Prop 22

California Consumer Survey

October 30, 2020

Background

- ❑ **Audience: 1,000 Consumers in California Balanced to Census**

- ❑ **Demographics Notes: Balancing Notes For This Survey**

  - ❑ **In California, the % of the population that is Hispanic or Latino in origin is higher than the general population in the USA.**

  - ❑ **The % of the population who is Asian is higher than the general population in the USA.**

- ❑ **Definitions:**

  - ❑ **"Likely Voter" = Responded that they are somewhat likely, likely, or very likely to vote in the upcoming election AND said they are more than 50% likely to vote in the election.**

- ❑ **Dates Fielded: 10/28 – 10/30**

- ❑ **Survey Length: 5 Minutes**

I

- ❑ **Voted Already**

- ❑ **Has Not Voted Yet – Likely Voters**

- ❑ **Opinions Toward App-Based Drivers and How They Should Be Classified**

- ❑ **Ride Sharing and Food Delivery App Usage**

- ❑ **Voting in Prior Years**

- ❑ **Demographics**

## Are you registered to vote in the state of California?

Posed to all respondents.

- Yes, I am registered to vote in California — 89.8%
- No, I am not registered to vote in California — 8.7%
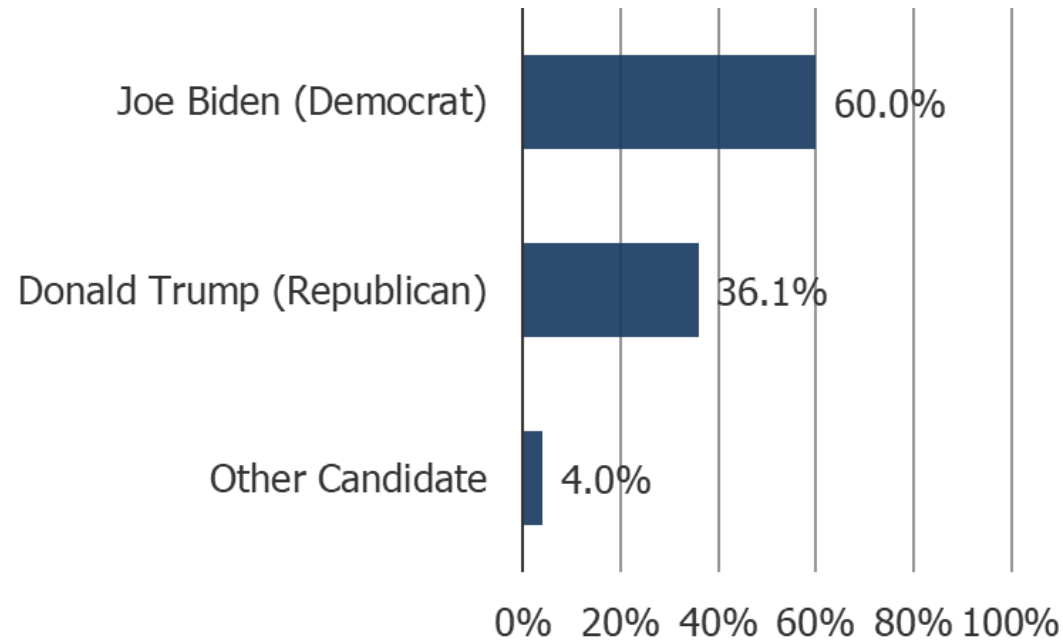- I'm not sure — 1.5%
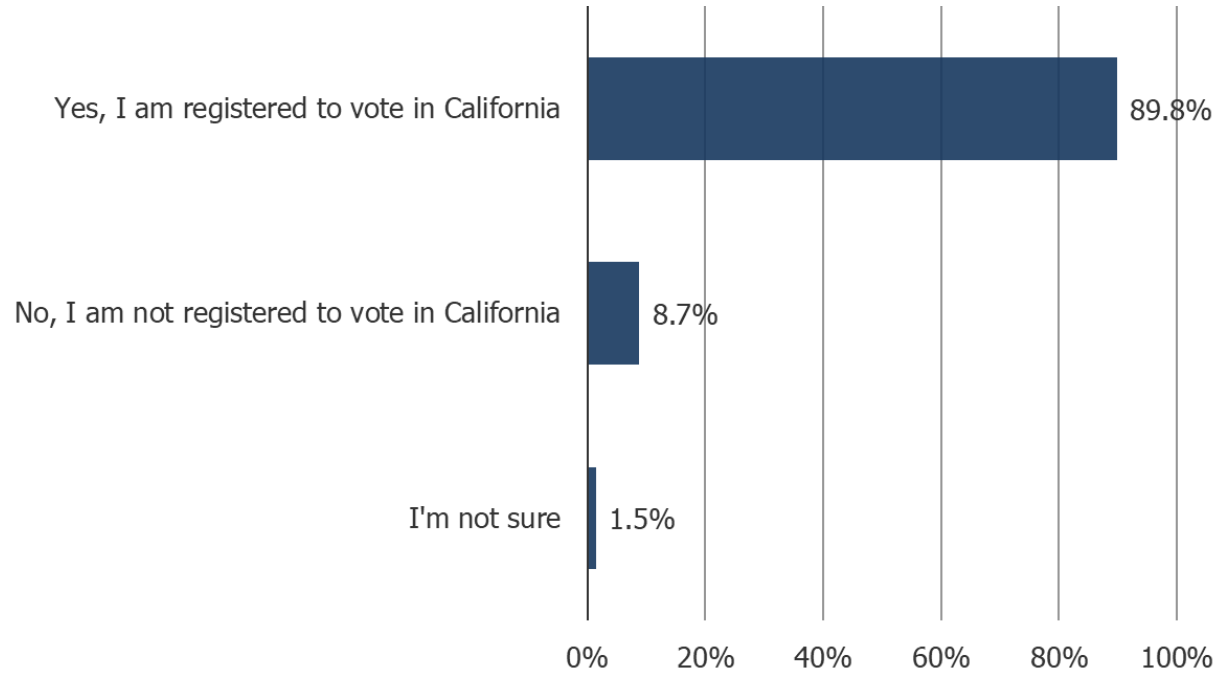
Have you already voted in the 2020 general election? (Election day is November 3rd, but it is possible to have already participated via early voting locations or mail in ballots).

Posed to all respondents.
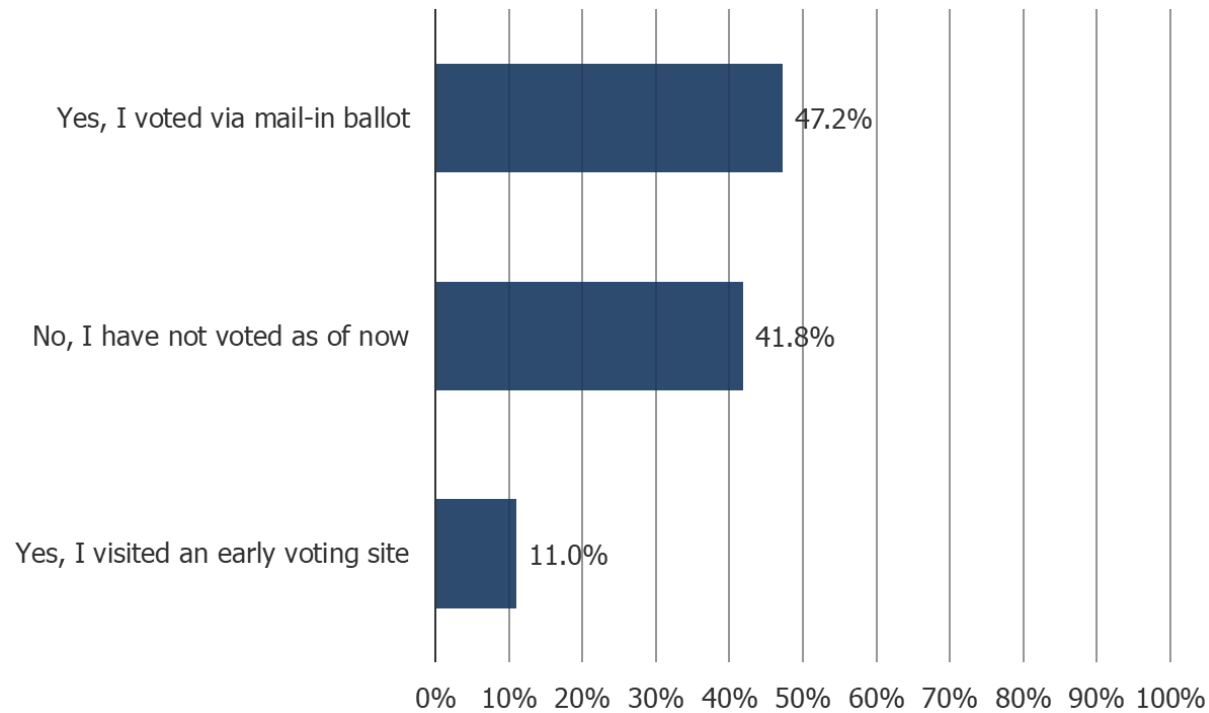
For the presidential election, who did you vote for?

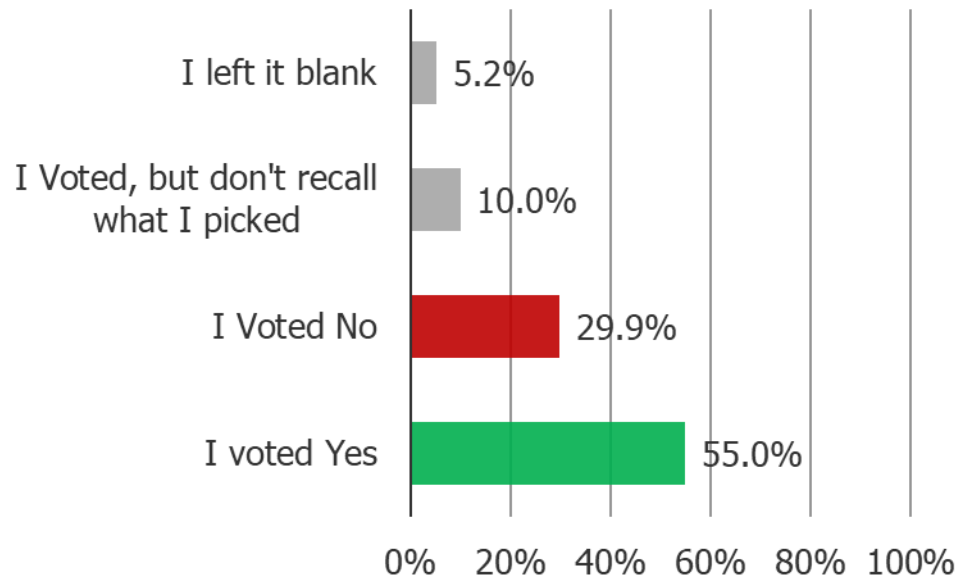*Posed to respondents who said they have voted already.*

PROPOSITION 15: INCREASES FUNDING SOURCES FOR PUBLIC SCHOOLS, COMMUNITY COLLEGES, AND LOCAL GOVERNMENT SERVICES BY CHANGING TAX ASSESSMENT OF COMMERCIAL AND INDUSTRIAL PROPERTY. INITIATIVE CONSTITUTIONAL AMENDMENT.

Taxes such properties based on current market value, instead of purchase price. Fiscal impact: increased property taxes on commercial properties worth more than $3 million providing $6.5 billion to $11.5 billion in new funding to local governments and schools.

How did you vote on Proposition 15?

Posed to respondents who said they have voted already.

I left it blank — 5.2%
I Voted, but don't recall what I picked — 10.0%
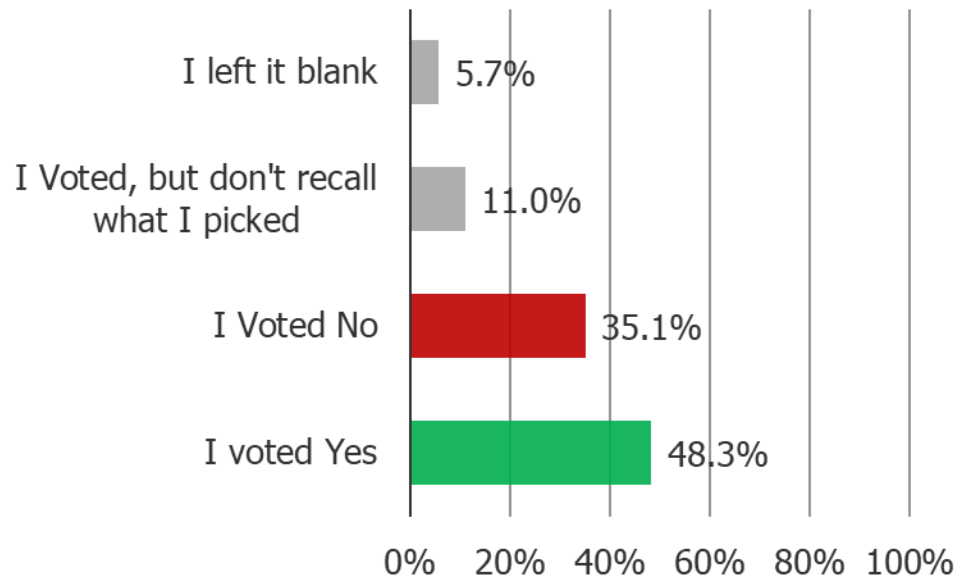I Voted No — 29.9%
I voted Yes — 55.0%

PROPOSITION 16: ALLOWS DIVERSITY AS A FACTOR IN PUBLIC EMPLOYMENT, EDUCATION AND CONTRACTING DECISIONS. LEGISLATIVE CONSTITUTIONAL AMENDMENT.

Permits government decision-making policies to consider race, sex, color, ethnicity, or national origin in order to address diversity by repealing constitutional provision prohibiting such policies. Fiscal Impact: No direct fiscal effect on state and local entities. The effects of the measure depend on the future choices of state and local government entities and are highly uncertain.

How did you vote on Proposition 16?

Posed to respondents who said they have voted already.

| Response	Percentage
I left it blank	5.7%
I Voted, but don't recall what I picked	11.0%
I Voted No	35.1%
I voted Yes	48.3%

PROPOSITION 21: EXPANDS LOCAL GOVERNMENTS' AUTHORITY TO ENACT RENT CONTROL ON RESIDENTIAL PROPERTY. INITIATIVE STATUTE.

Allows local governments to establish rent control on residential properties over 15 years old. Local limits on rate increases may differ from statewide limit. Fiscal Impact: Overall, a potential reduction in state and local revenues in the high tens of millions of dollars per year over time. Depending on actions by local communities, revenue losses could be less or more.

How did you vote on Proposition 21?

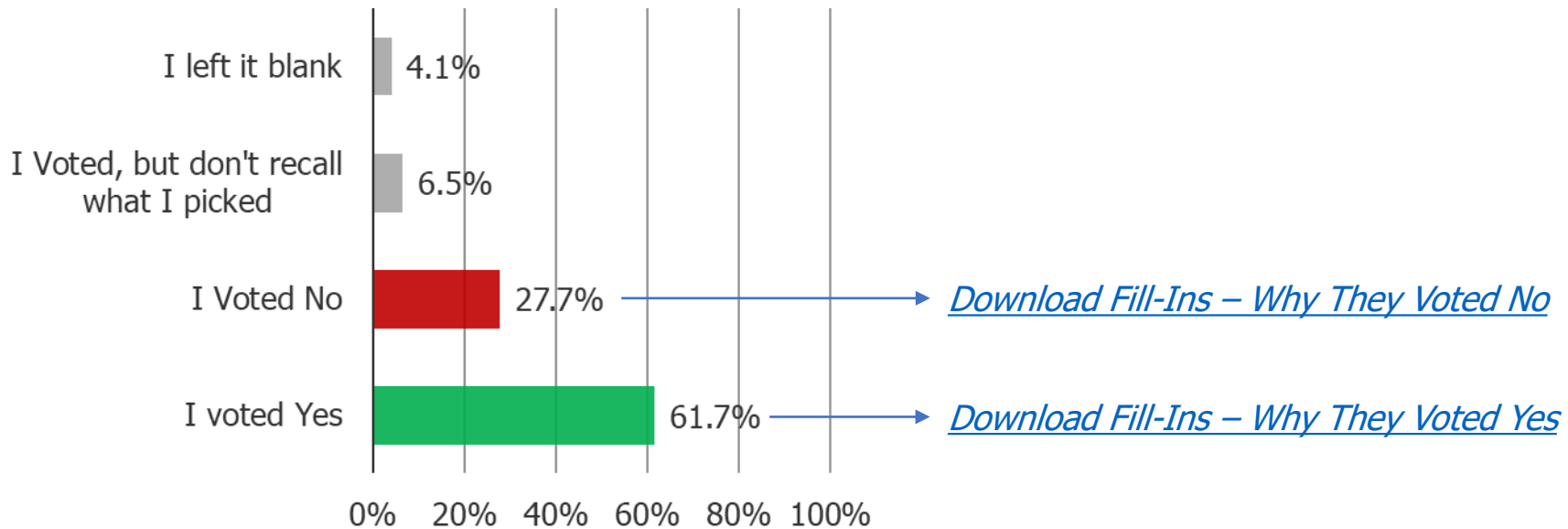*Posed to respondents who said they have voted already.*
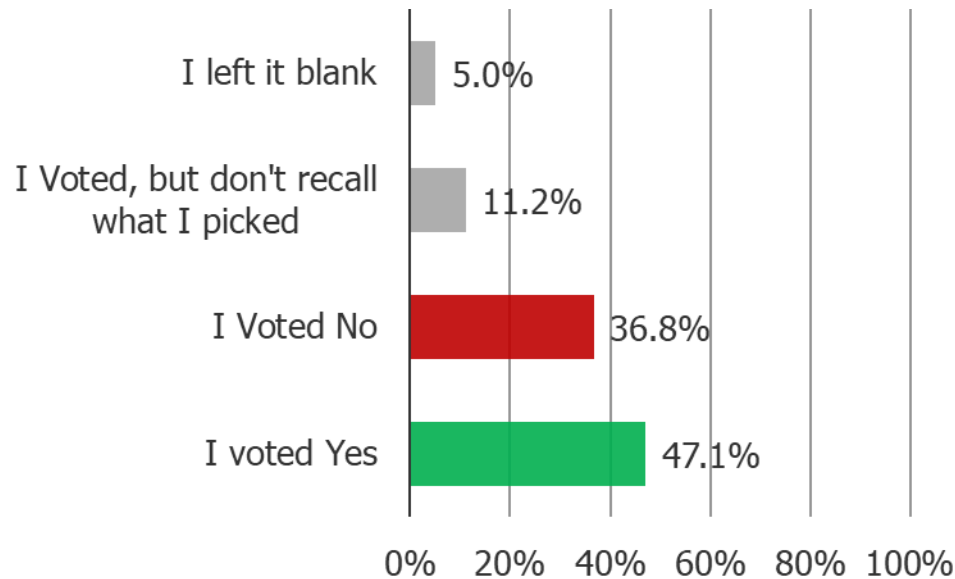
PROPOSITION 22: EXEMPTS APP-BASED TRANSPORTATION AND DELIVERY COMPANIES FROM PROVIDING EMPLOYEE BENEFITS TO CERTAIN DRIVERS. INITIATIVE STATUTE.
Classifies app-based drivers as "independent contractors," instead of "employees," and provides independent-contractor drivers other compensation, unless certain criteria are met. Fiscal Impact: Minor increase in state income taxes paid by rideshare and delivery company drivers and investors.

How did you vote on Proposition 22?

*Posed to respondents who said they have voted already.*

Response	Percentage
I left it blank	4.1%
I Voted, but don't recall what I picked	6.5%
I Voted No	27.7% → *Download Fill-Ins – Why They Voted No*
I voted Yes	61.7% → *Download Fill-Ins – Why They Voted Yes*

0% 20% 40% 60% 80% 100%

II

- ☐ **Voted Already**
- ☐ **Has Not Voted Yet – Likely Voters**
- ☐ **Opinions Toward App-Based Drivers and How They Should Be Classified**
- ☐ **Ride Sharing and Food Delivery App Usage**
- ☐ **Voting in Prior Years**
- ☐ **Demographics**

On November 3rd, California voters will choose a President and also will vote on several statewide ballot measures. How likely are you to vote in the election?
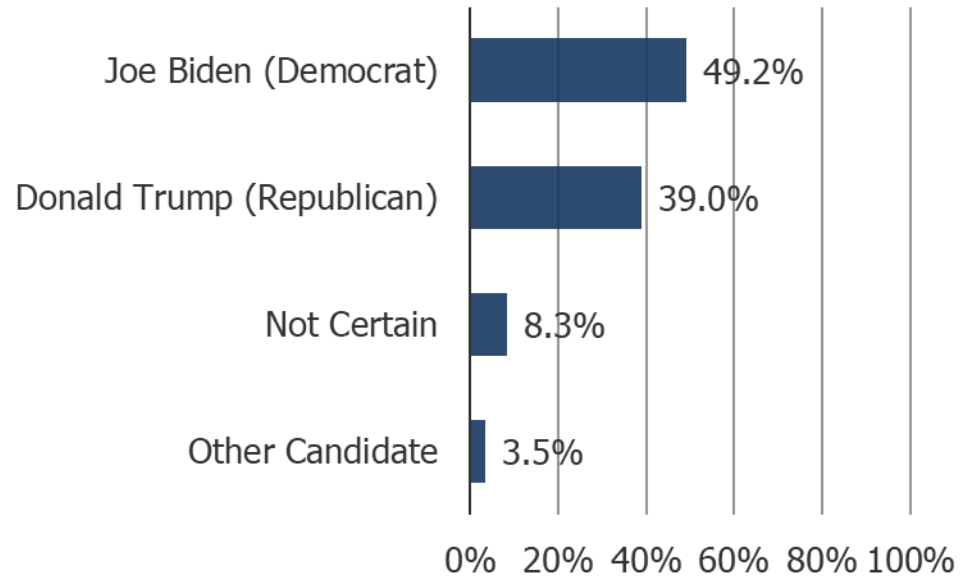
Posed to respondents who have not voted.

Very unlikely	9.1%
Unlikely	9.1%
Somewhat Likely	11.5%
Likely	12.2%
Very likely	58.1%
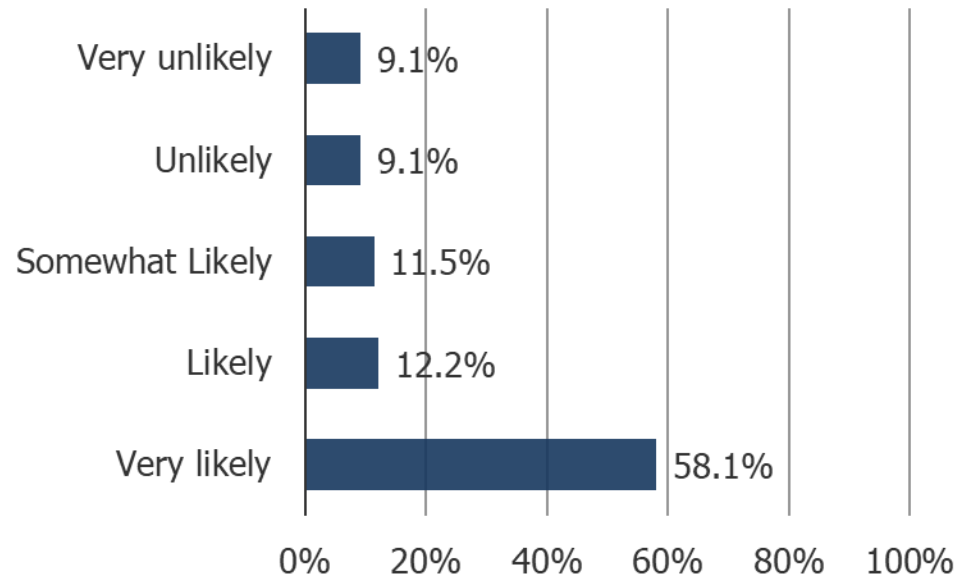
If we asked you to express how likely you are to vote in a percentage in which 0% means you are certain you will not vote and 100% means you are certain you will vote, which would best describe you?

Posed to respondents who have not voted: Average Response: 75%

For the presidential election, who will you vote for?

Posed to likely voters.

|	
Joe Biden (Democrat)	49.2%
Donald Trump (Republican)	39.0%
Not Certain	8.3%
Other Candidate	3.5%

0% 20% 40% 60% 80% 100%

PROPOSITION 15: INCREASES FUNDING SOURCES FOR PUBLIC SCHOOLS, COMMUNITY COLLEGES, AND LOCAL GOVERNMENT SERVICES BY CHANGING TAX ASSESSMENT OF COMMERCIAL AND INDUSTRIAL PROPERTY. INITIATIVE CONSTITUTIONAL AMENDMENT.

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**How will you vote on Proposition 15?**

Posed to likely voters.
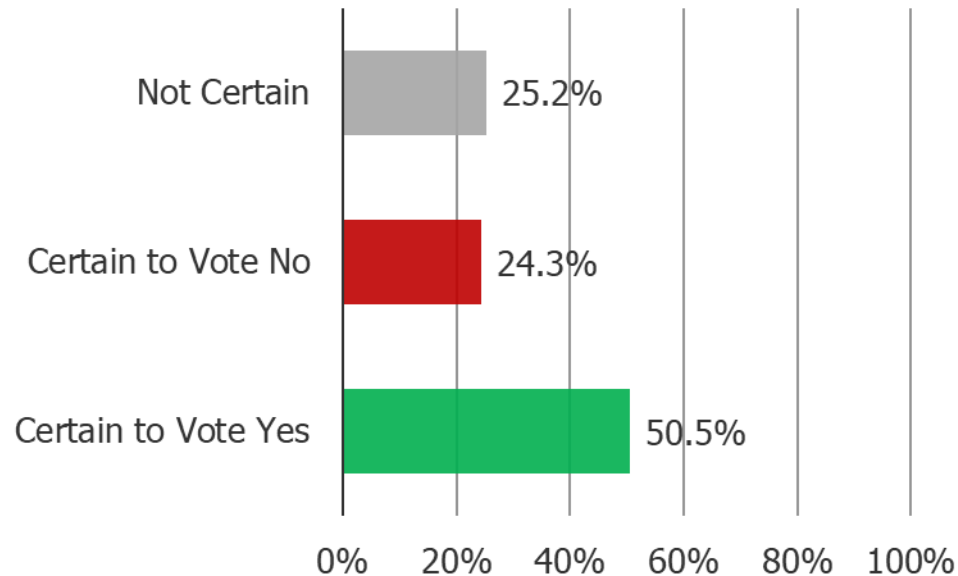
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How will you vote on Proposition 16?

Posed to likely voters.
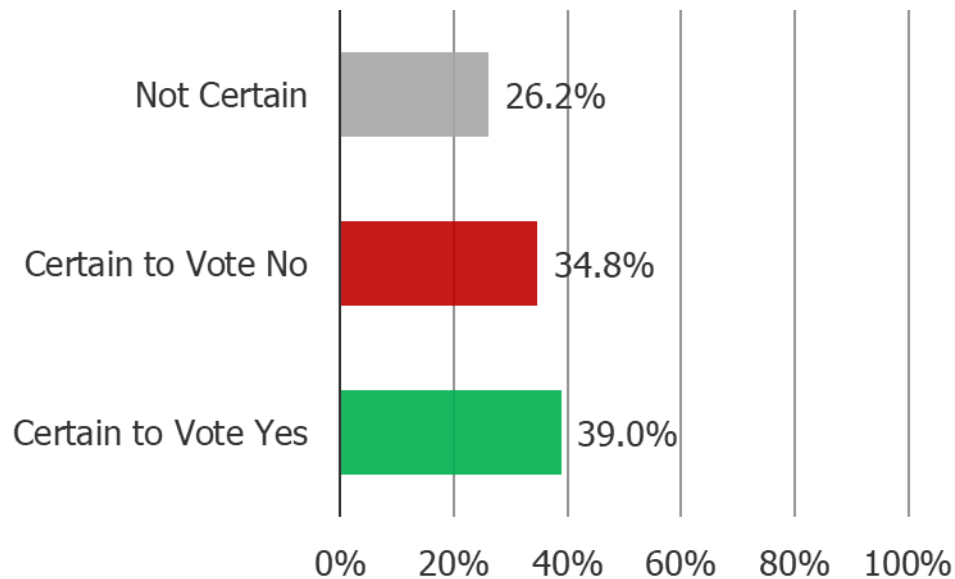
Source: Bespoke Market Intelligence Analysis

PROPOSITION 21: EXPANDS LOCAL GOVERNMENTS' AUTHORITY TO ENACT RENT CONTROL ON RESIDENTIAL PROPERTY. INITIATIVE STATUTE.

Allows local governments to establish rent control on residential properties over 15 years old. Local limits on rate increases may differ from statewide limit. Fiscal Impact: Overall, a potential reduction in state and local revenues in the high tens of millions of dollars per year over time. Depending on actions by local communities, revenue losses could be less or more.

How will you vote on Proposition 21?
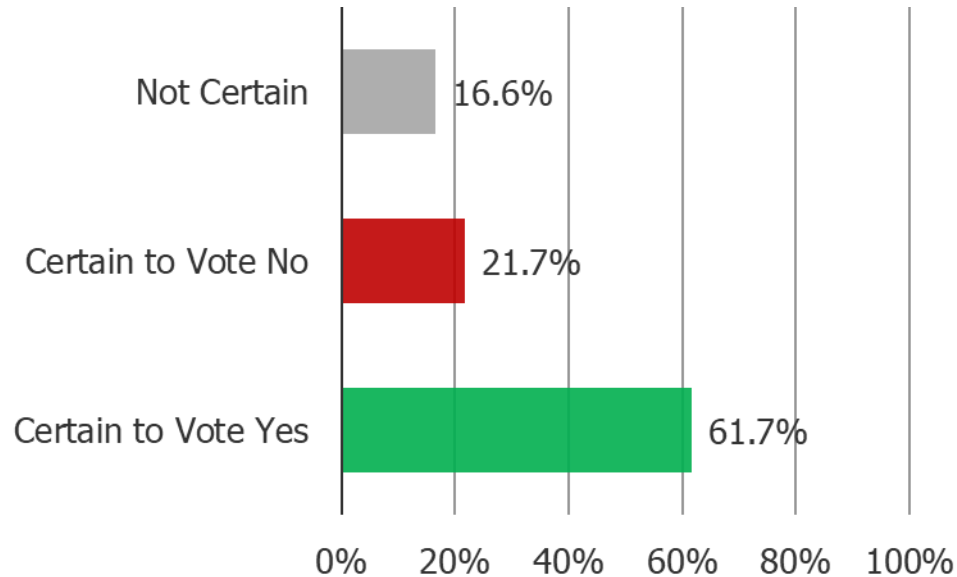
Posed to likely voters.
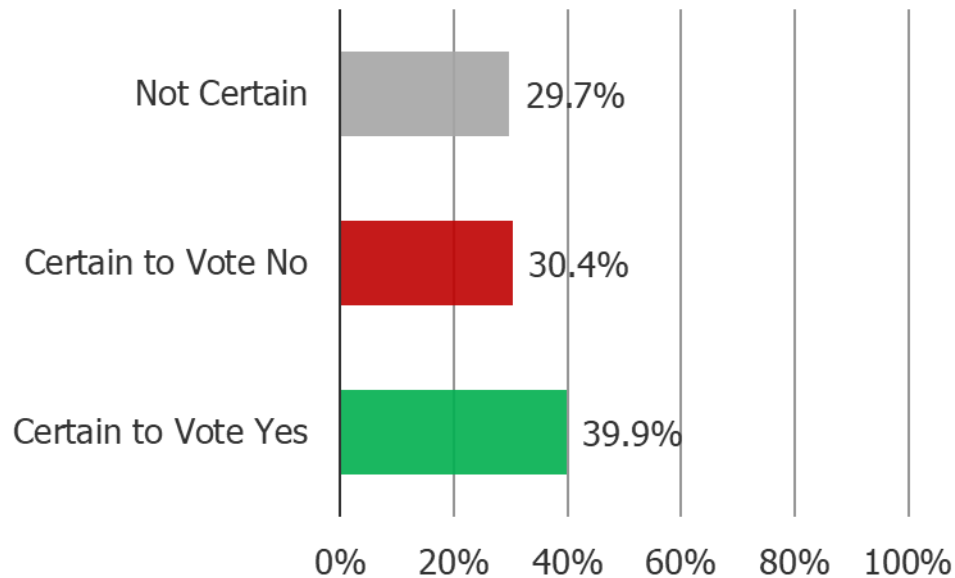
PROPOSITION 22: EXEMPTS APP-BASED TRANSPORTATION AND DELIVERY COMPANIES FROM PROVIDING EMPLOYEE BENEFITS TO CERTAIN DRIVERS. INITIATIVE STATUTE.
Classifies app-based drivers as "independent contractors," instead of "employees," and provides independent-contractor drivers other compensation, unless certain criteria are met. Fiscal Impact: Minor increase in state income taxes paid by rideshare and delivery company drivers and investors.

How will you vote on Proposition 22?

Posed to likely voters.

You mentioned that as of now you are not certain how you would vote on Prop 22. If you were filling out your ballot right now, would you be more likely to:

For Reference:
PROPOSITION 22: EXEMPTS APP-BASED TRANSPORTATION AND DELIVERY COMPANIES FROM PROVIDING EMPLOYEE BENEFITS TO CERTAIN DRIVERS. INITIATIVE STATUTE.
Classifies app-based drivers as "independent contractors," instead of "employees," and provides independent-contractor drivers other compensation, unless certain criteria are met. Fiscal Impact: Minor increase in state income taxes paid by rideshare and delivery company drivers and investors.

Posed to likely voters who said they are uncertain on how they would vote regarding Prop 22.
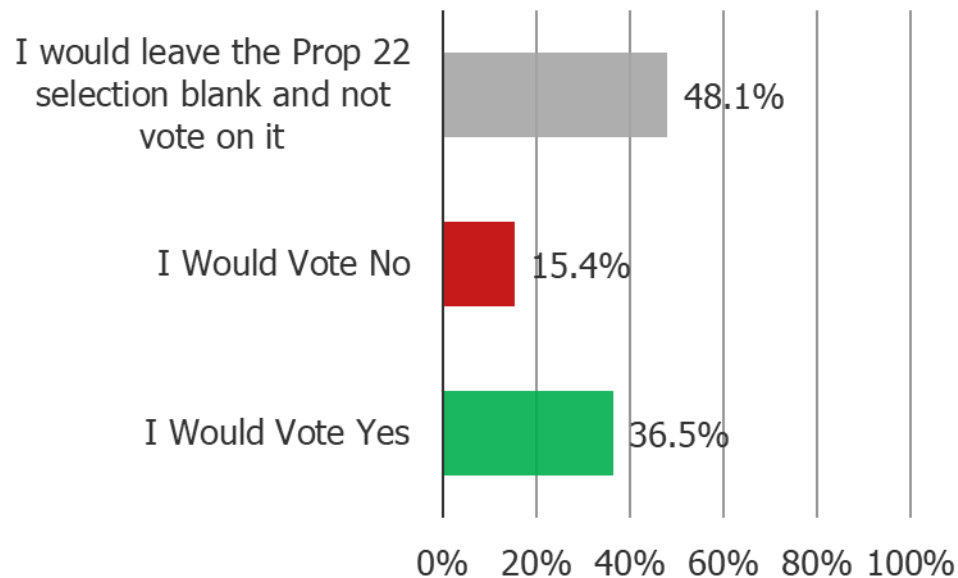

N = 52

III

- ❑ **Voted Already**

- ❑ **Has Not Voted Yet – Likely Voters**

- ❑ **Opinions Toward App-Based Drivers and How They Should Be Classified** ❑

- ❑ **Ride Sharing and Food Delivery App Usage**
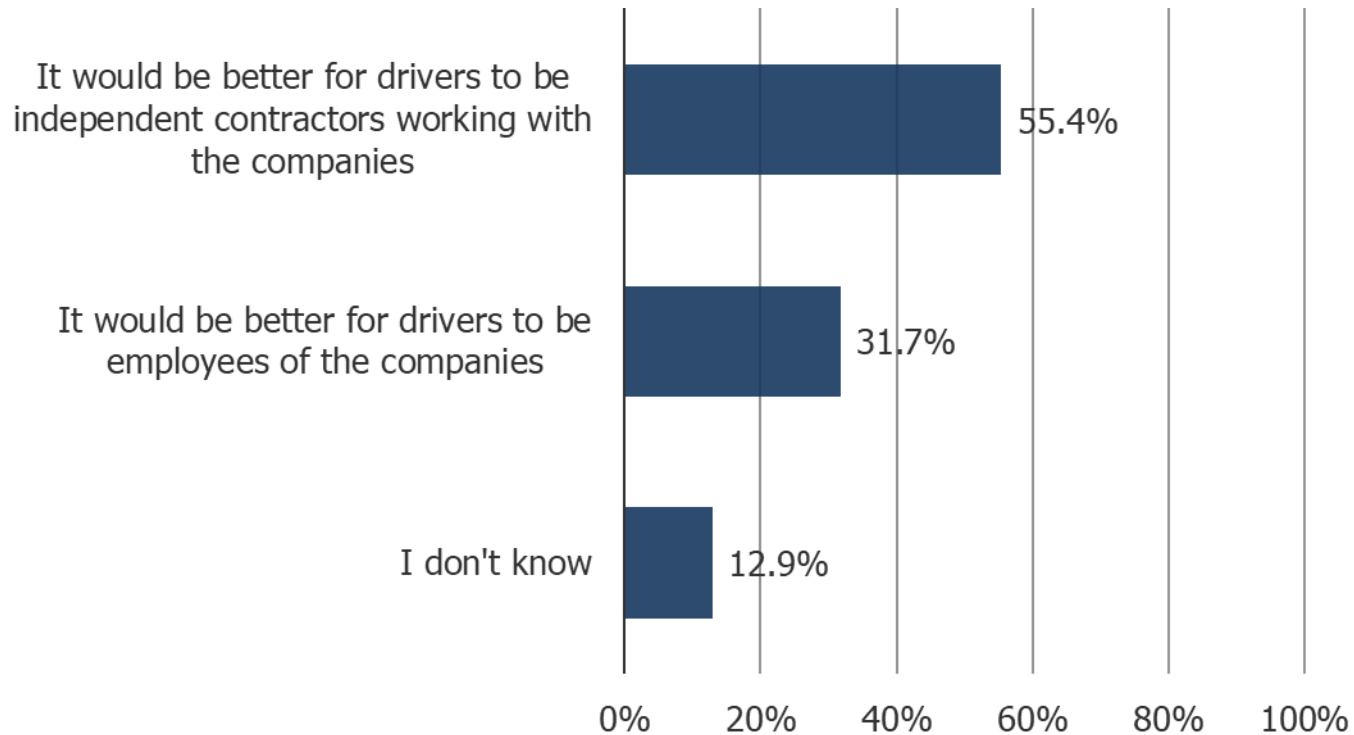
- ❑ **Voting in Prior Years**

- ❑ **Demographics**

In your opinion, should app-based drivers for companies like Uber, DoorDash, Lyft, Postmates, Instacart and others be independent contractors or employees of the companies?
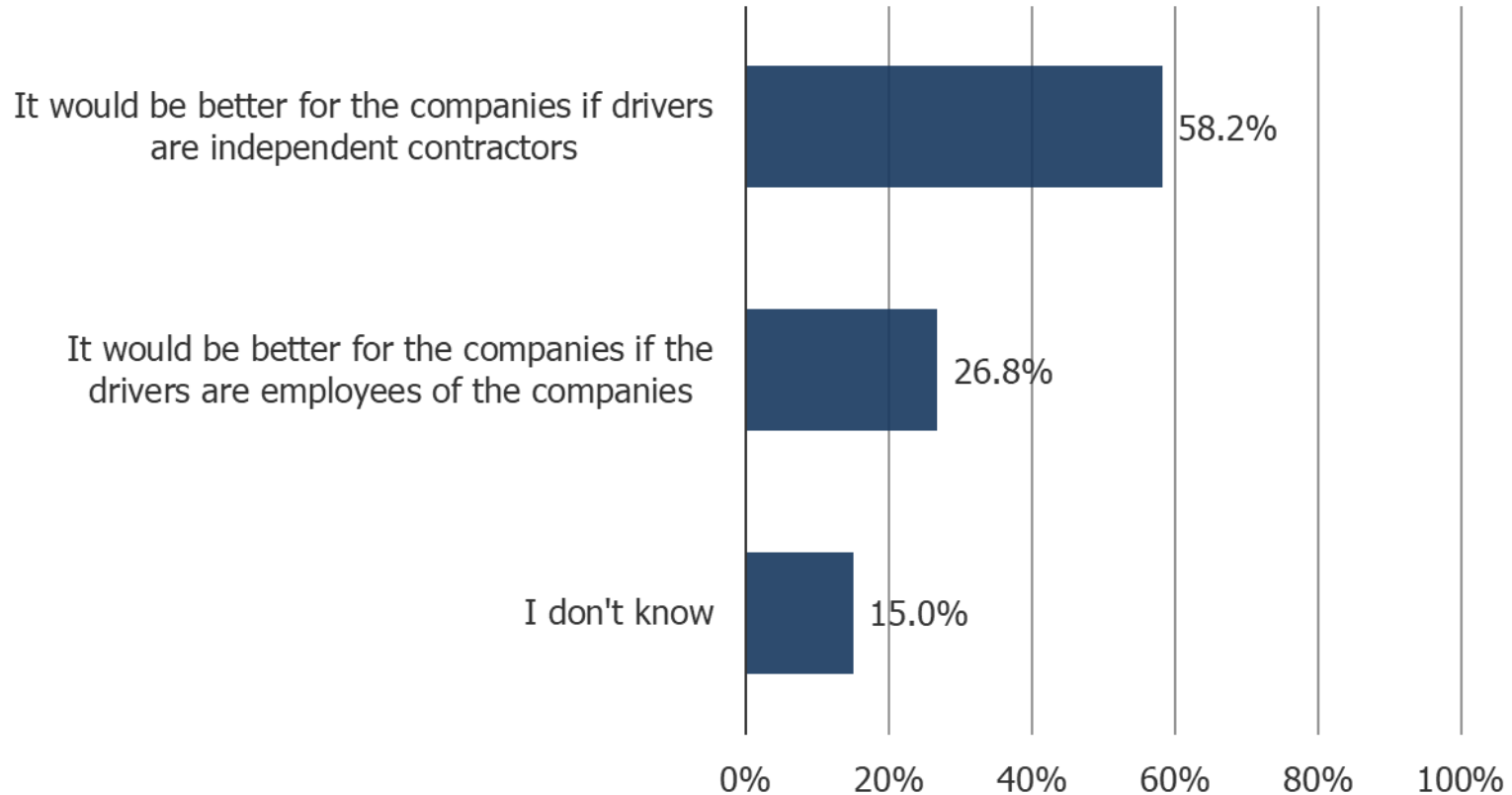
Posed to all respondents.
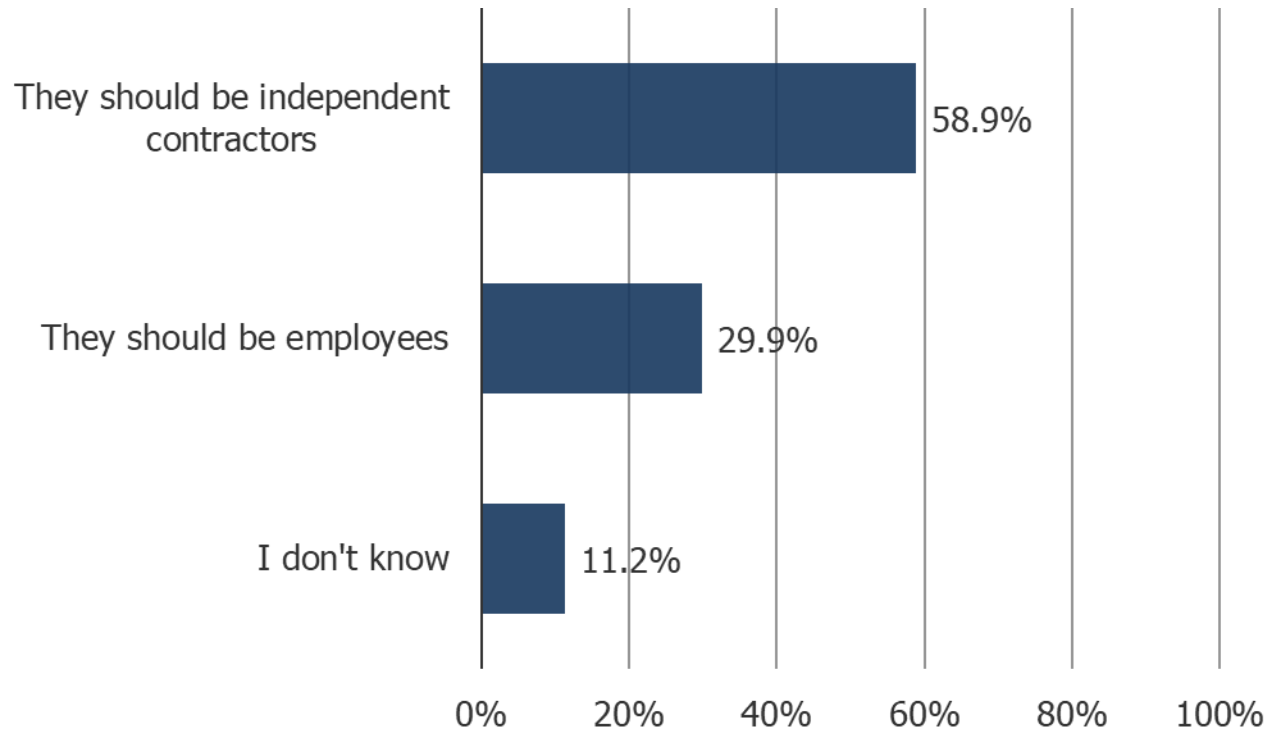
Would it be better for the drivers if they were considered independent contractors or employees?

Posed to all respondents.

It would be better for drivers to be independent contractors working with the companies — 55.4%

It would be better for drivers to be employees of the companies — 31.7%
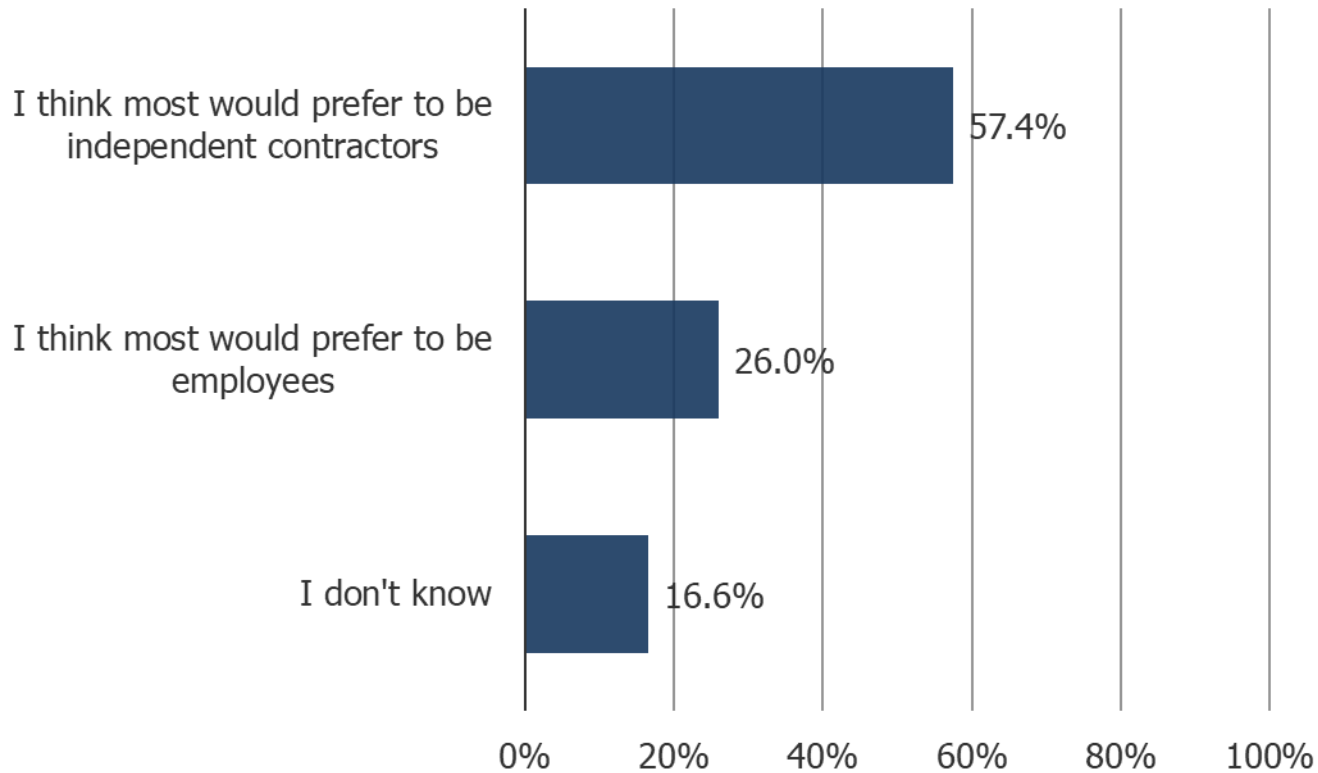
I don't know — 12.9%

Would it be better for companies like Uber, Lyft, DoorDash, Instacart, Postmates, and others if drivers are considered independent contractors or employees?
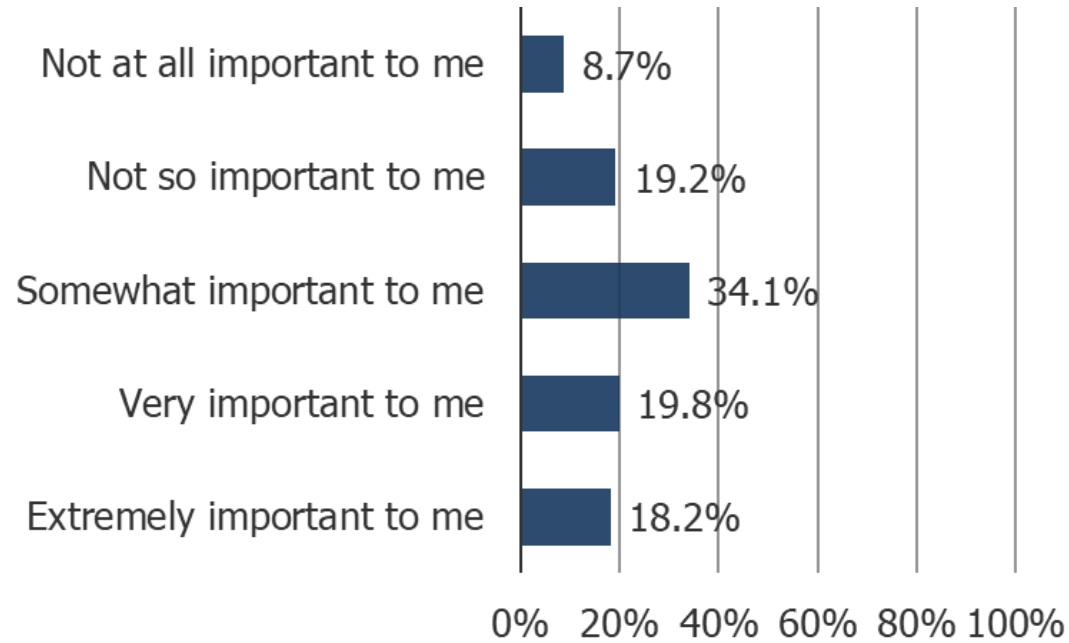
Posed to all respondents.

What do you think drivers for companies like Uber, Lyft, DoorDash, Postmates, Instacart, and others prefer?
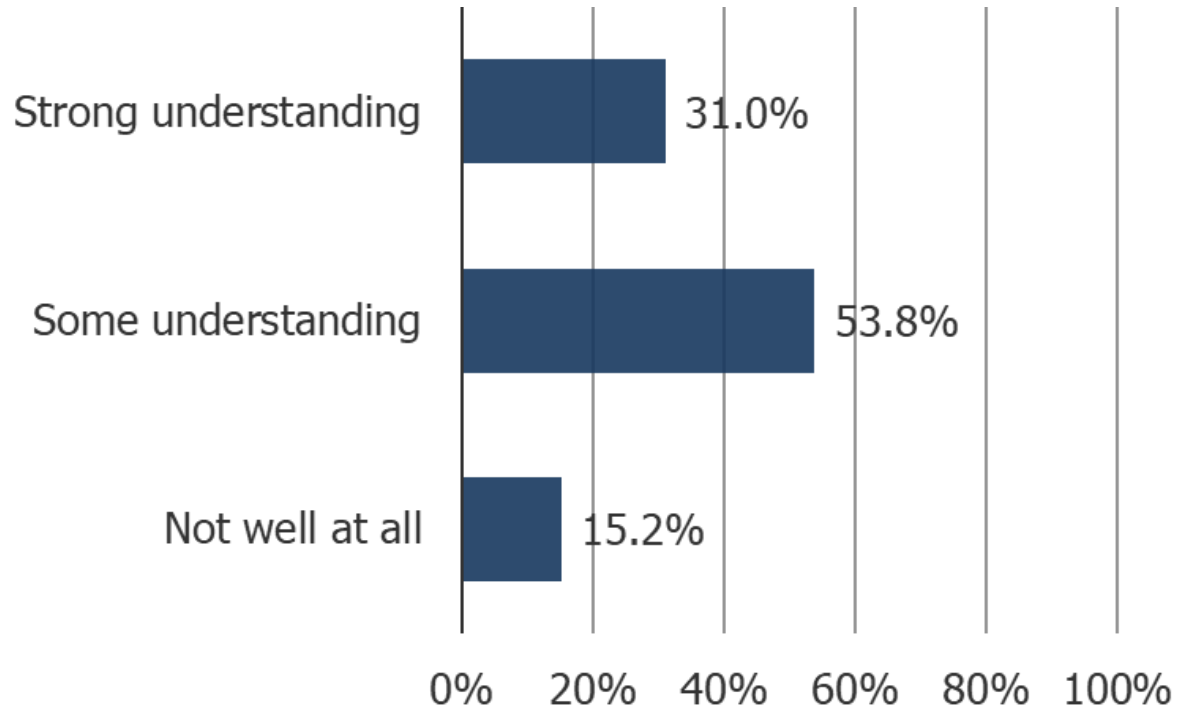
Posed to all respondents.

How important to you is the issue of whether app-based drivers are treated as independent contractors or employees?

Posed to all respondents.

| Response	Percentage
Not at all important to me	8.7%
Not so important to me	19.2%
Somewhat important to me	34.1%
Very important to me	19.8%
Extremely important to me	18.2%

How well do you feel you understand the positives and negatives of app based drivers for companies like Uber, Lyft, DoorDash, Postmates, Instacart, etc being considered independent contractors or employees?
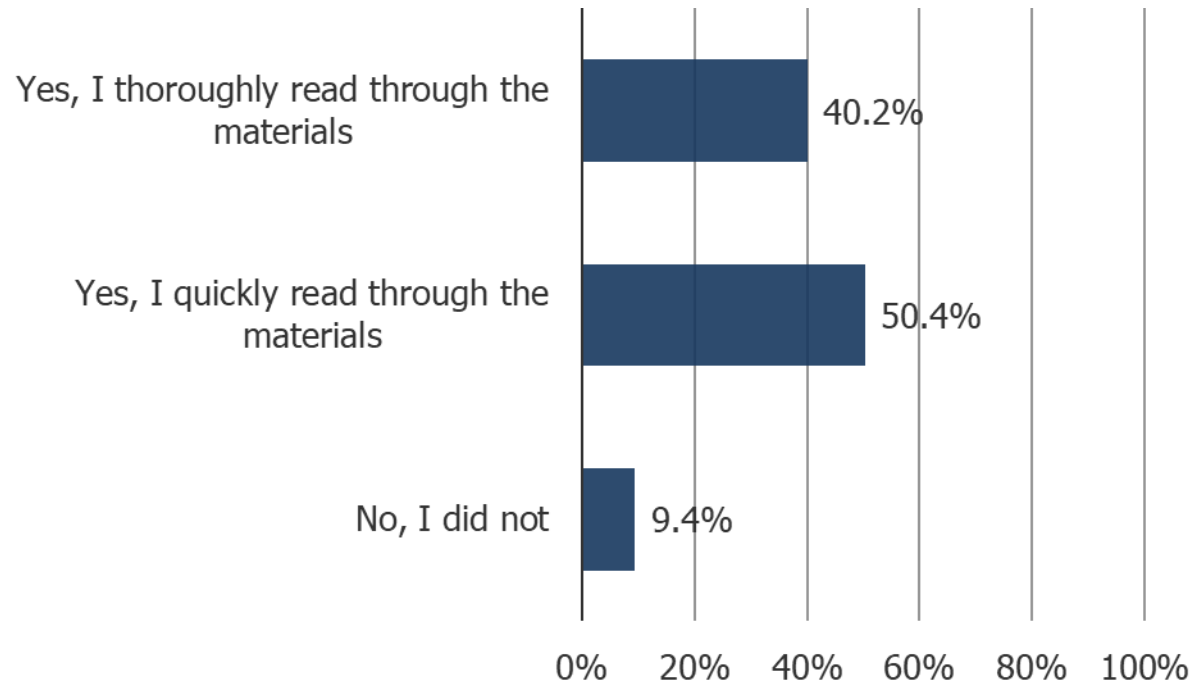
Posed to all respondents.

Did you receive materials in the mail from the state of California explaining the propositions in the general election ballot in advance of the election?

Posed to all respondents.
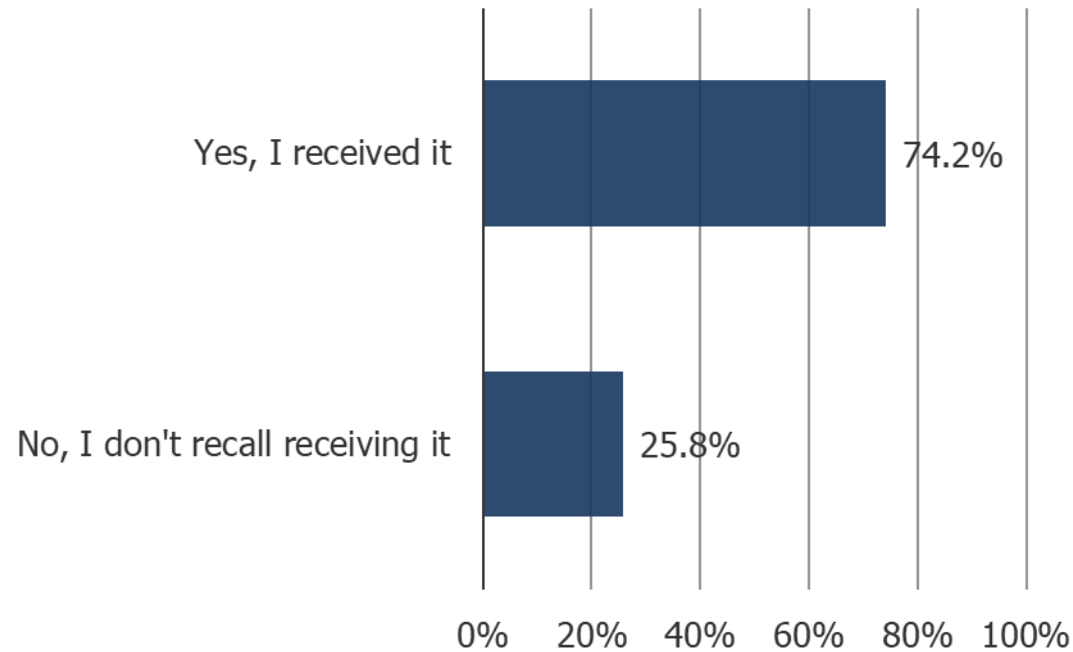
Did you read through the materials at all?

Posed to respondents who received materials in the mail on Propositions on the ballot.
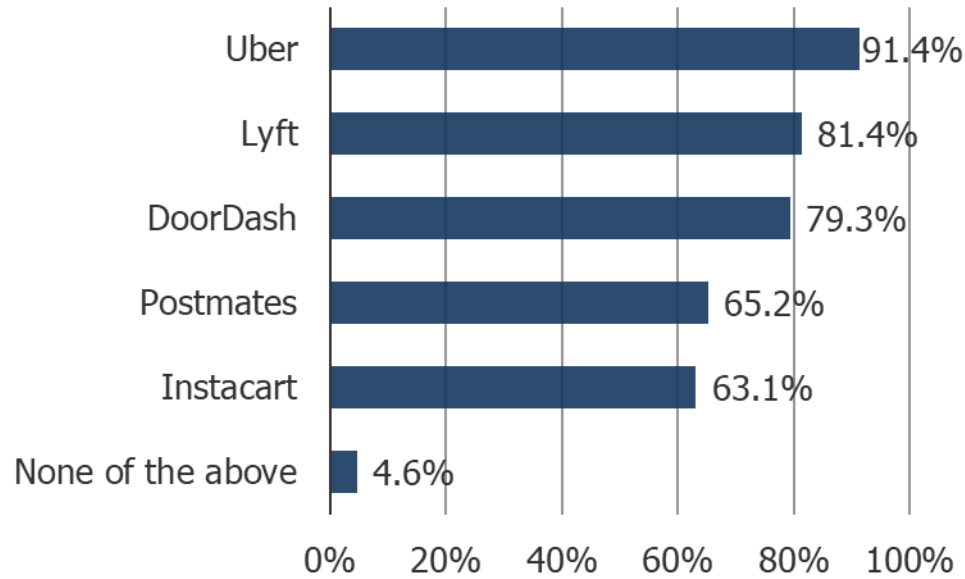
IV

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- ❑ **Has Not Voted Yet – Likely Voters**

- ❑ **Opinions Toward App-Based Drivers and How They Should Be Classified**

- ❑ **Ride Sharing and Food Delivery App Usage**

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- ❑ **Demographics**

Are you aware of any of the following companies? Select ALL that apply

Posed to all respondents.

Company	Percentage
Uber	91.4%
Lyft	81.4%
DoorDash	79.3%
Postmates	65.2%
Instacart	63.1%
None of the above	4.6%

Do you regularly or occasionally use the following companies? Select ALL that apply
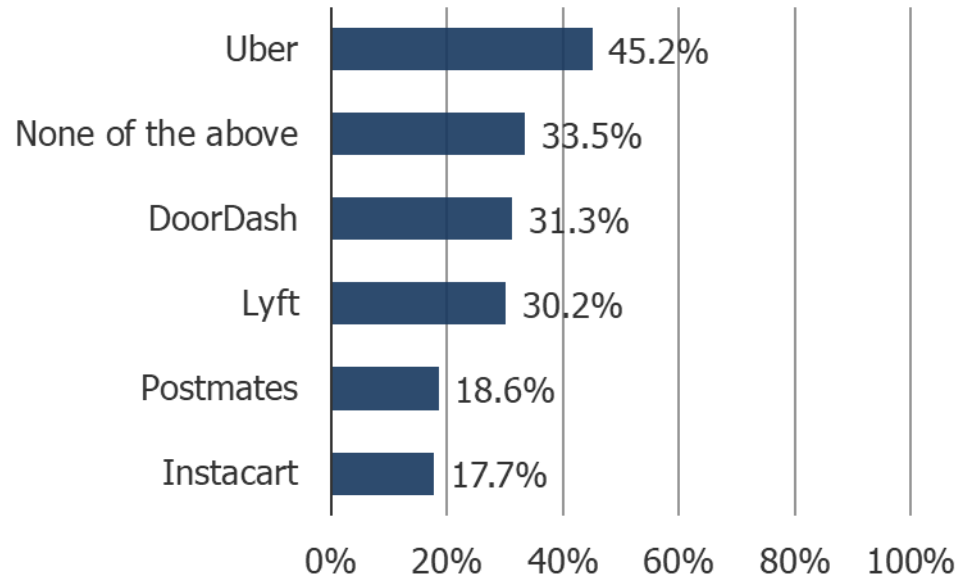
Posed to all respondents.

| Company	Percentage
Uber	45.2%
None of the above	33.5%
DoorDash	31.3%
Lyft	30.2%
Postmates	18.6%
Instacart	17.7%

V

- ❑ **Voted Already**
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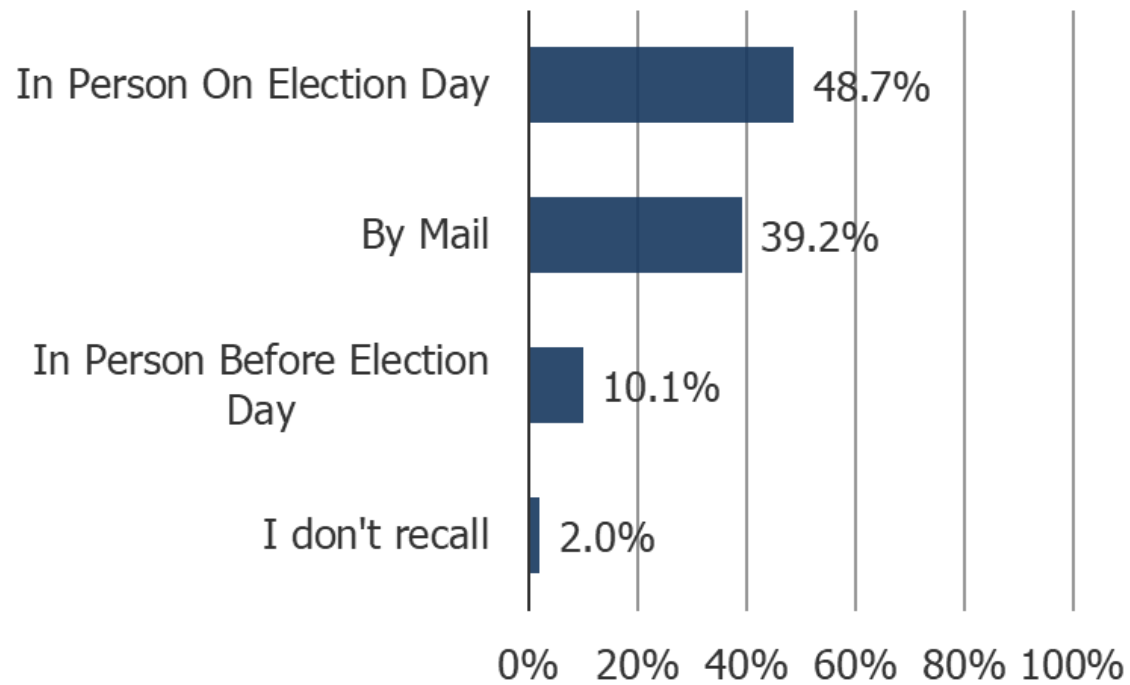- ❑ **Voting in Prior Years**
- ❑ **Demographics**

Did you vote in the general elections in which a president was being elected in the following election years?

Posed to all respondents (% who said yes).
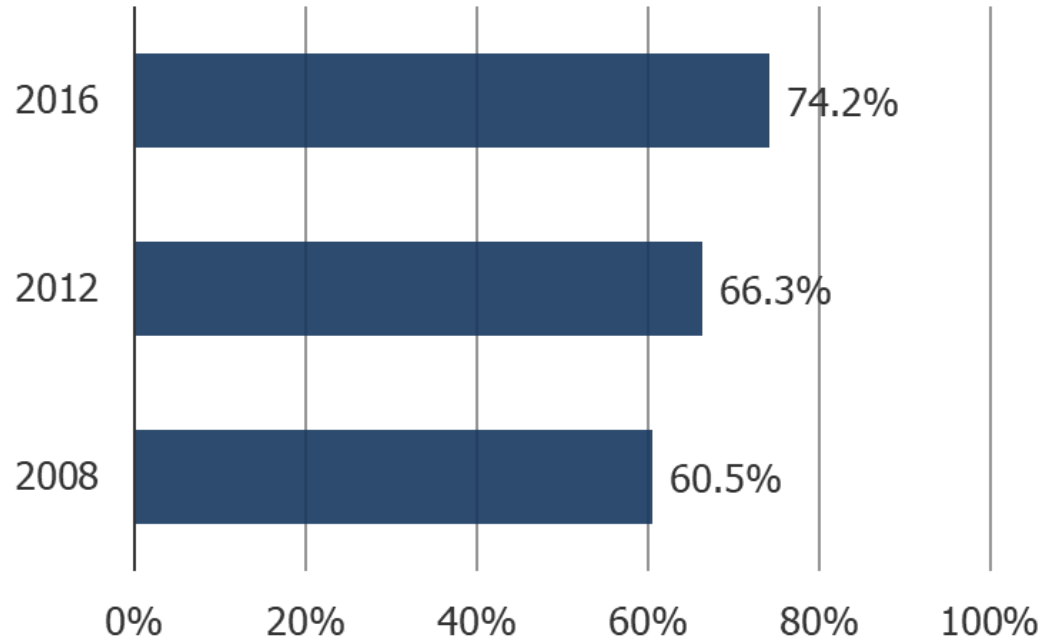
How did you vote in 2016?

Posed to respondents who voted in 2016.
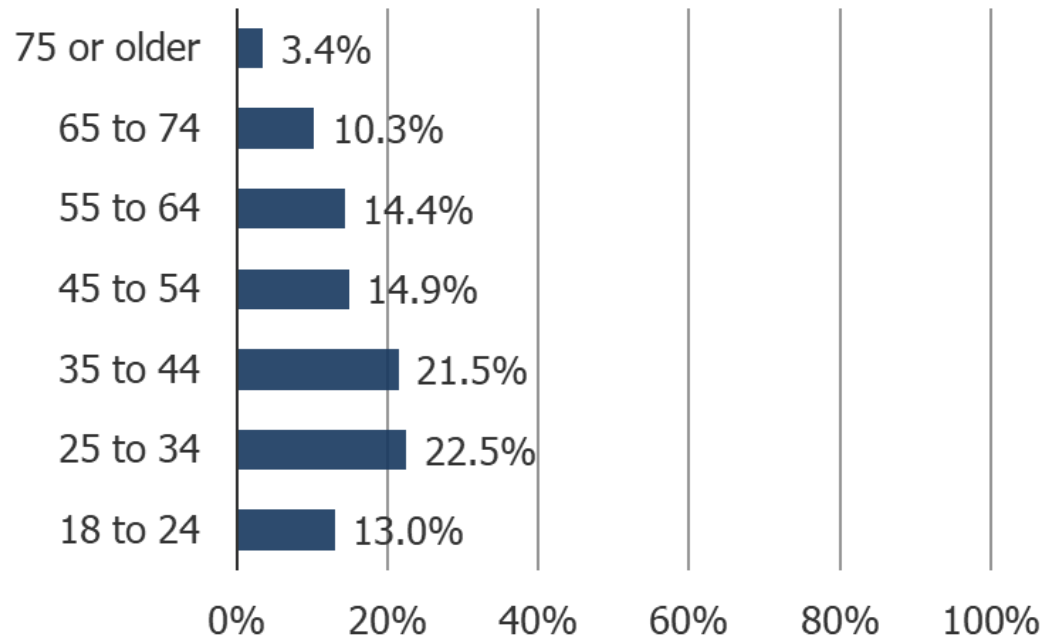
V

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What is your age?

Posed to all respondents.

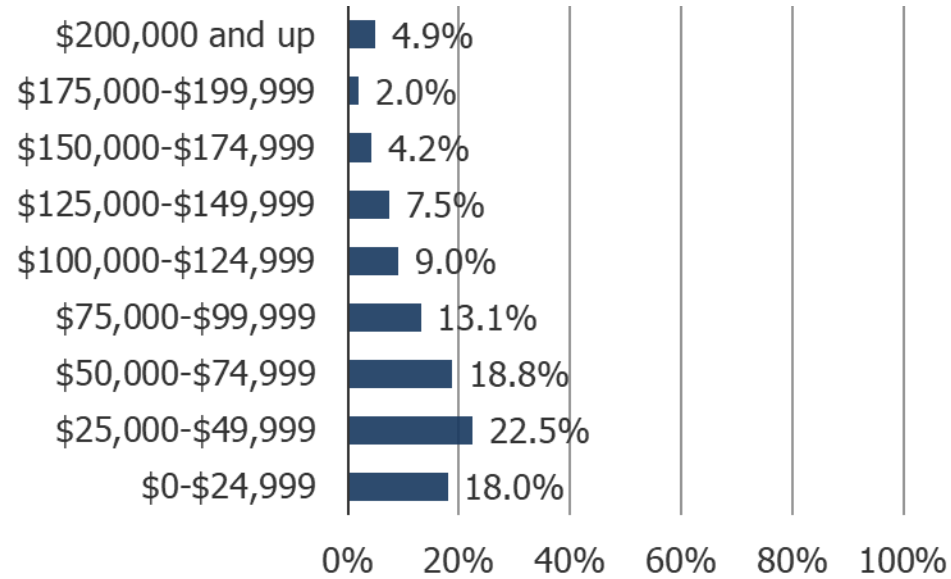| Age	Percentage
75 or older	3.4%
65 to 74	10.3%
55 to 64	14.4%
45 to 54	14.9%
35 to 44	21.5%
25 to 34	22.5%
18 to 24	13.0%

What is your gender?

Posed to all respondents.
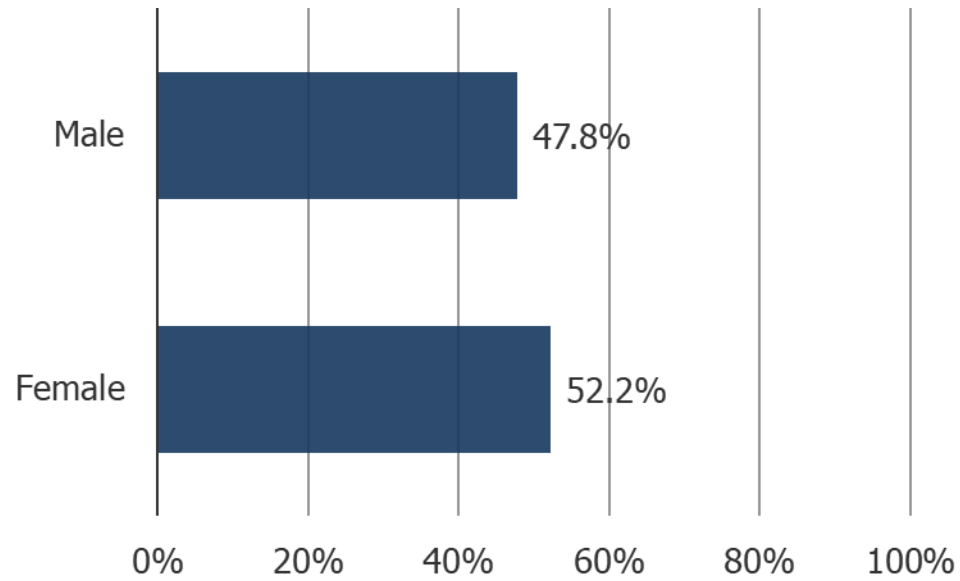
What is your approximate average household income??

Posed to all respondents.

$200,000 and up — 4.9%
$175,000-$199,999 — 2.0%
$150,000-$174,999 — 4.2%
$125,000-$149,999 — 7.5%
$100,000-$124,999 — 9.0%
$75,000-$99,999 — 13.1%
$50,000-$74,999 — 18.8%
$25,000-$49,999 — 22.5%
$0-$24,999 — 18.0%

What is your race or ethnicity?

Posed to all respondents.

White — 68.0%
Asian — 14.4%
Some other race — 8.9%
Black or African American — 7.0%
Native American or Alaska Native — 1.4%
Native Hawaiian or other Pacific Islander — 0.2%

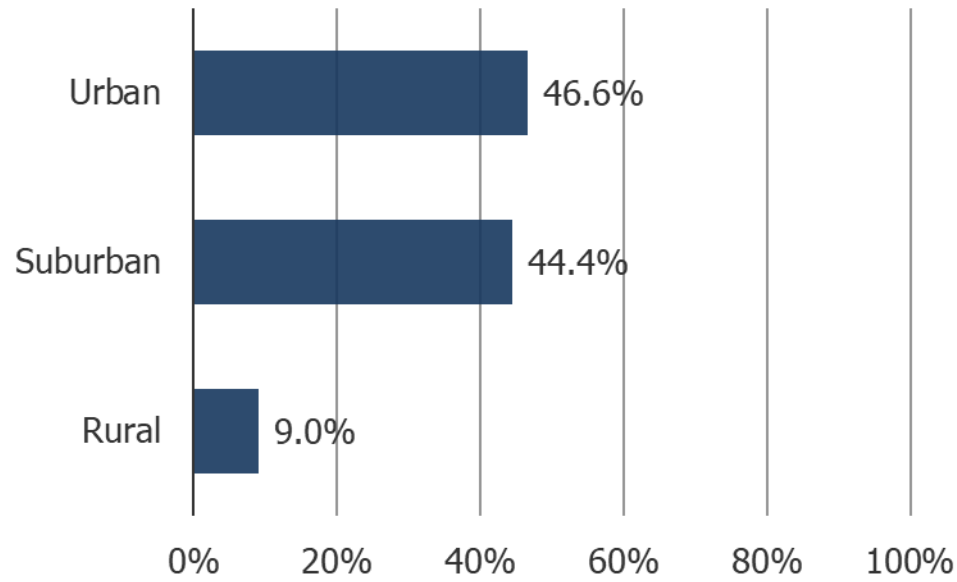Source: Bespoke Market Intelligence Analysis
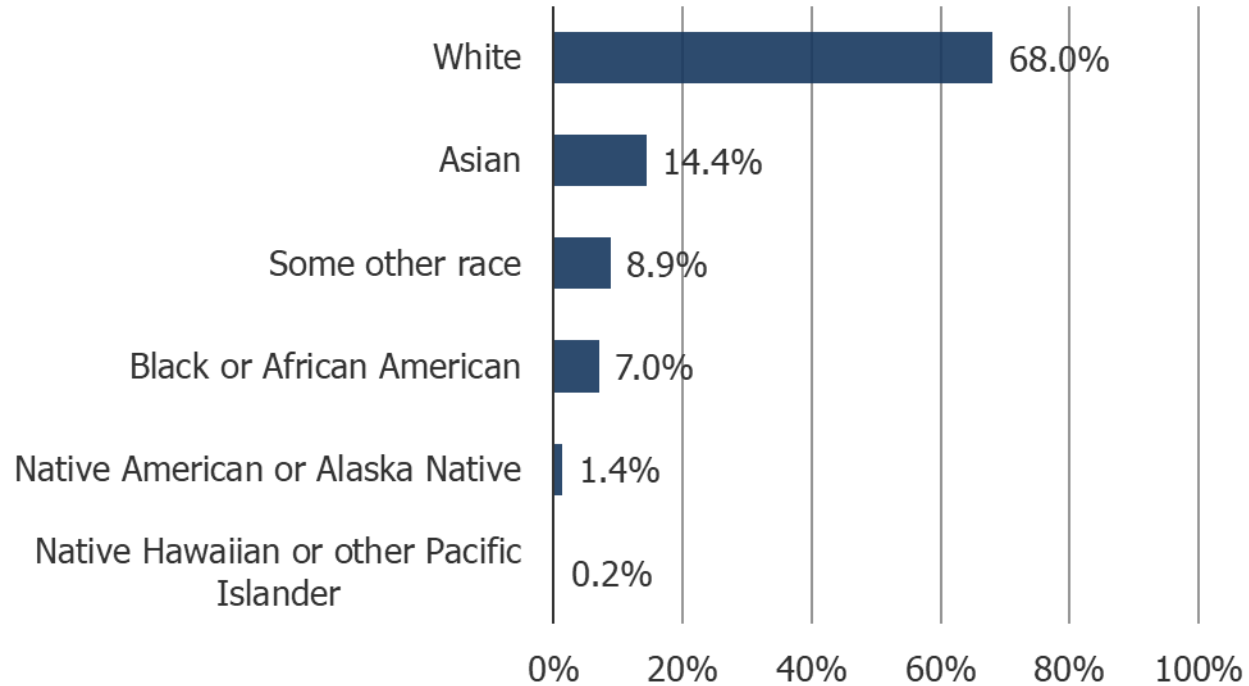
Are you of Hispanic, Latino, or Spanish origin?
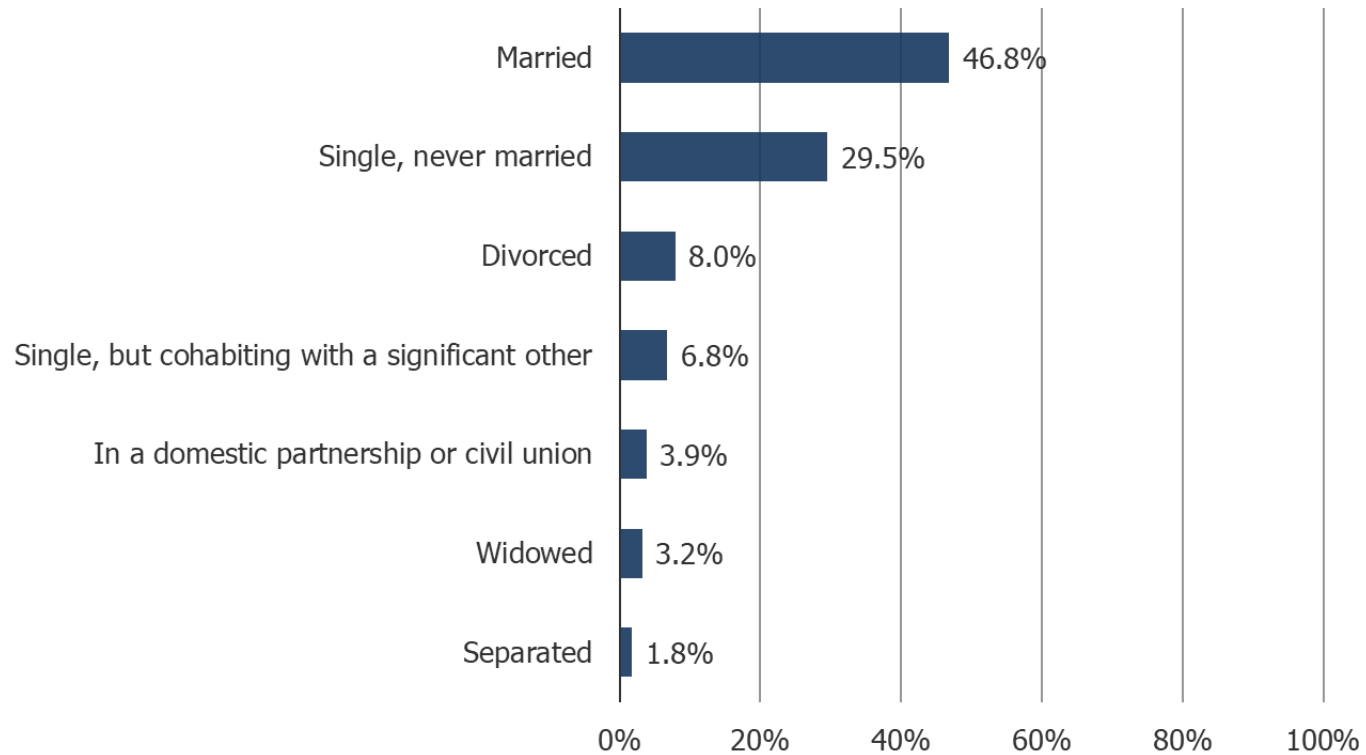
Posed to all respondents.
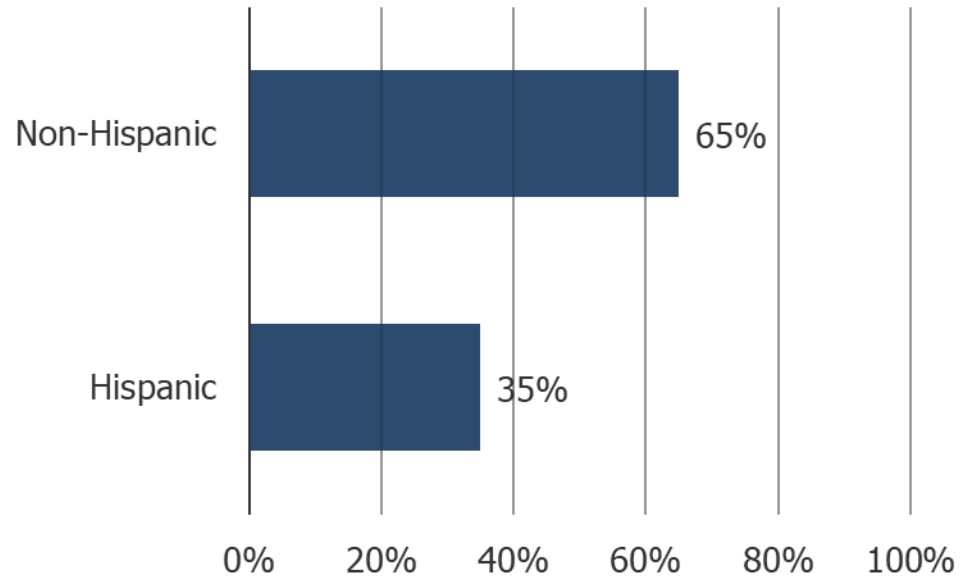
Do you live in an urban, suburban, or rural area?

Posed to all respondents.

Which of the following best describes your current relationship status?

Posed to all respondents.

Relationship Status	Percentage
Married	46.8%
Single, never married	29.5%
Divorced	8.0%
Single, but cohabiting with a significant other	6.8%
In a domestic partnership or civil union	3.9%
Widowed	3.2%
Separated	1.8%

Source: Bespoke Market Intelligence Analysis

Which of the following categories best describes your employment status?

Posed to all respondents.

Category	Percentage
Employed, working full-time	47.0%
Employed, working part-time	14.9%
Retired	14.6%
Not employed, looking for work	11.4%
Not employed, NOT looking for work	7.9%
Disabled, not able to work	4.2%
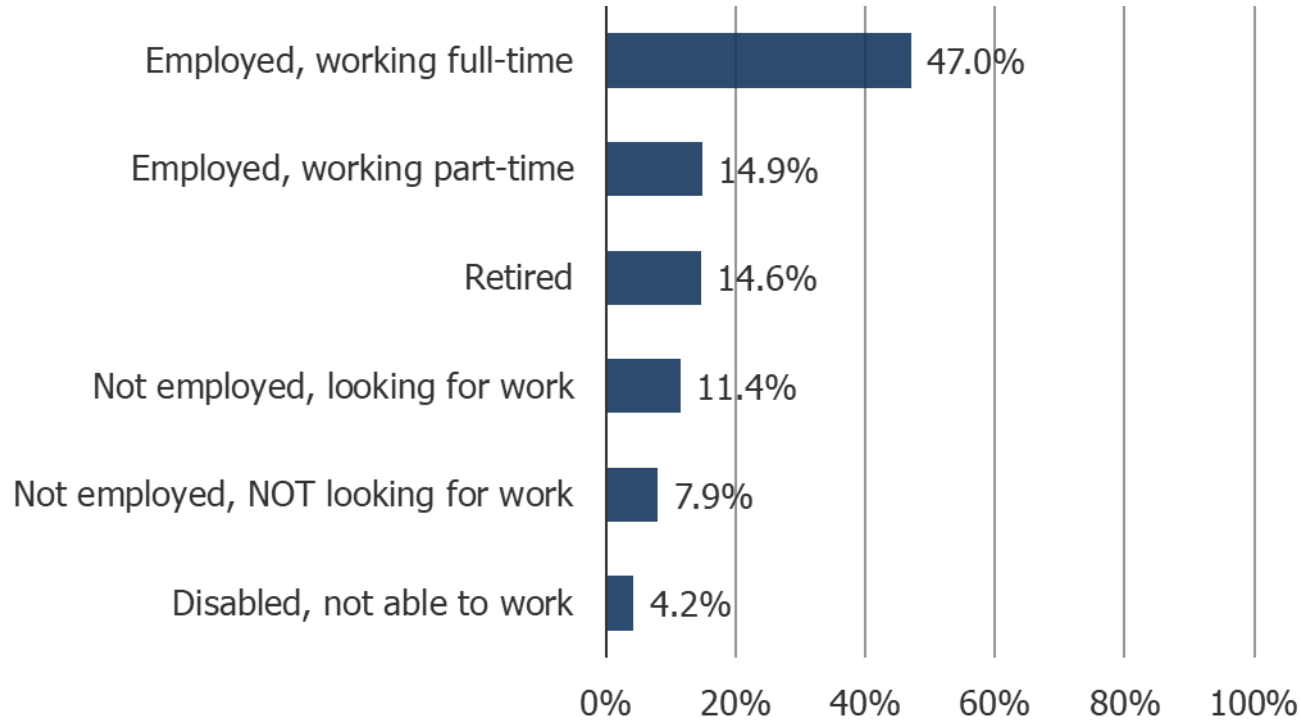
In politics today, do you consider yourself a Republican, Democrat, or Independent?

Posed to all respondents.

Category	Percentage
Democrat	42.2%
Republican	30.5%
Independent	21.7%
I don't know	5.6%