LOCAL AGENCY FORMATION COMMISSION
Agenda Packet Contents List

- ☒ Staff Report from Bryan Goebel, Executive Officer
- ☒ Pilot Phase Report: Data Collection and Survey Recommendations

Completed by: Alisa Somera Date: January 10, 2020

(This list reflects the explanatory documents provided.)
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
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.
What is your gender?

- Female
- Male
- Other

Graph showing the distribution of gender across different delivery services.
What is your country of birth?

- Uber
- Lyft
- DoorDash
- Caviar
- UberEats
- Postmates
- GrubHub
- Instacart
- Shipt
- All

Here is a breakdown of the responses by service:

- **Uber**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **Lyft**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **DoorDash**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **Caviar**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **UberEats**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **Postmates**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **GrubHub**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **Instacart**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **Shipt**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%

- **All**
  - I was born in another country: 60%
  - I was born in the U.S.: 40%
Average Net Monthly Earnings (after vehicle mileage costs calculation)

- Uber
- Lyft
- Doordash
- Caviar
- UberEats
- Postmates
- GrubHub
- Instacart
- Shipt
- All

Average Net Monthly Earnings (after vehicle mileage costs calculation)
How do you access health insurance?

- Uber
- Lyft
- DoorDash
- Caviar
- UberEats
- Postmates
- GrubHub
- Instacart
- Shipt
- All

- I do not have health insurance
- Through a retiree plan
- Through state/federal insurance program
- Through my partner's employer
- I purchase it
Do you currently receive any of the following: (Food Stamps, Housing Assistance, SSI, Covered CA, WIC, TANF)?
<table>
<thead>
<tr>
<th>Platform</th>
<th>Response Rate</th>
<th>Completed Surveys</th>
<th>Total Contacts</th>
<th>Average Cost Per Completed Survey</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uber</td>
<td>75%</td>
<td>200</td>
<td>267</td>
<td>$55</td>
<td>$10,987</td>
</tr>
<tr>
<td>Lyft</td>
<td>75%</td>
<td>200</td>
<td>267</td>
<td>$55</td>
<td>$10,987</td>
</tr>
<tr>
<td>DoorDash</td>
<td>15%</td>
<td>200</td>
<td>1333</td>
<td>$159</td>
<td>$31,765</td>
</tr>
<tr>
<td>UberEats</td>
<td>15%</td>
<td>200</td>
<td>1333</td>
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<tr>
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<td>15%</td>
<td>200</td>
<td>1333</td>
<td>$159</td>
<td>$31,765</td>
</tr>
<tr>
<td>Grubhub</td>
<td>15%</td>
<td>200</td>
<td>1333</td>
<td>$159</td>
<td>$31,765</td>
</tr>
<tr>
<td>Instacart</td>
<td>50%</td>
<td>200</td>
<td>400</td>
<td>$68</td>
<td>$13,584</td>
</tr>
<tr>
<td>Shipt</td>
<td>50%</td>
<td>200</td>
<td>400</td>
<td>$68</td>
<td>$13,584</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>1800</td>
<td>8000</td>
<td>$116</td>
<td>$207,968</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>period</th>
<th>Alameda County</th>
<th>Contra Costa County</th>
<th>Marin County</th>
<th>San Francisco City and County</th>
<th>San Mateo County</th>
</tr>
</thead>
<tbody>
<tr>
<td>P3</td>
<td>13.95%</td>
<td>7.23%</td>
<td>0.84%</td>
<td>33.27%</td>
<td>11%</td>
</tr>
<tr>
<td>P1-P2</td>
<td>6.87%</td>
<td>4.47%</td>
<td>0.33%</td>
<td>12.12%</td>
<td>9.44%</td>
</tr>
</tbody>
</table>

(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