

Instant delivery workers in Nantes Survey report

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INTRODUCTION

In recent years, an 'instant delivery'¹ activity has developed in large cities through platforms like Deliveroo or Glovo. If fast delivery services for letters, parcels, or meals have existed for many decades, it is now a new type of activity based on technology and linked to the development of algorithms, smartphones and self-employed workers. By instant delivery, we mean a delivery made in less than two hours following the notification of the order and interfaced by platforms of connection. The delivery workers we study are intermediaries between a shipper (a restaurant, a supermarket, a company of any type) and a recipient of a good. Goods are often prepared meals, but not exclusively, since grocery fast delivery has become increasingly important, especially since the beginning of the COVID-19 pandemic. Many on-demand instant delivery platforms now (such as UberEats) also deliver grocery and some platforms like Stuart also make parcel deliveries.

These activities recruit few employees; they are mostly self-employed delivery drivers, most of them self-entrepreneurs (or micro-entrepreneurs, the terms in France being equivalent). The model is meant to be flexible, offering delivery workers a certain degree of autonomy, which is nevertheless not without a precariousness that is increasingly being denounced. The new platforms such as Gorillas or Cajoo, which specialize in ultra-fast grocery delivery, have chosen to hire employees, in part because the legal and image problems of their predecessors (UberEats, Deliveroo) seemed to be detrimental to their development and their attractiveness to investors.

Although instant deliveries are rarely profitable at the moment, they are successful with consumers, allowing them to easily access a wide variety of products at any time without having to travel. This success has been greatly accelerated by the COVID-19 pandemic.

There are only few data available to identify the reality of this 'gig economy' activity of instant delivery, apart from those provided by the platforms themselves from online surveys that only reach their delivery service providers who volunteer to answer them (which is therefore subject to significant bias). Our study therefore aims to produce objective and quantified data on the profile and activity of platform delivery drivers, in order to better understand this phenomenon. It is built on the model of surveys already conducted on the subject in Paris in 2016, 2018, 2020 and 2021².

This survey is carried out within the framework of the SUBWORK project (2020-2022, Productive Cities program of the PUCA³). The SUBWORK project analyzes the multiple dynamics of manufacturing and logistics jobs and workspaces in cities and aims to identify the effects of transformations in workspaces on the poor in central neighborhoods. Understanding the spatial dynamics of new modes of work such as self-employment in the logistics and delivery sector, which is the subject of this investigation, contributes to understanding the current invisibility of the working class in large cities.

¹ See DABLANC, L., MORGANTI, E., ARVIDSSON, N., WOXENIUS, J., BROWNE, M., SAIDI, N. (2017), The Rise of On-Demand 'Instant Deliveries' in European Cities, Supply Chain Forum: an International Journal, vol. 18, 4, pp. 203-217.

² See for example the 2021 survey: <https://www.lvmt.fr/wp-content/uploads/2021/04/Livreurs-2021.pdf>

³ Nicolas Raimbault, University of Nantes (<http://www.urbanisme-puca.gouv.fr/subwork-les-espaces-suburbains-de-production-quels-a2207.html>).

METHODOLOGY

This study is based on a quantitative survey by questionnaire, conducted face-to-face with delivery drivers of instant delivery platforms in Nantes in September 2021.

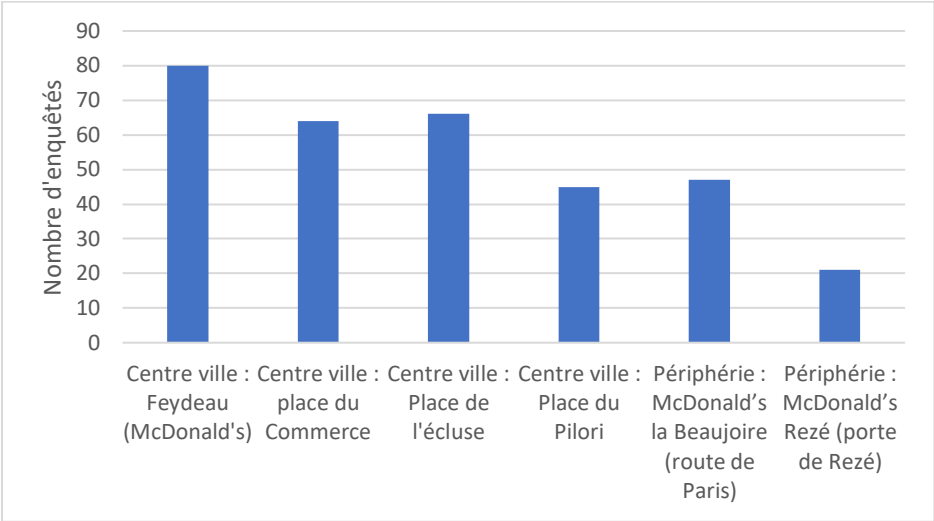
The chosen method (which is the one already used since 2016 by University Gustave Eiffel for Paris instant delivery workers surveys) is the "random" but systematic meeting (each person met, ideally, must answer: the interviewer is invited not to give up too quickly if a respondent is reluctant) in the field. This method avoids the biases of online surveys, distributed in particular on social networks, to which only the delivery workers motivated to testify respond. It is not possible to proceed by sampling because of the absence of an objective database on the profile of delivery workers. The MV2 polling firm conducted the survey, with a target of 300 respondents and an actual number of 323 respondents. Survey hours were defined to correspond to the peak hours of activity of delivery demand, and therefore to facilitate the recruitment of respondents, i.e. meal times (11:30 a.m. - 2:30 p.m. and 6:30 p.m. - 9:30 p.m.). The interviewers were instructed to target delivery drivers on bicycles or motorized two-wheelers (mopeds, motorcycles) or in personal cars who could be identified by their delivery equipment: bag and in particular the emblematic refrigerated bags, in the colors of a delivery platform such as Deliveroo or Uber Eats, but also of other brands (Picard frozen products, etc.), as delivery workers can use the equipment of their choice. There is a risk of selection bias here, as delivery drivers by car may be left out, due to the fact that they spend less time in the public space (outside their car) and that the equipment they use for delivery may not be identifiable if it remains inside the vehicle. Motorized two-wheeler delivery drivers working directly for a single restaurant chain, such as Sushi Shop, were excluded from the target, as the presumption of off-platform work was too strong. The first question served as a filter, asking delivery workers which delivery platforms they worked for.

The interviewers sent out into the field were responsible for entering the responses on a tablet, while the questionnaire was administered face-to-face. Again, there is a risk of selection bias, as delivery drivers who do not have a sufficient command of French cannot be surveyed, and also of bias in the administration of the questionnaire, as respondents may have misunderstood some of the questions and provided incorrect or vague answers.

The questionnaire, mostly composed of closed questions, includes questions on the profile of the respondents, factual questions on the delivery activity, and finally opinion questions that allow us to identify the respondents' feelings. The questionnaire includes several questions identical to those used in the Paris surveys, allowing for comparison.

More than three hundred delivery personnel were interviewed at various points in the city of Nantes and its suburban areas (see Figure 1).

Figure 1. Survey spots in Nantes and surroundings

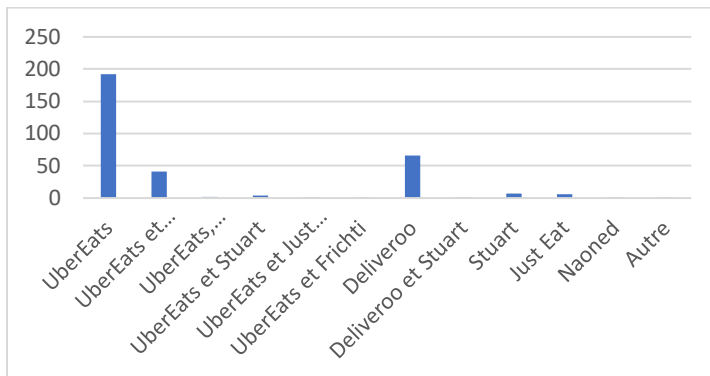


RESULTS

Gender: 98% men

Women	6	1,9%
Men	317	98,1%
	323	100,0%

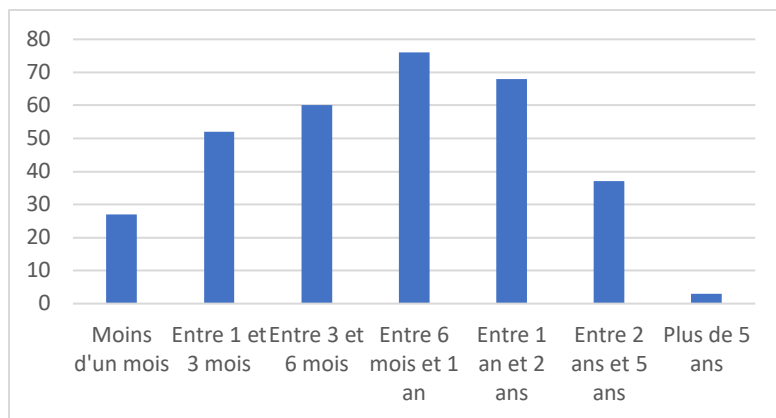
For which platform do you work? Mostly for UberEats (60%)



UberEats	192	59,4%
UberEats and Deliveroo	41	12,7%
UberEats, Deliveroo and Stuart	2	0,6%
UberEats and Stuart	4	1,2%
UberEats and Just Eat	1	0,3%
UberEats and Frichti	1	0,3%
Deliveroo	66	20,4%
Deliveroo and Stuart	1	0,3%
Stuart	7	2,2%
Just Eat	6	1,9%
Naoned	1	0,3%
Other	1	0,3%
	323	100,0%

Only 14% work for two (or more) platforms. This practice had, according to the Paris surveys, developed a little in the years 2016-2018 but has apparently decreased.

For how long have you been working for instant delivery platforms? Two-thirds have worked for one year or less



Less than a month	27	8,4%
1 to 3 months	52	16,1%
3 to 6 months	60	18,6%
6 months to one year	76	23,5%
1 to 2 years	68	21,1%
2 to 5 years	37	11,5%
More than 5 years	3	0,9%
	323	100,0%

What is your work status? 91% are self-entrepreneurs

Are you a self-entrepreneur?

Yes	294	91,0%
No	26	8,0%
Does not know	3	0,9%
	323	100,0%

For those that are not:

Full time employees	4	13,8%
Part time employees	7	24,1%
Member of a cooperative	3	10,3%
No status, doesn't know	15	51,7%
	29	100,0%

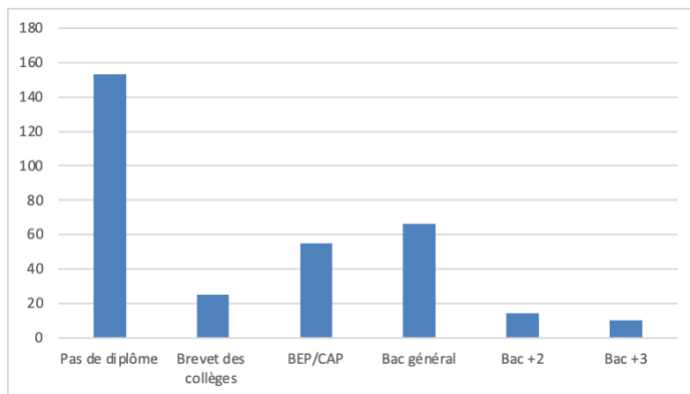
Do you have a job in addition to delivering?

Yes	46	14,2%
No	276	85,4%
DNK	1	0,3%
	323	100,0%

Are you a student in addition to delivering?

Yes	48	14,9%
No	275	85,1%
	323	100,0%

What are your school diplomas? Only 20% have finished high school

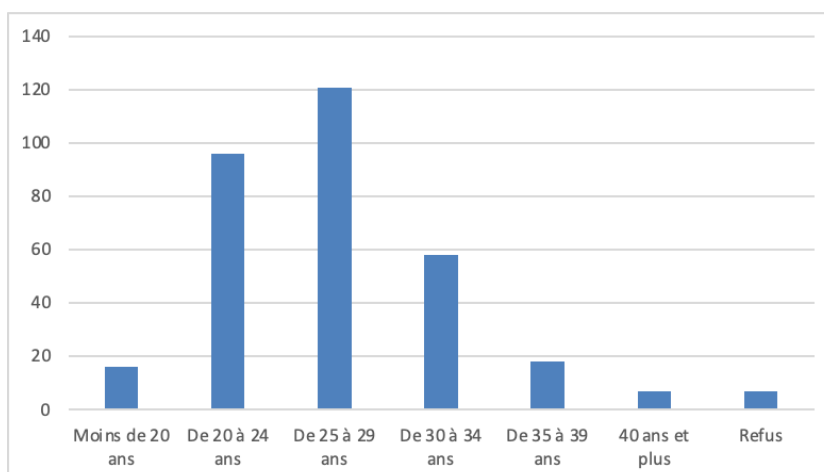


No diploma	153	47,4%
Junior high school	25	7,7%
BEP/CAP	55	17,0%
High school		
baccalaureat	66	20,4%
Two year college	14	4,3%
Three year college	10	3,1%
	323	100,0%

Do you have a domestic freight transport licence⁴? A rather high number (28.5%) mention that have the freight licence, autorising them to use a motorized vehicle

Yes	92	28.5%
No	208	64.4%
DNK	23	7.1%
	323	100.0%

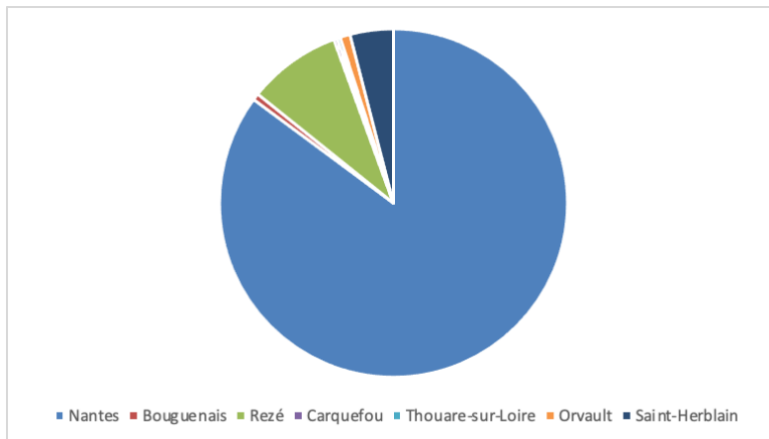
How old are you?



⁴ Compulsory to delivery providers for the use of vans, motorbikes, mopeds or cars (article R3211-12 of French code of transports).

20 or less	16	5,0%
20 to 24	96	29,7%
25 to 29	121	37,5%
30 to 34	58	18,0%
35 to 39	18	5,6%
40 and more	7	2,2%
Doesn't want to answer	7	2,2%
	323	100,0%

In which municipality do you live?

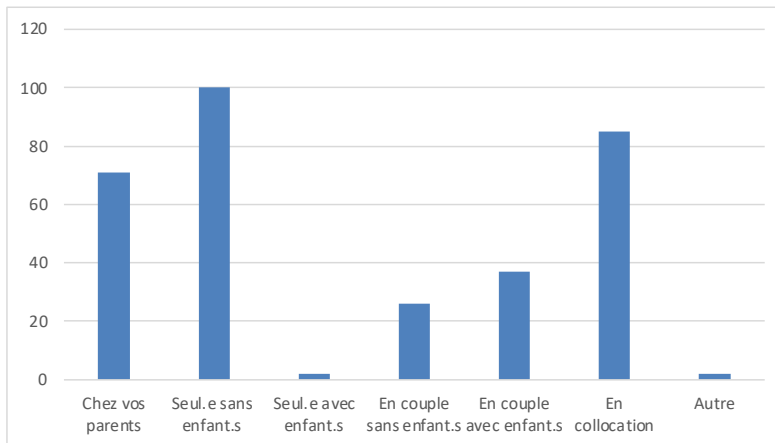


Nantes	275	85,1%
Bouguenais	2	0,6%
Rezé	28	8,7%
Carquefou	1	0,3%
Thouare-sur-Loire	1	0,3%
Orvault	3	0,9%
Saint-Herblain	13	4,0%
	323	100,0%

If in Nantes, in which neighborhood?

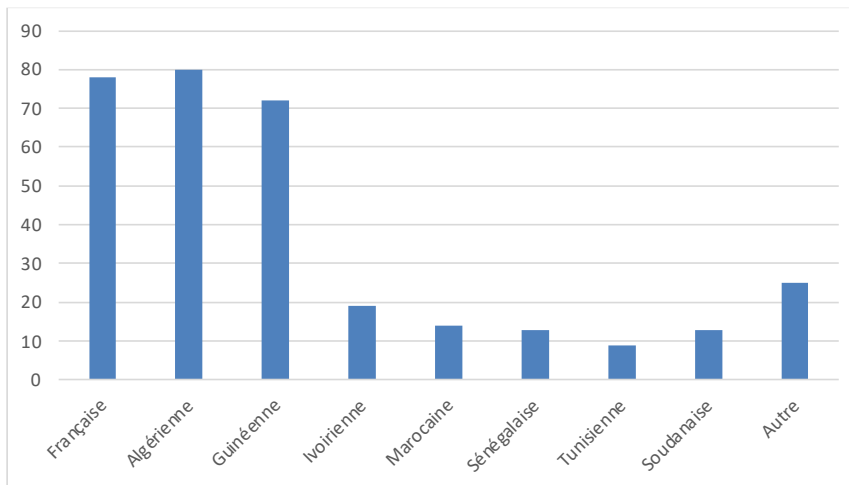
City center	66	24,9%
Bellevue	21	7,9%
Chantenay - Saint-Anne	6	2,3%
Dervallières	17	6,4%
Zola	8	3,0%
Hauts Pavés - Saint-Félix	12	4,5%
Malakoff	20	7,5%
Saint-Donatien	4	1,5%
Île de Nantes	28	10,6%
Breil	15	5,7%
Barberie	5	1,9%
Nantes Nord	22	8,3%
Nantes Erdre	7	2,6%
Doulon	12	4,5%
Bottière	18	6,8%
Nantes Sud	4	1,5%
	265	100,0%

Who do you live with?



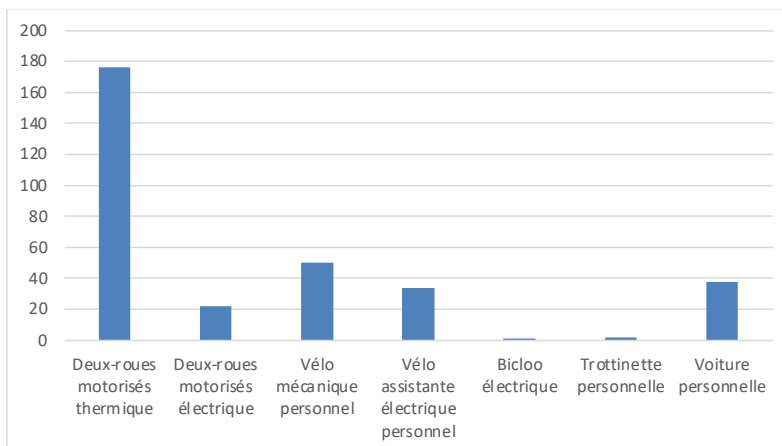
With parents	71	22,0%
By themselves no kids	100	31,0%
By themselves with kids	2	0,6%
With a partner no kid	26	8,0%
With a partner with kids	37	11,5%
With roomates	85	26,3%
Other	2	0,6%
	323	100,0%

What is your nationality? In majority, they are Algerians, French and Guineans



France	78	24,1%
Algeria	80	24,8%
Guinea	72	22,3%
Ivory Coast	19	5,9%
Morocco	14	4,3%
Senegal	13	4,0%
Tunisia	9	2,8%
Sudan	13	4,0%
Other	25	7,7%
	323	100,0%

What mode of transport do you use for deliveries? More than 60% use a motorized two-wheeler

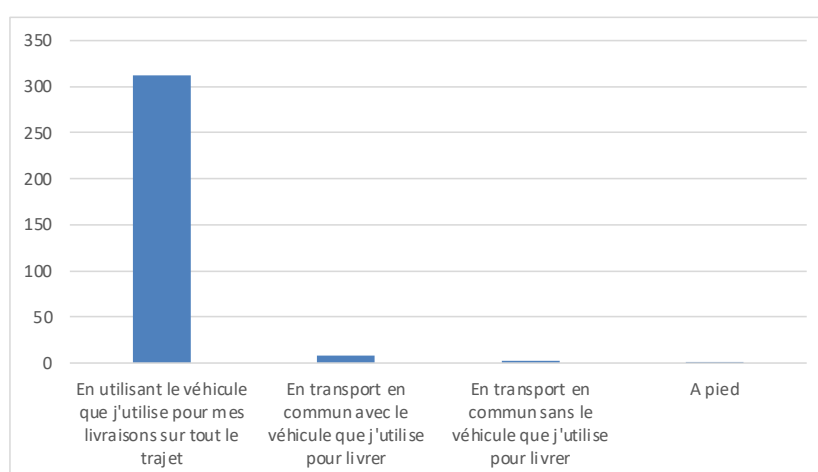


Non-electric moped	176	54,5%
Electric moped	22	6,8%
Personal non electrically assisted bicycle	50	15,5%
Personal electrically assisted bicycle	34	10,5%
Electric Bicloo	1	0,3%
Personal scooter	2	0,6%
Personal car	38	11,8%
	323	100,0%

The use of the car, which already reaches 12% in the survey, is probably underestimated, because of the way in which the respondents were met (see Methodology).

More than 73% of delivery drivers use a motorized vehicle, but only 28% (see question 8) have a domestic transport license, which is mandatory for the use of a motorized delivery mode.

What mode of transport do you use to go to work? In most cases, the same mode as the one for delivering



Using the same vehicle I use for delivering	312	96,6%
Using public transport, with the vehicle I use for delivering	8	2,5%
Using public transport, without the vehicle I use for delivering	2	0,6%
By foot	1	0,3%
	323	100,0%

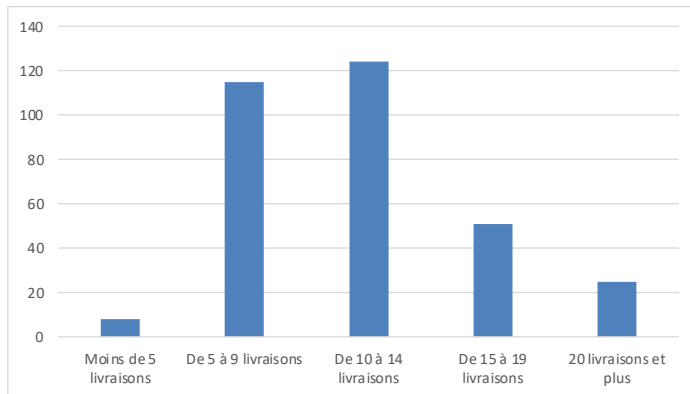
Are you impacted by the ban on motorized two-wheelers in the city center of Nantes?

Yes	155	48,0%
No	129	39,9%
Not involved	33	10,2%
DNK	6	1,9%
	323	100,0%

Have you received a fine because of that regulation?

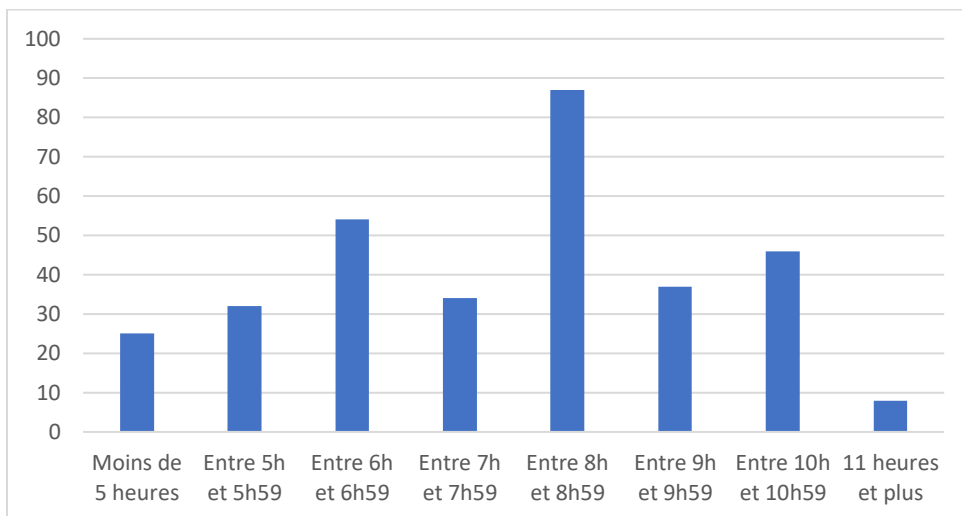
Yes	60	18,6%
No	236	73,1%
DNK	27	8,4%
	323	100,0%

How many deliveries do you make per day? Between 5 and 14 for most



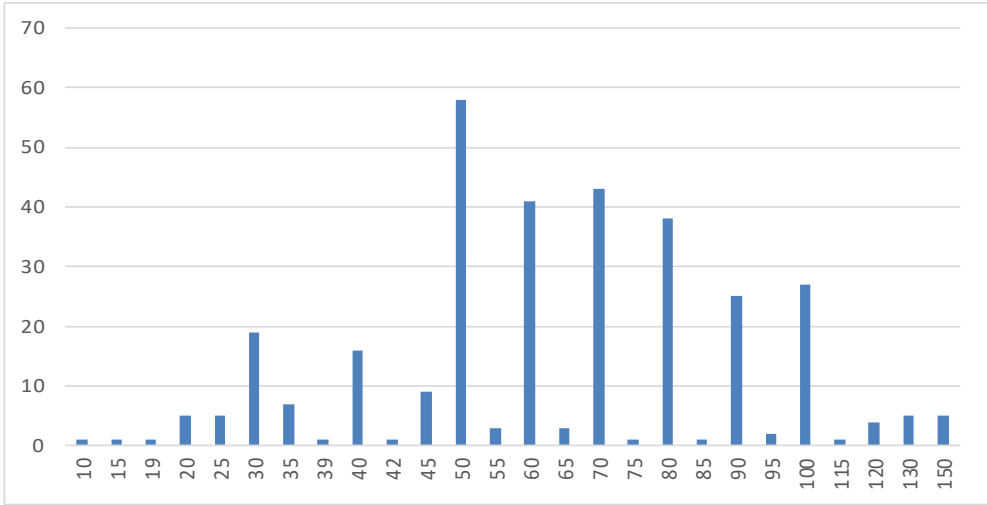
Less than 5 deliveries	8	2,5%
5 to 9 deliveries	115	35,6%
10 to 14 deliveries	124	38,4%
15 to 19 deliveries	51	15,8%
20 deliveries and more	25	7,7%
	323	100,0%

The days you are delivering, how many hours to you work?



Less than 5h	25	7,7%
5h to 5h59	32	9,9%
6h to 6h59	54	16,7%
7h to 7h59	34	10,5%
8h to 8h59	87	26,9%
9h to 9h59	37	11,5%
10h to 10h59	46	14,2%
11h and more	8	2,5%
	323	100,0%

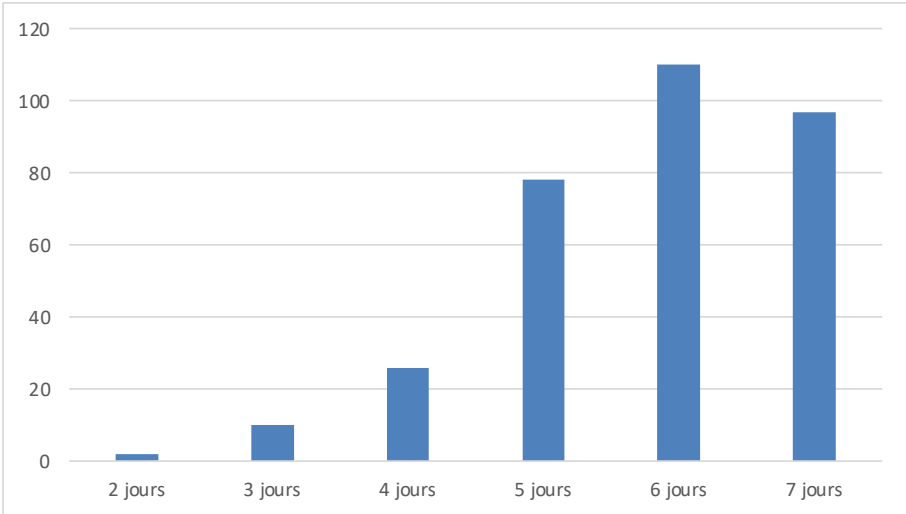
How many kilometers do you ride every day? 66 km in average



Less than 20 km	3	0,9%
20 to 29 km	10	3,1%
30 to 39 km	27	8,4%
40 to 49 km	26	8,0%
50 to 59 km	61	18,9%
60 to 69 km	44	13,6%
70 to 79 km	44	13,6%
80 to 89 km	39	12,1%
90 to 99 km	27	8,4%
100 km and more	42	13,0%
	323	100,0%

Average 65.9 km

Number of days you work in a week: 30% of them work every day (7/7)



2 days	2	0,6%
3 days	10	3,1%
4 days	26	24,1%
5 days	78	24,1%
6 days	110	34,1%
7 days	97	30,0%
	323	100,0%

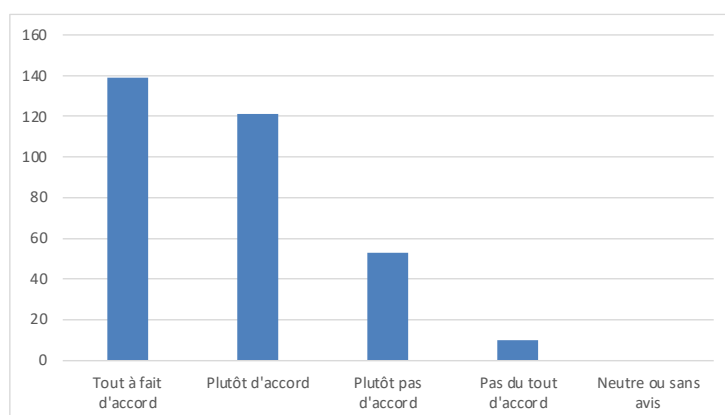
Have you already let someone else use your account?

Yes	15	4,6%
No	299	92,6%
DNK	9	2,8%
	323	100,0%

Have you already used the account of another person?

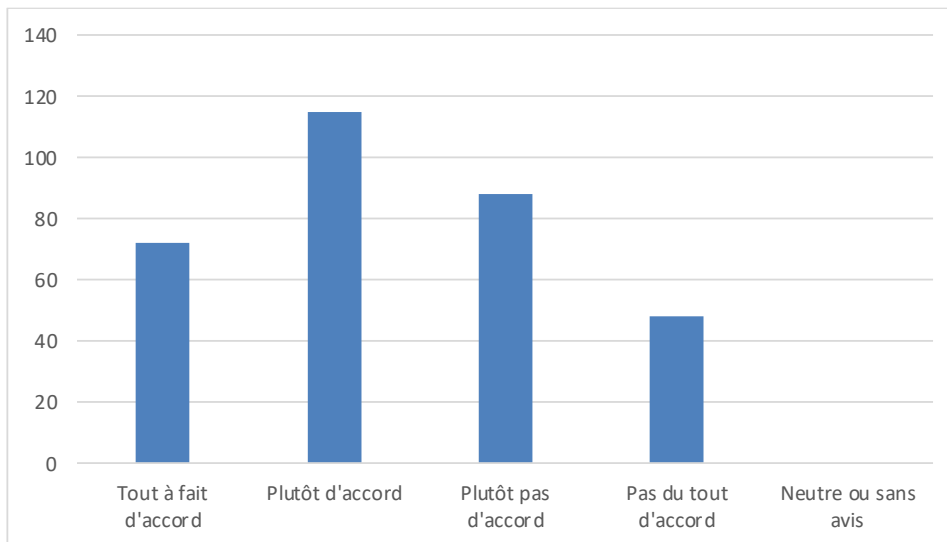
Yes	18	5,6%
No	293	90,7%
DNK	12	3,7%
	323	100,0%

Do you agree with the following: 'weather conditions are difficult'



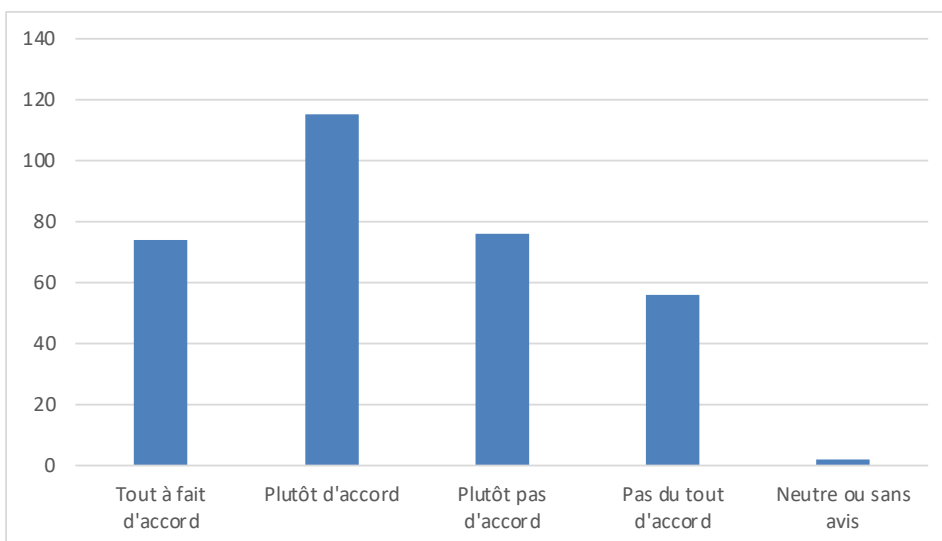
Absolutely	139	43,0%
Rather	121	37,5%
Rather not	53	16,4%
Not at all	10	3,1%
Neutral or no idea	0	0,0%
	323	100,0%

Do you agree with the following: 'this job is too difficult physically'?



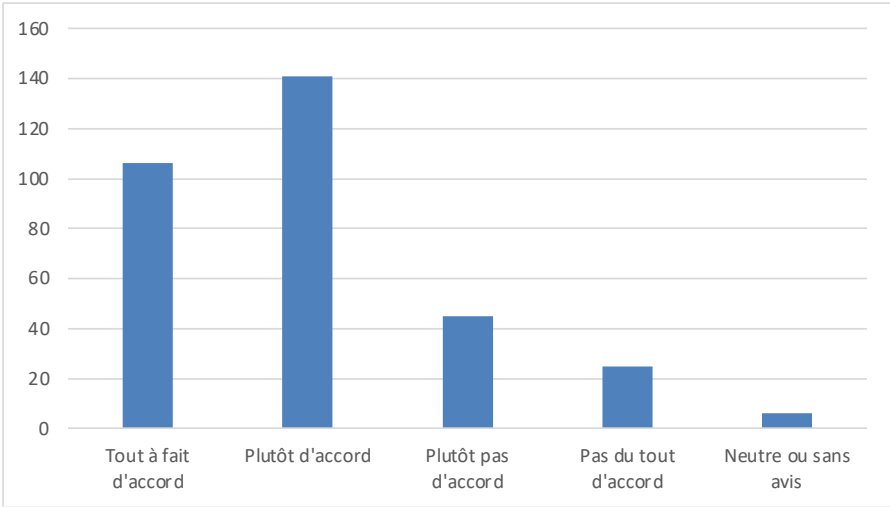
Absolutely	72	22,3%
Rather	115	35,6%
Rather not	88	27,2%
Not at all	48	14,9%
Neutral or no idea	0	0,0%
	323	100,0%

Do you agree with the following: 'this job is too difficult in terms of times of work'?



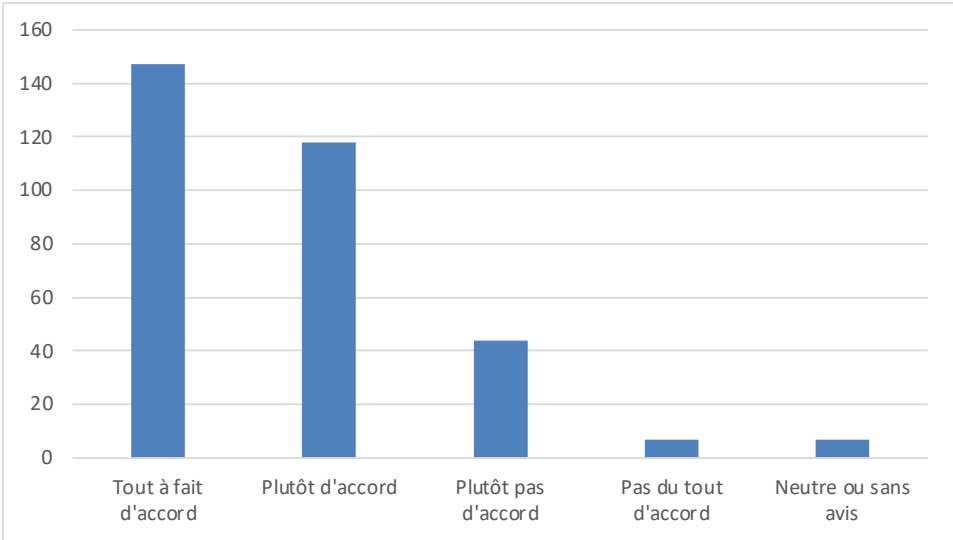
Absolutely	74	22,9%
Rather	115	35,6%
Rather not	76	23,5%
Not at all	56	17,3%
Neutral or no idea	2	0,6%
	323	100,0%

Do you agree with the following: 'there is a high risk of accident'?



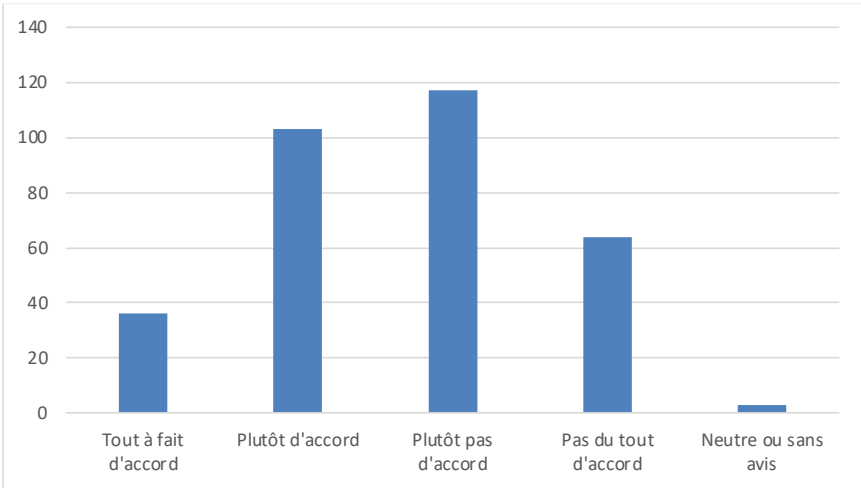
Absolutely	106	32,8%
Rather	141	43,7%
Rather not	45	13,9%
Not at all	25	7,7%
Neutral or no idea	6	1,9%
	323	100,0%

Do you agree with the following: 'there are too many delivery workers relative to the number of delivery gigs available'?



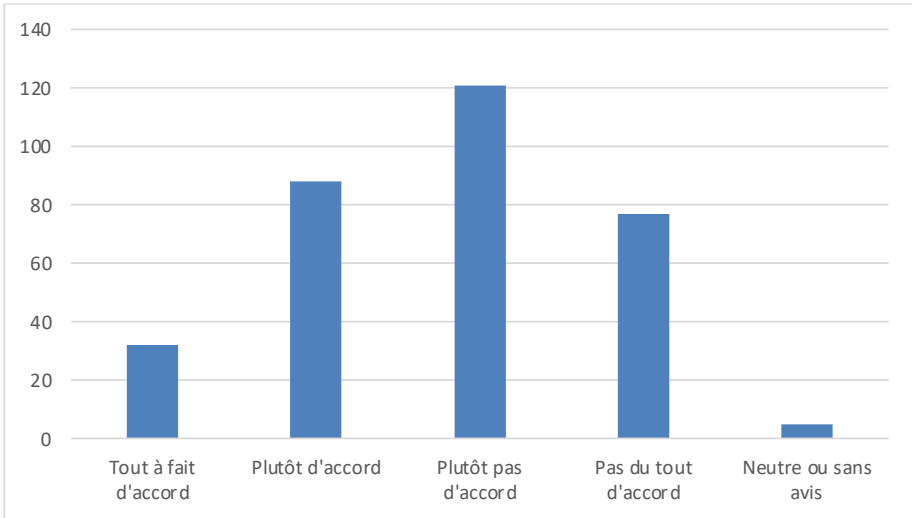
Absolutely	147	45,5%
Rather	118	36,5%
Rather not	44	13,6%
Not at all	7	2,2%
Neutral or no idea	7	2,2%
	323	100,0%

Do you agree with the following: 'relationships with delivery platforms are difficult'?



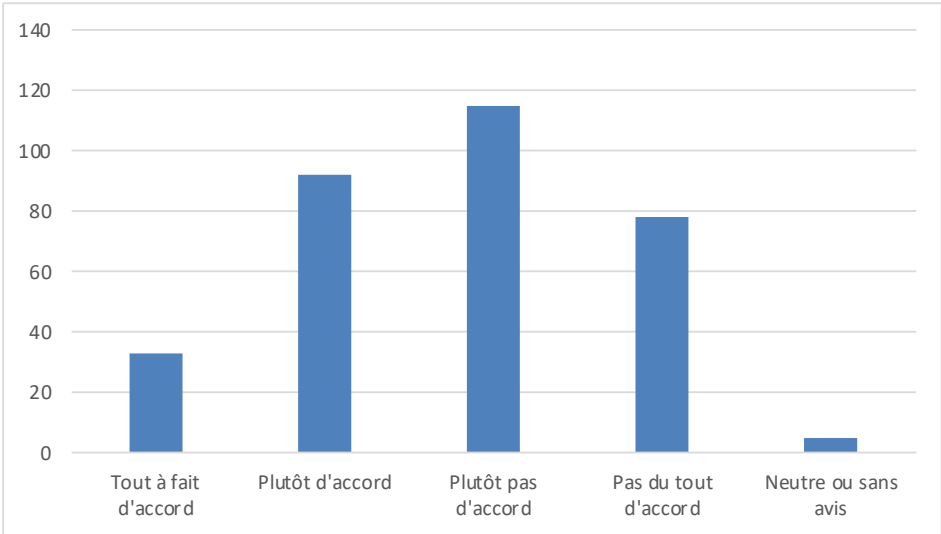
Absolutely	36	11,1%
Rather	103	31,9%
Rather not	117	36,2%
Not at all	64	19,8%
Neutral or no idea	3	0,9%
	323	100,0%

Do you agree with the following: 'relationships with restaurant owners are difficult'?



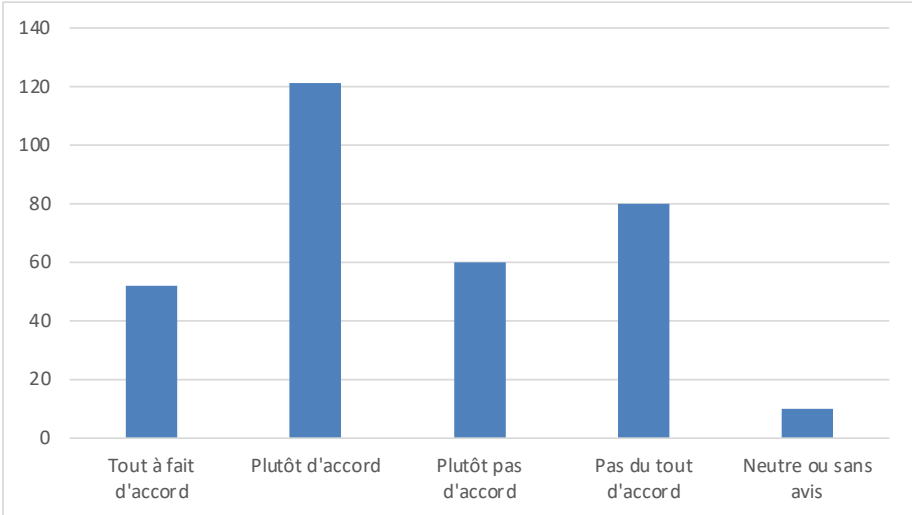
Absolutely	32	9,9%
Rather	88	27,2%
Rather not	121	37,5%
Not at all	77	23,8%
Neutral or no idea	5	1,5%
	323	100,0%

Do you agree with the following: 'relationships with consumers are difficult'?



Absolutely	33	10,2%
Rather	92	28,5%
Rather not	115	35,6%
Not at all	78	24,1%
Neutral or no idea	5	1,5%
	323	100,0%

Do you agree with the following: 'I can't find another job'?



Absolutely	52	16,1%
Rather	121	37,5%
Rather not	60	18,6%
Not at all	80	24,8%
Neutral or no idea	10	3,1%
	323	100,0%

Do you agree with the following: 'I like to be my own boss'?

Absolutely	194	60,1%
Rather	108	33,4%
Rather not	12	3,7%
Not at all	2	0,6%
Neutral or no idea	7	2,2%
	323	100,0%

Do you agree with the following: 'I am happy with what I earn'?

Absolutely	41	12,7%
Rather	138	42,7%
Rather not	94	29,1%
Not at all	47	14,6%
Neutral or no idea	3	0,9%
	323	100,0%

Do you agree with the following: 'I like to work whenever I want'?

Absolutely	194	60,1%
Rather	115	35,6%
Rather not	10	3,1%
Not at all	2	0,6%
Neutral or no idea	2	0,6%
	323	100,0%

Do you see yourself a delivery provider in a year?

Absolutely	45	13,9%
Rather	134	41,5%
Rather not	49	15,2%
Not at all	36	11,1%
Neutral or no idea	59	18,3%
	323	100,0%

Do you see yourself a delivery provider in three months?

Absolutely	143	44,3%
Rather	135	41,8%
Rather not	24	7,4%
Not at all	4	1,2%
Neutral or no idea	17	5,3%
	323	100,0%

How have you heard about becoming an instant delivery provider?

I responded to a job offer	17	4,9%
I followed advice from Pôle emploi	1	0,3%
I followed advice from a friend /colleague	212	61,3%
I applied on my own	116	33,5%
Other	0	0,0%
	346	100,0%

Is this your first job in France?

Yes	87	26,9%
No	236	73,1%
	323	100,0%

Would you be interested in job opportunities as an employee in the delivery or logistics sector?

Yes	142	44,0%
No	177	54,8%
DNK	4	1,2%
	323	100,0%

Have you ever applied for a job as an employee in the delivery industry?

Yes	43	30,3%
No	99	69,7%
	142	100,0%

Do you know the status of member of a cooperative?

Oui	21	6,5%
Non	281	87,0%
DNK	21	6,5%
	323	100,0%

Are you a member of a union or a group defending labor rights for delivery platform workers?

Yes	12	3,7%
No	308	95,4%
DNK	3	0,9%
	323	100,0%

Would you be interested in becoming a member of a union or a group defending labor rights for delivery platform workers?

Yes	62	19.9%
No	243	78.1%
DNK	6	1.9%
	311	100.0%

Have you participated in one of the strikes about instant delivery in 2020 or 2021?

Yes	60	18,6%
No	259	80,2%
DNK	4	1,2%
	323	100,0%

If yes, which ones?

November 2020 on delivery earning fees	7	11,7%
March-May 2021 on motorized two-wheelers ban in center	36	60,0%
Both	17	28,3%
	60	100,0%

Have you ever had an accident while working as a delivery driver?

Yes	96	29,7%
No	227	70,3%
	323	100,0%

Has the pandemic contributed to making you choose to become a delivery platform service provider?

Yes	47	14,6%
No	217	67,2%
Not involved	51	15,8%
DNK	8	2,5%
	323	100,0%

Were you a delivery worker prior to March 2020?

Yes	90	27,9%
No	233	72,1%
	323	100,0%

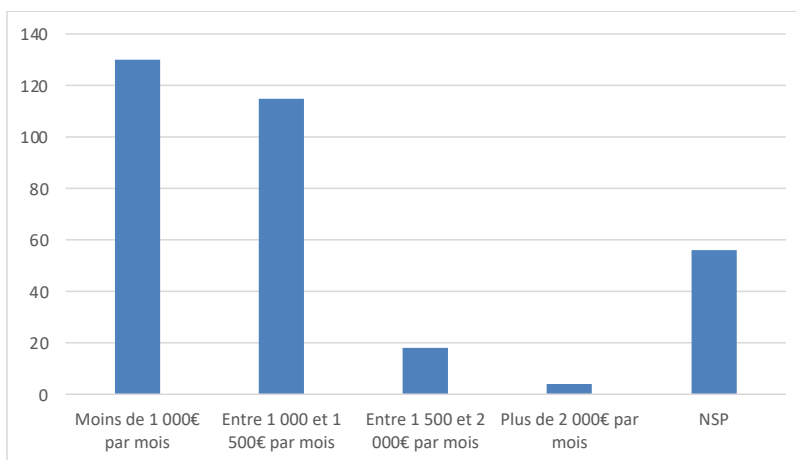
Has the pandemic led to changes in your work as a delivery provider?

Decrease of revenue	33	25,0%
Increase of revenue	17	12,9%
Decrease of number of gigs	8	6,1%
Increase of number of gigs	16	12,1%
Downgrade of working conditions	36	27,3%
Upgrade of working conditions	6	4,5%
Not affected	4	3,0%
DNK	12	9,1%
	132	100,0%

Have the following health measures downgraded your organization as a delivery provider?

Extension of terraces for restaurants	28	25,7%
Organization of waiting lines	15	13,8%
Sanitary pass	20	18,3%
Other	0	0,0%
No downgrading happened	38	34,9%
DNK	8	7,3%
	109	100,0%

What is your monthly revenue from delivering? (Before paying social taxes)



Less than 1 000€ per month	130	40,2%
1 000 to 1 500€ per month	115	35,6%
1 500 to 2 000€ per month	18	5,6%
More than 2 000€ per month	4	1,2%
DNK	56	17,3%
Total	323	100,0%

