

Report

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Understanding Road Safety issues for Courier and Food Delivery Riders **Quantitative Research Report**

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1. EXECUTIVE SUMMARY

The London Road Safety Unit (LRSU) believe that addressing work related road safety issues is a potentially effective way of improving road safety and reducing casualties among cyclists and motorcyclists. Understanding the conditions under which courier riders, both cyclists and motorcyclists, operate in London and how this might affect their safety is therefore an important element to improve the road safety for those who ride professionally. Synovate have conducted a survey amongst courier and food delivery businesses to help understand these issues.

A quantitative research method has been used, based on telephone interviews with a sample of 155 individuals working in courier and food delivery companies.

The research has shown that the courier industry and the food delivery industry are very different and therefore this needs to be considered when Transport for London (TfL) and partner organisations are planning road safety initiatives.

The deployment of freelance riders is very common within the courier industry and this may drive an attitude amongst courier companies that road safety is the responsibility of the riders themselves. It is important that any road safety initiatives are aimed at both courier companies and the riders themselves.

Within the food delivery industry the vast majority of riders are contracted to the restaurant or franchise and in the vast majority of cases use machines provided by their employee. It is vital that initiatives are put in place that target the food delivery companies themselves and they can then educate their riders.

There is a real sense amongst delivery companies that other road users – cars, lorries, buses etc – need to be targeted to help improve the road safety of delivery riders.

The delivery companies had little awareness of organisations associated with road safety issues, which indicates a potential need for TfL and partner organisations such as the Despatch Association and the Police to develop programmes in this area.

Current awareness and understanding of the Courier Code is relatively low within the delivery industry, with the majority of the guidelines not yet being followed. The research indicates a need for greater awareness of the code, to help to communicate the benefits regarding road safety issues to courier companies.

Potential take-up of the Courier Code is low amongst food delivery companies, which indicates a perceived lack of relevance and a potential need to adapt the code, (maybe changing the name), to appeal to the food delivery sector.

2. INTRODUCTION

2.1 Background

The London Road Safety Unit (LRSU) has the primary responsibility for seeing that London achieves the Mayor of London's road casualty reduction targets by the year 2010. These targets include reductions of 50% for all killed and seriously injured (KSI) casualties compared with the baseline average for 1994-1998.

While casualty reductions have been achieved over recent years, LRSU continues to strive to improve road safety across London and for all road users. In particular, vulnerable road users such as cyclists and motorcyclists are at the heart of London's road safety policy. For this reason, LRSU monitors casualties amongst vulnerable road users separately and investigates how to improve and sustain their safety on London's roads.

A potentially effective way of improving road safety and reducing casualties among cyclists and motorcyclists is to address work related road safety issues. Previous research¹ indicates that company drivers have a collision liability which is about 50% higher compared to drivers who are otherwise similar (age, sex, mileage). Fatigue and drowsiness, time pressure, and distracting additional tasks have been identified as risk factors for work-related trips. These risk factors may not be reduced through additional training but could be addressed through improved conditions for work-related trips.

Previous market research² amongst courier riders (80 motorcyclists) in London indicates that the majority consider themselves to be more skilful than the average rider but the majority had been involved in a collision. It is important to understand the conditions under which courier riders, both cyclists and motorcyclists, operate in London and how this might affect their safety, in order to improve road safety for those who ride professionally.

Consequently the LRSU have specific objectives that are directly focused on courier businesses and other businesses which use cyclists and P2Ws in delivery functions. Therefore a research study has been conducted to meet these objectives.

In addition, this research study forms part of a broader exploratory research programme that TfL are embarking upon to gain greater understanding of how TfL currently interacts with, and can potentially interact with, London businesses. This programme will cover the breadth of businesses operating in the capital, and cover issues that impact on TfL overall and for specific group's business areas in particular.

¹ J Broughton, C Baughan, L Pearce, L Smith, G Buckle (2003): Work related road accidents. Prepared for Department for Transport, published by TfL.

² FDS International (2005): Power two wheeler user survey. Prepared for TfL

2.2 Business and research objectives

The overriding business objective for the LRSU and partner organisations is to...

“Reduce the number of rider casualties amongst the courier and food delivery industries”.

The associated research objectives are as follows;

- Profile the structure of the industry in terms of;
 - number of companies
 - number of ‘vehicles’ / riders deployed
 - number of trips
 - types of ‘vehicles’
 - types of deliveries undertaken
 - how delivery people are ‘employed’ (e.g. salary compared to freelance)
 - how delivery people are paid
- Gauge awareness and understanding of - and adherence to - Health & Safety legislation and legal requirements in relation to road safety.
- Understand the extent to which road safety is important to delivery businesses, and gauge what road safety practices are currently in place, including;
 - provide training to riders
 - recording of incidents
 - actions taken following incidents
 - resources used for road safety practices and initiatives
- Gauge awareness of TfL, amongst courier and other P2W delivery businesses, understand how TfL impacts on their business and assess enthusiasm for using TfL and other organisations such as Despatch Association and the Police as a resource for road safety issues.

3. METHODS

3.1 Data collection

We conducted a total of 155 computer aided telephone interviews (CATI) amongst London-based courier (document / package delivery) and food delivery companies. We interviewed a total of 55 courier businesses and 100 food delivery companies.

All interviewing was conducted in-house by fully trained Synovate interviewers.

The interviews lasted on average twelve minutes and were conducted with the most suitable person within the organisation (*see section 3.2*). We adopted a system of call-backs and referrals to ensure that we interviewed the most relevant person within each organisation and to ensure we managed our sample in the most effective way.

Fieldwork was conducted in May-June 2006 (courier businesses) and August 2006 (food delivery businesses).

3.2 Sample

Interviews were conducted with the person within the business with the most knowledge of the transport, training, records and policies. This meant a range of different positions / job titles dependent on the size and type of the company. For example; Managing Director, Director, General Manager, Operations Manager, Fleet Manager, Control Manager, Despatch Supervisor, Transport Manager.

The businesses in our sample were selected randomly from the entire universe of delivery companies operating in London. To obtain the entire universe of delivery companies we used Experian to source business lists within the following categories;

COURIER COMPANIES (total sample = 688 businesses)

Yell Directory

Courier services (08612)

Delivery and collection services (02288)

Freight forwarding & storage (03550)

Distribution services (00355)

Shipping and forwarding agents (07091)

Thomson Directory

Courier and messenger services (22620)

Delivery services (24510)

Distribution services (26450)

Freight forwarders (37840)

FOOD DELIVERY COMPANIES (total sample = 5320 businesses)

Yell Directory

Take away food (08366)

Food and drink delivered (00629)

Pizza delivery and takeaway (00280)

Sandwich shops and delivery (00519)

3.3 **Sample breakdown**

3.3.1 Courier Companies

Using the classifications listed in section 3.2 we sourced 688 companies from which to recruit our courier sample. We found, however, that approximately 80% of these companies were not eligible as they did not use any cycles or P2W in their business. This left us with a useable qualifying sample of around 130 courier businesses in London from which we recruited our 55 participating respondents (estimated response rate of 42%)

Given the small size of the total number of businesses available, we are sure that we have achieved a representative 'view', thereby giving us a robust enough sample size to accurately represent the market as a whole.

3.3.2 Food delivery companies

Using the sample classifications listed in section 3.2 we identified 5320 food delivery companies operating in London. Amongst the 1660 randomly selected companies we used, 69% did not deploy P2W or cycle riders. Out of the remaining 514 pieces of sample we achieved our target of 100 completed interviews with food delivery companies (estimated response rate of 19%)

We can estimate the size of the total number of 'food delivery companies that deploy P2W and cycle delivery riders' by assuming that 69% of businesses in our total sample of 5320 do not deploy riders. Therefore this gives us an estimated total quantity of around 1650 companies in London that do.

3.4 Reporting considerations

In this report we have analysed courier companies and companies in the food delivery sector separately because it became clear that there are a number of key differences exhibited between the two industries.

Within the courier industry, delivering 'goods' is the core business function whereas within the food delivery sector, delivery is of secondary importance to the quality of the food. This leads to very different expectations regarding delivery, both amongst end customers and also internally within the business. By comparing the two side by side we are able to better understand these key characteristics.

Given our relatively small sample of courier companies we are unable to make meaningful and statistically sound comparisons across sub-samples within the courier industry i.e. company size, number of deliveries etc. Likewise, within the food delivery sector, small base sizes make comparisons across potentially interesting sub-samples such as chain/ franchise in comparison to those that are independent statistically redundant.

We are also unable to look at companies who deploy cycle riders as an individual sub-set, again due to a low sample size. Throughout the report we have provided some figures regarding cycle delivery. When viewing this data it is important to consider the low sample sizes involved and to accept the results as 'indicative' rather than statistically representative.

3.5 Data analysis

Throughout the report we have tested for significant differences between our two samples; courier against food delivery. Where differences between the two sectors have been found to be significant we have marked this with a red circle on the relevant chart. This indicates a significant difference between the two sectors at the 95% level.

3.6 Terminology

Throughout the report, we will use the terms 'courier Company' and 'food delivery company' to refer to the two different sectors individually. The generic term 'delivery company' will be used to refer to our entire sample, both courier and food delivery companies.

Similarly, the term 'delivery riders' will be used as a generic term for all riders, whilst 'P2W riders' and 'cycle riders', will be used to distinguish between each specific type of delivery rider.

4. PROFILE OF DELIVERY COMPANIES

The tables below outline who we interviewed for this research. As previously mentioned we interviewed 55 courier companies and 100 food delivery companies.

Courier Companies

<i>Number of companies who deploy...</i>						
TOTAL	P2W riders	Cycle riders	Full time riders	Part time riders	Contracted riders	Freelance riders
55	53	25	48	22	16	44
	96%	45%	87%	40%	29%	80%

Food Delivery Companies

<i>Number of companies who deploy...</i>								
TOTAL	Franchise/chain	Other	P2W riders	Cycle riders	Full time riders	Part time riders	Contracted riders	Freelance riders
100	60	40	92	16	72	76	60	50
	60%	40%	92%	16%	72%	76%	60%	50%

4.1 Difference in profile between P2W and cycle riders

Almost all companies we interviewed deploy P2W riders (96% of couriers and 92% of food delivery companies). The number of companies deploying cyclists is considerably lower.

Courier companies

- 96% deploy P2W riders
- 45% deploy cycle riders
- 42% deploy both

Food delivery companies

- 92% deploy P2W riders

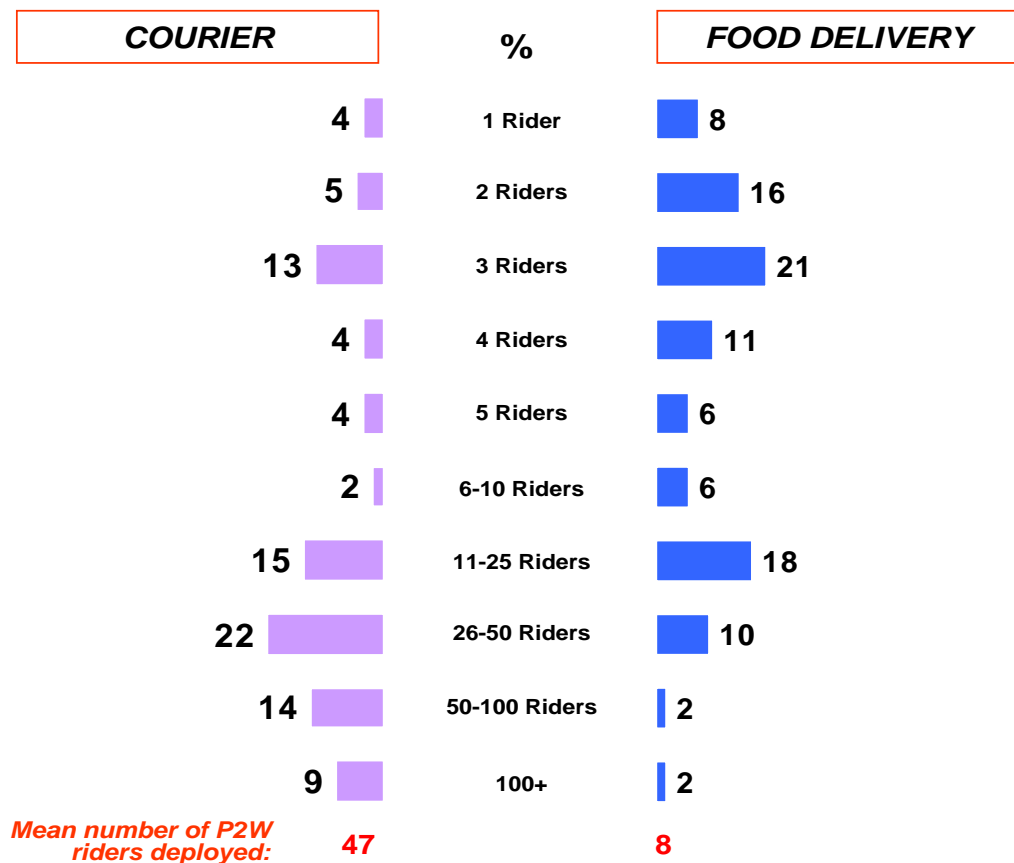
- 16% deploy cycle riders
- 8% deploy both

4.2 Number of riders

We asked respondents to state how many riders they deployed, both P2W and cyclists. The average number of P2W riders deployed per courier company is approximately forty seven, whilst food delivery companies deploy an average of eight P2W riders. However, this average is heavily influenced by a small number (n=13) of very large courier companies who deploy more than 50 riders. 26% of courier companies deploy less than five riders and this rises to 56% for food delivery companies.

How many P2W riders do courier companies and food delivery companies deploy?

- Percentage of companies who deploy the listed number of riders



Source: Q1a How many P2W riders does your company deploy or utilise?
 Base: Courier (55) Food delivery (100)
 OPEN QUESTION/ SINGLE RESPONSE

Amongst the small quantity of companies who deploy cycle riders, the mean number of riders is lower, with an average of ten being deployed by courier companies and only two by food delivery companies (*caution low base*).

Using our assumptions regarding the size of the total number available (see section 3.3) and the mean score above, we can attempt to estimate the number of P2W delivery riders that are currently deployed in London – 6,110 courier riders and 13,200 food delivery riders. Please note that these figures have been derived from estimated variables and therefore should be used as a rough guide only.

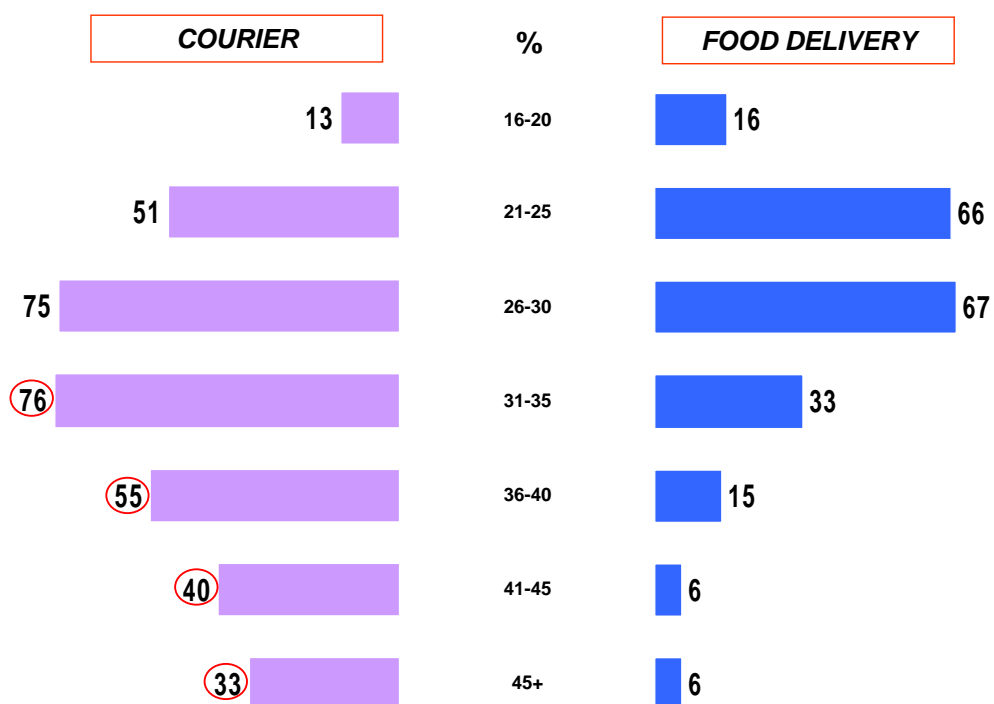
We can also estimate the total number of cycle delivery riders currently deployed in London – 585 courier cyclists and 528 food delivery cyclists. Again, please note that these figures have been derived from estimated variables and should be viewed accordingly

4.3 Age of riders

The profile of riders is generally younger amongst food delivery companies than courier companies. Courier companies have a broader spread of riders across the different age ranges, whilst those working for food delivery companies are significantly less likely to be aged over thirty.

What is the age profile of riders?

- Percentage of companies who deploy riders within the listed age ranges

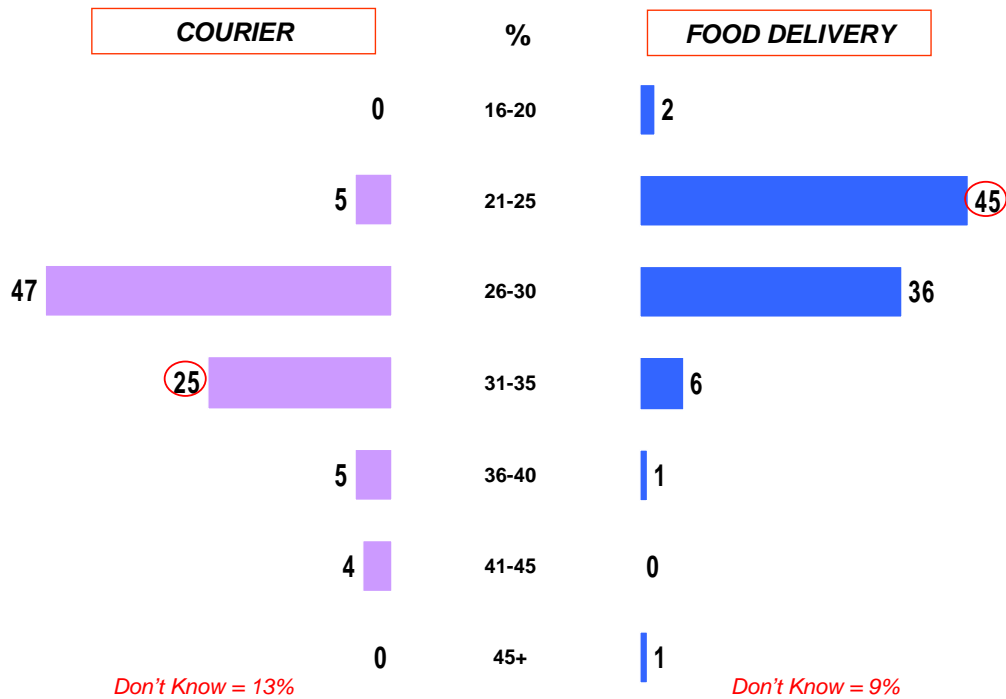


Source: Q10a which of the following age groups do they belong?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ MULTICODE

For nearly three quarters of courier companies, the majority of riders they deploy are aged between 26 and 35, whilst over three quarters of food delivery companies have the bulk of their riders aged between 21 and 30.

To which age group do the majority of delivery riders belong?

- Percentage of companies where the majority of delivery riders fall into the listed age ranges



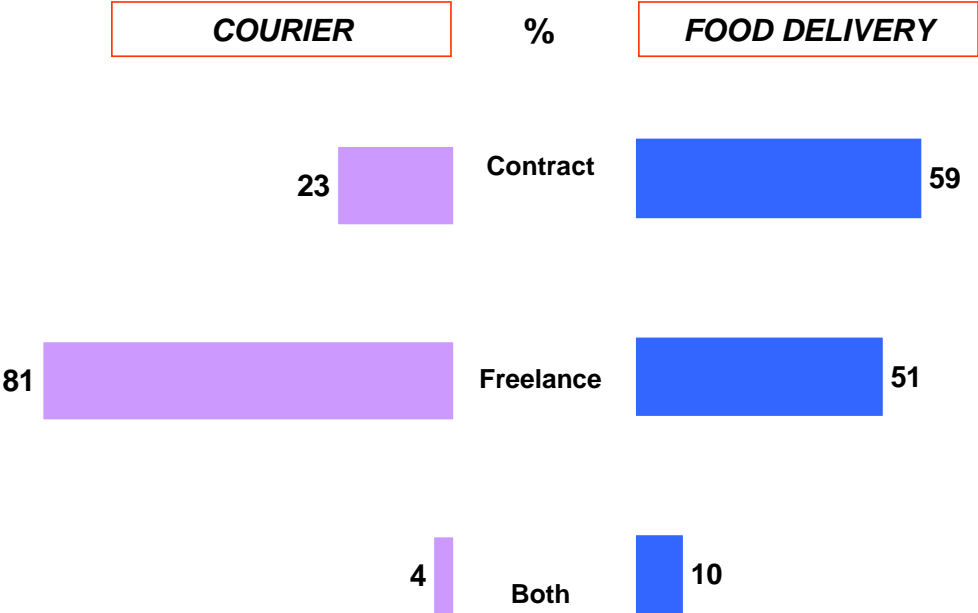
Source: Q10b Which age group do the majority of riders belong?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ SINGLECODE

4.4 Type of deployment – contract vs. freelance

There is a significant difference in the structure of the workforce with the vast majority of courier companies utilising freelance riders and only a quarter deploying contracted riders. Also, courier companies, in the main, only deploy *either* freelance riders or contracted riders with only 4% deploying both. Amongst food delivery companies, 59% deploy contracted staff and 51% deploy freelance.

Type of employment for P2W riders

- Percentage of companies who deploy P2W contract riders, P2W freelance riders and both



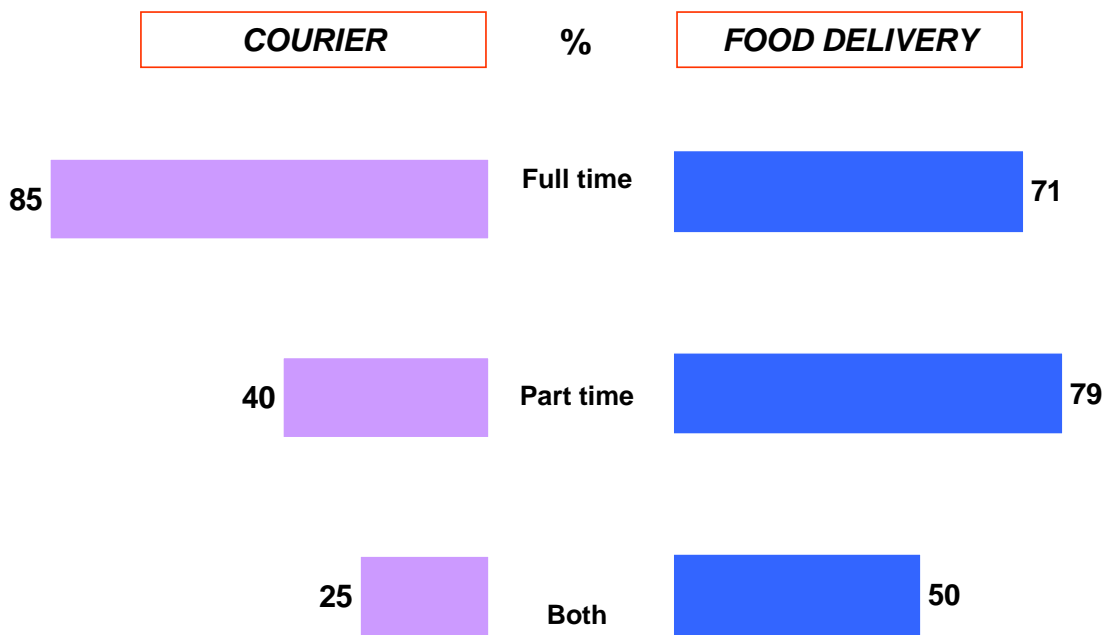
Source: Q3a How many of your P2W riders are contracted to your company and how many are freelance?
 Base: Courier (53) Food delivery (92)
 MULTICODE

4.5 Type of deployment - Full time vs. Part time

The bulk of courier riders are deployed full time, both P2W riders and cyclists, whereas food delivery P2W riders are more likely to be engaged on a part time basis. Less than half of courier companies deploy part time riders, whilst over three quarters of food delivery companies have part time riders. Half of food delivery companies deploy both full time and part time riders.

Type of deployment for P2W riders

- Percentage of companies who deploy full time P2W riders, part time P2W riders or both



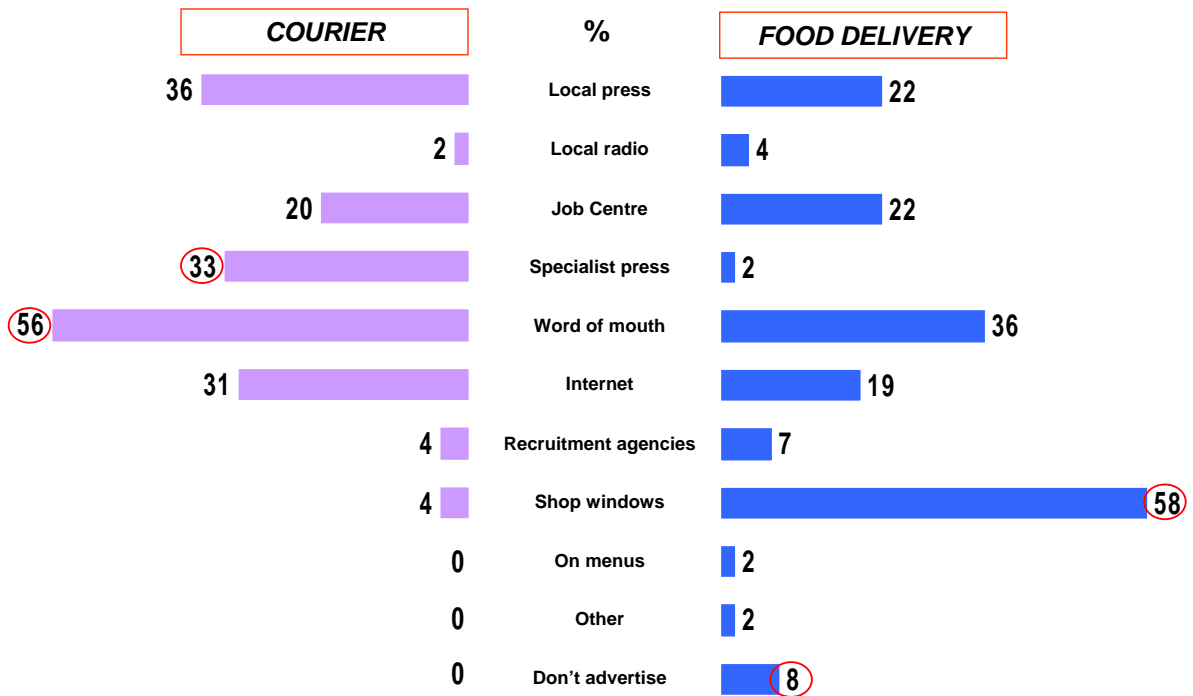
Source: Q2b How many of your P2W riders are deployed by your company full time/ part time?
 Base: Courier (53) Food delivery (92)
 MULTICODE

4.6 Recruitment channels

There are clear differences that emerge when we look at recruitment channels, which reflect the level of professionalism amongst our two samples. Over half of food delivery companies utilise shop window advertising as a means of recruitment. Food delivery companies also rely heavily on word of mouth, as do courier companies for whom this channel is used by over half. Press and the internet are also popular channels of recruitment for courier companies. The fact that the use of specialist press is almost exclusive to the courier industry indicates the greater degree of professionalism and experience that is required by courier companies compared to food delivery companies.

Where do companies recruit riders?

- Percentage of companies who use the listed channels for recruiting riders



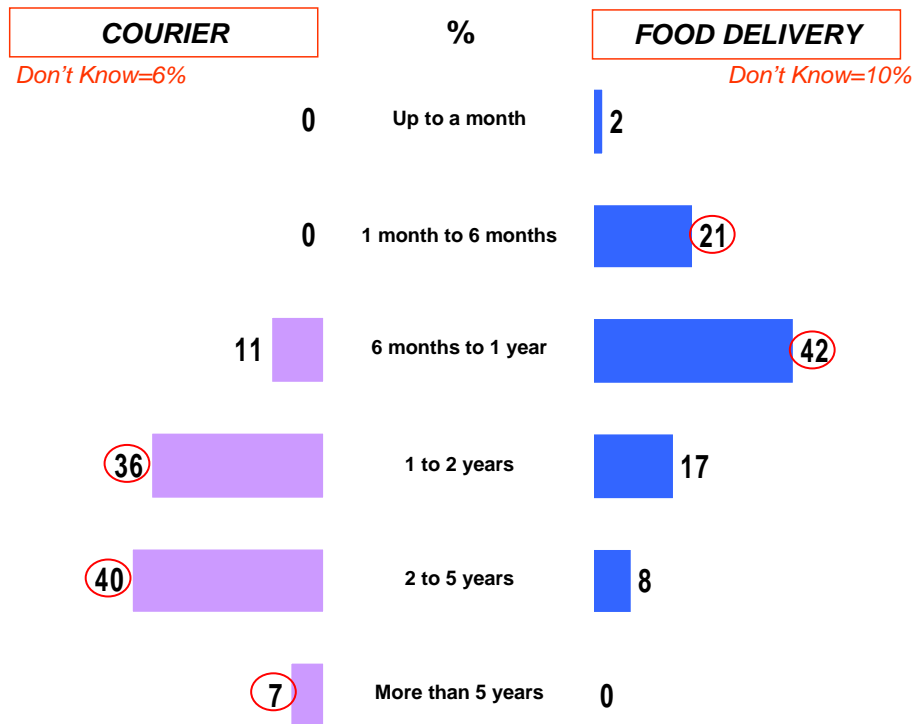
Source: Q10 Where do you advertise to recruit new riders?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ MULTICODE

4.7 Typical duration of employment

About two thirds of food delivery companies stated that their riders only stayed with them for up to one year and it is clearly a more transient industry than the courier industry, where over three quarters of courier companies state a usual deployment span of between 1 and 5 years for their riders.

How long are riders deployed for?

- Percentage of companies whose 'usual' rider deployment length is the listed time periods



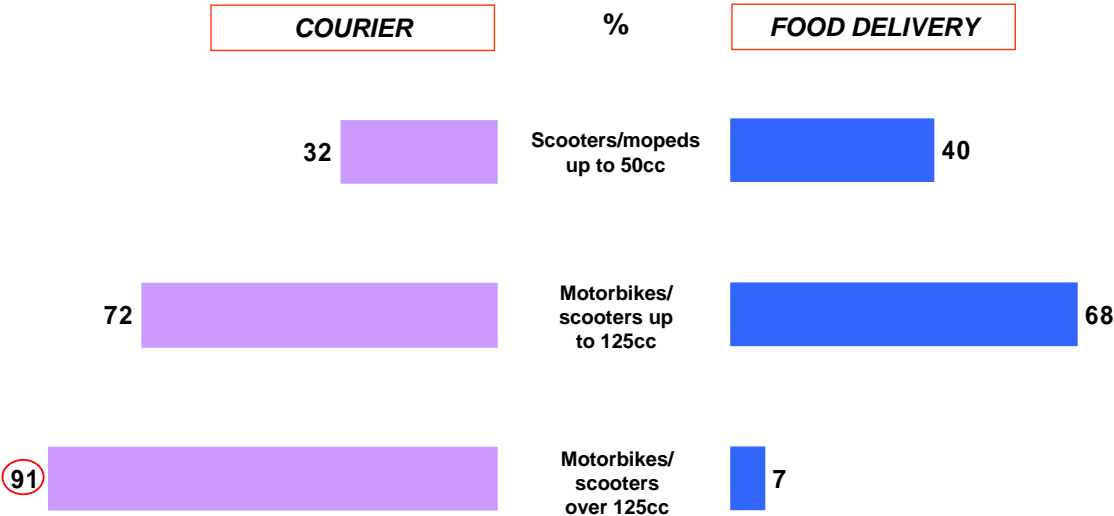
Source: Q15 What would you say was the usual length of time that riders tend to stay with your company?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ SINGLECODE

4.8 **Types of P2W machines being used**

The P2W vehicle types being used differ considerably between the two delivery sectors, with couriers, who tend to make deliveries over longer distances, favouring the larger more powerful bikes over 125cc, whilst food delivery companies who typically make their journeys within a much more localised area opting for vehicles less than 125cc. The chart below shows the percentage of companies who operate each type of vehicle.

Types of machines used by courier and food delivery P2W riders

- Percentage of companies who deploy P2W riders who ride the listed machines

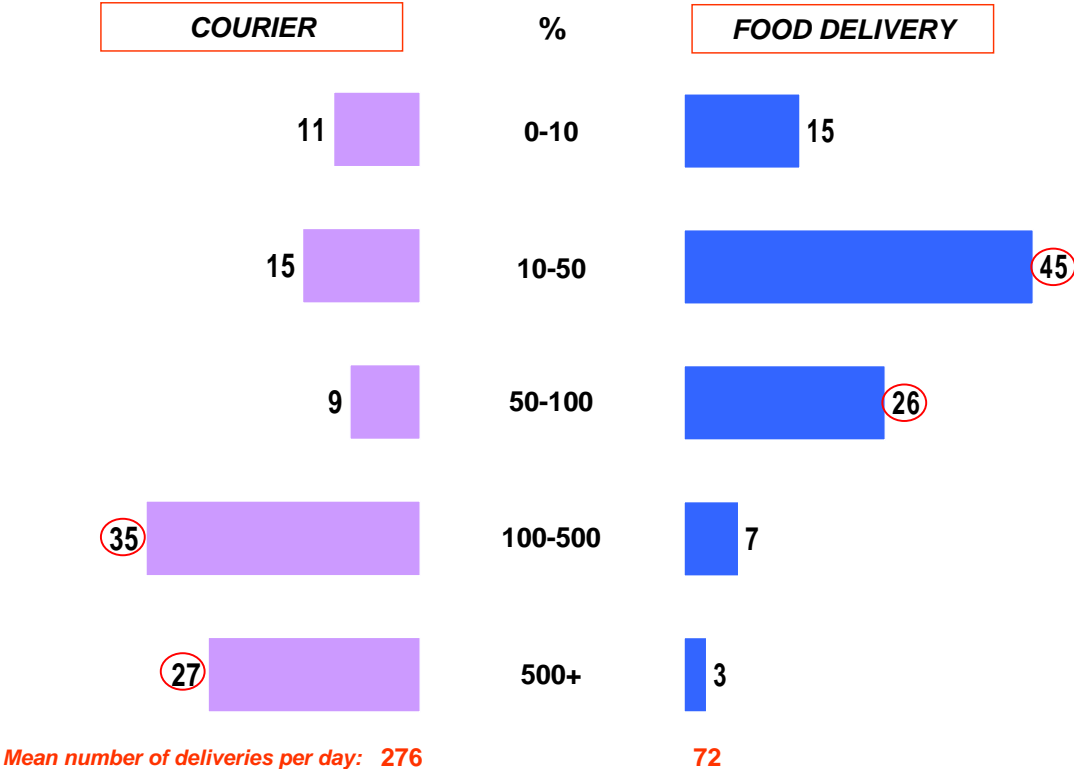


Source: Q8 Do your riders use the following types of machines?
 Base: Courier (53) Food delivery (92)
 PROMPTED

4.9 **Number of deliveries made per day**

The chart below gives an indication of the number of deliveries made each day. Over half of courier companies make over 100 deliveries per day. The majority (60%) of food delivery companies make less than 50 deliveries a day, with 15% making less than ten.

Number of deliveries made per day
 - Percentage of companies who make the listed number of deliveries per day



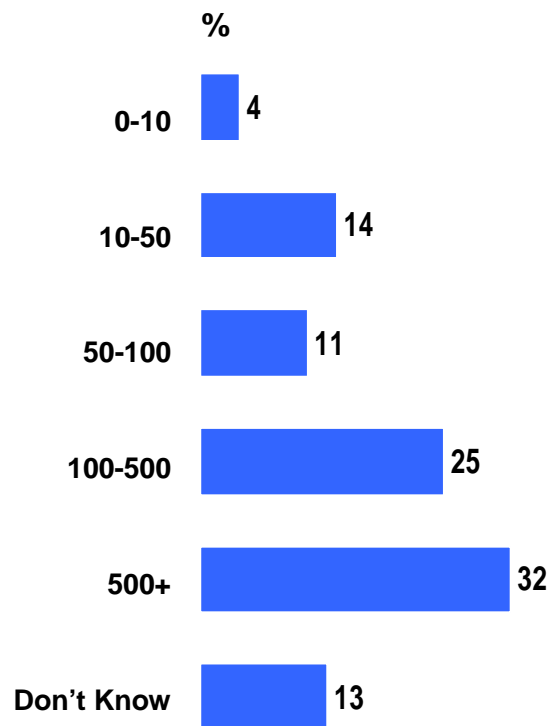
Source: Q6a Approximately how many deliveries does your company / branch make each day?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ SINGLECODE

4.10 Number of clients served (courier companies only)

The number of different clients that courier companies serve ranges from less than ten to in excess of 500. The average number of clients served by courier companies is approximately 308, but this is heavily influenced by a small number of very large courier companies.

How many clients do courier companies serve?

- Percentage of companies who serve the listed number of clients



Mean number of clients served: 308

Source: Q6b Approximately how many different clients does your company serve?
Base: Courier (56)
PROMPTED/ SINGLECODE

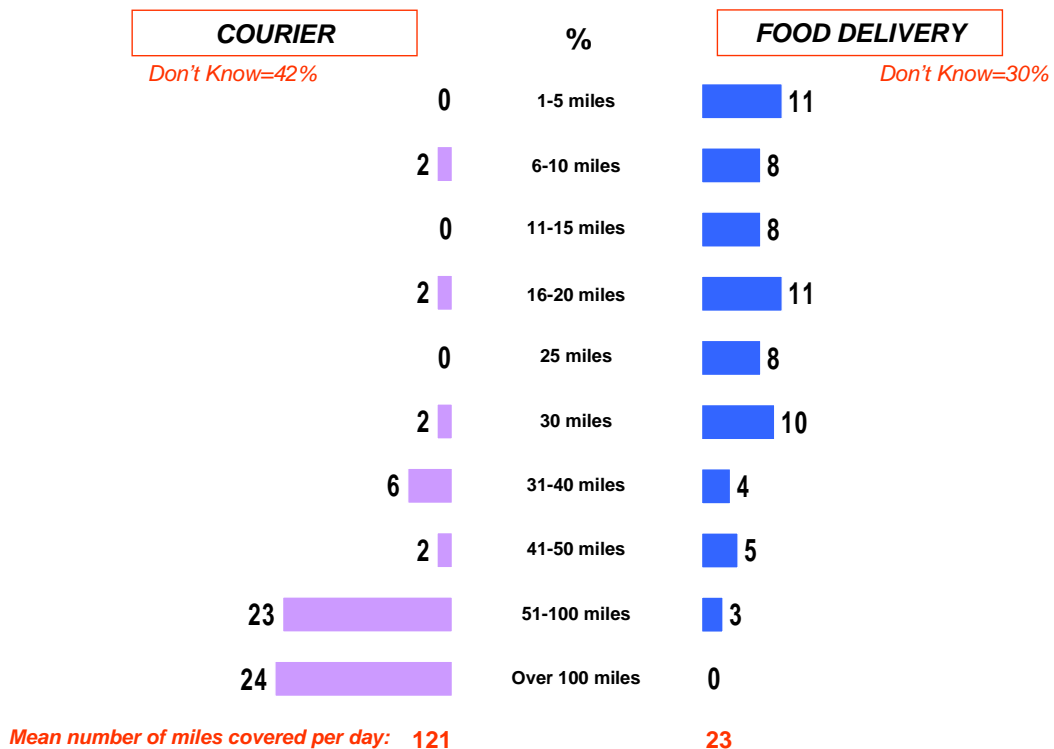
4.11 Typical mileage per day

For P2Ws a significantly different mileage is recorded between the two business types, courier riders covering an average 121 miles per shift and food delivery riders covering just 23 miles per shift. This is unsurprising given the localised nature of food delivery companies; over a quarter of courier riders cover more than 50 miles per shift. There was a relatively high amount of Don't Knows recorded at this question and this is probably because a number of respondents found it hard to average out the distance driven by the riders, especially if there are a lot of riders in an organisation all riding varying distances each day.

For cyclists, as would be expected the distances travelled are considerably less but the same difference between courier and food delivery is reflected.

How many miles are ridden per day by P2W riders?

- Percentage of companies whose average P2W rider mileage is the listed distances



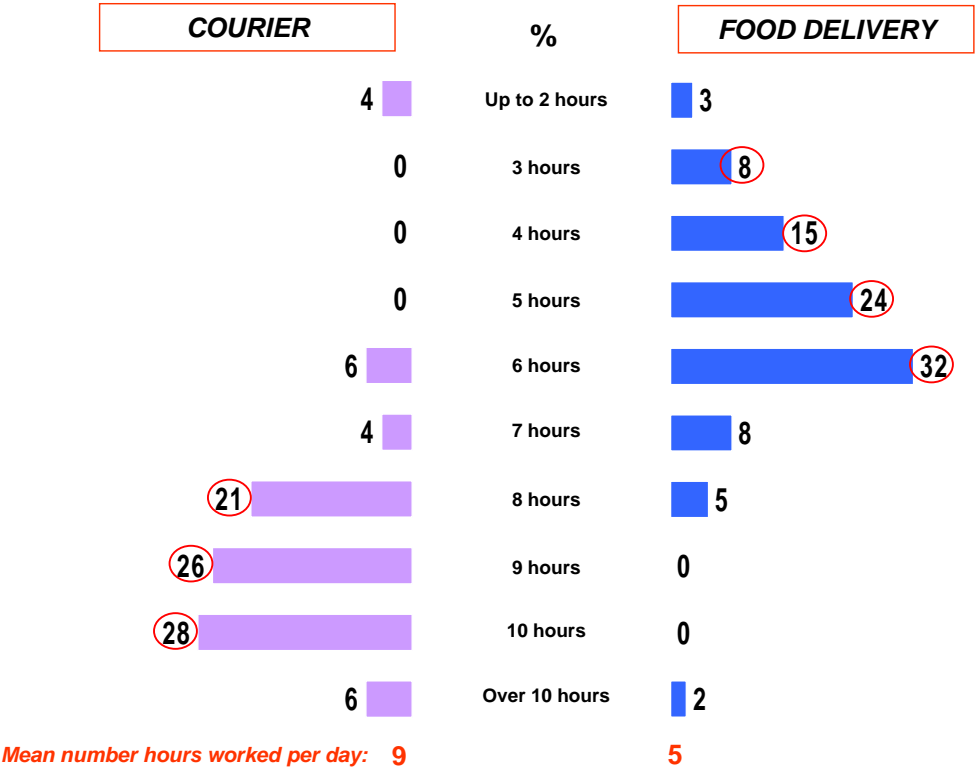
Source: Q13 What is the approximate mileage per P2W rider each shift?
 Base: Courier (53) Food delivery (92)
 OPEN QUESTION/ SINGLE RESPONSE

4.12 Working hours

Similarly to mileage, the number of hours worked per shift differs considerably between the two sectors, with food delivery riders tending to be deployed for shorter shifts of approximately 4-6 hours, corresponding to their peak delivery hours during the evening. Couriers, who typically work office hours, clock up an average of nine hours of riding per shift.

How many hours are worked per day per P2W riders?

- Percentage of companies whose average P2W rider hours per day are the listed hours



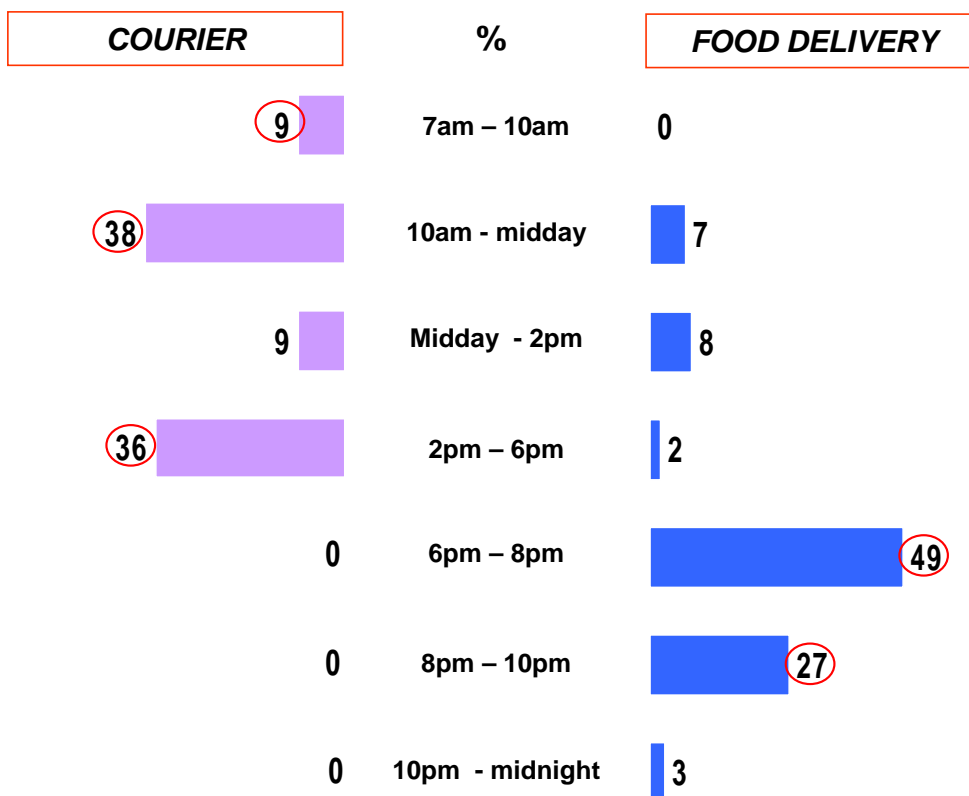
Source: Q12 Approximately how many hours does each P2W rider work each shift?
 Base: Courier (53) Food delivery (92)
 OPEN QUESTION/ SINGLE RESPONSE

4.13 Peak delivery periods

For food delivery companies the peak period of activity is from 6pm to 8pm, with over three quarters of food delivery saying that this is their busiest delivery time. This is to be expected for businesses largely catering to customers at home during meal times. Similarly, it is no surprise that couriers are far more active during business hours, with 10am – midday and 2pm – 6pm the busiest times. This would seem to have repercussions for safety, as couriers are far more likely to be travelling on the road during rush hour traffic periods and are more exposed to the risk of accidents as we shall see later. 67% of courier companies make deliveries 24 hours a day, compared to none of the food delivery companies we interviewed.

What are the peak delivery periods?

- Percentage of companies whose peak delivery periods fall into the listed time categories



Source: Q7 At what time of day would you say is your peak delivery period?
 Base: Courier (55) Food delivery (100)
 PROMPTED/ SINGLECODE

The difference in peak delivery hours between each sector suggests that the riders within each are subjected to different risks in regards to road safety. Possible areas of increased salience to courier riders would be issues regarding traffic management and riding in congested areas whilst poor visibility and avoidance of collisions at less

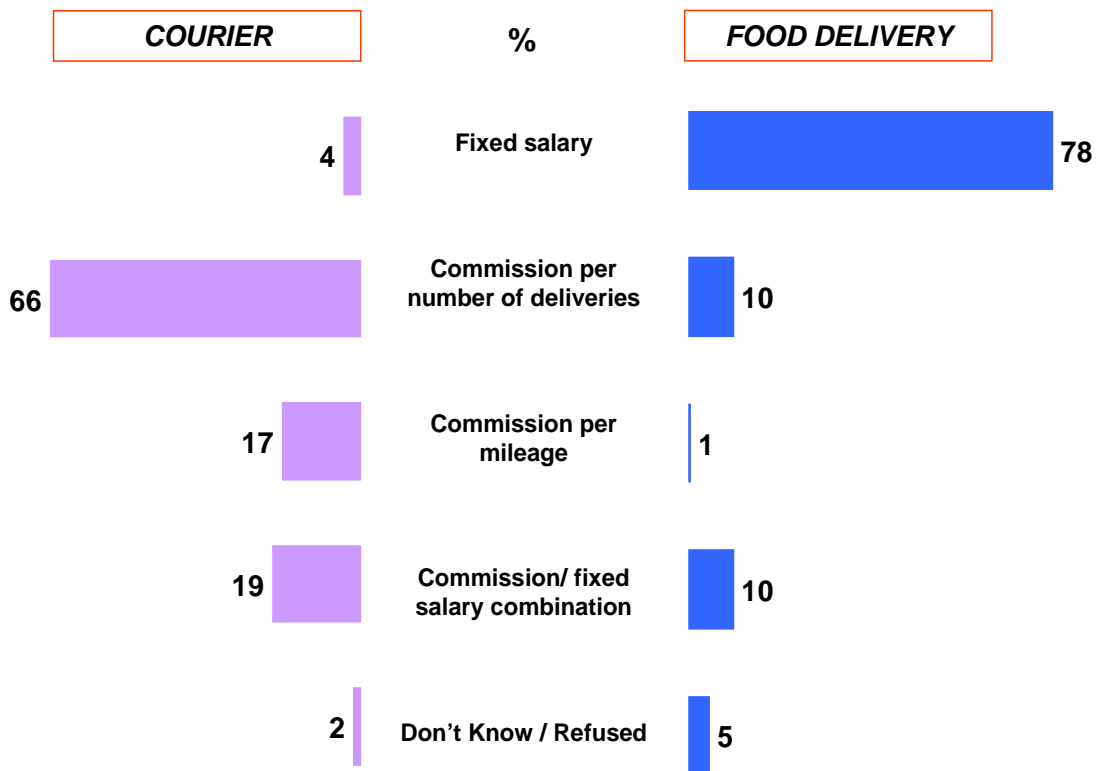
congested times when other road users are travelling faster are more relevant to food delivery riders.

4.14 Payment methods

The overwhelming method of payment for couriers is commission based, calculated in the main on the quantity of deliveries made or less often on mileage, with a further fifth having a combination of commission and fixed salary. This contrasts with the food delivery sector where three quarters of companies remunerate their staff solely in the form of fixed salary.

How do companies pay their riders?

- Percentage of companies whose riders are paid in the listed ways



Source: Q14 In what ways are your riders in your company paid?
 Base: Courier (55) Food delivery (100)
 PROMPTED/MULTICODE

Time limits on deliveries are imposed by almost half of courier companies compared to just a third for food delivery. Of the courier companies that do this, the main method of enforcement is to deduct a payment (27%), followed by a verbal warning at 15%. This is not the case within the food delivery sector where in the majority of cases no penalties are imposed on drivers who do not meet these limits. It is feasible that this could create an environment within the courier industry where road safety issues are compromised in order to meet targets and avoid loss of income.

Although only a third of food delivery companies place a time limit on delivery this does not prove that riders in this sector are subject to any less time pressure. For food delivery companies, the delivery itself is only part of the process, along with the food preparation, and therefore it is not really possible to penalise the rider for late delivery as there may be many other factors involved. However, given that within the food delivery sector customer satisfaction with the product is paramount, the need to deliver the food quickly whilst still hot indicates that food delivery riders are still under high internal pressures to make the deliveries as quickly as possible.

5. AWARENESS OF AND ADHERENCE TO ROAD SAFETY ISSUES

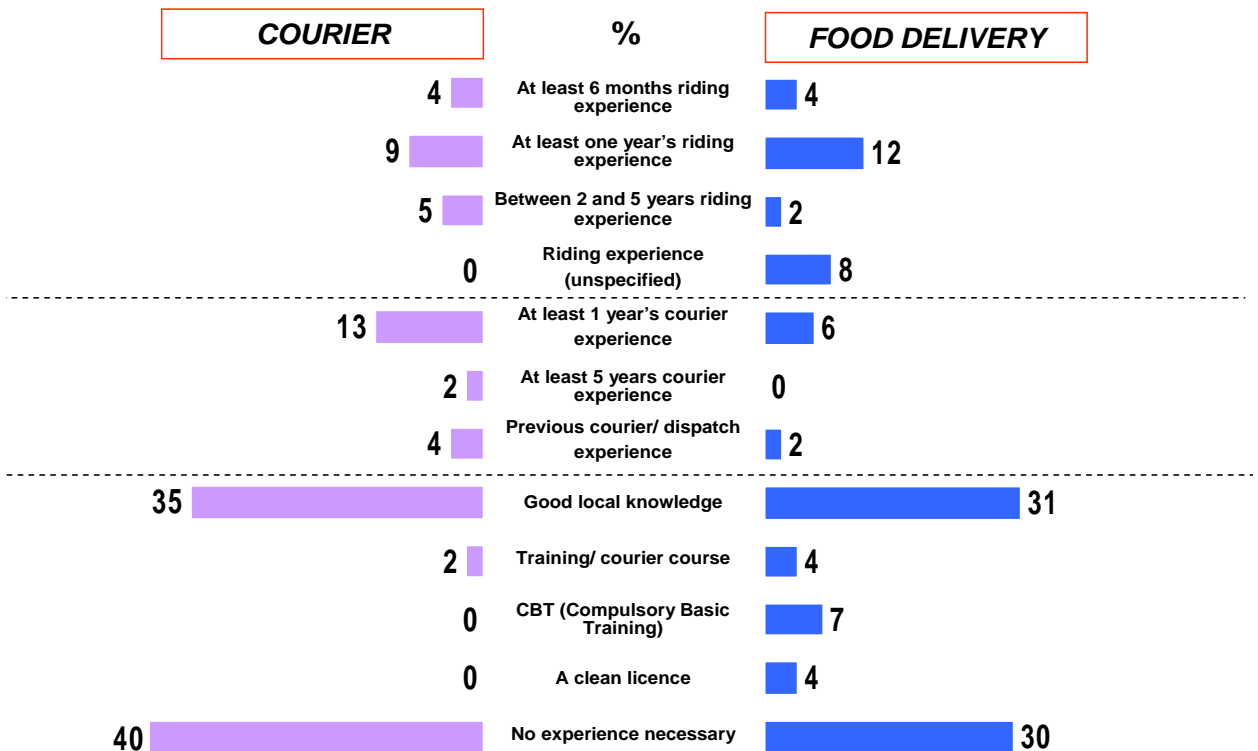
5.1 Required rider experience - general

In order to be eligible to commence work as a rider for either delivery sector, good local knowledge is the number one requested attribute, with around a third of respondents in both industries stating that this is required. Though some specify riding or courier experience of some kind, 40% of courier companies and about a third of those involved in food delivery do not require the prospective rider to have experience of any kind.

Whilst low base sizes do not allow for statistically robust comparisons within the courier industry, the research does indicate that within the larger courier operations a greater degree of experience, both riding and previous courier work, is required.

What experience are riders required to have?

- Percentage of companies who need their riders to have the listed types of experience



Source: Q11 What experience, if any, do your riders need to have before working for you?
 Base: Courier (55) Food delivery (100)
 UNPROMPTED/ MULTICODE

5.2 Licence types and checking procedures (P2W riders only)

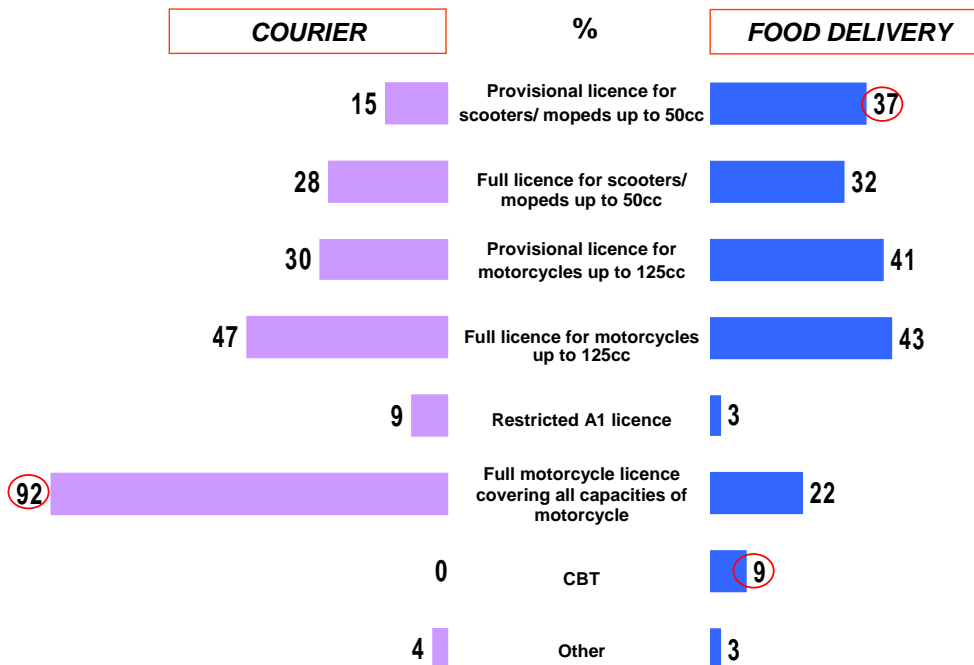
Over 60% of food delivery companies deploy riders who only have a provisional licence and just less than 1 in10 of food delivery companies deploy riders who only have a CBT qualification. The picture is more encouraging amongst courier companies, but even in this sector, over a third of companies deploy riders who hold provisional licences. Given that one of the key guidelines of the Courier Code is that all riders must hold full licences this is a particularly interesting statistic.

As expected, the type of licence held, in terms of engine power limit, reflects the type of vehicles used, i.e. there is greater use of 50cc vehicles amongst food delivery companies and therefore a higher proportion of companies in the food delivery sector who deploy staff who are only licenced to ride machines up to this power level.

What is interesting is that only 30% of courier companies require their riders to hold a clean driving licence whilst 70% of food delivery companies have the same requirement.

Type of licences held by P2W riders

- Percentage of companies whose riders have the listed types of licences

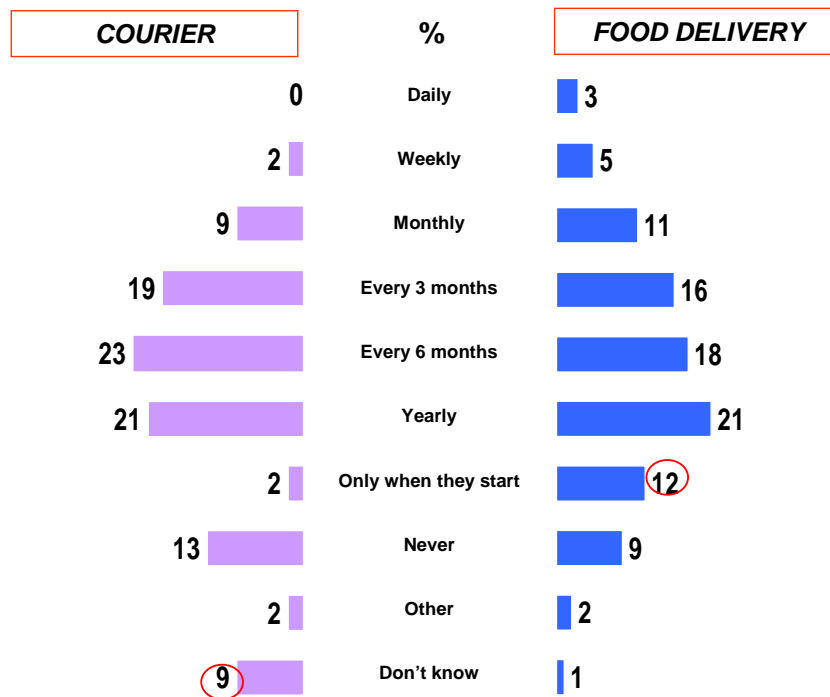


Source: Q9 Which types of license do your P2W riders hold?
 Base: Courier (53) Food delivery (92)
 PROMPTED/ MULTICODE

The frequency of licence checks varies considerably from company to company with no industry wide policy appearing to exist, or any real differences exhibited between courier companies and food delivery companies. Whilst the majority are inspected more often than once a year, a fifth of licences are only checked annually. Around a tenth of food delivery riders only have their licences inspected upon starting but this can be partially explained when their much shorter employment duration is taken into account. What is worrying is that 13% of courier companies and 9% of food delivery companies maintain to never check the licences of their riders.

How often companies check P2W riders' licences

- Percentage of companies check their riders licences at the listed intervals



Source: Q9c How regularly do you check the licenses of your riders?
 Base: Courier (53) Food delivery (92)
 UNPROMPTED/ SINGLECODE

Amongst those companies who do not insist on their riders having a clean licence, the vast majority stated that six points is the maximum they allow their P2W riders to have at any one time.

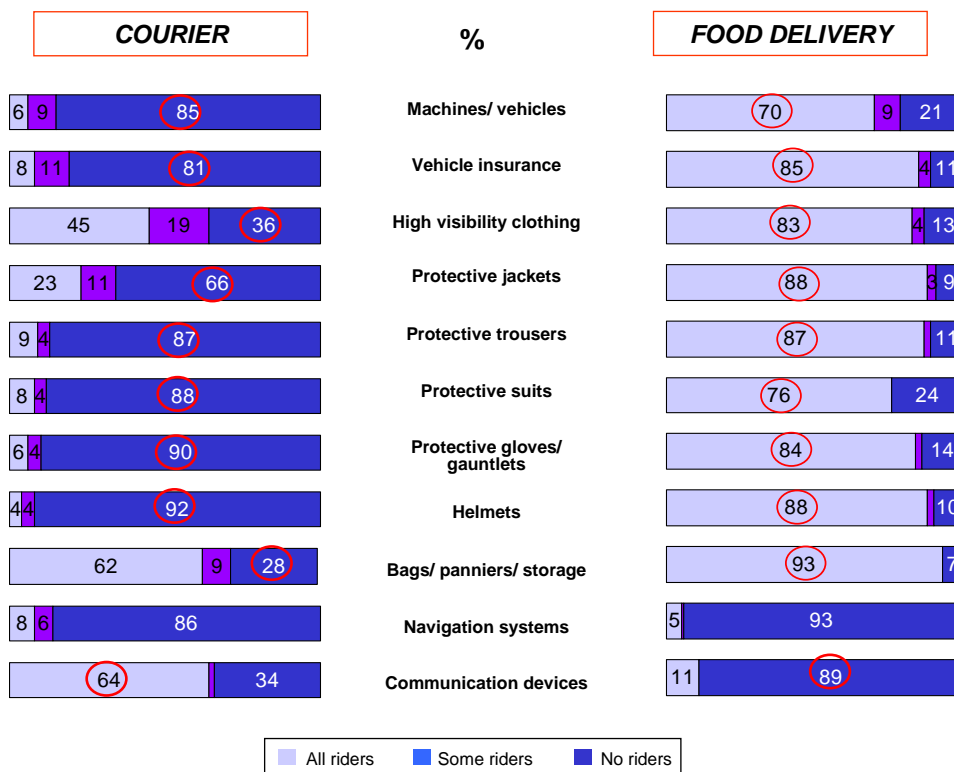
5.3 Equipment provided to riders

The quantity and type of equipment, including safety equipment differs significantly between the two industries, with food delivery personnel far more likely to have most of their equipment provided. In general, courier companies utilise more experienced riders on a freelance basis, therefore there is greater assumption that provision of equipment is the responsibility of the rider, plus a much greater likelihood that their employees will already own the equipment. Food delivery companies are far less likely to deploy specialist experienced riders and the majority may feel a responsibility to provide their riders with the necessary equipment. Courier companies in general do provide their riders with more specialised ‘delivery’ equipment like bags and panniers and communication devices which are needed to manage pick-ups and drop-offs.

The chart below shows the percentage of companies who provide “All” of their riders, “some” of their riders or “none” of their riders with different types of equipment.

What equipment is provided to riders?

- Percentage of companies who provide the listed types of equipment to riders (All riders, some riders, no riders)

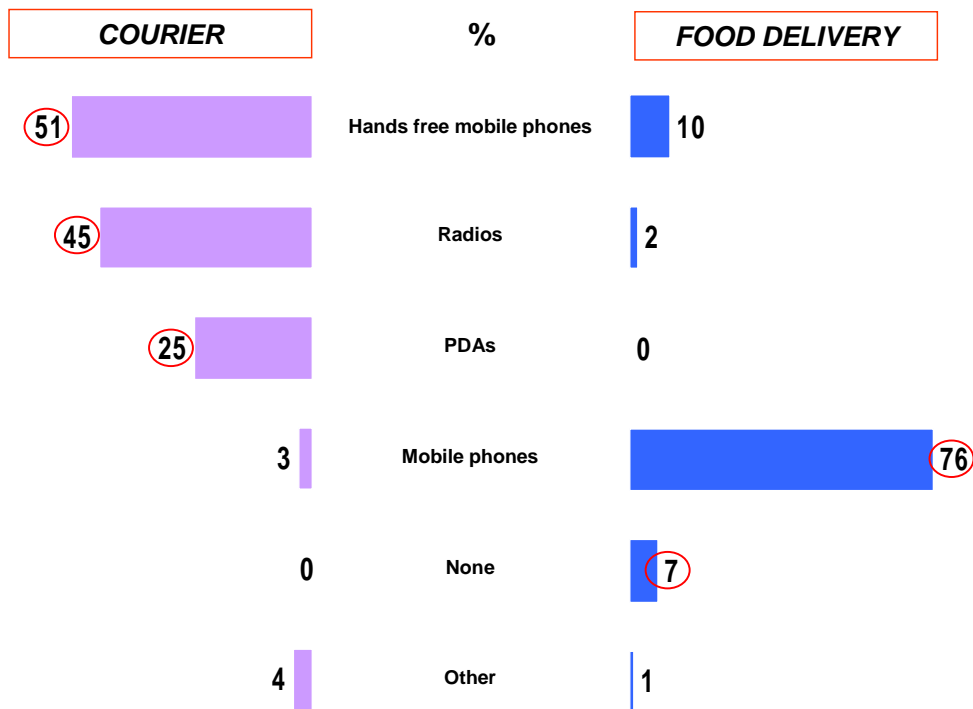


Source: Q16 Do you supply your P2W riders with any of the following?
 Base: Couriers (55) Food delivery (100)
 PROMPTED/ SINGLECODE FOR EACH STATEMENT

Half of all courier companies issue their riders with hands free mobile phones, significantly higher than food delivery companies (10%), where three quarters of riders are equipped with a regular mobile phone only. However, whilst we have no anecdotal evidence, it is highly unlikely that riders will use mobile phones, both regular or hands-free whilst riding as much for practical as well as safety reasons

What communication devices do riders use?

- Percentage of companies who provide their riders with the listed communication devices



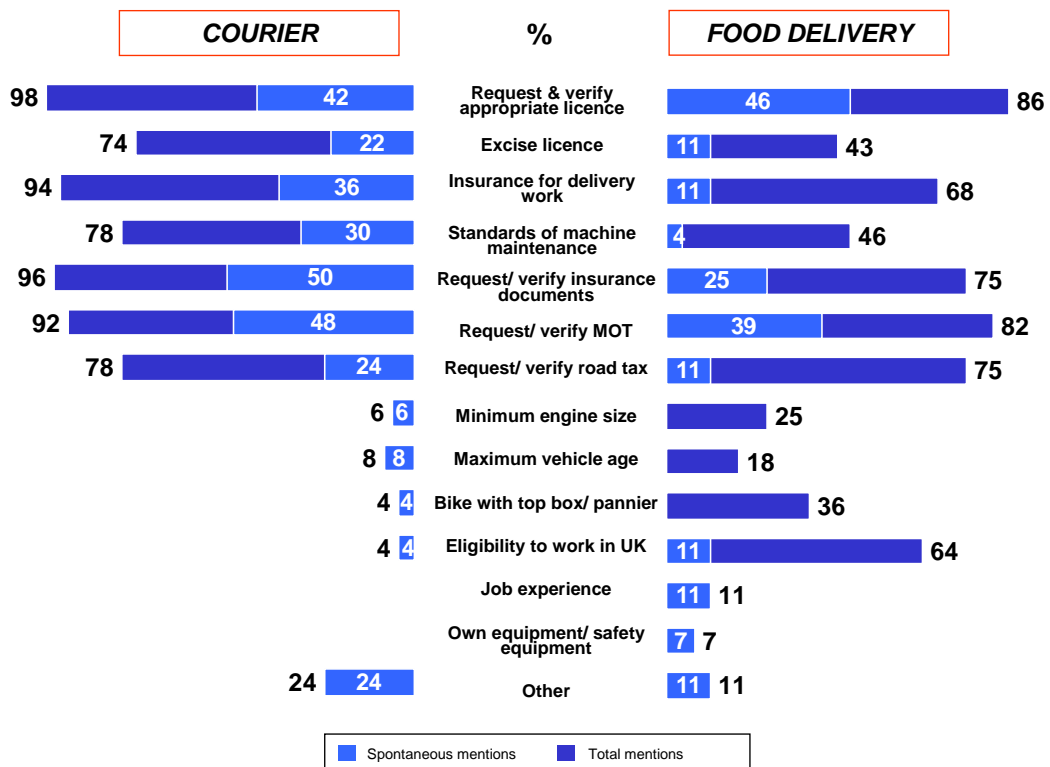
Source: Q16b What forms of communication devices do your riders use?
 Base: Courier (55) Food delivery (100)
 UNPROMTPED/ MULTICODE

5.4 Requirements for P2W and cycle owners

In addition to the above, those riders who own their own vehicles have further demands placed upon them, as can be seen from the chart below. Appropriate licence types, insurance and proof of M.O.T. are almost universally required for P2W riders. As we would expect, the food delivery sector appears to be slightly less demanding in this area, probably because less riders own their own vehicles. The stipulations placed upon cycle owners are far more relaxed with cycle couriers not having to confirm to any standards regarding brakes, lights, reflectors etc, and this is reflected in our data. Despite standards of bicycle maintenance being the most mentioned requirement amongst courier companies who employ cycle riders, it was only mentioned by 39% of companies

What checks do companies make on P2W riders who have their own machines?

- Percentage of companies who make the listed checks to P2W riders who have their own machines
 - Caution: Low base (n=28) for Food delivery



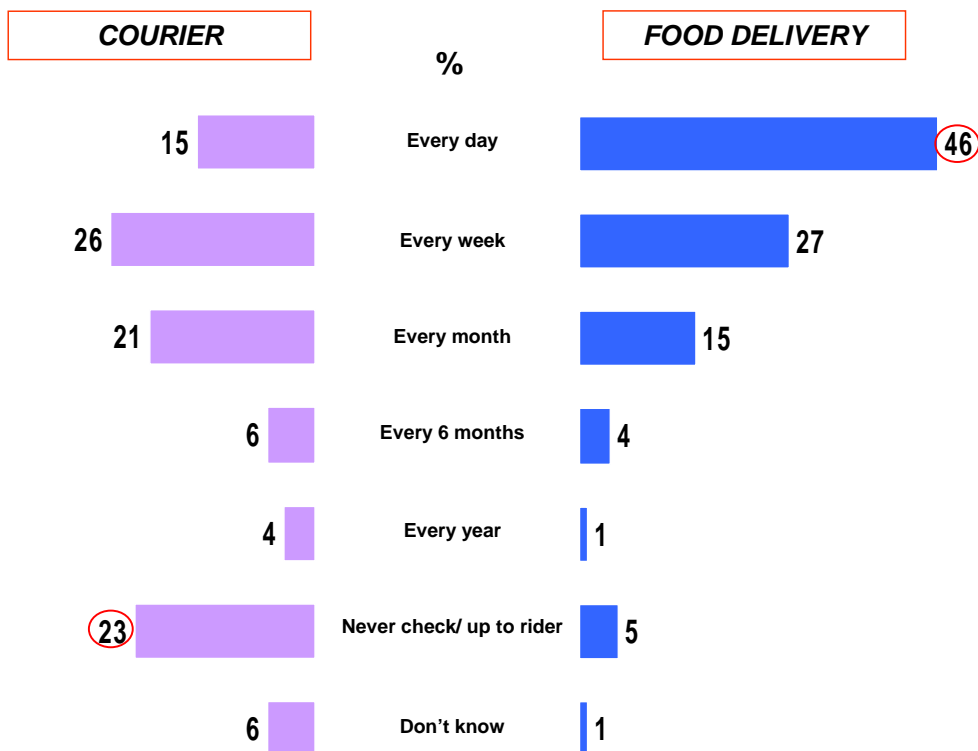
Source: Q17 What requirements do you specify that a rider has to have before they can start work for you?
 Base: Courier (50) Food delivery (28)*
 UNPROMPTED&PROMPTED/ MULTICODE

5.5 Existing health & safety practices and initiatives

As detailed in the chart below, inspections of P2W vehicles, or at the least, reminders given to riders to check their own vehicles, are significantly more likely to be carried out on a daily basis by companies within the food delivery sector – almost half state to do so, compared to just 15% for couriers. Furthermore, a fifth of courier companies never perform checks. However this can be attributed to the fact that the majority of courier riders use their own vehicles and so responsibility for the safety of machines is left up to them. On the other hand, food delivery companies are more likely to provide their riders with machines and therefore have a greater responsibility to ensure the machines they provide are roadworthy.

How often companies check the machines their P2W riders use?

- Percentage of companies who check their P2W riders' machines at the listed intervals



Source: Q19 How often do you check the vehicles that your P2W riders use or remind riders to check themselves to ensure they are roadworthy?
 Base: Courier (53) Food delivery (92)
 UNPROMPTED/ SINGLECODE

Just over half of courier companies who deploy cycle riders stated that they do not have any policies or practices in place to ensure that the bicycles used meet regulations in regard to brakes, lights and reflectors and are not in breach of the law. This compares unfavourably with the food delivery sector for which 81% of companies testify such policies exist (*caution: low base sizes for cyclist sample*).

For those respondents that answered that their company does check their riders' machines, an additional question was asked to try and identify how qualified the person responsible for checking the machines is. The most common response given by courier companies is industry mechanics (39%), but 37% stated that the person designated to check machines required no qualifications at all.

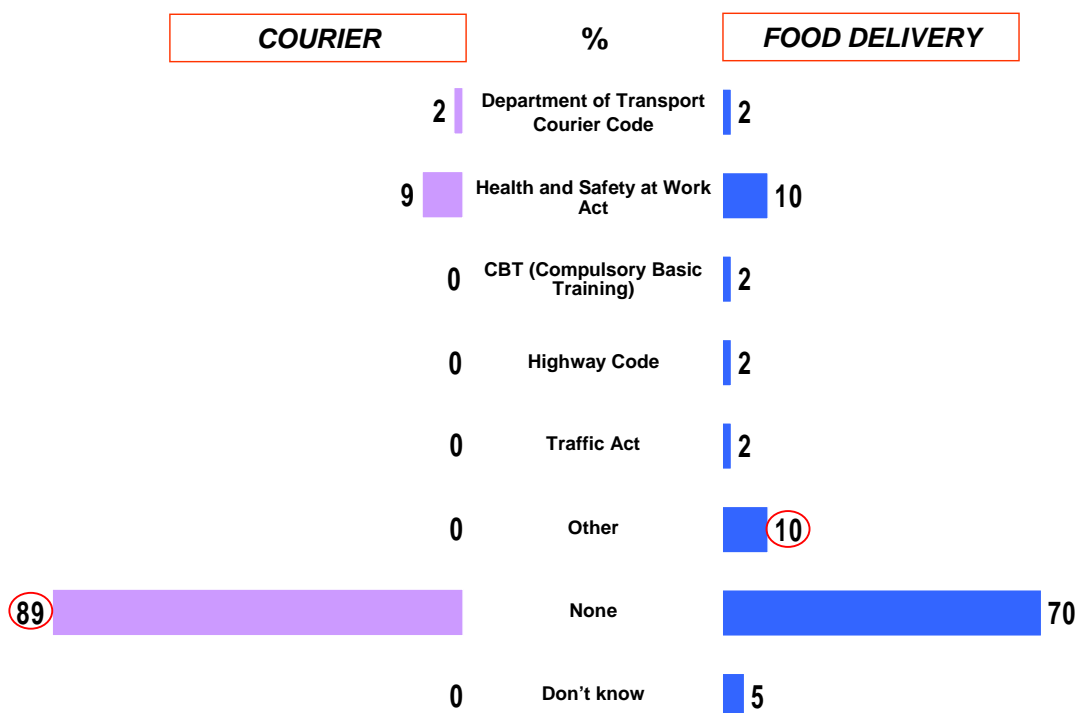
A similar pattern was exhibited within the food industry sector; however, there is a significantly lower percentage of unqualified staff (20%) allowed checking the machines.

5.6 Awareness of health & safety legislation

Unprompted awareness of any form of Health & Safety legislation is very low across both sectors, with courier companies significantly less likely to be aware of any legislation or guidelines at all. Spontaneous awareness of the Courier Code is almost non-existent, both within the courier industry and the food delivery sector.

Spontaneous awareness of government legislation regarding rider health and safety

- Percentage of companies who are aware of the listed organisations

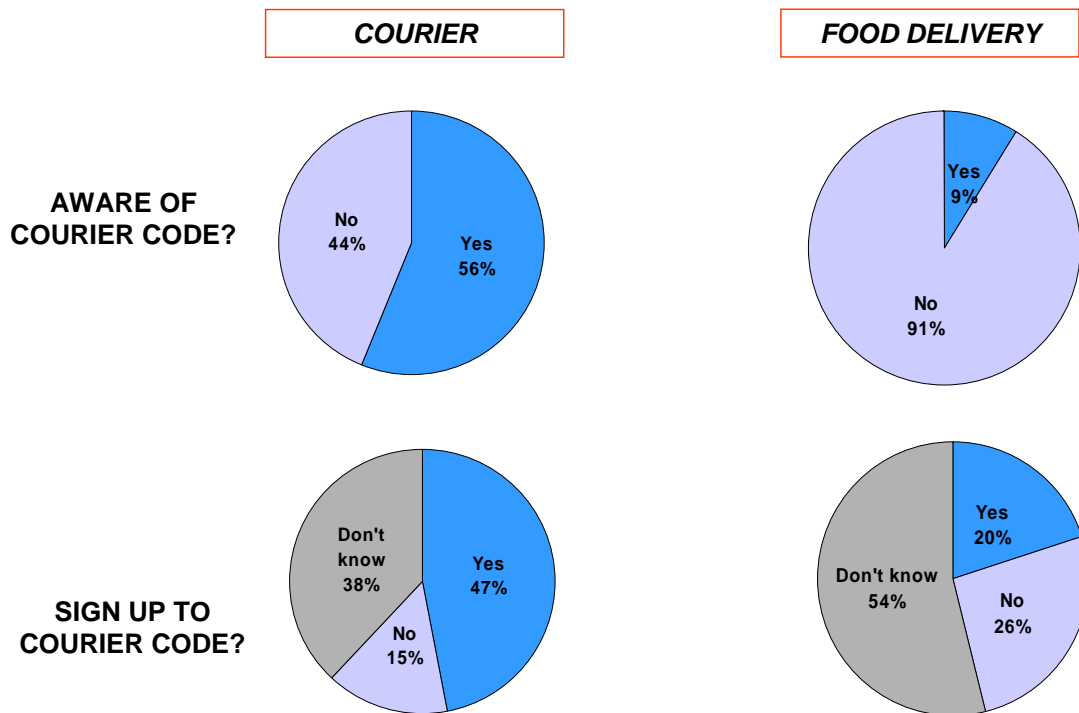


Source: Q20 What government legislation are you aware of regarding the health and safety of your riders?
 Base: Courier (55) Food delivery (100)
 UNPROMPTED/ MULTICODE

However, once prompted, just over half of courier companies stated they were aware of the Courier Code, though almost half of these have little or no understanding of the guidelines. For businesses within the food delivery sector there is much lower awareness and this is unsurprising given there has been little or no promotion of the Courier Code in this sector to date. Despite a lack of understanding of the Courier Code, half of all courier companies indicated a willingness to sign up to the code comparing favourably to just a fifth of food delivery businesses to agree to the same. One possible reason for the level of indifference amongst food delivery companies towards the code is the name itself, as the use of the term ‘courier’ suggests something that is specific to the courier industry and therefore not relevant to them.

Awareness and willingness to sign up to the Courier Code

- Percentage of companies who are aware of the Courier Code and who are prepared to sign up to the code



Source: Q20a Are you aware of Courier Code written by the Despatch Association and issued by the Department of Transport?
 Q20c Would your company be prepared to sign up to a code of conduct such as the Courier Code?
 Base: Q20a: Courier (54) FD (98) Q20c: Courier (55) FD (100)
 SINGLECODE

We also asked those respondents who were aware of the Courier Code, what it meant to them, and the most common responses were;

- Legislation that has to be adhered to
- Driver/ health & safety standards/ guidelines
- Deals with fair working practices e.g. working hours
- Rules/ code of conduct from Despatch Association

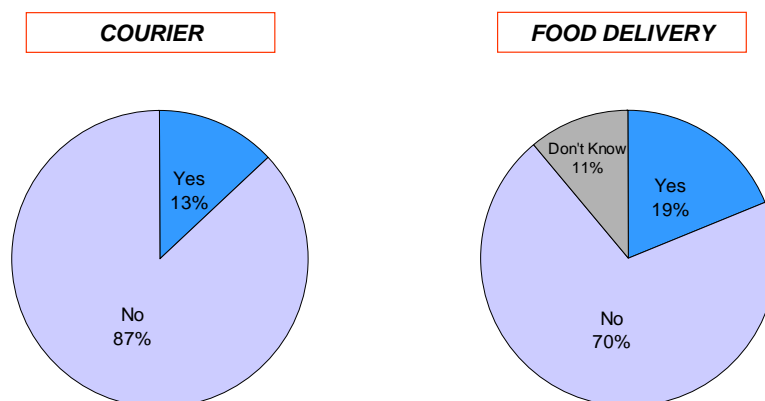
Please note the base for this question was low so we are unable to quantify the responses.

5.7 Incentives for training and improved riding standards

The number of companies offering incentives to riders to drive safely or improve their skills and standards by undertaking training schemes or gaining qualifications is relatively low with just over a tenth of courier companies stating this. For food delivery this is slightly higher with 1 in 5 companies maintaining their riders are offered incentives to improve their riding skills and standards.

Do companies offer incentives to riders (both P2W and cyclists) to improve skills and standards of riding?

- Percentage of companies who offer incentives to riders



Source: Q23 Do you offer your P2W riders and cyclists any incentives to improve their standards and skills by undertaking training or gaining qualifications?
Base: Courier (55) Food delivery (100)

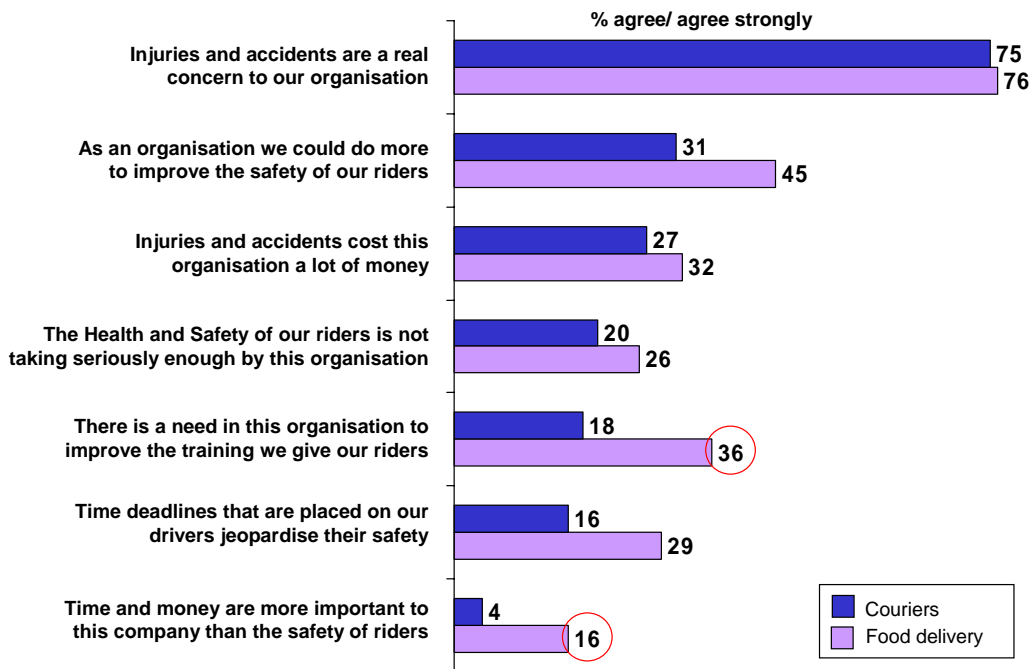
Amongst the small minority of companies that do offer such incentives, by far the most common is financial reward; either more money (in the vast majority of cases) or, exclusively in the case of couriers, by giving them extra or guaranteed jobs. Offering free training courses is also something that was mentioned by a handful of respondents.

5.8 Importance of road safety to business

Respondents were asked to indicate their level of agreement to a series of statements on a five point scale ranging from strongly disagree through to strongly agree. The chart below shows the percentage of companies who answered either 'Agree' or 'Agree strongly' with each statement. The main thing that can be observed from this chart is that, whilst there is a high level of agreement for all that *injuries and accidents are a real concern to the organisation*, the majority of respondents do not agree that their organisation *needs to do more to improve the health and safety of riders* or that *the issue of health and safety should be taken more seriously*.

Level of agreement on statements regarding health and safety of riders

- Percentage of companies who agree or agree strongly with each statement



Source: Q30 Please indicate your level of agreement with the following statements?
 Base: Courier (55) Food delivery (100)
 SINGLECODE FOR EACH STATEMENT

What is interesting is that the data suggests there is higher recognition within the food delivery sector that more needs to be done to improve the safety of riders than amongst courier companies. This is indicated by the fact that there is a higher level of agreement on all statements and a significantly higher level agreement on, *there is a need in this organisation to improve the training we give our riders* and *time and money are more important to this company than the safety of our riders*.

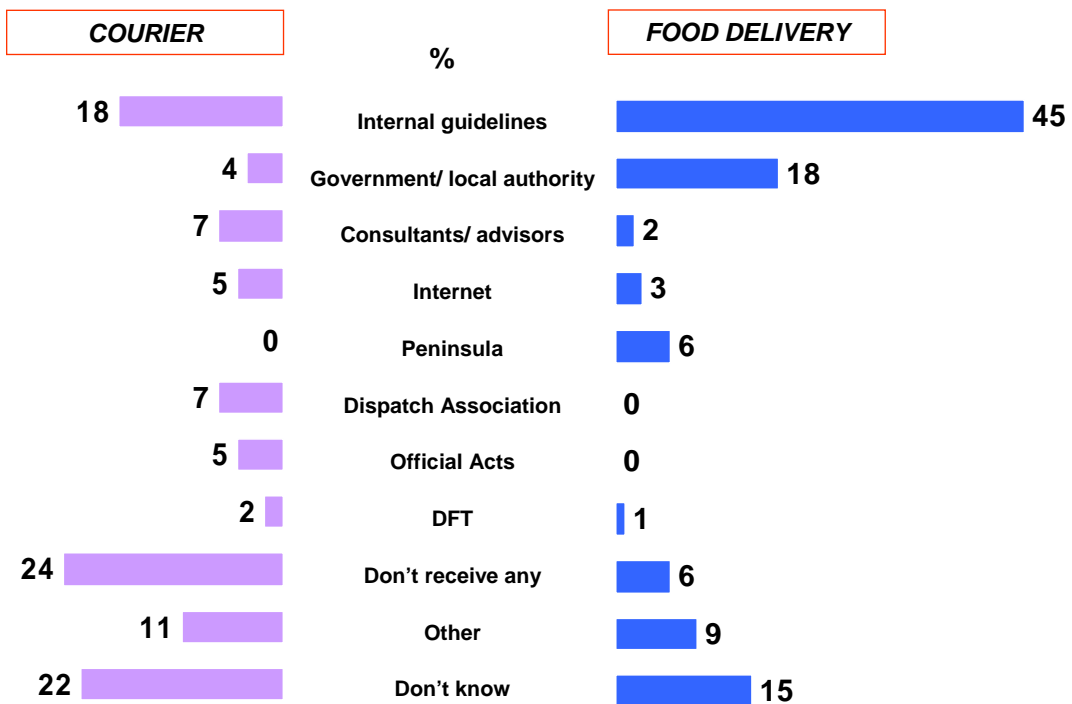
What this possibly indicates is that within the courier industry, where there is a heavy reliance on freelance employees (*see section 4.4*), there is a groundswell of opinion that the responsibility lies with the riders themselves especially if the expectation amongst courier companies is that they are deploying well trained and experienced riders. In addition to this, the freelance courier riders themselves may not be overly positive towards external interference in training and road safety issues.

5.9 Sources for road/ health and safety information

The chart below gives an indication as to the challenges facing TfL and other organisations, showing an absence of consistency in regards to where companies source health and safety information. Within the food delivery sector, a significant 45% state they obtain information from their own existing internal guidelines, rather than from any accredited official source, whilst just under 1 in 5 respondents said they received information from Government or Local Authority. Almost half of courier companies stated that they either didn't know where they got their information from or that they didn't get information from any where at all with only 7% stating they receive information from the Despatch Association.

Where do businesses receive information regarding Health and Safety legislation and Road Safety issues?

- Percentage of companies who receive information from the listed sources



Source: Q20d From where or whom do you receive information regarding health and safety legislation?
 Base: Courier (55) Food delivery (100)
 UNPROMPTED/ MULTICODE

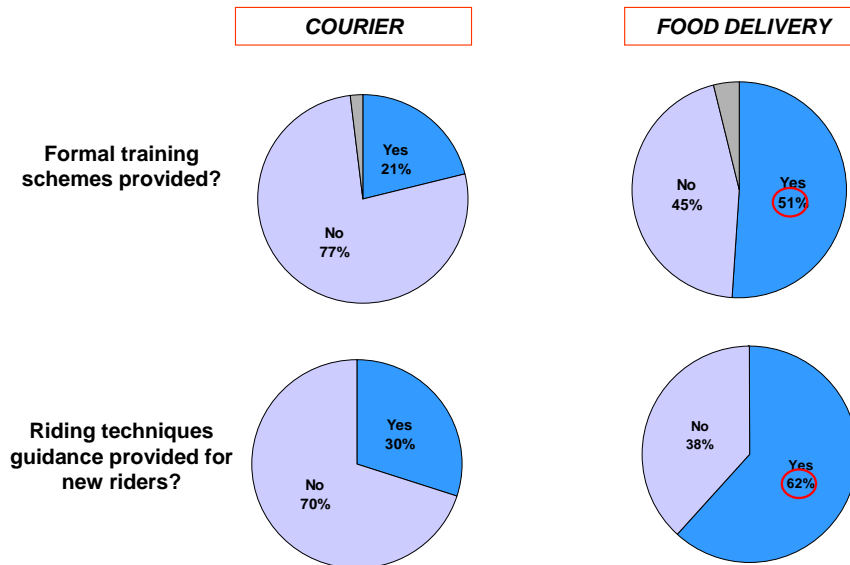
One possible conclusion that may be drawn from this is that there is a need for the provision of information regarding Health and Safety to be produced and provided to companies by organisations like TfL and partners such as the Police and the Despatch Association to enable companies to better understand what is required of them in this area.

5.10 Awareness and provision of training

We asked respondents if their company provided any formal training schemes or if they gave guidance to their riders on riding techniques.

Do companies provide any formal training or guidelines for their P2W riders?

- Percentage of companies who provide formal training schemes or guidelines on riding techniques



Source: Q21a Does your company have any formal training schemes in place for your riders?
Q21b Do you provide new riders with guidance on riding techniques for safety?
Base: Courier (53) Food delivery (92)
SINGLECODE

What we find from the data is that there are a significantly higher proportion of food delivery companies who state they offer both formal training schemes and guidance to their riders than their counterparts within the courier industry. Over half of food delivery companies answered that they offer formal training schemes compared to only 21% of courier companies.

The explanation for relatively low result amongst courier companies is again based largely on the fact that the vast majority of companies we interviewed deploy freelance riders (see section 4.4). Therefore, as we have already seen, there is a sense amongst respondents in courier companies that training schemes and guidance are not something that is their own or their companies' responsibility. Additionally, it is clear that because courier companies, in the main, deploy more experienced and more qualified riders there is a feeling amongst this sector that riders should be of a high enough standard to not require any additional training and may not even welcome it. Conversely, food delivery companies are more likely to deploy riders with little or no experience and therefore training and guidance is considered far more necessary and welcomed by the riders.

When asked what specific training or guidance was provided to riders, companies (without prompting) gave a wide range of answers, the most commonly mentioned being the following;

- Send riders on Training courses/ to riding school
- On the job training or mentoring/ working with more experienced staff
- Help and guidance with routes/ knowledge of local area/ maps
- Provision of booklets, pamphlets or training manuals (especially amongst courier companies)

A similar trend was exhibited regarding the amount and types of training and guidance provided to cyclists as seen for P2W riders.

5.11 **BikeSafe**

Awareness of BikeSafe, the rider skills day organised by TfL and the Police, is significantly higher amongst courier companies than food delivery companies. Just under half (45%) of respondents from our courier sample had heard of BikeSafe compared to 18% of food delivery respondents.

Out of the twenty four courier companies who were aware of the scheme, only six deployed riders who had actually attended (equates to 11% of all courier companies in our sample). Similarly, six of the eighteen food delivery companies who had heard of the scheme deployed riders who had attended (equates to 6% of all food delivery companies in our sample).

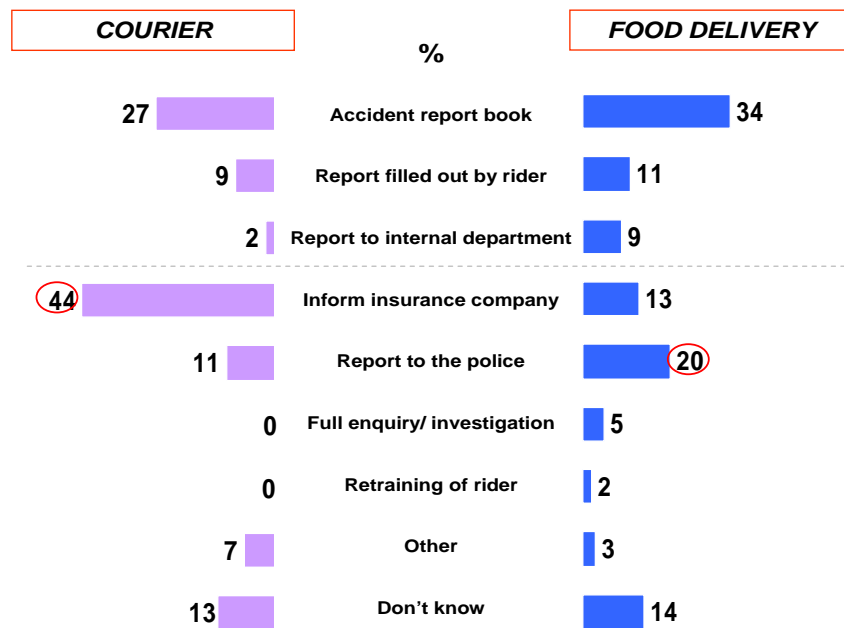
Amongst our limited sample of companies who deploy cycle riders for delivery purposes (42 companies), 29% are aware of the London Cycle Guides produced by TfL and 19% are aware of the National Standards Cycle Training available from Local Authorities (both of these are prompted awareness figures).

5.12 Recording incidents

Presently, there does not seem to be any industry-wide consistency regarding how rider incidents are reported internally (for the purposes of this research ‘incident’ encompasses both ‘damage-only’ and also collisions resulting in injuries either to the rider themselves or anyone else). Companies seem to adopt an ‘ad-hoc’ approach with only one quarter of courier companies and one third of food delivery companies using an accident book to record details of incidents (although there are separate mentions of a ‘report’ being filed by the rider). The data suggests that this is an area that TfL & partners such as the Police and Despatch Association may be able to take the lead, in order to influence or propose standardised guidelines on what is expected from companies in these situations.

How are rider incidents reported and dealt with?

- Percentage of companies who report and deal with incidents in the listed ways



Source: Q28a What systems or procedures do you have in place to deal with and report incidents that happen to riders?
 Base: Courier (55) Food delivery (100)
 UNPROMPTED/ MULTICODE

5.13 Number of incidents and collisions delivery riders are involved in

We asked respondents how many incidents and collisions riders deployed by their company were involved in during the last 12 months. The table below classifies the data from three types of incident; damage only, collisions which caused injury to the rider and collisions which caused injury to someone else. The figures shown are percentages; for example 31% of courier companies have had no damage only incidents and 9% of courier companies have had two collisions resulting in injuries to riders in the last 12 months.

How many incidents and collisions have riders had in last 12 months?

Base: All Don't know not shown	COURIERS %			FOOD DELIVERY %		
	Damage only incidents	Collisions resulting in injuries to riders	Collisions involving injuries to someone else	Damage only incidents	Collisions resulting in injuries to riders	Collisions involving injuries to someone else
None	31	49	78	57	73	96
1	13	16	2	17	18	1
2	9	9	0	14	3	0
3	11	2	0	2	2	1
4	2	4	0	3	0	0
5-10	8	0	0	4	2	1
10+	4	4	2	2	1	0
MEAN	5	1	2	2	1	1

As might be expected, damage only incidents were the most common with 47% of courier companies and 32% of food delivery companies experiencing at least one incident in the last 12 months. 12% of courier companies experienced at least five damage only incidents in the last 12 months, but this is not surprising given the huge number of miles and driving hours the larger courier companies complete every year.

35% of courier companies had riders who had been injured through collisions in the last 12 months and this compares to 25% of food delivery companies, with the mean number of this type of collision amongst both courier and food delivery companies being just one collision.

Collisions involving injuries to someone else were very rare, with riders from 4% of courier companies being involved in this type of collision and 3% from food delivery companies in the last 12 months.

Of the nineteen courier companies who stated to having at least one rider injured through a collision in the last 12 months, twelve companies had riders who were slightly injured and nine companies had at least one rider that was seriously injured (classified as requiring a hospital stay). A single courier company experienced a rider fatality in the last 12 months. The incidence of serious injuries amongst food delivery riders is much lower, the majority of journeys are generally much more localised and at quieter times and the lower power machines used means that speeds that riders are traveling at are less.

It is important to note that although this data gives an idea to the extent and frequency of incidents on London roads, we have to assume that there are many more incidents that take place each year which go unreported by both the riders themselves and the companies.

We also asked respondents a number of other questions relating to incidents and collisions. The table below shows the number of rider days lost as a result of accidents and also the number of days spent for each incident or collision on administration, for example, arranging insurance and repairs.

Number of rider days lost through collision and number of days spent on administration for each incident?

<i>Base: All companies who have had a collision</i>	RIDER DAYS LOST AS RESULT OF ACCIDENTS		DAYS SPENT FOR EACH COLLISION FOR ARRANGING INSURANCE AND REPAIRS	
	Couriers %	Food delivery %	Couriers %	Food delivery %
<i>Don't Knows not shown</i>				
None	20	54	27	34
1	7	8	7	10
2	7	10	7	10
3	7	4	7	0
4	3	2	0	0
5-10	12	10	13	12
10+	27	8	6	8
MEAN	37	3	5	4

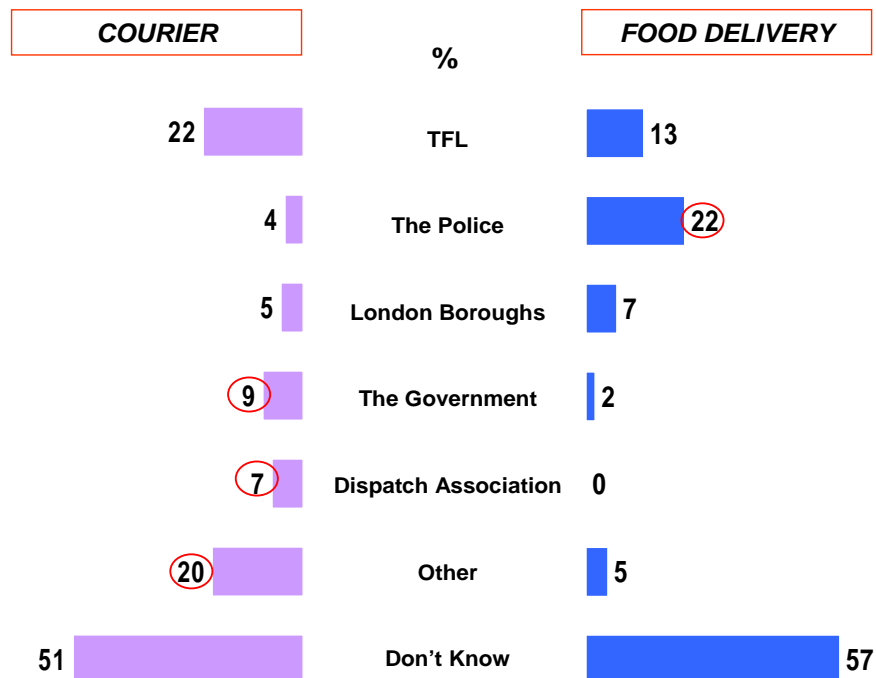
6. THE ROLE OF TFL AND PARTNERS IN ROAD SAFETY ISSUES

Respondents were asked, without prompting, which organisations should work together with businesses within their industries to improve the safety of delivery riders. As you can see from the chart below, the most common organisation mentioned amongst courier companies was TfL at 22%. This was significantly higher than for food delivery companies who in general felt that the Police would be a more likely organisation to work with.

Given the high levels of respondents who were not able to give an answer, it is clear that courier companies and food delivery companies are not, in the main, aware of, or associate with, any organisations that are available to assist them. The findings indicate that TfL and partner organisations may need to be more active in communicating to these businesses that they are responsible for looking out for the interests of delivery riders and as a result assisting their business as a whole.

Who should work with businesses to improve the safety of riders?

- Percentage of companies who think the listed organisation should work with businesses to improve safety of riders



Source: Q33 What, if any, organisations do you think should work with companies like yours to help improve the safety of riders?
 Base: Courier (55) Food delivery (100)
 UNPROMPTED/ MULTICODE

7. SUGGESTED IMPROVEMENTS TO ROAD SAFETY

7.1 What can be done to improve road safety for riders?

Interviewees were asked for their opinions on what they think could be done to improve the safety of P2W and cycle riders in the capital. The responses given were unprompted and covered a wide range of issues. The most common responses, particularly for courier companies, centred around educating and informing other road users to raise levels of awareness and increase understanding of motorcycle riders;

- Running advertising campaigns targeted at other road users
- Introducing training schemes for other road users, to again raise levels of awareness and increase understanding of motorcycle riders

Other issues that received relatively high mentions (between 5% and 12%) were;

- Advanced training for courier and delivery riders
- More cycle facilities – cycle lanes, cycle priority streets, advanced stop boxes
- Allow P2W users into bus lanes (1 in 4 courier companies mentioned this)
- Improved road maintenance
- Advertising and communication campaigns aimed at both riders and other motorists to publicise and highlight the types of collisions that occur
- More enforcement of traffic regulations (especially amongst food delivery companies)
- Training for HGV and bus drivers on P2W and cycle awareness

7.2 How do companies evaluate possible road safety measures?

Our respondents were then prompted to express their opinion on a number of possible measures to improve rider safety. Respondents were introduced to each measure in turn and asked to rate each one using a five point scale where 1= *Not a good idea at all* and 5= *An excellent idea*. The chart below shows the scores given by the respondents from courier companies. The darker bars to the right show the percentage of positive responses and those to the left indicate negative responses.

Improving road maintenance is considered to be the most appealing action to improve the safety of riders in London by delivery companies. 83% of respondents felt this was a positive idea with just under 70% considering it an excellent idea. Consistent with the previous unprompted question, any schemes that target other road users are also considered to be very positive - both advertising campaigns communicating directly at them and training schemes for other road users to educate them on the dangers that courier riders face.

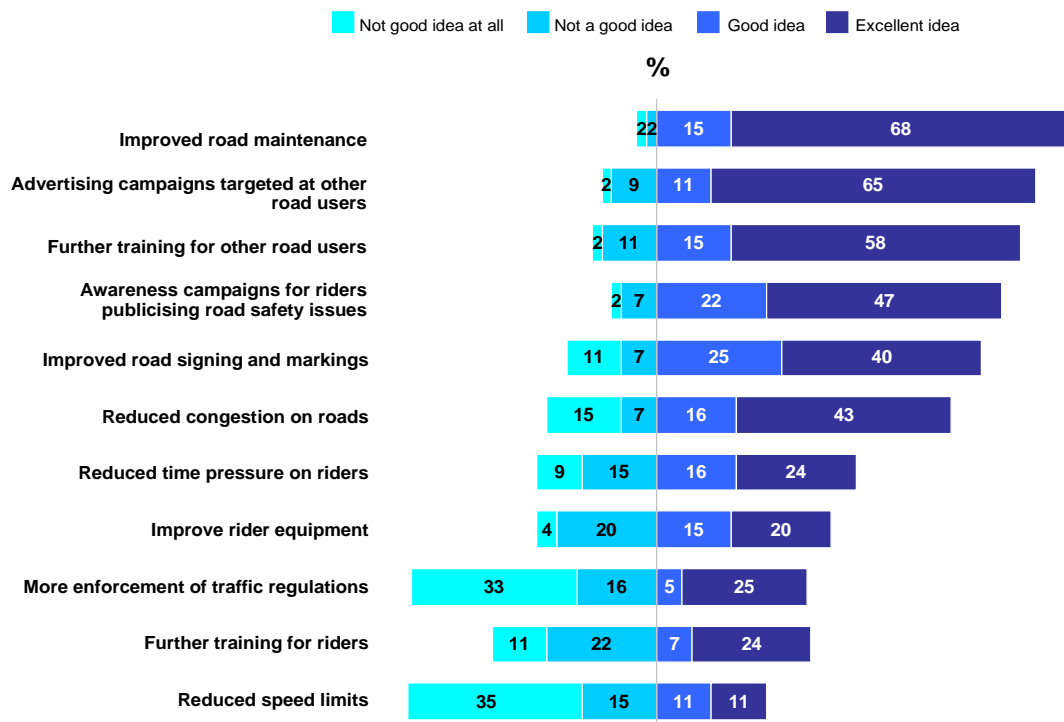
A TV campaign targeting P2W riders sponsored by TfL and the Despatch Association - *"The Day I went to Work"* - is currently being aired and our data suggests that this type of advertising is welcomed by courier companies. Advertising campaigns targeted directly at riders are regarded highly, with just under half rating this as an excellent idea.

Reducing congestion and improving road marking and signage are also rated positively by over half of respondents. Interestingly, reducing time pressure on riders is considered positively by less than half of the respondents we interviewed.

There is a relatively high level of opposition to two of the ideas that we asked about - more enforcement of traffic regulations and reduced speed limits. This is not particularly surprising given that introducing either could have a negative financial impact on businesses; more enforcement of traffic regulations could lead to an increase in fines for riders which would be passed on to the employer and a reduction in speed limits could mean an increase in the time taken to make deliveries, thereby impacting on efficiency of service and profitability.

Rating of ideas to improve rider safety amongst courier companies

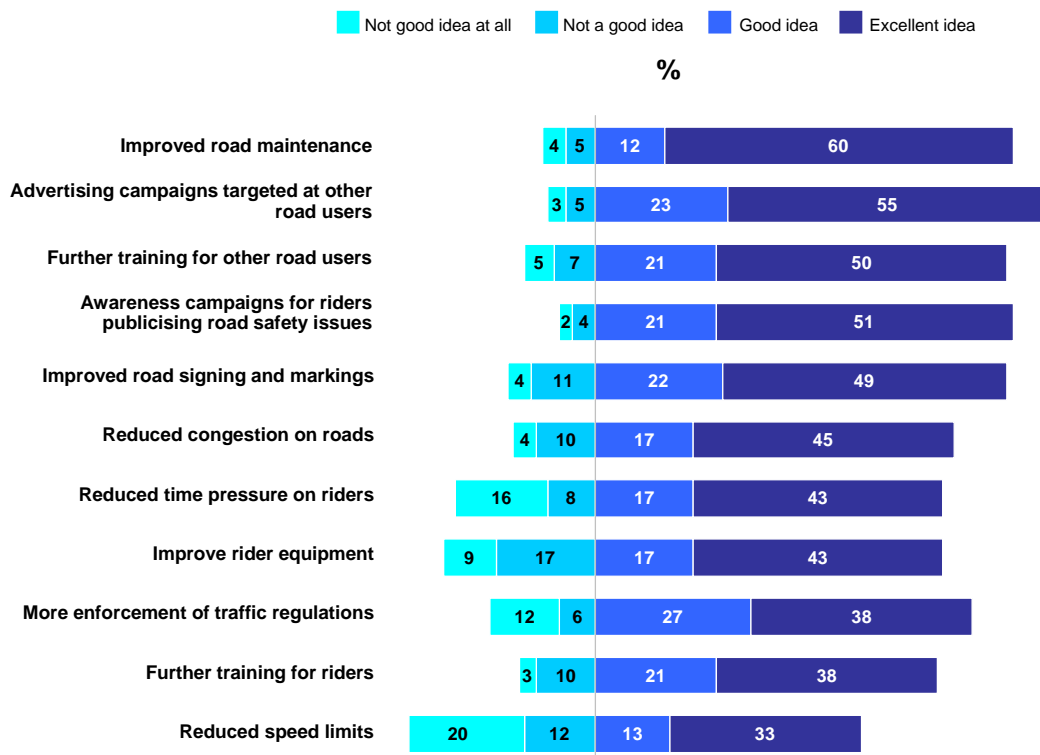
- Percentage of courier companies who think the listed potential improvements are good idea/ bad idea



Source: Q34 How much of a good idea do you think it will be to...?
 Base: Courier (55)
 SINGLECODE FOR EACH STATEMENT

In general, there is a similar trend exhibited amongst food delivery companies as we have seen for courier companies in terms of what are considered the most positive ideas and what are not so well received. However despite this relative uniformity, some significant differences do emerge. There is certainly more support and less opposition amongst food delivery companies on the issues of reducing time pressures on riders, having further training for riders, which is linked to the fact that generally food delivery riders are younger and far more inexperienced, more enforcement of traffic regulations and reduced speed limits. Our data suggests that the food delivery industry is less time-conscious than courier companies and, this is very much driven by how the industry operates. The revenue stream for courier companies is the delivery itself and thus they need to complete as many deliveries as they can in the shortest time possible, whilst for food delivery companies the actual delivering is a secondary service to the provision of food itself.

Rating of ideas to improve rider safety amongst food delivery companies
 - Percentage of food delivery companies who think the listed potential improvements are good idea/ bad idea



Source: Q34 How much of a good idea do you think it will be to...?
 Base: Food delivery companies (100)
 SINGLECODE FOR EACH STATEMENT

7.3 What can delivery companies and TfL do to improve road safety?

Finally, to wrap up the interview, respondents were asked to cite **one** thing that TfL could to improve the road safety of delivery riders and also one thing that their own company and businesses within their industry could do to achieve the same goal.

The responses we received regarding TfL were very consistent with the answers we received elsewhere in the interview;

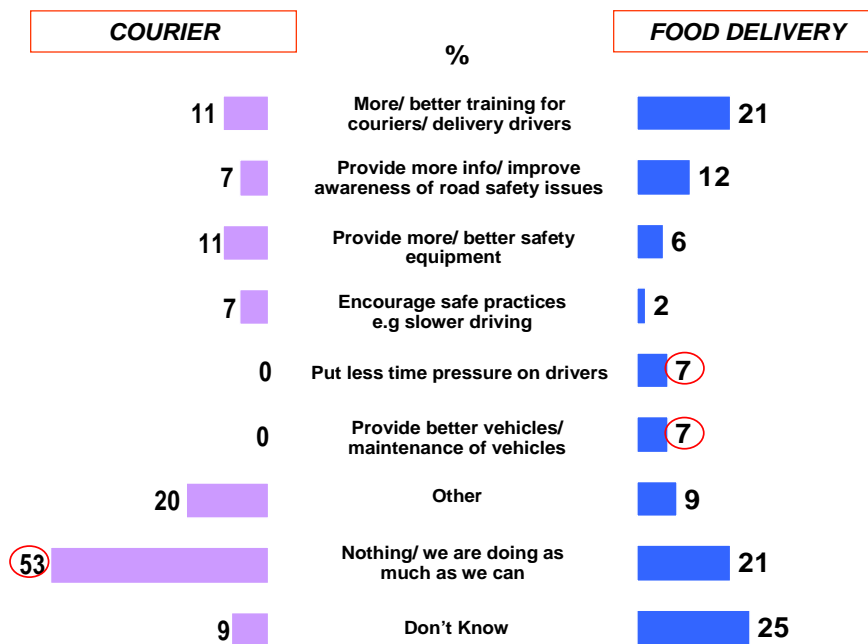
- Improve awareness of other road users through advertising and publicity
- Improve road conditions
- Introduce more lanes for cyclists
- Run more training course for couriers and delivery riders
- Allow P2W riders to use bus lanes
- More enforcement of regulations

Other isolated mentions we received included; better signage and road markings, abolish bendy buses, less parking restrictions and reduction of speed limits.

Respondents were then asked to make suggestions as to measures they themselves could implement to improve road safety for their riders. More than half of courier companies felt that they already did as much as they could to improve the road safety of their drivers compared to just a fifth of those involved in food delivery. Again, this is likely to be due to the high incidence of freelance riders deployed by courier companies which leads to an expectation that the courier riders they deploy are going to be fully trained and experienced and as a result an ‘it’s not our responsibility’ attitude. The research suggests that greater publicity of the issues is required to encourage courier companies to be more active in targeting rider safety.

What can companies do to improve the safety of their own riders?

- Percentage of companies who mention the listed ideas



Source: Q36 What one thing do you think your company could do to improve the road safety of your couriers/ delivery riders
 Base: Couriers (55) Food delivery companies (100)
 OPEN QUESTION/ SINGLECODE

8. CONCLUSIONS

INDUSTRY PROFILE & STRUCTURE

- Courier riders tend to be older and more experienced, whilst those involved in food delivery are more likely to be younger, inexperienced and work part time.
- The main channels for recruitment for courier companies are word of mouth or in local or specialist press. For food delivery, shop window advertising is used by over half of companies.
- Almost half of riders deployed by courier companies, stay with the same company for over two years. This differs from food delivery companies where two thirds of riders leave within a year.
- The number of deliveries made on average each day by food delivery companies is under 50, compared to couriers where the figure is over 100.
- Courier riders cover a distance of 121 miles per day, contrasting to just 23 for food delivery riders.
- Peak delivery times for courier companies are between 10am and midday, and again between 2pm and 6pm. For food delivery companies the busiest time is between 6pm and 10pm.
- Food delivery staff are mostly paid a fixed salary compared to courier riders where the majority are commission based, either by the number of deliveries or by mileage.
- The majority of riders deployed by courier companies are freelance who ride and own their own vehicles, whereas within the food delivery industry contracted riders who ride vehicles supplied by their employee form the mainstay of the workforce.

AWARENESS AND UNDERSTANDING OF HEALTH AND SAFETY LEGISLATION AND LEGAL REQUIREMENTS IN RELATION TO ROAD SAFETY

- Around a third of courier companies and two thirds of food delivery companies deploy riders who only hold provisional licences. This contravenes the Courier Code, which stipulates that all riders working within the industry should hold full licences. There is also a great deal of inconsistency in the checking of licences, with many companies (around 10% for both sectors) making no checks at all.

- Only 30% of courier companies insist that their riders must have a clean driving licence.
- When it comes to training and previous experience, the Courier Code states that all riders should have previous riding or despatch experience before starting work and that they should be properly trained. It was found that 40% of courier companies and 30% of food delivery companies required no previous experience whatsoever from at least some of their riders, and that only half of food delivery companies and a fifth of courier companies had training schemes of any kind.
- The Courier Code requires that all vehicles be roadworthy and that regular inspections be carried out. It was found that a fifth of courier companies never perform such inspections, though this is most likely due to the vehicles being owned by the individual rider. In addition, the qualifications of many staff members in companies where inspections are carried out are often non-existent. Over a third of courier companies, and a fifth of food delivery companies allow inspections to be performed by staff without any formal qualifications or experience. On a more positive note, nearly all companies who deploy riders that own their own vehicles request verification of a valid M.O.T certificate (courier 92%, food delivery 82%).
- Time limits on deliveries are imposed by around half of all courier companies. This goes against the guidelines of the Courier Code that requires 'realistic delivery schedules'. None of the food delivery companies we interviewed implement any such limits probably due to the localised nature of their business. The main penalties received by riders for late delivery are financial with pay deductions or losing certain clients or jobs accounting for nearly a third of punishments. These measures would appear to put pressure on some riders to meet targets and as a result possibly break the law and risk injury in the process.
- Awareness of Government Health and Safety legislation is low, with 89% of courier companies and 70% of food delivery companies being unaware of any at all. Initial spontaneous awareness of the Courier Code was particularly low at just 2%, and despite over half of courier companies stating awareness of the code once prompted, nearly half stated it meant nothing or very little to them. For food delivery this was much worse with only 9% being aware and of these eleven food delivery companies aware, eight did not know anything about it.

UNDERSTANDING WHAT ROAD SAFETY PRACTICES ARE CURRENTLY IN PLACE

- The courier code recommends that in order to promote better riding, incentives such as free training courses or extra money should be offered by companies. There is low penetration of these types of reward schemes across the industry with only 10% of courier companies and 20% of food delivery companies claiming to offer such incentives to riders.
- There is a significantly higher proportion of food delivery companies who state they offer both formal training schemes and guidance to their riders than their counterparts within the courier industry. Over half of food delivery companies answered that they offer formal training schemes compared to only 21% of courier companies.
- Presently, there does not seem to be any industry-wide consistency regarding how rider incidents are reported internally. Companies seem to adopt an 'ad-hoc' approach with only one quarter of courier companies and one third of food delivery companies using an accident book to record details of incidents