
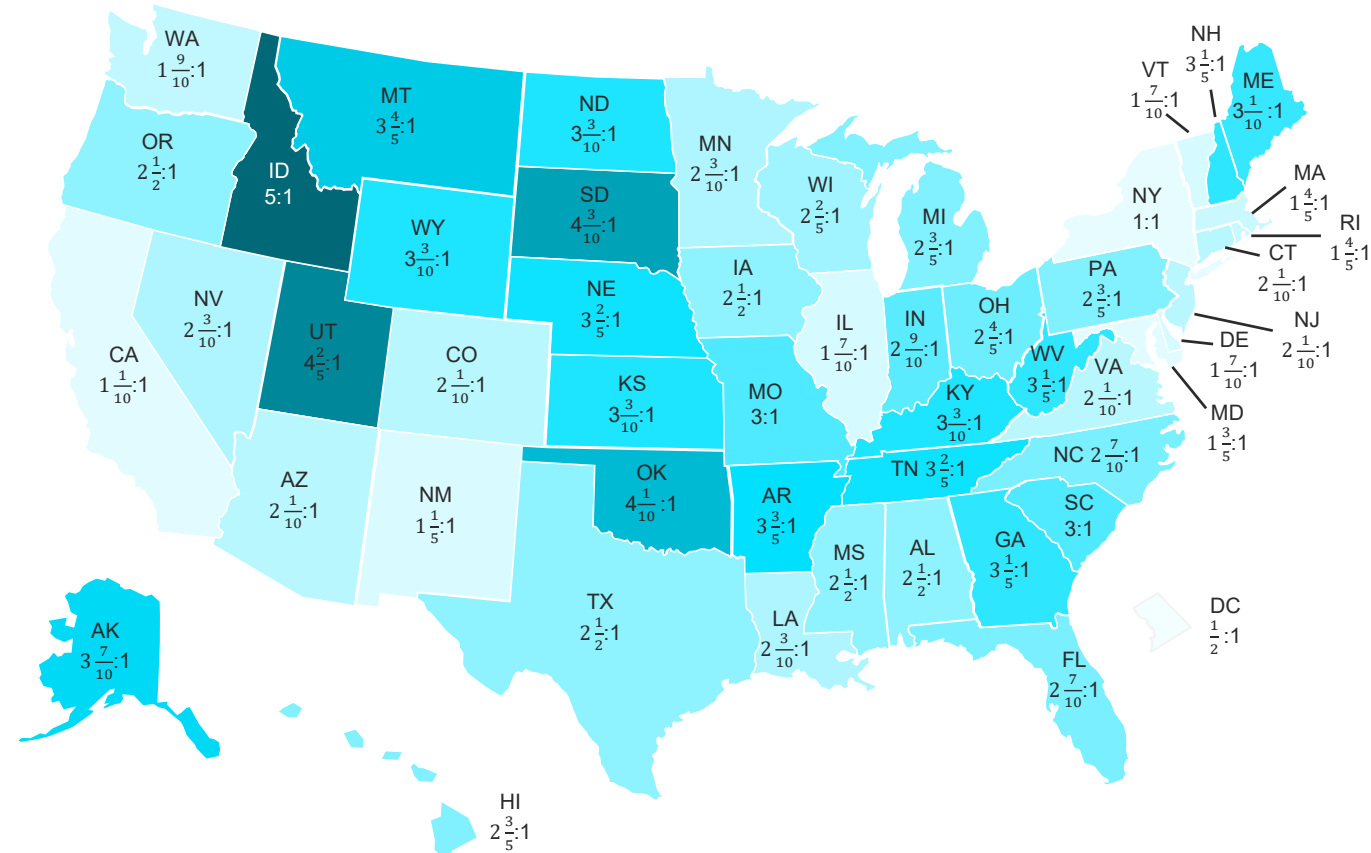
WA $1\frac{9}{10}$:1
OR $2\frac{1}{2}$:1
ID 5:1
MT $3\frac{4}{5}$:1
ND $3\frac{3}{10}$:1
MN $2\frac{3}{10}$:1
NH $3\frac{1}{5}$:1
VT $1\frac{7}{10}$:1
ME $3\frac{1}{10}$:1
SD $4\frac{3}{10}$:1
WI $2\frac{2}{5}$:1
NY 1:1
MA $1\frac{4}{5}$:1
WY $3\frac{3}{10}$:1
MI $2\frac{3}{5}$:1
RI $1\frac{4}{5}$:1
NV $2\frac{3}{10}$:1
IA $2\frac{1}{2}$:1
PA $2\frac{3}{5}$:1
CT $2\frac{1}{10}$:1
NE $3\frac{2}{5}$:1
IL $1\frac{7}{10}$:1
IN $2\frac{9}{10}$:1
OH $2\frac{4}{5}$:1
NJ $2\frac{1}{10}$:1
CA $1\frac{1}{10}$:1
UT $4\frac{2}{5}$:1
CO $2\frac{1}{10}$:1
WV $3\frac{1}{5}$:1
DE $1\frac{7}{10}$:1
KS $3\frac{3}{10}$:1
MO 3:1
KY $3\frac{3}{10}$:1
VA $2\frac{1}{10}$:1
MD $1\frac{3}{5}$:1
AZ $2\frac{1}{10}$:1
NM $1\frac{1}{5}$:1
OK $4\frac{1}{10}$:1
AR $3\frac{3}{5}$:1
TN $3\frac{2}{5}$:1
NC $2\frac{7}{10}$:1
SC 3:1
MS $2\frac{1}{2}$:1
AL $2\frac{1}{2}$:1
GA $3\frac{1}{5}$:1
DC $\frac{1}{2}$:1
TX $2\frac{1}{2}$:1
LA $2\frac{3}{10}$:1
FL $2\frac{7}{10}$:1
AK $3\frac{7}{10}$:1
HI $2\frac{3}{5}$:1

State-level results are estimated by a multi-level regression and post-stratification (MRP) model weighted by age, race/ethnicity, gender, and educational attainment within each state.

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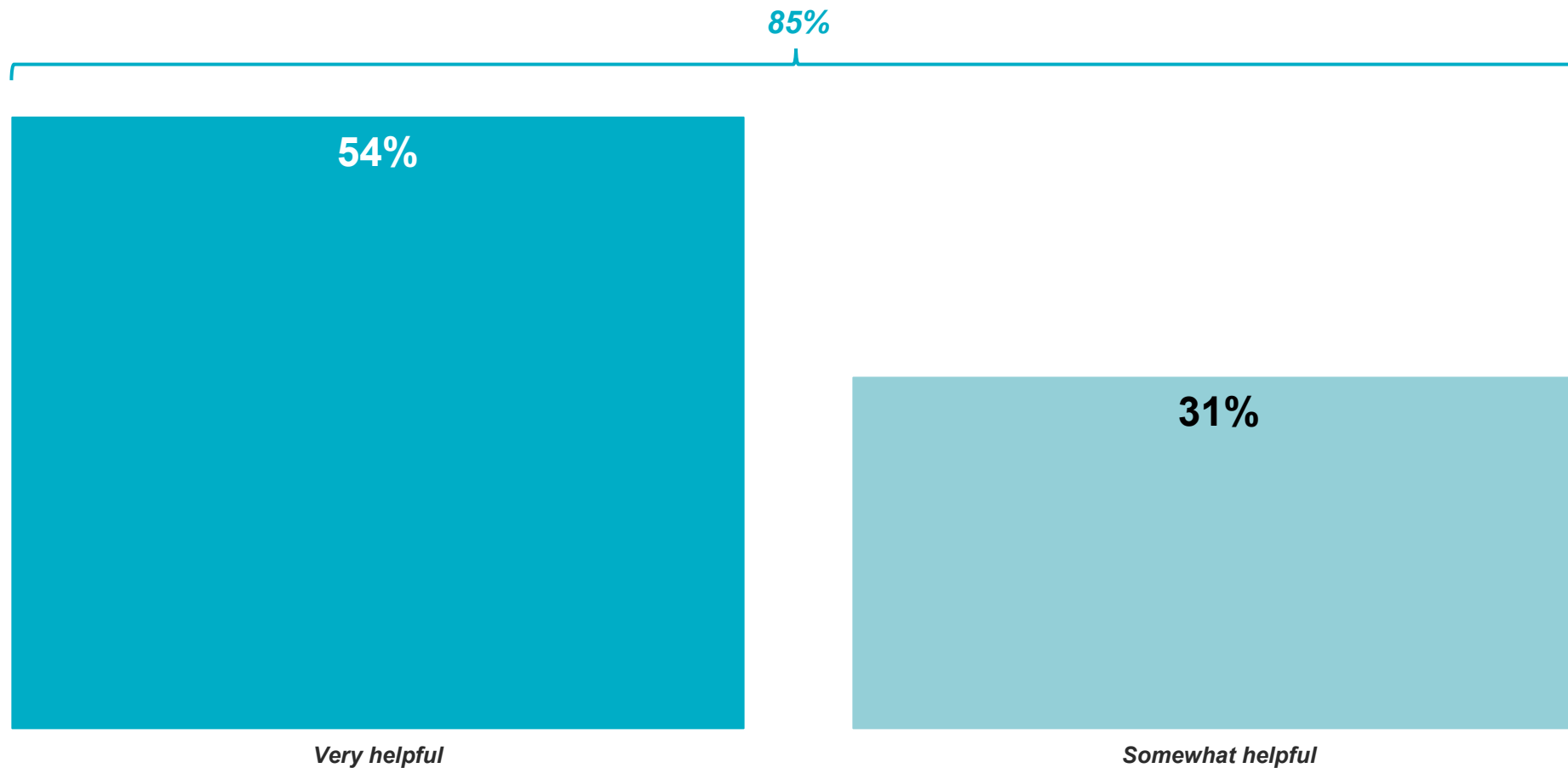
During a typical week, how many hours do you currently or did you previously earn income on app-based platforms? This does NOT include any time spent using app-based platforms as a consumer (i.e., ordering rideshares or food to be delivered to you).
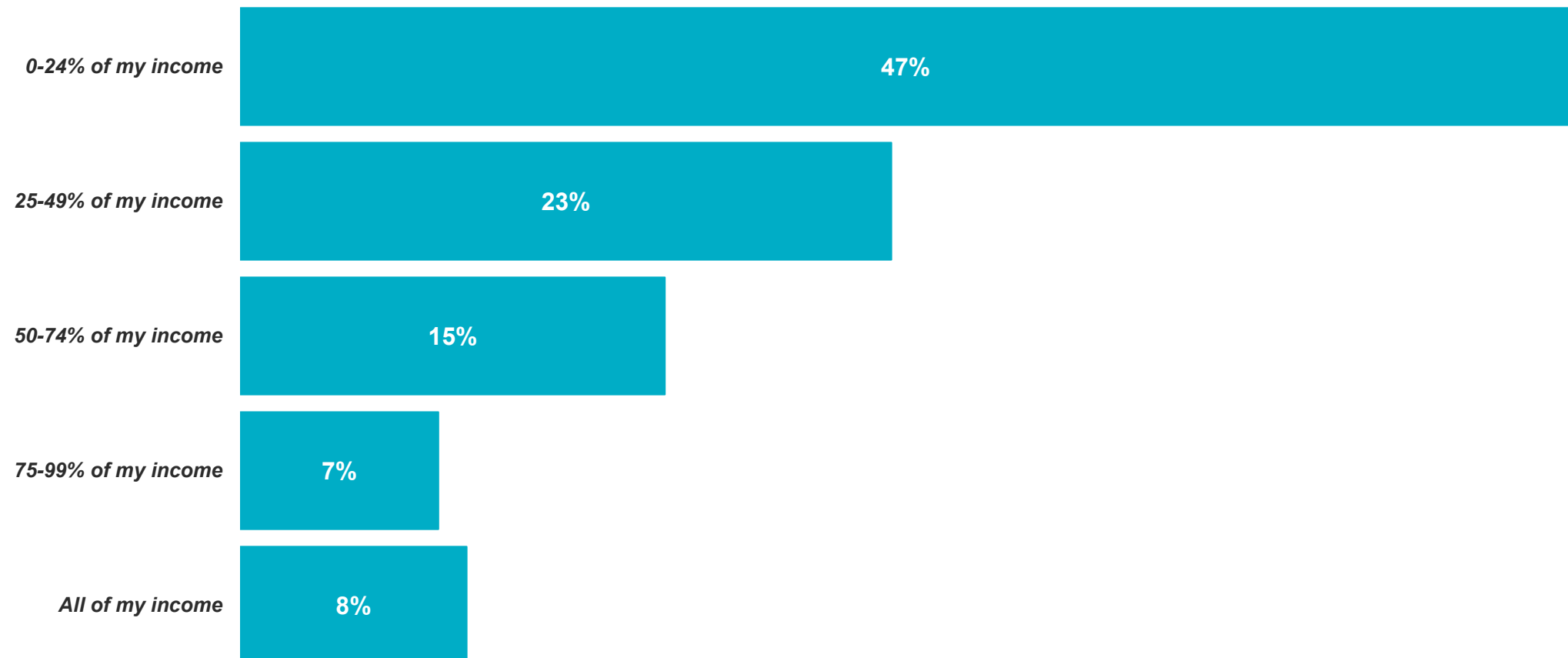
Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%

20 or less hours per week

77%

More than 20 hours per week

23%
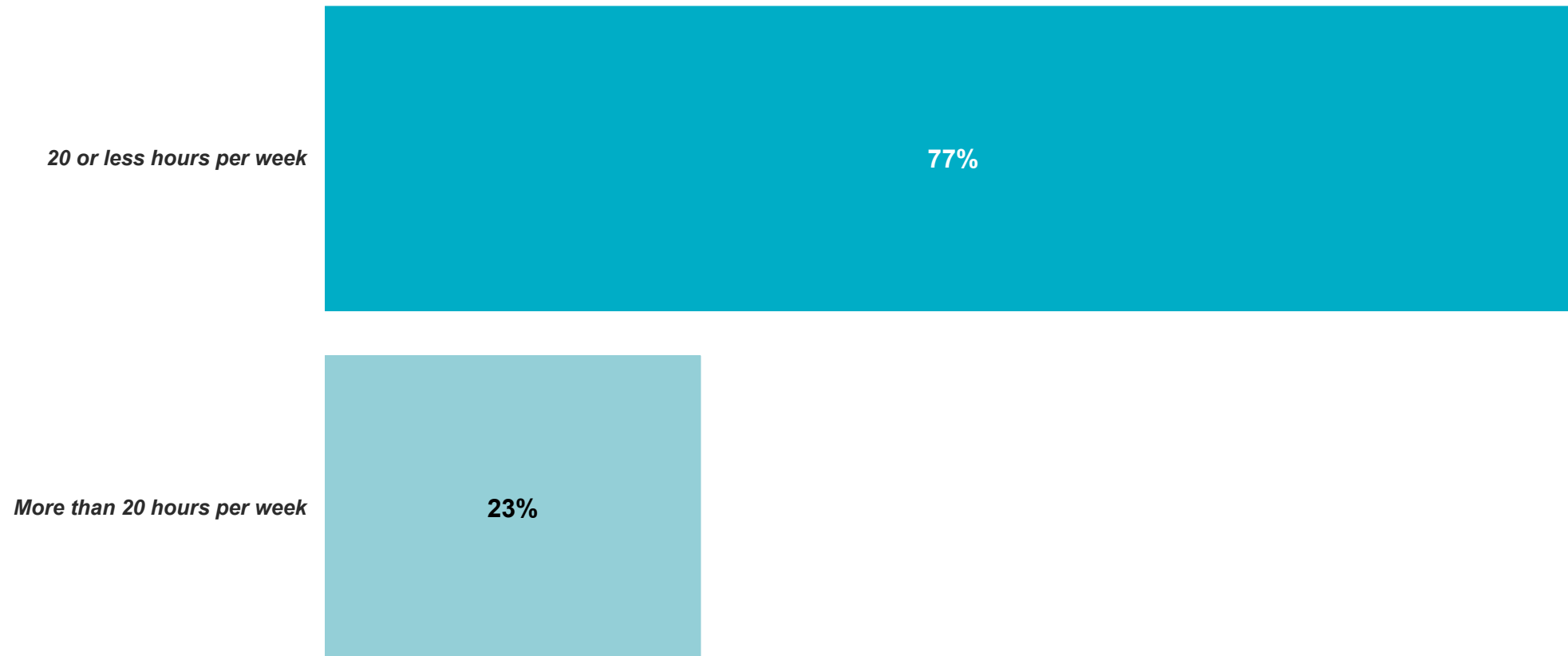
Calculated based on aggregations of answer options and does not include all response options.

Approximately what percentage of your personal income currently comes from or previously came from working on app-based platforms? This refers to your personal income level, NOT the aggregated income of everyone in your household.

Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%

Income Category	Percentage
0-24% of my income	47%
25-49% of my income	23%
50-74% of my income	15%
75-99% of my income	7%
All of my income	8%

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Thinking about your work status, are you currently also a W-2 employee, either through hourly wage or salary on a full-time or part-time basis, in addition to any app-based work you perform? You may select more than one option if applicable.

Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%

69%

33%

Full-Time or Part-Time W-2 Worker in Addition to App-Based Work

Not a W-2 Worker in Addition to App-Based Work

*Calculated based on aggregations of answer options, respondents were able to select multiple options, so data adds to over 100%.
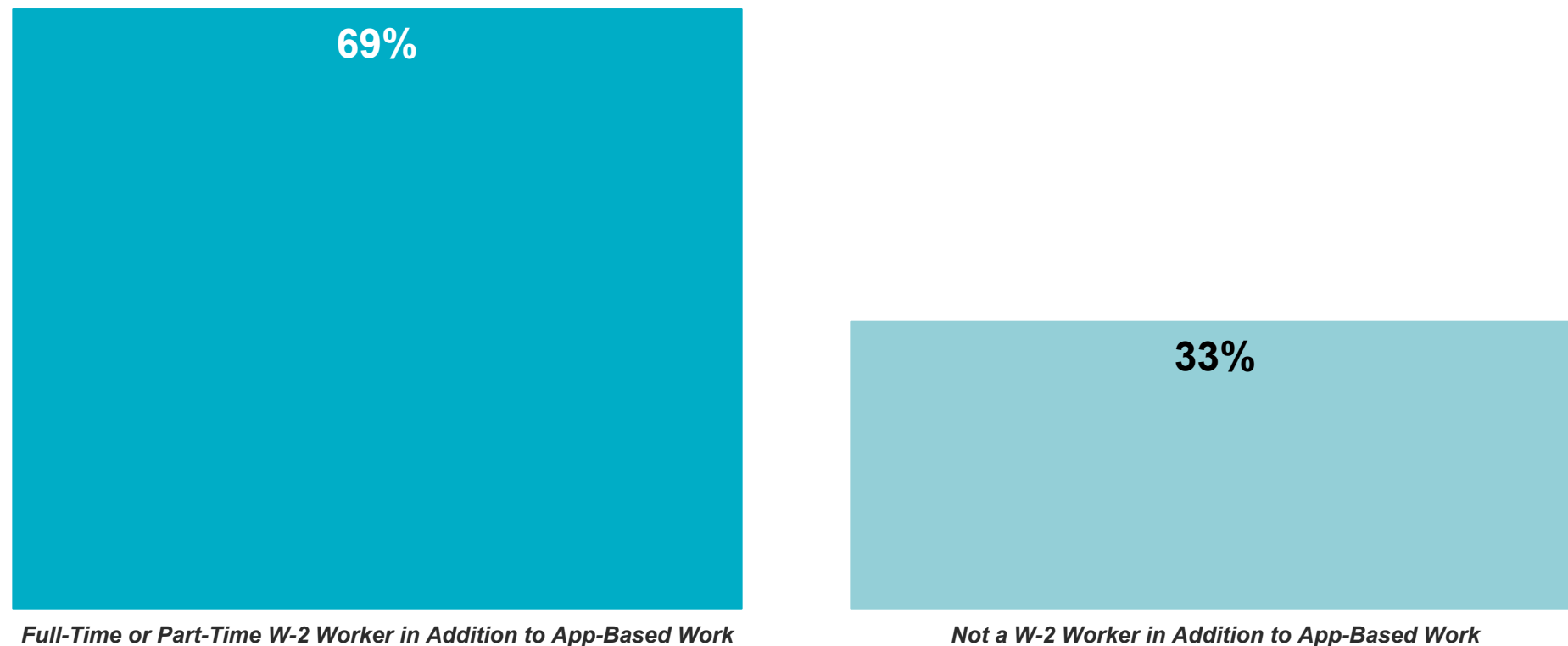
APP-BASED EARNERS

Are you, yourself, now covered by any form of health insurance or health plan or do you not have health coverage at this time?

Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%

Covered by a Form of Health Insurance or Health Plan

88%

Not Covered by a Form of Health Insurance or Health Plan

12%
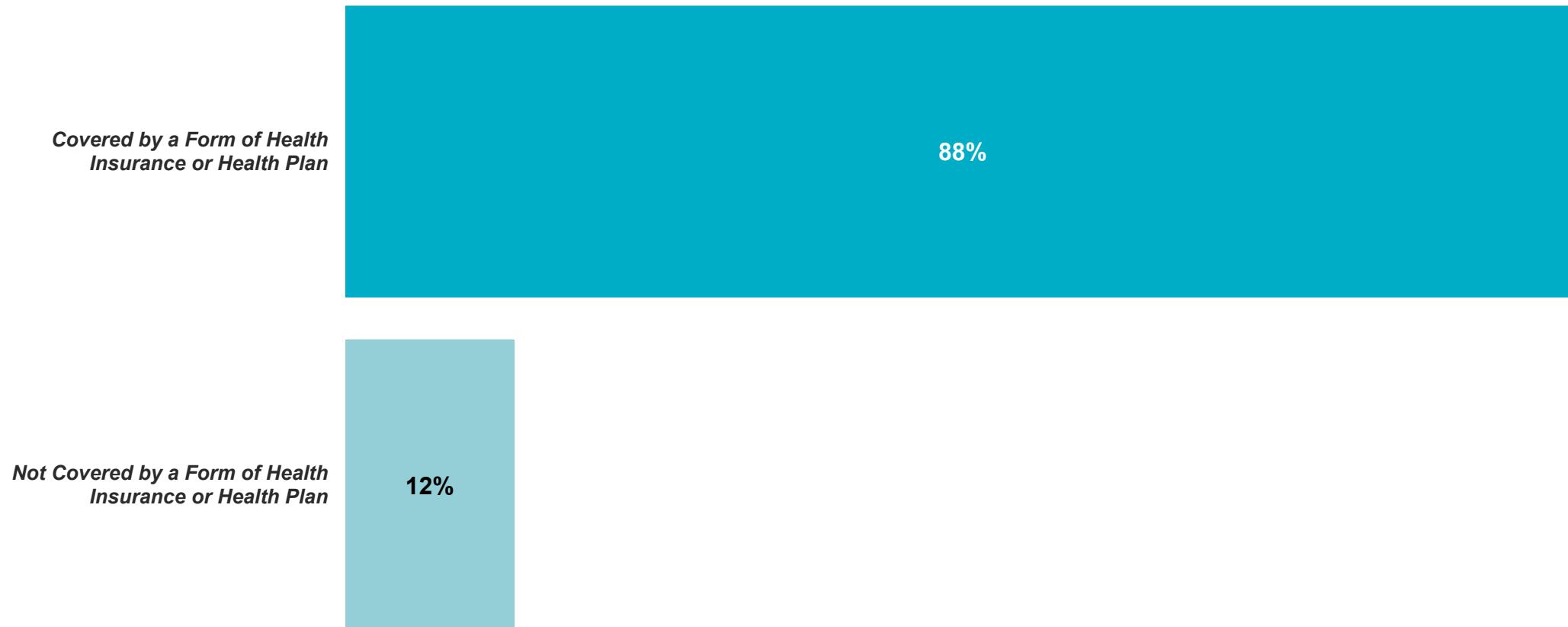
How often, if at all, do you currently or did you previously earn income on two or more app-based platforms during a work period?

Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%

Have Ever Used More Than One App-Based Platform During a Work Period

81%

Never Used More Than One App-Based Platform During a Work Period

19%
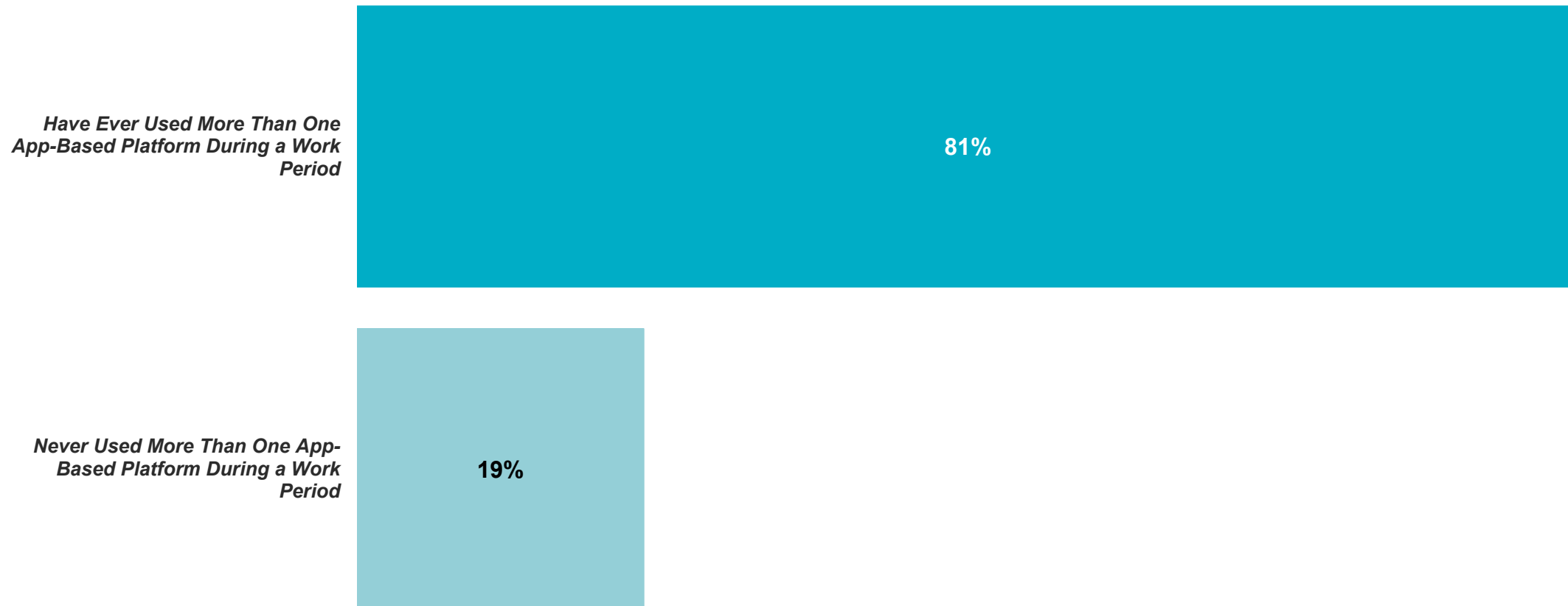
Calculated based on aggregations of answer options.

As you may know, workers who earn income on app-based platforms are currently classified as independent contractors. Do you support or oppose maintaining the current classification of app-based platform workers as independent contractors?

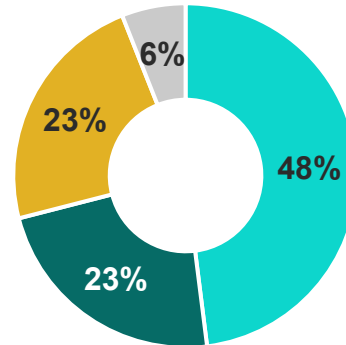*Currently Earning Income on App-Based Platform, N = 2,246, MOE = +/-2%*

Category	Percentage
Strongly support	48%
Somewhat support	27%
Somewhat oppose	7%
Strongly oppose	6%
Don't know/No opinion	12%

75%
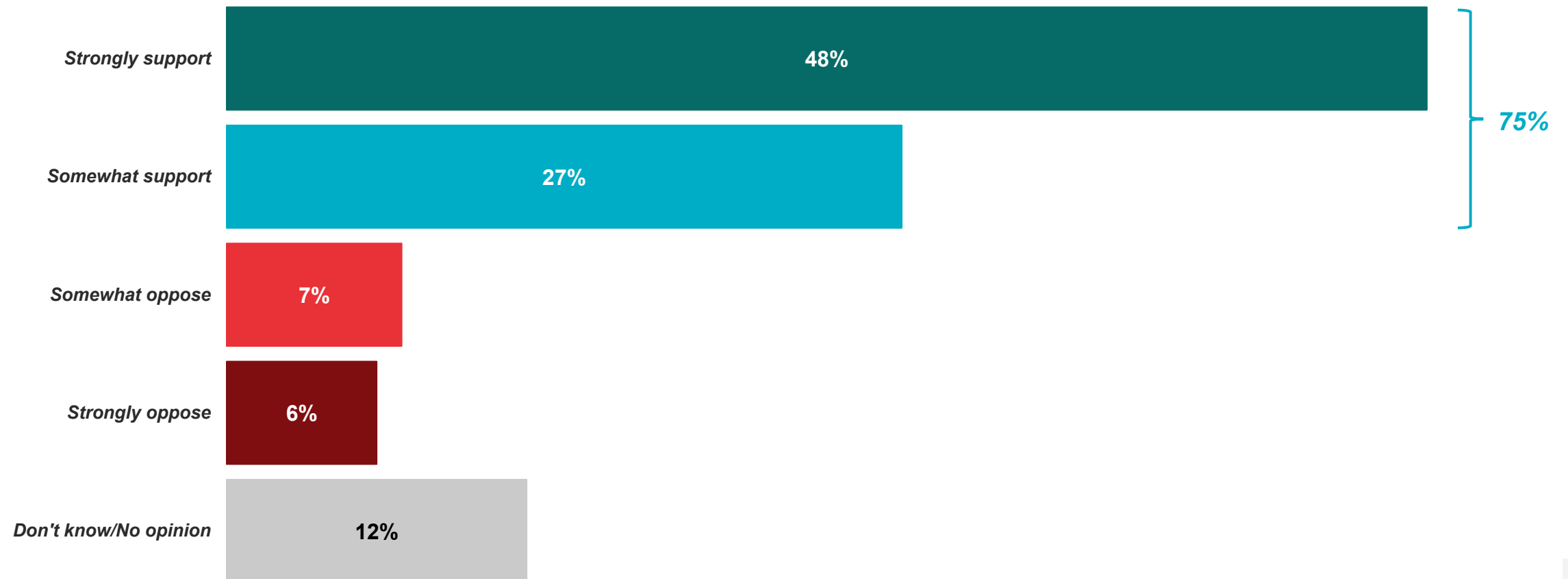
DEMOGRAPHICS

DEMOGRAPHICS

Currently App-Based Workers (*N = 2,246*)

GENDER
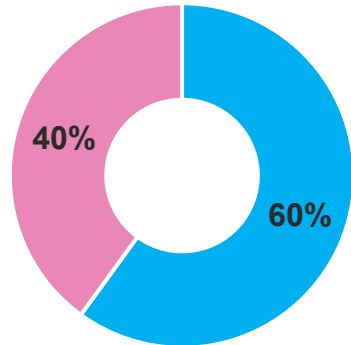
- Male 60%
- Female 40%

AGE

- 18-34 48%
- 35-44 23%
- 45-64 23%
- 65+ 6%

*ETHNICITY

- White 76%
- Hispanic 24%
- Black 15%
- Other 9%
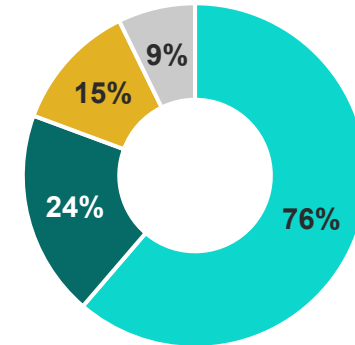
MILITARY HOUSEHOLD
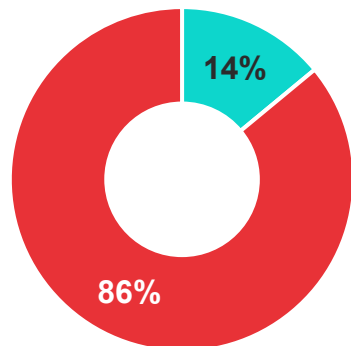
- Military HH: Yes 14%
- Military HH: No 86%

COMMUNITY TYPE

- Urban 48%
- Rural or Suburban 52%
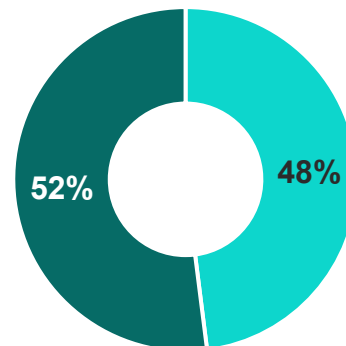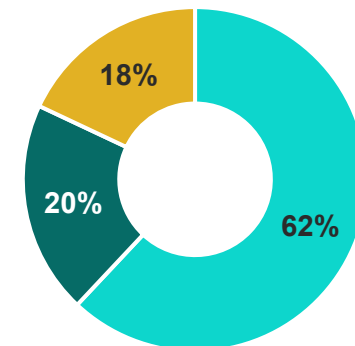
EDUCATION

- < College 62%
- Bachelors degree 20%
- Post-grad 18%

*Ethnicity adds to over 100% as respondents can select multiple ethnicities.

*The data was weighted to adults by age, race/ethnicity, gender, and educational attainment and then subset to Adults Who Are Currently App-Based Workers, MOE = +/-2.