

PACKET MATERIALS

DATE: January 17, 2020

Item No. 7

LOCAL AGENCY FORMATION COMMISSION

Agenda Packet Contents List

- ☒ Staff Report from Bryan Goebel, Executive Officer
- ☒ Pilot Phase Report: Data Collection and Survey Recommendations
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Completed by: Alisa Somera Date: January 10, 2020

(This list reflects the explanatory documents provided.)



San Francisco Local Agency Formation Commission

City Hall
1 Dr. Carlton B. Goodlett Place, Room 409
San Francisco, CA 94102-4689
Tel. 415.554.6756 Fax. 415.554.5163

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January 17, 2020

TO: LAFCo Commissioners

FROM: Bryan Goebel, Executive Officer

**SUBJECT: Item 7 - Presentation and Update on LAFCo's Survey of
On-demand Workers in San Francisco**

Today I am pleased to welcome Professor Chris Benner from UC Santa Cruz, the principal researcher for our labor survey and study of on-demand workers. He will present the findings of the pilot survey, and talk about the overall study and next steps.

ATTACHMENTS:
-PPT presentation

Labor Survey of On-Demand Workers in the Emerging Mobility Services Sector

Pilot Phase Report: Data Collection and Survey Recommendations

Presented by:

Chris Benner, Ph.D.

Director, Institute for Social Transformation, UCSC

cbenner@ucsc.edu

In collaboration with:

Kung Fung, Executive Director, Jobs With Justice San Francisco

Erin Johansson, Research Director, Jobs With Justice Education Fund

Hays Witt & Matt Schumwinger, Driver's Seat Cooperative

January 17, 2020

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Summary of Key Points

- Pilot phase of study explored two survey methodologies and Driver's Seat Cooperative data collection
- Best survey methodology will work, but somewhat more expensive than originally anticipated
- Driver's Seat Cooperative data is extremely valuable, but more complicated to collect
- With currently available funding, we recommend conducting representative survey of work performed via 6 platforms (2 each for ride hailing, meal delivery and grocery delivery), with 200-250 people per platform, plus supplemental in-depth interview data and Driver's Seat data for a more limited number of respondents

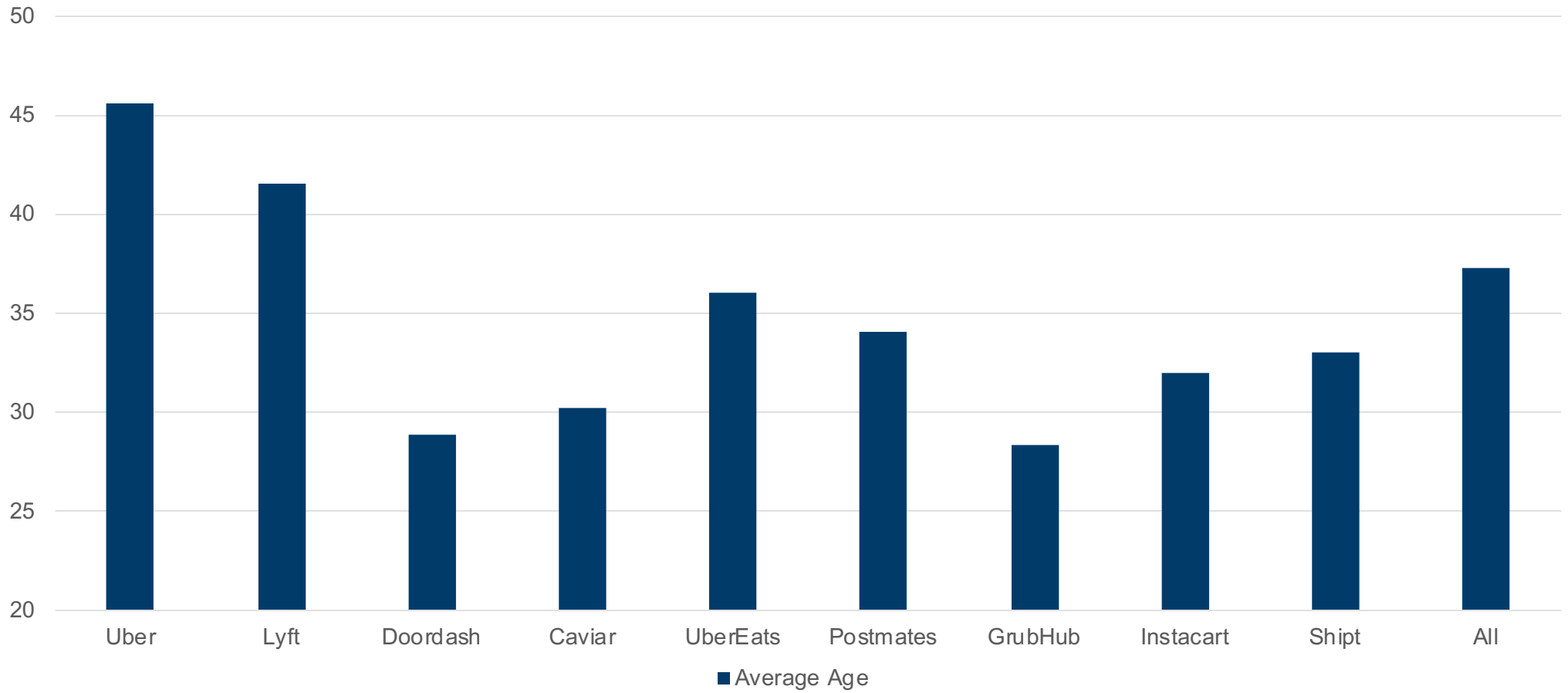
Pilot Survey

- Key goal: Representative sample of *work* not *workers*.
- Data gathered 9/26/2019 – 10/19/2019
- 153 completed surveys by platform:
 - Uber = 33, Lyft = 45, Doordash=26, Caviar = 5, UberEats = 8, Postmates = 10, Grubhub = 8, Instacart = 9, Shipt = 9
- Methodology works, but response rates vary:
 - Ride Hailing ~ 68%
 - Meal Delivery ~15%
 - Grocery Delivery ~43%
 - Alcohol delivery (Saucey, Drizly) challenging

Some Pilot Survey Data

- Note that differences between platforms at the moment are not statistically different.
- This data is intended to be illustrative of what will be gathered in the completed survey and should NOT be cited or referenced at this point in any other way.

Average Age



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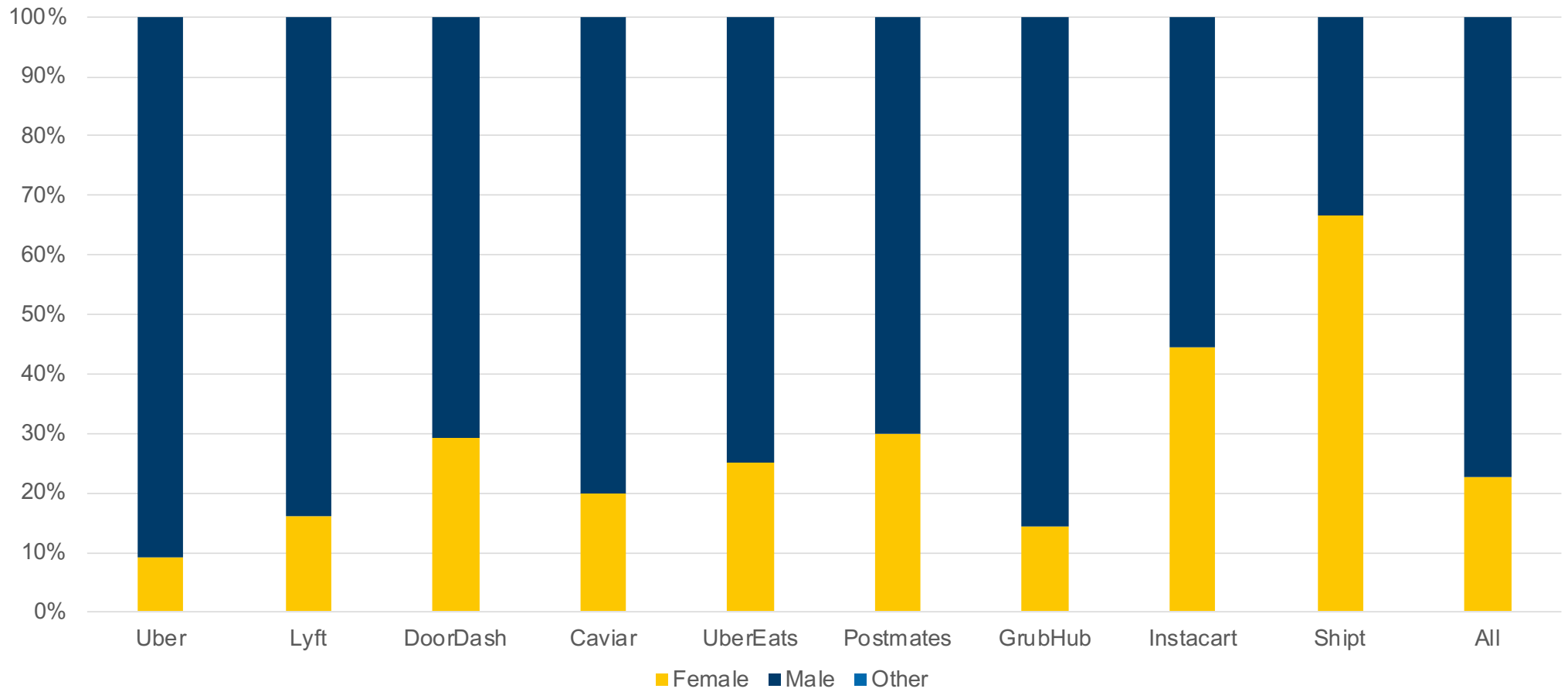


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What is your gender?



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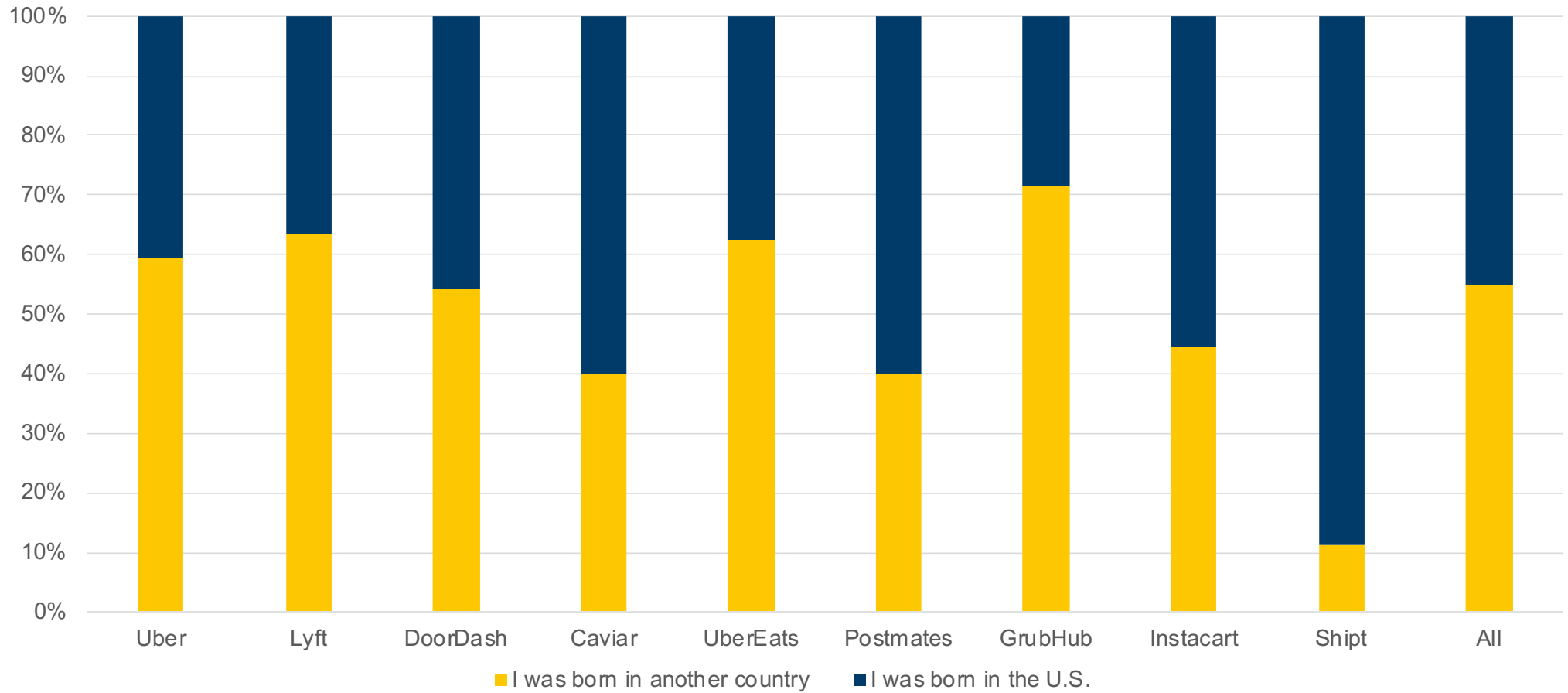


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What is your country of birth?



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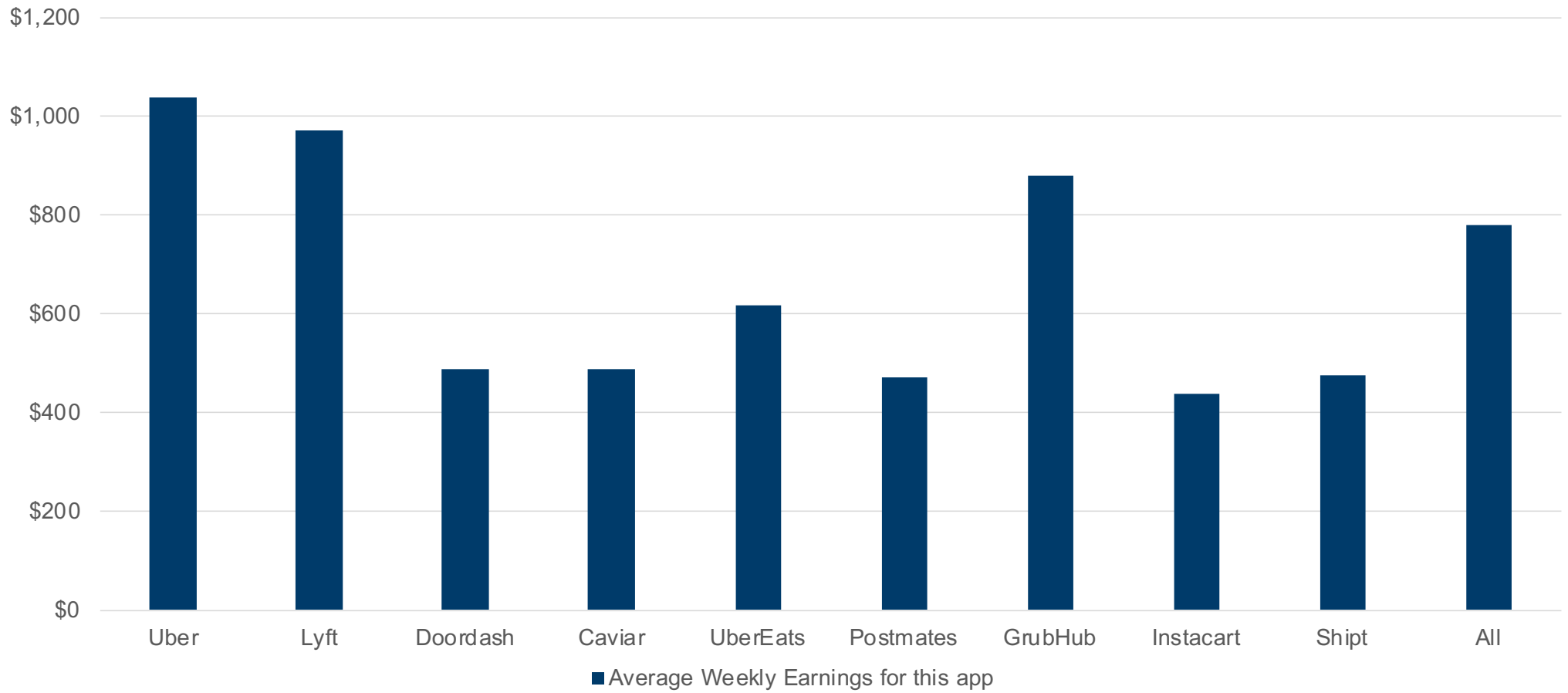


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Average Weekly Earnings for this app



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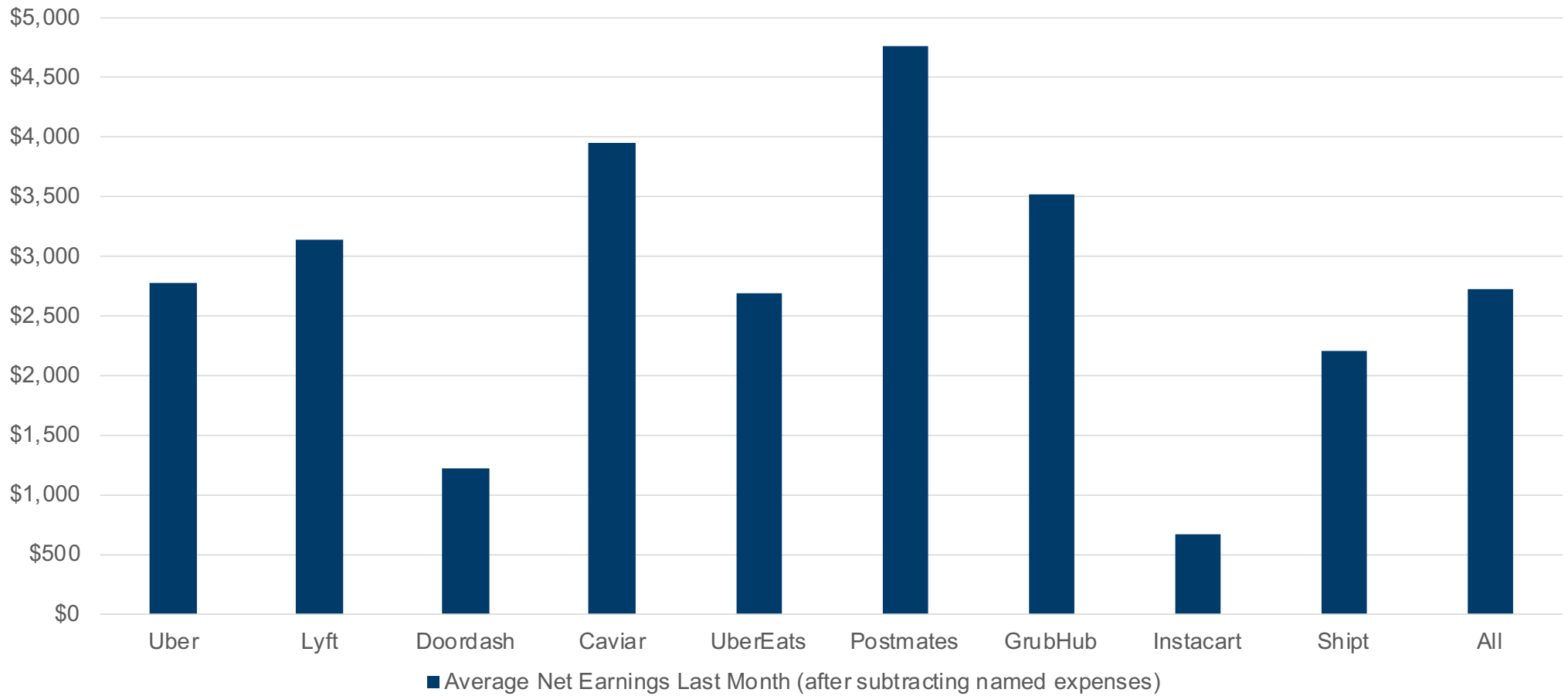


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Average Net Earnings Last Month (after subtracting named expenses)



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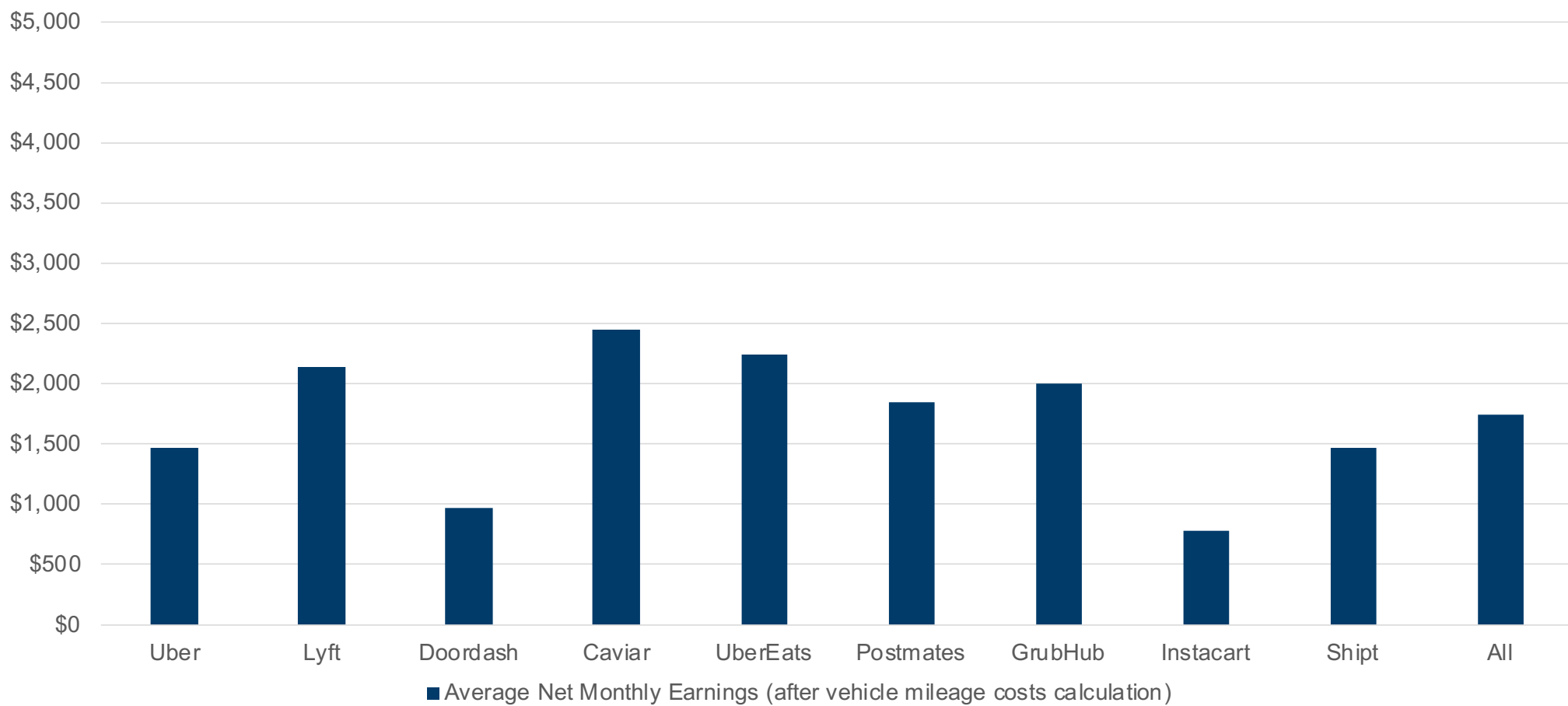


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Average Net Monthly Earnings (after vehicle mileage costs calculation)



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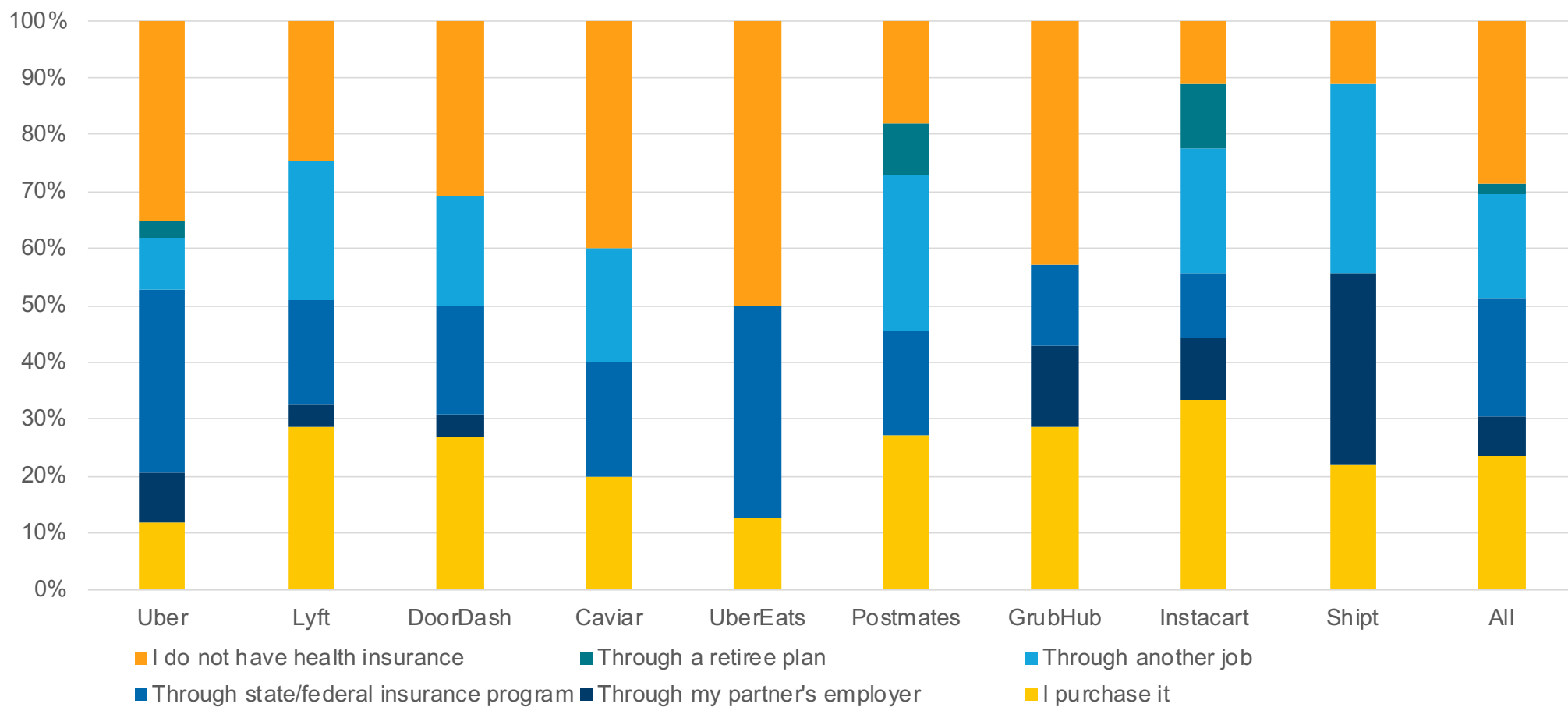


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How do you access health insurance?



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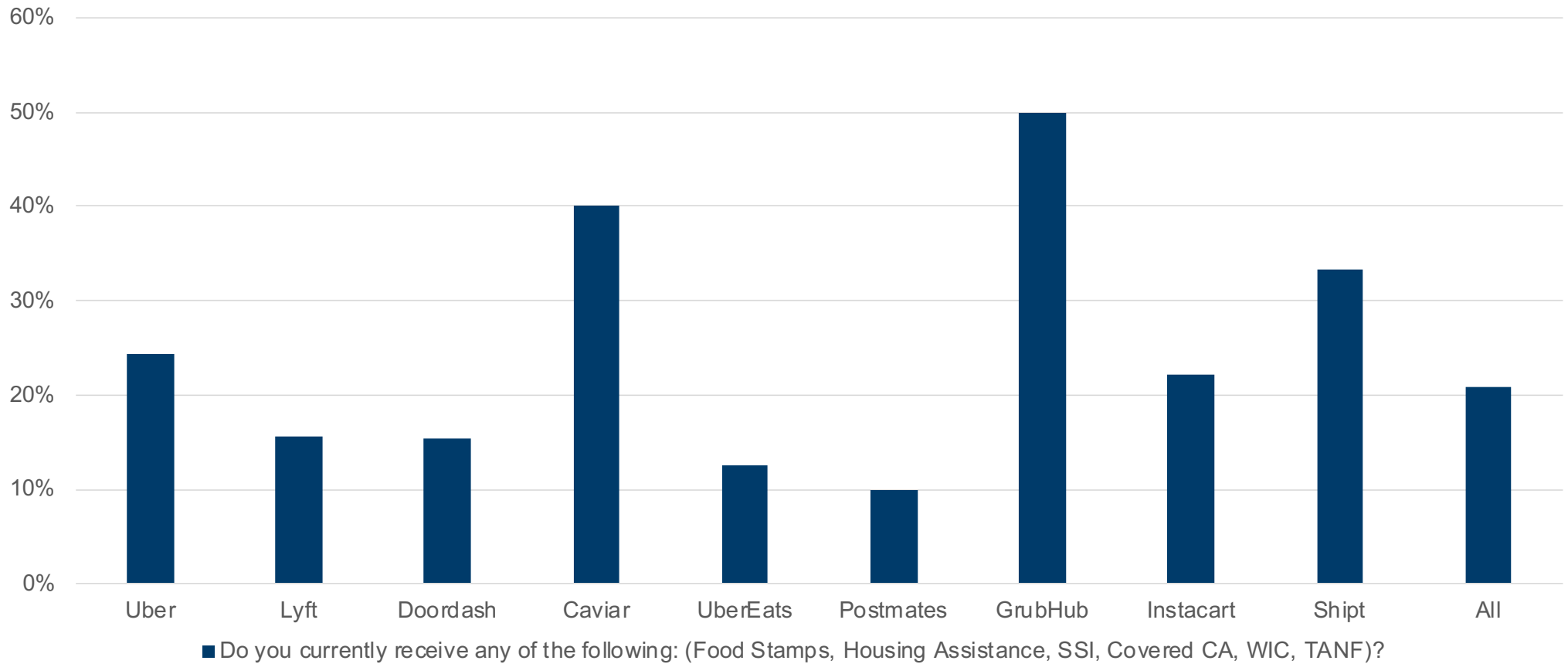


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Do you currently receive any of the following: (Food Stamps, Housing Assistance, SSI, Covered CA, WIC, TANF)?



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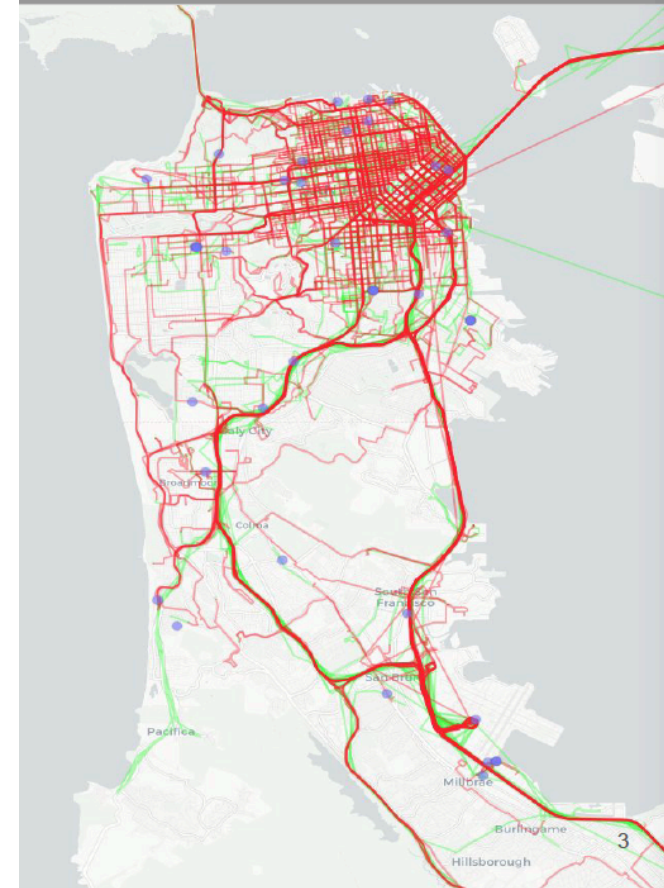


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Summary of Survey Costs and Assumptions					
Platform	Response Rate	Completed Surveys	Total Contacts	Average Cost Per Completed Survey	Total Cost
Uber	75%	200	267	\$55	\$10,987
Lyft	75%	200	267	\$55	\$10,987
DoorDash	15%	200	1333	\$159	\$31,765
UberEats	15%	200	1333	\$159	\$31,765
Caviar	15%	200	1333	\$159	\$31,765
Postmates	15%	200	1333	\$159	\$31,765
Grubhub	15%	200	1333	\$159	\$31,765
Instacart	50%	200	400	\$68	\$13,584
Shipt	50%	200	400	\$68	\$13,584
TOTAL		1800	8000	\$116	\$ 207,968

Pilot: Driver's Seat Cooperative

- 24 drivers installed app (28% of 85 drivers who were offered app)
 - 10 activated drivers (recording 3 or more trips in a day)
 - 5 drivers submitted supplemental
 - TNC earnings and expense info
- 49 driver days (1 user on 1 day) with 3 or more trips
- 540 TNC trips
- 609,737 data observations

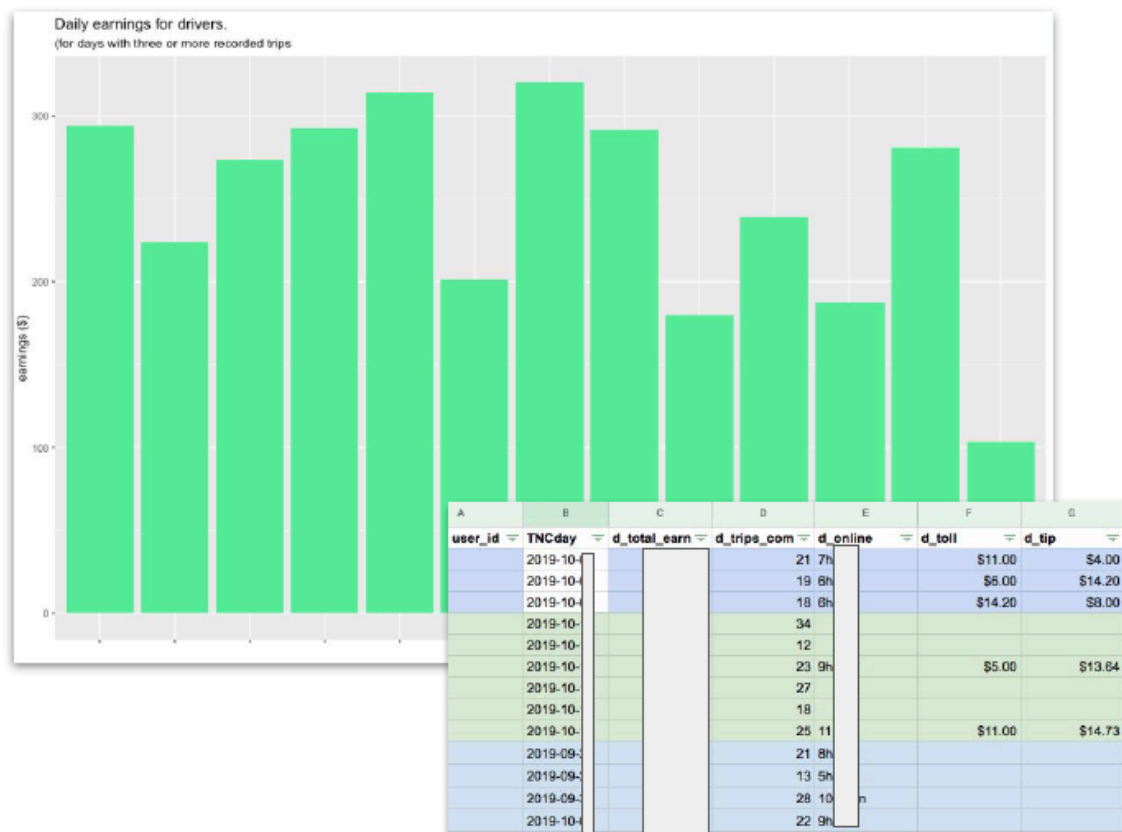


Drivers Seat collects work time and mileage data

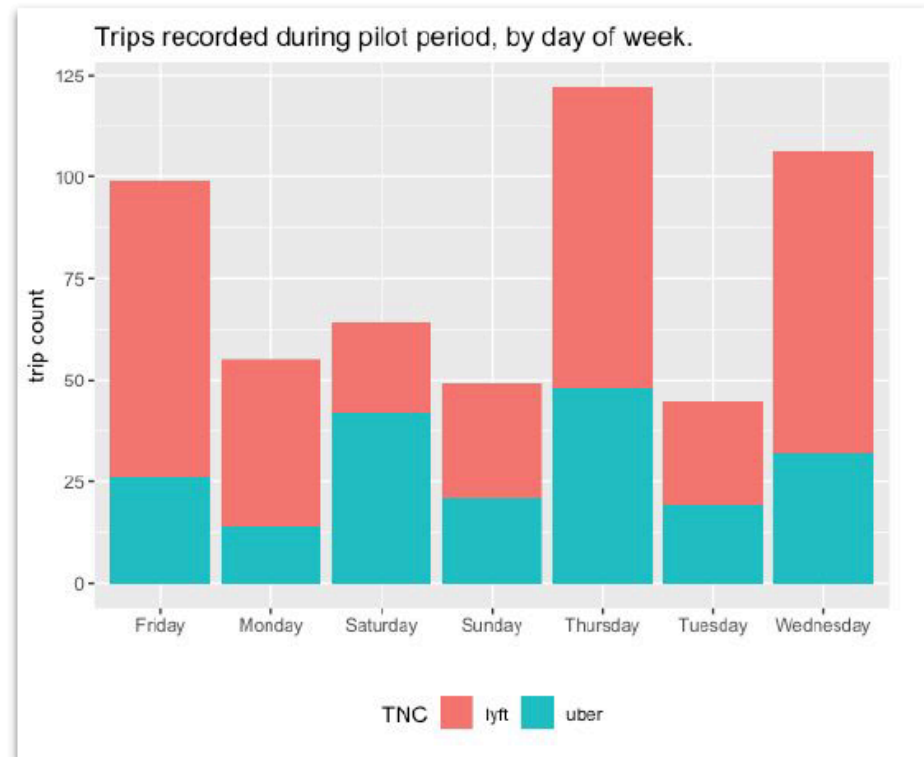
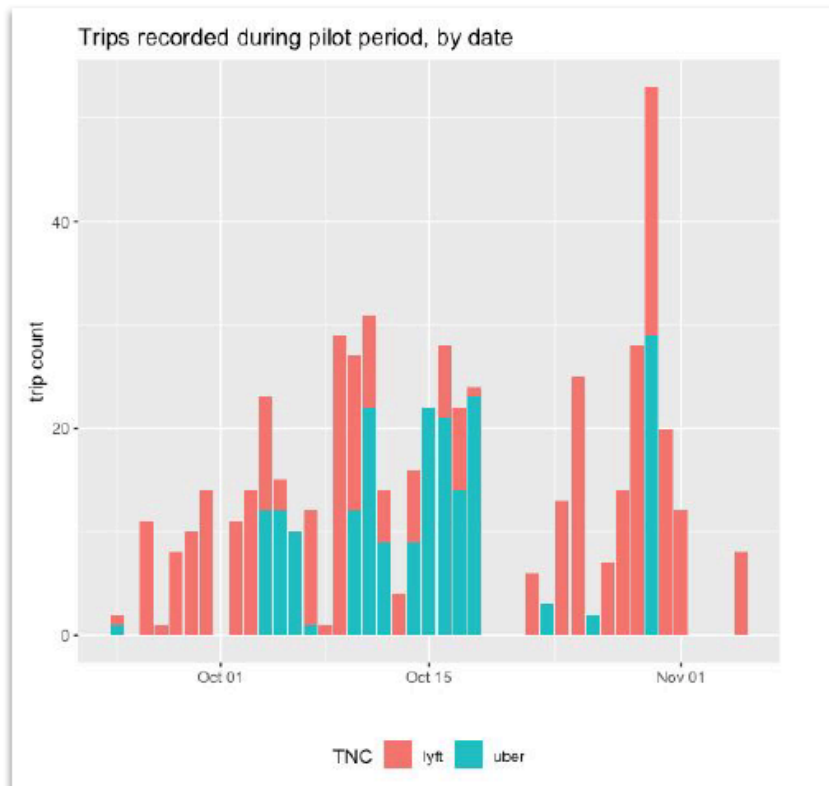
From which, we can calculate:

- Paid/unpaid time ratio
(utilization rate)
- Estimated expenses using IRS
mileage deduction

Total earnings are collected via
supplemental driver data
contributions, and used to calculate
effective hourly pay.



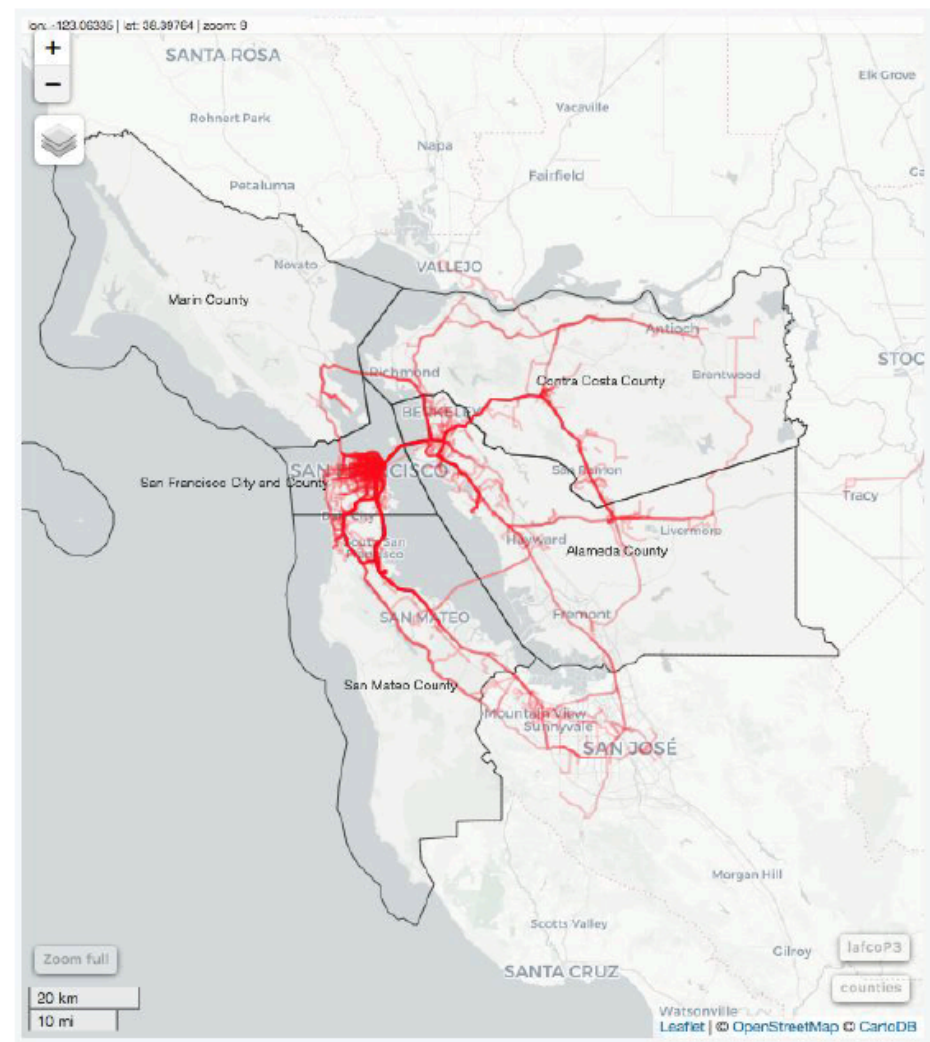
Driver data can be segmented by time.



Data can be cut by any geographic area, enabling intra metro analysis.

SF vs. suburbs breakdown

period	Alameda County	Contra Costa County	Marin County	San Francisco City and County	San Mateo County
P3	13.95%	7.25%	0.94%	33.27%	11%
P1-P2	6.87%	4.47%	0.33%	12.12%	9.44%



(driver work traces across 5-county metro area)

Driver's Seat Implications & Recommendations

- Data extremely valuable for variety of purposes, including real hours, earnings, paid/unpaid time, geography
- Lower than expected onboarding to app, using app correctly, and submitting supplemental information

Summary Recommendations-1

- Representative survey of 200-250 people working on each of 2 ride hailing (Uber, Lyft), 2 meal delivery (DoorDash, GrubHub) and 2 grocery delivery (Instacart, Shipt) platforms (1200-1500 total surveys)
- Supplement with in-depth interviews (~30-50) on policy relevant issues:
 - Experiences with changing algorithms
 - Unpaid wait time
 - Deactivation
 - Safety and Regulatory Issues
 - Attitudes towards collective representation and policies

Survey Recommendations - 2

- Driver's Seat recommendation:
 - Target small number (~25) of drivers for more in-depth training, installation, support
 - Recruit through strong ties amongst frequent/full-time drivers
 - Goal: Through large number of driver days (~250-300), in-depth analysis of work patterns and earnings
 - Pursue other funding and opportunities as well for larger, more representative study
- Total Budget: \$380,000
- Final report release date June 8th