



## Understanding Road Safety Issues for Courier and Food Delivery Riders and Delivery Businesses in London

London Road Safety Unit  
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### Overview

This summary presents the findings from a survey carried out in 2006 to gain a greater understanding of London-based courier and food delivery businesses using powered two wheeler (P2W) and cycle delivery riders (1).

Telephone interviews were conducted with courier and food delivery companies to enable a comparison between the two types of delivery company.

The results indicate that there is a substantial number of delivery riders in London. Estimates suggest that there may be over 13,000 food delivery and 6,000 courier riders in London.

There are considerable differences between riders in the two delivery sectors. Food delivery companies use contracted riders who are younger and less experienced. Riders in these companies use less powerful vehicles and cover fewer miles per shift. Courier companies deploy more professional riders who ride on a freelance basis. Riders for courier companies provide their own vehicles and safety equipment and work more hours per shift.

The results indicate that courier and food delivery companies and their riders

are very different and they need to be considered separately when Transport for London (TfL) and partner organisations are planning road safety initiatives.

### Background

P2W and cycle riders are two of the most vulnerable road user groups in London. In 2006, P2W riders made up 21% of all killed and seriously injured casualties and 15% of slight injuries on London's roads, yet they account for less than 3% of vehicles kilometres travelled (2).

Cyclist made up 10% of all killed and seriously injured casualties and 10% of slight injuries on London's roads in 2006, but account for a very small proportion of kilometres travelled.

Addressing work related road safety issues is a potentially effective way of improving road safety and reducing casualties among P2W riders and cyclists. Understanding the conditions under which delivery riders, both P2W riders and cyclists, operate in London and how this might affect their safety is an important element to improving the road safety for those who ride professionally.



# Research summary

This research was commissioned by TfL and carried out by Synovate. The research was undertaken to gain a greater understanding of delivery companies and delivery riders. The research was designed to profile London-based delivery companies and to identify their awareness of and adherence to good road safety practices.

## Objectives

The objectives of the research were to:

1. Estimate the number of delivery riders in London
2. Provide a profile of delivery riders
3. Identify awareness of and adherence to good road safety practices in London
4. Identify current road safety practices
5. Estimate the number and type of collisions involving delivery riders

## Method

The survey was conducted through telephone interviews with London-based courier and food delivery businesses that deploy P2W and/or cycle delivery riders. The interviews were conducted with a suitable person within the company who had knowledge of the road safety policies, training and records of that business. This requirement meant that interviewees held a range of different positions and job titles, depending on the size and type of the company (e.g., Managing Director, Director, General Manager, Operations Manager, Fleet Manager, Control Manager, Despatch Supervisor, Transport Manager).

Representatives from 55 courier companies and 100 food delivery companies were interviewed in June 2006.

### Selection of Delivery Companies

There are an estimated 688 courier companies and 5,320 food delivery companies found to be operating in

London. Of the 688 courier companies, approximately 130 used P2W and/or cycle delivery riders in their businesses. All 130 companies were contacted and 55 agreed to participate in the study.

Of the 5,320 food delivery companies operating in London, 1,660 were randomly selected. Of these companies, 514 used P2W and/or cycle riders in their businesses. All 514 companies were contacted and 100 agreed to participate in the study.

## Results

In this summary, the terms 'courier company' and 'food delivery company' will be used to refer to the two different businesses. The term 'delivery company' will be used to refer to the entire sample of both courier and food delivery companies. Similarly, the term 'delivery rider' will be used to refer to all riders, while 'P2W rider' and 'cycle rider' will be used to distinguish between the two types of delivery riders.

### 1. Estimate of the Number of Delivery Riders in London

Almost all delivery companies interviewed used P2W riders (96% of couriers and 92% of food delivery companies). The number who used cycle riders was considerably lower, with 45% of courier companies and 16% of food delivery companies using cycle riders.

Delivery companies were asked how many riders they deployed. The average number of P2W riders for food delivery companies was eight riders. The average for courier companies was 47 P2W riders, however, this average is influenced by a small number of very large courier companies. Of the companies who use cycle riders, the average number was lower, with an average of two cycle riders for food delivery companies and 10 cycle riders for courier companies.

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Based on the approximate number of delivery companies known to operate in London and the average number of delivery riders, estimates of the number of delivery riders in London were made.

Of the 5,320 food delivery companies found to be operating in London, it was estimated that 1,650 companies deploy P2W or cycle riders. Based on the finding that a food delivery company deploys an average of eight P2W riders, it was estimated that there may be 13,200 P2W riders working for food delivery companies in London.

Of the 1,650 food delivery companies deploying P2W or cycle riders, approximately 16% deploy cycle riders. Based on the finding that a food delivery company deploys an average of two cycle riders, it was estimated that there may be 530 cycle food delivery riders in London.

Similarly, of the 688 courier companies operating in London, an estimated 130 companies use P2W or cycle riders. A courier company deploys an average of 47 P2W riders, and therefore, it was estimated that there may be 6,100 P2W riders working for courier companies in London.

Of the 130 courier companies deploying P2W or cycle riders, an estimated 45% deploy cycle riders. A courier company deploys an average of ten cycle riders, and therefore, there are an estimated 590 cycle courier riders in London.

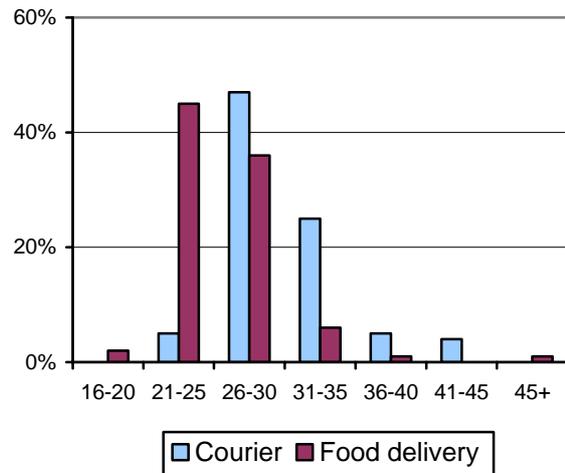
It is important to note that these figures have been derived from estimated variables. Although they give an indication of the number of delivery riders in London, these estimates should be used with caution.

## 2. Delivery Riding in London

Courier riders are older and more experienced. Food delivery riders are younger and more likely to work part time.

Delivery companies were asked the age group in which the majority of their riders belonged. Figure 1 shows that the majority of food delivery riders fell into younger age groups, compared to courier riders. Most food delivery companies stated that the majority of their riders were in either the 21-25 year or 26-30 year age group. Courier riders were slightly older, with the majority in the 26-30 year or 31-35 year age group.

Significantly more food delivery companies stated that most of their riders were aged between 21-25 years (45%) compared to courier companies (5%). In contrast, courier riders were more likely to be older, with significantly more courier companies (25%) saying that their riders were aged between 31-35 years, compared to 6% of food delivery companies. These differences are significant at the 5% level.



**Figure 1: Proportion of delivery companies who state that the majority of their riders are within the age ranges (age in years).**

In addition to being older than food delivery riders, courier riders are more likely to work full time. Table 1 shows that 85% of courier companies stated that they deploy full time riders and 40% deploy part time riders (including 25% who deploy both). Food delivery companies were equally likely to deploy full time (72%) and part time (76%) riders, with 50% deploying both.

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**Table 1: Proportion of Riders Types in Courier and Food Delivery Companies**

| Number of delivery companies who use ... | Courier | Food delivery | % Courier | % Food delivery |
|--|---------|---------------|-----------|-----------------|
| P2W riders                               | 53      | 92            | 96        | 92              |
| Cycle riders                             | 25      | 16            | 45        | 16              |
| Both P2W and cycle riders                | 23      | 8             | 42        | 8               |
| Full time riders                         | 48      | 72            | 87        | 72              |
| Part time riders                         | 22      | 76            | 40        | 76              |
| Both full time and part time riders      | 14      | 46            | 25        | 46              |
| Contracted riders                        | 16      | 60            | 29        | 60              |
| Freelance riders                         | 44      | 50            | 80        | 50              |
| Both contracted and freelance riders     | 4       | 6             | 7         | 6               |

*Note.* There were 55 courier companies and 100 food delivery companies in the sample.

Length of deployment is longer for courier riders than for food delivery riders.

The majority of riders work for courier companies for between 1 to 2 years (36%) and 2 to 5 years (40%) compared to 17% and 8% of food delivery riders, respectively. Food delivery riders are more likely to work for shorter lengths of between 1 to 6 months (21%) and 6 months to 12 months (42%), compared to 0% and 11% of courier riders, respectively. These differences are significant at the 5% level.

Courier riders are more likely to work freelance and be paid on commission. Food delivery riders are more likely to be contracted and paid a fixed salary.

Companies were asked whether they use contracted riders or riders who are freelance or self employed. Table 1 shows that delivery companies are likely to deploy *either* contracted or freelance riders, with 4% of courier and 10% of food delivery companies deploying both. The majority of courier companies used freelance (81%) rather than contracted riders (23%), while food delivery companies were equally likely to use either freelance (51%) or contracted riders (53%).

The main method of payment for courier riders was by commission based on the number of deliveries made (66%). Food delivery companies were more likely to pay riders a fixed salary (78%).

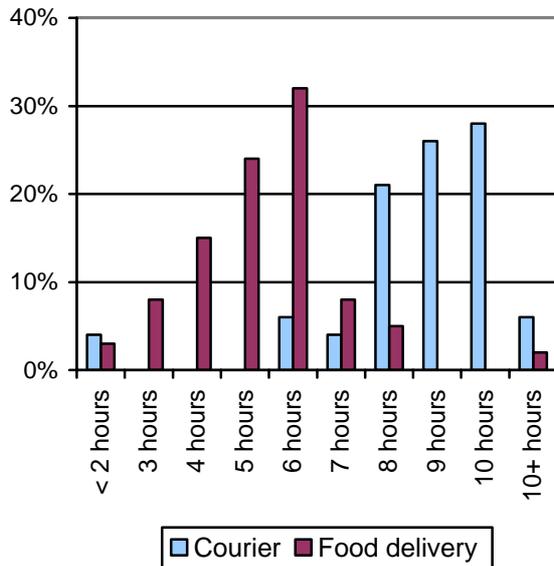
Compared to food delivery companies, courier companies make more deliveries per day and their riders cover more miles and work more hours per shift.

Nearly two thirds (62%) of courier companies stated that they make over 100 deliveries per day, more than food delivery companies, where the majority (60%) make fewer than 50 deliveries per day and 15% make fewer than 10 deliveries per day.

Delivery companies were asked to approximate the distance each rider covered per shift. Results showed that P2W courier riders cover an average of 121 miles per shift, while P2W food delivery riders cover an average of 23 miles per shift. This difference is not surprising given the localised nature of food delivery businesses. For cyclists, the distances travelled were considerably less but the same difference between courier and food delivery riders was found. Cycle courier riders cover an average of 42 miles per shift and cycle food delivery riders cover an average of 10 miles per shift.

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Similar to distance ridden, a difference in the number of hours worked per shift was found between the two delivery companies. Food delivery riders were significantly more likely to work shorter shifts than courier riders. Food delivery companies were more likely to state that shift lengths for P2W riders were between 3 and 4 hours (23%) or 5 and 6 hours (55%), compared to 0% and 6% of courier companies, respectively (see Figure 2). In contrast, courier companies were significantly more likely to state that their P2W riders work longer shifts of between 7 and 8 hours (24%) or 9 and 10 hours (52%), compared to 13% and 0% of food delivery companies, respectively (see Figure 2). A similar pattern was also found for cycle delivery riders. However, due to the small number of delivery companies who use cycle riders, these differences failed to reach significance.

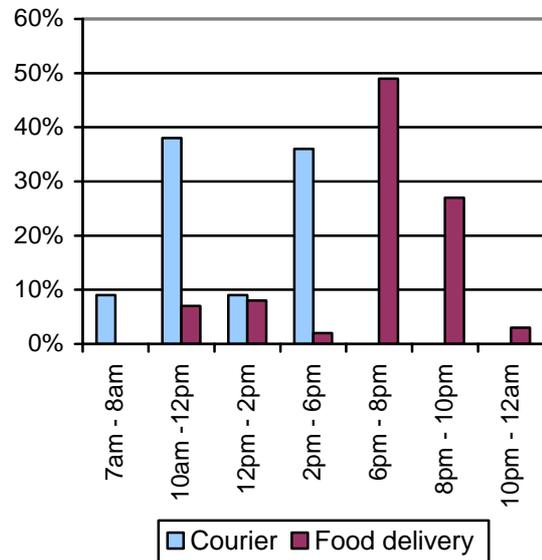


**Figure 2: Number of hours worked per shift for P2W courier and P2W food delivery riders.**

Differences in peak delivery hours suggest that courier and food delivery riders are subjected to different road traffic collision risks.

Differences in core business functions between the two delivery sectors are reflected in their peak delivery times.

Food delivery companies largely cater to customers during meal times, while couriers are more active during business hours.



**Figure 3: Peak delivery times for courier and food delivery companies.**

As shown in Figure 3, courier companies are more likely have peak delivery periods between 10.00am to 12.00pm (38%) and 2.00pm to 6.00pm (36%), compared to food delivery riders (7% and 2%, respectively). In contrast, food delivery companies are more likely to deliver between 6.00pm to 8.00pm (49%) and 8.00pm to 10.00pm (27%), compared to couriers, where no companies stated that their peak delivery periods were during these times. These differences are significant at the 5% level.

These differences in peak delivery times indicate that courier riders are more likely to be on the roads during peak traffic periods, while food delivery riders are more likely to be working during the hours of darkness. Therefore, there are separate road safety issues for the two delivery sectors.

Courier riders have time limits imposed on deliveries, while food delivery riders are under time pressure to make quick deliveries.

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Forty-seven percent of courier companies stated that they imposed time limits on deliveries. The most common penalties for not meeting these limits were payment deductions (27%) and verbal warnings (15%). Fewer food delivery companies imposed time limits (31%), and of those who did, almost no penalties were imposed on riders who did not meet them.

Although food delivery riders are unlikely to work to specific time limits, a focus on customer satisfaction and a need to deliver food while it is still hot, can lead to a pressure to make deliveries within a very short period of time. This time pressure for food delivery riders could result in safety being compromised in order to make fast deliveries. This notion is supported by the finding that the majority (60%) of food delivery companies agree that reducing time pressures on riders would improve road safety, compared to 40% of couriers companies.

The type of P2W vehicle used differs between the delivery companies.

P2W courier riders make deliveries over longer distances and are therefore more likely to ride larger motorbikes or scooters. Ninety-one percent of courier companies said that their P2W riders use motorcycles over 125cc, compared to 7% of food delivery companies. This difference is significant at the 5% level.

Food delivery riders operate in a more localised area and ride smaller motorcycles or scooters. Forty percent of food delivery companies said that their P2W riders use vehicles up to 50cc and 68% said they use vehicles up to 125cc. However, this was not significantly different to courier companies, where 32% and 72% said that their P2W riders use vehicles up to 50cc and up to 125cc, respectively.

Differences in recruitment channels indicate that a greater level of professionalism is required by courier companies.

The most common place to advertise for new food delivery riders was in shop windows (58%), significantly more than for courier riders (4%). Courier companies were significantly more likely to use word of mouth (56%) and specialist press (33%) to recruit riders, compared to 36% and 2% of food delivery companies, respectively. Specialist press was used almost exclusively by courier companies and may indicate that a greater degree of professionalism and experience is required by courier companies.

### 3. Awareness of and Adherence to Good Road Safety Practices

The Courier Code (3) is the industry's recommended code of practice. The code was prepared by the Despatch Association and has been adopted by the Department for Transport. The code aims to raise road safety standards of P2W and cycle delivery riders. Delivery companies have the option to sign up to the Courier Code and in doing so both the company and associated riders have responsibilities under the code.

Just over half (56%) of the courier companies were aware of the Courier Code. However, many of them had little or no understanding of the code guidelines. Awareness of the code among food delivery companies was much lower, with 9% stating that they were aware of the code. The finding that courier companies are more aware of the Courier Code may be because delivering goods is their core business function, whereas for food delivery companies, delivery is of secondary importance to the quality of the food. Despite a general low level of awareness or understanding, 47% of courier companies and 20% of food delivery companies indicated that

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they would be prepared to sign up to the code.

Most delivery companies do not require riders to have any previous riding or delivery experience.

The Courier Code recommends that all delivery riders should have previous riding or despatch experience before starting work and that they should be properly trained. However, 40% of courier companies and 30% of food delivery companies stated that they did not require previous riding or delivery experience from their riders.

Around a third of courier companies and two-thirds of food delivery companies deploy P2W riders who hold provisional licences.

The Courier Code recommends that all delivery riders hold full licences before they begin delivering. However, over a third (34%) of courier companies and nearly two-thirds (63%) of food delivery companies deploy riders who hold provisional licences.

The type of licences held by P2W delivery riders differed across the two companies. Food delivery companies were significantly more likely to state that their P2W riders hold provisional licences for vehicles up to 50cc (37%, compared to 15% of courier companies). Courier companies were significantly more likely to state that their riders hold full licences covering all capacities of P2W, which includes vehicles over 125cc (92%, compared to 22% of food delivery companies).

This difference in licences held by food delivery and courier P2W riders is reflected in the types of vehicles they use. As previously mentioned, food delivery riders are more likely to ride vehicles up to 50cc and courier riders are more likely to ride vehicles over 125cc. Therefore delivery riders are likely to hold licences up to the size of the vehicles

they ride.

The frequency of licence checks varies considerably from company to company and no industry-wide policy appears to exist. While most delivery companies stated that they inspected licences more than once a year, 21% only check them annually.

Food delivery companies are more likely than courier companies to check that vehicles are roadworthy.

The Courier Code recommends that all vehicles be roadworthy and that regular inspections be carried out. The results showed that significantly more courier companies (23%) never perform such inspections, compared to food delivery companies (5%). This finding is likely to be because the courier riders are more likely to ride on a freelance basis and be responsible for their own vehicles.

Many staff members in companies where inspections are carried out often did not have any qualifications to do so. Over a third (37%) of courier companies, and a fifth (20%) of food delivery companies allow inspections to be performed by staff without any formal qualifications. On a more positive note, nearly all companies whose riders use their own vehicles request verification of a valid M.O.T certificate (courier 92%, food delivery 82%).

### 4. Current Road Safety Practices

Food delivery companies are more likely to provide vehicles and safety equipment to their riders.

The quantity and type of equipment provided to riders differed significantly between the two types of delivery companies. Food delivery companies are significantly more likely to provide vehicles and safety equipment (e.g., high visibility clothing, helmets, protective gloves) to all of their riders. Courier companies are less likely to provide this equipment. However, they are

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significantly more likely to provide communication devices to their riders.

Courier companies utilise more experienced riders on a freelance basis, therefore there may be greater assumption that provision of equipment is the responsibility of the rider, plus a much greater likelihood that their riders will already own the equipment. Food delivery companies are far less likely to deploy experienced riders and the majority may feel a responsibility to provide their riders with the necessary equipment. Courier companies do provide their riders with more specialised delivery equipment (e.g., bags, panniers, communication devices) which are needed to manage deliveries.

Food delivery companies are more likely to offer formal training and guidance to their riders.

While 52% of food delivery companies had formal training schemes in place for their riders, this figure was 21% for courier companies. Similarly, 62% of food delivery companies provided new riders with guidance on safe riding techniques, compared to 30% of courier companies. These differences are statistically significant at the 5% level.

The finding that food delivery companies offer more formal training to their riders is likely to be because they deploy riders with less experience and therefore training is more necessary. Courier companies deploy riders who are more qualified and with a greater level of experience. Therefore, there might be an assumption that these riders should already be of a high standard and therefore do not require additional training.

Awareness of BikeSafe, the rider skills day organised by TfL and London police forces, was significantly higher among courier companies (45%) than food delivery companies (18%). Of the 24

courier companies who were aware of BikeSafe, six had riders who had attended the course. Of the 18 food delivery companies who had heard of BikeSafe, six had riders who had attended the course.

### 5. Collisions Involving Delivery Riders

Delivery companies were asked how many collisions their riders had been involved in over a 12 month period (from July 2005 to June 2006). Three types of incidents were identified: damage only, collisions that caused injury to the rider and collisions that caused injury to another road user. Table 2 shows the number of collisions by collision type. Damage only incidents were the most common, with 47% of courier companies and 32% of food delivery companies experiencing at least one damage only incident in the 12 month period. Thirty-five percent of courier companies reported that one or more riders had been injured in a collision, compared to 25% of food delivery companies. Collisions involving injury to another person were very rare, with 4% of courier companies and 3% of food delivery companies stating that at least one of their riders was involved in this type of collision in the 12 month period.

Of the 19 courier companies who had at least one rider injured in a collision, 12 companies stated that the rider was slightly injured, 9 companies stated that at least one rider was seriously injured (requiring a hospital stay), and 1 company reported a rider killed. Of the 26 food delivery companies who had at least one rider injured, 18 stated that the rider was slightly injured and 8 stated that the rider was seriously injured.

Courier companies reported a greater number of rider days lost due to collision involvement, a finding that reflects the higher number of reported collisions involving courier riders.

**Table 2: Number and proportion of rider collisions reported by delivery companies, by collision**

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type, between July 2005 and June 2006

| Number of collisions | Courier     |                 |                 | Food Delivery |                 |                 |
|----------------------|-------------|-----------------|-----------------|---------------|-----------------|-----------------|
|                      | Damage only | Injury to rider | Injury to other | Damage only   | Injury to rider | Injury to other |
| 0                    | 17 (31)     | 27 (49)         | 43 (78)         | 57 (57)       | 73 (73)         | 96 (96)         |
| 1                    | 7 (13)      | 9 (16)          | 1 (2)           | 17 (17)       | 18 (18)         | 1 (1)           |
| 2                    | 5 (9)       | 5 (9)           | 0 (0)           | 14 (14)       | 3 (3)           | 0 (0)           |
| 3                    | 6 (11)      | 1 (2)           | 0 (0)           | 2 (2)         | 2 (2)           | 1 (1)           |
| 4                    | 1 (2)       | 2 (4)           | 0 (0)           | 3 (3)         | 0 (0)           | 0 (0)           |
| 5-10                 | 4 (7)       | 0 (0)           | 0 (0)           | 4 (4)         | 2 (2)           | 1 (1)           |
| 10+                  | 2 (4)       | 2 (4)           | 1 (2)           | 2 (2)         | 1 (1)           | 0 (0)           |
| Mean                 | 4.64        | 1.24            | 0.29            | 2.28          | 0.96            | 0.14            |

*Note.* Percentages appear in parenthesis. Percentages may not add to 100% due to rounding. There were 55 courier companies and 100 food delivery companies in the sample. The numbers shown here are estimates and should be used as an indication only.

It is important to note that these data are an indication of the type and frequency of collisions involving delivery riders on London roads. It is likely that there are additional collisions that were not reported or recorded by delivery companies. Therefore, the data should be used as an indication only.

## Conclusions

P2W and cycle riders are two of the most vulnerable road user groups in London. The current research was undertaken to provide a greater understanding of P2W and cycle delivery riders and delivery companies. The findings show that there are a substantial number of delivery riders in London and important differences exist between the courier and food delivery sectors.

The vast majority of delivery riders in London ride P2Ws, with very few delivering on cycles. Estimates suggest there could be about 13,200 P2W food delivery riders, over twice as many as the estimated 6,100 P2W courier riders. Therefore, there are a large number of professional delivery riders in London and they are a worthwhile group for targeted road safety initiatives, especially those initiatives aimed at P2W riders.

Food delivery riders tend to be younger, hold provisional licences, and have less riding and delivery experience than courier riders. Courier riders work longer hours and cover more miles per shift. Both the relative inexperience of food delivery riders and the higher on-road exposure for courier riders are significant collision risk factors. Therefore, it is important to understand these differences and take them into account when designing road safety initiatives for delivery riders in the different sectors.

Data on collisions reported by delivery companies suggests that very few riders are involved in incidents while working. When they do occur, the outcome is likely to involve vehicle damage rather than personal injury. Courier companies reported a higher number of rider collisions as well as a higher number of rider days lost through collisions. These findings may have been influenced by several factors. First, because courier riders work more hours and ride more miles per shift, they have a higher exposure to road traffic collisions. Second, although fewer courier companies were included in the survey, there were substantially more riders per company, on average, compared to food

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delivery companies (see section 1, p. 2). Therefore, it is reasonable to expect that with more courier riders, there would also be more reported collisions. Finally, there is currently no industry-wide standard for reporting or recording collisions.

Therefore, it is difficult to know whether or not the higher incidence of courier rider collisions is due the existence of a systematic bias in collision reporting.

Clear differences were found in the structure of the two workforces and these differences have implications the effective targeting of road safety initiatives. Courier riders are generally full time freelance contractors. They are responsible for undertaking their own training, and for providing and maintaining their own vehicles and safety equipment. Food delivery riders are generally contracted part time employees. They rely on their company to provide the necessary vehicles and equipment, and to offer formal guidance and training. And indeed, the results showed that food delivery companies are more likely to provide their riders with equipment and training. However, it is unclear what training is offered and whether it is appropriate or fulfils the riders' needs.

These differences need to be considered when designing initiatives to promote road safety to delivery riders. To effectively address road safety issues for food delivery riders, initiatives should primarily be targeted at the company, because food delivery companies are responsible for providing training and maintaining vehicles and safety equipment. Road safety initiatives aimed at courier riders should be targeted at not only the company, but also at individual riders who are responsible for their own training and maintenance vehicles and safety equipment.

TfL is committed to improving road safety for all road users and addressing work

related road risk is a potentially effective way of improving road safety and reducing casualties among P2W riders and cyclists.

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