



Research on parcel delivery driver pay and employment conditions

Report prepared for Citizens Advice



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1. Executive summary

1.1 Introduction

As statutory consumer advocate for post, Citizens Advice has an obligation to protect the interests of consumers of this essential service and part of this includes monitoring the quality of provision from the parcels market. The primary aim of this research was to gain insight into payment models and working conditions for self-employed parcel delivery drivers and demonstrate whether and how the evidence suggests they lead to consumer detriment. The secondary objective was to understand drivers' experience of if and how these payment models and employment conditions create pressure on them, and are perceived to affect the quality of their delivery.

This research, which took place between May and July 2026, engaged with a total of 50 self-employed drivers who deliver directly to end customers (final mile deliveries). There were two stages of the research: a short quantitative survey to collect data on respondents' pay and conditions, followed by a qualitative interview to enable the data provided to be validated and drivers' pay and conditions to be explored in more detail. The sample represented self-employed drivers from a range of locations across England and Wales who work for a range of parcel firms which are broadly representative of the market share for firms with predominantly self-employed workforces, as well as some who work for third party intermediaries contracted to one or more parcel firms.

In terms of interpreting the findings that follow, it is important to note that they are based on self-reported data from delivery drivers, although where possible this has been validated by evidence provided on their earnings and in discussion in the qualitative interview. The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so averaging or selecting of the midpoint was required in some instances.

1.2 Key findings

1.2.1 Evidence on pay and conditions of parcel delivery drivers

Of the 50 delivery drivers that took part in this research, most report being paid either a per parcel rate (56%) or a set amount for a specific block of time (33%), with the remainder (12%) receiving other types of payments, most commonly a daily rate. As such, per parcel and per block can be regarded as representing the two main payment models for the self-employed parcel delivery workforce in England and Wales. The majority of respondents (83%) do not receive any benefits such as sick or holiday pay but a few (17%) reported having 'self-employed plus' contracts which include some access to sick and holiday pay in return for a lower fee.

Half of respondents work part-time (less than 35 hours per week) and the remainder (50%) work full-time (35 hours or more). The average¹ number of hours worked per week by full-time drivers in

¹ Throughout this report the word 'average' refers to a calculated mean. Where referring to a median, this will be specified.

this research is significantly higher than 35 hours, with an average reported of 47 hours and almost half (48% of those working full-time) working 48 hours or more per week.

Based on respondents' individual reports, the average gross pay before any unpaid working hours for those who took part in this research is £15.26 per hour, and the range of gross hourly pay is between £6.92 and £24.62. This wide range reflects rate differences not just between but also within individual companies.

Based on respondents' self-reported volume targets, they are expected to deliver 19 parcels per hour on average, a volume target which would require a maximum of 3 minutes 9 seconds to be spent on each delivery including travel time between drop off locations, finding the correct parcel, ringing and waiting at the door, etc. However, targets varied considerably across the sample, based on drivers' feedback, from 4 to 50 parcels per hour.

More than a quarter of respondents (28%) state that they regularly work unpaid hours, with average unpaid time amounting to 2 hours 42 minutes per week. Even those being paid by parcel feel they work unpaid hours as they perceive that their per parcel rate does not build in allowance for loading, returns or any delays. When self-reported unpaid working hours are taken into account, average gross pay reduces to £14.93 per hour.

Running costs of respondents are reportedly substantial, amounting to an average £146.14 per week and absorbing around one-third (31%) of drivers' gross earnings on average. These reported costs may be an underestimation of some vehicle-related expenses as well as other costs (such as traffic and parking fines, use of personal devices etc.) as most do not regularly record or tally these costs up. Most drivers (85%) do not receive any extra compensation from parcel delivery companies towards their expenses.

After reported running costs are deducted from their gross earnings, average pay for this research sample is calculated to be £10.36 per hour and median pay £10.91 per hour, both below the National Minimum Wage (NMW) of £12.71². Based on these pay rates, only one quarter (25%) of this research sample receive the NMW equivalent for the hours they work. This reduces further (to only 5 respondents) if an estimate of the value of employee benefits (for sick and holiday pay, and employer's pension contribution) is added to the NMW³.

1.2.2 Driver perceptions of their pay and working conditions

Drivers often do not know in advance how much they will earn, especially on a per hour basis, as it can depend on unknowns such as the number and in some cases size of parcel, the timeslot they are working and the route they are given. They are even less likely to be aware of their hourly earnings after their running costs and unpaid time have been accounted for. This is because drivers did not

² This comparison looks at pay before tax deductions, and does not factor in the impact of bonuses or penalties, given the conditional and ad hoc basis on which these are levied.

³ This research evaluates pre-tax pay and does not model the tax differences between self-employed drivers and employees earning the National Minimum Wage (NMW).

routinely calculate their pay against running costs or unpaid time. Instead, they tended to view their earnings in terms of gross payouts.

However, more drivers are dissatisfied than satisfied with their pay (46% vs. 34%), with many feeling that their earnings do not reflect the demands of the role. Longer-serving drivers report that pay rates have reduced over time while parcel volumes and targets have increased.

Flexibility is one of the main attractions of parcel delivery work but the downside of this for many is unpredictable schedules and insecure earnings. Conversely, some drivers feel they have limited autonomy despite being self-employed, particularly where regular routes, performance monitoring and shift allocation practices restrict their flexibility.

While none quantified how much they would need to earn to compensate for the benefits of being employed (e.g. sick pay, holiday pay, employer pension contribution), a number would prefer to be employed to achieve better job and pay security as well as the additional benefits afforded.

1.2.3 How pay and conditions create pressure on drivers

The great majority of respondents report feeling pressured at work (84% agree and 38% agree strongly). Pressure is driven primarily by the need to deliver high parcel volumes within tight timescales in order to achieve sufficient earnings.

Payment models reward successful and rapid completion of deliveries but are not felt to compensate drivers for loading time, travel, delays or waiting time. Drivers consequently experience pressure to work at speed to maximise their earnings by minimising the time they need to complete their allocated deliveries. Drivers may also receive penalties (fines or fewer/less attractive shifts) for not meeting the expectations of the companies they work for.

Drivers report regularly skipping breaks, rushing between deliveries and working through illness or injury because of the pressure of the job. Some drivers also experience additional pressure from uncertainty over future shifts and income, while those with regular routes fear losing them if expectations are not met.

1.2.4 How driver pressure affects quality of delivery

Three-quarters of respondents (76%) agree that pressure to deliver quickly makes it difficult to provide good customer service. In particular, drivers report that pressure to complete routes increases the likelihood of parcels being left on doorsteps before someone has come to the door or left in locations that may not be secure.

Time pressures also reportedly make it harder to provide additional assistance to disabled customers or others who need longer to answer the door. Drivers also describe having little opportunity to engage with customers, resolve delivery issues or provide a more personalised service. In addition, the pressure of the job is perceived to increase the risk of delivery mistakes, parcel damage, delayed deliveries and other avoidable service failures.

Drivers consistently suggest better pay, lower delivery volumes and more realistic targets as being the most effective ways to improve service quality.

1.3 Summary conclusions

The research suggests that many self-employed parcel delivery drivers may earn below the National Minimum Wage equivalent once their running costs and unpaid working time are taken into account⁴.

Current payment models prioritise delivery speed and volume, creating strong incentives for drivers to maximise efficiency rather than the customer experience. As such, consumer outcomes and driver pay and conditions appear to be closely linked, with delivery pressures undermining the ability of drivers to provide service quality.

Parcel delivery companies are under no legal obligation to pay genuinely self-employed drivers at or above the National Minimum Wage, either before or after costs. However, how their pay compares to the NMW is an indication of how tight the margins can be for delivery drivers trying to earn a living and this raises questions about the impact this can have on consumer outcomes. Employees also have rights to other benefits with a financial value, such as sick pay and holiday pay, which few self-employed drivers do. In this research, a number of self-employed drivers reported that it is challenging to make ends meet given the current cost of living, and some worked multiple jobs in order to boost their earnings.

⁴ As mentioned above, this research evaluates pre-tax pay and does not model the tax differences between self-employed drivers and employees earning the National Minimum Wage (NMW).

2. Introduction

2.1 Context for the research

As statutory consumer advocate for post, Citizens Advice has a duty to protect the interests of consumers and part of this includes monitoring the parcels market to ensure it meets consumers' needs. Citizens Advice considers parcel delivery central to the retail experience, particularly given that parcel volumes have remained high since the pandemic.⁵ They also highlight its importance for disabled people, who often face additional barriers when shopping.⁶

There has been long-standing evidence of consumer dissatisfaction with parcel deliveries. For example, annual quantitative research conducted by Citizens Advice since 2022 has found that each year, at least one in three parcel consumers had a problem with their most recent parcel delivery, the main ones being parcels left in insecure locations, delivery drivers leaving before they had time to get to the door, and parcels arriving late.⁷ Previous research also demonstrated the impacts of these issues on consumers, leading to inconvenience, stress and sometimes also financial costs.⁸ In addition, Citizens Advice identified that disabled consumers can be particularly impacted by delivery problems such as not allowing them enough time to get to the door, parcels being left in inaccessible places, and not being able to tell the company about their specific needs.⁹ Furthermore, research from Citizens Advice in 2025 found that when consumers are asked about priorities and trade-offs between different aspects of parcels delivery, reliability came first above speed and price.¹⁰

Following a review of parcel market regulation in 2022, Ofcom introduced new regulation for parcel operators around improving quality of service for disabled consumers, as well as new guidance around complaints processes. However, Citizens Advice's ongoing monitoring of the parcel delivery sector has shown problems increasing rather than decreasing since this regulation was introduced.¹¹

Citizens Advice believes that the way employment practices in the sector currently operate may be contributing to the problems consumers are experiencing. Research previously commissioned by Citizens Advice found a connection between poor consumer outcomes and the current predominantly self-employed payment models in the parcel delivery sector. In particular, the fact that delivery drivers are expected to meet extremely high-volume targets under tight time constraints was shown to incentivise speed over delivery quality, leading to poor consumer outcomes.¹² There is also regular media coverage and anecdotal feedback on social media showing extreme pressure that parcel delivery drivers face and indicating how this can affect service quality.

⁵ The full package - What consumers need from a changing postal service 14042025

⁶ [Ensuring out-of- home delivery options benefit everyone](#)

⁷ [Parcels league table 2022 - Citizens Advice](#), [Parcels League Table 2023 - Citizens Advice](#), [Parcels League Table 2024 - Citizens Advice](#), [Citizens Advice \(Nov 2025\) Parcel League Table](#)

⁸ [The market which isn't delivering - Citizens Advice](#)

⁹ [Citizens Advice \(Dec 2019\) The missing link – Why parcel companies must deliver for disabled people](#)

¹⁰ [The full package - What consumers need from a changing postal service 14042025](#)

¹¹ [Citizens Advice \(Nov 2025\) Parcel League Table](#)

¹² [Citizens Advice \(Jul 2021\) Sorry we missed you - How high pressure on delivery drivers impacts consumer outcomes](#)

However, there remains an evidence gap on quantifying pay levels and working conditions across the parcel delivery sector. In particular, the pay and conditions of self-employed drivers are not openly available online.

Whether you are classified as an employee, worker, or self-employed under law determines which statutory rights you are entitled to. While employees are legally entitled to the National Minimum Wage, holiday and sick pay, and pension contributions, people who are genuinely self-employed are not entitled to these benefits. They are legally deemed to be their own boss and their pay and conditions are instead governed by the contracts they have with their clients. While there have been claims of bogus self-employment in this sector, this research was not designed to identify this. Instead, in this report, we use some of the statutory entitlements of employees, such as the National Minimum Wage, as an illustrative benchmark related to basic living standards to assess how pay and conditions of self-employed couriers compare.

2.2 Research objectives

The overall aim of this research was therefore to gain insights into conditions for self-employed delivery drivers, including evidence on pay, and to demonstrate if and how this leads to consumer detriment. Consequently, the primary objective was to provide data on payment models and how pay compares against the hourly National Minimum Wage. This comparison of drivers' pay to the NMW is used as a way of ascertaining how tight the margins can be for delivery drivers trying to earn a living but, in doing so, Citizens Advice acknowledges that parcel delivery companies are under no legal obligation to pay self-employed drivers the NMW equivalent. A secondary but still important objective was to collect driver feedback on if and how the payment model creates pressure on them and affects the quality of their delivery.

2.3 Methodology

This research needed to deliver a sufficient sample size to enable quantitative data as well as for qualitative insights to be derived on delivery drivers' pay and conditions. The sample also needed to be sufficiently diverse in order to enable comparison of different payment models and pay levels.

These requirements presented a number of challenges, including that:

- Self-employed parcel delivery drivers are a niche population group and harder to reach than other groups due to their participation in the gig economy.
- The working conditions and time pressures of delivery drivers mean that they are time poor which represents an additional barrier to them participating in research.
- The sensitivity of the topic, with drivers being required to divulge details of their pay and conditions, could potentially deter some people from being willing to participate in the research.

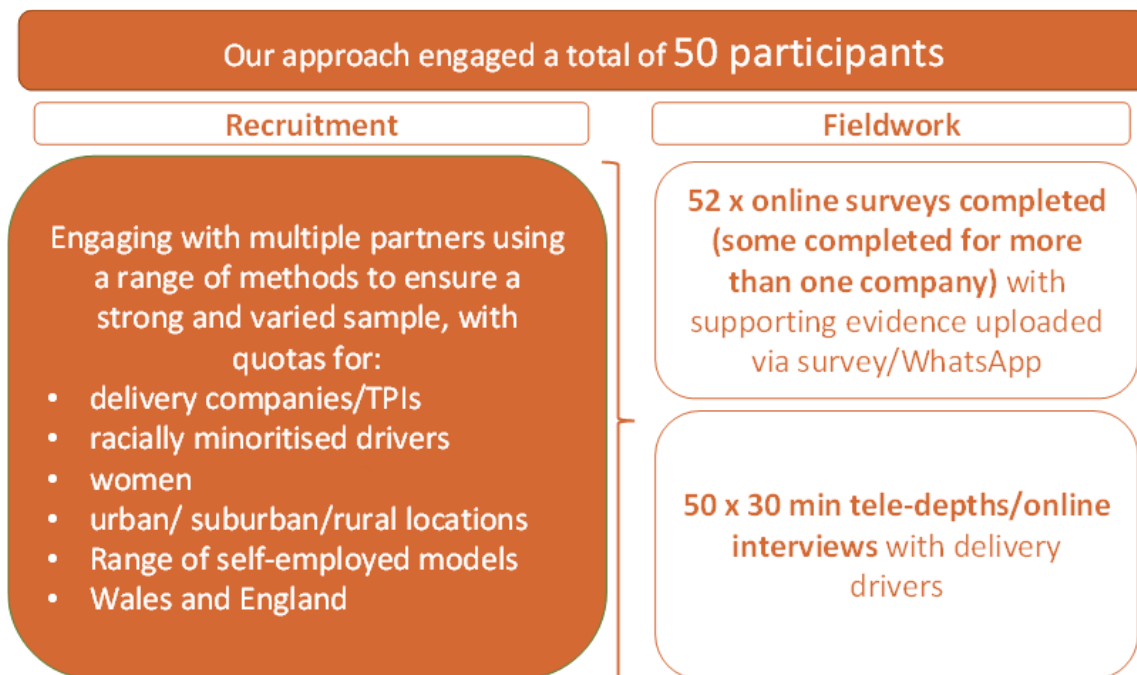
We designed our approach to manage these challenges and ensure the sample was as reflective as possible of drivers' experiences. In summary, our approach had the following key features:

- A sample size able to provide reliable quantitative data, (50 participants) with quotas to ensure representation of different cohorts of interest.

- Purposive qualitative recruitment to ensure that all the sample requirements and quotas were met. As the respondents agreed to a qualitative interview as well as an online survey, we were able to achieve greater engagement with the quantitative stage of the process, and therefore for more complete and accurate data to be provided.
- Working with multiple partners and using a variety of approaches in the recruitment (including databases and networks, snowballing, proactive outreach on social media groups) in order to maximise our chances of identifying eligible respondents.
- A two-stage research process commencing with a self-completion questionnaire to collect the quantitative data and supporting documentation on pay rates (e.g. invoices), followed by a qualitative interview to confirm the data provided in the survey and explore drivers' pay and conditions in more detail.
- Detailed consideration of how to make the research as accessible as possible by designing a short and simple to complete quantitative questionnaire, allowing respondents to select their preferred time and platform for the qualitative interviews, and limiting these interviews to 30 minutes in order to reduce the burden of participation.

Our approach is summarised below:

Chart 1: Approach to recruitment and fieldwork



Overall 31 drivers provided documentary evidence of their pay. Some who worked for more than one delivery company provided more than one type of proof, including:

- 16 examples of screenshots of completed shifts for those paid per block, recorded on phone apps, including shift timings and rate paid per shift
- 12 examples of remittance advices or invoices with detailed information about pay and deductions for e.g. van hire
- 4 examples of rate cards or pay per parcel

- 2 examples of self-recorded pay per day (e.g. on phone notes app)
- 2 examples of bank statements showing pay entering participant's account

The research sample was designed to be broadly representative of the self-employed parcel delivery workforce. It also included drivers who were hired and managed by third party intermediaries (TPI) . The inclusion of drivers working for TPIs reflects the fact that it is common for UK parcel delivery companies to subcontract part of their operations to TPIs who then hire and manage their own self-employed drivers to fulfill the contract requirements. All respondents were required to deliver to end customers (final mile deliveries).

Additionally, we aimed to include:

- Those located in Wales as well as England
- Those with routes in rural as well as urban and suburban locations
- Women as well as men
- Racially minoritised drivers
- Some receiving additional benefits ('self-employed plus') as well as those without any benefits

Chart 2 to follow represents the minimum quotas and achievement against them across each of these sample requirements:

Chart 2: Sample quotas and sample achieved

Sample requirements	Achieved
Delivery company	The sample included self- employed drivers working for a range of parcel delivery companies, broadly representative of overall market share for companies using predominantly self-employed workforces. It also included drivers hired and managed through third-party intermediaries
Employment structure	8 drivers who had additional benefits as part of their self-employed contracts (sick pay and holiday pay)
Gender	10 women
Location	8 mainly rural (but 23 with any rural driving) 19 mainly urban 23 mainly suburban [Over-adds as some worked across more than one route]
Racially minoritised workers	29 racially minoritised

Sample requirements	Achieved
Country	41 England (including London & South East, Midlands, South West, and North of England) 9 Wales

The research was undertaken from May to July 2026 by the senior team from Spark Insight led by Katie Pekacar and Monique Rotik. The questionnaire and interview guide used in this research are included in the Appendix to this report.

2.4 Report roadmap and interpretation guidance

This research draws together the main findings from the quantitative and qualitative stages of this research.

The detailed sections that follow in this report have been structured as follows:

3. Evidence on pay and conditions of parcel delivery companies
4. Driver perceptions of their pay and working conditions
5. How pay and conditions create pressure on drivers
6. How driver pressure affects quality of delivery

There is also a stand-alone executive summary that precedes this introduction, and a final section (Section 7) which sets out what the authors regard as the key conclusions and implications from this research.

In terms of interpreting the findings, the quantitative data should be treated as estimates rather than firm figures because:

- The sample was relatively small (n=50 individual respondents, n=52 survey responses as some respondents answered more than once to reflect their employment with multiple companies).
- Data was self-reported although efforts have been made to validate the accuracy through viewing invoice evidence and in the qualitative discussions.
- Data on pay, hours and costs were sometimes given in ranges in the survey responses rather than as fixed amounts because the amounts varied, meaning that averaging or selecting the midpoint was required in the calculations.
- In some cases, drivers had to estimate their costs as they did not always record these.

3. Evidence on pay and conditions of parcel delivery drivers

3.1 Payment models and rates

Of the 52 survey responses¹³ received, the most common payment structure is a per parcel rate (56% of responses)¹⁴ or being paid a set amount for a specific block of time (33%)¹⁵. As such, these can be regarded as representing the two main payment models of the largest UK parcel delivery companies with predominantly self-employed workforces. The remainder (12%)¹⁶ received other types of payments, most often a daily rate. The great majority of contract types (81% of responses)¹⁷ – do not receive any benefits such as sick or holiday pay, but a small number (19%)¹⁸ reported having 'self-employed plus' contracts.

Some of those who are paid per parcel receive a flat rate across all parcel sizes but most are paid different amounts depending on the size of the parcel. In addition, some companies calculate 'drops' or 'locations' rather than parcels, and drivers may only receive one payment for delivering multiple parcels in a given location in this case.

For those who are paid per block, their payment depends on the extent to which the block is popular with drivers (for popular blocks, lower pay would be on offer) and how close to the shift time the offer is taken up (if it is close to the commencement time then the pay on offer would increase). This means that those living close to the depot and/or with significant flexibility are better able to take advantage of higher rates. Relatively few are paid an hourly or day rate (12% of responses)¹⁹ and there is also some variation in rates of pay under this payment model.

The lowest and highest rates for each payment type are summarised in the chart below:

Chart 3: Minimum and maximum payments recorded by payment model

Payment per parcel	Lowest payment recorded	35p per parcel (for small or letterbox parcel)
	Highest payment recorded	£2.20 per parcel
Payment per block	Lowest payment recorded	£30 per 2-hour shift
	Highest payment recorded	£90 per 2-hour shift

¹³ Within this report data refers to either number of survey responses (N = 52) or number of unique participants (50) depending on the context. Where the individual has more than one contract type, payment model or rate of expenses vs pay the total number of survey responses (N = 52) is used, where the question refers to their attitudes and satisfaction, we have used unique respondents. The base size is indicated under each chart.

¹⁴ 29, (N = 52)

¹⁵ 18, (N = 52)

¹⁶ 6, (N = 52)

¹⁷ 42, (N = 52)

¹⁸ 10, (N = 52)

¹⁹ 6, (N = 52)

Payment per day	Lowest payment recorded	£112 per day
	Highest payment recorded	£190 per day

Base: All survey responses (n.52)

More detail on reasons for payment variations under each payment model is provided in the section that follows.

3.2 Mean, median and range of gross pay

Based on the reports of the 52 survey responses²⁰, the average gross hourly pay (i.e. pay before costs and unpaid working hours were deducted) of delivery drivers represented in this research is calculated to be £15.26 per hour. However, given the high degree of variability underlying this average (from £6.92 to £24.62 per hour), the median value may be more accurate in estimating the most common rate of hourly pay and this is lower, at £14.84 per hour.

Chart 4: Hourly pay of parcel delivery drivers before unpaid working hours and running costs²¹

Average (mean) gross hourly pay	£15.26 per hour
Median gross hourly pay	£14.84 per hour
Lowest gross hourly pay	£6.92 per hour
Highest gross hourly pay	£24.62 per hour
Average gross hourly pay if paid per parcel	£14.70 per hour
Average gross hourly pay if paid per block	£15.34 per hour
Average gross hourly pay if paid another way (usually per day)	£17.73 per hour
Average gross hourly pay if working for TPI	£15.69 per hour
Average gross hourly pay if working directly for delivery company	£15.03 per hour

Base: All survey responses (n.52)

The data shows that pay per hour has the greatest variability in terms of gross pay of all the payment models, accounting for both the lowest hourly pay (£6.92 per hour) and the highest (£24.62 per hour). When discussing this model, drivers emphasised the role of speed and experience in enabling

²⁰ These calculations are extrapolated from driver estimates of weekly or monthly earnings and working time and verified using the pay proof provided where possible. In qualitative interviews these figures were also validated. In 5 instances we used documentation on pay rates rather than survey responses as this was found to give a more accurate number. The challenges in identifying pay rates were mainly due to a fluctuation of hours making it difficult to estimate from weekly or monthly pay.

²¹ The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

them to earn a good hourly rate, with those able to work faster either because they had fewer miles to travel, because they were familiar with the route or because they were experienced drivers able to deliver more parcels in less time, while slower drivers found they struggled to make a good wage.

Both payment per block and other methods of payment had lower variability in gross pay (between £9.00 per hour and £21.00 per hour for payment per block and between £13.68 and £23.75 for other methods of payment). In these cases the opportunity to maximise pay is limited, but drivers also need to find the advertised payment rate proposed acceptable in order to take on the shift and this may have been a deterrent to extremely low gross pay rates.

Beyond these observable differences in rates by payment model, rate variability is evident not just between those working for different parcel delivery companies but also within individual companies. According to driver feedback, they may be paid differentially based on their route (with rural routes sometimes paying more than urban ones), the timeslot they are working (in the case of one company's pricing which changes depending on how much driver demand there is for the delivery blocks) and the size of parcels they are delivering (if they work for a particular company which pays drivers per parcel delivered and has introduced a differential rate for small and large parcels). There can also be differences in pay rates depending on what local depot they work for as well as whether they are paid directly by a parcel delivery company or via a third-party intermediary (TPI).

Drivers often do not know in advance how much they will earn for the work, especially on a per hour basis, as this can depend on a number of unknowns, such as the number, and in some cases size, of parcels they receive and what route they are given.

3.3 Hours worked and extent of, and reasons for, unpaid working time

Of the 50 drivers represented in this research, half (25 participants) work part-time (less than 35 hours per week) and the remainder (25, or 50%) work full-time (35 hours or more). The average number of hours worked per week by full-time drivers in this research is significantly higher than 35 hours, with an average reported of just over 47 hours and almost half of full-time drivers (48%)²² working more than 48 hours per week²³.

Across the whole sample, over one-quarter of respondents (28%)²⁴ report regularly working unpaid hours²⁵. The extent of time spent working that is unpaid could be significant, with a median of 90

²² 12, (n = 25 full-time workers)

²³ The UK's Working Time Regulations 1998 establish statutory protections for employees and workers, including a 48-hour maximum average weekly limit (unless you opt out), minimum daily and weekly rest breaks, and a legal right to 5.6 weeks of paid annual leave, but these do not apply to self-employed workers.

²⁴ 14, (n = 50 total respondents)

²⁵ Unpaid working hours were considered by drivers to be those:

- Outside of set times for shifts (e.g. if a block or shift is 3 hrs and they work longer than this), some drivers reported their shift 'time' not starting until the vehicle is fully loaded and therefore loading time is not included in this price.

minutes and an average of 162 minutes (or 2 hours 42 minutes) per week, the latter affected by those working significantly more unpaid hours (the highest reported amount was 600 minutes/10 hours per week).

Time spent working that is unpaid could be due to delays caused by a variety of unpredictable factors including traffic and parking issues, variable weather conditions and difficulty getting access to some properties. As most parcel delivery companies do not pay by the hour, drivers do not regard the additional time required to complete rounds due to delays to be factored into their rates.

Parcel delivery companies' systems, processes and employment practices are also perceived to contribute to unpaid working time becoming systematic in this sector. For example, where drivers are paid by a block of time or per parcel, their pay is not seen to compensate for time spent at the depot to load or return parcels, or to travel to or from their route. In addition:

- Parcels reportedly routinely arrive late at depots creating delays in drivers being able to load up and set off.
- Most drivers do not receive consistent routes from the companies they work for, meaning that they may need to navigate unfamiliar areas which takes more time.
- Some drivers need to make two trips to the depot to load up because their vehicle doesn't fit all of their allocated parcels to complete their round.
- One company expects its drivers to attempt delivery of parcels multiple times before they return it and then only pays them once if they successfully deliver it.
- One respondent reported being required to attend the depot to be on standby and not being paid for their time to do this if they didn't end up being deployed for deliveries.

Once time spent working that is unpaid is factored into gross pay, the average rate reduces from £15.26 per hour to £14.93 per hour and the median reduces from £14.84 per hour to £14.44.

Chart 5: Hourly pay of parcel delivery drivers including time spent working that is unpaid²⁶

Average (mean) gross hourly pay including unpaid working hours ²⁷	£14.93 per hour
Median gross hourly pay including unpaid working hours	£14.44 per hour

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- Not directly related to the first delivery attempt for a parcel for those paid per parcel, so loading time, re-delivery time and any time to return parcels to the depot is essentially 'lost' or unpaid time because it does not relate to the pay rate they are being given.
 - In addition to informally agreed working hours for a day rate – e.g. if a day is expected to last 8 or 9 hours but ends up taking longer than this, the worker considers this unpaid time as they have mentally calculated their pay based on assumptions about the number of hours they will work

²⁶ The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

²⁷ Gross hourly pay including unpaid working hours was calculated by multiplying the calculated estimated hourly rate by the number of paid hours per week (e.g. total number of days worked per week x paid working hours per day, or hours spent doing work that those paid per parcel considered 'paid' because it involved delivering parcels), then dividing that amount by the total number of hours worked (hours that participants indicated were 'paid' + total estimated unpaid hours per week)

Base: All survey responses (n.52)

3.4 Extent and type of running costs and cost subsidisation

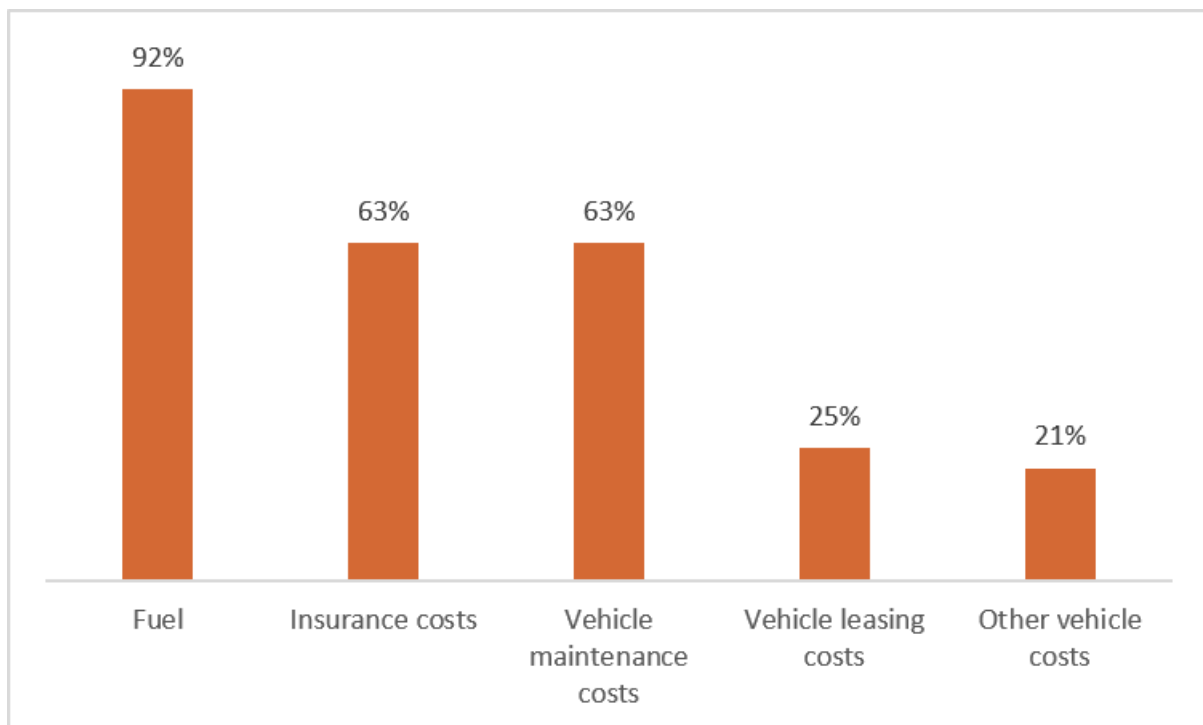
There are significant expenses associated with the job which typically include fuel, insurance and vehicle maintenance costs for owner-drivers and leasing plus fuel costs for those using company vehicles.

Of the 52 parcel delivery contracts described by drivers taking part in this research, the great majority (92%)²⁸ require drivers to pay for their own fuel and more than four in five (83%)²⁹ reported costs of at least one of the following:

- vehicle insurance (63%)³⁰
- maintenance (63%)³¹, leasing (25%)³²
- One in five (21%)³³ mentioned additional costs relating to their vehicle.

However, these other costs are likely to have been underestimated in the survey as they were not always as top-of-mind as running costs in the later qualitative discussions.

Chart 6: Main running costs incurred by parcel delivery drivers



Base: All survey responses (n.52)

²⁸ 48, (N = 52)

²⁹ 43, (N = 52)

³⁰ 33, (N = 52)

³¹ 33, (N = 52)

³² 13, (N = 52)

³³ 11, (N = 52)

Based on their individual responses, the average total running costs across the 52 survey responses are calculated to be £146.14 per week³⁴. This figure varies significantly between drivers, with a small number (3) incurring no on-costs and some having significantly higher than average costs due to vehicle leasing or very high mileage and fuel costs. Smoothing out these wide variations, the median weekly cost for drivers is £112.60.

Another key factor affecting costs is whether the driver works full-time or not. Among drivers who work full-time, average weekly expenses are higher at £218.40 and the median is £168.07.

Chart 7: Level of running costs incurred by parcel delivery drivers³⁵

Average weekly running costs (all respondents)	£146.14
Median weekly running costs (all respondents)	£112.60
Highest weekly running costs (all respondents)	£535.72
Average weekly running costs (full-time workers)	£207.57
Median weekly running costs (full-time workers)	£155.65

Base: All survey responses (n.52), full-time workers (n. 25)

While only a quarter of respondents (25%)³⁶ pay for vehicle leasing, this is the greatest weekly expense for those who incur it, at an average cost of £159.62 per week based on their individual reports. Vehicle leasing costs tend to be higher for those who work directly for parcel delivery companies (7 out of the 13 who work directly for parcel delivery companies and lease vehicles have an average cost of £208.11) than those working for TPIs (6 out of the 13 who work for TPIs and lease vehicles have an average cost of £111.39). Some specific examples of the leasing costs levied by parcel delivery companies include:

- At least three respondents who pay between £1,200 and £1,900 per month to the parcel delivery company for vehicle leasing and insurance (which does not cover fuel costs).
- A respondent who reported paying £1,000 a month for leasing and insurance, but this did not cover some of the maintenance, such as tyre changes and repair of windscreen or body damage, which they had to pay for themselves.

As shown previously, the great majority of parcel delivery contracts (91%)³⁷ require drivers to pay for their own fuel and this represents the second highest cost overall, with respondents on average paying £82.45 per week for fuel based on their individual reports, rising to £104.37 per week for

³⁴ Running costs were calculated by taking the estimated weekly, monthly or annual costs incurred by drivers and extrapolating a weekly cost for each where needed, adding these together and then subtracting any subsidy if this was received to calculate total weekly running costs. In the survey attached in Appendix 1, the relevant questions are 20-25 to establish running costs and 26-28 to establish any subsidy for running costs.

³⁵ The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

³⁶ 13, (N = 52)

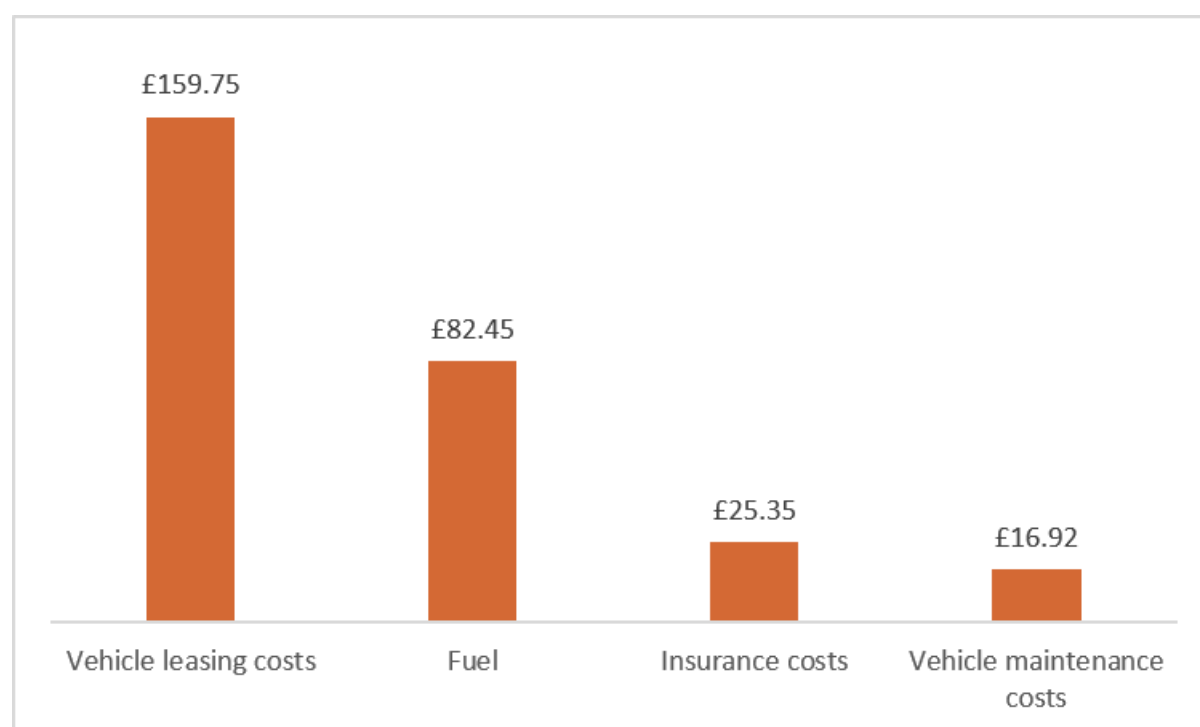
³⁷ 48, (N = 52)

those who drive full-time. Fuel costs are also higher for those driving rural routes or routes that are a significant distance to where they live. A number report that fuel costs have increased significantly over time, especially in the spring of 2026.

In addition, respondents who report incurring additional insurance (63% of the sample)³⁸ and vehicle maintenance costs (also 63% of the sample)³⁹ spend an average (or mean) of £1318.12 per year, or £25.35 per week, on insurance costs and £879.65 per year on vehicle maintenance based on their individual reported costs for these items.

Again, there is considerable variation in insurance costs across the sample, with some paying over £3,000 per year for specialist delivery driver insurance. Vehicle maintenance was not always identified as a business cost by drivers, without prompting, but some reported that delivery driving causes much greater wear and tear on their vehicles, especially their tyres.

Chart 8: Breakdown of estimated mean running costs⁴⁰



Base: All who incur vehicle leasing costs (n.13), all who incur fuel costs (n.48), all who incur insurance costs (n.33), all who incur vehicle maintenance costs (n.33).

In addition to these quantified vehicle costs, drivers also regularly receive fines for traffic and/or parking infringements which can significantly deplete their earnings. Most are also required to use their mobile phones to record deliveries and access their manifest for the day. They rarely

³⁸ 33, (N = 52)

³⁹ 33, N = 52)

⁴⁰ The data on costs should be treated as estimates rather than firm figures, as they are often based on driver estimates and on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

considered this a business cost or claimed back mobile phone costs on their tax but, when prompted, most felt that at least 50% of their mobile phone use was business related.

When quantified costs (excluding fines and cost of using personal devices) per week are calculated as a percentage of gross pay, these ranged between 0% (for those whose running costs are fully absorbed by their delivery company) to 80%. On average, 31% of their gross pay is absorbed by running costs and the median figure is 28% of pay.

Chart 9: Running costs as a percentage of gross weekly pay⁴¹

Running costs as an average percentage of gross weekly pay	31%
Running costs as a median percentage of gross weekly pay	28%
Lowest percentage of pay spent on running costs	0%
Highest percentage of pay spent on running costs	80%

Base: All survey responses (n.52)

The great majority (90% of the 48 responses indicating they incur additional costs)⁴² do not receive extra payment to cover any of these running costs. Those who do receive some recompense reported minor subsidies such as £20 per week for fuel costs, £7 per week for phone usage, and £23 a week for both mileage and using their own device.

The research did not explore whether drivers are preparing tax returns, or what their tax costs would be.

3.5 Extent and type of financial rewards and penalties

Most do not receive any financial rewards in addition to their base pay. For the few (19%)⁴³ who reported getting bonuses for meeting or exceeding performance targets, this is up to a value of £50 per day. A few also mentioned being paid higher rates for bank holidays and at Christmas, as well as on occasions that they are asked to help other drivers complete their round.

A larger minority (35%)⁴⁴ are at risk of incurring financial penalties if they do not complete all their allocated deliveries or for other reasons such as being late or having parcels go missing after delivery. Some specific examples of such penalties include:

- A £10-£25 daily deduction for late or deliveries or incomplete rounds where deliveries were not attempted.
- A £100 fine if not on time at the depot.
- The retail cost of a missing parcel deducted from their pay.

⁴¹ The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

⁴² 43, (n = 48 who incur fuel costs)

⁴³ 10, (N = 52)

⁴⁴ 18, (N = 52)

3.6 Mean, median and range of pay after costs

Once their reported regular running costs and unpaid working hours are deducted, the average hourly pay of the 50 delivery drivers in this sample is calculated to be £10.36 per hour, and the median is £10.91 per hour, both of which are below the National Minimum Wage of £12.71 per hour.

The lowest hourly pay after running costs is estimated at £2.89 per hour while the highest is estimated at £19.86 per hour. There is no difference in the pay after costs between those who are paid per block and those who are paid per parcel (£9.87 for those paid per parcel vs £9.90 for those paid per block) while those who are paid another way (e.g. per day) receive the highest average hourly pay after costs (£13.93 per hour).

TPIs are more likely to pay per day and those working for TPIs receive an average pay after costs of £11.12 per hour compared with £9.95 per hour for those who work for delivery companies directly.

Chart 9: Estimated hourly pay of parcel delivery drivers after unpaid unpaid working hours and running costs⁴⁵

Average (mean) hourly pay after costs	£10.36 per hour
Median hourly pay after costs	£10.91 per hour
Lowest hourly pay after costs	£2.89 per hour
Highest hourly pay after costs	£19.10 per hour
Average hourly pay after costs if paid per parcel	£9.87 per hour
Average hourly pay after costs if paid per block	£9.90 per hour
Average hourly pay after costs if paid another way (usually per day)	£13.93 per hour
Average hourly pay after costs if working for TPI	£11.12 per hour
Average hourly pay after costs if working directly for delivery company	£9.95 per hour

Base: All survey responses (n.52)

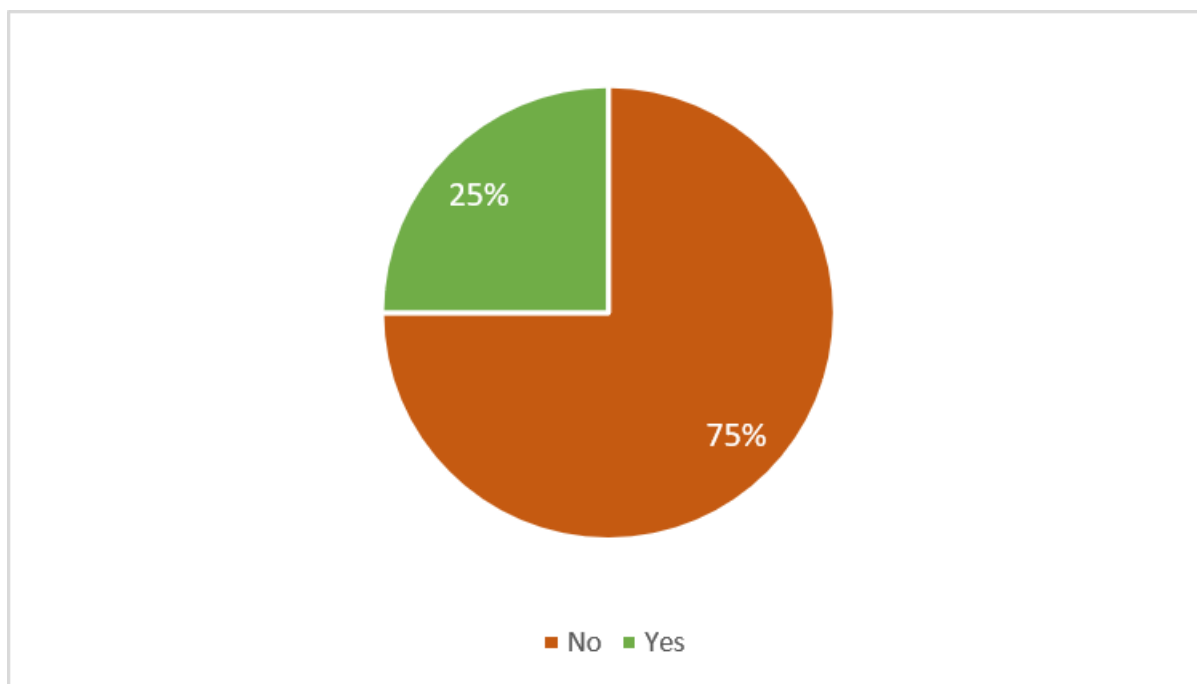
It is important to note that these calculations do not factor in the impact of bonuses or penalties, given the conditional and ad hoc basis on which these are levied. They also do not take into account tax payments of self-employed drivers, as investigating tax expenses was outside the scope of this research.

⁴⁵ The data on pay, hours and costs in particular should be treated as estimates rather than firm figures, as they are often based on ranges rather than fixed amounts so some averaging or selecting of the midpoint was required in some instances.

3.7 How pay after costs of delivery drivers compares with the National Minimum Wage

Of the 52 delivery driver payment terms included in this research, three-quarters of contracts (75%) do not pay the National Minimum Wage (NMW) equivalent once hourly pay after costs is calculated based on the hourly rates after costs reported above, with only one quarter of contracts (25%) receiving the equivalent.

Chart 10: Proportion of delivery driver contracts in our sample that were paid National Minimum Wage equivalent



Base: n.52 (all survey responses)

In addition, as self-employed drivers, most of those in the sample do not receive additional statutory benefits, such as sick pay or holiday pay, while none are eligible for an employer contribution to pension or maternity/paternity pay. By contrast, an employee earning the NMW would be eligible for all of these benefits. It is challenging to calculate the financial value of some of these benefits, particularly maternity/paternity pay, as these may rarely or never be used. As such, we have omitted maternity/paternity pay from our calculations and have estimated the hourly value of the remaining employee benefits to be as follows:

Chart 11: Value of employee benefits

Benefit type	Calculation method	Estimated hourly value
Minimum employer	● Annual NMW salary calculated using £12.71 x 35 hour week x 52 weeks = £23,132.20	£0.38

pension contribution	3% of NMW = £693.96 p.a./£13.35 per week/£0.38 per hour	
Minimum holiday entitlement	5.6 weeks or 28 days 28 working days at 35 hours per week or 7 hours per day equals 196 total hours x £12.71) £2491.16 per annum/£47.91 per week/£1.37 per hour	£1.37
Statutory sick pay	£123.35 per week for up to 28 weeks technically this benefit could be worth £3453.80 per annum, although it is unlikely to be fully utilised in every year.	£1.89
Total additional pay required to match employees receiving NMW		£3.64 per hour
Equivalent hourly rate to match employee NMW benefits		£16.35

Only 5 out of the 42 respondents who did not have any kind of “self-employed plus” contract earned the NMW equivalent including the additional value for sick pay, holiday pay and employer pension contribution.

Among the eight participants who had secured “self-employed plus” contracts, only one person earned over the official NMW equivalent of £12.71, demonstrating that this group remained financially disadvantaged with respect to employed workers, despite the additional benefits that they had secured.

3.8 Volume targets and time per delivery

Based on individual volume targets reported by the 50 drivers in our sample, the average delivery target for those involved in this research is 19 parcels per hour. This means that, on average, drivers have 3 minutes 9 seconds per parcel for delivery, including travelling time and without taking any breaks. However, volume targets vary considerably across the sample from 4 parcels per hour to 50 parcels per hour in one instance. Some drivers also have specific targets for timed deliveries which adds to their challenge.

3.8.1 Case studies illustrating volume targets

26 year old woman, paid by block

She never knows how many parcels she will have to deliver when she accepts the payment rate for the shift. When she arrives at the depot she finds out how many parcels she has to deliver in that block. On average she has 200 parcels for a 4 hour shift, but sometimes she gets there and finds that there are many more to deliver in that time.

“I’ve seen someone complain about getting about 600 parcels [for a four hour shift].”

46 year old man, paid per parcel

On the delivery service app it is possible to set your estimated delivery speed at slow, medium or fast. Even working at a 'medium' speed he finds it impossible to deliver the 70 parcels allocated for his round within the timings given on the app. This means he is frequently working much longer hours than he expected and his estimated hourly rate is lower than he was expecting.

"Not being able to park, people not being home. Sometimes you've got to knock on neighbor's doors..., it's not realistic at all in terms of what they're expecting."

44 year old man, paid per day

He usually has around 200 parcels per day to deliver and the system allocates 8.5 hours for him to make the deliveries, no matter how many parcels he has. On a bad day he can end up working 14 hours per day to complete his route. If he's struggling, other drivers can be allocated to help him complete his round, but this is then deducted from his day rate.

"If someone finishes really early and then you're struggling, they'll send them to help you... but then you lose 25 quid of your money."

4. Driver perceptions of their pay and working conditions

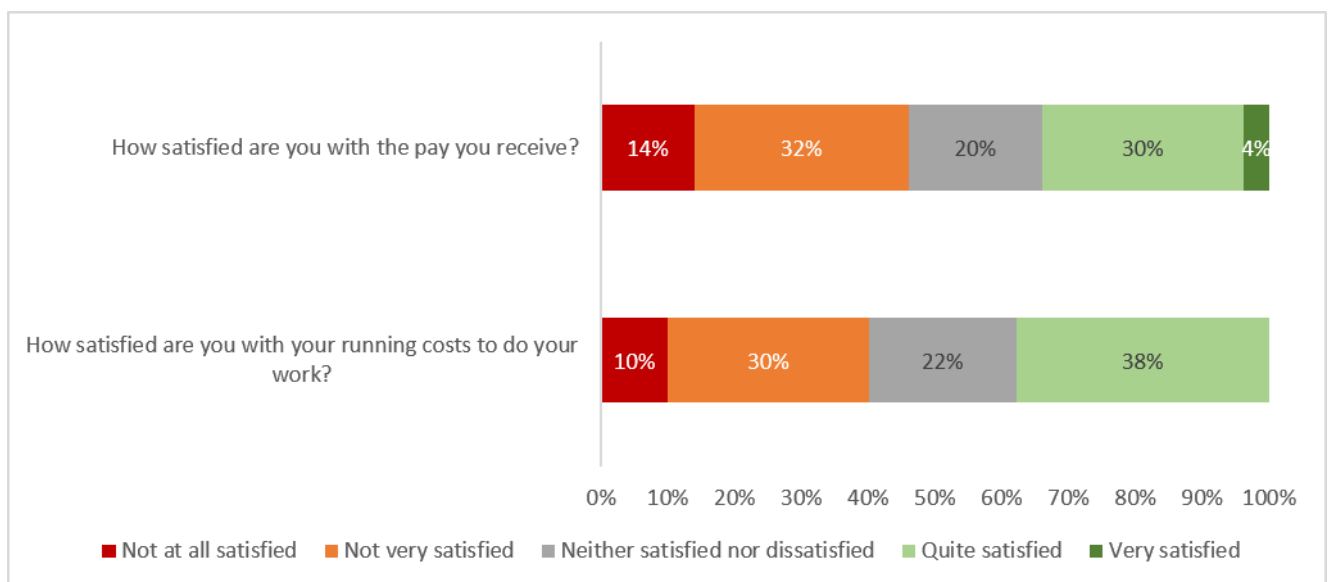
4.1 Perceptions of their pay and costs

Most got into parcel delivery driving work through personal recommendation or due to living near a depot, and few did any comparison of pay or conditions across different companies when they were entering the sector. Some have now heard what other companies are offering but there is not perceived to be any stand-out performer in terms of providing superior pay or conditions amongst those companies with predominantly self-employed drivers.

Drivers tend not to be focused on earnings after their running costs are deducted. Few have calculated how their hourly rate compares to the National Minimum Wage and even fewer the lost value of sick and holiday pay as well as employer pension contributions compared to if they were an employee.

Notwithstanding this, more are dissatisfied (46%) than satisfied (34%) with their pay, with one in seven (14%) stating that they are very dissatisfied. In addition, as many are dissatisfied (40%) as satisfied (38%) with their running costs. In the qualitative research it was apparent that drivers do not routinely calculate their running costs so were not always fully cognisant of how much these amounted to in aggregate. Once they had considered this in more detail, dissatisfaction with their running costs tended to increase.

Chart 12: Satisfaction with pay and running costs



Base: n.50 (All respondents)

In the qualitative research, those who had been in the sector for several years reported that pay rates have declined over time and that this decline has been accompanied by higher targets.

"I remember when I first started, I was on around 85p a parcel. Work was less busy back then, so it was less parcels and you were getting paid more per parcel. As the company's grown, you're getting more parcels and they dropped the rate ever so slightly and then

dropped it slightly again. So, then they said, 'oh, well, what we can do is we'll give you some holidays and we'll drop your rate again'. I said 'I don't want to do that' because some people did that and it dropped their rate about another 10-15%. Eventually they made me sign it and said 'if you don't sign it, can't keep you on anymore'."

"The ownership has changed hands twice since I've worked for them...We used to get £1 on a heavy parcel and it's dropped 30-35%."

"It just seems the way the industry is going, they're just stripping money and the main sources are drivers. There's competition and all that and they have to make cuts somewhere and it always just seems to be with us."

Longer-term drivers who work for a particular large parcel delivery company are very critical of the introduction of variable rates for different sizes of parcel, which they feel have led to greater complexity, more opportunity for errors in classification, less transparency about earnings and lower pay overall.

"Because [the company] introduced this more pocket rate and I just couldn't afford to work there anymore ... you were working so hard for like a quarter less pay."

Overall, the majority feel that their pay is not sufficiently commensurate with the demands of the work or the associated running costs.

"The routes, the amount of parcels. For me, from what I've seen, they take advantage of individuals. And it's really unfair. I mean, it's harsh labour."

"[The pay] doesn't go well with the amount of work you have to do, because you have to carry all these parcels and some of these are heavy, you have to climb stairs sometimes and you have to also make sure that these parcels are delivered. Some customers don't give safe spaces so it's your own responsibility to make sure that everything is delivered well, and you're doing this, trying to deliver a lot of parcels and giving good customer service."

"I feel like also they expect a lot of the costs to go onto the person who's actually driving the vehicle. So, if there's a parking ticket, they don't pay for things like that."

Some perceive themselves to be underpaid relative to the profits that they believe delivery companies are making. Some also feel that these companies are not sufficiently compensating them as self-employed drivers, given the savings companies make by not needing to pay them benefits (in most cases).

"I believe they make so much more money than the cut that's given to the driver. I'd say, 25 to 35% of what they actually make from that block."

"I follow the business news. They have high turnovers and profits. It costs £3.20 for a customer to send a standard small parcel and the courier only gets 15%-20%. I know they have network and warehouse costs but it's too weighted towards profit."

"The fact that you're self-employed so they don't have any of the employer's contributions or anything else that they would make if we were employed should be reflected in our rates."

The fact they don't have to pay us holiday pay, sick pay should be reflected in our rates. We should be making more than just a living by being self-employed because then we have to cover those costs. If we are sick, we need to have money squirrelled away to be able to cover your costs while you can't work. If we do go on holiday, obviously we don't get holiday pay, but we should, again, have money squirrelled away that you can afford to take a holiday."

A number report struggling to make ends meet on their earnings from delivery driving, although for others the work is an important and necessary way of topping up the income they receive from other sources.

"It's not easy. £1000-£1300 per month is not enough for your main job...The main issue for me, also, is the sick pay aspect of it and the holiday pay, basically the lack of that, which is a problem for me."

"I'm on the bare minimum with two jobs because of the cost-of-living crisis. I think I'm down by £150 a week given the amount of work I do [referring to unpaid time]. My round is quite large and has one of the largest volumes of a single round and my continuity is high which should be rewarded."

"I'd say it'd probably be a bit impossible [to cover personal and household expenses with this job]. If this is, like, your only income, it's not gonna be easy to pay for everything just on £250 a week, you know, like a grand a month. I think it would be quite difficult to just live off of just this job. You have to do other things."

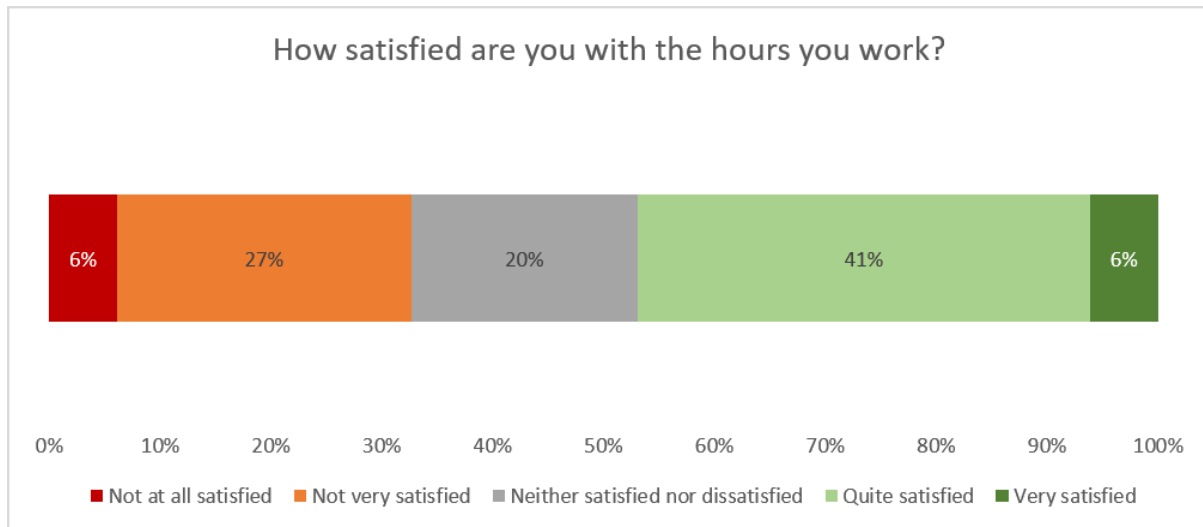
There is no consensus on which payment model is preferable. Some of those who are paid by block value report that, while it provides guaranteed earnings, it doesn't specify the number of parcels or route so the actual time that will be taken to complete the deliveries is unknown. Payment by parcel conversely provides no guarantee of earnings but is viewed by most of those who receive this as more transparent and affording the driver greater control. The minority who are paid an hourly or daily rate like the simplicity and predictability of this.

4.2 Perceptions of their working conditions

4.2.1 Working hours

Of the 50 respondents to the survey, more stated that they are satisfied (47%) than dissatisfied (33%) with their hours of work.

Chart 13: Satisfaction with hours of work



Base: n.50 (All respondents)

In the qualitative research, many drivers report that they were initially motivated to get into this work due to the flexibility it offered and this is the aspect that they continue to value.

However, having flexibility of working hours comes with a downside as it means that the majority do not receive guaranteed shifts. Of those allocated shifts by their depot, some are only advised of upcoming shifts shortly before. For those who are expected to self-select from available blocks, it can be very competitive and challenging to secure these. This affects drivers' security of earnings and means it can be difficult to plan other commitments around their delivery of work.

"They don't post if you're working the next day until the day before, which means you can't plan. You're just sitting there waiting until around 8 o'clock to find out if you're working tomorrow. Even then, you can be there in the morning and you can be on standby and if you're told to go home you just go home and don't earn nothing."

"There are less shifts on [the app] sometimes and also basically too much competition on there. That's the main reason for me is that. [I'd prefer] if there were basically more opportunities in terms of the notifications I'm getting."

"It's kind of first come, first serve. So, if I'm not on the app actively looking, I don't get any shifts. I think that could be something that could be better, actually being able to have shifts. You're not guaranteed that you're even going to get a shift really sometimes."

In addition, flexibility of hours means most do not receive consistent routes and therefore have to deal with delivering to unfamiliar areas. This can mean it takes longer to complete their shift which can also affect their earnings.

"When you go for a block you kind of just get given an area. So, I live in Leeds and I could deliver in Pontefract, Wakefield or Huddersfield or you can go all over the place. I think it'd be fair if you kind of pick, I'd rather stay in Leeds some days or some days I might not mind going to York. I think that would be better."

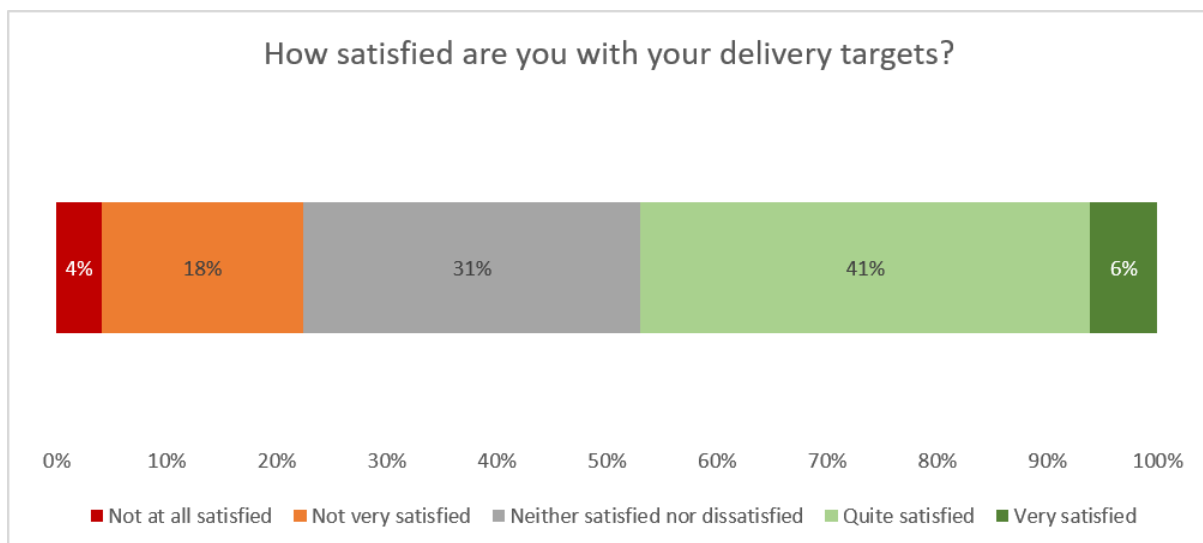
Conversely, those with full-time hours and a regular route are expected to fulfil this route or risk losing it, meaning that they are not able to exercise flexibility over their hours even though they are technically self-employed.

Consequently, a number felt that flexibility offered benefits the company more than them.

4.2.2 Volume targets

Of the 50 survey respondents, just under half (47%) stated that they are satisfied with their delivery targets, around two in five (41%) gave a neutral response and just over one in five (22%) said that they are dissatisfied. The higher level of satisfaction than dissatisfaction may be because their level of earnings is predicated on the volume of deliveries they achieve.

Chart 14: Satisfaction with delivery targets



Base: n.50 (All respondents)

However, the qualitative research found there to be polarised views on targets. While some drivers can manage their volumes due to their experience and/or familiarity with their route, a number state that the volume of parcels they are expected to deliver is very challenging to achieve.

"Sometimes in the mornings, you might get your cage and there are like 150, 160 parcels and it looks a bit overwhelming. You're just thinking about the whole day, loading up these parcels, knowing you need to be quick and efficient, because the longer you take, the later you'll finish."

"The company I work for, the route that they've given you and the amount of parcels, it's basically impossible to finish. But then, if they don't think you're gonna finish, they'll send someone out to come and collect some parcels off you and, however many they take, they deduct a pound a parcel from your actual day rate that you're supposed to earn."

Longer-term drivers observe that the volume has increased over time, which they believe to be linked to increased online shopping since the pandemic as well as to supply side changes such as the promise of faster (next day, same day) delivery. Some also report receiving more heavy parcels.

4.2.3 Self-employment

A number stated that they became self-employed delivery drivers at least in part due to it being relatively easy work to get into, compared to other roles offering permanent employment. Overall, while some prefer to be self-employed because it affords them flexibility, others do not feel they enjoy flexibility even though they are self-employed, as they work full-time and have restrictions on taking time off.

"A self-employed person can say 'right, well, I'm not going to work today.' That's not me...If I don't work that shift that day or take those parcels out that day and I haven't got anybody to cover me, I'll fail the round and lose the round."

In addition, one respondent reports that they are not permitted by their company to work for other parcel delivery companies.

A number also refer to being heavily monitored and subject to threats of losing shifts, routes or their job if they don't meet expectations.

"We're always monitored, there's a camera facing the driver, and there's also the camera facing outwards...They're just constantly on the phone telling you to keep up, you're running behind, you should have delivered this amount of parcels within this time frame."

"If you return parcels back to the warehouse, then they'll just be like, 'why have you returned so many?' And it will sort of be within your profile, it'll be written down as a negative...You'll probably be refused shifts. You won't be as required as maybe the others who are more competitive."

"Whatever happens, your standing always goes down. So, they tell you if your time finishes, you don't have to continue delivering. But you take it back to the delivery place and then two days later your standing will go down because you didn't deliver those."

Many feel undervalued by the organisations they work for, which some connect to the power imbalance between companies and workers in the gig economy model. There is also perceived to be a high demand for courier work which contributes to driving down pay and conditions. This research was not designed to identify bogus self-employment, but the indications from some drivers of a lack of flexibility around working hours and even who they can work for in practice raises important questions for further investigation around how genuinely self-employed workers are in the sector. Most feel disempowered to challenge their pay and conditions, although some longer-term drivers

and those who receive additional benefits reported that they had engaged with their management and/or union to try to effect change.

"Obviously, there's no benefits or anything, so if I'm sick, I'm not earning anything. That is just one of those things with this job. It is like that gig economy kind of stuff, you can't really do anything about it."

"Having self-employed drivers or on zero hours contracts means [companies] have more power and less commitment... It's very evident that couriers are just numbers and very easily replaceable."

"If you're directly hired, they have to then give you a contract, working proper contract, then they have to give us all the benefits as an employee, all that. So obviously they're trying to avoid all that."

Several would prefer to be an employee due to guaranteed pay, benefits and greater job security, but they feel that this opportunity is rarely available in the parcel delivery sector as most companies prefer to work with self-employed drivers.

"I want the benefits and the pension if I'm working for the company. Yeah, definitely... But a working-class person now, I think they have to go to some kind of third party to get a job."

"I'd rather be employed just for the fact of getting holiday pay because now I don't get paid for holidays. I don't take many holidays. I think, well, if I take a week off, I'm not earning any money...but I don't know anyone that's employed. As far as I know, every single delivery job is self-employed."

While the self-employed plus model is not widely known, some would also welcome receiving additional benefits as a self-employed driver. However, others suspect that this may result in a significant drop in their pay rates and that they would be better off to self-fund their time off. Those with experience of this model report that eligibility is heavily restricted (to those working six days a week) and that it can be difficult to secure the benefits (with holidays accumulated based on how many parcels are delivered and requests for holiday needing to be made several weeks in advance).

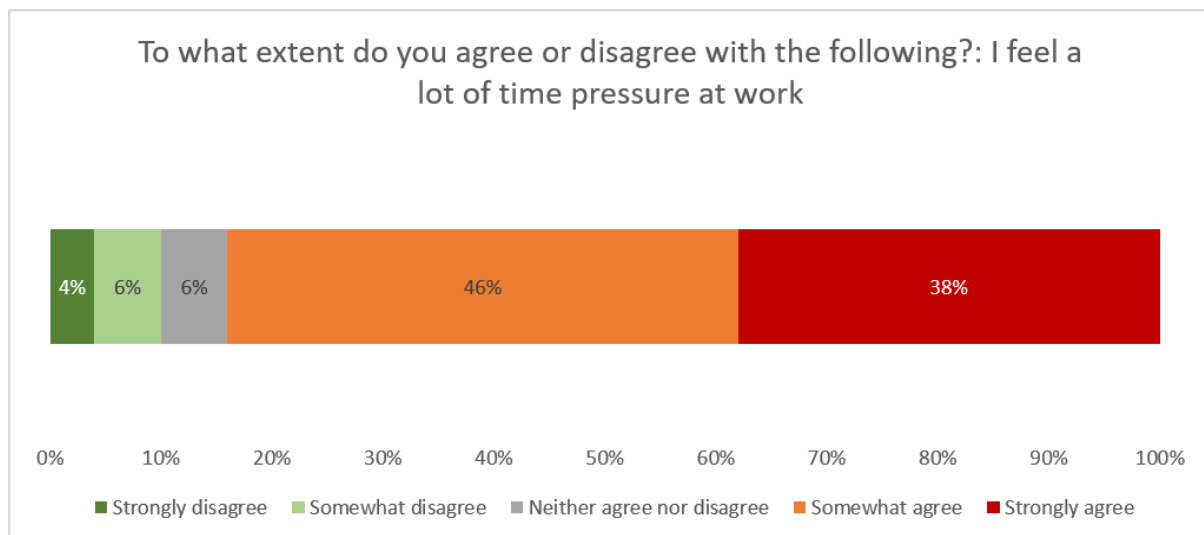
"When they introduced this, you had to give two-weeks notice max, which is fine. And then after that they decided to say, no, we're going to make it six weeks. And they decided to basically accumulate your holidays by how many parcels you've delivered. So, every day I'd accumulate a quarter of a day say, but then they just decided to just keep changing and over complicating it. At the end, they decided you could only use single days twice a year, or you could use block holidays, which is a week at a time."

5. How pay and conditions create pressure on drivers

5.1 Drivers' feedback on the volume and time pressure they experience

Of the 50 drivers involved in this research, the great majority (84%) agree that they 'feel a lot of pressure at work', with nearly four in ten (38%) strongly agreeing with this.

Chart 15: Perceptions of pressure at work



Base: n.50 (All respondents)

The primary source of this pressure is the targets drivers need to meet in order to achieve sufficient earnings. This is both in terms of number of parcels they need to deliver and the expected timeframes for delivery.

"It's stress at the end of the day, isn't it? Stress for delivering the products on time, stress that you want to get the work done in the time allowed. You need to be on the ball when you're delivering. You've got no time to mess about, not mess about, but you got no time to linger on and get delivered. You're at one address, you need to go to another address and you're just always on the move. It's quite challenging. It's quite physical as well. Getting in and out of the car 20, 30 times, it's physically exhausting as well."

"I think it was only last Friday that I missed my window because there was a massive accident on one of the main roads in Cardiff and my round was in that area. So, I went behind about 45 minutes on my window. Then every stop I'm doing, I'm chasing, trying to catch up. But then you come to the law, you can't speed. You're trying to contact the manager. They never respond and they never reply to any issues. Honestly, it is stressing. It's very stressing. There's no understanding there. As long as their parcel's getting delivered, they don't care as long as it's in that window."

Due to the pressure of the job, drivers report constantly rushing and not taking breaks.

"You know, you're in a rush, you've got to complete all of these tasks, you can't even go to the bathroom. So, individuals have used, and so have I used, an empty bottle to relieve ourselves."

"You're always rushing. You've got a mental cloud over you, trying to make sure you're doing this, trying to think about things outside. Am I going to be able to pick my daughter up today? Do I need to organise something else? And are we gonna get enough this week to pay for what we need, and so on and so forth... I'm definitely stressed, 100%"

"I think a break doing the shift is impossible anyway. I think even stopping for a toilet can put you behind your time. I mean, it can be just impossible to finish the block and if you're finishing later it's going to affect your standing, it's going to put your account in jeopardy. Yeah, it does make you rush a lot. It adds pressure onto it because you don't want to be at risk of losing the job, but then you also might need the toilet, it might be urgent, you might have to stop to take a phone call, you might need petrol in the middle of the shift. You're not really able to do them things."

Some also mention sustaining injury due to the volume and weight of the parcels they are carrying. There may also be safety risks e.g. from speeding on the road given their time pressures or due to fatigue from working long hours and not taking breaks.

5.2 How payment models and employment practices create driver pressure

The sector prioritises volume and speed of delivery and this means that drivers' earnings depend on their efficiency in completing their rounds and on them making the delivery rather than needing to return or redeliver a parcel. Parcel delivery companies do this by:

- Paying drivers per parcel successfully delivered or for a block of time with the expectation that they deliver all their allocated parcels in this time.
- Not paying drivers any allowance for loading, travel, waiting time or delays.

There are many factors outside drivers' control that can affect their speed of delivery and therefore earnings, all of which contribute to the pressure they experience. One of the most regular and complained about is delays and conditions at depots meaning it can take considerably longer than expected to load parcels and set off.

"My time slot is a second time slot, 9am. So, I get there, but more than likely you won't get your parcels till probably half nine. Excuses are that the vans are late coming in or someone's not turned up to sort the parcels out. Then you've got to load all your parcels up. Once you've got your cage, you've got to load the parcels up sometimes out in the rain so they're getting wet. There's no cover. Then you've got to go back for the second cage possibly and then other people are trying to get their cages out. So that's the bit which you're not getting paid for. Then you've got to go back and get any parcels that are high value parcels and you have to scan those in front of a supervisor in a depot...That is the worst part of the job."

In addition, drivers report being regularly slowed down by:

- Delays caused by road conditions, traffic and parking issues.
- Challenges in locating addresses or gaining access to premises.
- Needing to wait for customers if they are taking collections in addition to making deliveries.
- Returning undelivered parcels to the depot at the end of their round if required as most are not paid for this time.

Different types of routes also come with different pressures. Those driving in urban areas have to contend with more traffic congestion, parking problems and a greater risk of incurring fines, as well as challenges in gaining access to flats. Conversely, those driving in rural areas find their routes take longer due to having to travel further between drops. They also report issues finding properties, as well as higher fuel costs, and more wear and tear on their vehicles.

It is especially challenging for some drivers to meet the expected targets and achieve earnings at or above National Minimum Wage. This is especially if they are less experienced with several reporting a lack of training or support for new drivers.

"I did a trial training shift for them for a day and wasn't paid. I never went back because it was really horrible anyway. I think when they were giving the training, it was rushed. No one was even explaining to you how to scan the packages. Everything was just rushed. The person who was doing the training didn't have time for me. I didn't know what to do."

"I know my area now, I don't need maps or anything, so nothing's slowing me down. But for new drivers, it's difficult. I think they start them at two minutes and sometimes they're out till seven o'clock at night."

In addition, it is felt to be more difficult for older drivers due to the physical demands of the job. Some bring friends and family along with them to help them get through their allocated deliveries. Some also stated that they have been injured due to the job.

"I do feel tired quite a lot now. As I'm getting older as well. When I started it, I was 43 and I'm coming up to 50 now. So, I am feeling it more now. I think it is more of a young person's job and I definitely get little aches and pains. I think I've got sort of tennis elbow in both elbows and that's from lifting parcels."

"Sometimes there are big parcels... And I had that one time I had pulled my back. So, after that, I didn't want to risk it because I said there's no benefits towards sick pay or that, so I didn't risk it. "

"I've twisted my ankle before and all my leg went bruised. I had 20 stops left and said to myself 'oh, can I keep going? I've only got 20 stops left'. But if you saw the photo of my foot, my leg went black. I thought I broke it but I carried on."

5.3 Other sources of driver pressure

Apart from the volume and time pressures referred to above, a number said that they would want to work more hours than they do currently in order to meet their daily living costs. Those without

consistent shifts find it more difficult to plan the work around their other commitments and experience more insecurity about their earnings.

Conversely, as those with regular routes are expected to fulfil these on a full-time basis it makes it challenging for them to take leave, with an ever-present threat that their route will be removed from them.

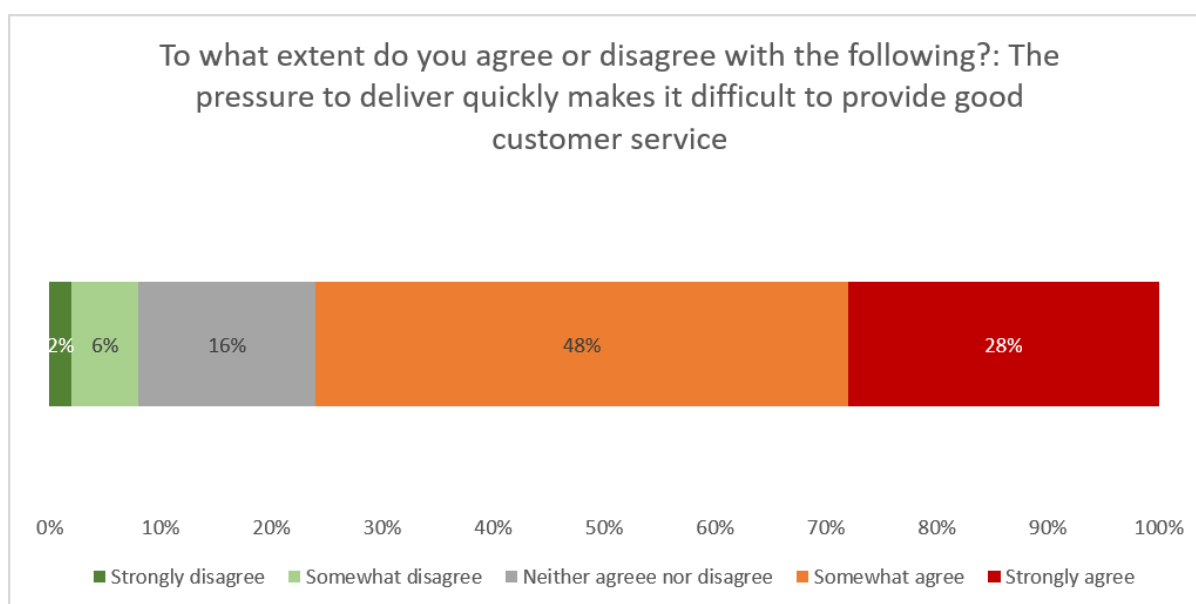
Those who are heavily monitored and experience hostility from managers report that this adds to the pressure they are experiencing. This includes being subject to the threat of less work in future or to being dropped entirely for not meeting expectations.

6. How driver pressure affects quality of delivery

6.1 Extent to which customer impacts are perceived by drivers

Most drivers (76%) agree that 'the pressure to deliver quickly makes it difficult to provide good customer service', with nearly three in ten (28%) strongly agreeing with this.

Chart 16: Perceptions of customer impacts of driver pressure



Base: n.50 (All respondents)

However, pressure impacting the quality of delivery is perceived not just to be restricted to final mile drivers but also to affect workers at the depot due to their own pay and conditions, and local management due to the expectations of head office.

6.2 Main types of impacts identified through this research

6.2.1 Doorstepped parcels

Leaving parcels unattended, and potentially in unsafe locations, if the customer is not home or takes too long to come to the door is reportedly very common. This is for several reasons including not having enough time to wait if want to get through their route, not being paid if they do not deliver (in the case of those whose pay is per parcel) and not wanting to spend unpaid time to attempt redelivery or return parcels to the depot if this is one of their requirements.

"A lot of drivers are encouraged to leave parcels at doorsteps, sometimes in safe places, but mostly on doorsteps, so they can get it done the quickest. Then you find customers that are in, they might see the email saying it's been delivered, come outside and you're still there because you're still delivering stuff on the road, and they're shouting after you, 'oh, you didn't ring the bell, and blah blah blah, or you haven't done this'. And it's because, generally,

people are just trying to get it finished because if they don't get it finished they don't get paid."

"You have to hand it to somebody, which is another thing... But I tend to sort of put it in a place where it can't be seen because again, down to time, the time you don't deliver it, you then have to put it back in your car and return it or deliver it on your next shift and it's not always possible. So obviously you'd be getting paid the same but having to go twice to the same address, so it's like even less then."

"I asked the managers are we expected to just leave [parcels] on the doorstep because it seems to be the only way that it's feasible [to get through the volume of parcels]. And they suggest that it's not but I think that is in a way. I try not to and when I knock on the door and know somebody's in, I still like to just have them answer the door, but you feel it is to your own detriment to actually try and do things properly. I think the only way that you can make it even remotely feasible to actually be paid what they suggest you get supposed to get paid would be to park in the middle of the street, jump out, throw the parcel down and be dishonest about where you're leaving it."

"You have to keep motivated and you've got to keep going at a certain pace. And if you're paid per parcel, especially if you get out the depot late, you will, I know it's wrong, but you will leave them in places where perhaps you shouldn't leave them, but that's because you're under a bit of pressure if you're out late. I think as a customer, I think you get a better service like the Post Office when the guys are not self-employed and they've got all the time in the world."

6.2.2 Less able to assist customers with disabilities or additional needs

Few respondents reported receiving formal training in general and only one driver could recall receiving any training specifically on how to engage with disabled customers. In addition, only a minority reported getting some disabled customers or those with additional needs flagged on their delivery app. Drivers are more likely to become aware of disabled customers through having a regular route or seeing visible signs at their property.

Most claim that they would try to allow more time for a customer known to be disabled to get to the door, and give them more assistance, but they also admit that it could be challenging for them to do so given time constraints.

"You're just trying to get in and out, move on to your next stop, but they genuinely can't [get to the door quickly]. Maybe they might have a wheelchair, maybe it could be just old age and they can't move as quickly as they could, and they could be upstairs, and that journey for upstairs could take them at least a minute. A minute is a long time when you're doing this job."

"You could spend that extra minute or two [for a disabled customer] but I mean then somewhere along the line, I will then be getting my boss on the phone saying 'where are you?'"

"I mean, to be honest with you, to get through all them parcels, we literally give them five, 10 seconds after we're knocking the door. If we don't hear any sound, if we don't see any movement, what we'll do is we're looking for somewhere to put the parcel straight away. If you're having to wait another minute [for a disabled person] it's just making your day longer and longer but no one is paying you any more."

6.2.3 Other risks

Driver pressure is also perceived to contribute to a greater risk of:

- Parcel damage or loss through rushing and due to space constraints in depots and vehicles.
- Delivery delays if drivers are unable to meet designated delivery slots due to the volume of their work.
- Mistakes being made (e.g. delivering to the wrong address) due to time pressures and some having friends or family members helping them who are not experienced in parcel delivery.
- Not having time to engage with customers, including if there is a problem with the delivery.

"People are using cars so parcels are just getting shoved in boots, back seats, passenger seats, they're all just piled up. There is a greater risk of things getting damaged, especially if you're trying to sift through everything and get to the house quickly to get to the next house."

"You could have so many parcels that you're trying to sort through and because you're rushing to do that, you might miss a parcel, you might take longer to find it. I do think that does affect [customer service]."

"It can just be because drivers are pressured on time, they don't get to even have a contact or any form of communication with the customer because you're just that pressure to deliver it. So, the drivers will just go knock on the door, give you the parcel and go. You can't have that kind of interaction with them at all."

In addition, the following practices were referred to by some respondents which could also lead to poor customer outcomes:

- Undelivered parcels being left in unsafe places, like in their vehicles, overnight if they are not required to return them to the depot.
- Drivers using workarounds that are not in customers' interests e.g.:
 - Taking a photo of a parcel in the mailbox indicating that they delivered it there but then leaving it on the doorstep as it wouldn't fit (mentioned by one respondent).
 - If they are unable to adjust their delivery timings, marking a parcel as delivered when it wasn't and then rescanning and redelivering it later (mentioned by one respondent).

6.3 Suggested improvements from drivers

The main suggestions made by drivers for improving service quality were, not surprisingly, to raise pay rates and reduce volume targets.

"I'd say if they kept the same pay and reduced the hours and the amount of locations and parcels. That would be highly motivational, and they would increase the load of people requesting to join their team."

"The targets need to be realistic. I know everyone wants their things the next day, and so on and so forth, but it's just not realistic. We can't live in that world where you order it today and it comes tomorrow, every single time."

"They have got bad press for their service but couriers aren't paid enough so they're not going to give 100%. They should increase round rates. In turn that will increase staff productivity and lead to better rapport with customers which equates with better service."

There were also suggestions to loosen delivery timeslots and to pay for waiting and travel time.

In addition, some called for improvements to systems and processes that they felt would enable greater efficiency and reduce pressure. This included:

- Making changes to how depots are organised (e.g. allocating more space for cages).
- Providing depot workers to support drivers when loading.
- Providing technology upgrades (e.g. addressing glitches, providing better route maps).
- Improving cover arrangements when a driver is unwell or wishes to take holiday.

7. Conclusions

Evidence provided by this research suggests that the predominant payment models and rates of pay offered in the parcel delivery sector create significant risk that self-employed drivers will not earn a National Minimum Wage equivalent once their costs are taken into account. While average gross hourly earnings amongst our sample appears to exceed National Minimum Wage, after running costs are deducted four in five drivers in this research earn below it.

The research also found evidence of regular unpaid working time across the sector. More than one quarter of respondents reported regularly working unpaid hours, often due to loading vehicles, travelling to and from routes, returning parcels to depots, waiting for delayed parcel arrivals or dealing with operational issues beyond their control. As most drivers are not paid by the hour, this additional time reduces their effective hourly earnings.

The gap between earnings before and after costs is largely driven by the transfer of business costs and risks from parcel delivery companies to drivers. Most drivers are responsible for fuel, insurance, vehicle maintenance and other work-related expenses, with running costs absorbing one-third of gross earnings on average. These costs are rarely fully reimbursed by companies and can vary significantly depending on route characteristics and vehicle arrangements.

In addition, self-employed drivers, who represent the majority of workers in the parcel delivery sector, miss out on a number of benefits with monetary value which they would be entitled to if they were employees. Under one in ten (8%) in this sample achieve a NMW equivalent of remuneration when the value of statutory employee benefits is also added.

High levels of work intensity appear to be a defining characteristic of self-employed parcel delivery work. Drivers are expected to deliver large volumes of parcels within tightly constrained timeframes, while also managing traffic, parking, property access issues and customer availability. The great majority report feeling pressured at work and many described routinely working without breaks in order to complete their routes and protect their earnings.

Although many respondents value the flexibility associated with self-employment, the research found that the reality of working arrangements is often more complex. Drivers frequently reported limited control over routes, uncertainty about future work, pressure to maintain performance metrics and concerns about losing shifts, routes or income if expectations are not met. For some, the practical experience of parcel delivery work offers less independence and benefits of flexibility than might typically be expected from self-employment.

This research provides further evidence that the pressures parcel delivery drivers experience can contribute to poorer customer outcomes. In particular, the extremely high-volume targets that drivers are expected to meet under tight time constraints clearly incentivise speed over delivery quality. Three-quarters of respondents agreed that pressure to deliver quickly makes it difficult to provide good customer service, and drivers described practices such as leaving parcels unattended, not engaging with customers and having insufficient opportunity to support people with disabilities or additional needs.

Overall, this research therefore supports Citizens Advice's longstanding concern that consumer outcomes are closely linked to pay rates and working conditions in the parcel sector. Drivers

consistently identified pay, targets and working practices as key drivers of behaviour, suggesting that many of the delivery problems experienced by consumers are not solely the result of individual performance but are also influenced by how the work is organised and remunerated across the sector.

Whilst acknowledging that there is no legal requirement for self-employed drivers to be paid a National Minimum Wage equivalent, the findings raise questions about the sustainability of existing payment models and working conditions in the sector and whether these deliver fair outcomes both for self-employed drivers and consumers. Improving pay transparency, reducing excessive pressure and ensuring self-employed drivers are appropriately protected could significantly benefit both what is a large part of the parcel delivery workforce and the consumers who receive parcels.

Appendix

A.1 Quantitative questionnaire

Parcel delivery driver employment conditions survey

This survey is being conducted by independent research agency, Spark Insight. It has been commissioned by the charity Citizens Advice to find out about the pay and working conditions of parcel delivery drivers.

The survey should take around 10 minutes to complete and your answers will be treated confidentially.

By taking part, you will be providing evidence to help in Citizens Advice's campaigning work to improve pay and conditions in the parcel delivery market and enable better service for end customers.

Initial questions about your work

- Q1 *ASK ALL:* Which parcel delivery company or companies do you currently work for?
- Q2 *IF CURRENTLY WORK FOR MORE THAN ONE COMPANY ASK:* Which company do you do most work for?

Pay and employment conditions

QUESTIONS FOR MAIN/ONLY PARCEL DELIVERY COMPANY RESPONDENT WORKS FOR:

- Q3 *ASK ALL:* Are you paid directly by *[INSERT MAIN PARCEL DELIVERY COMPANY NAME]* or by a third-party fleet or intermediary which is contracted to deliver for this company?

- | | |
|---|---|
| Paid directly by parcel delivery company | 1 |
| Paid by third-party fleet or intermediary | 2 |

- Q4 *ASK ALL:* Which of the following best describes how you are paid for your work for *[INSERT MAIN PARCEL DELIVERY COMPANY NAME]*?

- | | |
|---|---|
| Self-employed with no sick pay or benefits | 1 |
| Self-employed with sick pay and benefits (self-employed plus) | 2 |

- Q5 *ASK ALL: How are you paid for the work you do for [INSERT MAIN PARCEL DELIVERY COMPANY NAME]?*
- | | |
|---|---|
| Paid per parcel delivered | 1 |
| Paid per hour for the time it takes me to deliver my parcels | 2 |
| Paid for a fixed number of hours, even if it takes me more or less time to deliver my round | 3 |
| Other - WRITE IN: | 4 |
- Q6 *ASK THOSE WHO CODE 1 AT Q5: You said that you are paid per parcel delivered.*
Please can you write in how much you are paid per parcel?
If you are paid different amounts for different parcel sizes, please include this information too.
For example: 80p per small parcel £1 per large parcel
- Q7 *ASK THOSE WHO CODE 2 AT Q5: You said that you are paid per hour for the time it takes you to deliver your parcels.*

Please can you write in the hourly rate you are paid which shows on your payslips or rate card?
- Q8 *ASK THOSE WHO CODE 3 AT Q5: You said that you are paid for a fixed number of hours even if it takes you longer to deliver your parcels.*

Please can you write in how much you are paid and how long the block of time is, or your hourly rate and number of hours?

For example: £40 per 3 hour shift or £12 per hour for 4 hrs.
- Q9 *ASK THOSE WHO CODE 4 AT Q5: You said that you are paid another way.*
Can you please write in how much you are paid per shift or unit and how this is calculated? (e.g. time/number of parcels/miles or a combination of these)?
- Q10 *ASK ALL: How much do you typically receive in a monthly or weekly payslip?*

Please write in e.g. £315 per week or £1200 per month.
- Q11 *ASK ALL: Are there any additional bonuses or rewards offered by [INSERT MAIN PARCEL DELIVERY COMPANY NAME] for exceeding the required targets or standards? For example, for delivering more parcels than required per shift or for completing your route more quickly.*

Yes	1
No	2
Don't know	3

Q12 *ASK THOSE WITH BONUSES/REWARDS (CODE 1 in Q12)*: How much are these bonuses or rewards and what are they for?

e.g. 5p extra per parcel if route completed at least 30 minutes early

Q13 *ASK ALL*: Are there any penalties that can be charged for not meeting the required targets or standards [*INSERT PARCEL DELIVERY COMPANY NAME*]? For example, for delivering fewer parcels than expected or taking too long to deliver parcels.

Yes	1
No	2
Don't know	3

Q14 *ASK THOSE WITH PENALTIES (CODE 1 IN Q14)*: How much are these penalties/charges and what are they for?

e.g. paid 10p less per hour that day if route takes 30 min or more longer than expected to complete

Working patterns

Q15 *ASK ALL*: On average, how many parcels per day do you deliver? If you are paid different amounts for different sizes of parcels please estimate how many of each type of parcel you deliver on average.

(please answer this question in general if you deliver for more than one company)

WRITE IN:

Q16 *ASK ALL*: On average, how many hours per day do you work?

(please answer this question in general if you deliver for more than one company)

WRITE IN:

Q17 *ASK ALL:* On average, how many days per week do you work?

(please answer this question in general if you deliver for more than one company)

One day	1
Two days	2
Three days	3
Four days	4
Five days	5
Six days	6
Seven days	7

Q18 *ASK THOSE PAID BY HOUR OR BLOCK (CODES 1 & 3 FROM Q5):* How many hours, if any, do you work in unpaid overtime per week in order to complete your deliveries? Please write below e.g. 1 hour 30 minutes

WRITE IN:

Additional costs

Q19 *ASK ALL:* On average, what is your weekly mileage?

Please write in below e.g. 150 miles

Q20 *ASK ALL:* On average, how much do you spend on fuel per week?

Please write in below e.g. £100

Q21 *ASK ALL:* Do you have any of the following additional costs?

Vehicle leasing costs	1
Insurance	2
Vehicle maintenance	3
Other vehicle costs	4

Q22 *ASK THOSE WHO CODE '1' AT Q21:* Please write in your vehicle leasing costs and whether this is weekly, monthly, per year or another time period.

e.g. £150 per month

Q23 *ASK THOSE WHO CODE '2' AT Q21:* Please write in your insurance costs and whether this is weekly, monthly, per year or another time period

e.g. £600 per year

Q24 *ASK THOSE WHO CODE '3' AT Q21:* Please write in your vehicle maintenance costs and whether this is weekly, monthly, per year or another time period

e.g. £500 per year

Q25 *ASK THOSE WHO CODE '4' AT Q21:* Please write in your other vehicle costs and whether this is weekly, monthly, per year or another time period

e.g. Vehicle tax £200 per year or Congestion Charge £10 per day

Q26 *ASK ALL:* Do you receive any payment to cover some of these costs in addition to the pay you receive for the deliveries you do?

Yes	1
No	2
Don't know	3

Q27-28 *ASK THOSE WHO RECEIVE PAYMENT (CODE 1 IN Q14a):* Please provide details of how much you receive and what this is for.

How much do you receive? - WRITE IN AMOUNT AND TIMEFRAME:

What do you receive this for? - WRITE IN PURPOSE OF PAYMENT:

Attitudes to your pay and conditions

Q29 Can you estimate how much money you make once all costs are deducted per week/month?

Please move on to the next question if you are not sure.

Q30 *ASK ALL:* How satisfied are you with the following?

	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Not very satisfied	Not at all satisfied
The pay you receive					

Your delivery targets					
The hours you work					
Your running costs to do your work					

Q31 *ASK ALL:* To what extent do you agree or disagree with the following?

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
I feel a lot of time pressure at work					
The pressure to deliver quickly makes it difficult to provide good customer service					

Final questions about you and your work

Q32 *ASK ALL:* Where do you live?

- | | |
|------------------|---|
| England | 1 |
| Wales | 2 |
| Scotland | 3 |
| Northern Ireland | 4 |

Q33 *ASK ALL:* Which of the following best describes your most common parcel delivery route?

- | | |
|--|---|
| Mainly city or large town locations | 1 |
| Mainly residential areas or outskirts of cities or large towns | 2 |
| Mainly rural villages or small towns | 3 |

Q34 *ASK ALL:* Do you mainly have the same route or does it vary?

Mainly have the same route 1

Route varies 2

Q35 *ASK ALL:* What is your gender?

Male 1

Female 2

Other (please specify) 3

Q36 *ASK ALL:* How would you describe your ethnicity?

White 1

Black/Black British 2

Asian/Asian British 3

Mixed/multiple ethnic background 4

Other 5

Q37 *ASK ALL:* Is English your first language?

Yes 1

No 2

Q38 *ASK ALL:* Please record your full name below so the researcher can refer back to your survey responses in the follow-up interview. Citizens Advice will not be given access to the names attached to responses.

WRITE IN:

Q39 *ASK ALL:* Please upload evidence of your pay rates here e.g. payslip, contract, agreed rates
[INSERT UPLOAD TOOL]

A.2 Qualitative interview guide

Delivery driver employment conditions - Depth interview guide (c. 30 mins)

Timing/session	Content
Introduction warm up (5 mins)	● <i>Moderator to explain research:</i> ○ This is independent research for the charity, Citizens Advice, in order to inform their policy and campaigning work ○ This interview is to explore your experiences as a parcel delivery driver in more detail ○ All views are strictly confidential and no one will be identified in the final report ○ Explain audio recording and seek respondent's permission to record ● <i>Participant introduction</i> - First name, age and confirm which parcel delivery company/s currently work for ● <i>Further introductory questions:</i> ○ How long have you worked for your current company/s? Have you worked for any other parcel delivery companies previously? How long have you been a parcel delivery driver in total? ○ Why did you initially decide to do this work? What are the best things about this work? What are the main challenges or things that you would like to change?
Confirm survey data (5 mins)	● In your own words, tell me about how you are paid for your parcel delivery work. <i>Probe as relevant:</i> ○ Hourly/by parcel/by block - how much and whether varies if by parcel ○ Any bonuses/incentive structures and whether personally received any bonuses - what and how much ○ Any penalty structures and whether personally received penalties - what and how much ● In your own words, tell me about the running costs associated with your parcel delivery work. <i>Probe as relevant:</i> ○ Fuel costs - how much

Timing/session	Content
	○ Vehicle leasing and running costs - how much ○ Other costs - for what and how much ○ Tax that you need to pay - how much, how is it paid ○ Whether any of these costs are subsidised/covered ● How much do you typically receive in your weekly or monthly payslip? If this varies, what is the range and what does this depend on? ● Could you estimate your typical pay per week or month after you have accounted for your running costs? ● In your own words, tell me about your working patterns. <i>Probe as relevant:</i> ○ How many parcels delivered per day ○ How many hours per day worked ○ How many days per week worked ● Do you regularly work unpaid hours and, if so, how many? Why do you need to work unpaid hours? <i>Probe as relevant:</i> Loading time, route planning time, redelivering if first delivery failed, generally too many parcels to deliver within shift, generally route too long
Views on pay and conditions (5 mins)	● Overall, how satisfied are you with: ○ The pay you receive ○ Your delivery targets ○ The number of hours you work ○ The shifts you work ○ Your running costs to do the work ● Why do you say that? <i>Probe fully responses to each attribute</i> ● How easy or difficult is it to cover your essential personal and household costs (e.g. food, housing, energy, other bills) on your current pay? How does this affect you? <i>Probe fully</i> ● How much choice do you currently have over the number of hours you work? How about the specific shifts you take? How does this affect you? <i>Probe fully</i> ● Before you started with your current company/s did you: ○ Compare pay and working conditions across parcel delivery companies? Why/not?

Timing/session	Content
	○ Consider other contract types e.g. direct employment if offered, self-employed plus if not on this type of structure? Why/not? ● Do you have a view now on: ○ Which company/s have the best pay and conditions? ○ Whether it's better to be directly employed, self-employed or self-employed plus? ○ Whether it's better to be paid hourly, by parcel or by block?
Impacts of pay and conditions (10 mins)	● Thinking about your current pay and delivery targets, what impact does this have on you personally, including: ○ How you do your job - <i>probe as relevant for rushing, working long hours, not taking breaks</i> ○ Your health and wellbeing - <i>probe as relevant for contributing to stress and ill-health, increasing risk of accidents</i> ● What impact does your current pay and delivery targets have on customers - <i>probe as relevant for:</i> ○ Leaving 'sorry we missed you' slip when customer is home ○ Leaving parcels unattended ○ Late/rescheduled deliveries ○ Parcel being damaged ○ Delivery to wrong address ○ Parcels being lost ● Have you received any training on how to engage with customers who are disabled and who might take more time to get to the door? If so, what were you trained to do? ● Are disabled customers currently flagged on your delivery ledger? How easy or difficult is it/would it be to allow more time for disabled people to get to the door when you are on your route? Why do you say that? ● Overall, how would you rate the service that it's possible for parcel delivery drivers to provide customers given the pay and conditions provided for this work - from 0/ terrible to 10/fantastic? Why do you say that? ● What would need to change to enable delivery drivers to provide better customer service? <i>Probe as relevant:</i> ○ Higher pay rates generally

Timing/session	Content
	○ Different pay models e.g. hourly rate rather than per parcel or block ○ Different employment models e.g. directly employed or self-employed plus ○ Pay that covers running costs ○ Lower targets ○ Better routes ○ Better training