

# Rides and responsibilities

Understanding the needs and preferences  
of those who work in the gig economy

Aveek Bhattacharya  
Jake Shepherd

**SMF**

**Social Market  
Foundation**

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Kindly supported by



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## FOREWORD

By James Kirkup, SMF Director

The Social Market Foundation is a think-tank with charitable status. Deliveroo is a commercial company whose sponsorship and co-operation has made this report possible, not least by giving the SMF the opportunity to independently survey and explore the views and opinions of thousands of its current riders. By doing so, the company has allowed us to deliver on our commitment to inform and improve public debate about politics, economics, and policy.

The headline findings of this report are broadly positive. Deliveroo riders are as happy as other members of the workforce. They choose Deliveroo in preference to other work, in part because they prize flexibility more highly than people in other sectors. They are motivated by money, just like the rest of the workforce. Many see it as their primary source of income, and see it as a long-term option. By a wide margin, they favour their current legal status as self-employed, recognising the trade-offs it entails.

The gig economy is contentious territory, full of heated debate and strong opinions. I don't doubt that some people who take part in those debates will dismiss this report because of Deliveroo's sponsorship. That would be mistaken. The SMF retained full editorial control over this report, as we do in all our work. As a condition of this project, Deliveroo signed a legal contract reiterating that independence and guaranteeing that whatever the results of our work, we would publish them in the same way. This is the SMF's report, not Deliveroo's.

Far too much of public debate is today reduced to simple choices: are you for something or against it? Whose side are you on? The SMF does not take sides. Our aim is to offer the evidence that, when properly considered, makes such simple framing untenable. It is something of a cliché that the role of think-tanks is to tell other people that "actually, it's more complicated than that." But that cliché is rooted in truth: most things are too complicated to be reduced to stark binaries.

We are neither in favour of nor opposed to the gig economy. We want it to be discussed and analysed on the basis of evidence, not agendas.

Working with Deliveroo gave us access to people and thus evidence that would not otherwise be available to us, the public and their representatives. This report is based on a survey of more than 7,000 people actively using the Deliveroo app, as well as surveys of former Deliveroo riders, other people working in the gig economy, and a nationally representative sample of the general UK population. Some of those people also took part in focus group sessions. In all, we've been able to ask questions of more than 9,000 people, research that generates a lot of evidence.

That evidence allows us to meet our charitable objective, educating the public on the reality of this market. The reality revealed in this report is not simple, and it certainly does not support some of the prominent narratives presented about the gig economy and the people in it.

A lot of political and media commentary about gig work proceeds from the (often unstated) presumption that gig workers do the work they do as a last resort, that they

have no other options and little choice. The evidence we present here challenges such simplistic and potentially patronising narratives. This report shows that Deliveroo riders, and gig workers in general, are at least as happy in their work as other workers. More important still, it shows that they are largely aware of the trade-offs and consequences that flow from working in the gig economy – and they choose to do that work on the basis of that knowledge. They are not victims. They are economic actors making informed choices about how and where to use their time.

Yet some public discourse does not acknowledge or respect them as such. If you consider gig work to be a last resort rather than an informed choice, you risk appearing contemptuous of that work and the people who do it. Readers should pay careful attention to this report's findings on riders' views of their work and its status: they report pride, not shame. Those who say they want to improve the condition of gig workers might reflect on that. A more respectful public debate about gig work is surely due, one that treats those who do that work as adults and pays more attention to the choices they make and what they say about those choices.

Here, a word is due about Deliveroo and its choices. It operates in a sensitive political climate: politicians and media commentators (I am sometimes counted in the second group) often express strong views about the company and the wider gig economy. As such, any new evidence published about Deliveroo and its riders is liable to be read by people hoping to use it to advance their own pre-existing arguments about the company and gig work. In other words, Deliveroo is taking a risk by helping to put this new evidence into the public domain. That is to the company's credit. Deliveroo was under no obligation to support this independent investigation of its riders and their views. Yet it has done just that, meaning the evidence here is now available to the public and their representatives.

As this paper notes, the SMF has consistently argued that companies of all sorts should meet not just their legal but their social obligations, acting with full regard to the interests of stakeholders of all sorts, including but not limited to shareholders. Upholding the social contract between business and wider society is good for business, since it renews and reinforces its social licence. Deliveroo's willingness to make available new evidence about its riders is a good example of showing that regard to the interests of stakeholders; others should follow it.

With regard to that potential reputational risk arising from this report, I should address a few words to those who come to this report with an agenda. Anyone hoping that the findings here will support preconceived criticisms of Deliveroo and gig working should be disappointed. The picture that emerges from this research is that Deliveroo riders are largely content with their work and status – or at least, as content as other workers elsewhere in the economy. Some of them would like to be paid more for their work, but this should not surprise, since it is true of most people: I'm happy with my work, but I'd still like to be paid more for it, and I suspect the same is true of many of those who read this report.

There is a natural tendency for think-tanks and other researchers to seek out the novel and the different: finding exceptions and departures from the norm is frankly more exciting than discovering conformity. I have written here about narratives – “narrative”

is just a grand way to talk about stories, and stories are the basis of all communication and so of all politics. Finding that gig workers are quite similar to other workers in the complexity of their economic experience simply isn't as good a story as identifying divergence. But that is the evidence, and evidence should always be more important than stories.

## EXECUTIVE SUMMARY

### Key findings: 7 things policymakers should know

- **Riders are as happy as other members of the workforce.** Three-quarters of current Deliveroo riders say they are satisfied with their work, broadly in line with the rest of the economy.
- **Riders choose Deliveroo in preference to other work.** The majority came from employment, with only one in five unemployed, on furlough or looking for work before starting on the platform. Most believe they could have found other forms of work if they wanted.
- **Riders prize flexibility more highly than those in other sectors.** 40% of current riders put the ability to choose their hours in their top five criteria for choosing work, compared to 20% of the general workforce
- **Riders are motivated by money, just like the rest of the workforce.** Most riders say they are satisfied with their earnings, and 57% believe that they earn more riding with Deliveroo than they could do in comparable work. 23% of riders say they are dissatisfied with their earnings, the same proportion as in the general workforce.
- **Riders favour their current legal status, recognising the trade-offs it entails.** Most riders would be unwilling to sacrifice flexibility or earnings for more generous benefits. The vast majority (91%) do not want to become employees, though most would like to combine self-employment status with more benefits.
- **Riders can see Deliveroo as a primary source of income.** While 60% of riders have other forms of work, nearly a quarter say over 70% of their income comes from riding with Deliveroo
- **Riders see Deliveroo work as a long-term option.** One in three current riders say they intend to still be riding with Deliveroo in five years' time: one in five in a decade.

### The gig economy debate

- The gig economy – task or project-based work sourced through platforms or apps – is one of the most debated recent labour market developments. Its proponents see it as a new and valuable source of work and income offering unrivalled flexibility, while its opponents portray it as unfair and exploitative.
- In many countries, the policy debate has centred on the question of whether those working in the gig economy should be treated more like employees, gaining entitlements like paid holiday, sick pay, parental leave, and occupational pensions, but potentially losing the autonomy to set their own hours and working patterns.
- Deliveroo, one of the most prominent gig economy platforms in the UK, invited us to speak to their fleet of riders to shed some light on this debate, adding the perspective of those at its heart: those working the gig economy themselves.

As with all our work, the SMF retained editorial independence. This report is the work of the SMF alone.

## **New research into the needs and experiences of those working in the gig economy**

- We combined quantitative and qualitative research to build a picture of the needs and experiences of those doing gig work, and how they compare to those with more traditional jobs.
- We surveyed over 9,000 people – 7,000 current Deliveroo riders, but also former riders and workers elsewhere in the gig economy and general workforce.
- We also conducted eight focus groups – seven with current Deliveroo riders, one with people that had left the platform.
- Deliveroo shared some aggregated internal data on rider demographics, hours, and earnings to inform our understanding. We are not able to publish this data itself as it is commercially sensitive. Deliveroo, the owner of that data, believe that publication would disclose information to rival companies that could give them a competitive advantage over Deliveroo, a judgement we are not qualified to comment on. While we believe full publication of evidence is always preferable, we are confident that we have amassed enough evidence in this project to make our analysis and conclusions robust, regardless of whether one of our datasets is published.
- Before our fieldwork began, the research methods devised for the project were independently reviewed by a panel of SMF trustees and advisors: Professor Wendy Thomson CBE of the University of London; Professor Tim Bale of the Queen Mary University; and Giles Wilkes of the Institute for Government.

## **Who rides for Deliveroo and other gig economy platforms?**

- While the gig economy is often associated with those on the fringes of the labour market, especially students and young people, a significant and possibly growing minority do not fit that picture:
  - 57% of Deliveroo riders and 43% of people working in the gig economy are under 35; though not perfectly comparable, surveys conducted in 2018 suggested those figures were 73% and 56%.
  - The mix of riders also appears to have shifted away from those in full time education, who account for 13% of riders today, having been 21% in the 2018 survey.
  - Almost half of Deliveroo riders live with a child and 9% are carers.

## **What do Deliveroo riders and other people working in the gig economy want from their work?**

- Deliveroo riders are split quite evenly in their level of commitment to the work: around half see it as a ‘side job’ or stepping-stone, but two-fifths consider it their main work and expect it to be so for the foreseeable future.
- One in three current riders intend to still be riding with Deliveroo in five years’ time; one in five in a decade.

- Deliveroo riders expect to be working on the app longer than the average worker expects to remain in their job: 34% Deliveroo riders anticipate doing the same thing in five years' time compared to 25% across the whole workforce.
- Most Deliveroo riders have other sources of income, but a substantial minority are economically dependent on their work on the platform:
  - 50% of Deliveroo riders are the primary earner in their household
  - Though 60% have other sources of work, 40% work exclusively with Deliveroo.
  - 19% are both primary household earners *and* rely solely on the app for money.
  - The median rider says that half of their income comes from Deliveroo, and around a quarter (24%) report over 70% of their income from work on the platform
- The majority of Deliveroo riders actively choose work in the gig economy, recognising the trade-offs it entails, rather than being forced into it by a lack of alternatives:
  - The majority came from employment. Only one in five riders were unemployed, on furlough or looking for work before starting on the platform.
  - Most riders believe they could have found other forms of work (including traditional jobs) if they wanted – only 12% did not think they could have found work without Deliveroo.
  - Riders seem to have a clear preference for gig work over employment: 52% say they would start their own business or seek work elsewhere in the gig economy if they could no longer work with Deliveroo.
- Deliveroo riders, like workers elsewhere in the economy, select their work primarily on the basis of pay:
  - Two-fifths put pay in their top three reasons for choosing their work
  - 57% say that they believe they earn more riding with Deliveroo than they would in a traditional job.
- However, the greatest difference between Deliveroo riders and workers in other sectors is their prioritisation of autonomy and independence:
  - 40% of current riders put the ability to choose their hours in their top five work criteria, compared to 20% of the general workforce
  - 30% said they value being able to pick their place of work, compared to 21% of the general workforce
  - This is consistent with other people in the gig economy, 27% of whom prioritised the ability to choose their hours, and 29% place of work.

### **How satisfied are Deliveroo riders and other people doing gig work with their work?**

- Work satisfaction among Deliveroo riders, and workers in the gig economy more generally, is very high: three-quarters of current riders say they are satisfied with their work. This is broadly in line with the rest of the economy.

- The majority of riders are satisfied on a range of dimensions of work quality, and in most cases satisfaction is higher for Deliveroo riders and others doing gig workers than the rest of the workforce.
- 93% of current riders say they are satisfied with the flexibility of working on the app, and over 80% with the amount of control and scope for using their initiative.
- Most riders say they are satisfied with their earnings, and 57% believe that they earn more riding with Deliveroo than they could do in other similarly skilled work.
- It is the case that 23% of riders say they are dissatisfied with their earnings, but this is exactly the same proportion as in the general workforce.
  - Concerns over earnings often relate to relatively specific structural issues, such as compensation for long waits for collection and uncertainty over how rates fluctuate, rather than a widespread feeling that riders are underpaid.
  - Some did voice worries that they can sometimes earn less than the minimum wage, currently £8.91 per hour for those over 22. Deliveroo insist that their riders are always paid more than the minimum wage for *time spent on delivery*, and indeed their internal data shows that average earnings for time spent on deliveries is well above the minimum wage. However, if riders include time spent on the app, this may reduce their perceived hourly earnings.
- 59% of current riders are satisfied with the benefits and protection they receive, and occupational benefits are fairly low down the list of priorities for riders in choosing their work.
- Though only 16% of riders say they are dissatisfied with the status quo, that does not necessarily mean riders would not appreciate more benefits if they were available: 85% say sick pay and paid holiday are important, 79% say the same of their pension and 73% of parental leave.
- However, providing such benefits would have legal and financial implications for platforms – it could compromise riders’ ability to remain self-employed or lead to a reduction in earnings.
- The vast majority of riders would be unwilling to sacrifice flexibility or earnings for more generous benefits
  - The vast majority (91%) would like to remain self-employed, though most would like to combine self-employment status with more benefits.
- While 71% of riders say they are proud to ride for Deliveroo, some riders also describe feeling disposable, neglected and disrespected – by Deliveroo, but also by restaurants and the general public.
- 62% of riders – in line with the rest of the economy – say they are satisfied with their ability to develop their skills in their work. Yet despite a range of resources to help riders develop their prospects, a significant minority feel the platform could do more to support them. In many cases, this could be due to lack of awareness over what is on offer.
- In a broader sense, some riders expressed fear and uncertainty about the future and an unwillingness to look too far ahead.

## Conclusions and implications

- Most Deliveroo riders consider riding with Deliveroo to be good work, and choose it deliberately because they value its autonomy and flexibility. They are as happy with their work as people in conventional employment. They make an informed choice to ride with Deliveroo in preference to other activities, often because they value the flexibility this offers more highly than they prize the characteristics of conventional employment.
- Debate among policymakers and politicians about this labour market should recognise riders and other gig workers as rational actors who are actively making an economic choice around how, when, and where to work. They are economic actors like other workers. No doubt policy can ensure better outcomes in this market, as it can for almost all other markets. But any discussion of that policy should proceed from the acceptance that riders and gig workers are economic actors, not victims.
- As a result, any attempt to regulate the market should proceed cautiously, recognising the premium that Deliveroo riders place on flexibility and their clear desire not to be employees – and as such, that they have a lot to lose.
- Given the relatively high levels of satisfaction with earnings among riders and the belief most of them have that they earn more on the platform than they would elsewhere, we believe the fundamental issue here for companies and policymakers is one of trust and transparency
  - Deliveroo and other platforms could build trust among those working on them, policymakers, and the public by sharing data with a regulator to demonstrate that average workers consistently clear the national minimum wage.
- More broadly, while we have found that riding with Deliveroo seems to work well for most riders in most respects, we see two major potential challenges on the horizon:
  - Ensuring platforms and policymakers recognise their obligations to the significant and growing minority that rely heavily on gig work for their incomes, and expect to continue to do so for years to come.
  - Addressing the possibility of short-termism among those doing gig work who may be making inadequate investment and planning for their future.
- The growing divergence of models across platforms, allowing people to ‘vote with their feet’ between greater flexibility or security, is encouraging.
- However, all platforms should continue to recognise their social responsibilities – obligations that go beyond legal requirements – to those that have shown them significant commitment
  - Deliveroo has for some time insured riders against injuries on the job, and it is encouraging that it has recently extended this to cover illness and parenthood.
  - Insofar as legal obstacles prevent platforms from offering benefits that their riders want without jeopardising their self-employed status, such laws and regulations should be reviewed.

- At the same time, it is important to do more to make those doing gig work feel respected, valued, and included. Platforms could offer more forums for engagement and show commitment and investment by expanding and better publicising career and financial planning support.
- There should also be a wider societal discussion about the way people in the gig economy are perceived, discussed, and sometimes treated.
- Finally, there is a critical role for the government to protect those in the gig economy – in particular, those vulnerable to sickness and injury, as well as helping them to make provision for old age.

## CHAPTER ONE – INTRODUCTION

### The rise of the gig economy

The rise of the “gig economy” is one of the most dramatic and contentious changes in the labour market in recent years. The term is used rather loosely to cover a range of working arrangements: flexible work, self-employment, zero hours contracts. The definition preferred by the Department of Business, Energy and Industrial Strategy (BEIS) is as follows: the gig economy involves “*exchange of labour for money between individuals or companies via digital platforms that actively facilitate matching between providers and customers, on a short-term and payment by task basis*”.<sup>i</sup>

This definition draws our attention to two central features of gig economy work. One is that it involves individual (usually short-lived) tasks or projects i.e. ‘gigs’. The second is that these activities are sourced online through the apps and websites that have become synonymous with the gig economy – Uber, Just Eat, UpWork, TaskRabbit. High on that list of names is Deliveroo, the meal delivery platform which connects restaurants, takeaways and grocers to delivery riders that transport their food to home consumers. When Deliveroo invited us to speak to their riders in order to develop a picture of their background, needs, experiences and preferences, we saw it as an exceptional opportunity to better understand this fast-growing and much-discussed sector.

According to the BEIS definition, in the year 2017, 4.4% of British adults had done some work in the gig economy, some 2.8 million people.<sup>ii</sup> The number has almost certainly risen since then. A pair of surveys carried out by researchers at the University of Hertfordshire found that the proportion of adults working weekly in the gig economy doubled between 2016 and 2019, from 4.7% to 9.6%. By 2019, 15.3% of people said they had ever done gig work – equivalent to around 7.5 million people.<sup>iii</sup> The survey we conducted for this project suggests the gig economy may have grown further in the course of the pandemic. We find that just under a third of people in employment – 9 million in total – have done some form of gig work in the last year.

### Gig economy: politics, policy, and law

Proponents of gig work see it as a demonstration of the strengths of the modern economy – the creation of new work opportunities through the combination of flexible labour markets and new technology that efficiently matches demand and supply. Opponents see it as a symptom of economic failure: the exploitation of desperate workers stripped of labour rights and protections.

That fundamental debate – whether the gig economy is good or bad for workers – has led to political controversy and legal dispute. At its heart is the question of how far those doing gig work should be treated like employees of the platforms they work on, as opposed to self-employed independent contractors. In large part, the difficulty stems from the fact that gig work does not fit neatly into pre-existing conceptions of self-employment or employment. Moreover, it is complicated by the fact that different platforms have quite different business models, which have changed and continue to evolve over time.

The relationship between platforms and the people that work on them can differ from standard employment in several ways. Some platforms are pure intermediaries that do not contract with those doing the work, whereas Deliveroo does contract with its riders. Many platforms do not 'hire' in the way that employers typically do, and they vary in the extent to which they restrict access to their apps and websites. For example, Deliveroo does not have a formal recruitment process, but only processes applications for onboarding – for example, checking right to work and criminal records. Many platforms – Deliveroo among them – do not monitor performance in the way that employers typically do. Platforms vary in the level of influence they have over pay: some allow users to set their own rates, Deliveroo offers a fee per delivery accepted and completed. Perhaps most crucially, people working on platforms tend to have more flexibility over when, where, and how they work than employees tend to. While some offer shift-style working patterns, Deliveroo riders have no constraints on the time or location they log on to the app, and have full discretion to accept or reject deliveries.

In practice, much debate centres on whether those in the gig economy should be entitled to the rights and protections that come with employment or worker status from the platforms they work on: minimum wage, holiday pay, sick pay, parental leave and protections against unfair dismissal among others. Yet for platforms to grant such rights and employ those that work on them would fundamentally alter their business models. In particular, employment would bring the right to earn a minimum hourly wage, but it is economically infeasible for platforms to offer that right without restricting flexibility (for example, introducing shifts) and increasing performance monitoring. Otherwise, the platform model would mean that people could opt to work at times of low demand when there are too few jobs to cover their wages (for example, early in the morning), or refuse to accept jobs while still being paid.

Within UK law, there are three main types of employment status: employee, worker and self-employed/contractor, in descending order by level of rights and protections. All employees are workers, but not all workers are employees. Employees work under 'traditional' ongoing contracts. What distinguishes workers from the self-employed is that a) workers cannot sub-contract, but are personally responsible for doing the work; b) there is a "mutuality of obligation" between the worker and their putative employer and c) the employer exerts control over the worker.<sup>iv</sup>

A high-profile judgement from the Supreme Court in February 2021 confirmed that Uber must treat its drivers as workers, rather than self-employed, entitling them to earn the national minimum wage, be entitled to statutory holiday rest breaks and protection against discrimination and unfair treatment.<sup>v</sup> The decision was based on five key points that reflect the level of control Uber was deemed to exercise over its drivers: i) Uber, rather than the driver, set fares; ii) Uber imposed contracts and terms of service, which drivers could not alter; iii) Uber limited drivers' ability to reject trips by reviewing their acceptance rate and imposing penalties on those that declined too many; iv) Uber monitored its drivers' performance through its passenger rating system; v) Uber limited communications between passenger and rider to prevent them establishing a longer-standing relationship.

However, this judgement relates specifically to Uber's ride-hailing business model, and does not apply to Uber Eats (its food delivery business) or necessarily to other ride-sharing platforms. A separate 2017 ruling, upheld on appeal in June 2021, explicitly considered the status of Deliveroo riders and held that they should be classified as self-employed.<sup>vi</sup> The Deliveroo case differed from the Uber case in that it related to riders' right to union recognition and collective bargaining, whereas the Uber case focused on minimum wage, working time rules, and other employment protections.<sup>vii</sup> However, one of the key differences between the cases is that Deliveroo riders have been held to have a right to substitute for one another in doing deliveries, unlike Uber drivers. Riders can accept deliveries on their own account, appoint somebody else to do the deliveries for them and pay them for that service without any need to notify or gain approval from Deliveroo.<sup>viii</sup> As noted above, personal responsibility for fulfilment of work is a central part of the legal distinction between employment and self-employment, so on this basis Deliveroo riders have been deemed not to be employees of the platform.<sup>ix</sup>

Political intervention in the UK has been limited so far. In 2016, following the initial Uber judgement, the government commissioned the Taylor review of modern working practices.<sup>x</sup> This called for the tripartite distinction between employees, workers, and the self-employed to be maintained, although it recommended that the worker category should be renamed 'dependent contractors'. It also suggested that greater emphasis be placed on the level of control exerted by platforms and less on whether the worker fulfils tasks themselves in determining whether somebody is a dependent contractor. In response to the Taylor review, the May government pledged to bring forward legislation on employment status and in 2018 carried out a consultation on the topic. However, no further consultation or legislation has been published.<sup>xi</sup> The Labour party has called for further action, particularly in light of the 2021 Uber ruling, and has proposed the extension of eligibility for minimum wage, sick pay, holiday pay, paid parental leave, and protection against unfair dismissal to 6.1 million people, including workers in the gig economy, as part of its employment rights charter.<sup>xii</sup>

Other jurisdictions have taken different lines from the UK – and each other – on the rights of those in the gig economy. Courts in Spain<sup>xiii</sup>, Italy<sup>xiv</sup>, the Netherlands<sup>xv</sup>, and France<sup>xvi</sup> have all suggested in different ways that some platforms' obligations be expanded.<sup>xvii</sup> The French Government proposed legislation in 2019 that would allow platforms to develop a 'charter' outlining rights and benefits for those self-employed people that work on them without this necessarily being used as evidence of an employment relationship.<sup>xviii</sup> In September 2021, French President Macron announced several government measures to protect self-employed workers, including increased access to unemployment benefits and a reduction in insurance costs for workplace accidents and illness.<sup>xix</sup> In California, the state assembly passed legislation in 2019 reclassifying people working in the gig economy as employees, which was overruled by a referendum vote the following year – but that ballot measure is currently subject to legal challenge.<sup>xx</sup> The Spanish Government has implemented particularly strong regulation<sup>xxi</sup>, which came into force in August, reclassifying riders for food delivery platforms as employees – despite protests from many riders themselves.<sup>xxii</sup> Soon after, Deliveroo announced its intention to withdraw from Spain. It has not explicitly linked

this decision to the new regulations, though it has been critical of them.<sup>xxiii</sup> Other food delivery companies have taken different approaches. Just Eat has moved a number of its riders onto employment contracts in several countries – around 2,000 in the UK, as of April.<sup>xxiv</sup> While maintaining its self-employment model elsewhere, Uber Eats has shifted its Spanish riders onto fixed-hour contracts via employment agencies.<sup>xxv</sup>

## **The need for better evidence on the experience of working in the gig economy**

In the middle of these frantic debates, the voice of those at their centre – people actually working in the gig economy – can easily be lost. The purpose of this report is to reinsert them into the discussion, moving beyond prejudice, assumptions, and anecdotes to learn more about the people most affected. What is work like? What are their benefits and drawbacks? Why do people take them on? How do they feel about the prospect of greater protections and stricter regulations?

This report seeks to provide direct, robust, and timely evidence on the experiences and preferences of one prominent section of the gig economy: Deliveroo riders. It combines quantitative and qualitative evidence, drawing on four separate surveys, including one completed by 7,000 people currently working on the Deliveroo platform, as well as eight separate focus groups. Importantly, we put these responses in the context of the wider economy, to understand what Deliveroo riders (and those in the wider gig economy) have in common with the typical worker, as well as how they differ.

It is not the first piece of research to canvass people in the gig economy (or even Deliveroo riders) for their opinions. Most prominently, there is the 2018 survey of people doing gig work commissioned by BEIS.<sup>xxvi</sup> That year, Public First also carried out a survey of 2,500 Deliveroo riders, as well as five focus groups, sponsored by the company.<sup>xxvii</sup> Yet in such a fast-moving sector, things can change a lot in three years, especially when that period covers a global pandemic. Therefore, this report builds on those previous projects to offer an up-to-date picture for 2021.

The purpose of this report is not to provide detailed policy prescriptions, but rather to better understand the strengths and weaknesses of the status quo. In any case, recommendations based primarily on analysis of users of one platform (Deliveroo) in one type of gig work (food delivery) would be drawing on too narrow an evidence base. However, we do speculate a little on what the implications of our findings might be, not just for policymakers, but for platforms as well.

The structure of the report is as follows:

- **Chapter two** outlines the research methods used in producing this report.
- **Chapter three** profiles the characteristics of those who ride with Deliveroo.
- **Chapter four** seeks to understand their motivations: what do Deliveroo riders and other people working in the gig economy want from their work?
- **Chapter five** examines the experiences of Deliveroo and people doing gig work, and how satisfied they are with different elements of their work.
- **Chapter six** offers some conclusions and implications for policymakers, platforms (particularly Deliveroo), and the general public.

## CHAPTER TWO – METHODS

### Rationale and research questions

This report tries to answer three questions in order to better understand the preferences and experiences of those that work on the Deliveroo platform, and more generally, those that work in the gig economy:

1. Who rides for Deliveroo/works in the gig economy? What are their backgrounds, life and economic circumstances?
2. What do they want from their work? What are their motivations for working in the gig economy, and how do these fit with their wider life and career plans?
3. How satisfied are they with their work? How does the experience of gig work compare to more traditional employment?

By building a better picture of the needs, expectations, desires, and working lives of Deliveroo riders and other people in the gig economy, we will have a clearer idea of how justified and well-placed concern for their welfare is. This in turn, will help us better understand the sort of changes in policy and practice that would actually help them rather than merely being presumed to do so.

This research focuses on Deliveroo as a sort of case study, as an example of a gig economy platform. This approach has strengths and weaknesses. The gig economy is diverse, and so no one organisation should be imagined to be representative of all of it – our findings may not therefore be generalisable to other platforms and sectors. At the same time, that complexity means that we get a richer understanding from examining one platform with one business model in detail, rather than trying to squash very different types of gig work together. And if we can only look at one platform in depth, there is none better than Deliveroo – a firm near-synonymous with the gig economy in the UK.

Deliveroo approached us earlier this year with an offer to sponsor this research and help us with access to their fleet of riders. We concluded that the project would generate useful evidence for policymakers and the public, consistent with the SMF's charitable objective: educating the public about markets and public policy. In particular, working with Deliveroo allowed us access to an extremely large and representative sample of riders, creating a robust dataset unrivalled elsewhere in the UK gig economy discussion. The company was also willing to share some objective internal data at an aggregate level, to respect privacy and comply with protection rules. As this data is deemed commercially sensitive, we are not able to publish it as part of this report, but it has informed our analysis throughout. While we believe full publication of evidence is always preferable, we are confident that we have amassed enough evidence in this project to make our analysis and conclusions robust, regardless of whether one of our datasets is published.

At the same time, any partnership involving a commercial entity has the potential to raise concerns about bias and conflicts of interest, or the appearance of the same. These issues are common with other sponsored think-tank projects, but may be felt to be particularly acute given Deliveroo's direct interest in the question at stake and how

highly politicised it is. As is always the case, the SMF's editorial independence is guaranteed in a legal contract between the charity and the sponsor: this report is our work and no-one else's. We have also emphasised our independence from Deliveroo at every stage of data collection, reassuring participants that nothing they say as individuals will be reported back to Deliveroo in order to try and avoid desirability bias (i.e. any perceived pressure to say what they think Deliveroo wants to hear).

Given the particular sensitivity of the project, we convened an independent advisory group, working at arm's length with no contact with Deliveroo. This advisory group were shown research protocols and questionnaires to confirm that they did not seem 'leading' or biased. They were also given the opportunity to review research outputs to validate our interpretation of our findings. All have signalled they are confident in the project's methods and outputs. They also reviewed this report before publication and are confident in its content and conclusions.

## Surveys

In this report we draw on four separate surveys:

- *Current riders*: people currently active on the Deliveroo app (7,285 respondents)
- *Former riders*: people that previously worked on the Deliveroo platform, but no longer do so (268 respondents)
- *General workforce*: a representative sample of British residents in employment (1,292 respondents)
- *Wider gig economy*: A representative sample of British residents that report participating in some form of gig work (512 respondents)

Participants in the first two surveys – former and current riders – were recruited through Deliveroo. Participants in the final two – general workforce and wider gig economy – were recruited through Opinium, an independent survey provider. The surveys were in the field in July 2021.

The current rider survey, by far the largest, is the main focus of this report. Invitations to participate were sent to all Deliveroo riders. Participants were given the option to complete the survey in English, Portuguese, or Urdu. The survey contained a number of questions about the riders' demographics and household circumstances. It also asked about their motivations for working on the Deliveroo platform, how they prioritise different features of work and how they feel about some of the benefits and protections currently being debated. Participants were asked about their satisfaction with various aspects of their work, drawing on established job quality questions from the Workplace Employment Relations Survey.<sup>xxviii</sup>

We decided to survey former riders as well, in recognition of the possibility that those with the worst experiences of working on the platform may have left it already, and so limiting ourselves to current riders may have painted an overly positive picture. For that reason, we asked Deliveroo to send survey invitations to a list of people that had been on the platform, but were no longer active. It is possible that former riders that were willing to respond to an email from Deliveroo were not the most disgruntled, but equally it is possible that those with particularly strong feelings (positive and negative)

may have been more motivated to share their opinions. Either way, we thought it was worth having a separate sample to compare current riders' responses to. The former rider survey was very similar to the current rider survey in terms of content.

It is worth emphasising that the former rider survey had a much smaller sample, with 268 responses, than the current riders survey. The findings from this survey should therefore be interpreted with caution, as it is considerably less precise in its estimates than the current rider survey.

The general workforce and wider gig economy surveys were conducted to put the data from the rider surveys in context, to understand how working on the Deliveroo platform compares to other gig work or more traditional employment. Again, these surveys substantially overlapped with the rider surveys, but with a focus on respondents' motivations and work satisfaction.

### **Focus groups**

We decided to supplement the survey with qualitative focus groups, allowing riders to provide richer, more detailed responses to our questions, and giving the space to provide more context regarding their work and life circumstances. Focus group participants were drawn from survey respondents, who were all given the chance to opt-in to the qualitative research. In total, we ran eight focus groups – seven for current riders, one for former riders – across the month of August 2021. In total 42 people took part: 35 current riders and seven former riders.

### **Deliveroo internal data**

As part of this research, Deliveroo also shared some of their internal data, allowing us to triangulate responses to the surveys and focus groups with objective data. We requested, and were permitted to see, data on riders' age, nationality, vehicle type, length of service, and average weekly hours – all at an aggregate rather than individual level. We also received some data on earnings: average price per order and average earnings per hour on delivery, showing how these had changed over the past three years. We further requested data on gender, ethnicity, educational status, and how rider working patterns vary, which Deliveroo were unable to provide as they do not hold it.

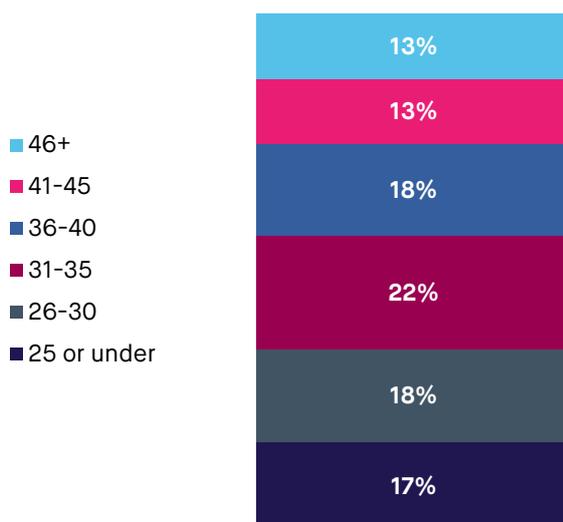
This data was helpful in validating the survey results, or in identifying what appear to be misperceptions, and we refer to it throughout the report. However, the commercial and legal sensitivity of this data meant that Deliveroo were unwilling for us to publish it in this report.

## CHAPTER THREE – WHO RIDES WITH DELIVEROO AND OTHER GIG ECONOMY PLATFORMS?

In the popular imagination, gig work is associated with certain types of people, typically on the fringes of the labour market. Students and young people starting out their careers are seen as archetypal people in the gig economy, rather than adults with responsibilities who rely on it for their living. Such perceptions have some basis in reality, but they appear to be less accurate year-on-year.

In 2018, the Public First survey found that 73% of Deliveroo riders<sup>xxxix</sup> were under the age of 35, and research conducted for BEIS estimated that 56% of all people doing gig work<sup>xxx</sup> were in that age bracket. Our 2021 surveys may not be exactly comparable, but they suggest that both have fallen. We find 57% of Deliveroo riders, and 43% of all people doing gig work, are under 35. The median age of a Deliveroo rider in our survey was 33 – still younger than the average worker in other industries, but not in most cases just embarking on their working lives. As Figure 1 shows, nearly a quarter of Deliveroo riders are aged over 40.

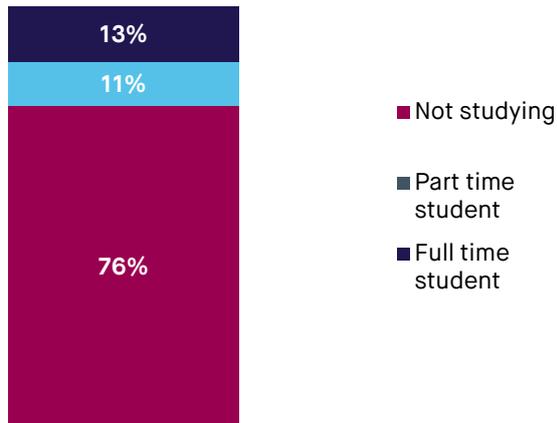
**Figure 1: Current Deliveroo riders by age**



Source: SMF Deliveroo Current Riders Survey July 2021

Around one in four Deliveroo riders are students, as Figure 2 shows. This, too, is lower than in 2018: Public First reported that 21% of riders were full-time students then, compared to 13% today.<sup>xxxi</sup> This discrepancy may be at least partly explained by the timing of the survey, with the present survey conducted in the middle of the summer, when students may have been on holiday, and following the pandemic, when many students' studies have been disrupted.

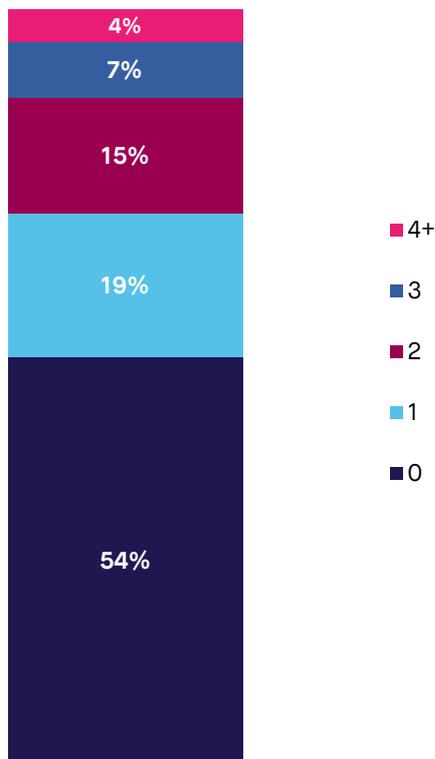
**Figure 2: Current Deliveroo riders by educational status**



Source: SMF Deliveroo Current Riders Survey July 2021

Our survey shows that many Deliveroo riders have family and caring responsibilities. Riders are more likely to have children than to be students. As Figure 3 shows, almost half report living with a child. A further 9% say that they are carers.

**Figure 3: Current Deliveroo riders by number of children in the home**

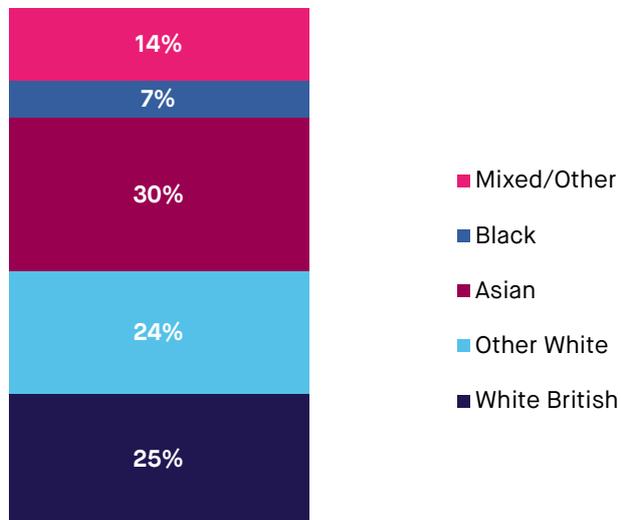


Source: SMF Deliveroo Current Riders Survey July 2021

Our survey found that riding with Deliveroo remains an overwhelmingly male occupation, although again, slightly less than before. 87% of respondents to our current rider survey were men, compared to 93% in the Public First survey. Reflecting Deliveroo’s origins in the capital, and the fact it is the platform’s largest market, Londoners are more likely to ride on the platform than those elsewhere in the country: 38% of participants in the current rider survey were in London, compared to 15% of British people in employment.<sup>xxxii</sup>

Deliveroo riders are also disproportionately likely to be from ethnic minorities compared to the general population. Among respondents to our survey, around half identified as non-White, and only a quarter said they are White British, English, Scottish, Welsh, or Irish. 50% said they have some other national identity than British.

**Figure 4: Current Deliveroo riders by ethnicity**



Source: SMF Deliveroo Current Riders Survey July 2021

## CHAPTER FOUR – WHAT DO DELIVEROO RIDERS AND OTHER PEOPLE DOING GIG WORK WANT FROM THEIR WORK?

### **How ‘committed’ are Deliveroo riders to their work?**

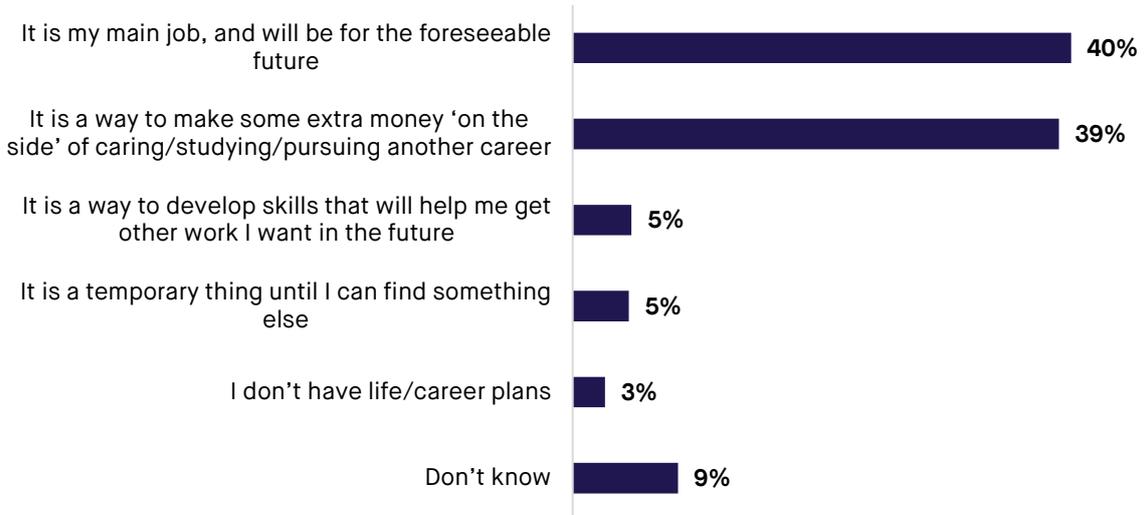
One way of thinking about the approach taken by Deliveroo riders, and indeed other people doing gig work, to their work is in terms of their level of ‘commitment’. By this we do not mean anything per se about their effort or professionalism working on platforms. It is more about how significant the gig work is to their careers and livelihoods over their lifetime. In this sense, high commitment to a role involves being more financially dependent on it, spending more hours or years doing it, seeing it as a greater part of your life plans. By contrast, low engagement roles are seen as temporary or stopgap, or secondary or supplementary to other work or activities.

The gig economy seems well set up for people that need low commitment work: students, people with other jobs trying to ‘top up’ their earnings, or parents and carers looking to dip a toe in the labour market alongside their other responsibilities. As a consequence, it is natural to assume that most gig work will be low commitment.

This might also seem to have implications for the rights and protections offered to those working in the gig economy. To the extent that they are perceived to be low commitment, this would seem to make it more palatable for them to go without the benefits that tend to go along with higher commitment work. For example, things like pensions, sickness/holiday pay, and paid parental leave may seem like unnecessary bureaucracy for transient people that are unlikely to build up much in the way of entitlements.

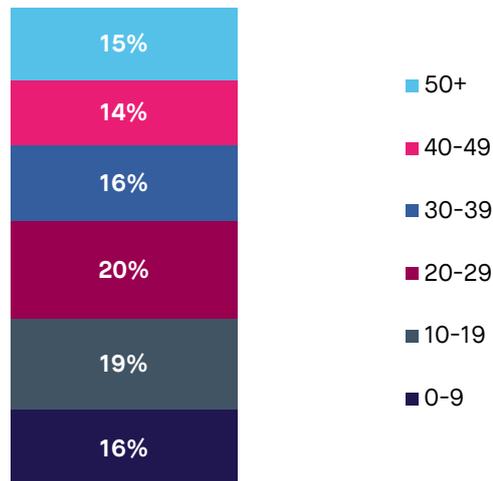
The evidence we have collected paints a picture of riders that is far from simple, with nuances that analysts and policymakers should note with care. Broadly, most riders are not particularly committed to or dependent on their Deliveroo work. They may be of less interest to policymakers and commentators, since they are likely to be content with the mixture of flexibility and benefits that they currently have. Yet there is also a non-trivial minority of riders who do show significant dependence on riding. This group, which appears to be growing, could merit greater attention from platforms and/or policymakers in future, since that dependence has the potential to create issues that might merit a response.

Our survey indicates that there are sizeable numbers of both high and low commitment Deliveroo riders, though low commitment riders are more numerous. As Figure 5 shows, around half of Deliveroo riders see the work as a ‘side job’ or stepping stone. By contrast, two-fifths consider working on the platform to be their main work, and expect it to be so for the foreseeable future.

**Figure 5: “Where does working with Deliveroo fit into your life and career plans?”**

Source: SMF Deliveroo Current Riders Survey July 2021

Another indicator of commitment is how long people spend working on the platform – how close it is to a full time job, or merely a few hours here and there. Again, these suggest a substantial proportion of riders are heavily engaged in their Deliveroo work. Median reported working hours are 25 hours a week.<sup>xxxiii</sup> Figure 6 shows that almost a third of riders say they work over 40 hours a week – more indeed than a typical full time job.

**Figure 6: “How many hours a week do you typically ride with Deliveroo?”**

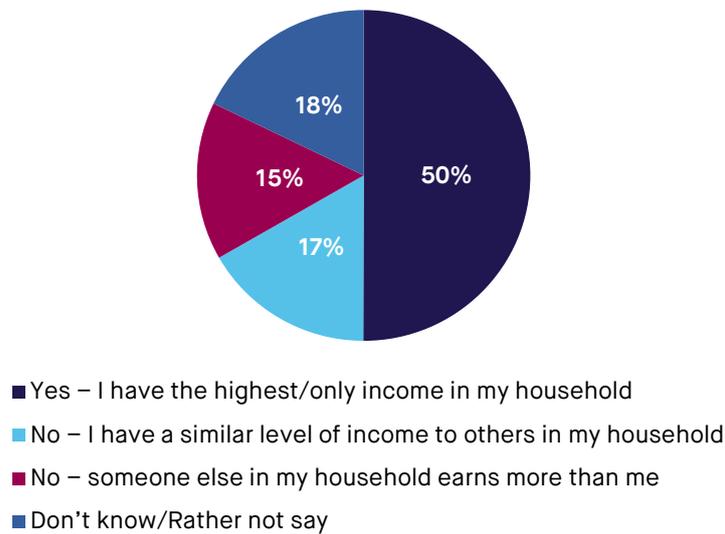
Source: SMF Deliveroo Current Riders Survey July 2021

However, these reported hours should be taken with some caution. According to internal data shared by Deliveroo, riders spend a fair amount less time logged onto the app than these survey results would suggest. A clear majority are on the platform for less than 25 hours a week, and a very few are on it for more than 45 hours. This

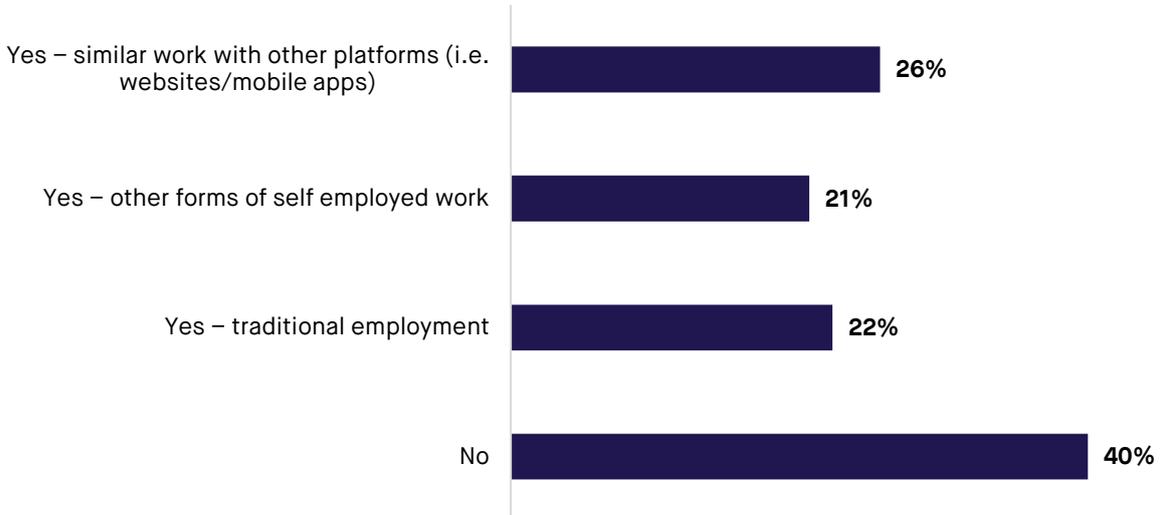
discrepancy could be due to riders counting time they are not on the app (e.g. travelling into town to start work). Given that many riders ‘multi-app’, it could also reflect them failing to distinguish time doing jobs on other platforms from time they are doing deliveries sources through Deliveroo. It is likely also a consequence of a broader tendency for people to overstate their working hours in self-reported surveys.<sup>xxxiv</sup> In any case, relying solely on the survey results may somewhat overstate the number of highly committed Deliveroo riders, but they show that many riders *perceive themselves* to be working long hours for the platform.

While most Deliveroo riders have other sources of income for themselves or their families, some get most of their work and income from the platform. 50% of riders are the primary earners for their household, and two-thirds are either the primary earner or share that responsibility with another. Though 60% have other sources of work, 40% work exclusively with Deliveroo. 19% of riders are both the main providers for their household *and* rely solely on the app to earn money.

**Figure 7: “Are you the primary earner in your household?”**

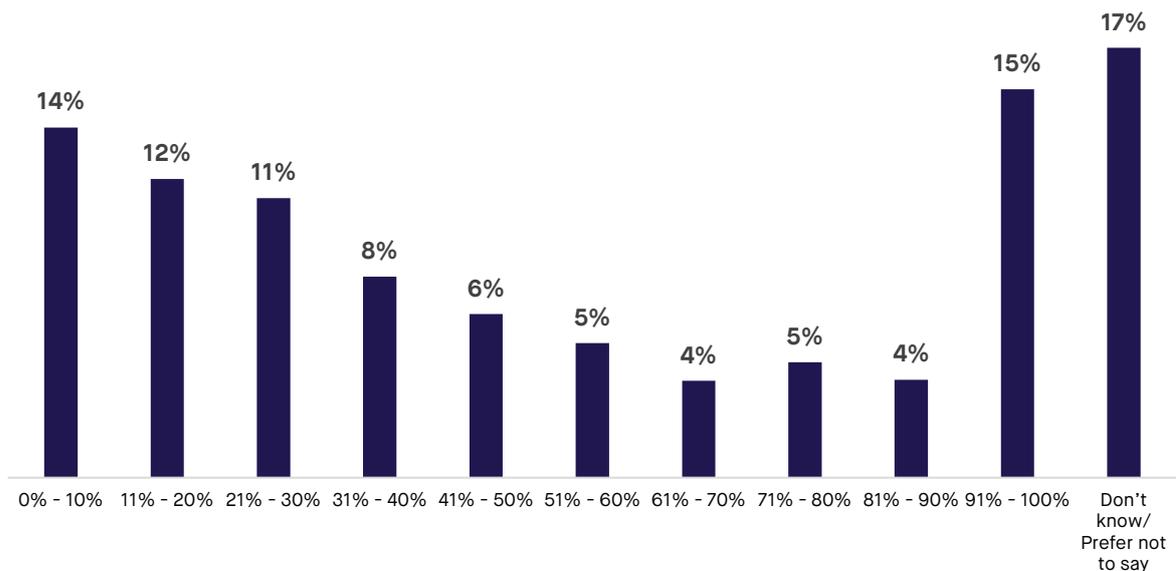


Source: SMF Deliveroo Current Riders Survey July 2021

**Figure 8: “Do you do any other work besides riding with Deliveroo?”**

Source: SMF Deliveroo Current Riders Survey July 2021

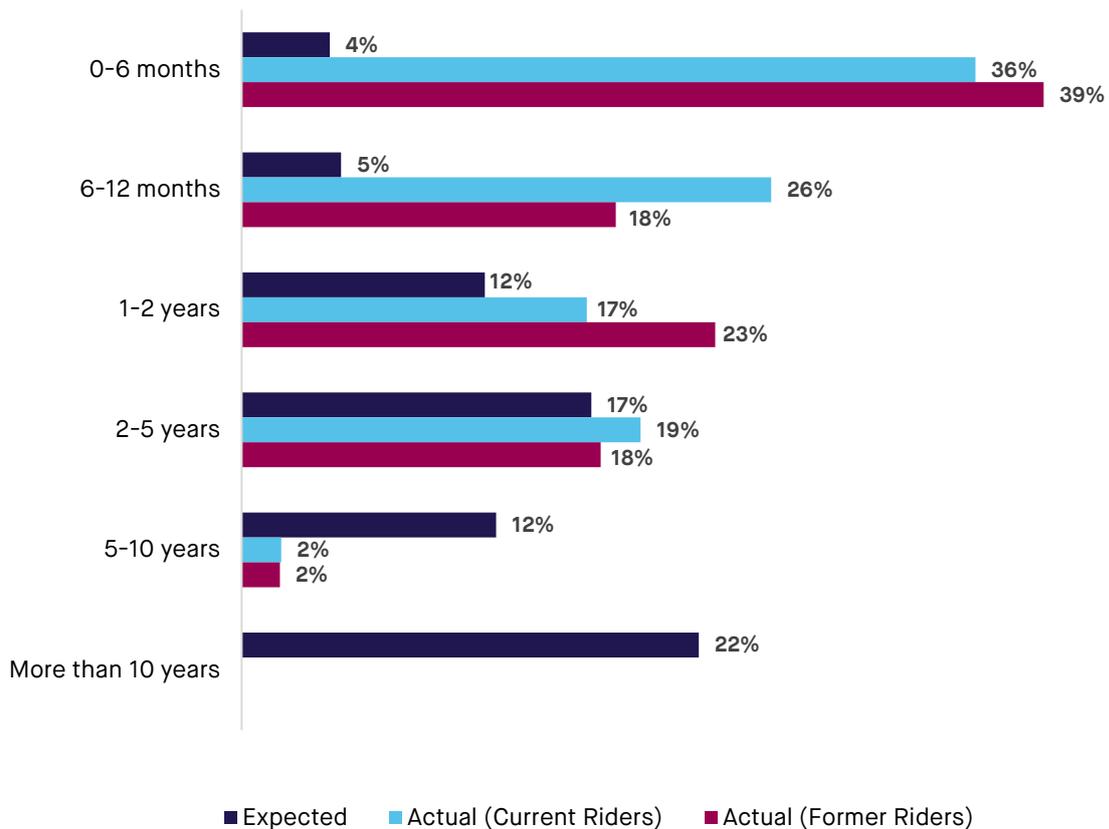
Asked what proportion of their income comes from riding with Deliveroo, there is a fairly wide spread of responses from current riders, with the median response being around half. Again, though, while three-quarters of riders get a large fraction of their income from other sources, a sizeable minority – around a quarter (24%) report that over 70% of their income comes from work sourced through the app. The gap between the 40% that say they work exclusively for Deliveroo and the 15% that say over 90% of their income comes from riding on the platform could be explained by the earnings of other people in the riders’ households or other sources of income like benefits or student loans.

**Figure 9: “Approximately what percentage of your income comes from riding with Deliveroo?”**

Source: SMF Deliveroo Current Riders Survey July 2021

Perhaps the most striking finding regarding Deliveroo riders' commitment relates to how long they plan to keep working on the app. Figure 10 shows that one in three current riders intend to still be riding with Deliveroo in five years' time, and that one in five expect to still be doing it 10 years from now. Comparing these predictions with the actual length of tenure reported by former riders suggests that this may be rather over-optimistic: only 9% of current riders expect to leave within a year, but 57% of former riders did not make it that far. This does not appear to be due to differences in commitment between the samples of current and former riders: as Figure 10 shows, the former riders seem to be of comparable tenure to the current riders.

**Figure 10: Expected and actual length of time working with Deliveroo**



Note: Don't knows not shown

Source: SMF Deliveroo Current Riders Survey; Former Riders Survey July 2021

The proportion of Deliveroo riders that expect to stay on the platform long-term is quite remarkable, flying in the face of perceptions that gig work is temporary and itinerant and showing that many riders clearly do not feel that way. Indeed, Figure 11 shows that Deliveroo riders expect to remain on the platform for longer than the average worker expects to stay in their job: 34% Deliveroo riders anticipate doing the same thing in five years' time compared to 25% across the whole workforce. However, it also indicates that this is not typical of the gig economy at large – other gig workers are below average in terms of the length of time they plan to stick with their jobs.

**Figure 11: “How long do you expect to continue in your current job?”**

Source: SMF Deliveroo Current Riders Survey; SMF Opinium General Workforce & Wider Gig Economy Surveys July 2021

We cannot offer a full explanation as to exactly why Deliveroo riders say they expect to continue riding for so long. However, it clearly seems to indicate (in line with our findings below) that riders like the work, or find it better suited to their needs and preferences than other alternatives. It may also reflect differences in the structure of platform work – being lower commitment than traditional employment and easier to combine with other work, they may see no reason to leave.

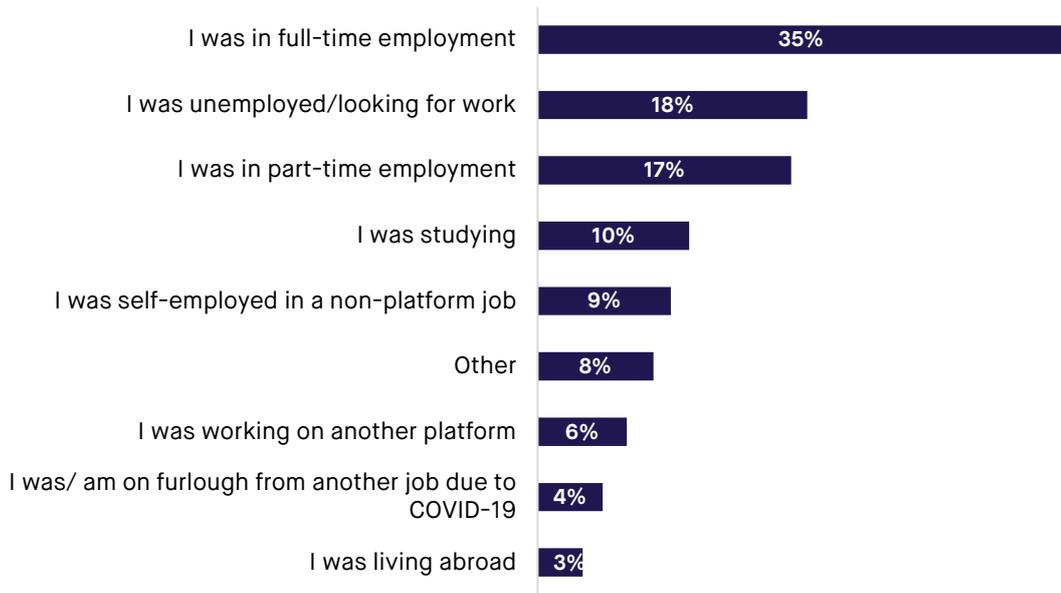
### Why do they choose to work in the gig economy?

The evidence from both our survey and our focus groups suggests that the majority of Deliveroo riders actively choose to work in the gig economy, recognising the trade-offs it entails, but seeing it as their best option given their preferences. It is not, in most cases, something they feel forced into by a lack of alternatives, but rather a deliberate and positive choice.

29% of Deliveroo riders say they already had a job when they joined the app, which they chose to leave or supplement. 27% believe they could have found traditional work if they wanted it. Only 12% say that they could not have found work elsewhere. However, 24% said that their only acceptable options came from gig economy platforms.

Figure 12 shows that the majority of Deliveroo riders came from some form of employment, and only one in five were on furlough, looking for work or unemployed prior to starting work on the platform. That offers further evidence that most riders had other options – usually in traditional employment – that they passed over in favour of riding with Deliveroo.

**Figure 12: “What did you do before becoming a Deliveroo rider?”**

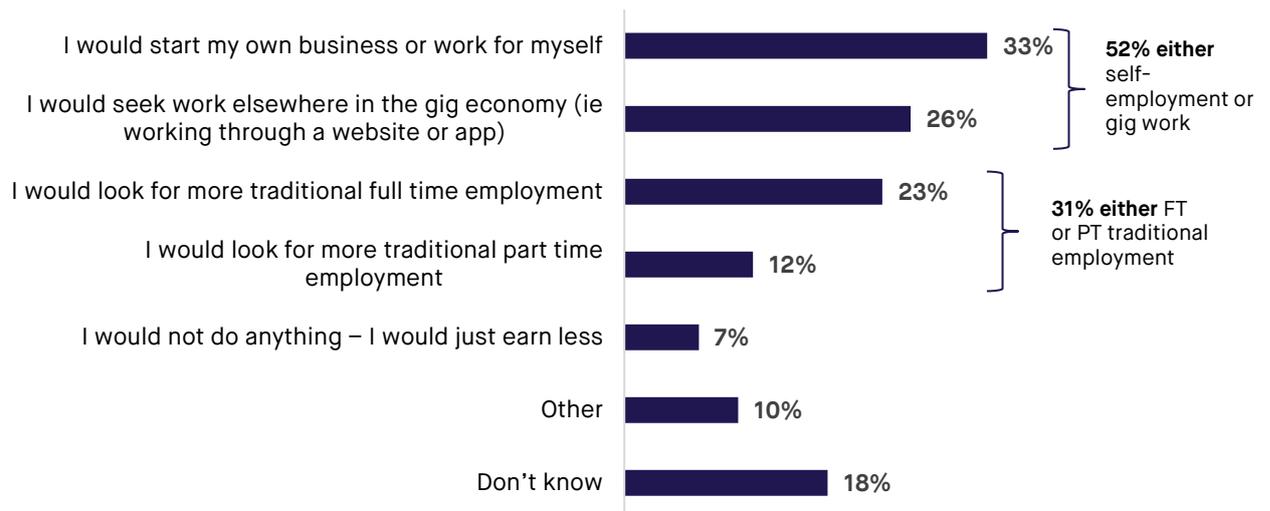


Note: does not sum to 100% as respondents could select multiple options

Source: SMF Deliveroo Current Riders Survey July 2021

This apparent preference for independent work is reflected in the fact that 52% of Deliveroo riders say that they would either start their own business or seek work elsewhere in the gig economy if they could no longer work with Deliveroo. By contrast, 31% say they would look for more traditional employment, and only 19% say they would be searching for solely traditional employment (i.e., 12% would pursue both options).

**Figure 13: “If you could no longer work with Deliveroo what would you do instead?”**

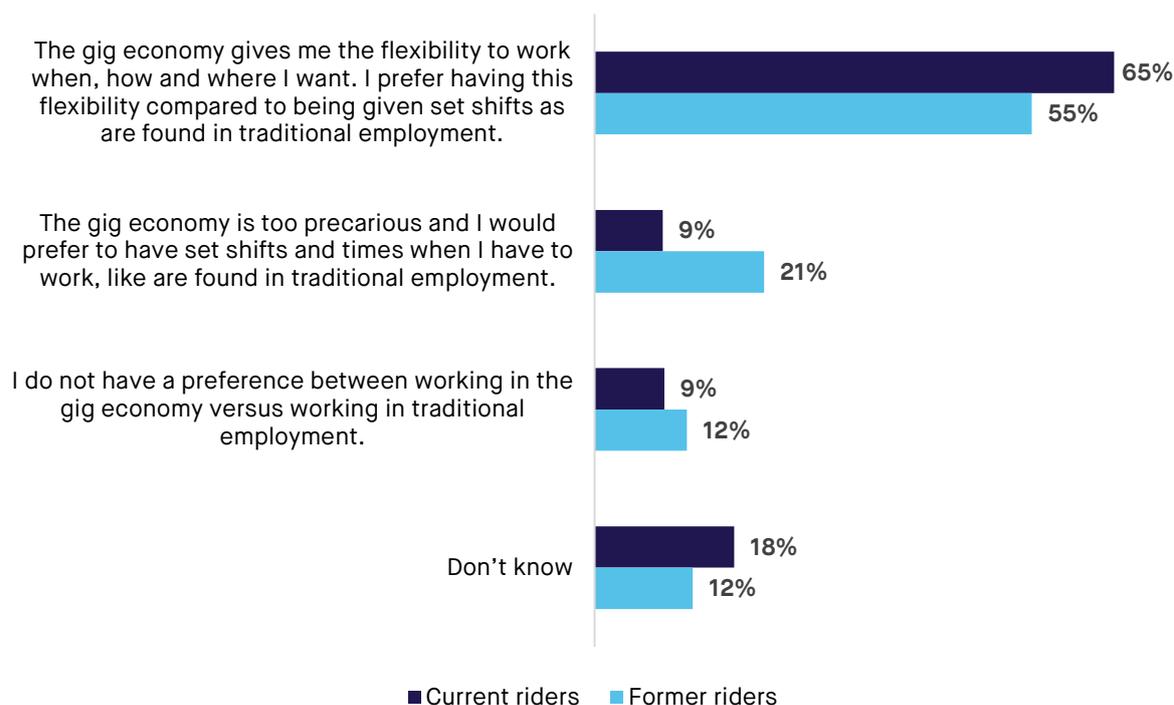


Note: does not sum to 100% as respondents could select multiple options

Source: SMF Deliveroo Current Riders Survey July 2021

Moreover, these positive attitudes towards gig work were reflected among those that have left Deliveroo as well. 55% of former riders say that they prefer the flexibility of working in the gig economy to the rigidity of traditional employment – indicating that most did not leave because of issues with the specific model of gig work. However, a significant minority – 21% – did say that they found gig work to be too precarious.

**Figure 14: “Which of the following statements best reflects your views about the gig economy, based on your experience riding with Deliveroo?”**

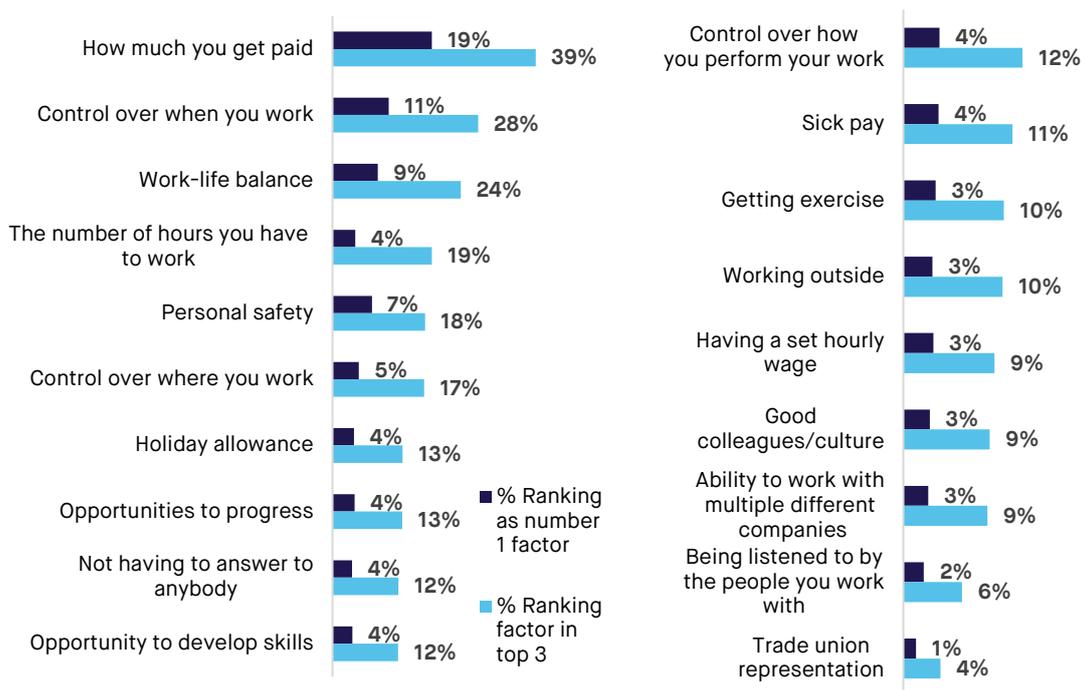


Source: SMF Deliveroo Current & Former Riders Survey July 2021

Why, then, do riders actively favour gig work? What are they seeking to get out of it? Figure 15 shows that that pay is a very important factor in why Deliveroo riders choose their work. One in five riders put pay at the top of a list of factors in deciding how and where to work, and two-fifths put it in their top three. Despite some of the controversy around earnings in the gig economy (which we discuss below), 57% of Deliveroo riders agree with the statement “I feel I earn more riding with Deliveroo than I would have as an employee in a similarly skilled traditional job”, with 20% disagreeing.

In the context of riders and pay, it is notable that only 3% say a fixed hourly wage is the most important factor in choosing work, and 9% list it as a top three issue. This may suggest that riders view their total pay as more significant than their hourly rates, though that might be expected from a sample of people who have chosen to work without a fixed hourly wage. Similar points could be made about riders’ attitudes towards traditional employment benefits such as sick pay (4% and 11%) and holiday allowance (4% and 13%). These findings support the analysis of riders as making conscious choices, aware of the trade-offs entailed in their chosen work.

**Figure 15: “How important are the following factors to you in choosing a job?” – Current Riders**



Source: SMF Deliveroo Current Riders Survey July 2021

However, Figure 15 also demonstrates the diversity of motivations among Deliveroo riders. While pay is clearly out in front as the leading consideration, 60% do not consider it among their top three factors in choosing work. Figure 15 highlights the importance to Deliveroo riders of a number of factors related to their autonomy and independence. Around 1 in 10 cite control over when they work and work-life balance as their main consideration in choosing work, with control over work location also a prominent consideration, coming sixth in the list.

Focus group participants offered a range of reasons for joining the gig economy and riding with Deliveroo – from changes in their financial position (especially following the pandemic) to a desire to improve their work-life balance to having more flexible work:

*“I had an early-start business that started not long before the pandemic. But I folded it early doors, and I like working when I want to work.”*

*“I’m a single parent, so was looking for some kind of flexible job. I did not want to commit to fixed hours because I have to look after my child. The main reason for joining is so I can choose my own hours.”*

*“I have a full-time job and started doing part-time Uber driving because my wife lost her job, so I needed a second job to up my income. The taxi business dried out during covid, so my children suggested I joined [Deliveroo].”*

*“Before Deliveroo I was bar staff, but they didn’t pay very well. After that I started with Deliveroo and now I can’t go back. The pay is much better.”*

*“Before I did Deliveroo I used to be general manager of a pizza delivery company, I left that job because drivers of mine were getting paid more than me,”*

Figure 16 shows how current Deliveroo riders’ work preferences compare to former riders and workers in other parts of the economy. It shows that their prioritisation of pay is far from unusual: every group tends to put this as the most important factor in choosing work. Deliveroo riders are slightly less likely to put rates of pay in their top five reasons for choosing work than the average worker – but significantly more likely to be pay motivated than others in the gig economy.

Compared to others, even others in the gig economy, Deliveroo riders care a lot more about having control over when and where they work. 40% of current riders put the ability to choose their hours in their top five criteria, compared to 20% of the general workforce. 30% said they value being able to pick their place of work, compared to 21% of the general workforce.

On the other hand, Deliveroo riders (and those in the gig economy) seem less averse to working long hours – 44% of the general workforce said that the number of hours they have to work is in their top five reasons for choosing work, compared to a third of Deliveroo riders and 29% of those in the wider gig economy. They also care less about holiday allowance, which 30% of all workers listed as a priority, but only 24% of all those in the gig economy and 22% of current riders. This fits with the relatively lower weight gig workers put on work-life balance. Whereas for the average worker, work-life balance is a leading consideration in choosing work, on a par with pay in terms of its importance, Deliveroo riders and other gig economy users are considerably less likely to list it as a priority. It may also reflect the fact that work-life balance is easier to maintain in their day-to-day work as a result of its flexibility.

The other striking difference between Deliveroo riders and other workers is that riders (and those in the wider gig economy) seem to be more solitary. Whereas working at an organisation with good colleagues and culture is the fourth most popular consideration among the general workforce, cited by 40%, it is much further down the list for current Deliveroo riders (17%).

**Figure 16: “How important are the following factors to you in choosing a job?”**

|  | % Ranking in Top 5 |               |                   |                   |
|--|--------------------|---------------|-------------------|-------------------|
|  | Current riders     | Former riders | Wider gig economy | General workforce |
| How much you get paid  | 52%                | 56%           | 38%               | 62%               |
| Control over when you work   | 40%                | 37%           | 27%               | 20%               |
| Work-life balance  | 38%                | 47%           | 42%               | 62%               |
| The number of hours you have to work                               | 32%                | 33%           | 29%               | 44%               |
| Control over where you work  | 30%                | 25%           | 29%               | 21%               |
| Personal safety  | 28%                | 27%           | 25%               | 18%               |
| Opportunities to progress  | 23%                | 26%           | 27%               | 26%               |
| Holiday allowance  | 22%                | 17%           | 24%               | 30%               |
| Not having to answer to anybody                                    | 22%                | 21%           | 20%               | 13%               |
| Control over how you perform your work                             | 22%                | 22%           | 27%               | 22%               |
| Opportunity to develop skills                                      | 21%                | 19%           | 25%               | 22%               |
| Getting exercise   | 19%                | 27%           | 22%               | 13%               |
| Sick pay   | 19%                | 18%           | 23%               | 20%               |
| Working outside  | 18%                | 13%           | 18%               | 8%                |
| Good colleagues/culture  | 17%                | 24%           | 30%               | 40%               |
| Ability to work with multiple different companies at the same time | 15%                | 16%           | 16%               | 7%                |
| Having a set hourly wage   | 15%                | 20%           | 21%               | 17%               |
| Being listened to by the people you work with                      | 11%                | 14%           | 21%               | 22%               |
| Trade union representation   | 7%                 | 9%            | 18%               | 9%                |

Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinion General Workforce & Wider Gig Economy Surveys July 2021

All that said, these differences should not be overstated. In many – perhaps most – regards, gig workers are similar to traditional employees in their priorities, albeit that Deliveroo riders tend to be more different from average than others doing gig work. As well as a shared interest in good pay, work-life balance, and some degree of autonomy, it is notable that workers of all types care about opportunities to progress and the ability to develop their skills. Interestingly, there is minimal difference between Deliveroo riders, others doing gig work and the rest of the workforce in the extent to which they value sick pay.

## CHAPTER FIVE – HOW SATISFIED ARE DELIVEROO RIDERS AND OTHERS DOING GIG WORK WITH THEIR WORK?

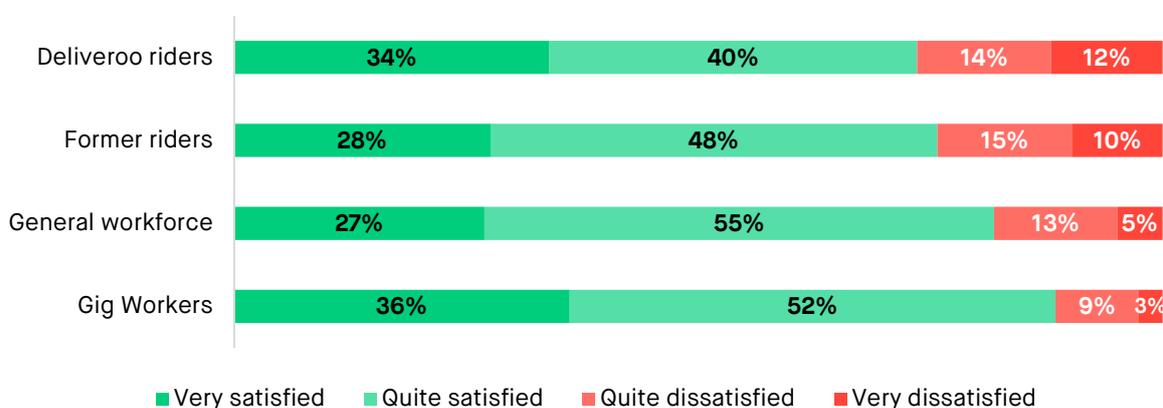
Chapter four set out Deliveroo riders' motivations for working on the app, and the similarities and differences in these motivations from others doing gig work and the wider workforce. In this chapter, we examine how well the work lives up to these expectations: Deliveroo riders' satisfaction with their work, and how this compares to job satisfaction in the wider economy.

### Overall satisfaction

As Figure 17 shows, overall satisfaction among Deliveroo riders is very high: three-quarters of current riders say they are satisfied in their work, and a third say they are very satisfied. This is slightly lower than reported satisfaction in Deliveroo's internal rider surveys, which was 84% in the third quarter of 2021.<sup>xxxv</sup> Though Deliveroo's own tracker and our survey use very similar question wording, they are not directly comparable, not least because our survey was explicitly independent of the company and so may have encouraged different participants or responses. The Deliveroo figure relates to the global workforce, ours just to the UK. It is also possible that some of the discrepancy between the surveys is random noise.

It is also notable how positive former riders are about their time working on the platform now they have left: while they are slightly less likely to say they were very satisfied than current riders, reported overall satisfaction is almost the same.

**Figure 17: Overall job satisfaction<sup>1</sup>**



Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinium General Workforce & Wider Gig Economy Surveys July 2021

In fact, work satisfaction is high across the economy – the average worker is slightly more likely to be satisfied with their work (82% satisfaction vs. 74% for current riders), and rates of satisfaction are even higher for those in the wider gig economy (88%).

<sup>1</sup> For current riders, “How satisfied are you, overall, riding with Deliveroo?”; for former riders, “How satisfied were you, overall, riding with Deliveroo?”; for general workforce/gig workers “How satisfied are you, overall, with your job?”

Relatively few (12%) of Deliveroo riders say they are ‘very dissatisfied’ in their work, but this is a higher proportion than other occupations.

While perceptions of the work were mostly positive, focus group research showed that participants’ attitudes to Deliveroo were mixed. Many respondents were satisfied overall, while some were more ambivalent or felt there was some room for improvement – very few expressed extreme dissatisfaction or regret.

*“I like working for them immensely. It’s one of the few jobs I’ve enjoyed working to be honest.”*

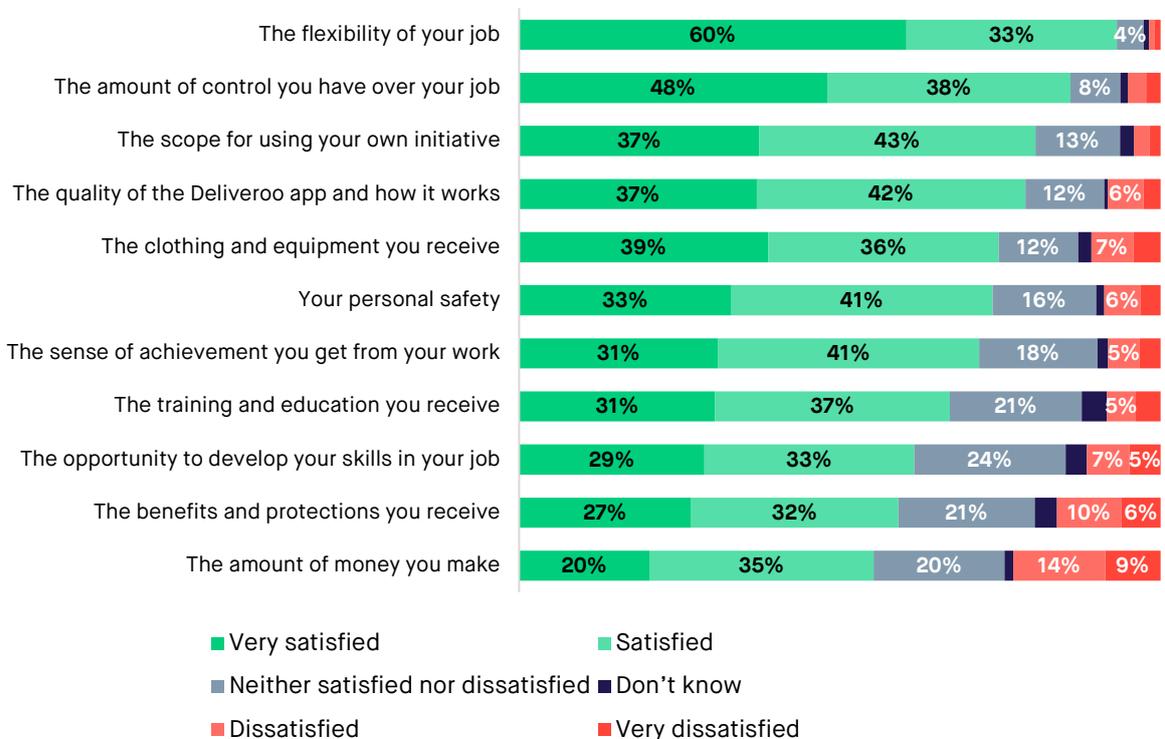
*“It’s like Marmite, you either love it or hate it.”*

*“80% I’m not happy with, there’s 20% good stuff.”*

### Flexibility & Autonomy

Figure 18 looks more specifically at how current riders feel about particular elements of their work. It shows that on all dimensions, the majority of riders are satisfied, but the level of this satisfaction varies between different aspects of the work. Riders are overwhelmingly positive about the level of autonomy they have. 93% say they are satisfied with the flexibility of working on the app, and over 80% with the amount of control and scope for using their initiative. Hardly anybody in the survey voiced dissatisfaction on these points.

**Figure 18: “How satisfied are you with the following aspects of your work with Deliveroo?”**



Source: SMF Deliveroo Current Riders Survey July 2021

Riders' enthusiasm for flexible working was also evident in the focus groups, with flexibility often described as the main reason for joining Deliveroo in the first place. Most focus group participants said they liked working in the gig economy because of the freedom it gave them both in and outside of work:

*"The gig economy has its purpose, and we enjoy that its purpose is to ensure flexibility. That's the beauty of it."*

Participants emphasised the casual nature of the platform – starting and finishing work when they please, earning additional income quickly, and not having to report to a boss – as positive features of the arrangement. Many riders said that not being tied down to a particular working structure – even to a certain geographic place – was why they enjoyed riding:

*"Normal 9 to 5, 8-hour jobs are bound. We are not bound."*

*"It's great because you can pick up orders, turn off, do it again. It's flexi, it's the best thing about it."*

*"I really like working for Deliveroo because I'm at uni at the moment so it gives me the freedom to work whenever I want. Also, because I'm going back and to uni, I can work in two different locations."*

Many focus groups participants said they started riding with Deliveroo because it aligns with their constraints, responsibilities, or lifestyle. Some in particularly difficult or demanding situations said that using the platform was the only way they could work. The flexibility and ease of access to income that Deliveroo provides was reported as a helpful, even necessary option of support for riders, across a variety of circumstances.

*"I enjoy Deliveroo. Because I'm a student, it fits perfectly with my schedule, it is the most flexible option for me."*

*"I'm a single parent, so was looking for some kind of flexible job. I did not want to commit to fixed hours because I have to look after my child. The main reason for joining is so I can choose my own hours."*

*"I started because of the pandemic. I worked in schools normally as a teacher and schools were closed, so Deliveroo helped me stay alive, basically."*

*"I enjoy to work [sic] with Deliveroo because we have some kind of liberty, we choose the times we want to work, where we want to work. Arriving in this country it was easy for us to join Deliveroo."*

*"I haven't been with Deliveroo for that long. I was part of a motorcycle accident which stopped me from working, so I got a bicycle and started making a little bit of money with Deliveroo."*

### Arran's story

The positivity of riders towards the flexibility of riding with Deliveroo is perhaps best personified by Arran<sup>2</sup>, a student pursuing a career in acting and music.

*"The perk for me is the flexibility, and the greatest perk [of] Deliveroo."*

For Arran, Deliveroo gives him sufficient income and the freedom needed to allow him to study and to focus on his creative interests. He likes not being obliged to work a fixed number of hours each week, being paid weekly rather than monthly, and being able to ride in multiple locations. Arran lives in one town but his girlfriend lives in another, and so he appreciates the ability to work in both locations.

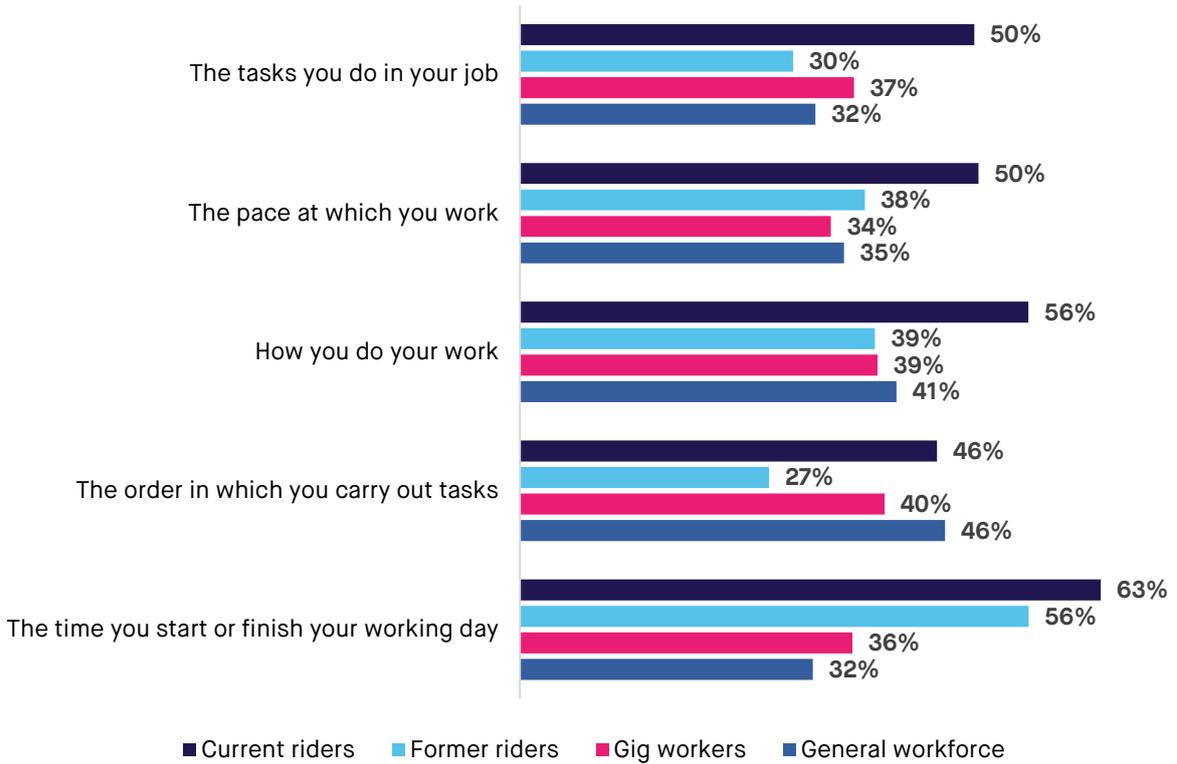
Arran prefers to be self-employed, and said he would feel trapped in a traditional job. He sees himself riding with Deliveroo in the future, for however long he needs it, to support his wider aspirations.

*"I'm a rapper and producer, so will be riding with Deliveroo until things hopefully blow up."*

Another indication of the fact that Deliveroo riders really do perceive themselves as having more independence and flexibility in their work is the fact that around half of current riders say they have 'a lot of control' of the tasks they do, the pace at which they work, how they do their work, the order in which they do their tasks, and nearer two-thirds say they have a lot of control over their start and end times. As Figure 19 shows, that is considerably higher than those elsewhere in traditional or gig work.

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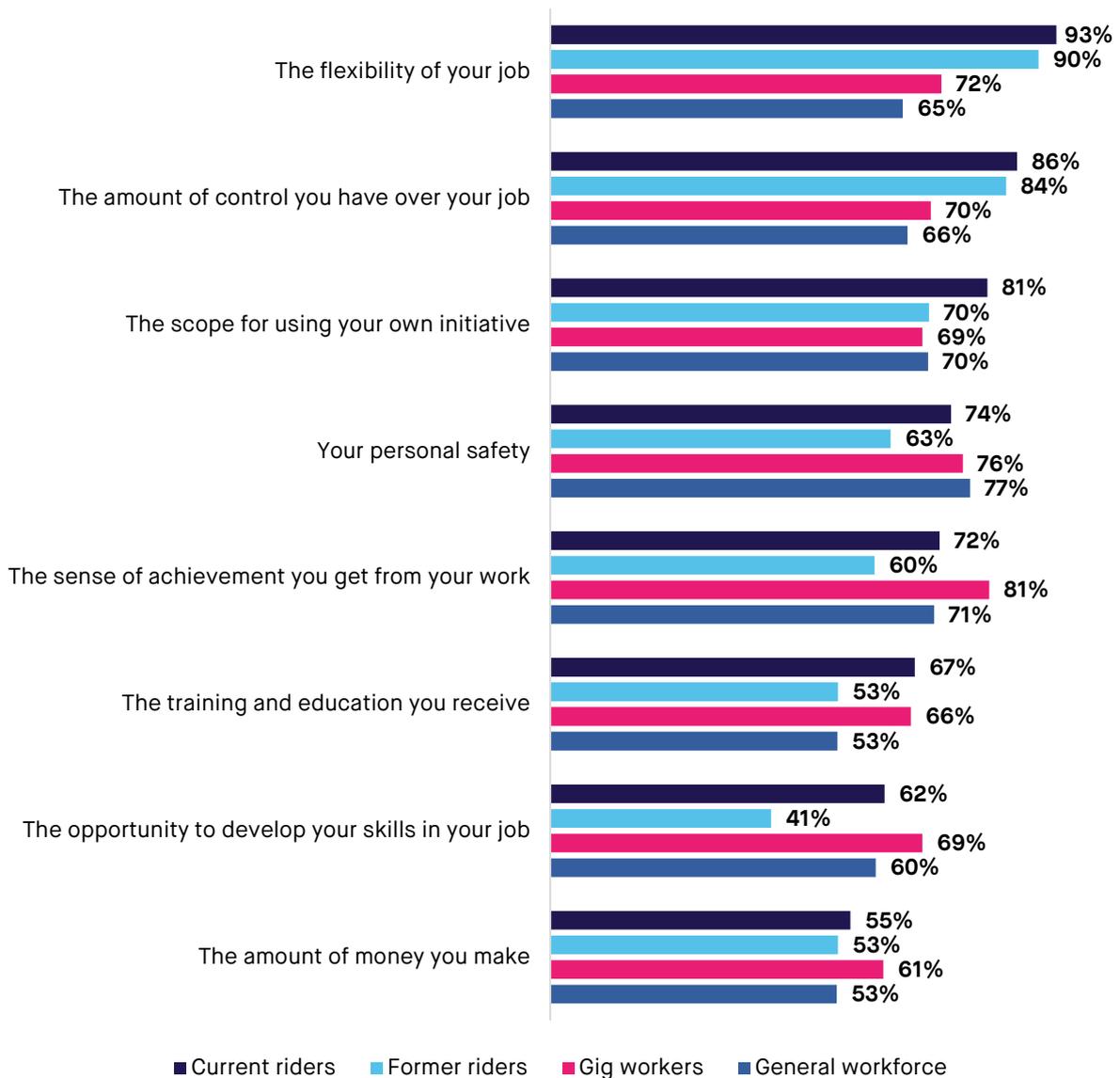
<sup>2</sup> Not his real name

**Figure 19: Proportion of respondents saying they have ‘a lot’ of control over...**

Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinium General Workforce & Wider Gig Economy Surveys July 2021

The views of former riders are less clear. Figure 19 would seem to indicate that they are no more positive about the level of control they had in Deliveroo work than the average worker. Yet former riders’ reported levels of satisfaction with the amount of control and flexibility they had working for Deliveroo is similar to current riders, as Figure 20 shows.

**Figure 20: Proportion of respondents satisfied with the following aspects of their work**



Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinion General Workforce & Wider Gig Economy Surveys July 2021

In fact, Figure 20 shows that current Deliveroo riders are more satisfied with their work on almost every dimension than workers elsewhere in the economy. In line with the high perceived autonomy described above, Deliveroo riders see themselves faring much better than average on flexibility, control, and scope for using initiative. They are as likely as anybody else to be satisfied with the sense of achievement they get from their work, their prospects for skill development, and their pay. The only area where the typical worker is more likely to be satisfied is personal safety – but even there, the difference is marginal: 77% of workers on average are satisfied with their personal safety at work, compared to 74% of Deliveroo riders.

At the same time, Figure 18 demonstrates that Deliveroo riders do not feel equally positive about all aspects of their work, and satisfaction is lowest (though not

necessarily low in absolute terms) in three areas: pay, benefits, and opportunities for career development. The following sections take each in turn, as well as another issue that emerged from the focus groups – the idea of respect.

## Earnings

As we have seen, satisfaction is generally high among Deliveroo riders: 55% say they are satisfied or very satisfied with pay, a slightly higher rate than the 53% figure for the workforce in general, though slightly lower than the 61% for all gig workers. However, the single area of greatest dissatisfaction among current riders is earnings. The majority of riders say they are satisfied, but just under a quarter (23%) say they are not happy with the amount of money they make.

It is important to put this figure in context. Deliveroo riders are no more likely to say they are unhappy with their remuneration than workers elsewhere in the economy – the proportion of respondents to the general workforce survey to say they were dissatisfied with the amount of money they make is also exactly 23%. As noted above, 57% believe they earn more riding with Deliveroo than they could do in other similarly skilled work.

**Figure 21: Proportion of respondents satisfied with the amount of money they make**



Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinium General Workforce & Wider Gig Economy Surveys July 2021

Earnings were one of the most prominent issues throughout the focus group discussions. The overall tone of those sessions was less positive on pay than the survey. In the sessions, some riders voiced dissatisfaction with rates of payment, consistency of earnings and some said they made too little to meet their needs. Long waiting times at restaurants, 'double deliveries' (where fees are lower for a separate

order within the same delivery), and what some felt to be an opaque, unpredictable system were cited as concerns:

*“With regards to orders and waiting times, there’s no transparency with riders. Pay fluctuates... We don’t know what we’re going to get. I swear they make it up on the day.”*

*“At times pay can get close to or below the minimum wage, and there are costs. So Deliveroo should look at what their charging structure is... They need to look at how much they’re paying their drivers.”*

*“My general view is that I’m quite happy with Deliveroo the way I do it, but I wouldn’t like to do it as a full-time job because of the uncertainty and getting paid week-by-week.”*

Deliveroo insist that rates of pay for time spent on deliveries are always above the minimum wage. Indeed, internal Deliveroo data shows that average earnings per hour on deliveries are comfortably above the minimum wage, even with a margin for costs (such as vehicle maintenance) or indeed some time spent waiting for deliveries. It is possible that a small number of riders for some sessions, if they include time spent logged on but not on delivery, could on occasion earn below the equivalent of the minimum wage, at least when expressed as pounds earned per hour logged on the app (rather than pounds earned per hour spent on deliveries). But this is likely to be a very rare occurrence, due to occasional bad luck or misjudging the best time or place to work (or in some cases, the rider rejecting a large number of orders).

It is understandable from riders’ perspective why they might expect to earn more than the minimum wage for time logged on the app. For them, time spent travelling between or waiting for jobs may well feel like time spent working. At the same time, from the platform’s perspective, it is understandable why there is resistance to using time logged on the app as the basis for calculating hourly earnings. Riders logged on the app may refuse jobs or even be doing other work (given how many of them work from multiple platforms simultaneously). Moreover, if this measure was widely used it may be open to distortion or abuse – for example, riders could in theory log on at times of low demand or reject most or all of the deliveries they are offered, and it would appear as though they were underpaid. Both perspectives have some validity. While there is a reasonable case to be made that riders can be working even when they are not literally on delivery, it seems clear that they will *not* always be working when logged on.

The discrepancy between focus groups and survey in terms of pay satisfaction may be due to sampling bias – it is possible that riders unhappy about pay may have been more motivated to volunteer to participate in the focus groups to air those thoughts, though it is worth emphasising that focus participants were not in general particularly critical or negative regarding Deliveroo. It may be the case that those with louder complaints played an outsized role the discussion because the ‘silent majority’ of satisfied riders had less to say on the matter. However, it is also worth remembering that focus groups can allow people to express their views more fully, with more detail and context, whereas surveys inevitably ‘flatten’ perspectives. For a person to tick ‘satisfied’ on a survey does not tell us how strongly they feel about it, whether this overall satisfaction

is despite dissatisfaction with particular sub-elements or if it is relative to their expectations or alternatives.

Many riders expressed the belief that rates has fallen over time, with participants suggesting that longer delivery distances (and in some cases lower fees) have reduced their effective earnings:

*“The job itself is flexi, but there is no security. I’m happy to work for Deliveroo, but payments being reduced is a big concern. We are not making much money.”*

*“I started at beginning of pandemic, which was really good. But then suddenly you get a lot of hours and you have to do way more hours than you did back in the day, exhausting yourself to meet your target in order to make a living.”*

*“When I first started I was making good money, these days that magic is gone.”*

Internal data shared by Deliveroo suggests that this is a complex issue. The price per order received by riders has increased over recent months and years. However, growth in earnings per hour on delivery has been more volatile, offering some support to riders’ impression that orders seem to take more time to fulfil than they used to. Though this measure has declined slightly in 2021, it remains above the earnings per hour on delivery riders tended to get last year or the year before. It is also worth emphasising that these metrics do not account for time spent on the app without being offered or accepting deliveries, or any change in the cost of riding (e.g. fuel, car insurance, etc). Overall though, the data we have seen suggests no secular decline in earnings, and if anything a tendency towards earnings growth.

Earnings volatility was another frequently reported concern among focus group attendees, but it was seen as a double-edged sword. Because Deliveroo riders get paid by the order, rather than being on a fixed hourly rate, and because they are able to take advantage of payment ‘boosts’ and incentives, there is the potential to make a lot of money on the app. Several participants expressed that “smart” people were able to make much more money riding with Deliveroo than they could in comparable jobs with hourly wages. This, though, depends on developing an understanding of the best times and locations to work:

*“If you work peak hours then you can earn a lot more than minimum wage. If you’re smart about it. I prefer it to per hour jobs.”*

*“In a small area you are able to turn around orders quite quickly, so I can earn more money. If I was employed I don’t think I would make as much as I do now.”*

*“[Other delivery jobs] pay an hourly rate, but on Deliveroo you can get more than that if you’re smart and work the right times.”*

Overall, there was a general expectation that gig economy work will be relatively low paid. But there was also a recognition that the flexibility of the work means that earnings will reflect the hours they put in and how they choose to work. In the same way that many participants described using Deliveroo as a means to support their preferred lifestyle, the money they make is used to support or supplement those choices. Although some did see issues – especially for full-time riders that struggled

to meet their needs – these were seen as a price worth paying for flexibility, or even as an advantage of the model:

*“I joined last year because I started a course and I could not work all week. So it [Deliveroo] gave me extra money to cover most of my expenses. It is an opportunity to make more money while studying. It’s really helping me out.”*

*“The pay is not the best, but the gig economy is the way it is. It can’t be too structured.”*

*“In my main job I get quite a good salary, working night-shift. So I have quite a lot of time during the day. This is some extra profit, extra money. I’m pretty happy.”*

### Miguel’s story

Miguel<sup>3</sup> used to be employed as a courier, but had to stop working when the pandemic arrived due to being placed on furlough. Needing to pay bills and make additional income to provide for his two young children, he decided to ride with Deliveroo.

When the furlough scheme ended, Miguel gave up his job to join Deliveroo full-time. He prefers to be self-employed as it gives him a sense of freedom and autonomy that traditional jobs do not, and he has a positive view of the pay structure and its high earning potential.

*“You earn as much as you want to because you are your own boss. Your earnings potential are there for you if you want to achieve.”*

Miguel suggests that fees might have dropped during his time with the company, but that he doesn’t mind because he is still able to make a decent income – more than he would getting paid by the hour. Miguel believes he will continue riding with Deliveroo for the years to come.

*“Deliveroo is currently a long-term thing because of flexibility, the earning package”.*

### Occupational benefits

59% of current riders are satisfied with the benefits and protection that they receive. The figure is lower for former riders, but a full 43% of them say they were satisfied. Yet attitudes to benefits and protections are somewhat more complicated. Though only 16% of current riders say they are dissatisfied with the status quo (Figure 18) and benefits are not among the highest priorities for riders in choosing their work (Figure 15), that does not necessarily mean that riders would not appreciate more benefits if they were available. At the same time, it is clear that riders are not willing to give up

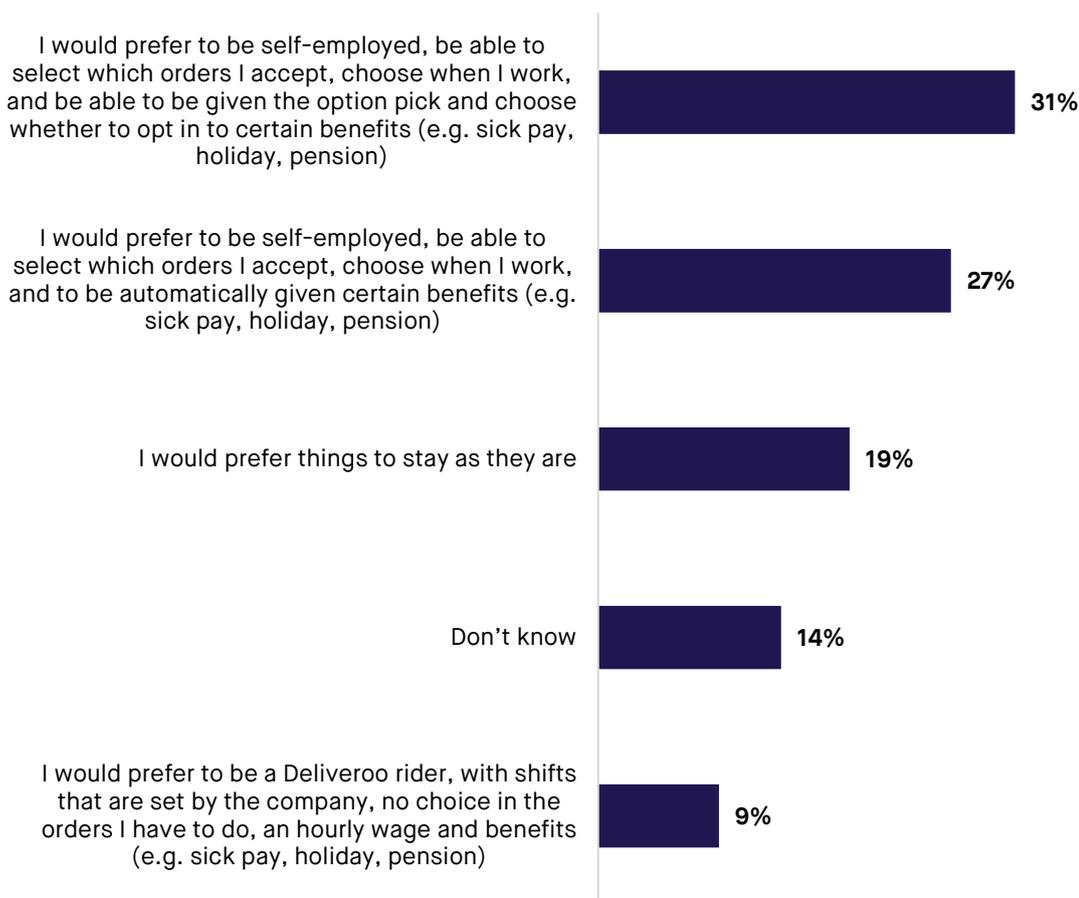
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<sup>3</sup> Not his real name

much, if any, flexibility in return for more generous benefits, and most seem strongly committed to remaining self-employed.

Figure 22 shows how riders feel about the trade-offs between self-employment and flexibility. 91% of riders would like to remain self-employed. 9% say they are in favour of becoming employees of Deliveroo and sacrificing flexibility over when and where they work in order to receive more benefits. The majority of riders say they would like to remain self-employed but with more benefits. This group of 58% is split fairly evenly between those who would like to opt-in to benefit schemes *a la carte*, and those who believe all benefits should be an automatic entitlement. The *a la carte* option lowers costs for riders, but would likely mean less generous benefits due to adverse selection (e.g. a paternity leave scheme funded only by those likely to take up the entitlement). In either case, there may be legal constraints and implications: providing certain occupational benefits may be deemed inconsistent with self-employed status for people working on platforms. There may also be economic considerations: platforms may have to or choose to reduce payment rates to cover the cost of such benefits.

**Figure 22: “Which of the following options best describes your views?”**

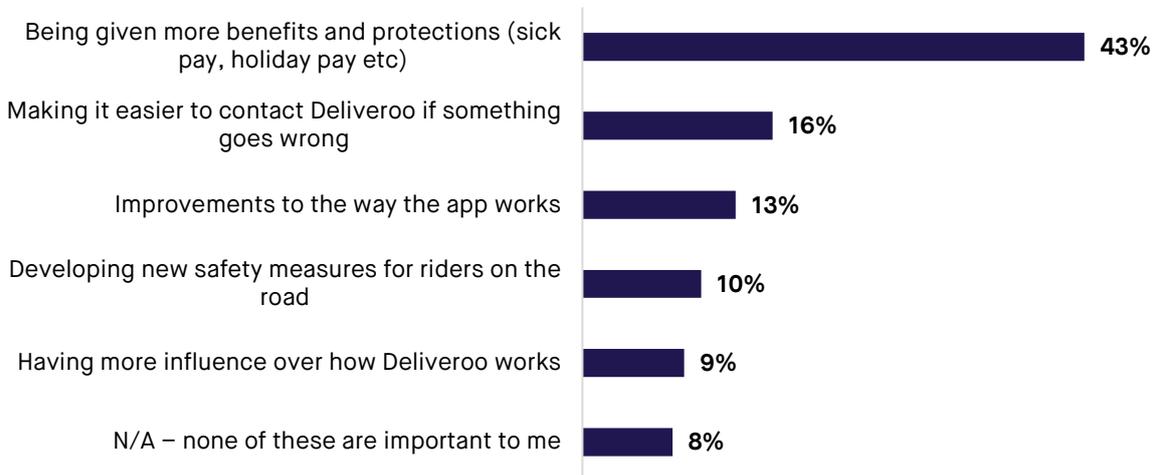


Source: SMF Deliveroo Current Riders Survey July 2021

A number of survey questions showed that riders have some appetite for occupational benefits, even if they are not their top priority and they might have difficulty

stomaching the trade-offs involved. When asked to consider a range of ways in which their work might be improved, 43% of current riders and 48% of former riders said that being given more benefits would be the best way – by some distance the most popular option (Figure 23).

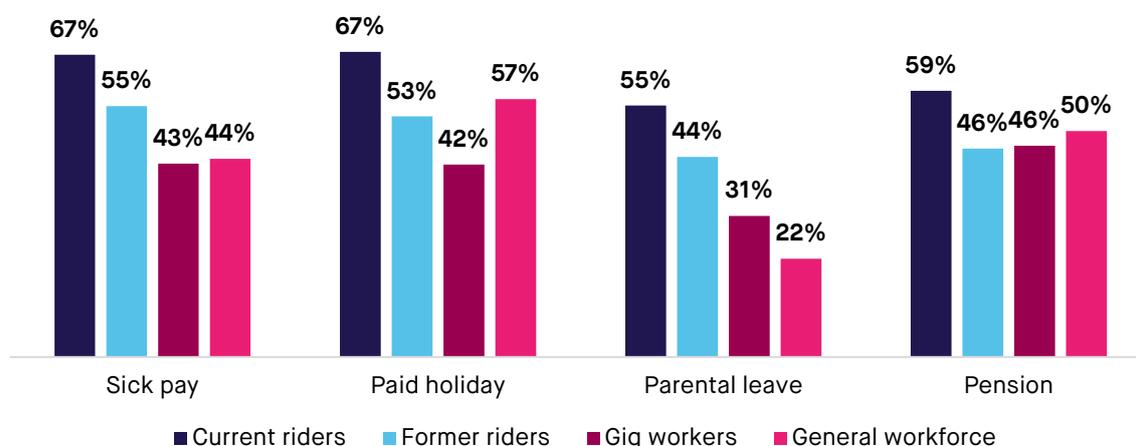
**Figure 23: “Which of the following is most important to you”**



Source: SMF Deliveroo Current & Former Riders Surveys July 2021

The vast majority of Deliveroo riders say they care about getting occupational benefits. 85% of current riders say that sick pay and paid holiday are ‘very’ or ‘somewhat’ important to them, 79% say the same of their pension and 73% of parental leave. As Figure 24 shows, current Deliveroo riders are significantly more likely to say these benefits are ‘very important’ than the rest of the workforce, others doing gig work or even former Deliveroo riders. In part, this may reflect the perceived absence or inadequacy of these benefits for riders compared to those in other sectors – in other words, benefits may be less of an issue for those outside the gig economy because they are more comfortable with their existing provision. The gap is greatest for sick pay, which seems to be a particularly salient issue. Indeed, as discussed below, Deliveroo has recently extended its rider insurance to cover illness.

**Figure 24: Proportion of respondents saying that the benefit in question is ‘very important’ to them**



Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinion General Workforce & Wider Gig Economy Surveys July 2021

However, these responses should be read in the context of Figure 15, which showed that occupational benefits tend to be a lower priority than other considerations – particularly earnings and flexibility – for Deliveroo riders. That is significant because – as noted above – attempts by platforms to offer such benefits may well come with costs to their users, perhaps putting their self-employed status in jeopardy or reducing payment rates. Focus group participants were alive to such considerations, recognising that self-employment involves trade-offs, and most did not expect much in the way of occupational benefits given their decision. There was strong resistance to the idea of becoming employees, losing flexibility or pay in order to secure such benefits:

*“Being self-employed is a choice. You know the difference between self-employed and employed and basic pay, pension, all sorts, that is what your employer provides. When it comes to that, that is not a problem I have because I made the choice to be self-employed.”*

*“I think that, being self-employed, you expect that you’re not going to get holiday or sick pay. I put money away for that. So to have less flexibility in order to have holiday or sick pay, I don’t think I’d want that.”*

*“In terms of the perks, no one cares about perks. We would rather have the money instead.”*

*“It’s not about rights, it’s about how you pay your riders.”*

*“I’m happy not to have benefits such as holiday pay, but I want decent pay.”*

Although most riders do not expect traditional benefits such as sick pay or parental leave there was a feeling among focus group attendees that more could be done to support them. Deliveroo riders are already covered by insurance for accidents, and this insurance has recently (after the period in which the survey and focus groups were completed) been extended to cover sickness and parenthood (see box below). They

are also offered certain rider perks, including free hot drinks and discounts on things like vehicle accessories and money management tools.<sup>xxxvi</sup>

Yet many riders seemed to be unaware of many of these entitlements, asking for Deliveroo to provide things that it already does. In other cases, it may be that they would like these perks to be more generous. For example, there were calls for help with vehicle or bicycle insurance or discounts on fuel.

*“I would go for flexibility, but with added perks such as cheaper insurance, roadside maintenance, education, gyms – things that would assist us.”*

*“I think there are trade-offs, and it is difficult to have everything. But Deliveroo should have better support. And how would they support me if I broke my leg after being run over in the course of duty?”*

### Deliveroo insurance

Deliveroo riders have for since 2018 been covered by insurance in case of a range of eventualities:

- **Rider accident insurance:** Provides riders that are injured while working with a lump sum payment and/or ongoing payments for the period they are unable to work. It also covers legal expenses, counselling and advice. However, vehicles and other forms of kit are not covered by this insurance

In September 2021, Deliveroo told its riders that insurance would be extended in two ways:

- **Illness protection:** Riders that have completed 30 orders in the last eight weeks will be able to claim £35 per day for up to 15 days in the case of a medically certified illness that lasts more than seven days.
- **Parental payment:** Riders that have completed 30 orders in the last eight weeks, or 60 orders within the past six months for pregnant women, will receive a £1000 lump sum payment on the birth of a child or in the case of adoption/surrogacy.

Some riders, though, were less accepting of the trade-off as it is commonly presented. For those that work longer hours – particularly those that feel they need to in order to make their living – the supposed benefits of flexibility are less apparent, and the absence of benefits is more keenly felt. The more hours a rider wants to work, the less discretion they effectively have over when to do those hours. Such riders are hit more by volatility of pay rates, since they have less scope to log off and try and again at a different time. For such riders, the lack of benefits like paid leave paradoxically served to limit their flexibility – for example, their ability to make family commitments or go on holiday.

*“If you want to make money you’re forced to work through all the peaks. So you’re either working every day, or you’ve got to work Friday, Saturday, Sunday, all day. That’s the only way you’re going to make any money, but you’re still not guaranteed a set income.”*

*“In traditional jobs we can schedule holidays, we can go and see friends and family. In this job, we have to stick with the job. Otherwise the account is blank.”*

*“If you want time off, you are on your own. It is hard for me. Especially during Christmas and holidays, you have to sacrifice your holiday to work for them, your precious time.”*

### Clarke's story

Clarke<sup>4</sup> used to be a banker, but due to health problems he was no longer able to work. Eventually, Clarke had to get a job to support his family, but he also had to look after his children during the day. He found that Deliveroo allowed him to do both, so he started riding with them in the evenings.

*“If I take a traditional job with holiday it is a problem with my kids. For me it is flexible, but I still have to work every day.”*

Deliveroo continues to provide a much-needed line of support for Clarke, but he is unhappy with the amount he earns and the fact that despite working hours equivalent to a full-time job he is unable to take time off.

*“Once a month I take one Sunday off. I’m forced to do this... I have no other option left. I work 6-10 hours a day.”*

Clarke says he has looked for similar forms of platform work elsewhere, but has concluded that none offer the flexibility that he needs in order to look after his children. For him, riding with Deliveroo has both favourable and unfavourable consequences: he feels he works hard with little respite, but it provides an option that no one else will.

*“[Other sources of work] have good bonuses and pay... but I couldn’t join them because I have to work part-time. I cannot work when they want me to work. I have no other option.”*

In light of these issues, there was considerable, spontaneous attraction to a ‘two-tier’ or ‘opt-in’ system for occupational benefits. Focus group participants felt that some riders may want, or even need, additional benefits, particularly ‘high commitment’ riders who commit a significant amount of their time to Deliveroo. This was typically presented as an option for *other people* (it is worth noting that a number of focus group participants expressed concern about the impact of the Deliveroo business model on other riders), but not something most riders wanted to exercise *themselves*. In their own case, most of the riders we spoke to put flexibility above all else:

*“It is a discussion that needs to be had. Do you want the self-employment, to be able to work when you want and to be your own boss, or do you want to give some of that away [for more security]? There needs to be a middle ground.”*

*“I think there should be two different types of contracts: one for people who work all the time, full-time, and one for casual workers. People who work full time should have the basics, like holiday pay or for when you get injured.”*

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<sup>4</sup> Not his real name

*“It’s always good to have choice. For me I’m happy, but not everyone has options, and for those reliant on Deliveroo of course it will be beneficial.”*

For understandable reasons, focus group participants did not spell out the precise benefits, nor the legal status, of the different options that are on offer. All they suggested, in the broadest terms, was that some riders should be able to give up some of their flexibility for some increase in their benefits and protections. In practice, though, there is a substantial legal difference between two ways that platforms like Deliveroo might go about offering this. On the one hand, all riders might remain self-employed with some self-employed riders becoming eligible for additional benefits (for example, due to hours worked or length of time on the platform). On the other hand, the proposal could be for some riders opting into legal employee or worker status while others remain self-employed. Deliveroo have advised us that either approach would be legally complicated, and would likely require changes to the law, but that the second option (having both employed and self-employed people doing the same work simultaneously) is less likely to be tenable.

Assessing the legal merits of the two models sketched out above is beyond the scope of this report. Given the complexity of these issues, and the imprecision of participants views on what specific options they would like to be offered, we suggest that further research is needed before firm policy recommendations can be made, either to platforms or policymakers.

## **Respect**

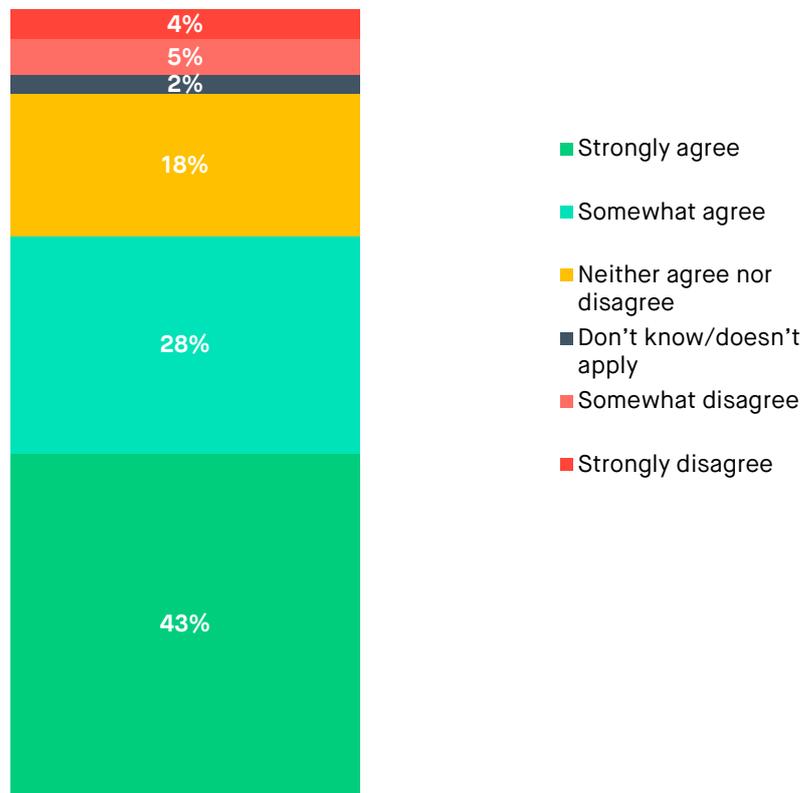
Another theme that emerged from the research was respect, or a lack thereof. Figure 25 shows that 71% of current riders say they are proud to ride for Deliveroo, and some expressed a sense of duty and belonging in the focus groups. In particular, there was a sense of fulfilment and contribution from the role they played during the coronavirus lockdowns, delivering food to those stuck in their houses.

*“I do feel proud, I wear my jacket wherever I go. If I ride with my uniform, people appreciate you for delivering.”*

*“In my area there’s a sense of community among riders, there are places where people meet, you get to meet people, it can be fun socially.”*

*“Lockdown was a good opportunity to help some people when they couldn’t get outside the house or if they were scared to. I thought Deliveroo was a good opportunity to give something to somebody.”*

**Figure 25: “How far do you agree with the following statement: ‘I feel proud to ride with Deliveroo’”?**



Source: SMF Deliveroo Current Riders Survey July 2021

Despite their perceived loyalty and contribution to the platform, though, some participants said they felt they do not get the respect they deserve; from customers, restaurant staff, or Deliveroo itself.

*“This job is becoming less respectful from both sides. Customers don’t respect us... the industry has become selfish.”*

*“Everybody attaches a stigma to riders, if you have the Deliveroo kit on you’ll immediately draw a bit of flak.”*

### Jackson's story

Jackson<sup>5</sup> is a university student. He works on evenings and weekends to boost his earnings and the flexibility of the job means it fits around his academic and social schedules.

Because of its convenience, Jackson enjoys riding with Deliveroo. But he also feels that it has considerable drawbacks in terms of pay and protections. Jackson accepts there will also be trade-offs in gig work, but he is unhappy with the status quo:

*“Why should we have to sacrifice things like rights, things like good pay, things like protections, just for the flexibility that we want? Although I enjoy the job, it’s a little disappointing to see that’s the price we have to pay.”*

In particular, Jackson spoke about the lack of respect he felt as a Deliveroo rider. For him, the pay is often not worth his time on the road, and he believes the transient nature of gig work results in riders being treated as if they are expendable. This is especially true when being made to wait for long periods in order to pick up an order.

*“They [Deliveroo] treat you as disposable. If you don’t like it, they will have you replaced, you don’t mean that much.”*

Because of this perceived disrespect, Jackson believes he is unlikely to ride with Deliveroo in the long-term. He thinks this will ultimately harm the company, as they will lose their most experienced riders:

*“I would like to keep my relationships with Deliveroo, but it needs to be changed so it’s worth the time. Otherwise, they won’t keep their experienced riders.”*

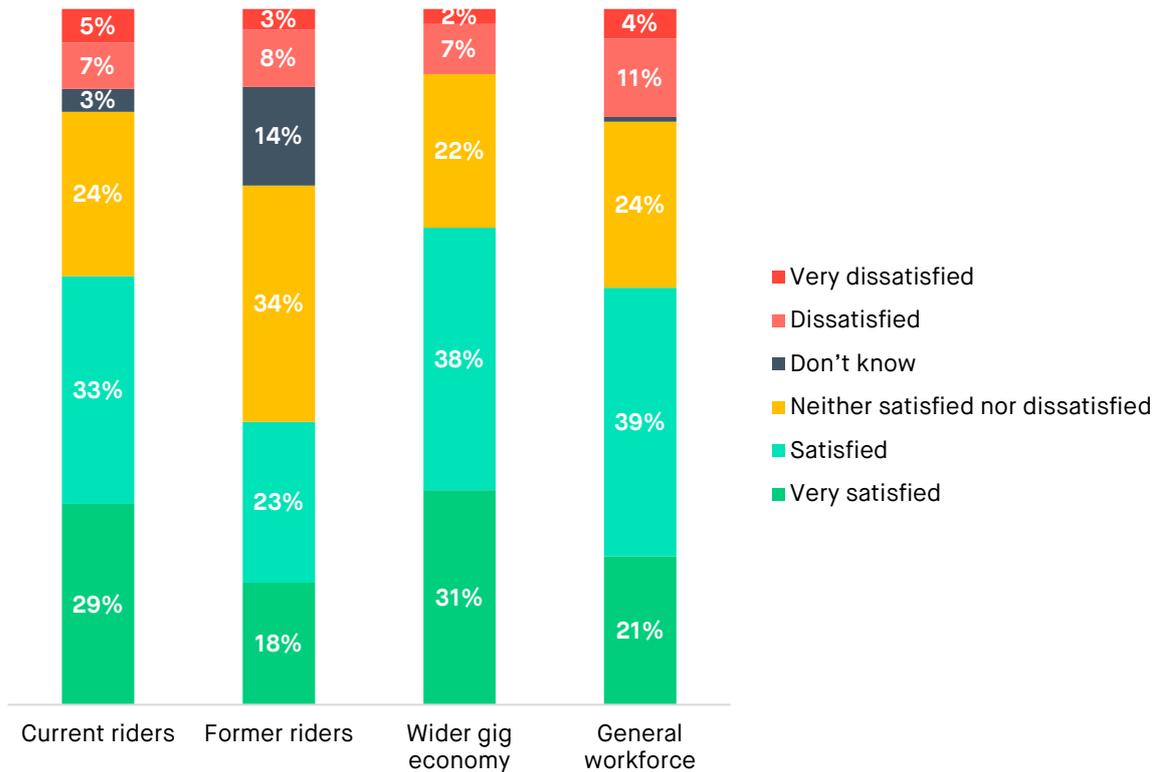
### Progression, skill development, and future prospects

As Figure 25 shows, current Deliveroo riders for the most part say they are satisfied with their ability to develop their skills in their work. Indeed, the proportion expressing satisfaction – 62% – is in line with workers in the rest of the economy. This is quite a striking finding, given that as we have seen the work is casual and short-term for many riders.

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<sup>5</sup> Not his real name

**Figure 26: “How satisfied are you with the opportunity to develop your skills in your job?”**



Source: SMF Deliveroo Current & Former Riders Surveys; SMF Opinium General Workforce & Wider Gig Economy Surveys July 2021

However, it also shows that 12% of current riders are dissatisfied, and a further quarter or so ambivalent. In the focus groups, several participants expressed the view that Deliveroo could do more to include them in its growth and development and to support them in achieving their ambitions:

*“Deliveroo has potential to grow in this economy, it has a future in this economy. Deliveroo should offer people a future. If you work hard, you get offered something better.”*

*“We are loyal to Deliveroo, we want to work with it and we want to develop the company, and it is a public company now. We want to be a part of this company and to get the benefits out of it.”*

*“Riders should know about openings [in head office(s)]. We should be made aware of vacancies first.”*

Deliveroo does have a number of resources to help its riders develop their skills and improve their future prospects. In particular, it maintains a ‘Rider Academy’ website, offering free online courses, advice on launching businesses, scholarships, apprenticeships and financial tips.<sup>xxxvii</sup> However, awareness of these benefits was low in our focus groups, suggesting there may be work to be done to better inform riders of the ways in which Deliveroo can support them.

Despite the fact, as we have seen, that a substantial number of riders expect to remain working on the platform for several years to come, few focus group participants described it as a good long-term option. It was more common to hear it portrayed as a fallback that they may keep returning to. Again, this highlights the value of its accessibility and flexibility, though it does raise questions about the consequences of remaining with Deliveroo in the long term.

*“It’s good having it there if you need quick income, you can do a few jobs and withdraw the money without having to wait until the end of the month. That instant-ness really helps. I’ll be holding onto it and most likely utilising it. Not as a full time job, but as a luxury.”*

*“Deliveroo is currently a long-term thing [because of] flexibility, the earning package, but I do have other plans. Deliveroo helps me to achieve what those other plans are. It supports me. I will probably stay for another 5 or 6 years, until the next step.”*

In a broader sense, some of the comments made by Deliveroo riders reflected some fear and uncertainty about the future, and some unwillingness to look too far ahead and confront what may lie in wait there:

*“I do worry about what the long-term impacts will be. I am genuinely worried about health issues - back pain, having a bad crash. There are lots of question marks.”*

*“if you compare to a standard 9-5 minimum wage job, in the long term that job would be better, but in the short term Deliveroo can be a lot better.”*

*“I take it day-by-day, but long-term? No.”*

This is consistent with government-commissioned research on the experiences of people doing gig work, which described a “vague anxiety” about pensions, as well as “uncertainty and unease” regarding their lack of savings.<sup>xxxviii</sup>

We have presented a lot of evidence that Deliveroo riders are aware of the costs and benefits of working in the gig economy, and make their decision carefully and deliberately. Moreover, people working in the gig economy are hardly the only people to worry about the future or to prioritise the near-term. At the same time, given that part of the trade-off involved in self-employment is some loss of security, such concerns are important to monitor and reflect upon.

## CHAPTER SIX – CONCLUSIONS AND IMPLICATIONS

The findings we have presented in this report should be clear enough to suggest that most riders find riding with Deliveroo to be a good source of work, and that on most metrics their level of satisfaction is comparable – if not superior – to the alternative jobs elsewhere in the economy. In particular, Deliveroo riders value the flexibility and autonomy that comes with the work. The vast majority of riders do not feel forced to work on the platform, nor do they feel that they lack alternative options. Rather, the decision to work on the app is, in most cases, taken consciously with an awareness of the trade-offs involved.

One lesson we draw from this is that debate among policymakers and politicians about this labour market should recognise Deliveroo riders and others in the gig economy as normal economic actors who are actively making choices around how, when, and where to work. They are economic actors like other workers. No doubt policy can ensure better outcomes in this market, as it can for almost all other markets. But any discussion of that policy should proceed from the acceptance that riders and gig workers have agency, and are not victims.

Given the advantages Deliveroo riders and others like them perceive from the current model, the premium they place on flexibility and their clearly stated desire not to be employees, anyone seeking to regulate the market should proceed cautiously and with regard to the evidence of this report about riders' contentment and choices. While nobody would say gig work is perfect, the discussions and responses we have had with riders is that they feel they have a lot to lose. Efforts to improve their lot should be made with full awareness of the risk of unintended consequences that could fundamentally undermine a model of work that has given rise to the flexible working that they evidently prize.

The overwhelming majority of people who work do so at least in part in order to get money. Given that simple economic fact, and the evidence that in several regards, Deliveroo riders have a great deal in common with other workers, it is probably not surprising that the leading motivation for Deliveroo riders in choosing their work is the opportunity to increase their earnings. A substantial majority say that they are satisfied with their pay, and Deliveroo riders are as content with the amount of money they make as workers elsewhere in the economy. Furthermore, the fact that they continue to opt to work on the platform is a form of evidence that they find the remuneration acceptable.

At the same time, earnings are the leading source of dissatisfaction among those that have complaints. There is a widespread perception, though this does not accord with Deliveroo's internal data, that payment rates have fallen. We found little to suggest that Deliveroo riders regularly and consistently earn below the minimum wage, as some reports have suggested.<sup>xxxix</sup> While we found little appetite from riders to be paid a flat hourly wage, some riders were clearly concerned about the possibility that they might be earning less than minimum wage, and suggested that it does happen on occasion. Fundamentally, we see this as an issue of trust and transparency. Deliveroo insist that riders are always paid above minimum wage *for time on delivery*, if not always for all the time they spend logged on the app. Internal data shared with us suggests that average

earnings are comfortably above the minimum wage (currently £8.91 per hour for those over 22). However, this may not be sufficient to satisfy the public or indeed the riders.

One way to build confidence that riders are being paid fairly would be to adopt a recommendation from the Taylor review to require platforms to share their pay data with an independent body (which need not be a statutory body<sup>6</sup>) so as to demonstrate that “an average individual, working averagely hard, successfully clears the National Minimum Wage with a 20% margin of error”.<sup>xi</sup>

Carrying out such calculations in practice is likely to be more complex than it sounds, requiring judgements on what “working averagely hard” means. Particularly significant, as we have seen, is the question of what the appropriate denominator is for calculating average earnings – time spent actively working or time spent on the platform, including time spent looking for work. Both are relevant. The specification that we are interested in “average individuals, working averagely hard” is critical because it means the measure should not be distorted by people logging on at inappropriate times or refusing too many jobs. However, care must be taken to ensure that the measure is interpreted in light of any shifts in rider behaviour that may significantly move the position of the average rider – such as, for example, a significant increase in multi-apping. Alternatively, an option might be to exclude time spent on the app from the calculated earnings rate if a rider rejects a certain number of consecutive orders, or logs on at particular hours of especially low demand. Given the complexities of the issue, we do not recommend too much weight is put on a single measure, but that metrics are tracked over time and significant changes investigated in more depth by an independent third party

We do not expect such checks should fundamentally alter business models or pay scales, but they could offer important reassurance to the riders in question, policymakers and the wider public. Ideally, platforms would be more transparent and share more information publicly regarding the earnings of those that work on them. However, as we have seen in this project, publishing such data may be legally problematic or risk putting them at a competitive disadvantage, so such efforts at transparency may have to be coordinated.

More broadly, while we have found that riding with Deliveroo seems to work well for most riders in most respects, we see two major potential challenges on the horizon. The first is the significant and growing minority that rely heavily on platforms like Deliveroo for their incomes, and who are likely to stick with gig work for several years to come. In many ways, this is a positive sign – an indicator of the success of firms like Deliveroo in creating attractive roles for people that they want to continue in. However, it is in important ways a departure from how the gig economy has often been conceived. For those with a high level of commitment to and reliance on platforms like Deliveroo, rather than seeing it as a temporary or supplementary source of income, it

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<sup>6</sup> For an example of a non-statutory model, consider the FTSE Women Leaders Review, which is an independent business-led voluntary framework supported by government to collect and publish data on women in boards and leadership roles: <https://ftsewomenleaders.com/about-us/>

is reasonable to ask whether a different set of obligations and responsibilities (on the part of the person doing the work, the platform and the state) arise.

Second, there is reason for concern that some people working in gig economy may be too short-termist in their outlook, and may be making inadequate provision for their futures. This group makes up only a minority of riders, so the issue should not be overstated. But nor should it be ignored, since they could become more numerous over time. This possibility manifests in different ways: doing too little to protect and insure themselves against accident and illness, thinking too little about their long-term career development, saving too little for their pensions. We admit that this thought is somewhat paternalistic, and our findings suggest we should be very careful in making assumptions that people working in gig economy do not understand the trade-offs they are making. However, we found a certain reluctance in some riders to think too much about the future and confront the worrying prospects that lie there. Moreover, it is important to emphasise that we do not need to single out those in the gig economy in expressing such concerns: the failure to give enough consideration to the future is a widespread phenomenon, which is why policies like pension auto-enrolment have been implemented across the employed labour force. What it means, though, is that we should recognise that people doing gig work are not always and everywhere acting in their best interests, even if the model seems to work for the majority.

In this context, it is encouraging to see a healthy divergence in business models across delivery platforms, and hopefully in the wider gig economy too. Apps such as Getir are offering those that want it employee status on full or part-time hours at a fixed wage, allowing them to trade flexibility for a bit more certainty.<sup>xii</sup> Just Eat has a hybrid model, with some employees on contracts with hourly pay, pensions, sick pay and holiday pay, whereas others remaining self-employed.<sup>xiii</sup> Those options will allow people to ‘vote with their feet’, choosing the option that best fits their needs as they see them.

At the same time, all platforms should – as Deliveroo does through its insurance protections and rider perks and resources – recognise the social responsibilities that they have to the people who work on them, beyond just complying with the legal minimum. Deliveroo, like all companies, should continue to give due regard to the impact of their actions on all stakeholders – including the people that use their platform – rather than merely seeking to maximise profits.<sup>xiii</sup> This observation should not be taken as specific to Deliveroo; it is the SMF’s view of all companies and their obligations to uphold the social contract between business and wider society.

The evidence we have gathered in this report shows that on many measures, Deliveroo riders are at least as happy as those elsewhere in the workforce, a level of satisfaction that has been recorded under the existing policy framework around the gig economy. This calls to mind the words of the Taylor review: “The best way to achieve better work is not national regulation but responsible corporate governance, good management and strong employment relations within the organisation” (though obviously the same principle can be applied to non-employee platform users).<sup>xiv</sup> In the case of organisations like Deliveroo, this should involve sustaining current efforts to recognise and respond to the needs of riders that have shown substantial commitment to the platform – either by working on it for a longer period, or more intensively in terms

of hours per week. Insofar as legal obstacles prevent platforms from offering benefits that their riders want without jeopardising their self-employed status, such laws and regulations should be reviewed.

For that reason, it is critical that Deliveroo maintains the insurance it offers riders in terms of protection against accident and injury. It is very promising that Deliveroo has enhanced its support for riders that fall ill or become parents (see page 48 above). As well as offering more generous benefits, platforms like Deliveroo might consider higher rates of pay or special bonuses for ‘higher commitment’ riders.

Initiatives to recognise the needs and dedication of higher commitment riders should not just be limited to improving their material terms and conditions. They should also aim to make them feel more respected, valued, and included. This could include offering more forums for engagement – it was notable how many of our focus group participants said they had never felt consulted before. It could also involve more ‘personalised’ relationships – for example, a named liaison manager for each senior rider. As noted above, Deliveroo already offers a range of career and skill development support to riders through its Rider Academy website, though given the low awareness of such schemes we found, it could perhaps better publicise them. Moreover, it could reaffirm its commitment to and investment in more senior riders by offering greater career guidance and support, or more help with financial planning and the like.

However, making those in the gig economy feel dignified and respected in their work is not just a task for platforms. There is need for wider societal discussion of the way they are perceived, discussed, and sometimes treated. The riders we spoke to raised particular complaints about the way they were made to feel by restaurants<sup>7</sup>, but also had issues with rudeness and unpleasantness from other people on the roads and customers. Addressing those issues would go a significant way to making the work more pleasant on a day-to-day basis.

Finally, there is a critical role for the government as well to protect people doing gig work and make it easier for them to do their work and make their living. The pandemic has highlighted the failings of the sick pay system, especially for the self-employed, and there could be benefit from a greater government contribution to help those who fall ill or get injured. Under-saving among self-employed people is a long-running issue, and the government could pursue options like auto-enrolment into pensions as part of the tax system for the self-employed<sup>xlv</sup> or ‘sidecar’ pension that split savings between a pension and a ‘rainy day fund’ for emergencies.<sup>xlvi</sup>

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<sup>7</sup> Deliveroo does have community guidelines for restaurants in terms of how to treat their riders – it would help if restaurants did more to abide by these (and possibly if riders more frequently reported breaches): <https://help.deliveroo.com/en/articles/4057576-our-community-guidelines-for-restaurants>

## ENDNOTES

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- <sup>i</sup> Department for Business, Energy & Industrial Strategy (2018), The characteristics of those in the gig economy
- <sup>ii</sup> Ibid.
- <sup>iii</sup> Statistical Services and Consultancy Unit, University of Hertfordshire (2019), Platform Work in the UK 2016-2019.
- <sup>iv</sup> House of Lords Library Briefing (2018), Gig Economy: Legal Status of Gig Economy Workers and Working Practices.
- <sup>v</sup> <https://www.wired.co.uk/article/uber-loses-gig-economy-case>
- <sup>vi</sup> <https://www.lewissilkin.com/en/insights/court-of-appeal-rejects-challenge-to-deliveroo-riders-selfemployed-status>
- <sup>vii</sup> <https://parissmith.co.uk/blog/the-gig-economy-why-are-uber-drivers-workers-and-deliveroo-riders-not/>
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- <sup>ix</sup> <https://www.lewissilkin.com/en/insights/court-of-appeal-rejects-challenge-to-deliveroo-riders-selfemployed-status>
- <sup>x</sup> Department for Business, Energy & Industrial Strategy (2017), *Good work: the Taylor review of modern working practices*.
- <sup>xi</sup> <https://commonslibrary.parliament.uk/employment-law-in-the-modern-economy-the-good-work-plan/>
- <sup>xii</sup> <https://www.independent.co.uk/business/labour-pledge-to-give-gig-economy-workers-right-to-sick-pay-b1891077.html>; <https://labour.org.uk/issues/campaigns/a-new-deal-for-working-people/>
- <sup>xiii</sup> [https://english.elpais.com/economy\\_and\\_business/2020-09-24/spanish-supreme-court-rules-food-delivery-riders-are-employees.html](https://english.elpais.com/economy_and_business/2020-09-24/spanish-supreme-court-rules-food-delivery-riders-are-employees.html)
- <sup>xiv</sup> <https://www.ft.com/content/6bf8ea68-d035-4cc0-a367-a545c2814355>
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- <sup>xvi</sup> <https://www.france24.com/en/20190111-french-court-backs-uber-driver-key-gig-economy-case>
- <sup>xvii</sup> <https://www.reuters.com/article/us-uber-britain-breakingviews-idINKBN2AJ214>
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- <sup>xx</sup> <https://techcrunch.com/2021/08/24/a-california-judge-just-struck-down-prop-22-now-what/>
- <sup>xxi</sup> <https://www.reuters.com/business/sustainable-business/gig-economy-riders-spain-must-become-staff-within-90-days-under-new-rule-2021-05-11/>
- <sup>xxii</sup> <https://abcnews.go.com/International/wireStory/clarification-spain-delivery-riders-story-76325111>

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- <sup>xxiii</sup> <https://www.theguardian.com/business/2021/jul/30/deliveroo-unveils-plans-to-pull-out-of-spain-in-wake-of-rider-law>; <https://www.ft.com/content/8f2292bb-1ccc-47f2-ad8a-6b5cd659a647>
- <sup>xxiv</sup> <https://www.standard.co.uk/business/as-deliveroo-falls-again-2000-just-eat-riders-move-to-full-employee-status-gig-economy-b927515.html>
- <sup>xxv</sup> <https://www.bloomberg.com/news/articles/2021-08-13/gig-economy-crackdowns-are-off-to-a-bad-start-in-spain>
- <sup>xxvi</sup> BEIS, *The characteristics of those in the gig economy*.
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- <sup>xxxv</sup> <https://ir.design-portfolio.co.uk/viewer/28/21584>
- <sup>xxxvi</sup> <https://riders.deliveroo.co.uk/en/perks>
- <sup>xxxvii</sup> <https://www.deliveroorideracademy.co.uk/>
- <sup>xxxviii</sup> BEIS, *The characteristics of those in the gig economy*.
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- <sup>xl</sup> BEIS, *Good work*.
- <sup>xli</sup> <https://www.ft.com/content/bdb43495-fadf-4217-bc33-bc52e6f0fdd4>
- <sup>xlii</sup> <https://www.standard.co.uk/business/as-deliveroo-falls-again-2000-just-eat-riders-move-to-full-employee-status-gig-economy-b927515.html>
- <sup>xliii</sup> <https://www.thetimes.co.uk/article/it-s-time-for-social-responsibility-to-replace-supremacy-of-shareholders-qhsfxdb82>
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- <sup>xlv</sup> <https://www.aviva.com/newsroom/news-releases/2017/07/uk-a-blueprint-for-getting-the-self-employed-into-pensions-17789/>
- <sup>xlvi</sup> The Association of Independent Professionals and the Self-Employed (2018), *How to solve the self-employed pensions crisis*.