



Centre for Research on Islamic and Malay Affairs (RIMA)

Food Delivery Workers Riding the Waves of Uncertainty

By Nabilah Mohammad



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Food Delivery Workers: Riding the Waves of Uncertainty

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About the Publisher

AMP Singapore

AMP Singapore was established on 10 October 1991, as an important resolution of the First National Convention of Singapore Malay/Muslim Professionals held on 6 and 7 October 1990. The Convention was attended by 500 Malay/Muslim professionals who met to brainstorm new directions for the community. AMP was formed with core programmes in education, human resource development, social development and research. AMP is a registered charitable organisation and is accorded the status of an Institution of Public Character. AMP is guided by its core principles of being independent, non-partisan and working in critical collaboration with all parties who share its mission to bring about a Dynamic Muslim Community in the 21st Century. AMP will partner with any individual or organisation who identifies with and supports its mission in society and will support government policies that serve to advance the community and the interest of the people at large.

Centre for Research on Islamic and Malay Affairs (RIMA)

As a research subsidiary of AMP, the Centre for Research on Islamic and Malay Affairs (RIMA) conducts research in key areas such as economics, education, religion, family, social integration, and leadership and civil society. RIMA contributes to scholarly discourses on numerous issues relevant to the community. They organise conferences and seminars to add depth to discourses and to create awareness of issues. Roundtable and focus group discussions are also held to foster greater understanding of issues and keep abreast of emerging trends. RIMA has produced several publications and contributed articles to both print and online media.

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Executive Summary

For several years, the gig economy, specifically the food delivery sector, has been experiencing a surge in demand as the result of fundamental shifts in consumer behaviour.

The delivery boom has also created massive new employment opportunities that have pulled in a diverse demographic of workers from various backgrounds. Food delivery workers are now part of a growing workforce comprised of contract-for-service workers (workers who have client-contractor relationships instead of one that is between an employer and employee).

While food delivery is not a new concept, the recent developments in food delivery work are unique, as workers are now directed and engaged by digital platforms with limited human interaction and input. The reorganisation of work processes in conjunction with hitherto unprecedented contractual arrangements has resulted in novel work regimes. The traditional framework of full-time stable work is now being challenged by on-demand freelance hire. Thus far, the impact of these developments in Singapore has been subjected to limited empirical investigation.

Food delivery workers are of particular interest because the diversity of demographic, educational and employment status typologies among them are unparalleled when compared to other self-employed occupational categories. As discovered in this study, among these workers are youths, the middle-aged, housewives, retirees, ex-offenders and the disabled. This is made possible due to the low barriers to entry to becoming a food delivery worker. Almost anyone can qualify without going through a selection process. The upfront cost of equipment - bicycles, personal mobility devices (PMDs) and power-assisted bicycles (PABs) - are affordable for many, given the various schemes available to acquire them.

This segment of own-account workers (OAWs) has drawn the most concern. While there is no doubt that the industry has provided many jobs, especially in the delivery sector, there has been concern expressed by food delivery workers about the working conditions they are subjected to, including the limited training many receive and the challenges they experience in the course of their work. The nature of the work does not help them to build skills over time, thus, their longer-term employability is a major concern. The industry itself is fraught with uncertainty. While it is hard to foresee such work being displaced by technology in the near-term, it is worth noting that it all began with a single innovation (i.e., a software application), and

there is no telling if another innovation will render food delivery work redundant.

Food delivery is also largely dependent on market volatility and consumer trends. As the COVID-19 pandemic has demonstrated, a shock can change any industry configuration considerably. While other economic sectors have ground to a standstill, the demand for food delivery business has increased by about 20 to 30 per cent since a ban on public dining kicked in on 7 April 2020 (Toh, 2020). Many out-of-work individuals have thus flocked to this sector for income. While one may argue this is only a temporary reorientation, many consumers who otherwise were not accustomed to using an app to place orders for food have now learnt of its convenience. Likewise, many workers who entered the food delivery business at the height of the pandemic have learnt of its benefits. These experiences are likely to induce lasting changes in consumer and market trends. With a larger number of food delivery workers in the business, their financial health, long-term employability and career progression have become matters that need to be treated with greater urgency.

This study, conducted from September 2019 to August 2020, seeks clarity on the different types of food delivery workers, the reasons why they joined the business, and how they utilise the perks and cope with the perils that come with the job. More importantly, it also expounds on how food delivery workers view their long-term employability and what actions are typically taken to ensure that they do not descend into a vicious cycle of adverse socio-economic outcomes when industry, market, or consumer trends do not work in their favour.

A total of 60 participants from diverse backgrounds participated in the study. In-depth interviews were conducted with participants to explore and understand their concerns. The report begins with the background of the research and the methodology employed. Data and findings are subsequently presented. The report ends with a discussion and recommendations section exploring the way forward and a conclusion section for final thoughts drawn from the data.

Opportunities and Challenges for Food Delivery Workers

There are both “push” and “pull” factors for taking up food delivery work, most notably flexibility, preference for autonomous work arrangements, reliable payment methods and monetary incentives, peer influence, low barriers to entry,

and the convenience of utilising one's free time and personal vehicle.

Many of the participants are the sole breadwinners of their families, and some are ex-offenders who are marginalised due to their criminal records.

When asked how they see their future in the food delivery industry, their responses were mixed. Those who have been in the industry longer have seen incentives declining over time, and are hence less optimistic about how earnings from food delivery work will fare in the long term. However, some felt that the food delivery industry will remain stable. While they acknowledged the possibility of technology displacing their roles, the participants felt that it will be a long time before this happens.

To the question of whether they plan to leave the industry in the near future, the responses were also mixed. While some of the participants who answered in the affirmative are satisfied with their job, others said they would stay as long as the gig is around due to a lack of alternative employment opportunities. For participants who viewed food delivery work as a short-term prospect, the majority saw it as an interim source of income while searching for more permanent employment.

When it comes to challenges, the majority of the participants shared similar concerns. Most of the issues fall under the purview of the food delivery company and/or the workers themselves. In these cases, participants said they experienced difficulties in managing the expectations of customers and merchants, delays in responses from management, changing terms and conditions of incentives, and difficulties in the allocation of deliveries.

Some of the concerns shared by the participants fall under the purview of authorities, such as the lack of flexibility and accessibility for food delivery riders including persons with disabilities, the lack of basic benefits such as medical leave, and the recent restriction on using personal mobility devices (PMDs) on footpaths.

Indeed, food delivery platforms provide flexible income opportunities, helping many platform workers to achieve economic security and greater control over their working hours. For some, it is often the riskier but more lucrative pursuit compared to other available jobs. For others who are desperately seeking immediate income, it can be a lifeline.

However, the rapid adoption of technology and the diverse ways in which people work through these platforms also pose challenges for food delivery workers. Failure to find solutions to ensure good platform work brings increased precarity

and insecurity for workers. It is therefore critical to address these issues to prepare adequately and plan good outcomes for workers in advance.

Recommendations

The following recommendations are made based on findings derived from the in-depth interviews.

1. Food delivery work may not necessarily be bad for all groups. Thus, there is a need to recognise the diversity among the workers, understand their various needs and calibrate intervention measures accordingly.
2. Protect those wanting to remain as self-employed persons (SEP); support those wishing to upgrade.
3. Review CPF arrangements for SEPs as their numbers are expected to grow; make contributions to Ordinary and Special accounts mandatory albeit at a lower rate of contribution compared to full-time permanently employed persons.
4. Social service agencies (SSAs) should reach out to food delivery workers in unconventional ways for dialogues on their future.
5. SSAs can introduce bridging programmes to help those with lower educational qualifications or who find the learning curves too steep.
6. Introduce befriender programmes for ex-offenders who can provide testimonials for those making good progress and undertake advocacy to enhance their employment prospects.
7. Roll out temporary assistance packages for vulnerable groups.
8. Develop financial literacy initiatives targeted at food delivery workers.



Part I: Introduction

Section A: The Sharing Economy

The sharing economy is undoubtedly the most ubiquitous manifestation of the rapid technological change society has been experiencing. In public discourse, the term "sharing economy"—mostly referring to platforms such as home-sharing firm Airbnb and ride-sharing firm Uber—has often been used interchangeably with many other terms: most notably "platform economy", "on-demand economy", and "gig economy" (United Nations, 2020). The term is also inclusive of distributed systems, in which peer-to-peer transactions occur without the intermediation of a third-party institution (Killeen, 2015).

The sharing economy is widely supported in academic literature for providing access over ownership by leveraging the idle capacity of capital in ways that produce economic, environmental, social and practical benefits (Curtis & Lehner, 2019). However, over the past few years, the term "sharing economy" has expanded and morphed to an extraordinary degree (Rinne, 2018), as competitors offering similar services mushroomed across the

globe (Cheng, 2019).

According to Juliet Schor, a professor of sociology at Boston College, most of these platforms were launched with an idealistic discourse (Harbert, 2020). Schor explains that economically, these platforms offer workers more freedom and opportunities to earn income. Socially, these platforms were promoted as enabling person-to-person exchanges which would lead to stronger social connections; environmentally, these platforms would help in reducing carbon emissions (Harbert, 2020). However, according to Schor, the sharing economy was hijacked by investors who began offering the platforms more capital, which created pressure for growth and in turn led to their commercialisation. Economist Walter Theseira of the Singapore University of Social Sciences said that firms such as Uber and its regional rival Grab resorted to business strategies that "completely walked back the original sharing economy concept", and these include providing rental vehicles to drivers without their own pre-existing vehicle and devising

incentive and reward schemes to woo drivers into full time employment. (Cheng, 2019).

The implications of the sharing economy have been hotly debated in the news media. While sharing economy platforms present the potential to improve economic security by allowing people to earn income in new ways, the gig economy goes far beyond this, affecting workers of all ages, expertise levels, and industries (Rinne, 2018). The International Labour Organization (2018) has highlighted several concerns related to the unclear employment status of workers in the platform economy: unfair treatment, low earnings, non-payment, lack of social protection and lack of voice. In addition, the platforms shift much of the risk from the companies to the workers, who are classified as independent contractors rather than employees (Cheng, 2018). Eventually, this will affect people who depend on the gig economy for a living rather than just supplementing their income.

Section B: Growth of the Food Delivery Industry

Food delivery services are not new, but apps and smartphones are expanding the reach of delivery services. The global online food delivery services market is expected to grow from US\$115.07 billion in 2020 to US\$126.91 billion in 2021 and reach US\$192.16 billion in 2025 (The Business Research Company, 2021). Driven by the demand for easier access to food, as the result of fundamental shifts in consumer behaviour, the food delivery business has seen exponential growth in many countries including Singapore.

The food delivery market has exploded in recent years, but it goes back to 2012 when Berlin-based Foodpanda began operations. Soon after, other companies followed suit: London-based Deliveroo began operations in Singapore in 2015, and the now-defunct UberEATS began operations in 2016 before Grab’s food delivery arm GrabFood bought over Uber’s Southeast Asian operations in March 2018.

According to Mastercard, the global gig economy generated US\$204 billion in gross volume in 2018, with transportation-based services (which includes food delivery) comprising 58% of this value. The size of gig economy transactions globally is projected to grow by a 17% compound annual growth rate (CAGR) with a gross volume of US\$455 billion by 2023 (Mastercard & Associates, 2019).

Regionally, the gross merchandise volume of food delivery, which was less than US\$400 million in 2015, surged by almost 15 times in just four years. In Singapore, according to Google Trends, the

number of search queries for online food delivery brands has grown more than seven times from 2015 to 2019. (Chart 1) (Google et al., 2019).

Chart 1: Google Trends for selected Online Food Delivery brands



Source: E-Conomy SEA 2019

Regionally, the ride-hailing market has more than quadrupled in value from US\$3 billion in 2015 to almost US\$13 billion in 2019. Looking to the future, the sector is expected to exceed US\$40 billion in 2025, up from the previously predicted US\$29 billion as a result of the booming food delivery sector (Davis et al., 2019).

Foodpanda reported that it has more than 1.5 million users and 3,500 restaurant partners in Singapore and continues to acquire “thousands” of new customers each day, receive “several tens of thousands” of orders daily, and has a pool of about 3,000 freelance delivery riders, up by 50 per cent since the beginning of 2017 (Teng & Siau, 2018). Deliveroo reported a 70% increase in its revenue in Singapore from S\$26.4 million in 2017 to S\$44.5 million in 2018 (Tan, 2019). Similarly, Grab’s food business in Singapore saw a 25% month-on-month growth between May 2018 and May 2019. Dr Ang Swee Hoon, associate professor of marketing, National University of Singapore Business School, attributed the food delivery industry’s rapid rise to changes in Singaporeans’ lifestyle needs, busier work schedules and higher spending power (Teng & Siau, 2018).

The growth of the food delivery business can also be explained in part by the opportunities such online platforms create for businesses, workers, and customers. They allow businesses to tap workers who are available on-demand to serve customers more flexibly and responsively, thus reducing costs and increasing revenue. They also allow workers to market their skills and provide their services to earn an income under a more flexible working arrangement. The benefit food delivery brings to food businesses, workers and consumers contributed to the rise of the industry, according

to former Minister for Manpower, Mr Lim Swee Say (Ministry of Manpower, 2017). Indeed, given the strong demand for food delivery, it is not surprising that the number of delivery riders in Singapore has significantly increased.

Section C: Employment Status of Food Delivery Workers

The food delivery worker capitalises on the 21st-century drive towards digitalisation. In the case of food delivery work, this means the digital intermediation to commission work, supervise it, and facilitate payment (Stanford, 2017). A salient feature of food delivery work, as is the case with most gig economy work, is that workers supply their own capital equipment (Stanford, 2017). Food delivery workers will have to invest in their own means of transporting orders to customers’ premises, including the maintenance and the loss of income when the transportation means is in disrepair.

While the majority of food delivery workers use either motorcycles or bicycles (Ministry of Transport, 2019), the advent of PMDs lowered the barriers to entry, paving the way for those who cannot afford a motorcycle or find riding a bicycle physically challenging, to take on food delivery work.

There are misconceptions about the relationship between food delivery riders and the food delivery platforms they work for. Some hold the mistaken notion that they are gig economy workers who are employed by the companies that supply the goods or services the workers deliver.

Former Manpower Minister Lim elucidated the distinction between gig workers and freelancers: gig workers can be employees or freelancers. Mr Lim gave the example of a private car driver who joins a transport company with an employment contract and who takes on jobs offered via apps. In such instances, while the driver is in the gig economy, he remains an employee protected by labour laws because there is an employment contract between him and the car rental company, even if he is on a short-term employment contract (Ministry of Transport, 2017). The driver is deemed to be under what is termed contract of service. However, if one provides a service in return for a fee without entering into any employer-employee relationship and is not overly constrained by conditions imposed by the “platform”¹ owner or service buyer, then one is a freelancer under what is termed contract for service.

Given their relationship with the companies that own food delivery platforms, food delivery workers

are actually gig freelancers. Gig freelancers are known as own-account workers (OAWs) in MOM’s labour force surveys and are considered SEPs by the Central Provident Fund (CPF) and Inland Revenue Authority of Singapore (IRAS).

According to former Member of Parliament Zainal Sapari, workers providing services for ride-hailing company Grab and food-delivery service Deliveroo, for example, are not employees but are independent contractors not entitled to statutory and other benefits (Cheng, 2018).

Independent contractors like food delivery workers, are therefore not covered by the Employment Act, and statutory benefits such as working hours and leave benefits do not apply to them. The following table summarises the differences between contract of service and contract for service (Ministry of Manpower, n.d.):

Table 1: Contract of Service vs. Contract for Service

Contract of service	Contract for service
Has an employer-employee relationship	Has a client-contractor type of relationship
Employee does business for the employer	Contractor carries out business on their own account
May be covered by the Employment Act (MOM, 2020b)	Not covered by the Employment Act
Includes terms of employment such as working hours, leave benefits, etc.	Statutory benefits do not apply

Source: Ministry of Manpower, 2020a

In addition, companies who contract services from self-employed individuals under contracts for service are not required to buy insurance for them as there is no employer-employee relationship between them (Ministry of Manpower, 2016). Self-employed delivery riders may choose their own work arrangements such as driving their own vehicles and managing their own working hours. In addition, they can work for multiple delivery platforms.

In this regard, companies do not have full control over the self-employed individuals’ work arrangements and are thus not required to purchase work injury compensation insurance for them as there is no employer-employee relationship between them (Ministry of Manpower, 2019). The companies are also not required to contribute to the workers’ CPF. Nonetheless, a person providing his services under a contract for service is self-employed and has to pay mandatory MediSave contributions if their annual net trade income is more than S\$6,000 (CPF, n.d.).

Demographics of Own-Account Workers

Statistics on independent workers such as the food delivery workers, and the work they do are not readily available. However, the Ministry of Manpower (MOM) tracks a category of what it calls own-account workers, or those who are self-employed and do not employ others. MOM’s data on residents who are in regular own-account work, published in 2017 and which includes both primary (residents who were engaged in own-account work as their primary job) and secondary workers (residents who perform own-account work on the side), provides a breakdown that does not include food delivery workers. In the Others category, there are 91,100 workers in total, out of which 74,100 are primary own-account workers and the remainder are secondary own-account workers (Table 2).

According to the same report, the majority of own-account workers were engaged in own-account work as a preferred choice (Table 3). However, there was an increase in both the proportion and number who engaged in own-account work as a non-preferred choice in 2017. Specifically, among primary own-account workers, the share rose from 19% in 2016 to 23% in 2017. A higher proportion among them were aged 60 and above (31%), or held secondary qualifications and below (67%), compared to a year ago. Majority of primary own-account workers were older (54% were aged 50 and above) or less educated (60% were with non-tertiary qualifications). Some 63% of all own-account workers indicated that they faced challenges, with uncertainty of finding

work (44%) remaining the top concern. Other concerns were related to healthcare (27%) and retirement adequacy (24%).

Until officials start to collect and publish data on independent workers, it will be difficult to study and understand the impact of the gig economy in Singapore. That said, anecdotal evidence suggests that the number of such workers is rising (Cheng, 2018).

Table 2: Residents in Regular Own-Account Work by Selected Characteristics, July 2016 to June 2017

	Resident Own Account Workers					
	Primary		Secondary		Total	
	Number	Share (%)	Number	Share (%)	Number	Share (%)
Total	190,900	85.4	32,600	14.6	223,500	100.0
Sex						
Males	142,600	74.7	16,100	49.5	158,700	71.0
Females	48,300	25.3	16,500	50.5	64,800	29.0
Age (Years)						
15-29	13,400	7.0	3,000	9.1	16,300	7.3
30-39	31,700	16.6	4,900	15.0	36,600	16.4
40-49	42,800	22.4	8,700	26.6	51,500	23.1
50-59	58,900	30.9	5,700	17.6	64,700	28.9
60 & Over	44,000	23.1	10,300	31.7	54,300	24.3
Highest Qualification Attained						
Secondary & Below	95,600	50.1	13,600	41.7	109,200	48.9
Post-Secondary (Non-Tertiary)	19,800	10.4	3,700	11.4	23,500	10.5
Diploma & Professional Qualification	30,200	15.8	7,000	21.3	37,100	16.6
Degree	45,300	23.8	8,300	25.6	53,700	24.0
Occupation (SSOC 2015)						
Taxi Drivers	38,900	20.4	2,500	7.6	41,400	18.5
Working Proprietors	19,100	10.0	2,300	7.0	21,300	9.5
Real Estate Agents	13,400	7.0	2,700	8.4	16,200	7.2
Insurance Sales Agents/Brokers	13,900	7.3	s	4.1	15,300	6.8
Private Hire Car Drivers	12,100	6.4	2,500	7.6	14,600	6.5
Hawkers/Stall Holders	11,200	5.8	s	1.6	11,700	5.2
Private Tutor (Academic)	6,100	3.2	2,600	8.1	8,800	3.9
Media-Related Workers	6,000	3.1	s	3.9	7,200	3.2
Others	74,100	38.8	17,000	52.0	91,100	40.7

Notes:
(1) Figures refer to residents in own account work as a regular form of employment during the reference year.
(2) Private hire car drivers in Table 1 refer to those on online matching platforms (such as Uber and Grab). Including those not on online platforms, there were 12,800 private hire car drivers among primary own account workers, and 2,500 among secondary own account workers, adding to a total of 15,300 private hire car drivers in 2017.
(3) Figures by occupations do not add to the totals as an individual may hold two or more jobs in own account work.
(4) 's': Data suppressed due to small number covered.

Source: Ministry of Manpower, 2017a

Table 3: Residents in Regular Own-Account Work by Preference and Selected Characteristics

	Resident Own Account Workers											
	Primary Own Account Workers						Secondary Own Account Workers					
	Preferred Choice		Non-Preferred Choice		Total		Preferred Choice		Non-Preferred Choice		Total	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Total	147,900	77.5	43,000	22.5	190,900	100.0	28,900	88.6	3,700	11.4	32,600	100.0
Sex												
Males	104,800	70.8	37,800	88.0	142,600	74.7	14,000	48.6	2,100	56.9	16,100	49.5
Females	43,100	29.2	5,200	12.0	48,300	25.3	14,900	51.4	s	43.1	16,500	50.5
Age (Years)												
15-29	11,800	8.0	s	3.6	13,400	7.0	2,900	9.9	s	2.7	3,000	9.1
30-39	27,800	18.8	4,000	9.2	31,700	16.6	4,400	15.3	s	13.2	4,900	15.0
40-49	33,900	22.9	8,900	20.7	42,800	22.4	8,100	27.9	s	16.6	8,700	26.6
50-59	43,600	29.5	15,400	35.8	58,900	30.9	5,100	17.8	s	16.1	5,700	17.6
60 & Over	30,900	20.9	13,100	30.6	44,000	23.1	8,400	29.1	1,900	51.4	10,300	31.7
Highest Qualification Attained												
Secondary & Below	66,600	45.1	28,900	67.4	95,600	50.1	11,200	38.7	2,400	64.7	13,600	41.7
Post-Secondary (Non-Tertiary)	15,700	10.6	4,100	9.5	19,800	10.4	3,300	11.4	s	11.5	3,700	11.4
Diploma & Professional Qualification	26,300	17.8	3,900	9.0	30,200	15.8	6,700	23.1	s	7.5	7,000	21.3
Degree	39,300	26.6	6,100	14.1	45,300	23.8	7,700	26.7	s	16.3	8,300	25.6

Notes:
(1) Figures refer to residents in own account work as a regular form of employment during the reference year.
(2) 's': Data suppressed due to small number covered.

Source: Ministry of Manpower, 2017a

Section D: Requirements and Payment Schemes

To be a delivery rider for any of the three major food delivery companies in Singapore, applicants need to be a Singapore citizen or Permanent Resident, at least 18 years old and have a working smartphone.

To sign up as a food delivery rider, individuals must first apply through the food delivery company website and upload the required documents where indicated. Successful applicants will then be contacted by the companies before applicants activate their food delivery rider account and collect their delivery kit, which includes their uniforms and delivery bags.

The main food delivery companies in Singapore - Foodpanda, GrabFood, and Deliveroo - have different operating models based on work arrangements, payment cycles and incentive schemes. This diversity caters to the different needs of workers, and they can calculate for themselves which of the different models can bring them the most profitable outcome. The pay schemes and structures of the food delivery companies change regularly, so the following information should only be used as a guide. The information provided in this section is current as of 1 October 2020.

Payment Structure and Incentives

GrabFood riders are paid on a per-delivery basis, and the price of the delivery is displayed on the app (Grab, n.d.). The trip fares, which differ by vehicle type, include a base component plus additional distance-based adjustments (refer to Figure 1). The final fare for each trip is shown on the job card when workers receive a delivery job. At the time of the study, GrabFood paid a base of S\$5 per trip and up to S\$10.50 for surcharges depending on location and time.

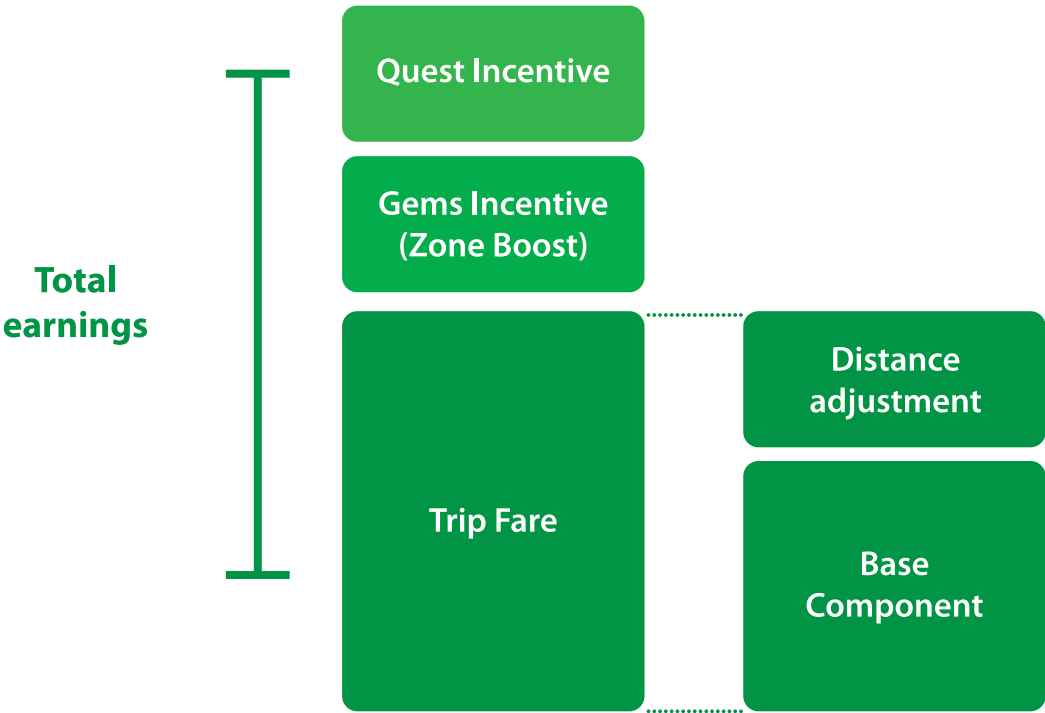
The company also offers incentive schemes to their riders through earning "gems" when riders meet trip targets. These "gems" are tabulated daily and converted to cash. There is a Zone Booster Incentive that is awarded according to the time of a trip is accepted and the merchant's location. Riders can also earn their "gems" through the quest incentives for each order they complete. However, to be eligible for the quest incentives, there is a minimum trip acceptance rate of 90% and a maximum cancellation rate of 10%.

Deliveroo offers a base pay per delivery. Riders also get additional incentives that vary depending on the time and day of each delivery they make (Deliveroo, n.d.). In addition, riders receive more for deliveries that take them further and longer to complete. Deliveroo's mapping system takes the

available routes for every delivery into account. It considers aspects such as the distance, traffic flows, diversions and hills when calculating each delivery fee a rider receives.

Foodpanda, on the other hand, has a more dynamic service pay structure. Their riders are given a score based on several components to determine which batch they are put under; that is to say, riders compete against each other to score points that will allocate them batch numbers with preferential pay rates (Figure 2). Their batch number determines their shift booking and service fee category, with Batch 1 receiving the highest dockets and being the first batch to book their shifts, which translates to an even higher fee per delivery (Foodpanda, n.d.).

Figure 1: Grab Earnings



Source: Grab

Figure 2: Rider's Payment Structure

Motorbike	BP,Yishun & Woodlands	AMK & JW	Others	BT, Far East & Novena	Downtown
Batch 1	\$8	\$8	\$8.5	\$9	\$9.5
Batch 2	\$7.5	\$7.5	\$8	\$8.5	\$9
Batch 3	\$7	\$7	\$7.5	\$8	\$8.5
Batch 4-6	\$6.5	\$6.5	\$7	\$7.5	\$8

Others	BP,Yishun & Woodlands	AMK & JW	Others	BT, Far East & Novena	Downtown
Batch 1	\$7	\$7.5	\$7.5	\$8	\$8.5
Batch 2	\$6.5	\$7	\$7	\$7.5	\$8
Batch 3	\$6	\$6.5	\$6.5	\$7	\$7.5
Batch 4-6	\$5.5	\$6	\$6	\$6.5	\$7

Source: Foodpanda

For instance, motorcycle delivery riders in Batch 1 can expect to earn S\$9.50 for those riding in the downtown area. Thus, if the rider delivers three orders in 1 hour, he can expect to earn a total of S\$28.50 in service fees. On top of this, there is also a quest incentive that rewards riders with cash incentives when they complete a certain amount of orders depending on location and time.

Working Schedule

On top of being paid daily, GrabFood offers the most flexible work schedule out of the three main food delivery platforms in Singapore. There are no fixed shifts given by the company to follow and riders can work as little as 1 hour per day. Thus, delivery workers can decide how much or how little they want to work by logging into the GrabFood Driver app and deliver at a time of their choice as they do not need to book sessions in advance.

Foodpanda riders, on the other hand, have to book their shifts through their Rooster app to make deliveries on the platform. Shifts are always created 1 week in advance and riders can book shifts based on their batch number.

At first, the schedule information for Deliveroo could not be found on its website, so information had to be gathered from study participants. At the time the study interviews were being carried out, Deliveroo were using a shift system under which riders must indicate their preferred shift, which will then be assigned to them if available. Hence, riders are not able to work if they were not assigned a shift. Popular time slots are in high demand, so riders need to have fast fingers to book the slot they want. Participants also shared that there are no minimum working hours but if they work continuously and do more shifts, they will get a higher score that would allow them to be placed in a higher tier. Like Foodpanda, being in a higher tier means riders get to choose their slot first. However, Deliveroo has since changed its system and dispensed with shifts. Riders now have the freedom to deliver orders when and where they like.

Payment Scheme

In terms of payment, a key feature of GrabFood's model is that it pays daily (Grab, n.d.-a). GrabFood delivery workers can instantly cash out their earnings in the Grab Driver app to their bank account at any time up to twice every 24 hours. However, an instant cash out request has a minimum of S\$50 and a maximum of S\$5,000. Notably, Deliveroo also allows riders to immediately cash out their earnings, but charges S\$1 each time a worker does so. Cashing out is however free if done bi-

weekly. Foodpanda delivery workers receive their payments weekly.

Section E: The Ban on Personal Mobility Devices (PMDs)

The use of PMDs is worth mentioning because it has impacted food delivery workers to a significant extent. PMDs came under fire from the public because they were deemed a safety hazard for pedestrians. In November 2019, authorities in Singapore announced an immediate ban on e-scooters on footpaths and increased enforcement actions to catch errant PMD users.

Riders flouting the rules for the first time can be fined up to S\$2,000, or face jail time of up to three months or both (Zhaki Abdullah, 2019). Repeat offenders face fines of up to S\$5,000, or imprisonment of up to six months, or both. The regulation came in as a bid to address public safety concerns after a spate of accidents - some fatal - involving the devices (Alkhatib, 2019).

The ruling galvanised about 7,000 food delivery riders - many of whom depend on the devices (Toh & Wong, 2019) - to turn up in droves at meet-the-people sessions in various constituencies to voice out their frustrations against the ban and plead their case (Ng, 2019). While the share of Deliveroo and Foodpanda riders using e-scooters is less than 30 per cent, Grab said that one-third of its riders would be affected by the new rules (Zhaki Abdullah, 2019).

MP for Marsiling-Yew Tee Ong Teng Koon, who held a dialogue session with delivery riders, said they were angry and felt their livelihood had been taken away "without any warning" as a result of the PMD ban. Mr Ong added that many of these delivery riders were the sole breadwinners of their families, and some were ex-prisoners, marginalised due to their criminal records (Co & Phua, 2020).

Recently, the ban was extended to include other motorised PMDs, such as hoverboards and electric skateboards (Tang, 2020). Personal mobility aids used by people with walking difficulties, such as motorised wheelchairs, however, are exempted from this wider restriction.

Acknowledging the "connectivity loss" that riders face as a result of the ban, now being only able to use the available 440km of cycling lanes - where e-scooters can still be used - compared to the 5,500km of footpaths they previously had access to, 750 new kilometers of cycling lanes are expected to be built by 2025. (Zhaki Abdullah, 2019).

To further cushion the impact on affected riders, authorities announced various measures and schemes. For instance, a S\$7 million grant, co-funded by the government and food delivery companies, was set up to help e-scooter food delivery riders replace their electric scooters (Ministry of Transport, 2019).

Since the 31 December 2019 unnecessary repetition deadline for trade-in grant applications, Deliveroo saw 25 per cent of its delivery riders signing up, while Foodpanda saw 75 per cent of its affected PMD riders signing up (Ong, 2020). Grab partnered with the Land Transport Authority (LTA) to match the subsidy dollar-for-dollar. Eligible applicants for the scheme received up to S\$1,000 for power-assisted bicycles or S\$600 for a normal bicycle. A new training programme to help food delivery riders switch from e-scooters to e-bicycles was also launched, with funding secured for about 2,000 riders in December 2019. In addition, the National Trades Union Congress (NTUC) announced a programme that covers areas such as code of conduct on roads and first aid skills, to help riders who are struggling with the government's e-scooter footpath ban.

The Ministry of Transport (MOT) also added that the NTUC Employment and Employability Institute and Workforce Singapore are working with food delivery companies to provide career services and job-search support under the Adapt and Grow employment-support initiative for food delivery riders who do not wish to continue in the trade (Wong & Cheng, 2019).

Although such elaborate plans were made available to help PMD riders make the switch to bicycles, the potential reimbursement was not attractive to some, such as those who spent a hefty sum for their PMDs and felt the grant would not be enough to cover the full cost of a new e-bike, and those who felt it was dangerous to share the road with other vehicles (Ong, 2020). Some riders said it is physically challenging, tedious and tiring to complete their deliveries on a bicycle. In addition, the switch even resulted in a reduced number of deliveries by certain riders (Elangovan, 2019).



Part II: Methodology

Section A: Objective

The objective of this study is to identify areas for intervention to enhance the long-term employability of food delivery workers, their financial stability and social wellbeing. This includes looking into the challenges of upgrading their skills and whether they can have sufficient savings in their CPF accounts for housing, healthcare, and retirement needs.

Section B: Research Design

A qualitative approach was employed in this study, which was conducted from September 2019 to August 2020. In-depth interviews were used to capture the perceptions, and concerns of and challenges for the participants. The breakdown of the occupations of OAWs or SEPs provided by sources such as the General Household Survey and MOM's Labour Force Survey does not provide specific data on food delivery workers, despite the likelihood that they may constitute a substantial proportion of transportation-based service providers. The public consultations and stakeholder engagement carried out by the Tripartite Workgroup (TWG) focused on SEPs across the skills spectrum.

Our hypothesis is that the demographic diversity of the food delivery workers requires a differentiated slate of policy recommendations, and not a one-size-fits-all approach. Food delivery workers can range from fresh school leavers to working housewives to low income individuals, given the

lower cost of capital equipment required to provide food delivery services and the low barriers of entry (in terms of skills and educational requirements). In the absence of data and comprehensive studies on food delivery workers, it is therefore worth looking through a qualitative lens at the key concerns associated with food delivery workers that have been raised on various platforms such as in Parliament and among community leaders.

Section C: Instruments

This research project used a questionnaire to collect demographic information such as age, gender and income to allow us to better understand the background characteristics of the participants, and a semi-structured, face-to-face in-depth interview that incorporated both open and close-ended questions administered by an interviewing team.

The questionnaire consisted of 21 main questions, each with follow-up questions designed to keep conversations going so that more information could be extracted from them (this study is exploratory in nature). Refer to figure 3 for an example of questions taken from the research instrument.

In practice, the face-to-face interviews lasted between 45 and 90 minutes. The interviews were transcribed verbatim.

Section D: Sampling

A total of 60 food delivery riders, aged between 18 and 57 years old, were recruited for this study. They included individuals who were previously food delivery riders.

All participants were identified through non-probability convenience sampling, which was both purposive and snowball.

Participants were recruited via posters advertising the study placed in public places where food delivery riders were seen congregating. An online version of the poster was also disseminated through social media platforms such as Facebook, WhatsApp and Telegram. Some participants also referred us to other participants.

No participants were deliberately excluded for any reason.

Section E: Scope and Limitations

The small sample size and purposeful selection of participants limited the generality of the results. However, the results may predict what other food delivery riders might say, despite not being intended to be broadly representative. These interviews lend insight into the opinions and experiences, as well as the concerns of and challenges for food delivery workers in Singapore.

Figure 3: Excerpt of Research Instrument

Introduction to Job

1. What are the reasons for being in the food delivery business? Why did you choose to do food delivery?
2. What were you doing before joining the food delivery industry?
 - If working, why did you leave
 - If schooling, why didn't you apply for other jobs or further education
3. What is your general employment type (FT / PT / temporary / casual / contract / others)?
 - if PT, why
4. What is your primary duty as a food delivery rider? What is your typical day like? (Working hours etc)

Section F: Code of Ethics

All participants signed a consent form and received an information sheet informing them of the study's objectives. Before the first interview session, participants were informed of its confidentiality, of their right to withdraw if they did not wish to participate further, and that their identities would remain anonymous. Lastly, they were informed that part of the study's purpose is to articulate their concerns, ideas and hopes in ensuing publications.

A strict code of ethics was applied before, during and after data collection to ensure the anonymity and confidentiality of the participants are guarded. Thus, a code was assigned to each participant, and they were subsequently identified by it. In reports and subsequent publications, only this code will appear, not their names.

Section G: Definitions

For the purpose of this paper, we defined employment statuses as follows:

- **Full-time workers** refer to food delivery workers whose main source of income is from food delivery work. They may hold another job or own a business but the income from the latter two must not exceed or be more regular than the first.
- **Part-time workers** refer to food delivery workers who hold permanent full-time jobs and work as food delivery workers beyond the working hours of those full-time jobs.
- **Casual workers** refer to those who do not do food delivery work regularly (e.g., they do so only several times a week or for only a few hours a day). However, food delivery work is their only source of income.
- **Temporary workers** refer to those who are doing food delivery work full-time but have definite plans to leave the work. This will include those who are waiting for enlistment to National Service, enrolment into an educational institution or to start a new job.
- **Fixed period/contract workers** refer to those who have agreed with their companies to work for a certain period. However, none of our interviewees fell into this category, hence this category of workers was not featured in our analyses.

Section H: Overview of Participants

A total of 60 participants over the age of 18 participated in the study. They were among those who responded to our poster calling for interviewees (refer to Appendix for poster). Physical copies of the poster were placed at locations at different parts of Singapore or were distributed to places where food delivery workers gathered. The poster was also made available online and distributed to chat groups for food delivery workers with permission from their administrators.

For this study, we focused on two categories of food delivery workers; those for whom food delivery work constitutes their primary source of income and those for whom it acts as their secondary source of income. Henceforth, they are known as primary and secondary food delivery workers.

All our participants are Singapore citizens. According to the MOM, it is illegal for foreigners to work as self-employed delivery riders for food delivery platforms. Under the Employment of Foreign Manpower Act, they can be fined up to a maximum of S\$20,000 or subjected to imprisonment of up to two years, or both (Ministry of Manpower, 2019).

Among the 60 participants, 55% were primary income workers while the remainder were secondary income workers. Participants comprised Chinese, Malay and Indian individuals. Malay individuals comprised 60% of the participants, and more than half of them are primary income earners.

Some 35% of the participants are female and of these 11 are housewives or stay-at-home mothers. The rest hold other jobs.

In terms of educational qualifications, 38% of the participants hold at least a diploma or other professional qualification at the time of the study. Of these, almost half are primary income earners. They include participants who graduated with a diploma in aerospace electronics, diploma in mass communication, diploma in culinary arts, and diploma in early childhood. The remaining participants comprised of food delivery riders with primary, secondary and non-tertiary qualifications.

The sample over-represented respondents below the age of 35 and under-represented respondents above 40 years old. Deliberate efforts to target the other age groups improved the spread only slightly as those below 35 years of age were more responsive to our recruitment strategies.

The above notwithstanding, a sample that focuses on the younger segment of food delivery riders offers

insights into the views of Singapore's youth working in this industry. Anecdotal evidence suggests that food delivery riders generally belong to the younger age group (Sin & Tai, 2019). Especially for the young, the appeal of jobs in the food-delivery and ride-hailing industries lies in a variety of factors (i.e., the low barrier to entry, autonomy and flexible working hours). This allows for the temporary or part-time involvement of students and those who hold other jobs concurrently and those who are tiding themselves over while waiting for permanent full-time employment (Baharudin, 2019).

The survey also overrepresented participants working with GrabFood as well as those who are using a PMD as their mode of delivery, and underrepresented participants working for other food delivery platforms including Foodpanda and Deliveroo, as well as those who are using other modes of delivery such as a bicycle, personal mobility aid (PMA) and walking. It is worth noting that some workers delivered food for more than one platform. It is unclear if the terms and conditions of the companies involved permit this.

The majority of respondents used a PMD as their chosen mode of delivery (63%). This distribution, however, is not representative of the actual breakdown of food delivery workers according to modes of delivery, as reported by the Ministry of Transport. However, more PMD riders were interviewed because, given the diversity among them, we found it harder to reach data saturation (i.e. we continued to learn something new from subsequent interviews with PMD riders). ¹ There is a wider diversity of the delivery workers who use PMDs- youths, housewives, single mothers, the middle-aged and more-compared to other modes of transport. Hence, it took more interviews to reach data saturation compared to motorcycle riders, who may actually be the largest constituent group among the entire food delivery rider population.

We asked the participants about the income they received as food delivery workers. In terms of estimated income among participants in the primary income group, about 27% are earning S\$2,000 and above per month, 39% are earning between S\$1,000 and S\$1,499 per month, and about 21% are earning below S\$1,000 per month. We also asked the participants if they were the sole breadwinner in their family. About 36% of the participants in the primary income group said that they are the sole income earner in their family. The rest have other family members who contribute to their household income.

We stopped at 60 participants because of the following reasons:

1. We reached data saturation (i.e., we were not acquiring new information from subsequent interviews).

2. A review of the list of interviewees suggests there is sufficient diversity among them.

3. There were constraints in terms of time (the deadline specified for the project) and funds (interviewees were compensated S\$50 each for time spent on the interview, which averaged about 1 hour. The interviewees had to forego income they could otherwise have earned doing delivery, and the funds allocated for the interviews i.e., S\$3,000, had been used up).

Our sample of participants is not representative of the population of food delivery workers as a whole. That said, given the lack of data about the composition and experiences of this workforce, the research here provides an important, even if non-representative, sketch of this emerging sector.

¹ The ban of e-scooters on footpaths had not taken effect during our interview phase.



Part III: Key Findings

We shortlisted the most pressing issues or concerns based on the following criteria:

- a) The literature review suggests that there are gaps in understanding the phenomenon in question.
- b) The issues have been covered in studies on OAWs or SEPs undertaken by other institutions such as TWG, but which may not have addressed concerns specific to food delivery workers.
- c) These are the areas that have generated the most arresting conversations between the 60 interviewees and the interviewer.
- d) They are issues within the purview and scope of social service agencies like AMP Singapore for which intervention measures such as creating awareness and education can be initiated.

Selected quotes from the interviewees are presented here to give the reader an insight into how they actually responded to the questions or concerns raised. The participant's identity code, along with details of their demographic profile such as age, whether food delivery work constitutes their primary or secondary source of income, and other information, are provided at the end of each quote.

Section A: Reasons for Employment

Flexibility and Autonomy

According to the responses by the majority of the participants, food delivery platforms give them the flexibility to decide when, where and how often to work. Participants said that the per-delivery remuneration system on the platforms provides them a great degree of flexibility as they can sign on and off when they choose, and can work as many or as few hours as they want.

According to the participants, such gig work affords them the flexibility to fit work around their lifestyle and allows them to pursue other activities.

"So, for days that I'm not working or even days where I come back after my shift, I (can choose to) continue (to do food delivery) work. In a way, I am not legally bounded to any contract, like I must work this timing, how long. So, in this case, Grabfood give us the flexibility of choosing when and where, and for how long."

FDRAS10
40, secondary income, Chinese male, married
Broadcast team leader, GCE 'A' Level qualification,
lives in a 4-room flat

"Grab got flexibility, you want to on the app, you on. You want to off the app, you just off. It's really as a free time, extra income, for \$50 a day. It is okay lah."

FDRAS09
35, secondary income, Chinese male, married
Executive officer, Diploma qualification, lives in a 4-room flat

Participants also said that the flexibility allows them to strike a work-life balance and gives them time to attend to their family. Two of the participants who delivered food as a secondary source of income said that such work allows them to fulfil their role as single mothers, while earning additional income during their free time.

"...because it is flexible, so I can do as and when I am free as I am a single parent, and I only can do like certain timings. So, doing food delivery suit my timing ah... I cannot work on weekend[s] because my children are in childcare weekdays, so that is the only free time I can do... The only reason I do food delivery is because, especially my eldest son, is going for speech therapy which is 3 times a week for 2 hours."

FDRNM38
38, secondary income, Malay female,
divorced single mother,
Nitec qualification, lives in a 1-2 room flat

"It is flexible... easy to take care of family and work. I used to work full-time, and I really have no time to cook at home."(Translated from Malay)

FDRNM07
29, primary income, Malay female,
single mother with four children,
PSLE qualification, lives in a 1-2 room flat

Autonomy, another feature of food delivery work, was a factor regularly cited among the participants.

According to the participants, working for food delivery platforms allows them to "be their own boss". Autonomy in this sphere refers to the absence of directional power over working time, working place and execution of tasks. Most of the participants said they have considerable autonomy in deciding when and where to work on any given day. In addition, they are also free to decide how to complete an order, meaning which route to take and how fast to ride. As one food delivery worker described:

"Technically I'm the boss of my own life, so I'm my own boss lah – I work when I want, I stop when I want, and I control the amount of income I get in a month."

FDRNM06
25, primary income, Malay male, single
Diploma qualification, lives in a 4-room flat

Reliable Payment and Monetary Incentives

The immediate availability of the job, and thus income, as opposed to the difficulty in finding permanent full-time employment were also cited as reasons for doing food delivery work. This also applies to those who were retrenched or have low qualifications and found it difficult in getting reemployed, as shared by the following participant.

"I think especially for my qualifications, not much option that we have. Rider job is the easiest to get and most readily available...for the past year I have been trying to apply for customer service jobs, call centre. No calls for interview. It is quite difficult to get a job."

FDRNM17
30, primary income, Malay male, married,
GCE 'O' Level qualification, lives in 1-2 room rental flat

According to the participants, food delivery platforms provide quick, reliable payments. They said this is a strong motivating factor for them, and is great when strapped for cash and in need of a quick financial boost.

"... (the job is) very flexible. (I like) the timing, and, also how their cash withdrawal system works."

FDRNM21
18, secondary income, Malay male
GCE 'N' Level student, lives in a 4-room flat

Many participants who delivered food as a form of secondary income shared that this additional income goes to their savings to fund future plans such as getting married and/or buying a house, and towards daily expenditures for their family.

"...I use this money to spend on my monthly (expenditure), especially my family lah, my father and everyone else." (Translated from a mix of Malay and English)

FDRAS07
22, secondary income, Malay female, Single
Financial consultant, Diploma qualification,
lives in a 1-2 room flat

"...I just want to save as much as possible. For my future. Save up for my renovation, for my house needs in the future... everyday needs also." (Translated from a mix of Malay and English)

FDRAS04
27, secondary income, Malay male, married
Facilities technician, Diploma qualification,
lives in a 4-room flat

One of the participants shared that he is delivering food to pay off debts with moneylenders.

"I was involved in some 'Ah-long' issues and moneylender issues, so in between I managed to clear off things, but I still need extra cash to clear off all the debt and to my bank as well."

FDRAS10
40, secondary income, Chinese male, married
Broadcast team leader, GCE 'A' level qualification,
lives in a 4-room flat

One of the participants whose primary income source was food delivery shared that she earned more as a food delivery worker compared to her previous job as a technician.

"The income (from food delivery work) is higher than my previous full-time job." (Translated from a mix of Malay and English)

FDRNM08
22, primary income, Malay female, single
NITEC qualification, lives in a 1-2 room flat

Peer Influence

Participants were also found to be substantially influenced by their peers about working in food delivery. They shared that they tend to hear positive reviews about the job from friends who are already doing food delivery work.

"Then secondly is also, all my friends, I can safely say 90% of my friends are doing like this dispatch rider, whether it's different companies. So, I see how they work, and I see how they have actually generated some side income which is quite good lah for a side income. So, that's why I choose this." (Translated from a mix of Malay and English)

FDRAS07
22, secondary income, Malay female, single
Financial consultant, Diploma qualification,
lives in a 1-2 room flat

One participant who worked as a packer at a warehouse for three years left his job because he heard that food delivery work pays better. He shared:

"...because some of my friends who are around 24 and 25, they started as a rider under Deliveroo, then they said, in one month, if hardworking, can bring back \$2,000. Then also, got nothing to lose. So just apply and try."

FDRNM33
22, primary income, Malay male, single
Higher NITEC qualification, lives in a 4-room flat

Low Barriers to Entry

Some participants pointed out that food delivery platforms offer an easy first step into paid employment and were a stepping stone to more stable income, especially for the disadvantaged or marginalised, such as those with lower educational qualifications, ex-offenders or persons with disabilities, who found it difficult to land a full-time job.

One of the participants who is an ex-offender shared that landing a decent job has proven tough for him as he faces an invisible wall formed by social stigma and distrust from employers. He was dismissed from his previous job as a courier because of his criminal record. He shared:

"...I was dismissed from my previous courier job because they found out about my criminal record. When I asked them why, they said its trust issues. I was earning about \$2,500 from that job"

FDRNM17
30, primary income, Malay male, married
GCE 'O' Level qualification, lives in a 1-2 room rental flat

Another participant who used a PMD as his mode of transport for food delivery work, shared that he left his previous job after suffering a stroke. According to him, for people with disabilities, a job in the gig economy as a food delivery worker is often one of the few options for them. The low barriers to entry and flexible arrangements enable them to earn a living. He said:

"After I had a stroke, I can't work outside lah. So, when I saw people who have it harder than me... people who are more disabled than me can work as Grab, so I'm excited to be a Grab rider. The problem is that I'm suffering from stroke. When we have a pre-existing illness, although we may be accepted for a job, later when there is medical review, medical test, chances are we may not get the job."

FDRAS02
54, primary income, Malay male, married, disabled,
GCE 'A' Level qualifications, lives in a 5-room flat

Utilising Personal Vehicle and Free Time to Generate Income

There are participants who said that working in food delivery enabled them to occupy their free time. The majority of whom are delivering food as their secondary source of income.

"I got a lot of free time after 5 pm, that's why I signed up for Food Panda."

FDRFA07
31, secondary income, Indian male, married
Mosque operations executive, Diploma qualification,
lives in a 4-room flat

"I need to earn money for my family so it's better to do this part-time rather just I just sit around."

FDRNM04
32, secondary income, Malay male, married
Truck driver, Higher Nitec qualification, lives in a 4-room flat

"... usually like I got nothing to do on the weekends, I can just go and do delivery and earn some cash."

FDRNM23
31, secondary income, Malay female, single
Admin assistant, Diploma qualification, lives in a 3-room flat

Some participants also shared that they are doing food delivery work to fully utilise their personal vehicle by generating income.

"Actually, one of the main reasons why I wanted to do this part-time is because I have a bike, and I feel like there's a need for me to fully utilise my motorcycle."

FDRAS07
22, secondary income, Malay female, single
Financial consultant, Diploma qualification,
lives in a 1-2 room flat

"Actually, I joined (food delivery) mostly because it's very fast money. And also, I have motorbike license, so why not. Then the work is also not so tiring and it's quite flexible."

FDRFA05
26, secondary income, Malay male, single
Diploma student, lives in a 1-2 room flat

Section B: Perceptions of Future Career Prospects

For most, concerns about whether their earnings will be stable over time are mixed. Those who have been in the industry longer have seen incentives decline over time, hence they are less optimistic about how their earnings will fare in the longer run.

Two participants said they feel that the food delivery industry will sustain them for a long time, although they felt that they are currently earning less than before because of lower delivery fees paid out by the food delivery platforms. As described by the following participants:

"I think the industry is stable because it has become our habit to order food... the pay has been proven to be unstable, the pay structure even for Foodpanda. When we started, it was very good. For GrabFood, very achievable to get 40 orders a week and to get a max[imum] incentive of \$100 but now 95 orders per week to get max incentive."

FDRNM17
30, primary income, Malay male, married
GCE 'O' Level qualifications, lives in a 1-2 room rental flat

"Stable income? I would say not really. Because those who work full-time, they have to work every single day to get a certain amount. The industry itself, I think it would last because now it's like we're in the digital world so people will get lazier and probably just order food."

FDRNM15,
25, primary income, Malay
NITEC holder, lives in a 4-room flat

Some felt quite strongly that both the industry and earnings of food delivery workers would be unstable going forward.

Food delivery workers interviewed in this study who have been in the business longer also reminisced about the days when incentives for riders were much higher. According to them, the food delivery platforms often change the incentives offered to food delivery workers. The reduction in incentives began as more individuals entered the food delivery business.

A GrabFood interviewee, for instance, suggested that the platform is more susceptible to reducing its incentives because according to him, it does not control the total number of food delivery workers at any given time, whereas Foodpanda and Deliveroo require riders to book shifts in advance. This caps the total number of riders available at any given period.

One participant shared that food delivery companies often over-recruit, meaning there are too many workers and not enough orders and deliveries to keep them busy. The results are lower pay rates and incentives. He shared:

"...if let's say this was still back in May, June [2019], I would say yes [industry is stable]. But now no... The number of entrants [food delivery workers] and they slash the [fees] and everything."

FDRFA04
28, primary income, Malay male, NITEC qualification, lives in a 4-room flat

Some participants also found that only particular locations and timings were profitable. So, while their options to sign on or off the app were flexible, realistically their productive working hours were determined by patterns of consumer demand.

"...to be honest right, it's a bit of luck also. Because it's like GPS. And then, to get orders, you have to be [at] the best spot. Then, depending on where your destination is also."

FDRFA01
23, primary income, Malay male, Single, Diploma qualification, lives in a 4-room flat

However, there are those who are optimistic that both the industry and income will be stable in the longer run.

"Actually, I think it is [stable]. Because I know of [full-time] riders who earn a lot and are actually living comfortably. Thanks to food delivery."

FDRNM12
24, primary income, Malay male, currently pursuing a part-time degree GCE 'A' Level qualification, lives in a 4-room flat

When asked about the possibility of technology disrupting the industry, most argued that it would not displace the labour required to carry out food delivery. Many also felt that, while the government is advocating adoption of technology and going digital, Singaporeans are less receptive to the impact of technological changes.

"...I don't think [food delivery work will be displaced by technology] because there is nothing that can replace the human. Difficult because you still need somebody to send the food."

FDRAS02
54, primary income, Malay male, married GCE 'A' Level qualification, lives in a 5-room flat

"I doubt in Singapore [food delivery work] would [be replaced by technology]. Singaporean's mentality is very backward. PMD is a good step forward, but we are resistant to changes. Keep campaigning about sharing pathways. [There] shouldn't be an issue about sharing."

FDRNM17
30, primary income, Malay male, married GCE 'O' Level qualification, lives in a 1-2 room rental flat

Section C: Career Progression and Skills Upgrading

To the question of whether they plan to leave the industry in the near future, the responses were mixed. While some of the participants who answered in the affirmative were satisfied with the job, others chose to stay due to the lack of alternative employment opportunities and see gig work as a lifelong source of income.

Participants who are planning to continue food delivery work said that they intend it as long as the gig is available.

"Seems like I'll stay for long. Still long run ah! As long as it exists ah. Then what other work to do? For earning wise, this is the best. Even if you do courier, maybe your salary is half only."

FDRNM13
34, primary income, Malay female, single Sole breadwinner, Secondary 1 education, lives in a 3-room flat

"[So long] as they let us do [the work] ... I'm happy with the work I'm working."

FDRNM31
39, primary income, Indian female, single mother with eight children, Primary 5 education, lives in a 1-2-room rental flat

Meanwhile, participants who are planning to leave food delivery work said that they have other plans. The majority see it as a temporary juncture in their career and shared that they are doing food delivery work as an interim source of income and to continue to be productive while searching for something more permanent or stable that is better aligned with their interests and career plans. Two participants shared:

"I don't intend to [stay]. Earn enough and do my own things. Open shop again. I sold apparel before."

FDRNM30
37, primary income, Chinese female single mother Diploma qualification, lives in a 1-2 room rental flat

"Depending on how long I get the next job lah. Within, probably, definitely, by end of this year maybe."

FDRNM01
30, primary income, Malay male, married Diploma qualification, lives in a 4-room flat

Some participants also shared that the job lacks sustainability and long-term career prospects. As one described:

"To be honest, I can't stay long... there's no future at all. If prolong cannot lah."

FDRAS06
29, primary income, Malay male, four children GCE 'N' Level qualification, lives in a 1-2 room flat

When asked if they have plans for upskilling, most of the participants said they intend to do so. Some pursued courses prior to working in food delivery and plan to switch industries if the opportunity arises.

"Actually, I'm waiting for the government. The 25-year-old minimum age requirement to tap SkillsFutureCredit]"

FDRNM36
21, primary income, Chinese female single lives in a 4-room flat

"Want to upgrade ah! I'm planning to take a fire safety course. Once passed, salary of \$4k, \$5k can easily get!"

FDNM28
28, primary income, Malay male Higher NITEC holder, and lives in a 3-room flat

There are also those who understand upgrading to mean obtaining a driver's licence to become a private hire car driver.

"Yeah, licence maybe. My mum keeps telling me to get a licence, so I can upgrade to Grab driver."

FDRNM37
21, primary income, Chinese male, single GCE 'N' Level qualification, lives in a 4-room flat

There are, however, those who do not have plans to upgrade their skills as issues like loss of income or family commitment stand in the way. Some lack the confidence that skills upgrading can help them land a better job.

"For me, time is precious. If I go for skills upgrading courses or attend classes, I won't be able to find money for my kids... I cannot waste time to study. My time is over."

FDRAS03
37, secondary income, Malay male, married GCE 'N' Level qualifications, lives in a 4-room flat

Section D: Financial Issues and CPF Matters

Generally, most participants shared that the earnings from doing food delivery work are sufficient. Furthermore, some participants also shared that they are able to save part of their income.

"I think more than enough. Every two weeks, \$2,500, \$2,800. Able to save."

FDRNM24
35, primary income, Malay male, married GCE 'O' Level qualifications, lives in a 4-room flat

"Ok ah. I can earn and support my wife. Basically, [what] I earn now is what I had last time. When I do food delivery I don't feel [financially] constrained. Security [work], to wait for the weekly salary tough also. Now, my kitchen always got smoke [from cooking food]." (Translated from Malay)

FDRNM28
28, primary income, Malay male
Higher NITEC qualification, lives in a 3-room flat

"Can, [God willing]. Because this is just like your own business. If you're hardworking, you can earn more."

FDRNM22
38, primary income, Malay female, married
GCE 'N' Level qualification, lives in a 3-room flat

Participants who are doing food delivery work as a secondary source of income shared that their earnings from food delivery supplement the income from their full-time job.

"(I think I am earning enough, and food delivery work pays well). A month about \$200-\$250 twice a week. I can earn more if I don't have the job. If I put a lot more hours for me to [do], from morning to night, maybe. (I am able to save) from main job. FDR (earnings are) for expenses so I won't touch for my savings."

FDRNM05
30, secondary income, Malay female, single
Technical crew, Diploma qualification, lives in a 3-room flat

"Yes, enough for now. This is already supplementing my income."

FDRNM18
31, secondary income, Indian male, married
NITEC qualification, lives in a 4-room flat

"Sometimes I can save... I can use for leisure."

FDRNM20
24, secondary income, Malay male, single
GCE 'N' Level qualification, lives in a 4-room flat

CPF Matters

To the question of whether participants think CPF savings is important, the responses were mixed.² Those who said yes acknowledged the importance of contributing to their CPF:

"...personally I think [CPF] is useful. The downside to this thing is you don't have the employer contribution.... But I think it's important. It helps like if you don't have a good financial habit, it gives you a bit of buffer – you know there's money locked away. You cannot just go enjoy enjoy."

FDRNM01
30, primary income, Malay male, married
Diploma qualification lives in a 4-room flat

"Yes, [CPF] is [important]. Your future, to buy a house. Very important!"

FDRFA04
28, primary income, Malay male
NITEC qualification lives in a 5-room flat

The majority of interviewees in the secondary income group are working full-time, so most of them are already contributing to their CPF, although there are a handful who are not.

"Of course, I think (CPF is important). If you want to buy a house in Singapore, CPF must be enough. If it's not enough, you can't buy a house." (Translated from a mix of Malay and English)

FDRNM14
28, secondary income, Malay female, married
Online seller, Secondary 3 education, lives in a 1-2 room flat

² The Central Provident Fund (CPF) is a mandatory social security savings scheme funded by contributions from employers and employees, and serves to meet Singaporean's retirement, housing, and healthcare needs.

"(I think CPF is important). My salary is above \$500 so there's a contribution to CPF. I think it's important, firstly can support to buy a house and for future retirement scheme. (If I were to do FDR full time), I will top up CPF myself, but I suggest CPF should help those in need. They say you only can take out the money when you're 55. They should lower down la the age. We don't know if we're going to live till 55. If you lower the age, at least we can have a taste of our hard-earned money. The deduction is not little, it's a lot."

FDRNM05
30, secondary income, Malay female, single
Technical crew, Diploma qualification, lives in a 3-room flat

Meanwhile, those who felt that CPF savings were not important to them shared:

*"No. Really. No! Because money when hold very long, there'll be a different value. Last time money 30 cents can buy noodle or some s***. Then, \$3 only then can buy noodle. Then that \$50k [in CPF], you bring [out] 50 years later or something, [the value] will be like \$5,000. Inflation lah!"*

FDRNM37
21, primary income, Chinese male, single
GCE 'N' Level qualification, lives in a 4-room flat

"No [CPF is not important] ... because if you want to compare to all the barber shop, they don't have CPF and they can still survive... And one thing I hate the most is the accrued interest. So, I just recently evaluate my house, I've already used up I think \$90,000 of my CPF. But my accrued interest is \$7,000".

FDRNM24
35, primary income, Malay male, married
GCE 'O' Level qualification, lives in a 4-room flat

"(I think CPF) not very important... I see a lot of cases where people don't get to take out their CPF. Then they very angry about that."

FDRNM35
18, secondary income, Chinese male, single
GCE 'N' Level qualification, lives in a 3-room flat

"For now, CPF not important la because I need cash. CPF is like more of you know when you buy a house, and when you maybe retired la. Even retired also you won't get your money fully, partially I think."

FDRNM38
38, secondary income, Malay female, divorced, single mother
Nitec qualification, lives in a 1-2 room flat

One of the interviewees shared that while he thinks CPF is important, he is currently not contributing to his CPF from the earnings of his food delivery work because he felt that the company should also contribute:

"(I think CPF is important) ... need to buy a house. MediSave all. (For now, I don't top up my CPF on my own because I don't get the employer's contribution so to me it's a bit onesided if I contribute..." (translated from a mix of Malay and English)

FDRNM09
24, secondary income, Chinese male, single
Diploma qualification, lives in a 1-2 room flat

Section E: Challenges Faced by Food Delivery Workers

Participants highlighted a number of challenges they typically face, most of which fall under the purview of the company and/or the workers themselves.

Some of the common challenges the participants cited include managing the expectations of customers and restaurant staff, especially in situations not under their control. A common problem is customers not being contactable when the delivery driver reaches their door step. According to the interviewees, they are liable for any lost earnings due to either customer or merchant delay, most of which are out of their control.

"Sometimes when they order food and opt to pay by cash, but they didn't collect the food. They never open the door, so we cannot do anything. So, we have to pay for that food, to Foodpanda. Foodpanda will deduct from our bank la (translated from a mix of Malay and English)."

FDRAS07
22, secondary income, Malay female, single
Financial consultant, Diploma qualification, lives in a 1-2 room flat

Other problems include delays in responses from restaurants. According to some participants, waiting times for merchants have increased due to the spike in food delivery demand and the entry of merchants who are new to the delivery platforms. There are also merchants who wait to prepare orders only when the food delivery worker arrives to pick up the food.

"(There are vendors who are) busy, look at handphone but they don't check their working device." (Translated from a mix of Malay and English)

FDRAS05
36, secondary income, Malay male, divorced
Deliveryman, PSLE education, lives in a 4-room flat

Participants also shared that they sometimes encountered issues communicating with management in the event of disputes, as shared by the following participant:

"They take very long to reply, then after that, they don't really solve the problem."

FDRNM35
18, secondary income, Chinese male, single,
Awaiting National Service, GCE 'N' Level qualification,
lives in a 3-room flat

One of the participants who rides a PMD also expressed his unhappiness about the allocation of trips to riders.

"...the trips are allocated to PMD riders even though they are quite far which is suitable for motorbikes."

FDRAS12
31, secondary income, Chinese male, married
Associate engineer, Diploma qualification, lives in a 5-room/
Executive flat

Some participants were frustrated with the constant revisions food delivery platforms made to change the terms and conditions of their incentives, which directly affected their earning potential. As one worker described this:

"Previously, Monday to Friday incentives they will (pay us on) maybe Saturday night around 8 pm but right now they push it to the following week. If people like us (who) need (money) urgently to like to buy for kid's pampers everything, how we going to earn?"

FDRAS13
32, secondary income, Chinese male, married
Hawker, Nitec qualification, lives in a 5-room flat

However, there are also some challenges highlighted that may come under the purview of the authorities.

For example, workers highlighted the lack of basic benefits such as medical leave, as described by the following participant:

"Challenges also, like medical leave. When you're not really that well but you know you have to work right? That is the struggle that you have to go through. Dragging yourself [through] it, even when you are sick."

FDRNM06
25, primary income, Malay male, single
Diploma holder, lives in a 4-room flat

Participants also highlighted the lack of proper parking facilities or flexibility from authorities for food delivery workers, especially those using motorcycles. According to them, delivery riders are often at risk of incurring penalties such as fines and even unclamping charges imposed by the management of shopping malls.

"We face all sorts of things, fines! That's the worst! It's the number one challenge. When I just started the job, I already had six summons - \$110 each... at least have a grace [period] lah for delivery riders. Not all places have dispatch [facilities]." (translated from Malay)

FDRNM13
34, primary income, Malay female
Secondary 1 education, lives in a 3-room flat

"I think another challenge is regarding law enforcement also. Sometimes (when we're assigned to vendors situated at the roadside) and when we want to park (and there's) double yellow line, we can't park. But PMD can park there so it's unfair. When we park, even though (for) 5, 10 minutes, we get fined." (translated from a mix of Malay and English)

FDRAS07
22, secondary income, Malay female, single
Financial consultant, Diploma qualification,
lives in a 1-2 room flat

Riders with Disabilities

According to some participants, transportation and accessibility can be a significant issue for people with disabilities. Public transportation, for instance, can be unreliable for delivery gigs, as described by the following participants:

"Most of the time, [the challenges] we face is public transport... So, some MRT staff, they understand our situation. But some will stop us and say, why you are taking MRT... Then they said, oh [the Personal Mobility Aid or PMA] is too big!"

FDRAS02
54, primary income, Malay male, disabled
GCE 'A' Level qualification, lives in a 5-room flat

"...if you read yesterday's paper, there is [this story about] a disabled Kakak (lady). They all don't know the type of PMD she uses (he is referring to PMA). She has to board and alight from buses to send [customers'] orders. So, we the Grab people went to see her, collected money for her maintenance [of PMA]. Together, we have a group".

FDRAS03
37, primary income, Malay male
GCE 'N' Level qualification, lives in a 4-room flat

Footpath Ban for PMDs

Many of the PMD users had actually anticipated a clampdown by authorities regarding riding their devices on footpaths (the interviews took place prior to the ban). Participants shared that they follow developments on matters that they think will have a bearing on their future. However, most of them did not foresee such a drastic action as the sudden ban of PMDs on footpaths. They instead asked for all users of pavements/footpaths to be educated.

For instance, one of them shared that pedestrians sometimes used lanes meant for bicycles and were completely oblivious to others.

"Because some pedestrians they don't understand, you know. Sometimes they don't know how to differentiate between a shared path and not a shared path. They just walk. Then, when we horn or we [say] "excuse me", then they give that look."

FDRNM07
29, primary income, Malay female, single mother
PSLE qualification, lives in a 1-2 room flat

Another participant expressed his frustration on the added restrictions imposed on PMD riders:

"You cannot ride [on] the road. Car park road also apparently cannot. You cannot ride on the void deck. You cannot ride on the open area beside the void deck. Also, cannot. Then where do you want me to... It's not feasible lah!"

FDRFA06
25, primary income, Indian male
Diploma qualification, lives in a 5-room flat

One of the participants argued that should the authorities act against PMD riders, they should consider the fact that many of them were previously jobless and may belong to vulnerable groups such as ex-offenders (e.g. drug abusers) or those with low qualifications who may be struggling to find employment. One food delivery worker shared:

"Majority of Malay youngsters always lepak (loafing around), never work. This PMD really attracts them. Their motivation [were boosted to go to work] – addicts, people who never study, no qualifications. This is [what] gives them motivation to find work. They already start work, and are enjoying work, then you people (authorities) have to disturb! As long as they get their butt up, give food for their family, good enough!"

FDRNM31
39, primary income, Indian female,
single mother with eight children
Primary 5 education, lives in a 1-2 room rental flat

Another participant argued that, should the authorities act against PMD riders, they should consider the fact that not many of them have alternative modes of transport.

"The ban of the PMD would be the biggest concern, like if it's really going to ban, the next option would have to be bicycle, which I might try, might take it as a side lah. But will not give me so much anymore because you will get tired. You cannot do so much, you will go back home early. So instead of like every 4 hours, you will need to do like 2 hours, or even shorter. If let's say you have precondition like me I have asthma. I can't really cycle a lot."

FDRFA08
31, secondary income, Chinese male, married
Diploma qualification and lives in a 4-room flat



Recommendations

In identifying areas for intervention, we took into consideration the most pressing areas of concern, as revealed in our literature review and the in-depth interviews we carried out with the 60 participants.

1. Food delivery work may not necessarily be bad for all groups. Recognise the diversity among them and understand their needs.

Generally, when we talk about food delivery workers and how it might affect their long-term employability, we tend to think in terms of those who may miss out on career progression and who may be trapped in a cycle of low-wage jobs, thus losing the opportunity of securing permanent employment. This view is more applicable to the young, especially those with NITEC qualifications or higher.

Former Member of Parliament Zainal Sapari said that he does not encourage workers, especially younger workers, to work in the gig economy as a permanent job as it has few prospects in terms of skills upgrading or career progression (Baharudin, 2019). He also added that there is a danger of younger workers getting used to the job and being

lulled into complacency such that they do not look for a better one.

Another group to whom this may be pertinent is retrenched or redundant mid-career professionals, managers, executives and technicians (PMETs) who are struggling to find permanent re-employment. Like the young, the longer they remain in unskilled or semi-skilled gig economy jobs, the more detrimental it is to their permanent re-employment and subsequent career development.

Based on our interviews, we noted that the pursuit of perks to reach a threshold amount of earnings (which varies from person to person depending on their interpretation of what constitutes the lowest amount they must make in a day) is tempting and may cause a person to work long hours. This leaves them with little time to take part in activities that are directed at enhancing their employability. For instance, there are programmes available for GCE "N" and "O" Level holders that they can pursue while tapping on their SkillsFuture credits (Ministry of Manpower et al., 2015). Likewise, laid off PMETs who were displaced by structural unemployment and thus do not see the point of returning to the same industry, could pursue Professional Conversion Programmes (Workforce Singapore, n.d.).

The above notwithstanding, food delivery work has attributes that offer employment to groups who otherwise may not stand a chance at earning an income to provide for or supplement that of their household. They may be sole breadwinners who are unable to take on regular employment because of the heavy burden of caregiving, such as single mothers with a large number of children or those (women in particular) who are sandwiched between providing care for both young and elderly dependents. Some may have a family member suffering from a disability or terminal illness who needs constant care. In such cases, the flexibility offered by gig economy work is indispensable.

Some schemes incentivise companies to implement flexible work arrangements (FWAs) to create work-life harmony (Ministry of Manpower, n.d.-c). However, based on feedback from interviewees and a study on economically inactive women by the Centre for Research on Islamic and Malay Affairs (RIMA) in 2016, jobs that offer FWA are either hard to find or are not flexible enough despite their purported flexibility.

One interviewee argued that food delivery work provides employment particularly for those who are more likely to idle their time away at void decks. These may include various groups such as those whose employment efforts are hampered by criminal records and those with low educational attainment who are discouraged from seeking employment after repeated failures.

Singapore has made significant strides in raising the employability levels of those with physical disabilities. However, in the case of those whose disability stems from pre-existing medical conditions such as stroke, they appear to be struggling, as attested to by a disabled interviewee who shared his experience as well as those of fellow disabled food delivery workers with whom he is acquainted. Food delivery work provides an opportunity for such persons to gain employment as they can use their personal mobility aids (PMAs).

While there should be more initiatives to encourage food delivery workers and for that matter, the self-employed doing unskilled or semi-skilled gig economy work, to continue to seek opportunities to upgrade their skills and aim for stable and permanent full-time employment, consideration should also be given to those who may face challenges in pursuing such goals.

For them, initiatives, programmes and existing regulatory measures, such as CPF contributions, should be enhanced to ensure that they have more employment options:

a. For certain groups such as single mothers who are facing the burden of caregiving, it is evident that if the issue of flexibility can be tackled, this otherwise economically inactive lot is prepared to work. The Tripartite Alliance for Fair & Progressive Employment Practices (TAFEP) could work with employers to look into the various work arrangements that could enhance the FWA framework (TAFEP, n.d.).

b. For those with previous criminal convictions, more can be done to educate employers to dispel misconceptions that they are prone to committing repeat offences. While there are instances of repeat offenders, the rate of recidivism, although which nevertheless remains a concern as of 2018, is a minority of 40%. This is hardly justification for the discrimination against the majority of ex-offenders. Moreover, one of the key reasons that Law and Home Affairs Minister K. Shanmugam attributed to recidivism is the difficulty ex-offenders experience in securing employment (Ministry of Home Affairs, 2019).

c. As for those with disabilities arising from major illnesses, it is also evident from our interviews that they can work if conditions allow them to do so. For example, the disabled food delivery worker we interviewed competes for trips against his more abled peers but consequently gets a smaller number of them. Organisations such as TAFEP can help educate companies on improving their workplace processes and structures to be friendlier to the disabled.

Based on data from the Comprehensive Labour Force Survey, among resident persons with disabilities (PwDs) in the working ages of 15 to 64 in 2018 and 2019, on average, 28.2% were employed, 3.6% were without a job and actively looking for one, and the remaining 68.2% were outside the labour force, with most of them citing poor health or disability as the main reason (Ministry of Social and Family Development, n.d.).

2. Protect those wanting to stay as SEPs; compensate those wishing to upgrade.

Gig economy work, as highlighted in Part I, Section B, is here to stay and set to expand in the foreseeable future. Some workers will inevitably remain in jobs of such nature while others aspire for a more stable and permanent source of income. Both groups should be helped.

a. For those who want to remain in gig economy work, their well-being should be looked into. TWG has already recommended that an insurance product for SEPs should be made available. This product can provide cash benefits for prolonged

illness and injury. This is a major concern expressed by our interviewees who see a future in food delivery work but who are worried about their financial well-being in the event of a medical situation (TAFEP, n.d.). SEPs are not covered by the Work Injury Compensation Act under the amended law that was passed in Parliament on 3 September 2019. This is because they are considered to be under a contract for service with an employer. More employers are likely to turn to such self-help arrangements to reduce operating costs. According to former Nominated Member of Parliament, Associate Professor Walter Theseira, this may lead to a scenario in which the self-employed will be underpaid in the market and their wages will not reflect the full risks of the job. This is another pressing reason why existing regulation needs to be reviewed (Lim, 2019).

b. For those who intend to switch to permanent full-time employment, TWG explained that this group has access to funding for courses offered by the Continuing Education and Training Centres appointed by SkillsFuture Singapore (SSG) and certified courses offered by SSG itself. Eligible trainees can also apply for a training allowance under the Workfare Training Support scheme (Ministry of Manpower et al., 2015). However, our interviewees argued that such funding and allowances are not sufficient to cover the loss of income from taking time away from work to attend the courses.

Many are also wary of “making such sacrifices” as there is no assurance that they will land a job after that. When asked if they would consider attending a skills course if the opportunity cost of earned income is addressed, most of them said that they would. Thus, we propose that the workers are compensated for the loss of income, pro-rated according to the hours spent attending the course while foregoing the opportunity to earn an income during this time. This will entice food delivery workers, whose employability is at risk, to pursue skills acquisition or upgrading. Other measures that can be taken include setting up a programme to get more companies to be surrogate employers like the now-defunct NTUC Surrogate Employer Programme. This aims to assist employed union members who do not have employer support to pursue approved courses under the Skills Redevelopment Programme, by acting as their surrogate employer that can obtain Skills Development Funding to reduce their members’ training fees. Apart from the opportunity to upgrade their skills, participants of such programmes can also build a relationship with their sponsoring company and establish networks with key people. This may mitigate the problem of a lack of confidence concerning their employability once they have upgraded their skills.

3. Review CPF arrangements for SEPs as their numbers are expected to grow; make contributions to Ordinary and Special accounts mandatory, albeit at a lower rate of contribution compared to employed persons.

There were 190,900 residents who were involved in own-account work or self-employment as their primary form of employment, measured over a one-year period ending June 2017 (henceforth 2017), an increase from 166,800 recorded in 2016. They made up 85% of the total number of OAWs, which stood at 223,500, and accounted for 8.4% of all employed residents. The increase between 2016 and 2017 is entirely due to the growth in the number of primary OAWs (Ministry of Manpower, 2018). With such growth and considering the forecast for the industry (see Part I, Section B), the number of SEPs is likely to increase in the future.

Among the diverse lot who prefer self-employment are the young and fresh entrants into the workforce. With only MediSave contributions being mandatory (but not for Ordinary and Special accounts), young SEPs in lower-skilled categories such as food delivery are vulnerable. From our interviews, one of the reasons cited for not wanting to contribute to CPF is the lack of flexibility in withdrawing their funds, should a pressing need arise. The interviewees argued that they have more flexibility when saving on their own. Others are concerned about the future value of their savings when kept in the CPF. They argued that many SEPs were able to “survive” although they did not make CPF contributions. Such reasons fall short of taking into consideration the level of discipline it would take to entrench saving habits and to consider the funds required for their future housing and retirement needs. Others hold somewhat misguided views.

We propose that just as MediSave is made mandatory, contributions to the Ordinary and Special accounts should also be so, albeit at a rate lower than other employed persons, with flexibility embedded into the scheme in consideration that SEPs do not have employer contributions and that their income may fluctuate substantially. While it may be an administrative challenge for the CPF Board to monitor the earnings of SEPs, the same approach that the CPF has taken for MediSave can also be applied to Ordinary and Special accounts. CPF contributions are especially important for those whose earnings from food delivery work and the income of their household members totals up to an amount comparable to the bottom three deciles of Singapore’s household income distribution (Department of Statistics Singapore, n.d.)

4. Social service agencies (SSA) should reach out to food delivery workers in unconventional ways for dialogues on their future.

There are several hurdles that food delivery workers face in trying to build up skills to enhance their long-term employability. Firstly, as attested to by participants, most of them typically work long hours. To compound the problem, the hours they clock are irregular as takings are higher at certain times of the day, which they identify as “peak hours”. For most participants whose earnings from food delivery work constitute their primary source of income, the typical number of days that they work per week is six. Those with dependents, especially if they are the sole breadwinners, may work seven days a week. This group will only take days off or work shorter hours occasionally when the need arises, such as when they are unwell.

The problem is compounded when incentives begin to decline, and more individuals enter the trade, making assignments more competitive. For those to whom food delivery work is a source of secondary income, their weekends are spent doing deliveries, albeit with a smaller target per day compared to their primary income peers. Given such limiting circumstances, many participants perceive setting aside time for skills acquisition programmes as an opportunity cost too large for them to bear. The immediate payments, either daily or weekly, are primary motivators that keep them working for long hours even if they are piecemeal.

The everyday realities of food delivery workers imply that their access to information may be limited. This has a negative consequence on their ability to deliberate on their future. SSA need to reach out to the workers for dialogues on their long-term future. This may require sending out case officers on field assignments to meet the workers, at a time and place most convenient to them, to facilitate a dialogue to understand their predicaments and propose tailored solutions. Based on the testimonies of participants, this appears to be the most efficacious way to draw their attention to the stark realities of their future and to induce greater commitment in working out an “escape plan”.

The above suggests an unconventional outreach strategy that entails resource-intensive hand-holding that is not designed to elicit mass participation at one go. This will mitigate the risks of not getting responses as food delivery workers have virtually no fixed working hours.

5. SSAs can introduce bridging programmes to help those with lower educational attainments or who find learning curves too steep.

Another major stumbling block to building up skills is that many participants feel they have fallen way below the prerequisites required to participate in a skill-building programme, given the years they have been working in a job that scarcely provides them with the most basic of skills. Others feel that their educational qualifications are too low, which creates the presumption that there will be an insurmountable learning curve for them to face.

SSAs can consider facilitating bridging programmes (i.e., short courses in collaboration with industry partners that ideally can be conducted remotely to ease the workers into a long-term, module-based skills programme that taps on their SkillsFuture credits). These programmes can also incorporate the range of options the workers have at their disposal and the pathways available for them towards a sunrise industry.

Such incremental steps will help inculcate the importance of having long-term plans for their employability and dispel some prevailing misconceptions. As our interviews have shown, many individuals think they would be unable to cope with pursuing a skills development programme on top of their work hours. Landing a skilled job is, to them, an illusion.

Some participants expressed views that upgrading one’s skills is a “waste of time” as there are many who have gone through courses but failed to land a job that is commensurate with their new skills. Such issues about skills development need to be addressed. This programme can also educate prospective participants on existing agencies that link job seekers to employers and the various skills sets that are in demand.

6. Introduce befriender programmes for ex-offenders that provide testimonials for those making progress and undertake advocacy to enhance their employment prospects.

Many ex-offenders take up food delivery work because their criminal records stand in the way of them landing full-time employment. Often, their efforts end with an application form that asks them to declare any previous conviction in a court of law. Certain jobs, such as security guard or private hire car driver, are beyond their reach.

Such experiences that ex-offenders face only serve to pepper their route to reintegration with obstacles. This aggravates the risk of recidivism. Many of these ex-offenders feel discouraged and give up hope of landing permanent or full-time employment. This makes them turn to jobs that have a less stringent recruitment process, which usually means general work, odd jobs or the scarce opportunities of working with social enterprises that support ex-offenders. Food delivery work, with its low barriers to entry, is therefore the most accessible option they have. Setting aside time for skills acquisition or upgrading, which takes them away from their hourly earnings, is the least of their considerations as they struggle, arguably more than the average person, to sustain employment.

Ex-offenders need special intervention. SSAs, especially AMP Singapore with its Development and Reintegration Programme, can track the progress ex-offenders make up to 12 years after their release from incarceration. If they stay clear of offences and can demonstrate their commitment to reintegrating into society, SSAs can provide certifications with endorsements from institutions like the Ministry of Home Affairs to assure prospective employers that the particular ex-offender has made progress and that he or she is likely to remain firm on the path towards rehabilitation. Such assurances may help convince employers to give ex-offenders a second chance.

Befrienders' programmes are aimed at ensuring that ex-offenders find support when the chips are down, steering them clear of the inclination towards recidivism and helping them to stay positive. Ideally, the befrienders are those who are ex-offenders themselves but who have progressed in their lives.

In addition to the above, SSAs should undertake advocacy to discourage discriminatory treatment against ex-offenders and to educate employers on the role they can play in supporting rehabilitation and reintegration efforts. They can work in collaboration with the TAFEP to

develop education initiatives for employers and guidelines for the recruitment of ex-offenders. Among the interviewees who are ex-offenders, it is disheartening to note that all of them see little hope in landing full-time, permanent employment, let alone embark on a career with a promising future. Most see themselves working in food delivery in the longer term and are resigned to the possibility that they will remain trapped in a vicious cycle of jobs with low barriers to entry that pay low wages.

7. Roll out temporary assistance packages for vulnerable groups

For a certain group of workers with full-time jobs and perhaps their own transport, occasionally delivering food to hungry customers during their free time can be a way to supplement their income—either to boost their discretionary budget or to help cover some bills. However, according to the participants, some of them rely on the gig economy as their primary source of their income. To them, working 5 to 7 days a week for 6 to 8 hours a day is not just a bonus but an urgent necessity. These are often people who have been left behind by the job market, who have had to piece together a living through a series of part-time jobs, or even retirees whose CPF payouts are insufficient to cover their living expenses. These ageing workers rely on the gig economy to supplement their income, even as their energy flags and health deteriorates.

Many of the interviewees agreed that they would consider attending a skills upgrading programme if they are compensated for the loss of earnings while attending one. SSAs could identify food delivery workers who are most at risk of being trapped in low-wage self-employment over a prolonged period. Some of the attributes that add to the risk are as follows:

- a) Low educational attainment (e.g., GCE 'N' Levels and those without a skills certificate or work experience).
- b) The attributes listed in (a), plus the person is married, is the sole breadwinner or whose spouse is a low-income earner.
- c) The attributes in (a) and (b), plus the person has dependants (the larger the number of dependants, the higher the risk).
- d) The disabled who are capable of doing work that is not physically taxing (e.g., clerical work or other deskbound work, depending on educational attainment and/or work experience).
- e) Single mothers with the attributes specified in (a). The more dependents, the higher the

risk. However, some single mothers may not be optimistic about finding employment with sufficient flexible work arrangements.

- f) Ex-offenders with the attributes in (a) and/or (b). The going may be harder for them. In addition to upgrading their skills, they may also need support from an SSA and organisations like Yellow Ribbon Singapore.

The added measure is necessary because compensating the workers for their loss of income appears to be the only viable way to encourage them to acquire new skills. The disbursement of funds should be contingent on their attendance at the programme in which they have been enrolled.

There are a few downsides to this proposed measure. They only apply for the duration of the assistance package itself—those deemed temporary—and only for short-term programmes that will raise the workers' employment prospects by a reasonable amount. A six-month programme endorsed by certified bodies may still fit the definition of temporary. The list of courses has to be diverse to cater to a wide range of interests and, at the same time, tied to skills that are in demand in growing industries.

8. Financial literacy initiatives targeted at food delivery workers.

Another measure that can be considered is providing financial literacy programmes to raise awareness of the importance of financial planning and savings. However, this initiative has to be conducted differently from conventional financial literacy programmes as most delivery riders may not be able to devote the time to attend classroom-type lessons. Food delivery workers are application-savvy. Hence, if the finer points about financial literacy could be conveyed through apps, done in collaboration with the companies they work for, the reach of any programme should be wider.

The messages should be tailored, taking into account the fact that the day-to-day earnings of food delivery workers can fluctuate substantially depending on prevailing circumstances. They are not working with fixed remuneration. Any financial literacy programme should have content that considers the volatility of their situation with best and worst-case scenarios and include effective approaches in managing personal and household finances under such uncertainty.

COVID-19 and the Future of Food Delivery Work

The COVID-19 pandemic has wreaked havoc on Singapore's economy in unprecedented ways, culminating in the government releasing the largest financial handouts it has ever given to nearly everyone, from individuals to businesses. Some have rather inaccurately, but for understandable reasons, described it as a black swan event (because it is not entirely unpredictable).

However, the effects of the pandemic have certainly dragged Singapore past an inflection point and the country is poised for a new social and economic order. One of the most predictable consequence is the acceleration of digitalisation. It has now permeated society in a way unthinkable before the pandemic struck, with work being done mostly if not completely remotely, meetings being conducted virtually, and students engaging in home-based learning instead of classroom lessons. Those who have been resistant to going digital now find themselves in a situation where they have no other choice but to embrace it. Even elderly folk, who would previously have conversations with their peers in coffeeshops, find that now they can only do so on digital platforms like social media or voice/text messaging applications. The reluctant and the less savvy are thus made to scale the learning curve.

One of the biggest beneficiaries of the partial lockdown, uniquely known as a "Circuit Breaker" (CB) in Singapore, is the business of digital food delivery platforms. Online orders surged (Ong, 2020b) and many workers have joined the food delivery business (Ong, 2020b) after facing pay cuts, no-pay leave or job losses. Because of this, the pandemic has been a boon for food delivery companies and new food delivery workers.

Several factors contributed to the increase in online food orders. The restrictions to movements during the CB period meant that most people had to remain at home. Among them are those who are already accustomed to ordering food online and whose frequency of their orders have increased because of the movement restrictions. What is worth noting are those who previously did not order food online, but had to do so during this period. More importantly, there are those in this group who have had to order food online for the very first time, setting them on the path to becoming app-savvy. In the post-pandemic period, the net effect is that many more would have learnt to carry out their transactions digitally. With that knowledge and familiarity, not many will return to making purchases in the traditional way, except in ways that are not substitutable. For

example, an elderly person, who has learnt to make purchases online with the help of his family members, is likely to continue doing so after all the restrictions have been lifted, except when a digital transaction is not a substitute, such as going for a coffee with fellow elderly friends.

The accelerated embrace of digital technology among consumers will have a knock-on effect on businesses. The latter will accelerate the pace of digitalisation. The typical hawker, for example, learnt during the pandemic that there is an online market he could tap. There is thus an impetus on his business model to progress towards digitalisation, from showcasing products online to facilitating e-commerce payment. Buying from our favourite hawkers online is no longer a distant fantasy. As hawker food remains a part of the everyday lives of most Singaporeans and, if digital adoption picks up among the 13,828 (as of 2014, Data.gov.sg, 2016) hawkers who are operating in government-run hawker centres, this could certainly add to the growth of the food delivery industry. Add this to others who may have learnt the value of digital adoption during the pandemic, such as home-based businesses, traditional provision shops and restaurants, and food delivery platforms are therefore poised for long-term growth.

With the adoption of digital technology among individuals and businesses in the post-pandemic period, the food delivery business is expected to reach new levels. Both the pull and push factors will take on added significance. One such pull factor is the low barriers to entry, assuring immediate work and payment for jobs that are completed during a period when work and relatively regular wages are indeed not easy to come by. The push factors will likely be extenuated by a job market that is in a prolonged period of decline as the economy restructures. Job scarcity and the fact that available ones require prior training or reskilling, may push many workers with lower educational qualifications towards food delivery platforms. Even before the onset of the pandemic, there was a rising trend among fresh graduates, particularly Institute of Technical Education (ITE) and polytechnic graduates, in pursuing part-time, freelance and temporary work. From 2008 to 2018, the share of post-NS polytechnic students who worked in part-time, temporary or freelance jobs rose from 11.8% to 24.8%. An increase has also been observed for post-NS ITE graduates, from 14.4% to 25.5%. The problem is compounded by the fact that the statistics for those working full-time include those who are hired on recurring contracts of at least one year, as is the case with many university graduates (Ministry of Manpower, n.d.-c). In a

harsher economic landscape, it will be harder for anyone to have their contracts renewed or move to other contract work as businesses tend to be more cautious

While they may be assured of earnings, food delivery workers should be prepared for companies to cut back on incentives. This is because as the number of food delivery workers increase and so does the demand for delivery assignments, incentives will be used as a tool to manage the number of food delivery workers available in any given period. Moreover, food businesses will be wary of the high commissions paid to these platforms as they begin to recover after being brought to the brink of closure during the pandemic period. It is worth noting that delivery commissions are the subject of a petition against the food delivery platforms.

The petition was started by #savefnbsg, a coalition of more than 600 restaurants formed by restaurateurs Loh Lik Peng of the Unlisted Collection and Beppe de Vito of the ilLido Group. More than 2,500 restaurant owners and customers who have signed the petition on Change.org. It was addressed to three groups: delivery platforms, the government, and customers (Tan, 2020). The text of the petition that most restaurants tolerated the commissions imposed on them because before the pandemic, earnings through food delivery platforms were not a core pillar of their revenue stream. The petition even cited the case of San Francisco, where commissions are capped at 15%. If food delivery companies are to attract smaller players like hawkers, they must review their fee structures. However, the reduction in commissions would mean food delivery workers will have their incentives reduced further.

In summary, as digitalisation gains traction and as more workers flock to the food delivery trade, these workers may have to adjust their expectations about the incentives that they can accumulate as they chalk up food delivery trips. It is likely that going forward, monthly cumulative earnings for food delivery workers will only be comparable to the wages of low-wage workers.



The food delivery business is expected to grow as more individuals and businesses embrace digitalisation, made especially possible by the pandemic which has accelerated the adoption of digital technology. The outcome of this growth for food delivery workers will be mixed. On the one hand, food delivery offers immediate work and payment. Thus those who are unable to secure jobs can turn to it either to tide themselves over a period of financial need or work over the longer term. On the other hand, the earnings of food delivery workers are expected to decline considerably as food delivery companies scale back incentives, thereby lowering the cumulative monthly earnings of food delivery workers to that of low-wage workers. As economic restructuring gathers pace, it remains to be seen if job creation can keep pace with the number of jobs lost.

This study is a starting point for a broader initiative to manage the challenges and widen the opportunities of the evolving world of work.

Conclusion

The food delivery industry has helped open new doors to employment with some of the biggest beneficiaries being individuals who normally have less access to conventional jobs or are less able to accept traditional work arrangements. However, as the study suggests, food delivery workers may be forced to accept unfavourable terms and bear the substantial risk associated with insecure employment.

TWG's recommendations, we believe, will help to significantly improve the work experience, well-being and longer-term employability of SEPs. Those doing food delivery work will likewise benefit from its recommendations. However, as our interviews suggested, there are still gaps in its proposed measures as some groups may have inadvertently been left out, or the recommendations may be inadequate to address problems specific to food delivery workers. This is a group that may be more diverse in terms of their age, educational qualifications, skills and health status than the larger population of SEPs. They are also likely to be overrepresented in the lower rungs of the income and skills ladder among SEPs.

There are also views that intervention should aim to help food delivery workers find full-time permanent employment at all costs through

skills upgrading. However, it has to be borne in mind that food delivery work presents employment opportunities to those who may otherwise remain unemployed for a longer period or who may be economically inactive. Not all the attributes that food delivery work offers can be easily replicated in an alternative work environment or with flexible work arrangements.

Besides, the reluctance to hire workers with previous convictions or with pre-existing medical conditions persists among employers. Partnerships with food delivery companies present these individuals with an opportunity to earn income. As such, interventional initiatives must also aim to improve the working conditions within the food delivery sector for these individuals and not only seek to encourage them to make the transition to permanent or full-time employment.

Food delivery work stems from the drive to embrace technological innovations and to go digital. This is a cause that the government advocates. Therefore, there has to be a commitment to tackle the downsides of the changes that technological innovations impose.

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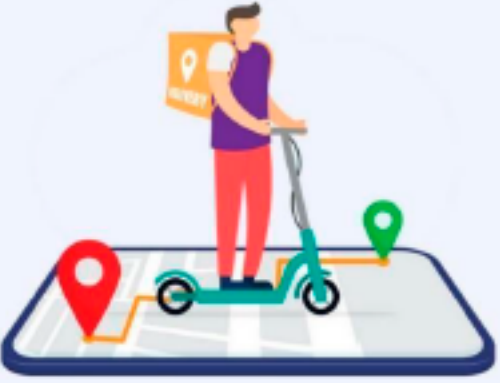
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