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**CHAMBER  
OF PROGRESS**

# CIVIC INNOVATION

Polling Presentation

JUNE 2022

# KEY FINDINGS

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- 1. COVID-19 impacted the frequency adults utilize specific technology services and apps.** A fifth of adults say they use a telemedicine app (21%), an app to deliver food (20%), and an app to deliver groceries (20%) *more often* now compared to before the COVID-19 pandemic
- 2. A plurality of adults (43%) are opposed to increased fees for their delivery services that would increase revenue for restaurants and grocery stores by raising the total cost of delivery for consumers, however, support is higher among those who use these services.** Among those who have used apps to deliver groceries or food in the past 12 months, 42% support the proposed delivery service regulations compared to 45% who oppose the regulation.
- 3. Nearly half (48%) of adults think our wage and benefit system doesn't sufficiently support independent contractors and needs to be updated.** When it comes to rideshare and delivery services specifically, adults are divided on whether these services *should* (37%) or *should not* (37%) be required to employ drivers as full-time employees.
- 4. Adults are more likely to be supportive (55%) than worried (34%) about the availability of new technologies and services in their community, although adults are more excited about the availability of some new technologies than others.** Of the four tested technologies, adults are *most likely* to be excited about using drones that deliver packages and seeing this technology tested in their community and *least likely* to be excited about using flying cars and seeing this technology tested in their community.

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AGENDA

UTILIZATION

REGULATION

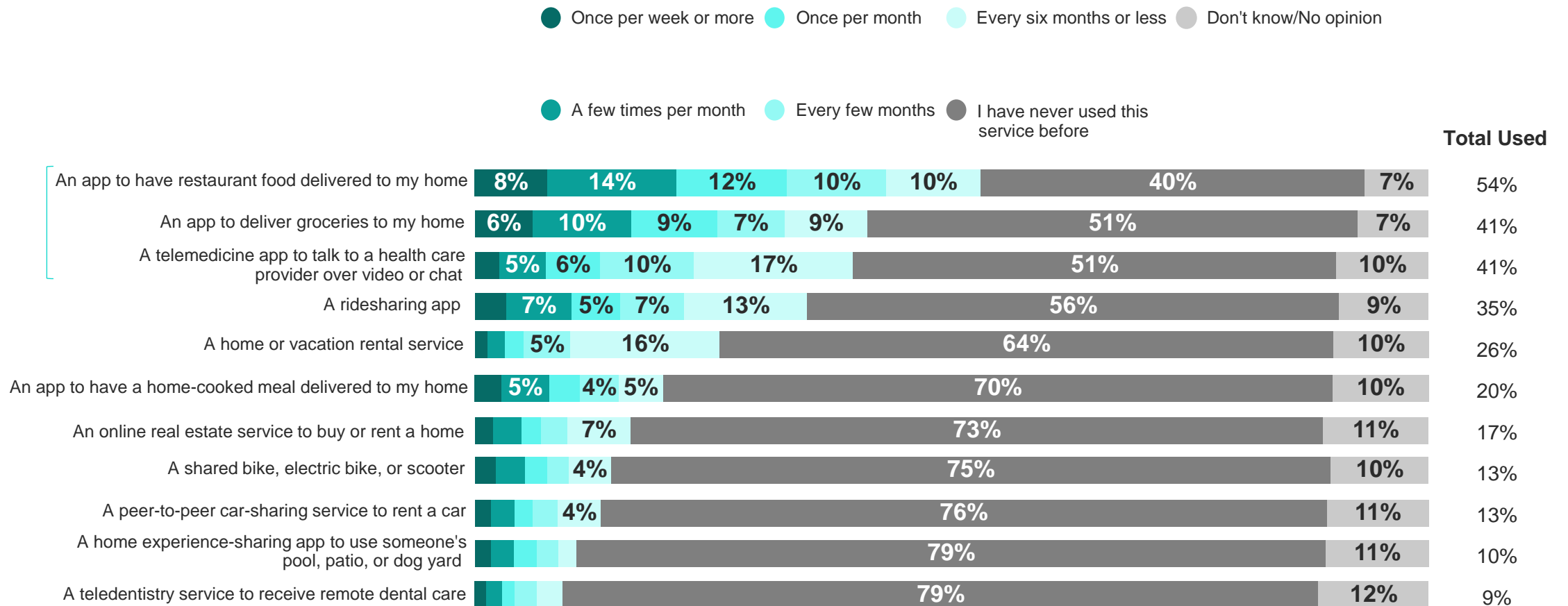
FUTURE SERVICES



UTILIZATION

Over the past 12 months, adults are most likely to have used an app to deliver food (54%), groceries (41%), or have a telemedicine appointment (41%).

In the past 12 months, how frequently, if at all, have you utilized each of the following services?



## UTILIZATION

Adults living in urban areas are more likely than those living in less populated areas to have used the tested services in the past 12 months.

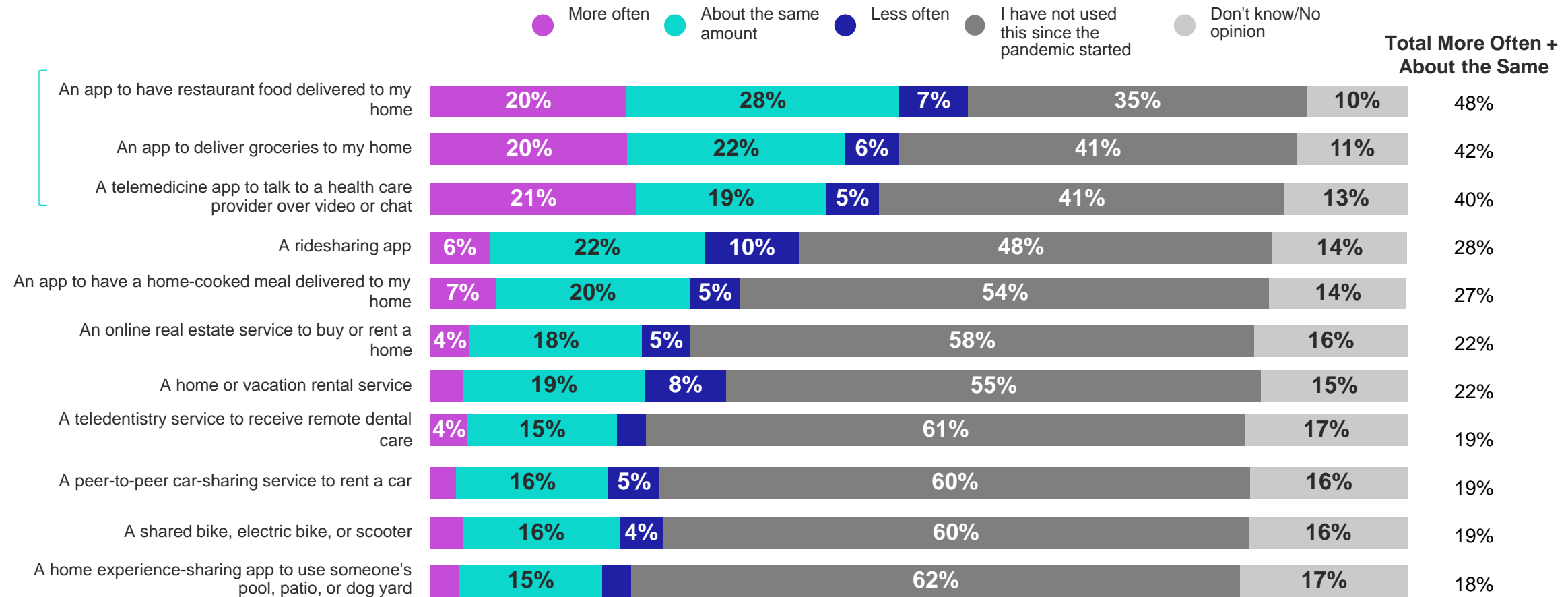
In the past 12 months, how frequently, if at all, have you utilized each of the following services?

% Total Used	Adults	A large city	A suburb near a large city	A small city or town	A rural area
An app to have restaurant food delivered to my home	54%	68%	52%	50%	39%
An app to deliver groceries to my home	41%	56%	44%	31%	30%
A telemedicine app to talk to a health care provider over video or chat	41%	42%	44%	36%	34%
A ridesharing app	35%	52%	36%	28%	20%
A home or vacation rental service	26%	28%	26%	22%	23%
An app to have a home-cooked meal delivered to my home	20%	28%	18%	18%	13%
An online real estate service to buy or rent a home	17%	20%	17%	16%	14%
A shared bike, electric bike, or scooter	13%	24%	12%	10%	10%
A peer-to-peer car-sharing service to rent a car	13%	18%	14%	11%	9%
A home experience-sharing app to use someone's pool, patio, or dog yard	10%	15%	10%	9%	8%
A teledentistry service to receive remote dental care	9%	15%	8%	9%	6%

UTILIZATION

A fifth of adults say they use a telemedicine app (21%), an app to deliver food (20%), and an app to deliver groceries (20%) *more often* now compared to before the COVID-19 pandemic

Do you use each of the following services more often, less often, or about the same amount as you did before the COVID-19 pandemic began in March 2020?



## UTILIZATION

Adults living in urban areas are more likely than those living in less populated areas to have used the tested services *more often* or *about the same amount* compared to before the COVID-19 pandemic, excluding telemedicine where suburban adults are most likely to have used this service.

Do you use each of the following services more often, less often, or about the same amount as you did before the COVID-19 pandemic began in March 2020?

% Total More Often + About the Same	Adults	A large city	A suburb near a large city	A small city or town	A rural area
An app to have restaurant food delivered to my home	48%	59%	50%	42%	37%
An app to deliver groceries to my home	42%	52%	45%	37%	31%
A telemedicine app to talk to a health care provider over video or chat	40%	40%	46%	34%	36%
A ridesharing app	28%	36%	29%	25%	21%
An app to have a home-cooked meal delivered to my home	27%	32%	27%	23%	23%
An online real estate service to buy or rent a home	22%	24%	22%	19%	20%
A home or vacation rental service	22%	25%	23%	19%	20%
A teledentistry service to receive remote dental care	19%	22%	20%	16%	16%
A peer-to-peer car-sharing service to rent a car	19%	23%	18%	15%	17%
A shared bike, electric bike, or scooter	19%	27%	18%	15%	16%
A home experience-sharing app to use someone's pool, patio, or dog yard	18%	21%	17%	14%	18%

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AGENDA

UTILIZATION

REGULATION

FUTURE SERVICES







## BACKGROUND

*The following text was provided to respondents:*

Below are descriptions of some different types of services.

**Peer-to-peer car-sharing services** refer to services that allow people to rent a private vehicle from another person, such as Turo or Getaround.

**Home-sharing services** refer to services that allow people to rent a private residence from another person, such as Airbnb or VRBO.

**Home experience-sharing services** refer to services that allow people to share individual, experience-based aspects of their private residence, such as a home pool, patio, or home theater.

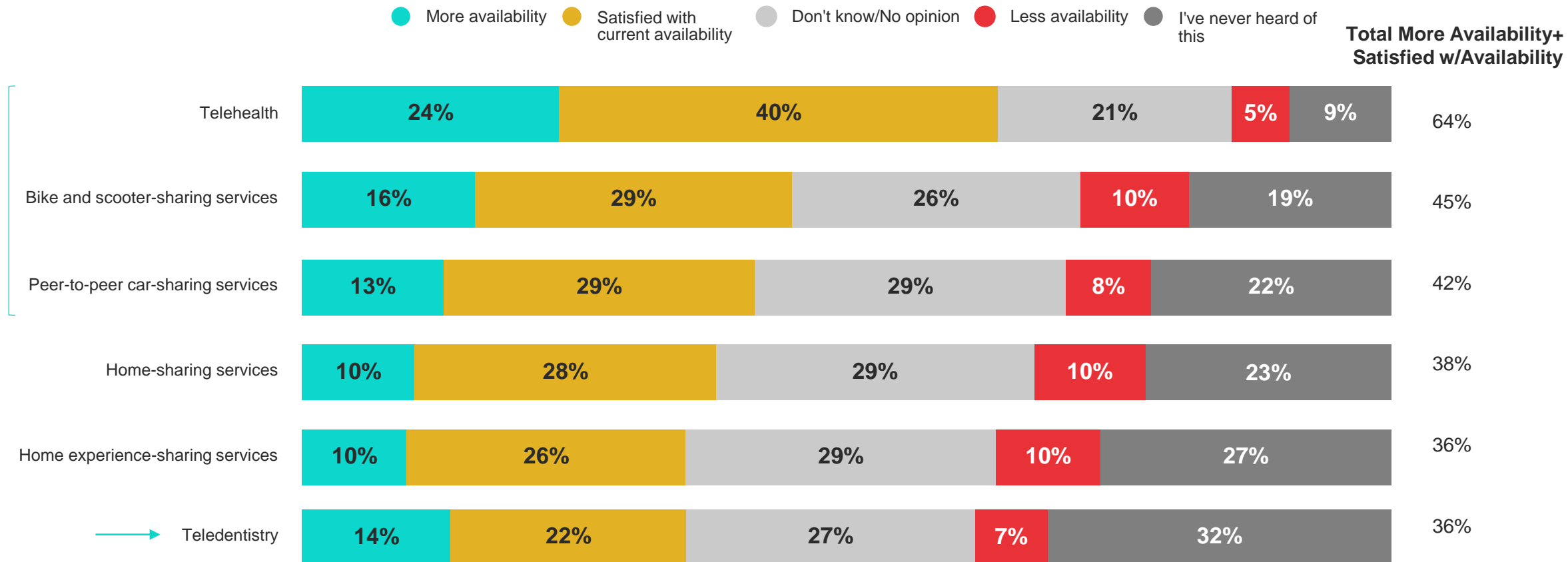
**Telehealth** and **teledentistry** refer to the remote administration of health care and dental care by phone, instant messaging, or other digital means.

**Bike and scooter-sharing services** refer to services that facilitate communal sharing of bikes, e-bikes, and scooters.

REGULATION

Adults are more likely to say they would like to see *more availability* rather than *less availability* of telehealth, bike and scooter-sharing services, teledentistry, and peer-to-peer car-sharing services in their local community.

In your local community, would you like to see more or less availability of the following services, or are you satisfied with the current availability offered?



## REGULATION

At least half of adults living in a large city would like to see *more availability* or are *satisfied with the current availability* of telehealth (63%), bike and scooter-sharing (53%), and peer-to-peer car sharing services (50%).

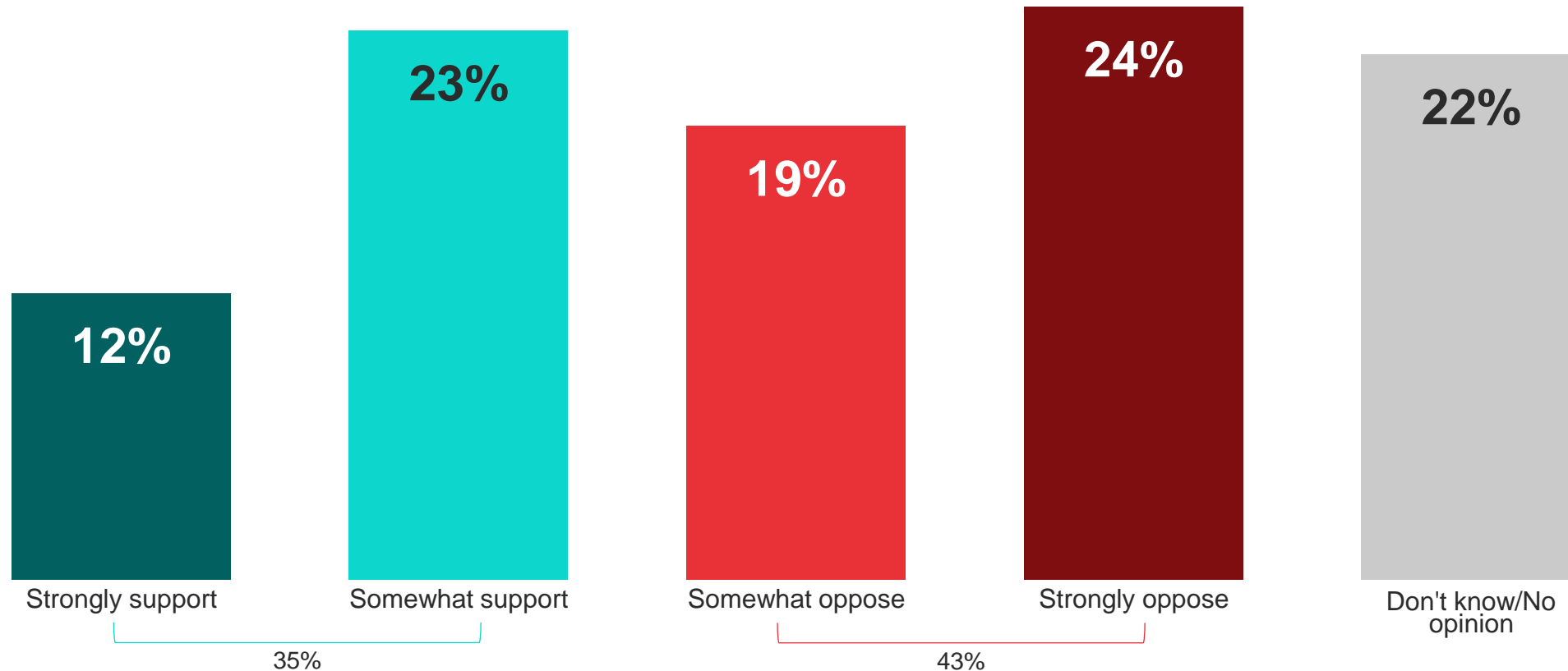
In your local community, would you like to see more or less availability of the following services, or are you satisfied with the current availability offered?

% Total More Availability + Satisfied w/Availability	Adults	A large city	A suburb near a large city	A small city or town	A rural area
Telehealth	64%	63%	68%	61%	60%
Bike and scooter-sharing services	45%	53%	45%	42%	40%
Peer-to-peer car-sharing services	42%	50%	42%	37%	35%
Home-sharing services	38%	43%	38%	34%	36%
Home experience-sharing services	36%	42%	35%	31%	31%
Teledentistry	36%	42%	34%	33%	32%

REGULATION

Adults are more likely to *oppose* (43%) rather than *support* (35%) proposed delivery service regulations, while 22% are unsure.

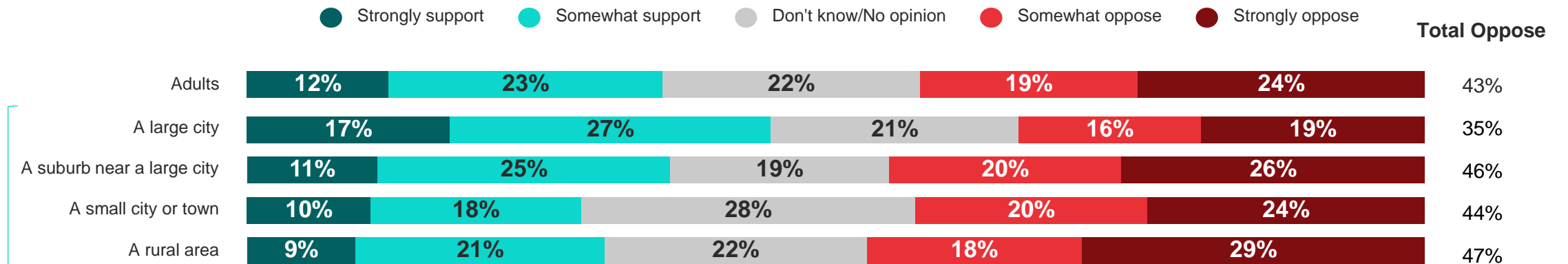
Some communities have proposed government regulations on food and grocery delivery services that would increase revenue for restaurants and grocery stores by raising the total cost of delivery for consumers. Do you support or oppose the proposed delivery service regulations?



## REGULATION

Adults living in the suburbs and rural areas are more likely than those in more urban community types to oppose proposed delivery service regulations.

Some communities have proposed government regulations on food and grocery delivery services that would increase revenue for restaurants and grocery stores by raising the total cost of delivery for consumers. Do you support or oppose the proposed delivery service regulations?





## BACKGROUND

*The following text was provided to respondents:*

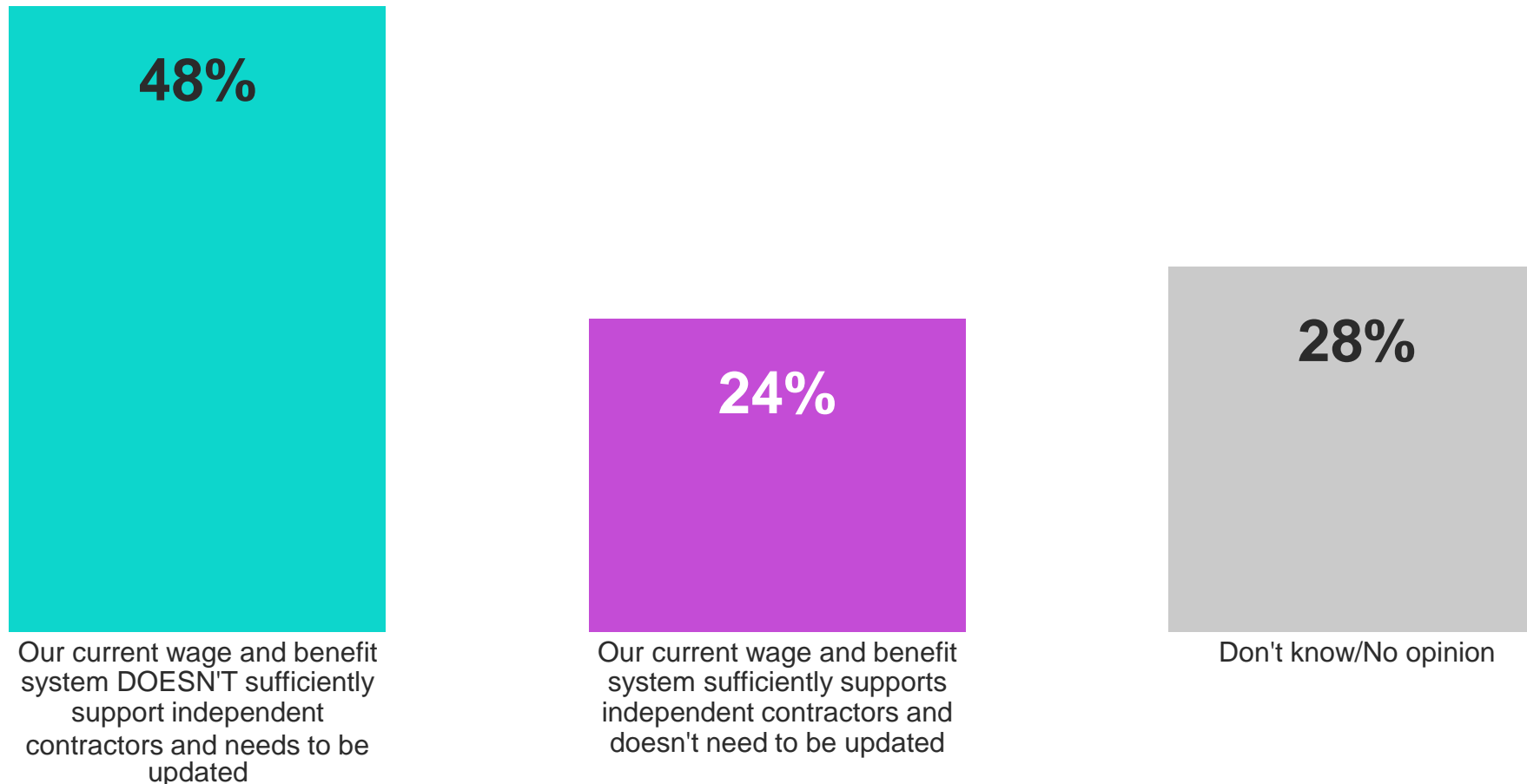
As you may know, an **independent contractor** is a person, business, or corporation that provides goods or services for another individual or company, but is not an employee of the company that is paying them.

Many delivery and rideshare drivers are independent contractors and are not considered full-time employees of rideshare or delivery services. With this, drivers are able to choose how and when they work, but are not able to receive the benefits or structure of a full-time employee.

REGULATION

Nearly half (48%) of adults think our wage and benefit system *doesn't* sufficiently support independent contractors and needs to be updated.

Some delivery and rideshare drivers work as independent contractors for multiple services at once. Thinking about this group of workers, which comes closer to your view, even if neither is exactly right?



48%

Our current wage and benefit system DOESN'T sufficiently support independent contractors and needs to be updated

24%

Our current wage and benefit system sufficiently supports independent contractors and doesn't need to be updated

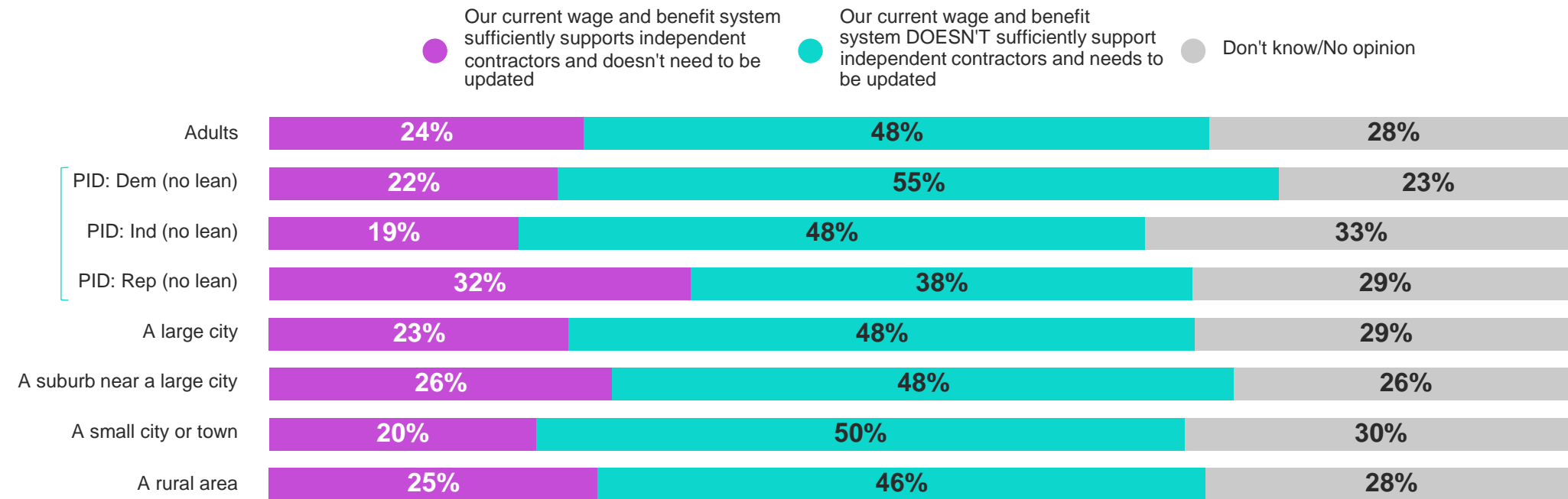
28%

Don't know/No opinion

REGULATION

A bipartisan plurality agree our current wage and benefit system *doesn't* sufficiently support independent contractors and needs to be updated (Dem. 55%, Ind. 48%, Rep. 38%).

Some delivery and rideshare drivers work as independent contractors for multiple services at once. Thinking about this group of workers, which comes closer to your view, even if neither is exactly right?



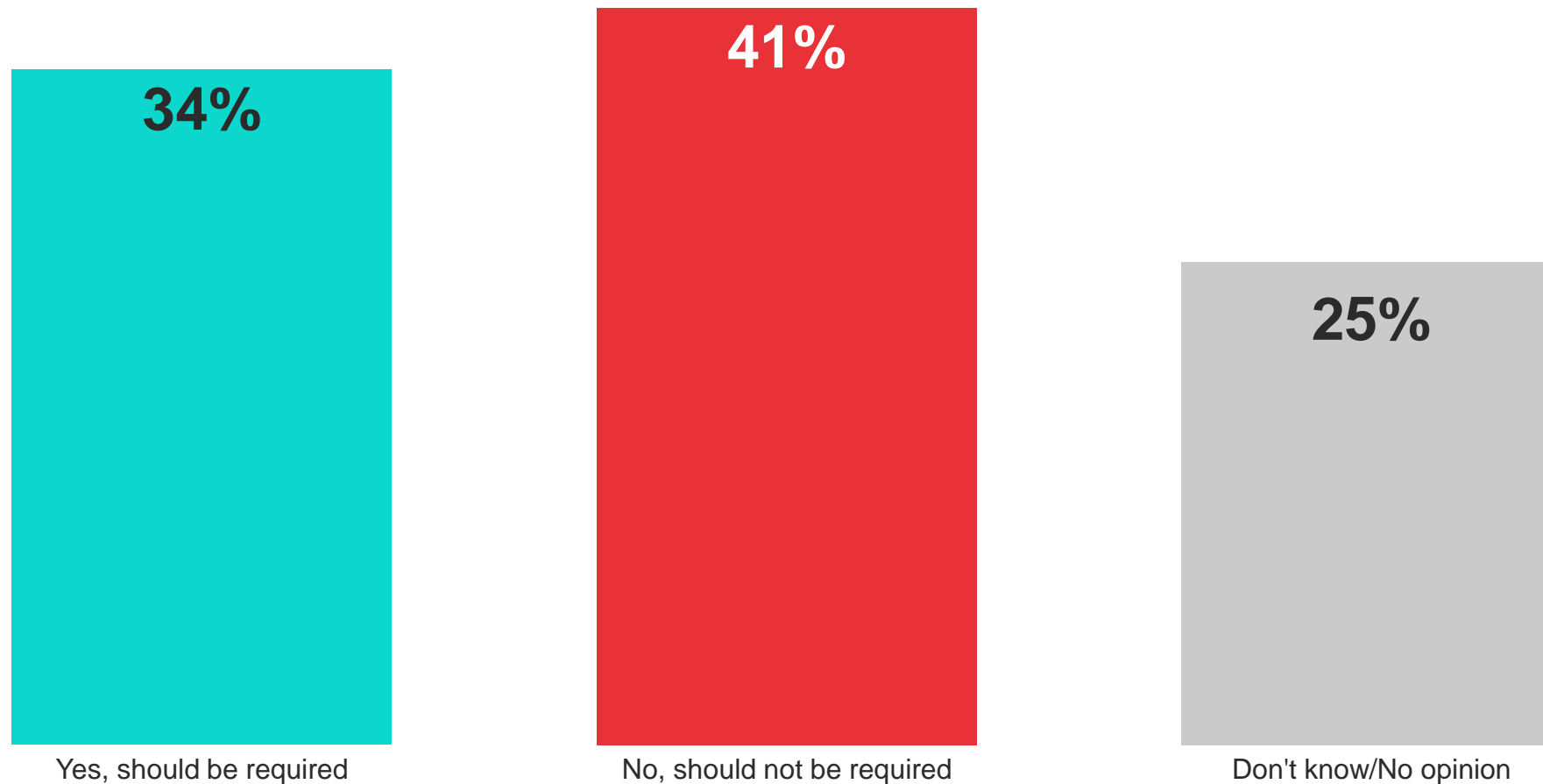


## REGULATION

A plurality (41%) of adults who live in the suburbs *do not* think rideshare and delivery services should be required to employ drivers as full-time employees.

Do you think rideshare and delivery services should be required to employ drivers as full-time employees?

ADULTS WHO LIVE IN A SUBURB NEAR A LARGE CITY, N=857



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AGENDA

UTILIZATION

REGULATION

FUTURE SERVICES

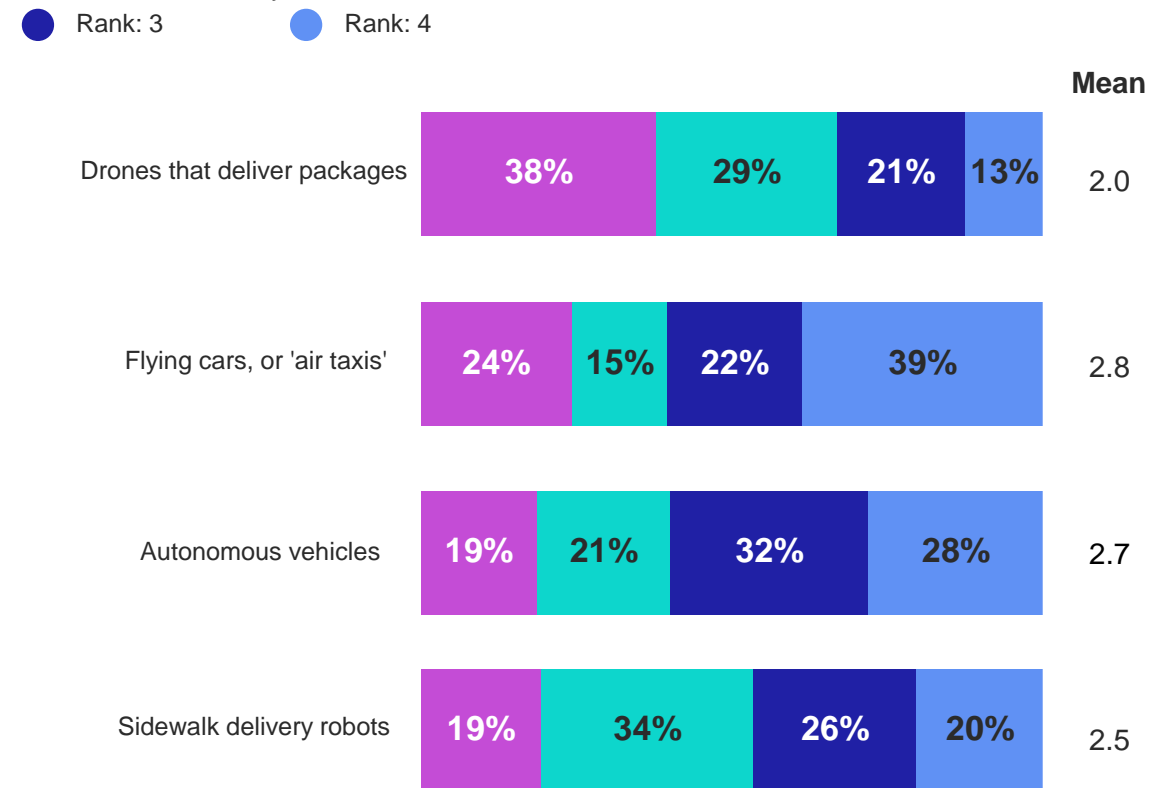
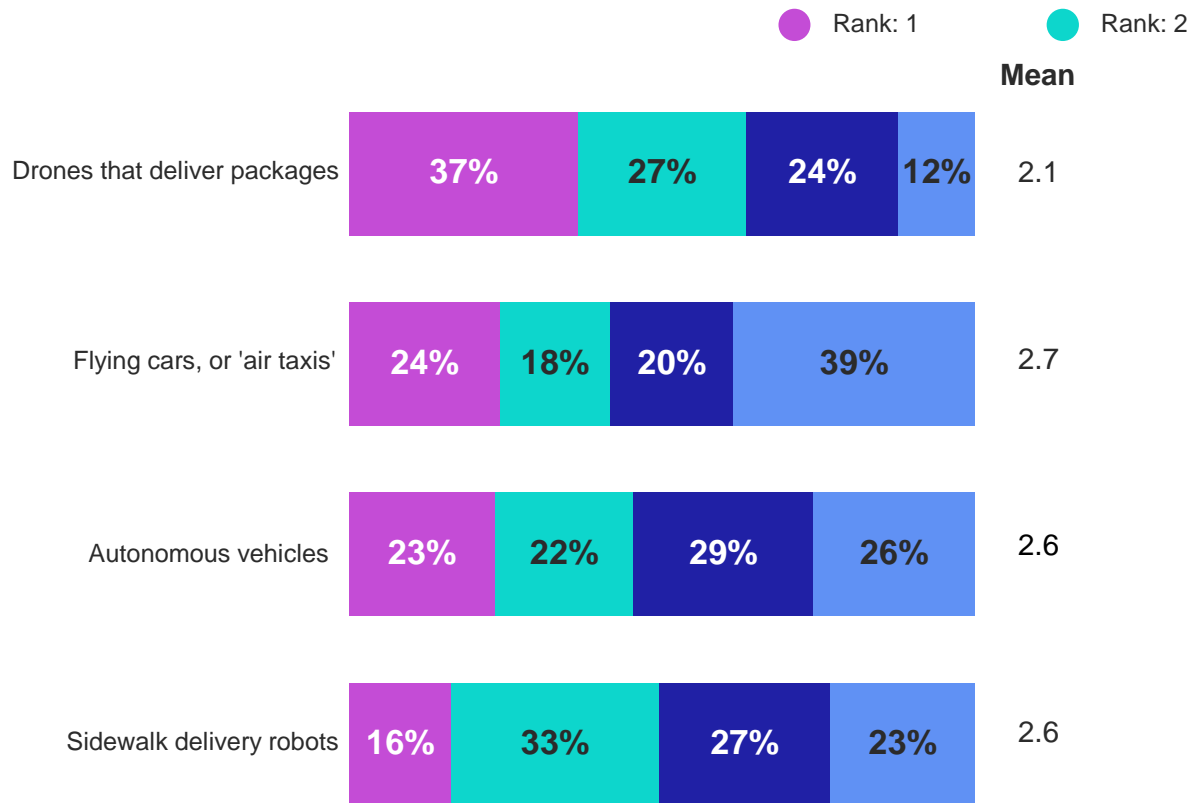


FUTURE SERVICES

Of the four tested technologies, adults are *most likely* to be excited about using drones that deliver packages and seeing this technology tested in their community and *least likely* to be excited about using flying cars and seeing this technology tested in their community.

Which new technology are you most excited to use, with 1 being the MOST exciting and 4 being the LEAST exciting.

Which of these technologies would you like to see tested in your community, with 1 being what you'd MOST like to see and 4 being what you'd LEAST like to see.

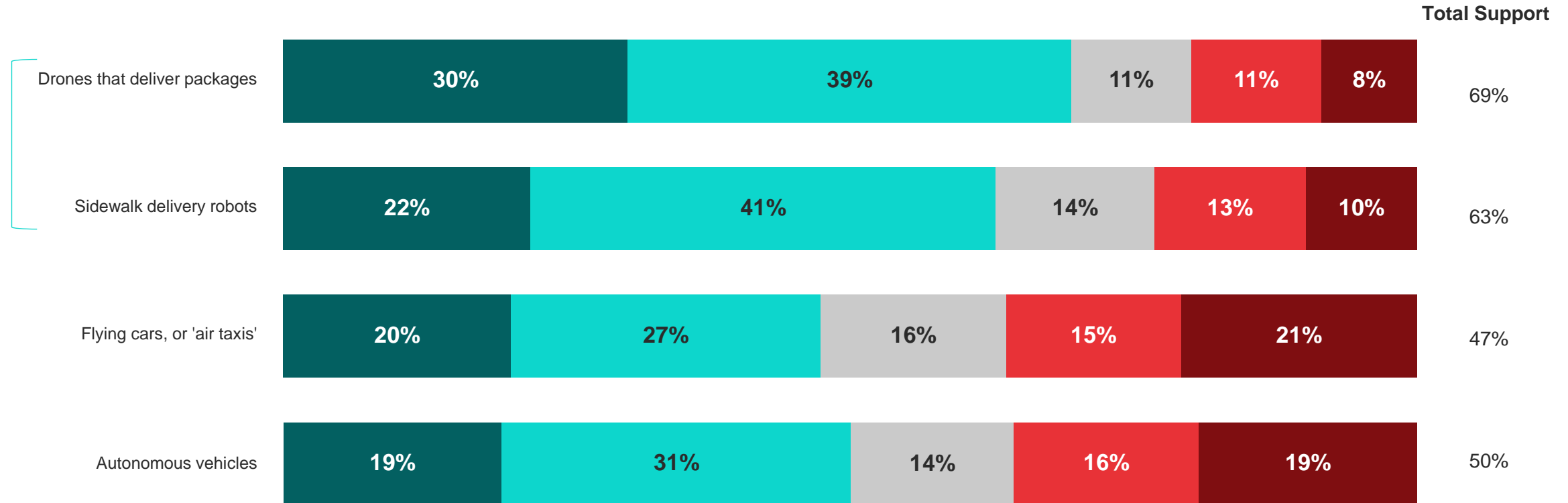


FUTURE SERVICES

Two thirds of adults *support* drones that deliver packages (69%) and sidewalk delivery robots (63%) becoming available in their community.

Do you support or oppose the following new technologies becoming available in your community?

● Strongly support   ● Somewhat support   ● Don't know/No opinion   ● Somewhat oppose   ● Strongly oppose



## FUTURE SERVICES

A majority of Democrats *support* all of the tested technologies becoming available in their community. Across community type, urban adults are most likely to support autonomous vehicles and air taxis, while suburban and rural adults are most likely to support drones that deliver packages becoming available in their community.

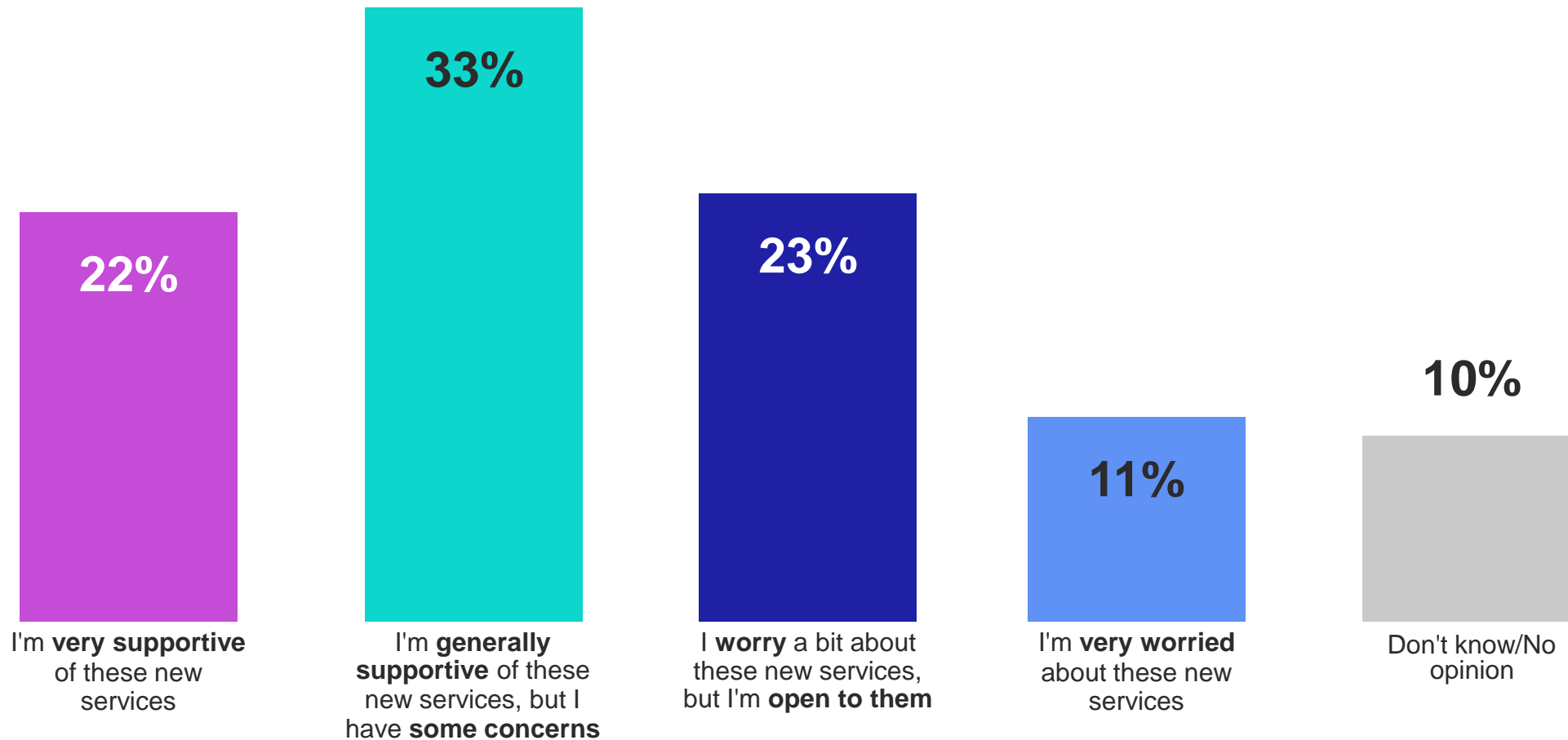
Do you support or oppose the following new technologies becoming available in your community? % **Support**

	Adults	PID: Dem (no lean)	PID: Ind (no lean)	PID: Rep (no lean)	A large city	A suburb near a large city	A small city or town	A rural area
Drones that deliver packages	69%	75%	65%	67%	70%	71%	68%	68%
Sidewalk delivery robots	63%	70%	60%	57%	66%	65%	63%	54%
Flying cars, or 'air taxis'	47%	52%	44%	45%	54%	45%	46%	46%
Autonomous vehicles	50%	59%	46%	44%	58%	49%	49%	45%

FUTURE SERVICES

YIMBY vs. NIMBY: Adults are more likely to be supportive (55%) than worried (34%) about the availability of new technologies and services in their community.

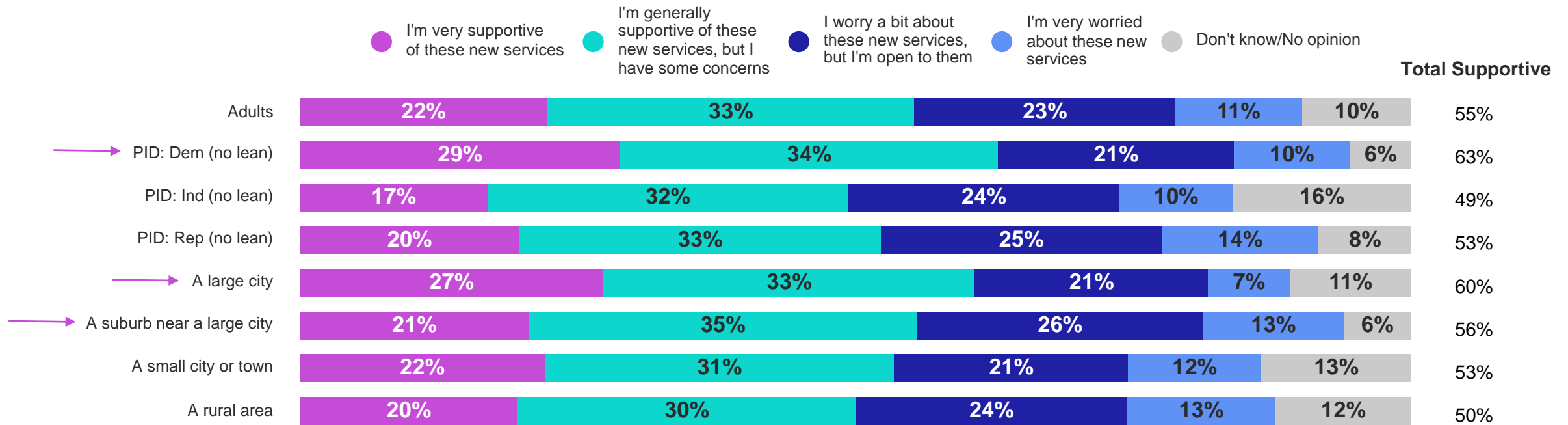
When it comes to the availability of new technologies and services like these in your community, what best describes your view?



FUTURE SERVICES

Democrats (29%) and adults living in a large city (27%) are most likely to be very supportive of the availability of new technologies and services in their community, while suburban adults are split between being very supportive (21%) and very worried (26%).

When it comes to the availability of new technologies and services like these in your community, what best describes your view?





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