

 MORNING CONSULT

# 2026 State of The App-Based Economy

National & State-Level Survey

— JUNE 2026

# Executive Summary

**Three years after Flex's first national survey of the app-based economy, the 2026 survey shows an app-based economy that is larger, more broadly distributed, and more deeply woven into American economic life. It is also more politically durable than it was three years ago, with consensus holding across party and demographic lines.**

The scale of consumer adoption tells the story. Seven in ten U.S. adults have used an app-based platform, and one in four now use these services more than five times a month. As platforms expand into categories like prescription delivery, same-day retail, and rideshare in suburban markets, they are solving real, recurring problems. Today, two-thirds of adults say these services are valuable to their daily lives, up from 63% in 2023.

The workforce behind these services has grown in step. Nearly three in ten U.S. adults now earn income on a platform, with the fastest growth in states that previously lagged the national average. The work remains overwhelmingly part-time and supplemental, yet its financial value has proven durable: 82% of current earners say platform income has been helpful in dealing with inflation, a finding that has held across very different economic conditions. Workers continue to support independent contractor classification by a 4-to-1 margin across party lines, racial and ethnic groups, and income brackets, and U.S. adults remain nearly 2-to-1 more likely to penalize than reward politicians who force reclassification.

# Key Takeaways

- 1** **Consumer adoption of app-based services is universal, frequent, and concentrated in the same metros that matter most economically and politically.** 72% of U.S. adults have used an app-based platform as a customer (51% in the past three months alone).
- 2** **The app-based workforce is broader than it has ever been, and it remains overwhelmingly part-time.** The share of U.S. adults currently earning income on an app-based platform rose from 23% in 2023 to 28% in 2026, while 80% of workers put in 20 hours or fewer per week.
- 3** **Platform earnings remain a household financial tool to deal with financial burdens.** Four in five (82%) current earners say platform income has been helpful in dealing with inflation, down modestly from 85% in 2023.
- 4** **Multi-platform earning is the dominant pattern, and a modestly growing share of current earners now work without a traditional W-2 job alongside platform earnings.** 77% of ever-earned workers have earned on two or more apps during a work period in 2026, while the share of earners without a W-2 job rose to 37% in 2026.
- 5** **Independent contractor status retains durable, bipartisan, cross-demographic support.** More than two-thirds (69%) of ever-earned workers support maintaining independent contractor classification, virtually unchanged from 2023 (70% support).

## METHODOLOGY

This nationwide poll was conducted online between March 18-March 26, 2026, among a sample of 10,010 adults. State-level results are estimated by a Multilevel Regression and Poststratification (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 4,354 *Adults Who Have Ever Been an App-Based Worker* and 2,804 *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.



SECTION 1

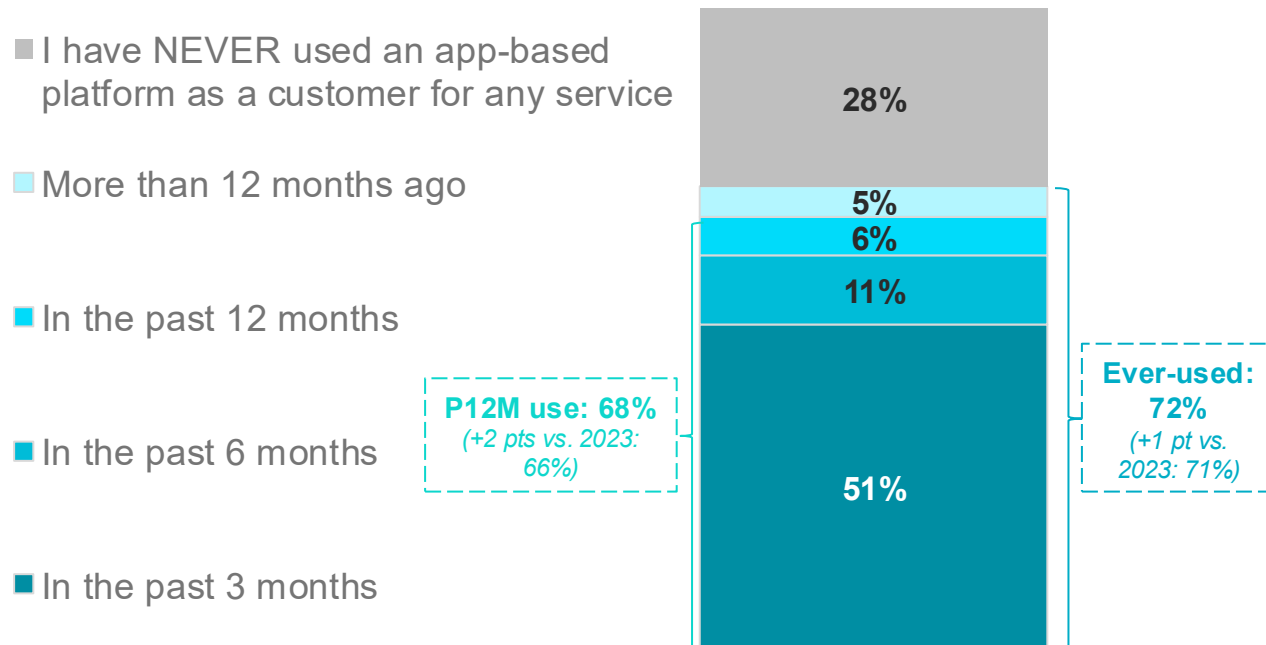
# Consumer Use of App-Based Platforms

## CONSUMERS USE OF APP-BASED SERVICES

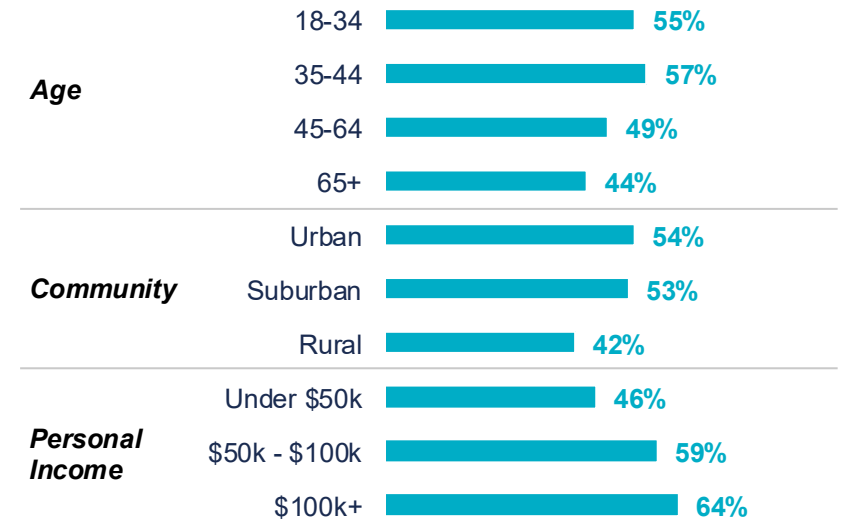
Consumer adoption of app-based platforms has cleared the saturation threshold: 72% of U.S. adults have ever used one, and 51% used one in just the past three months.

*Working-age and higher-income households are the heaviest recent users, but absolute participation is high in every cut.*

### Recent Usage of App-based Platforms as Customers



### Past-three-month customer usage by demographic:



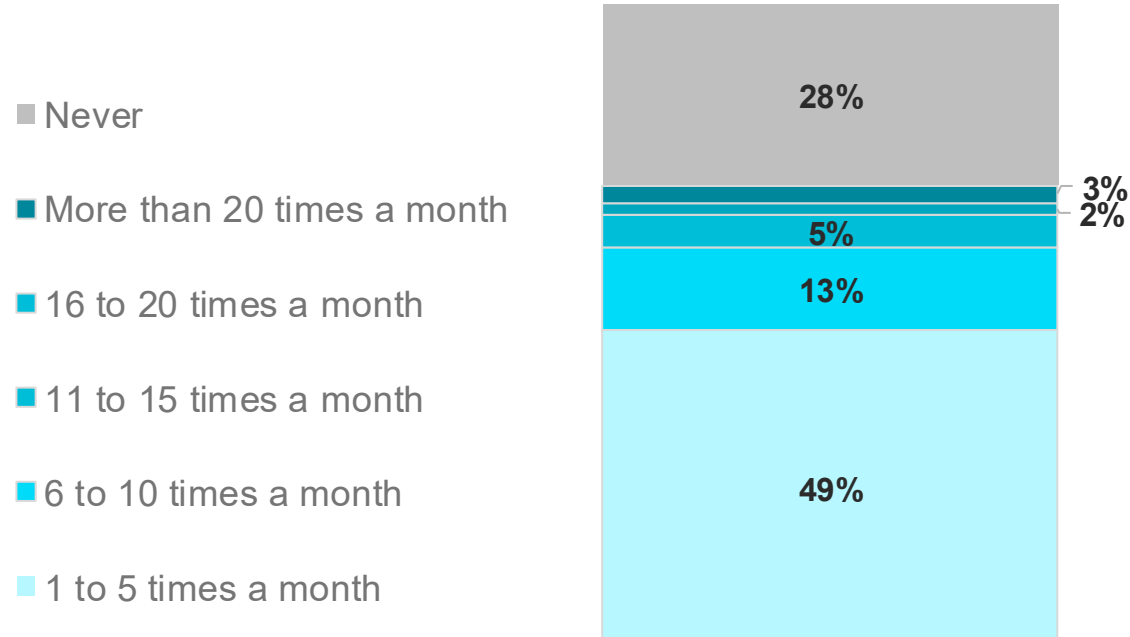
How recently, if ever, have you used an app-based platform as a customer for any service?

## CONSUMERS USE OF APP-BASED SERVICES

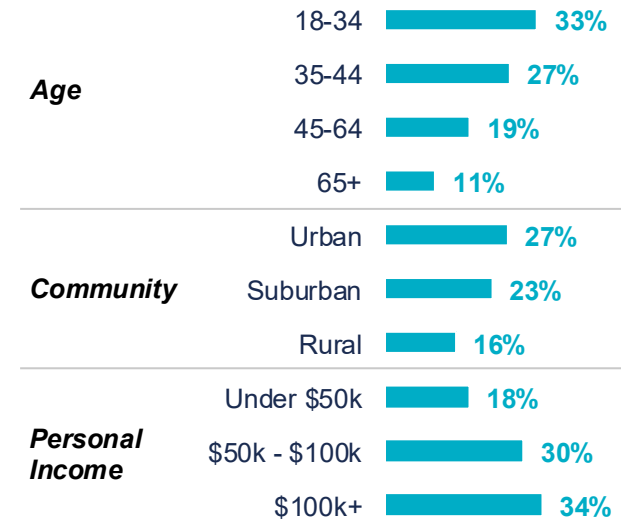
**Nearly a quarter (23%) now use app-based platforms five times or more during a typical month.**

*Intensity of app use varies sharply with age and income: 18-to-34-year-olds and \$100k+ households are 3x more likely to be frequent users than seniors and lower-income households.*

### Frequency of Usage as Customers



### Frequent users (more than 5 times per month) by demographic:

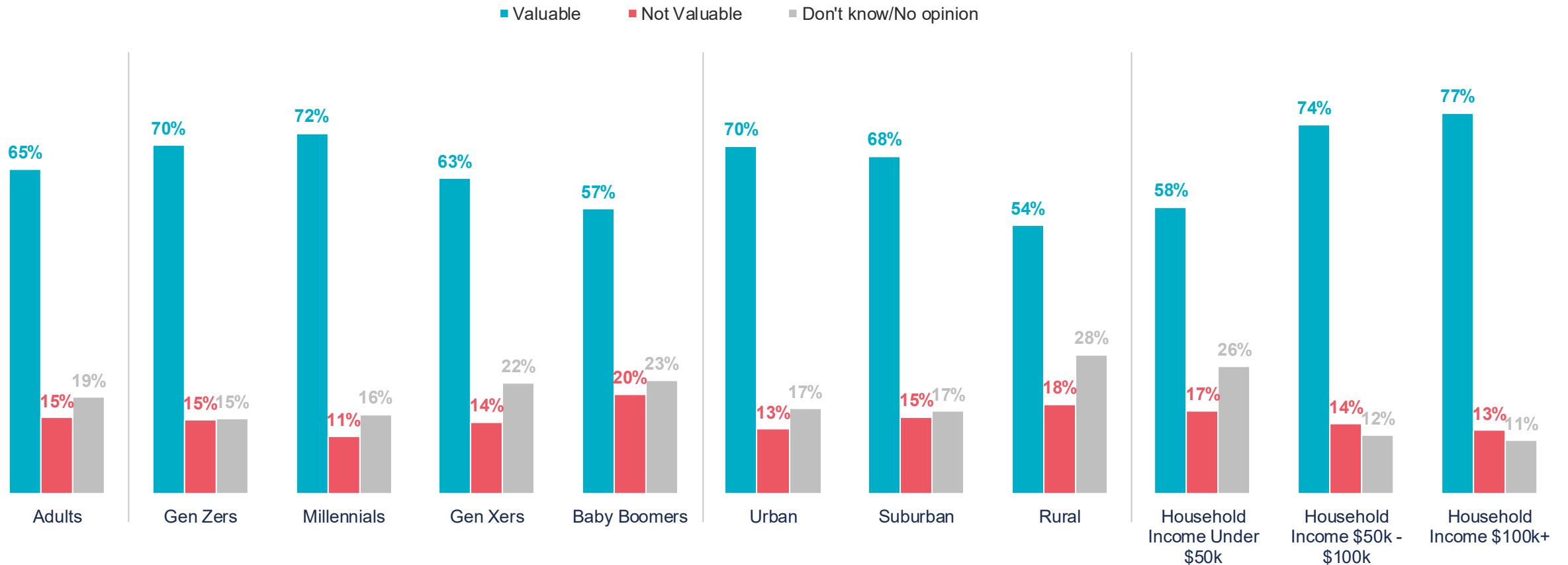


During a typical month, how many times do you use app-based platforms as a customer for any service?

## CONSUMERS USE OF APP-BASED SERVICES

**66% of U.S. adults find app-based platforms valuable to their daily lives, up from 63% in 2023.**

*Regular users routinely rely on platforms and this is reflected in deepening value perception since 2023, with "very valuable" rising from 31% to 32% and "somewhat valuable" rising from 32% to 34%.*



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



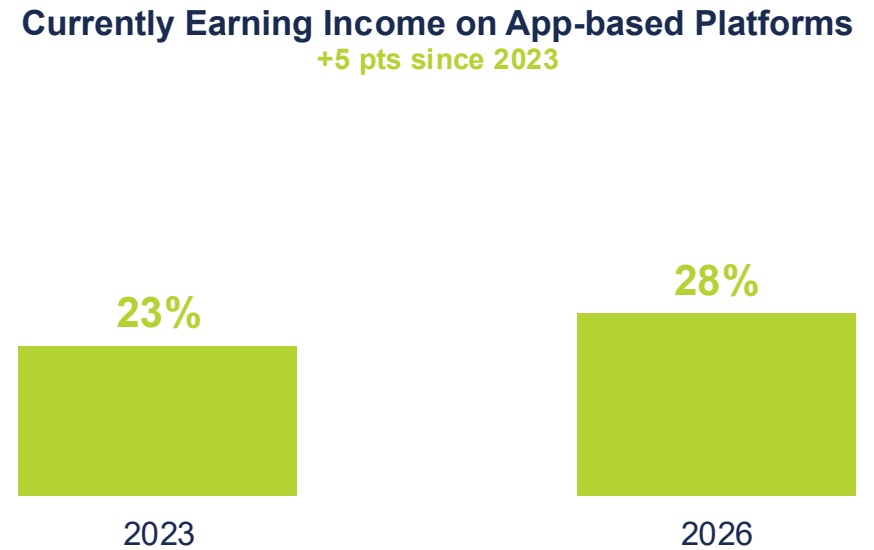
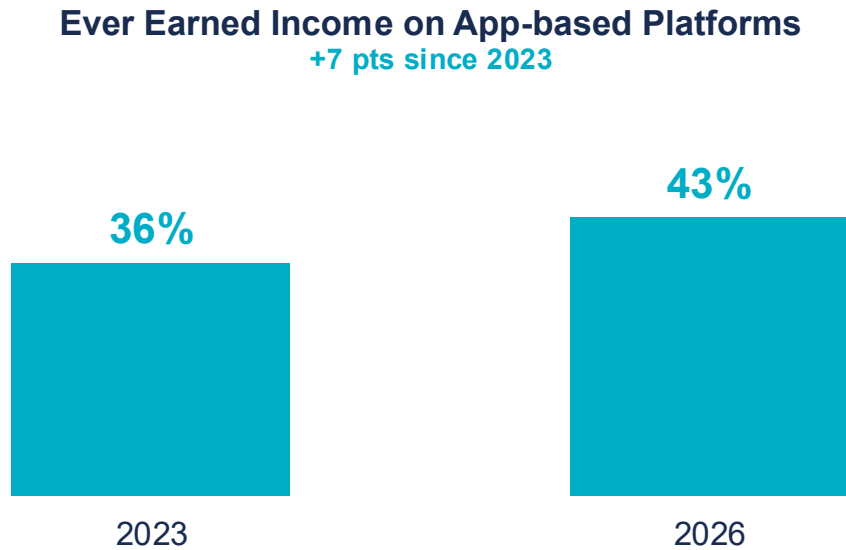
SECTION 2

# App-Based Workforce

## APP-BASED WORKFORCE

The app-based workforce is broader than it has ever been, growing from 23% currently active in 2023 to 28% in 2026.

*Participation now spans every region of the country, with the fastest 2023-to-2026 growth in states that started below the national average. Alaska, Oklahoma, Maine, Idaho, and South Dakota each gained 10 to 13 percentage points in currently-active workers, evidence that platform availability is no longer concentrated in early-adopter coastal metros*



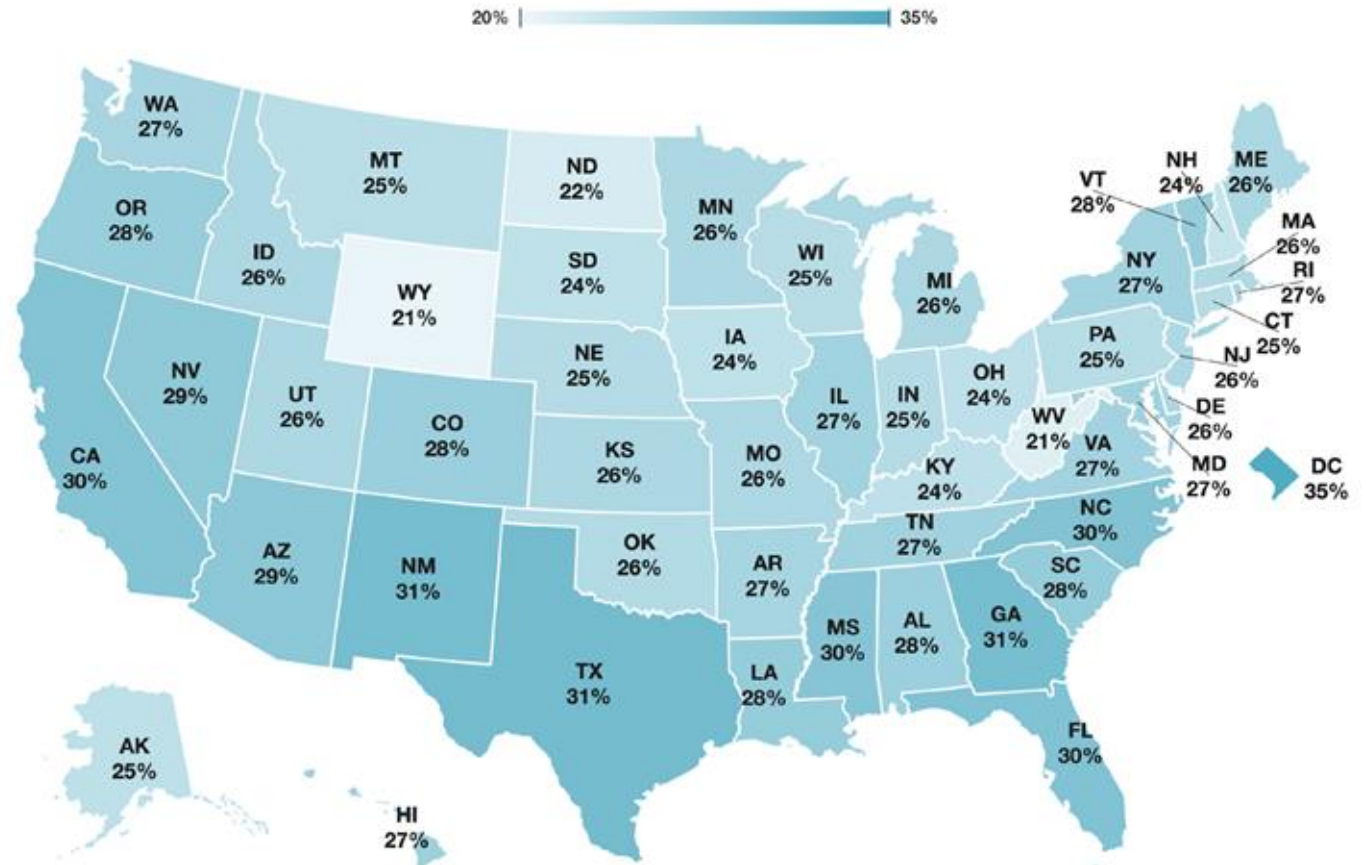
How recently, if ever, have you earned income doing any service or task on an app-based platform? This includes earning income on an app-based platform on a full-time or part-time basis. // Are you currently earning any amount of income doing any service or task on an app-based platform? This includes earning income on an app-based platform on a full-time or part-time basis.

## APP-BASED WORKFORCE

Currently active worker rates exceed 30% in seven states, concentrated in the South alongside several large, diverse metros.

- DC leads at 35%, followed by Texas, Georgia, and New Mexico at 31%, and Florida and North Carolina at 30%.
- The lowest rates are in Wyoming and West Virginia at 21%, a 14-point spread that reflects underlying differences in platform service density and labor market structure rather than worker preferences.

% Currently Earning Income on an App-Based Platform



### TOP 5 STATE-LEVEL GAINS SINCE 2023

Rural and lightly-populated states now participate in app-based platforms at roughly the national rate.

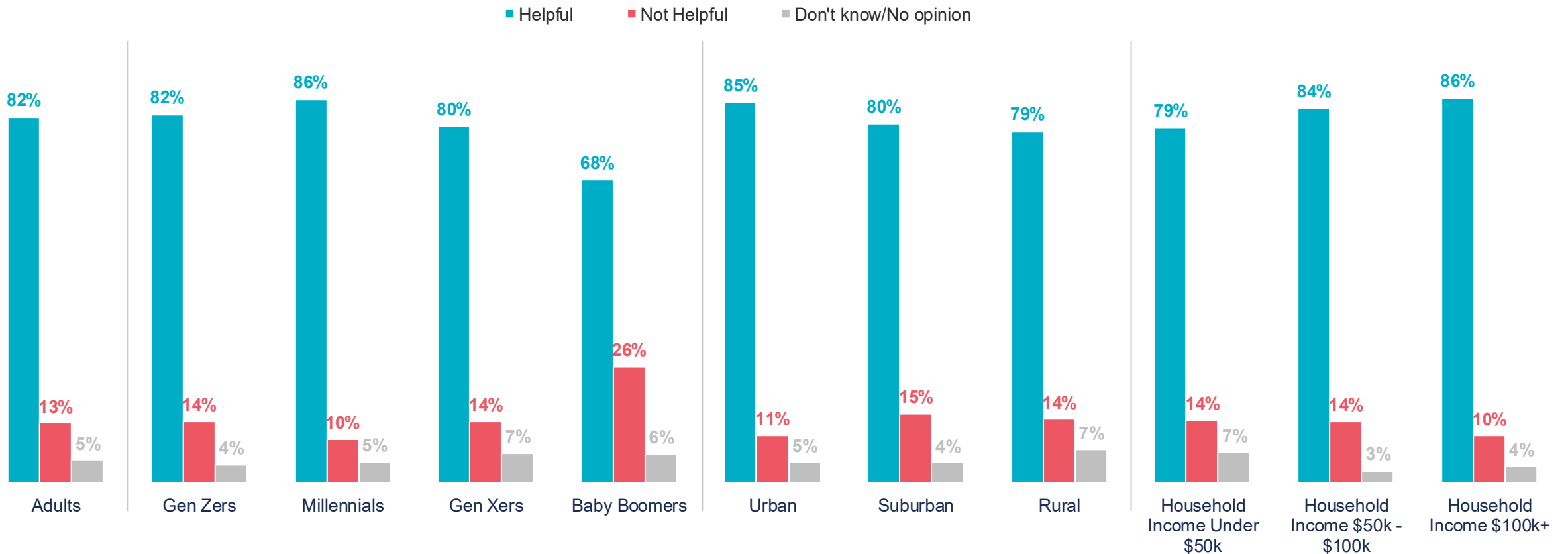
- Alaska 12% → 25% (+13)
- Oklahoma 14% → 26% (+12)
- Maine 15% → 26% (+11)
- Idaho 15% → 26% (+11)
- South Dakota 14% → 24% (+10)

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?

## APP-BASED WORKFORCE

**82% of current earners say platform income has been helpful in dealing with inflation, holding near the 85% reported in 2023.**

*Platforms have moved from acute inflation relief to durable household supplement: "very helpful" fell from 54% in 2023 to 42% in 2026, while "somewhat helpful" rose from 31% to 39%, consistent with headline CPI moderating from its 2022 peak of 9.1% to 2.7% by December 2025.*



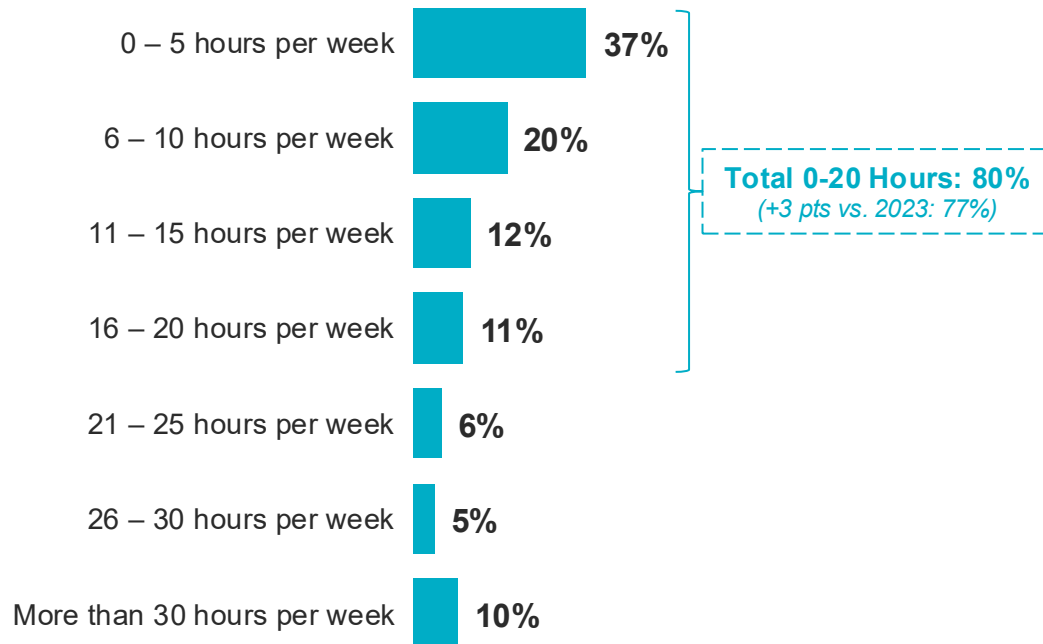
How helpful, if at all, has earning income on an app-based platform been for dealing with inflation?

## APP-BASED WORKFORCE

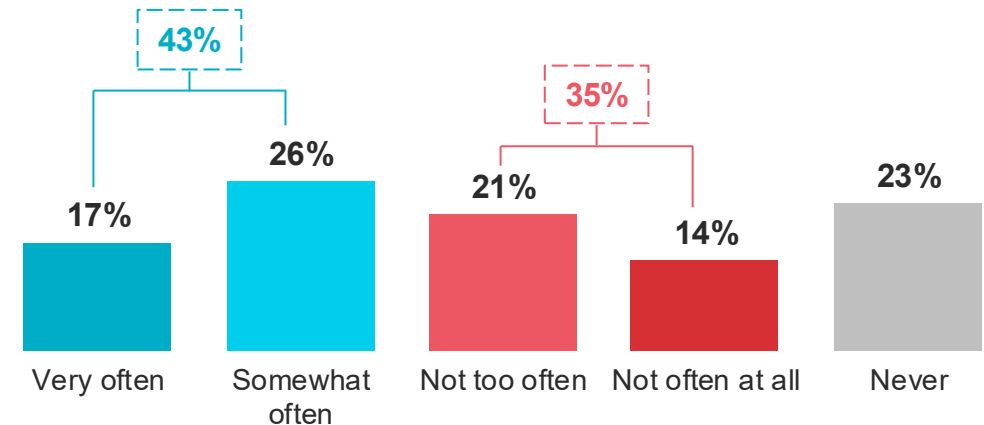
**App-based work remains overwhelmingly part-time: 69% of workers put in 15 hours or fewer per week, virtually unchanged from 67% in 2023.**

*Workers are not choosing between platforms, they are layering them to optimize earnings as “multi-apping” has become the dominant work pattern: 77% of ever-earned workers say they’ve used two or more apps during a work period in 2026.*

**Typical Hours Worked Per Week on App-based Platforms**



**Earning Income on 2+ Platforms**

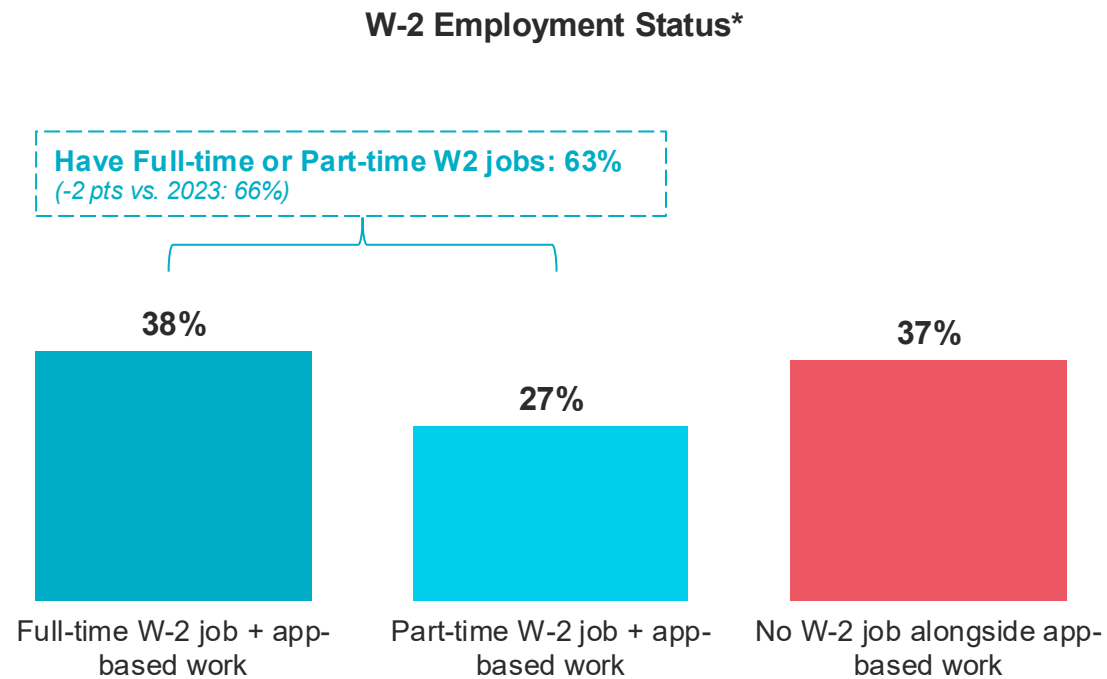


During a typical week, how many hours do you currently or did you previously earn income on app-based platforms? This does NOT include any time spent using app-based platforms as a consumer (i.e., ordering rideshares or food to be delivered to you). // How often, if at all, do you currently or did you previously earn income on two or more app-based platforms during a work period?

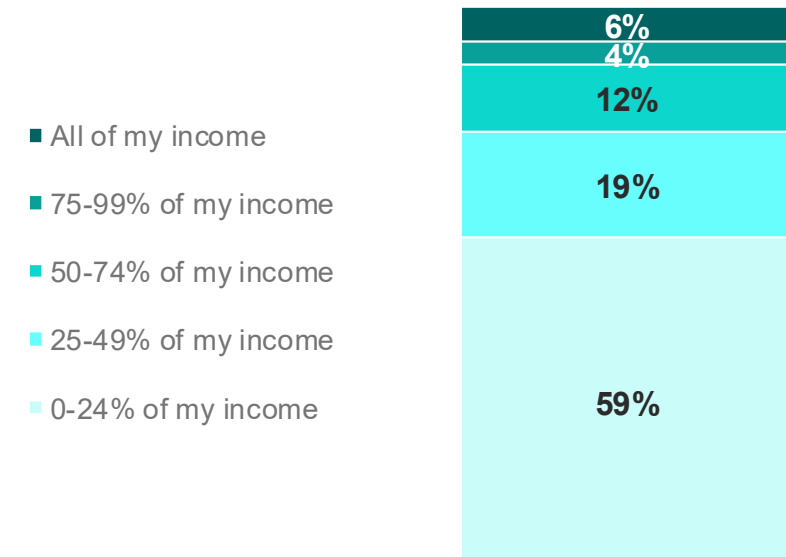
## APP-BASED WORKFORCE

**63% of current earners hold a W-2 job alongside platform work, on par with 66% in 2023, while 22% derive over half their personal income from platforms.**

*The platform income story is increasingly bimodal: a large supplemental-earner majority and a smaller but meaningful core of platform-dependent workers.*



## Share of Personal Income from App-Based Work



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. // 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.



SECTION 3

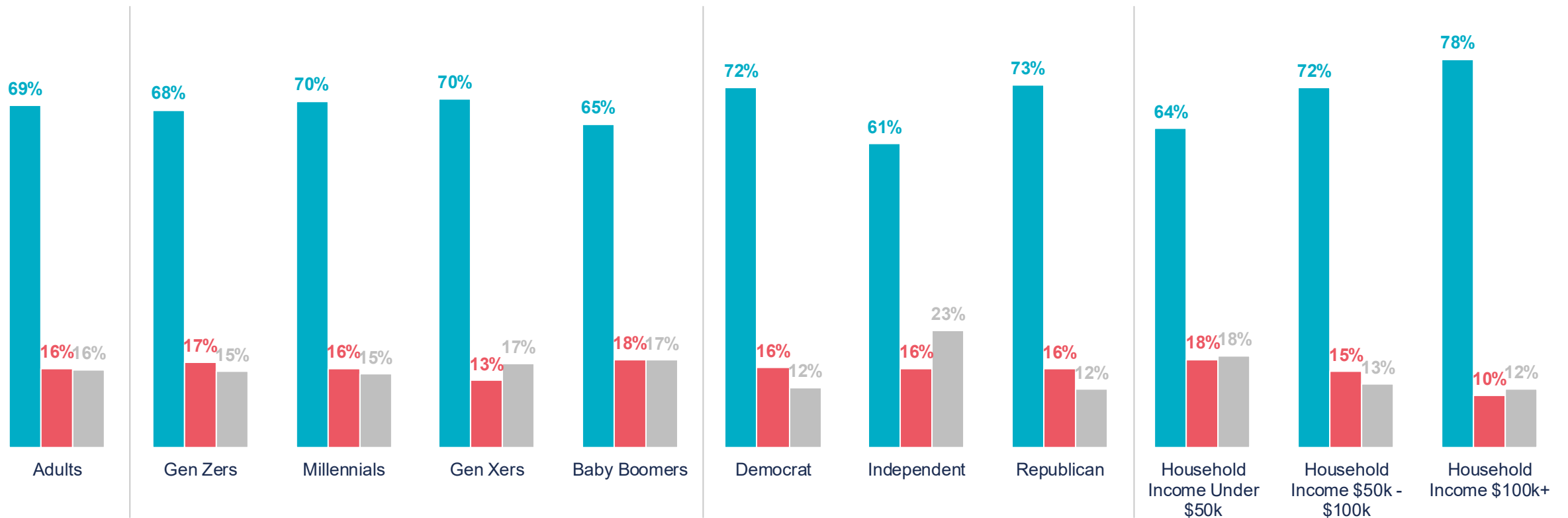
# Classifying App-Based Workforce

## CLASSIFYING APP-BASED WORKFORCE

**69% of app-based workers support maintaining independent contractor classification, virtually unchanged from 70% in 2023.**

*Support is durable across age groups, racial and ethnic groups (Black workers 71%, Hispanic 70%, white 67%), and party lines (Democrats 72%, Republicans 73%, Independents 61%) and across*

■ Support ■ Oppose ■ Don't know/No opinion



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?

## CLASSIFYING APP-BASED WORKFORCE

**Few Americans reward politicians who back reclassification, and those who have a view oppose it by a 1.7-to-1 margin.**

*Only 22% of U.S. adults say they would be more likely to support a politician who backs reclassification. Among the 59% who hold a directional view, opposition (37% less likely) outweighs support by 1.7-to-1, a margin that has held essentially unchanged since 2023.*

1.7x

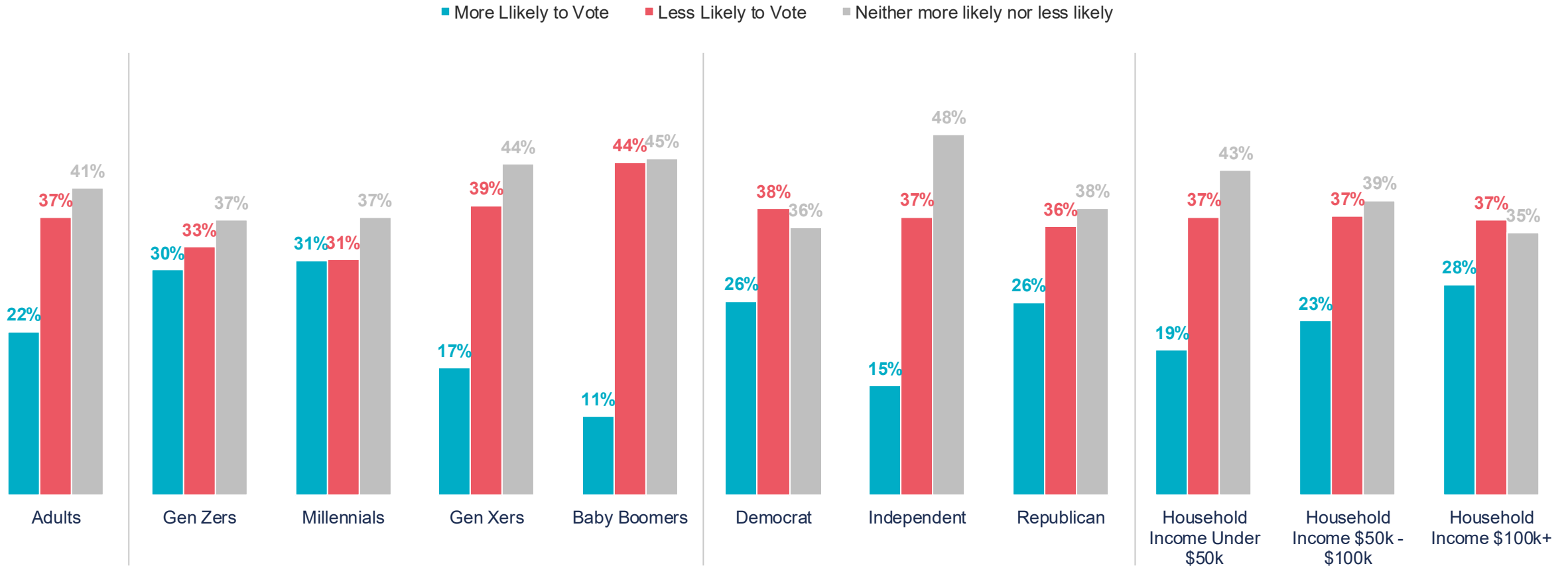
Among adults with a view, opposition to politicians backing reclassification outweighs support by 1.7 to 1.

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?// \*Note: 37% less likely vs. 22% more likely = 1.68x

## CLASSIFYING APP-BASED WORKFORCE

### Across every major demographic group, opposition to reclassification outweighs support.

Among adults with a directional view, opposition to reclassification is consistent across party lines: 38% of Democrats, 36% of Republicans, and 37% of Independents are less likely to support, compared to 26%, 26%, and 15%, respectively, who are more likely.



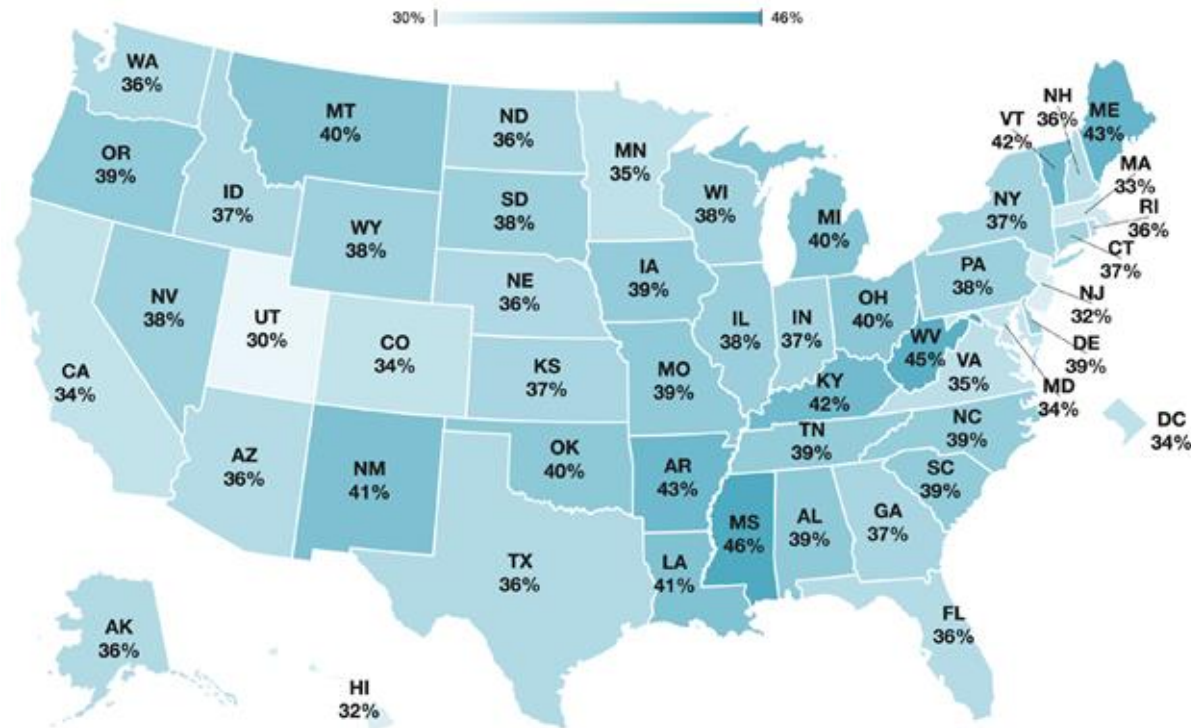
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## CLASSIFYING APP-BASED WORKFORCE

In every state, Americans who oppose reclassification outnumber those who support them, with the largest gaps in Mississippi, West Virginia, Maine, Arkansas, and Vermont.

*The states where opposition most clearly outpaces support cut across the partisan map, from deep-red Mississippi and West Virginia to deep-blue Vermont, reinforcing that resistance to reclassification is a worker-protection story rather than a partisan one.*

### % Less Likely to Vote for Politicians Supporting Legislation That Could Change Classification of Independent Workers

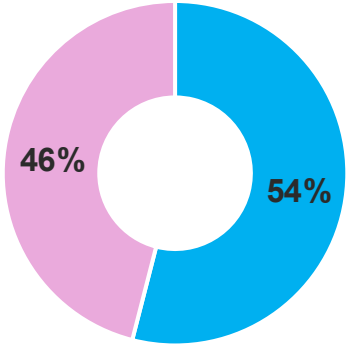


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# Appendix

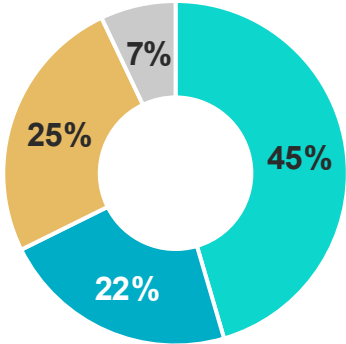
# Current App-Based Workforce Profile

**GENDER**



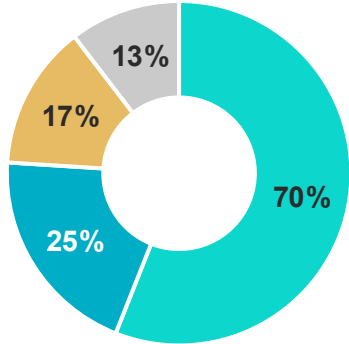
■ Male ■ Female

**AGE**



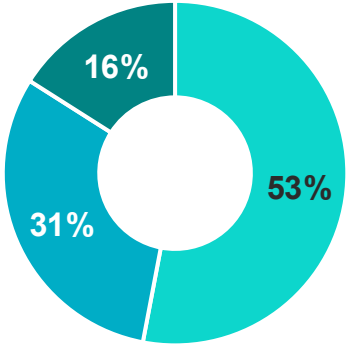
■ 18-34 ■ 35-44 ■ 45-64 ■ 65+

**ETHNICITY\***



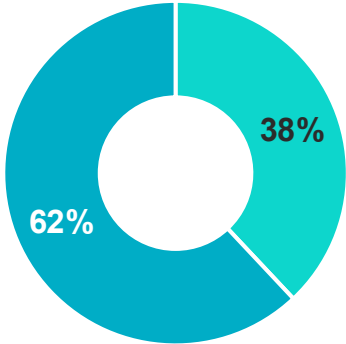
■ White ■ Hispanic ■ Black ■ Other

**ANNUAL HOUSEHOLD INCOME**



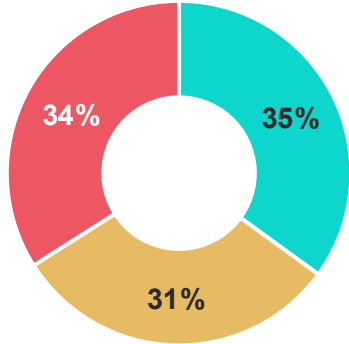
■ Under \$50k ■ \$50k - \$100k ■ \$100k+

**COMMUNITY TYPE**



■ Urban ■ Rural or Suburban

**POLITICAL AFFILIATION**



■ Democrat ■ Independent ■ Republican

## CLASSIFYING APP-BASED WORKERS

### Across all states, adults are more likely to oppose rather than support politicians who back independent worker reclassification.

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?

	More Likely to Vote	Less Likely to Vote	Neither more nor less	NET Likely
Alabama	19%	39%	42%	-21%
Alaska	19%	36%	45%	-17%
Arizona	22%	36%	42%	-14%
Arkansas	17%	43%	40%	-26%
California	25%	34%	41%	-10%
Colorado	23%	34%	43%	-11%
Connecticut	21%	37%	42%	-17%
Delaware	21%	39%	40%	-18%
District of Columbia	34%	34%	31%	0%
Florida	22%	36%	42%	-14%
Georgia	23%	37%	40%	-14%
Hawaii	21%	32%	47%	-11%
Idaho	17%	37%	46%	-20%
Illinois	23%	38%	39%	-15%
Indiana	20%	37%	43%	-17%
Iowa	18%	39%	43%	-21%
Kansas	20%	37%	43%	-17%
Kentucky	17%	42%	41%	-26%
Louisiana	22%	41%	37%	-19%
Maine	14%	43%	42%	-29%
Maryland	23%	34%	43%	-11%
Massachusetts	22%	33%	45%	-11%
Michigan	19%	40%	40%	-21%
Minnesota	20%	35%	46%	-15%
Mississippi	20%	46%	35%	-26%

	More Likely to Vote	Less Likely to Vote	Neither more nor less	NET Likely
Missouri	19%	39%	42%	-20%
Montana	17%	40%	42%	-23%
Nebraska	19%	36%	45%	-17%
Nevada	22%	38%	41%	-16%
New Hampshire	17%	36%	47%	-19%
New Jersey	22%	32%	46%	-10%
New Mexico	25%	41%	33%	-16%
New York	23%	37%	40%	-15%
North Carolina	21%	39%	40%	-18%
North Dakota	20%	36%	43%	-16%
Ohio	20%	40%	40%	-20%
Oklahoma	20%	40%	41%	-20%
Oregon	19%	39%	42%	-20%
Pennsylvania	20%	38%	41%	-18%
Rhode Island	22%	36%	42%	-14%
South Carolina	19%	39%	42%	-20%
South Dakota	18%	38%	44%	-20%
Tennessee	17%	39%	44%	-22%
Texas	23%	36%	40%	-13%
Utah	22%	30%	48%	-9%
Vermont	17%	42%	40%	-25%
Virginia	21%	35%	44%	-14%
Washington	21%	36%	43%	-15%
West Virginia	16%	45%	39%	-28%
Wisconsin	20%	38%	43%	-18%
Wyoming	19%	38%	44%	-19%

