



PROJECT DETAILS

National Survey of 600 Self-Identified

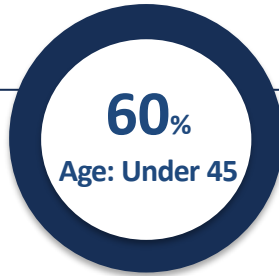
Independent Contractors

Conducted January 2020

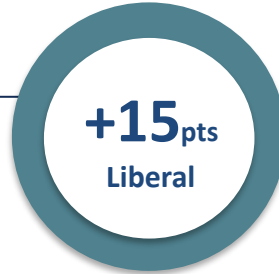


Summary Of Findings

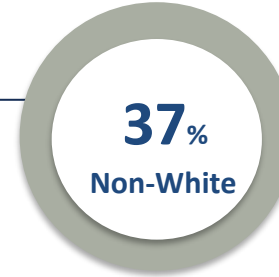
Who Are They?



18-34	34%
35-44	26%
45-54	25%
55-64	11%
65+	4%



Liberal	41%
Moderate	32%
Conservative	26%
NET Liberal	+15



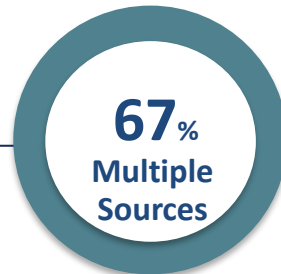
White	63%
Non-White	37%
African American	17%
Hispanic	15%
Asian	5%

- For statistical purposes, what is your age?
- If you had to label yourself, would you say you are a liberal, a moderate or a conservative in your political beliefs?
- What is your race?



Some numbers may be off +/- 1% due to rounding.

Who Are They?



Full Time 69%
Part-Time 26%
Occasionally 4%

One Company 32%
Multiple Companies 46%
Direct for Multiple Customers .. 21%

- Do you work: 1) Full-time (More than 30 hours per week); 2) Part-time (15-30 hours per week); OR, 3) Occasionally (Less than 15 hours per week)?
- Do you currently obtain work opportunities in connection with: 1) One company in particular; 2) Multiple companies; OR, 3) Directly for multiple customers?



33%

Perform App-Based Delivery/Ride Share Work*

(197 Respondents Indicate They Perform Work for a App-Based Delivery and/or Ride Sharing Service)

28%

Technology

Such as web design, app developer, or programmer

27%

Professional Services

Like accounting, legal advice, healthcare, & consulting

27%

Sales

Like real estate, eBay retailer, & social sales/network marketing

27%

Personal Services

Such as hair dresser, tutoring, & fitness

24%

Freelance Communications

Including journalism, copywriting, & social media

22%

App Based Delivery *

Such as Amazon, Doordash, Instacart, Shipt, & TaskRabbit

21%

Ride Sharing*

Such as Lyft or Uber

21%

Creative Design

Including photography & graphic artist

8%

Non App Delivery

Such as grocery stores, newspapers & other products

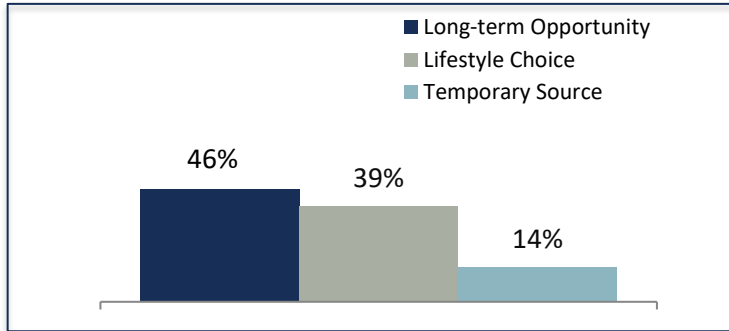
What type of work do you do? (Multiple Responses Allowed)

Some numbers may be off +/- 1% due to rounding.

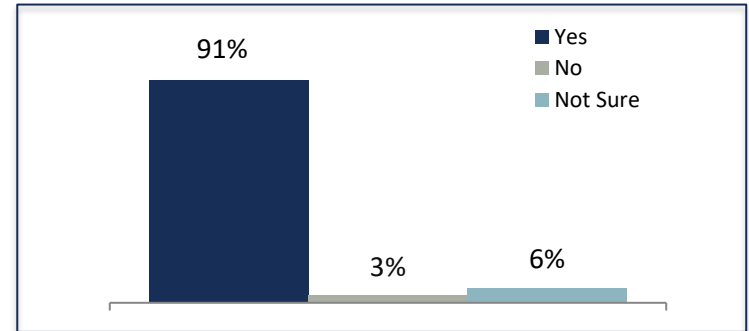
Views About Current Work Arrangement

Is the work you're doing as a freelancer:

- A **long-term** business opportunity;
- A **lifestyle choice**;
- A **temporary, short-term** source of income?



Do you plan to continue working in your current independent work arrangement for the next six months?



Job Satisfaction Rating

Overall, how satisfied or dissatisfied are you with your current independent work arrangement?



94%

Percent Who Say They Are Satisfied with Their Current Work Arrangement

Satisfied	94%
Very satisfied	62%
Somewhat satisfied	32%
Dissatisfied	6%
Not Sure	1%
NET Satisfied	+88

The Rewards & Trade Offs



Like Most About Freelancing

What do you like most about the work you do as a freelancer?

• Own Boss/Work Independent/Additional Freedom	21%
• Work Flexibility	18%
• Work Hours	18%
• Easy/Enjoyable Work	9%
• Good/Great Job	7%
• Customer Service/Interacting with Others	6%
• Money/Pay/Income	5%
• Variety of Job/Work Projects	3%
• Convenient/Work from Home	3%
• Everything	2%
• Reliable/Security	1%
• Other	5%
• Nothing	1%

Like Least About Freelancing

What do you like least about it?

• Low Pay/Income	16%
• Unpredictable/Inconsistent/Instable Pay/Income	11%
• Hours/Long Hours	9%
• Hard to Find Jobs/Gigs	8%
• Being the Boss/Ins & Outs of Running a Business	6%
• Customer Service/Interacting with Others	6%
• Lack of Benefits/Insurance	4%
• High Level of Stress	3%
• Everything	1%
• Other	7%
• Nothing/I Like My Work	26%



63%
Flexibility

vs.

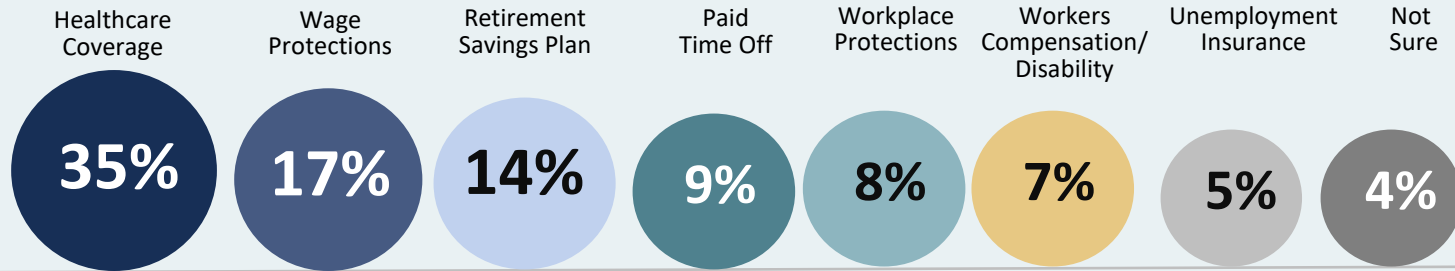


35% Wages/
Stable Income

Employment Benefits

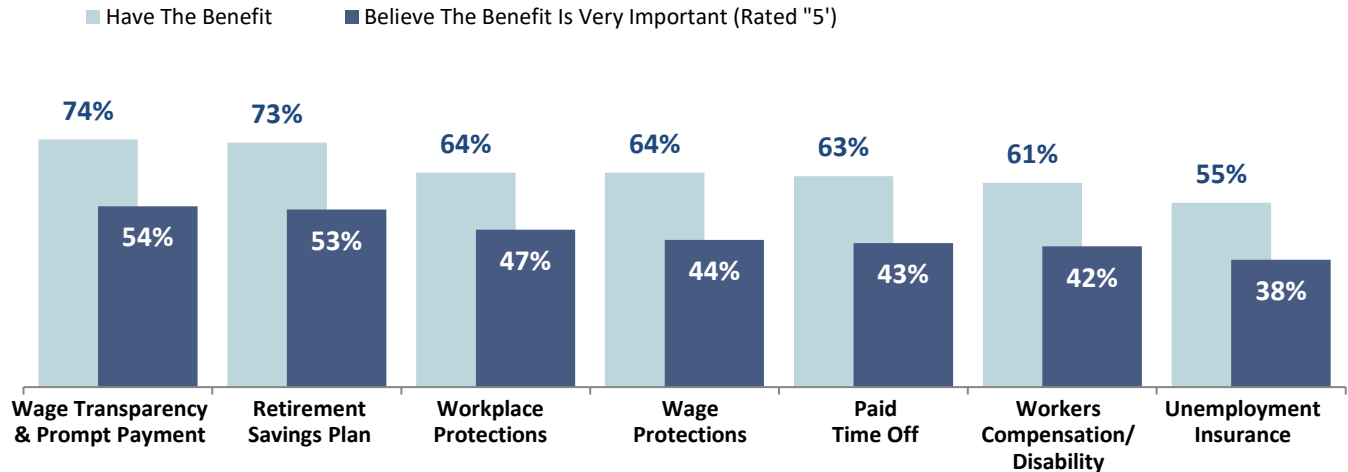
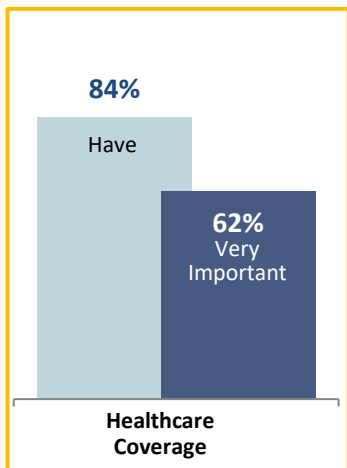
The Benefits that Matter Most

Which would you say is the most important benefit to offer independent workers, like yourself?



Worker Benefits: Those They Have vs. Those Most Important to Have

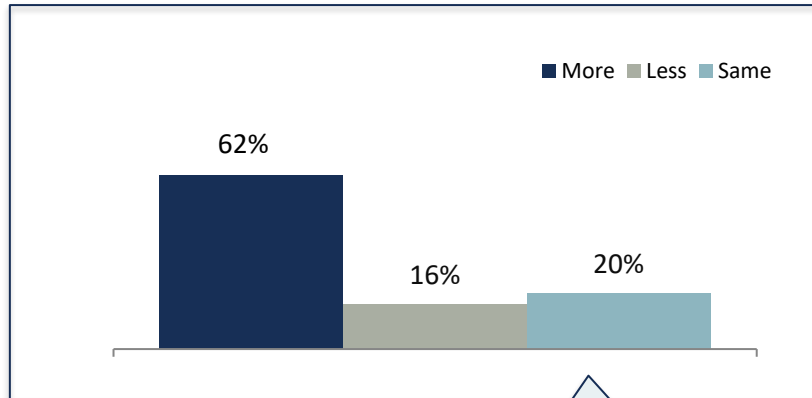
- On a scale of 1 to 5 with 1 Not At All Important and 5 Very Important, please rate how important it is to you personally that you have access to each of the following benefits. Results Below Are Percent Who Rated It A 5—Very Important.
- Which of the following employee benefits and protections do you currently have and how did you obtain them? Results Below Are Percent Who Have It



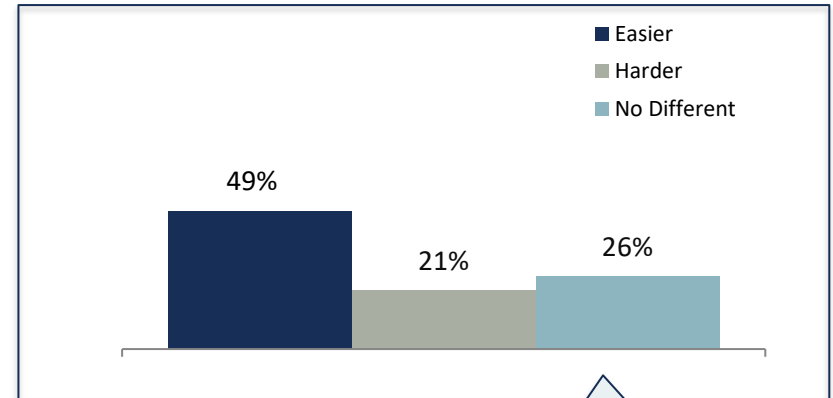
Some numbers may be off +/- 1% due to rounding.

Opportunities for Work

Would you say there are more opportunities or less opportunities to find well-paying and satisfying work as a freelancer compared to 2 to 3 years ago?



Would you say current workplace and labor laws are making it easier or harder to be a freelancer?



Results By Key Audiences

	Overall	Age	
		<45	45+
More	62%	67	53
Less	16%	14	18
Same	20%	18	23
Not sure	3%	1	6
NET More	+46	+53	+36

Results By Key Audiences

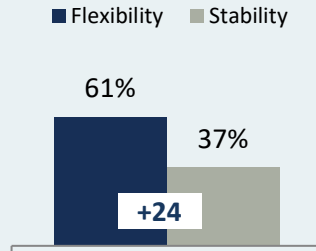
	Overall	Age	
		<45	45+
Easier	49%	56	37
Harder	21%	21	20
No Different	26%	20	36
Not sure	4%	3	7
NET Easier	+28	+35	+17

The Cross Pressures

Flexibility vs. Stability

Which of the following is the most important to you personally:

- Having the **flexibility to choose when and where to work**;
- Having **access to a steady income and benefits**

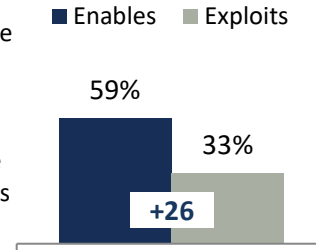


	Overall	App-Based Work	Age		Race		Ideology			
			<45	45+	White	Non white	Very Lib	SW Lib	Mod	Cons
Flexibility	61%	55	54	73	63	59	55	64	62	63
Stability	37%	44	46	25	35	40	43	35	36	35
NET	+24	+11	+8	+48	+27	+19	+12	+29	+26	+28

Enables vs. Exploits

Which comes closest to your own opinion:

- Today's gig economy **enables workers** to take back control from companies and seek out more ownership over their careers and lives;
- Today's gig economy **exploits workers** by making it easier for companies to avoid state and federal labor laws and employee benefits in order to cut costs

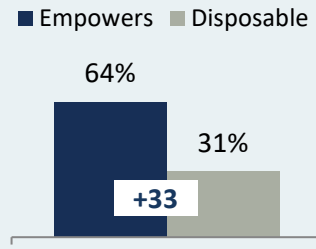


	Overall	App-Based Work	Age		Race		Ideology			
			<45	45+	White	Non white	Very Lib	SW Lib	Mod	Cons
Enables	59%	57	57	61	60	57	59	56	56	64
Exploits	33%	39	36	29	30	39	38	35	37	24
NET	+26	+18	+21	+33	+30	+19	+21	+21	+19	+40

Empowered vs. Disposable

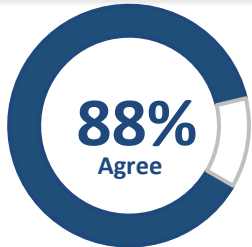
Which comes closest to your own opinion:

- Today's gig economy **empowers workers** by giving them greater freedom and flexibility, encouraging more entrepreneurship, and improving their work/life balance;
- Today's gig economy has **made workers more disposable**, providing them with no financial security, safety net, or basic employee rights



	Overall	App-Based Work	Age		Race		Ideology			
			<45	45+	White	Non white	Very Lib	SW Lib	Mod	Cons
Empowers	64%	66%	62	67	65	63	59	60	65	70
Disposable	31%	31%	33	28	29	34	38	32	32	25
NET	+33	+35	+30	+39	+36	+29	+21	+28	+33	+45

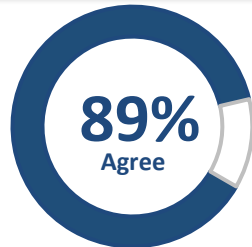
Views on Current Labor Laws



53% Strongly Agree

Technology Making It Easier to Find Well Paying & Satisfying Work

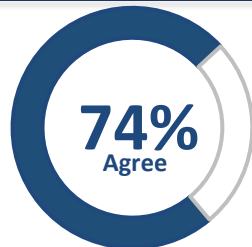
Advances in technology have made it easier for all people—regardless of their college education or background—to find well-paying and satisfying work that fits around their lives, rather than having to fit their lives around their work.



50% Strongly Agree

Workers No Longer Have to be Stuck in Bad Work Situations

Workers no longer have to feel stuck in a bad work situation. Gig work has made it easier for workers to leave a bad situation and try new opportunities that provide additional benefits, flexibilities and are more meaningful and rewarding than a traditional job.



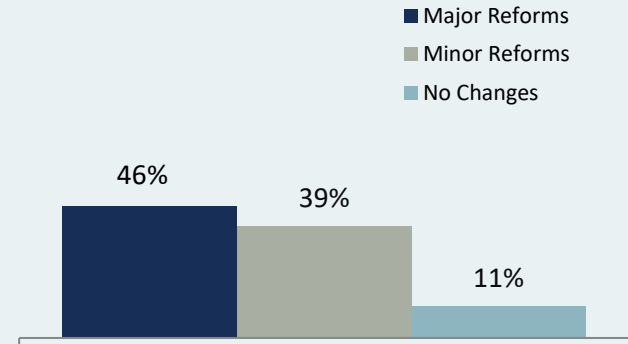
38% Strongly Agree

Today's Labor Laws are Outdated & Hamper Innovation

When it comes to today's gig economy, our workplace and labor laws are extremely outdated and hamper innovation, economic opportunity, and worker empowerment.

Labor Reforms Needed: Major vs. Minor vs. None

In your opinion, do we need major reforms, minor changes or no changes to employment laws related to workers in today's economy?



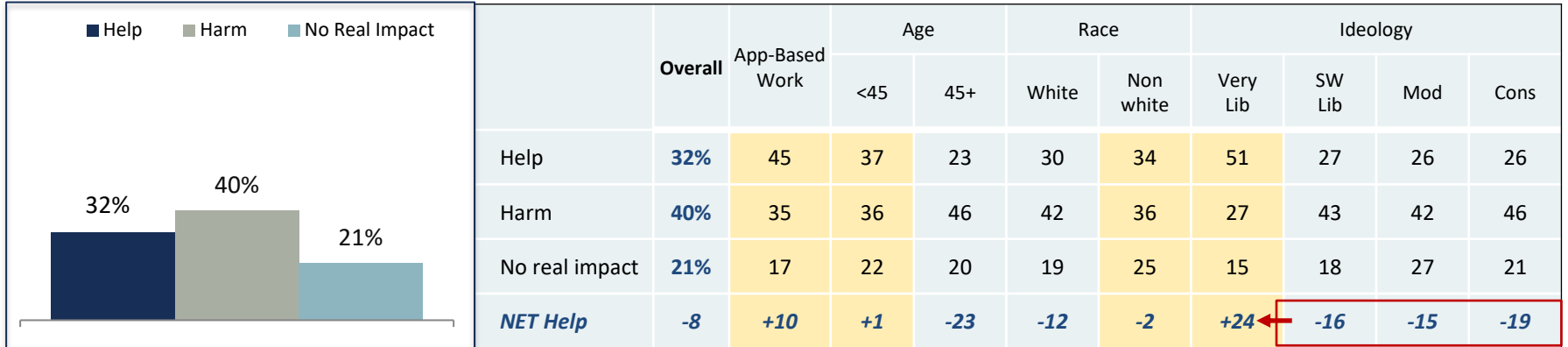
BY KEY AUDIENCES

	Overall	App-Based Work	Age		Race		Ideology			
			<45	45+	White	Non white	Very Lib	SW Lib	Mod	Cons
Major	46%	53	49	42	43	50	71	43	38	37
Minor	39%	36	37	42	41	36	20	46	43	45
No Changes	11%	9	10	11	10	11	6	8	12	15
NET Major	+7	+17	+11	0	+3	+14	+51	-3	-5	-8

The Impact of California AB5

Perceived Impact of AB5

Does making it harder to classify someone as a freelancer or independent contractor rather than a traditional employee help or harm people like yourself?



The Best Path Forward



Advocacy

Trust Most as Your Advocate

Who do you trust the most to advocate on your behalf about the most important issues affecting freelancers and independent contractors like yourself?

● An association that caters to freelancers and independent workers through benefit services and advocacy	38%
● Myself	24%
● A labor union that caters to traditional employees through union dues and organizing	19%
● The government	8%
● Companies	6%
● Not sure	4%

Trust Most to Develop Policies to Protect & Empower Today's Modern Workforce

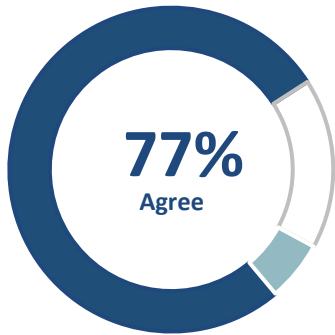
Now, if you had to choose between the following, who do you trust the most to develop policies that protect and empower today's modern workforce including people like yourself?

● Your individual and business customers	28%
● Your elected officials in Congress	26%
● Your state representatives	25%
● Your local elected officials	11%
● Not Sure	11%

Positioning

Politicians are Trying to Fix What's Not Broken

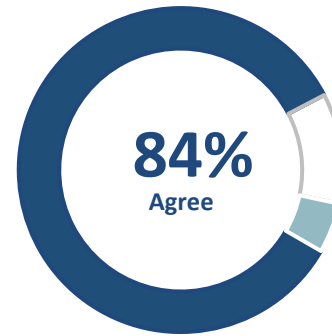
Agree/Disagree: Attempts to crackdown on today's gig economy is another example of policy makers and politicians trying to fix something that's not broken



Agree	77%
Strongly Agree	43%
Somewhat Agree	35%
Disagree	17%
Not sure	6%
NET Agree	+60

Making It Harder to Find Independent Work Not the Solution

Agree/Disagree: Today's gig economy is not without its problems but making it harder for individuals to choose independent work arrangements like freelancing and independent contracting is not the solution

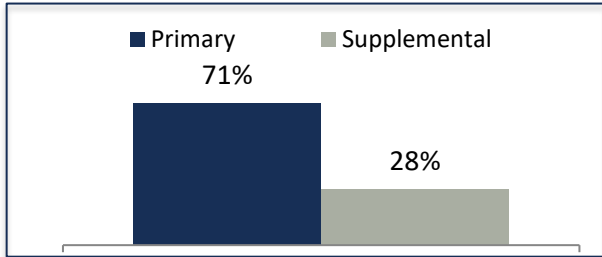


Agree	84%
Strongly Agree	46%
Somewhat Agree	38%
Disagree	11%
Not sure	5%
NET Agree	+73

Appendix

Appendix

Do you consider the amounts you earn as freelancer:
1) A primary source of income; OR, 2) A supplemental source of income



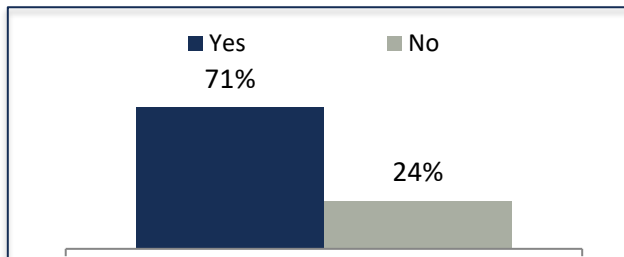
When it comes to your current independent work arrangement, are you paid:

• An hourly wage	37%
• A per-project fee	31%
• An hourly wage plus tips	12%
• A sales commission	8%
• A fixed monthly fee	7%
• A per-delivery fee plus tip	5%
• Prefer not to say	2%

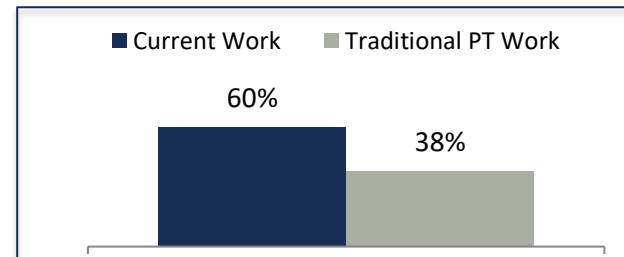
What type of retirement savings plan do you currently have?

• 401 (k) plan	41%
• Roth savings account	19%
• SEP IRA account	7%
• State run retirement program	6%
• Not sure	4%
• Don't have a retirement savings plan	23%

AMONG THOSE WITH TRADITIONAL JOB:
Have you ever considered quitting your traditional job to work solely as a freelancer?



AMONG THOSE WITH TRADITIONAL JOB: If given an option, would you prefer: 1) Your **current independent work arrangement** with control over when and where to work; 2) A **traditional, part-time role** with pre-determined schedule and access to traditional benefits



Appendix

Which of the following should be the top priority for policy leaders and workforce advocates moving forward:

- Ensuring people who want to work independently are treated fairly under the law in terms of access to training, benefits, and certain protections without risking independent work status 41%
- Ensuring independent work is available for a broad range of positions, platforms, and industries 19%
- Ensuring workplace laws and regulations aimed at gig workers are consistent across the country 18%
- Ensuring individuals have the freedom to determine how, when, and where they work 18%
- Not sure 4%

In your opinion, which of the following is the most important issue facing people with independent work arrangements like yourself? Please select just one.

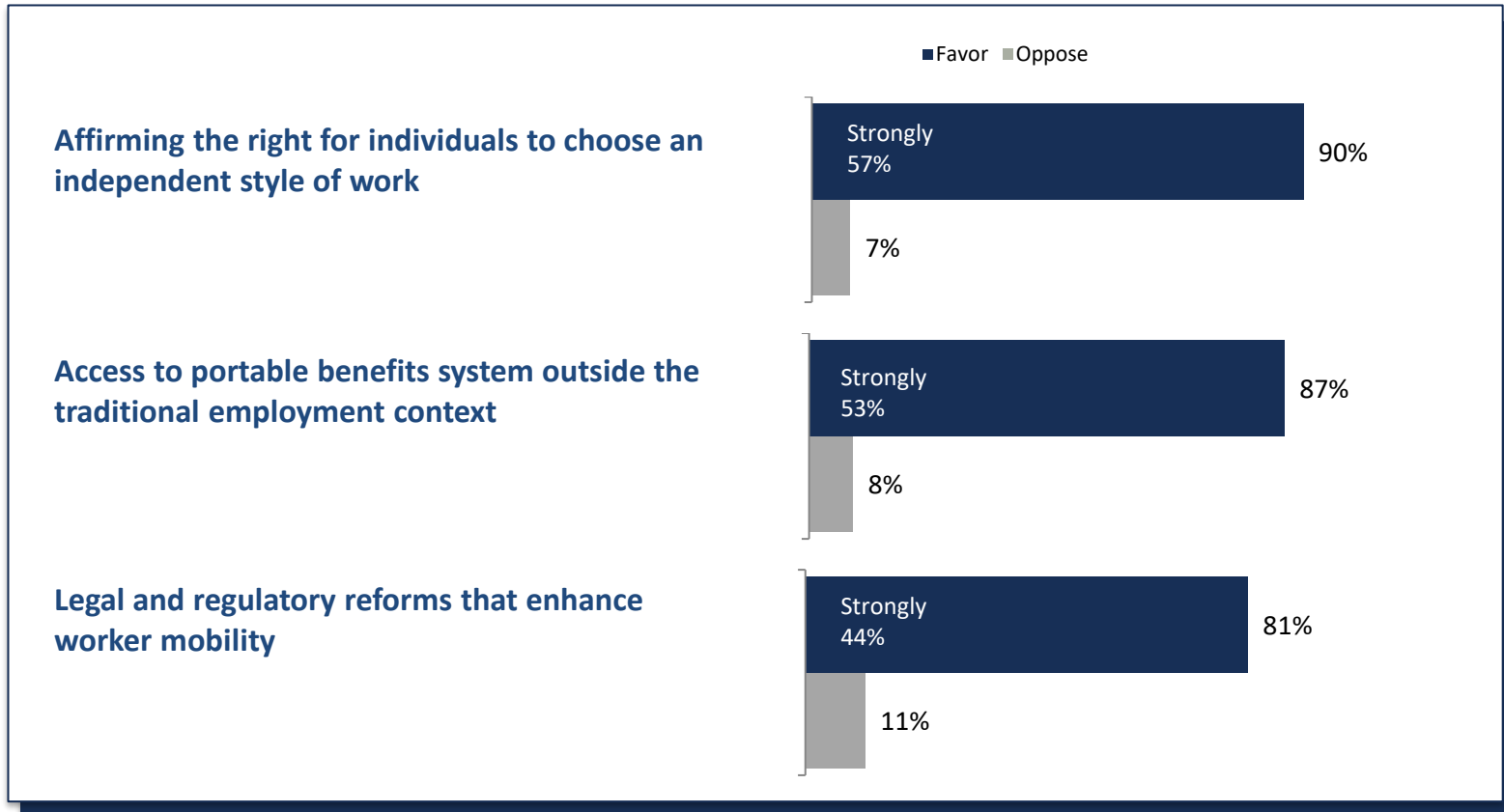
- Access to affordable benefits—including healthcare, retirement, disability and unemployment insurance 29%
- Work/life balance issues—such as flexible hours, scheduling independence, and time off when you need it 26%
- Wage and payment issues—including fair wages, transparency, and prompt payment for services 22%
- Worker protections—such as being respected, treated fairly, and valued for your services 15%
- Complicated and burdensome tax filings 7%
- Not sure 3%

And which of these would make you most willing to consider leaving your current independent work arrangement for a more traditional job with a single company?

- Better pay 32%
- Health care benefits 19%
- Retirement options 9%
- Understanding my personal financial wellness 8%
- Sick leave and paid vacation 6%
- Maternity and paternity leave 4%
- None of these would make me consider leaving independent work 19%
- Not sure 3%

Alternative Labor Initiatives

The following are other ways elected officials and business leaders can help people who freelance or work independently thrive in today's economy. Please indicate whether you favor or oppose each proposal.



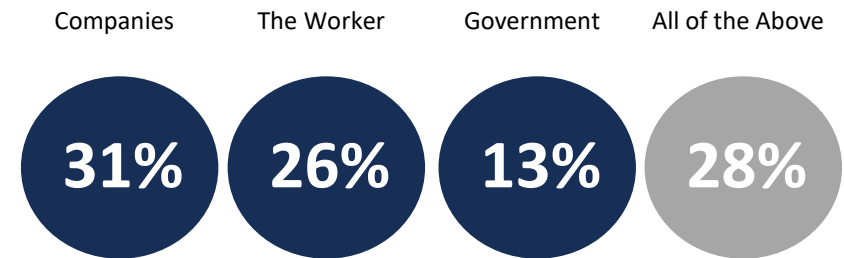
Some numbers may be off +/- 1% due to rounding.

Appendix

When it comes to obtaining important benefits like healthcare, retirement, and disability insurance, which comes closest to your own experience:

- It's a challenge to find access to affordable benefits and **could use more help from the government** to provide them 36%
- It's a challenge to find access to affordable benefits and **could use more options from private market providers** 30%
- There are **plenty of resources available** to get the benefit coverage you need at a price you can afford if you really want them 30%
- Not sure 4%

Generally speaking, who do you think should be responsible for providing workers in today's gig economy with traditional employee benefits like healthcare, retirement plans, and disability insurance?



Appendix

With which political party are you registered?	Republican	31%
	Democratic	44%
	Independent	21%
	Libertarian	2%
	Other	3%
	NET Democrat	+13
What is your gender?	Male	49%
	Female	51%
What state do you live in?	Northeast	18%
	Midwest	21%
	South	38%
	West	23%
Which of the following best describes the area you live?	Urban	45%
	Suburban	37%
	Rural	18%
What is the highest level of education you have completed?	High school	16%
	Some college/Assoc/Trade	32%
	Four-year college degree	26%
	Graduate school	27%
What is your current household income?	<\$50,000	39%
	\$50,000-\$100,000	39%
	Over \$100,000	22%

Some numbers may be off +/- 1% due to rounding.