

# IMRG MetaPack UK Delivery Index Report

Year End Review - January 2015



*The IMRG MetaPack UK Delivery Index* has been designed to enable the e-retail industry to track a range of key benchmark metrics for the first time including parcel volumes, order values, delivery services employed and destinations served. The data is derived from dispatches from more than 200 retailers and now represents more than 5 million orders in any single month.

The January 2015 *IMRG MetaPack UK Delivery Index* covers the period to the end of December 2014 and provides year-on-year comparisons.

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## 1. Introduction

Welcome to the *IMRG MetaPack UK Delivery Index* produced in partnership with MetaPack, the delivery management specialist. The *UK Delivery Index* is designed to enable the e-retail industry to track a range of key benchmark metrics including parcel volumes, order values, delivery services employed and destinations served. We believe this will help retailers and carriers to monitor the development of e-logistics in the UK and identify areas for growth and improvement.

The information presented is aggregated from a consistent sample of MetaPack's extensive dataset so all retailers, carriers and other suppliers remain completely anonymous. While it is not possible to confirm whether the data is entirely representative of all retail sectors, by covering in excess of 200 retailers and an average of more than 5 million orders in any one month, we consider it to be a valid and highly reliable source.

The analysis offered is derived from this data and can be referenced against other IMRG information sources, notably the *IMRG Capgemini e-Retail Sales Index* and IMRG's e-Logistics reports and surveys, all of which are available to IMRG members at [www.imrg.org](http://www.imrg.org). More detailed delivery data may be available from MetaPack at its discretion by contacting Richard Rangel, Business Intelligence Product Manager – [Richard.Rangel@metapack.com](mailto:Richard.Rangel@metapack.com).

We hope you will find this a useful resource and aid to operational and strategic decision-making.

**Andrew Starkey**, Head of e-Logistics, IMRG  
& **Shiran Liyanage**, General Manager myMetaPack

## 2. Executive Summary

This month the *Delivery Index* is dominated by the impact of the super sales week covering Black Friday (28<sup>th</sup> November) to Cyber Monday (1<sup>st</sup> December), which for the first time became the busiest sales and dispatch period of the year.

Usually Manic Monday (8<sup>th</sup> December) provides this peak but the extensive publicity for Black Friday caused unprecedented demand and an online 'tsunami' of orders.

Overall December still accounted for the usual 13% of the UK's annual volume but the compression of so many orders into such a short space of time overwhelmed some retailer and carrier operations with the result that 'on time' delivery performance fell from a record November high of 93% to a record December low of 85.2%.

When compared with the level of performance the industry has achieved over the past two years in December this meant that an estimated additional 4.6 million orders were not delivered when the customer expected them. This does not take account of orders that were also dispatched late.

Consistent with previous years we saw cross-border orders slow down, the use of Specified Day (including Next Day) orders increase and Average Order Values steady but with cross-border values dropping slightly.

Looking ahead we now expect UK parcel volumes to grow by 13% year-on-year.

### 3. Volume Index

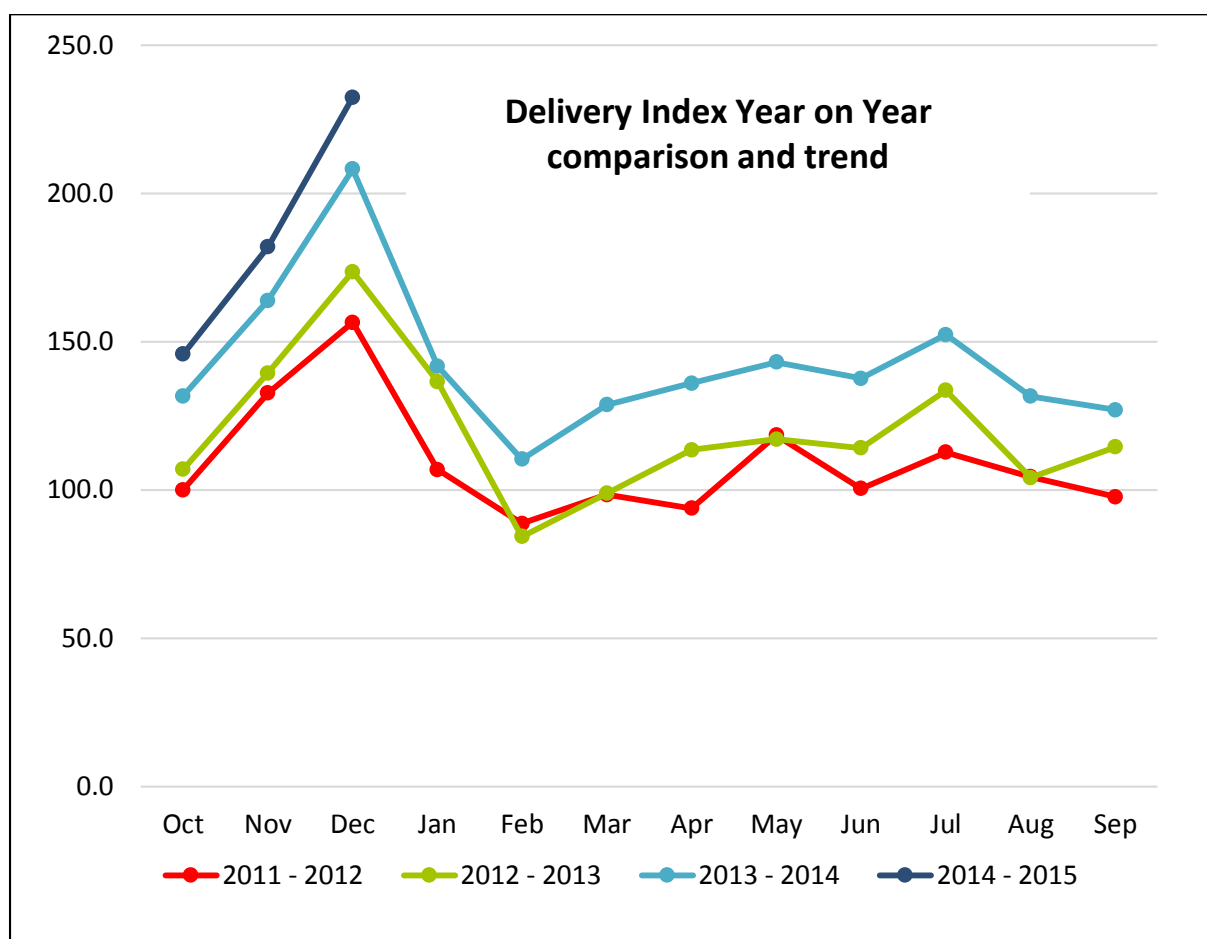
The IMRG MetaPack UK Delivery Index uses the aggregated volumes from a defined and consistent set of more than 220 retailers to track the change in parcel and order volumes over time. No specific figures are provided, but the dataset used averages more than 5 million parcels in any one month and covers cumulatively almost **210 million parcels** to date. The 'foundation' month is October 2011, setting the Index at 100. The table below shows the *Index* over a rolling 6 month period.

	July -14	Aug -14	Sep -14	Oct -14	Nov -14	Dec -14
Month on Month Change	10.7%	-13.6%	-3.5%	14.8%	24.8%	27.7%
Index	152.3	131.5	127.0	145.7	181.95	232.38

#### Commentary

As 2014 came to an end we can see from the chart below that, overall it behaved exactly as forecast and broadly consistent with the years before.

2014 ended with 16.3% cumulative year-on-year growth, December was 27.7% up on November and 11.6% up on December 2013. All exactly as predicted.

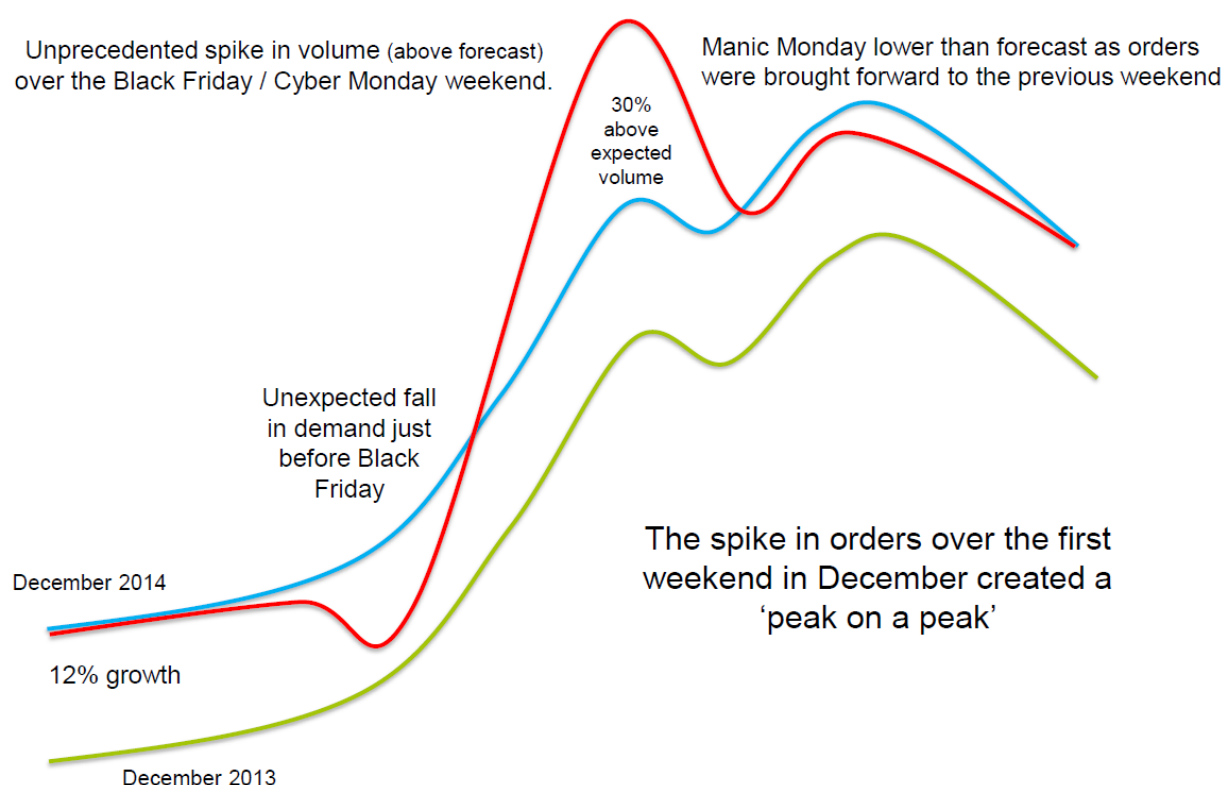


However at a more detailed level Christmas 2014 was very different.

As reported last month we already had an indication that the super sales days of Black Friday and Cyber Monday were going to have an impact. We said....

*“Work carried out by Experian and IMRG shows that the value of sales on these days combined was 27% above the already inflated forecast and the resultant unexpected high volume of orders has caused problems in the supply chain. Some retailers including high volume dispatchers like Marks and Spencer reported problems in keeping up with this exceptional demand and have not been able to dispatch orders on time”.*

The result created an e-retail delivery ‘tsunami’ with a fall in volume either side of an exceptional spike in demand. This was on top of parcel delivery volumes that were 70% above that of a typical month. The graphic below illustrates the effect.

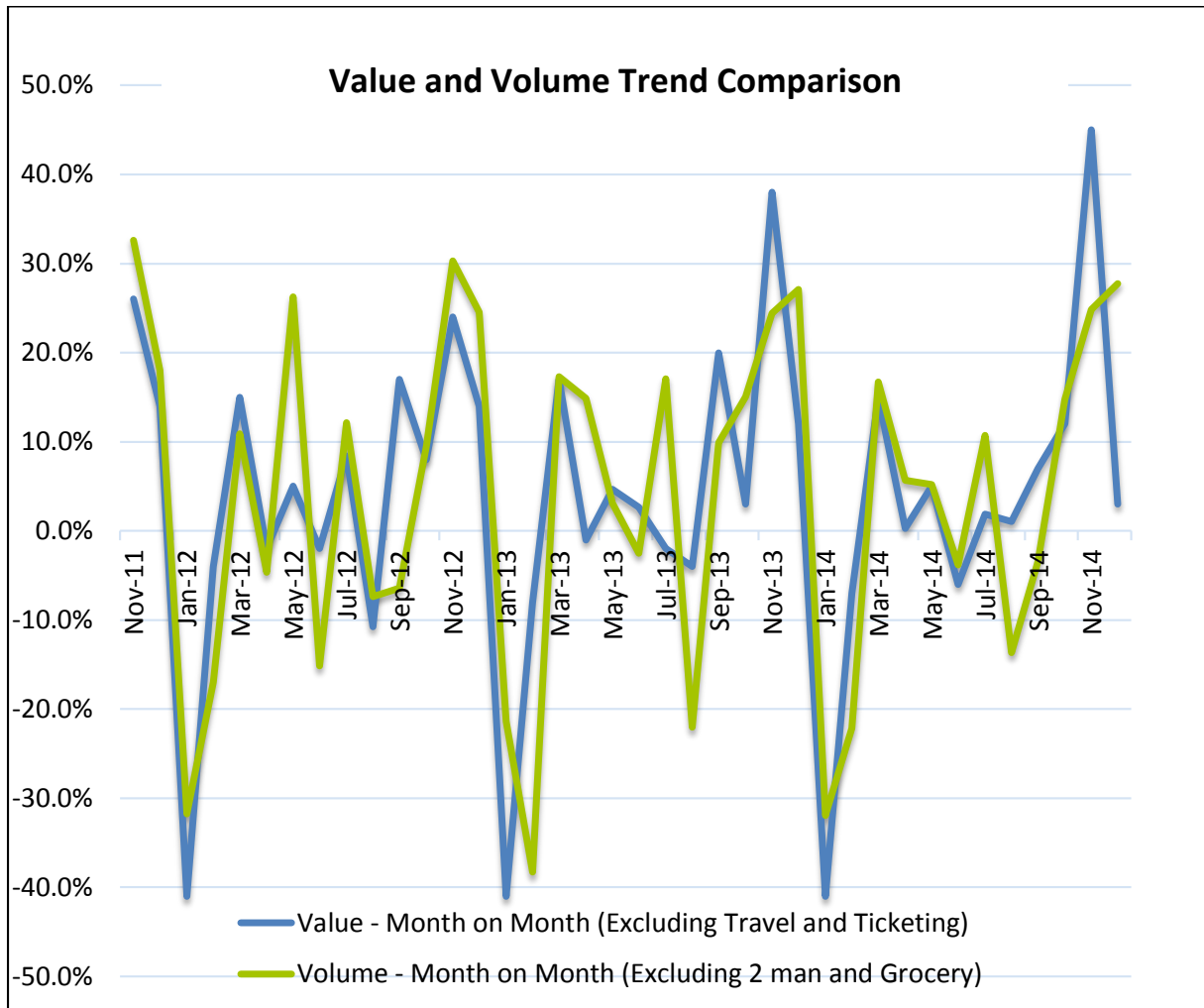


Later in this report we examine the impact of this concentrated sales period on Quality of Service but in respect of Christmas volumes it appears that this exceptional start to the month did not actually lead to a greater number of orders and deliveries.

The final volume of parcels dispatched by UK retailers through UK carriers in 2014 stayed at 920 million; slightly less than we have been forecasting for most of the year.

As always we are able to show how the volume trend compared with the value trend. The chart below shows that this month, whereas delivery volumes continued to grow into December, online order values fell when compared to an exceptionally high November.

This is because Black Friday, when the orders were placed actually fell on the 28<sup>th</sup> November but the associated dispatches happened in December.



We will also occasionally see some divergence between these two independent measures because of the growth in Click and Collect and Reserve and Collect, especially amongst multichannel retailers.

These retailers will try, where possible, to fulfil these online orders from stock already held at the store or will deliver specific orders to store via their normal stock replenishment routes (rather than by carriers). Order value fulfilled in this way does not translate into carrier delivery volume.

## 4. Service Analysis – Percentage of Total Volume

The service analysis section of the *Index* tracks the percentage of parcels and orders distributed by particular services and service types. MetaPack has provided data from more than 200 retailers, using all of the major carriers and covering all the mainstream services seen below. This dataset averages in excess of 5 million orders in any one month and more than **200 million orders** over the life of the *Index* to date.

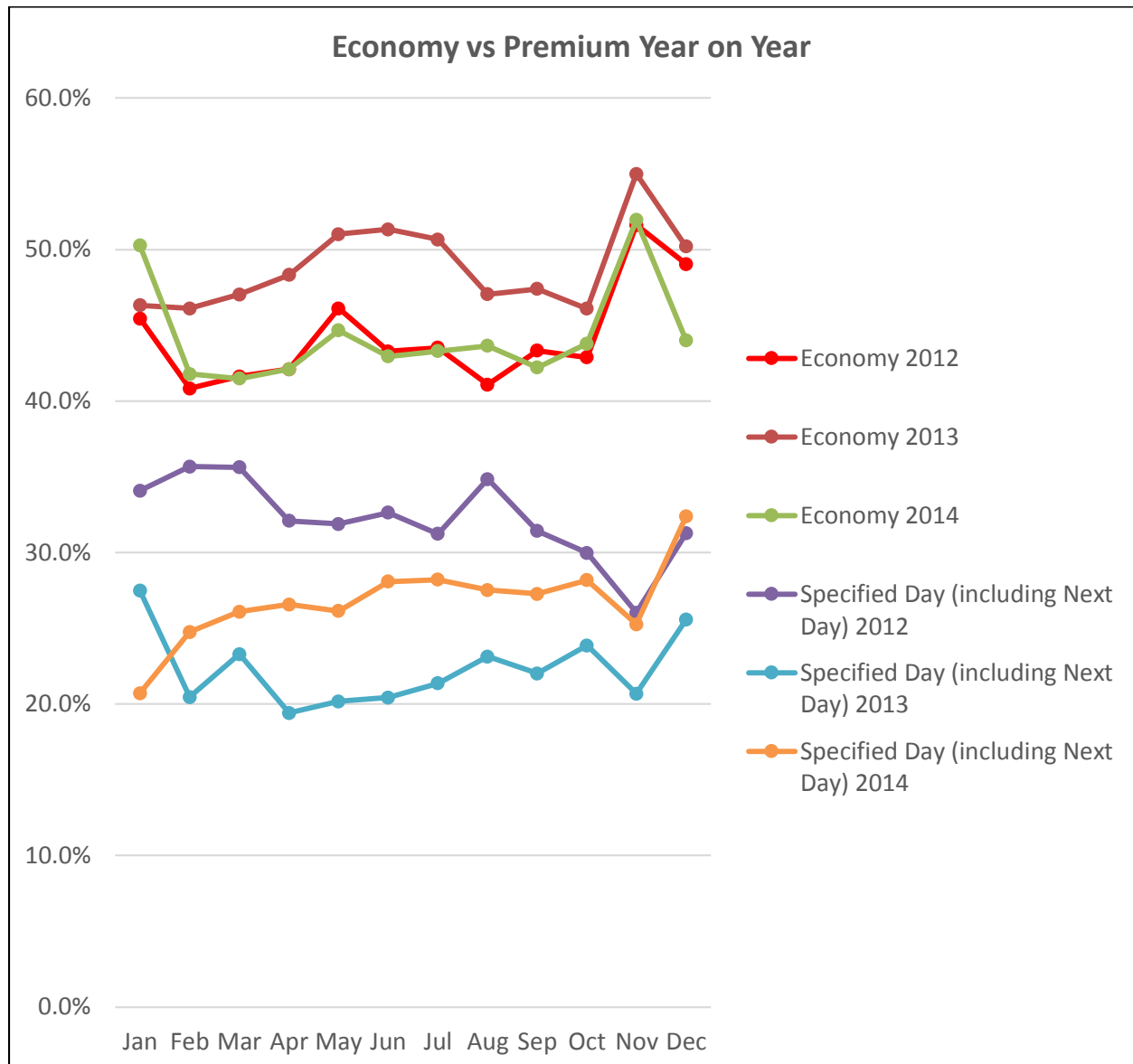
Month and Year	AM	Before 10	Economy	Evening	International	Next Day	PM	Same Day	Saturday	School Run	Sunday
Dec-13	2.1%	0.03%	50.2%	0.01%	22.1%	23.2%	0.02%	0.07%	2.3%	0.0%	
Jan-14	2.2%	0.03%	50.3%	0.01%	26.7%	18.6%	0.03%	0.02%	2.1%	0.0%	
Feb-14	3.85%	0.04%	41.8%	0.01%	29.6%	22.3%	0.02%	0.0%	2.4%	0.0%	
Mar-14	4.1%	0.03%	41.5%	0.01%	28.2%	24.1%	0.03%	0.0%	2.0%	0.0%	
Apr-14	2.3%	0.03%	42.1%	0.01%	28.9%	24.7%	0.04%	0.0%	1.9%	0.0%	
May-14	2.2%	0.03%	44.7%	0.01%	26.9%	23.6%	0.03%	0.0%	2.5%	0.0%	
Jun-14	2.6%	0.03%	42.9%	0.01%	26.3%	26.3%	0.02%	0.0%	1.8%	0.0%	0.0%
July-14	2.7%	0.04%	43.3%	0.01%	25.7%	26.5%	0.02%	0.0%	1.7%	0.0%	0.0%
Aug-14	2.5%	0.03%	43.6%	0.2%	25.2%	24.7%	0.9%	0.0%	2.2%	0.0%	0.6%
Sep-14	2.5%	0.04%	42.2%	0.3%	26.5%	25.3%	1.2%	0.0%	1.6%	0.0%	0.4%
Oct-14	2.0%	0.05%	43.8%	0.75%	24.1%	26.0%	1.2%	0.0%	1.7%	0.0%	0.5%
Nov-14	1.4%	0.09%	52.0%	0.7%	20.5%	22.8%	0.1%	0.0%	1.7%	0.0%	0.7%
Dec-14	2.6%	0.1%	44.0%	0.8%	20.0%	29.5%	0.16%	0.0%	1.9%	0.0%	0.95%

Where necessary we have defined each of the services as follows:

- AM – Delivery before 12:00
- Economy – No assured delivery lead time, no specific delivery day or time-slot
- Evening – Delivery after 17:00
- PM – Delivery after 12:00
- School Run – Delivery between 09:30 and 14:30
- Click and Collect services cannot be specifically identified but are usually included within the next day category
- A number of parcels for Ireland are sent on a next day service. For the reporting purposes we can only apply one classification for that service, so Irish parcels sent on next day services have been classified as 'next day'
- Services suggesting delivery by a specific time (e.g. before 10) are considered in the main to be 'assured' services (not necessarily carrying a guarantee of compensation should the delivery be after the specified time)
- Saturday and Sunday delivery may or may not be premium delivery options because several carriers are now using these days as standard delivery days with no additional cost. This is especially the case during the Christmas peak when extending to 7 day working increases delivery capacity.

## Commentary

Every year at Christmas we expect to see Economy services increase in use during November and for Specified Day (including Next Day) services increase in December, as the Christmas deadline approaches. This year was no different and the chart below shows this predictable trend matching previous years.



We do not have the data to show when Specified Day services were used week by week but it is likely that some of the orders selected for these services in the first week of the month would not have been delivered within the specified timescale.

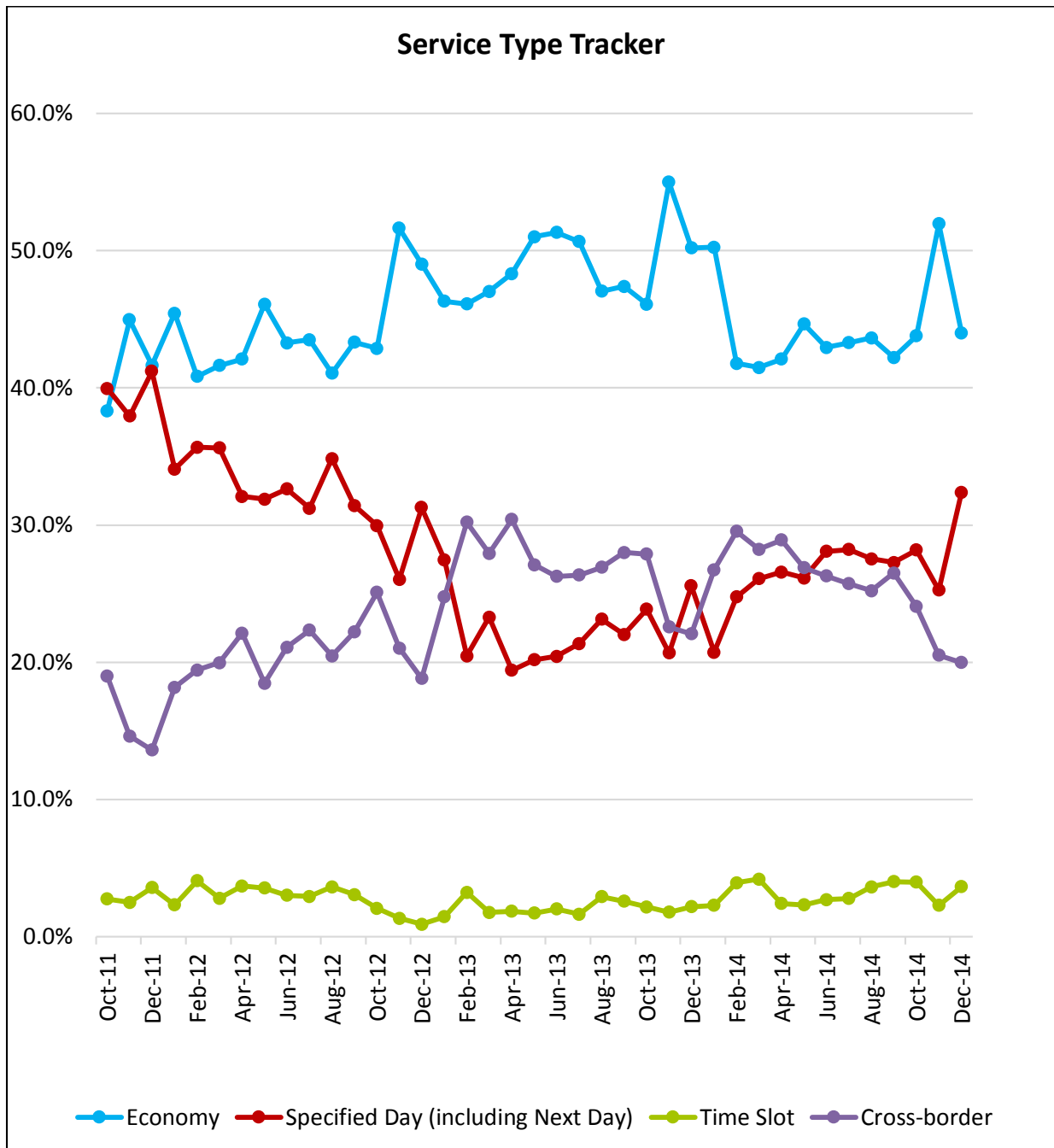
The delays in picking and packing and in hub sortation and distribution caused by the Black Friday / Cyber Monday demand spike meant that many parcels were dispatched late and took longer to move through the delivery networks.

As Christmas approached these backlogs cleared and normal service levels were resumed but it is likely that by this time all parcels were being treated as urgent, regardless of the delivery service initially specified.



We have continued to see a steady increase in Sunday Delivery but this is not surprising given that some carriers offer this as standard and during the Christmas peak (especially this year) all carriers were delivering 7 days a week.

As with previous years, cross-border orders start to slow down as the Christmas peak approaches. This will be examined further in the next section.



## 5. Destination Analysis – Percentage of Total Volume

The destination analysis section of the *Index* tracks the percentage of parcels and orders distributed to the various regions of the UK and also confirms the level of cross-border orders sent by the retailers represented. MetaPack has provided data from more than 200 retailers. Using all of the major carriers, this dataset averages in excess of 5 million orders in any one month and more than **200 million orders** over the life of the *Index* to date.

The proportion of orders being sent to international destinations may not be entirely representative of all sales because this figure may be influenced by a number of major retailers with proactive international strategies. In addition, although all deliveries were dispatched from the UK, some of the orders may have originated from sources other than UK-only (.co.uk) websites, for example a retailer's 'global' (.com) or 'in-country websites' (.de etc.).

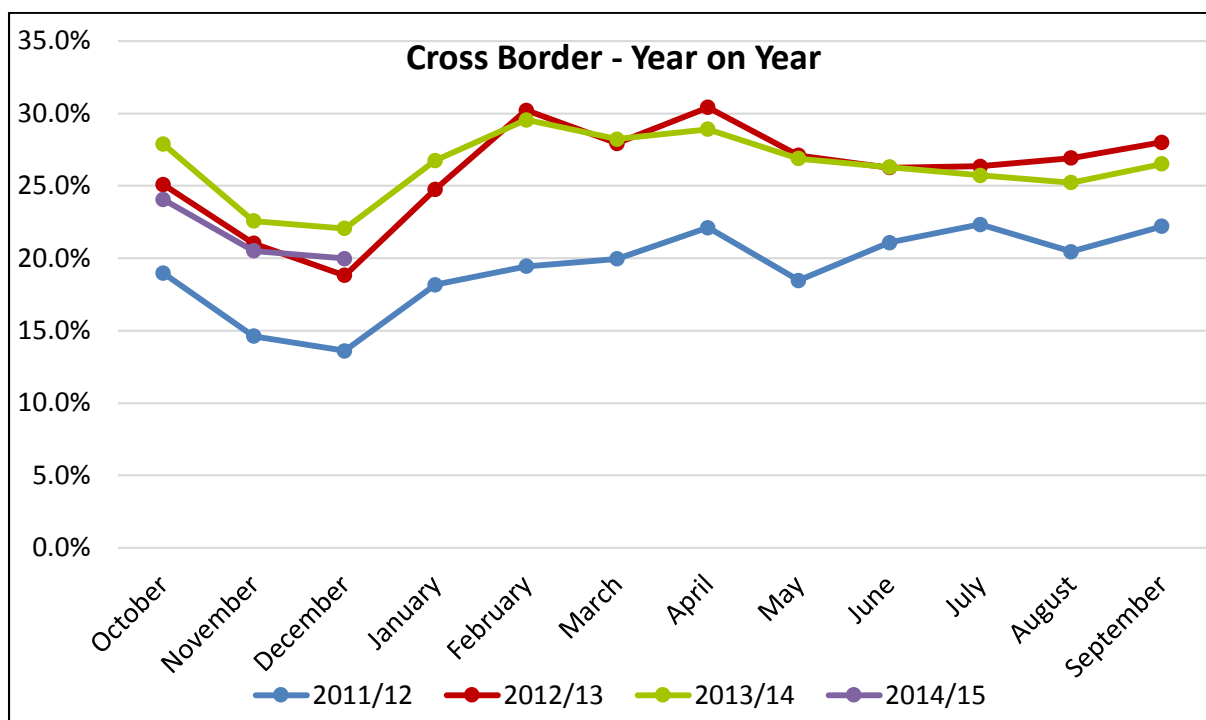
Month and Year	EAST MIDLANDS	GREATER LONDON	ISLE OF MAN	NORTH EAST	NORTH WEST	NORTHERN IRELAND	SCOTLAND	SCOTTISH ISLANDS	SOUTH EAST
Dec-13	9.0%	14.0%	0.11%	5.9%	9.85%	1.9%	7.2%	0.04%	13.75%
Jan-14	8.7%	14.5%	0.1%	5.4%	8.95%	1.7%	6.1%	0.04%	12.7%
Feb-14	8.25%	14.1%	0.09%	5.2%	8.65%	1.5%	6.0%	0.03%	12.25%
Mar-14	8.5%	13.6%	0.09%	5.4%	8.9%	1.6%	6.4%	0.03%	12.5%
Apr-14	8.35%	13.9%	0.09%	5.3%	8.95%	1.6%	6.1%	0.03%	12.3%
May-14	8.7%	13.9%	0.1%	5.6%	9.1%	1.6%	6.4%	0.03%	12.7%
Jun-14	8.6%	14.7%	0.1%	5.4%	9.1%	1.6%	6.35%	0.03%	13.05%
July-14	8.55%	15.1%	0.1%	5.5%	9.4%	1.5%	6.0%	0.03%	13.0%
Aug-14	8.7%	14.8%	0.1%	5.5%	9.4%	1.6%	6.55%	0.03%	12.9%
Sep-14	8.5%	14.4%	0.1%	5.6%	9.2%	1.8%	6.4%	0.04%	12.8%
Oct-14	8.9%	14.8%	0.1%	5.9%	9.5%	1.7%	6.6%	0.03%	13.1%
Nov-14	9.4%	13.8%	0.1%	6.4%	10.1%	1.9%	7.6%	0.04%	13.75%
Dec-14	9.2%	14.7%	0.1%	6.0%	10.2%	2.0%	7.25%	0.03%	14.0%

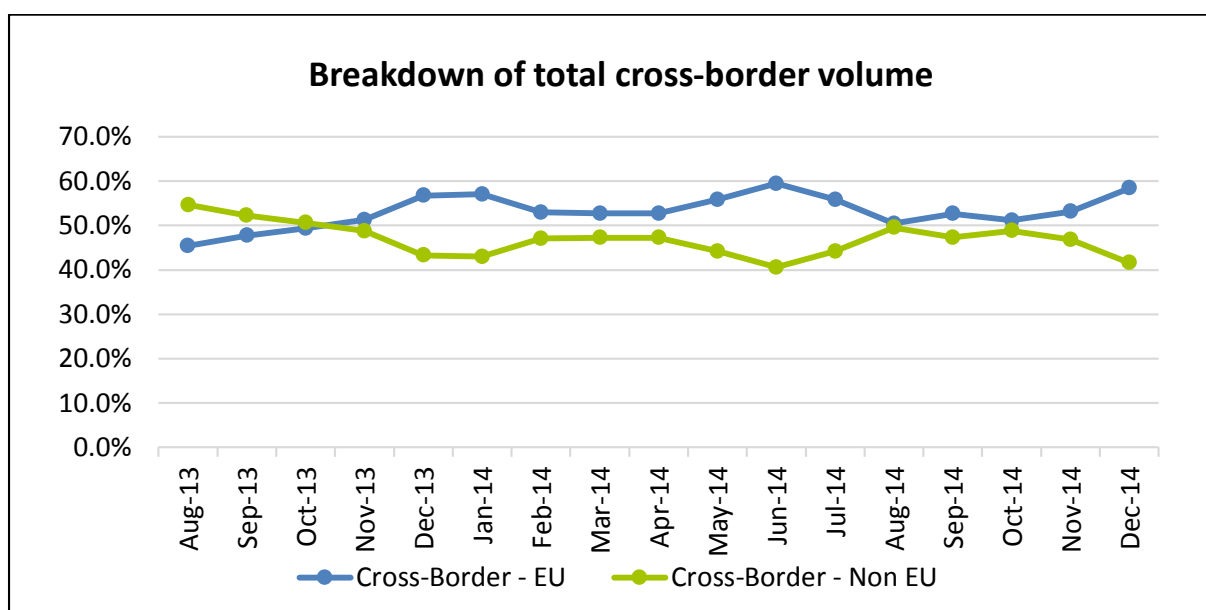
Month and Year	SOUTH WEST	Unknown	WALES	WEST MIDLANDS	BFPO	CROSS-BORDER	% CROSS BORDER TO EU	% CROSS BORDER TO NON-EU
Dec-13	5.9%	0.0%	3.65%	6.65%	0.02%	22.1%	56.7%	43.3%
Jan-14	5.5%	0.0%	3.2%	6.3%	0.02%	26.7%	57.0%	43.0%
Feb-14	5.3%	0.0%	3.1%	5.9%	0.02%	29.55%	52.9%	47.1%
Mar-14	5.5%	0.0%	3.2%	5.9%	0.02%	28.2%	52.7%	47.3%
Apr-14	5.4%	0.0%	3.2%	5.9%	0.02%	28.9%	52.7%	47.3%
May-14	5.6%	0.0%	3.3%	6.05%	0.02%	26.9%	55.8%	44.2%
Jun-14	5.4%	0.0%	3.3%	6.1%	0.02%	26.3%	59.45%	40.55%
July-14	5.35%	0.0%	3.25%	6.3%	0.02%	25.7%	55.8%	44.2%
Aug-14	5.5%	0.0%	3.4%	6.3%	0.01%	25.2%	50.5%	49.5%
Sep-14	5.4%	0.0%	3.2%	6.1%	0.01%	26.5%	52.7%	47.3%
Oct-14	5.65%	0.0%	3.4%	6.4%	0.01%	24.1%	51.2%	48.8%
Nov-14	5.9%	0.0%	3.7%	6.8%	0.02%	20.5%	53.15%	46.85%
Dec-14	5.9%	0.0%	3.7%	6.9%	0.01%	20.0%	58.4%	41.6%

## Commentary

The proportion of orders going to non-UK consumers always falls at this time of year as these shoppers look closer to home, recognising the extended lead times for cross-border delivery. The chart below confirms this trend for Christmas 2014.



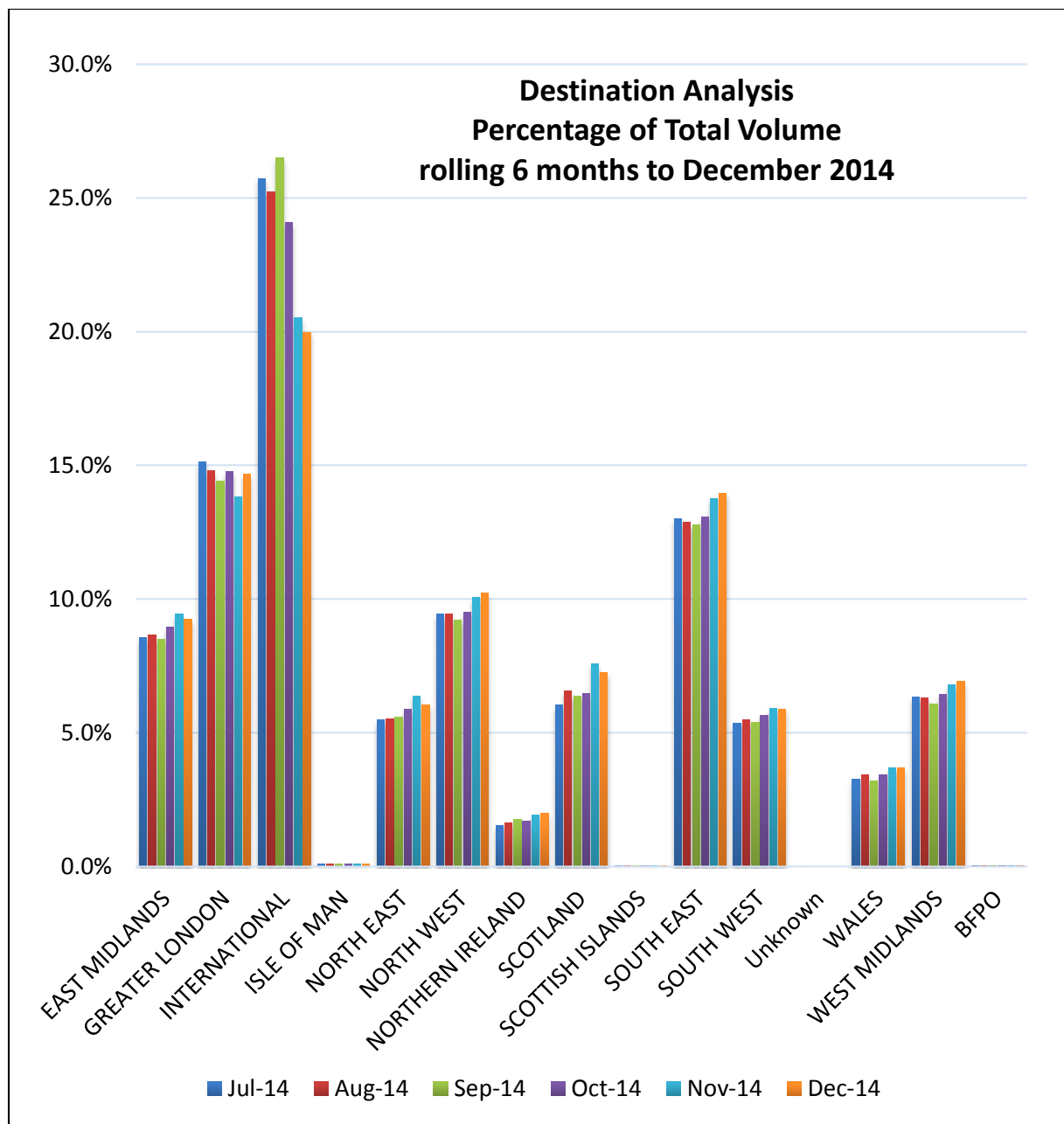
In December 2013 we saw that as Christmas approached, orders having to travel further distances (Non-EU) fell back as a proportion of total cross-border orders. This pattern has repeated in 2014.



The weighted average for the proportion of orders being sent cross-border over the past 12 months of the Index now stands at 25.2%.

To help IMRG retailer members with cross-border trading, IMRG has just launched its programme of Cross-border Trading Passports to provide the key information, help, guidance and contacts necessary to begin selling to key cross-border markets. Details of this programme can be found via this link <http://www.imrg.org/cross-border>. Members can already download the UK Passport and the China Passport with other countries to follow shortly.

Within the UK (excluding International volumes) Greater London and the South East still represent the largest proportion of volume for the month with collectively 35.8% of the overall volume, which is a full percentage point up on last month.



## 6. Quality of Service

The tables below shows the percentage of orders delivered within the timescale specified and in accordance with the service selected. This analysis only applies to 'tracked' services and therefore cannot claim to cover the full volume (an average of in excess of 5 million orders in any one month or the cumulative volume of almost **210 million parcels**). Some of the orders in question may be bound for international destinations.

For the purpose of the *UK Delivery Index*, 'on time' includes the following delivery events:

- Delivered within the timeframe specified
- Customer pre-arranged to collect from post office or carrier's depot
- Delivery attempted within the time specified but customer no longer at the address provided
- Delivery attempted within the time specified but refused by customer
- Delivery attempted within the time specified but subsequently returned to sender
- Delivery attempted within the time specified but no access to the recipient's address
- Order cancelled
- Delivery arranged with customer (as in the case of an SMS alert where the customer chooses a different delivery day)
- Inaccurate address (a separate figure is shown in section 7.1)
- Delivery attempted in the specified time but no-one at home to receive the item – card left

The *Delivery Index*, can also show the percentage of ALL orders that could not be delivered because of no one being at home to accept them and were 'Carded' requiring a re-delivery or collection by the consumer.

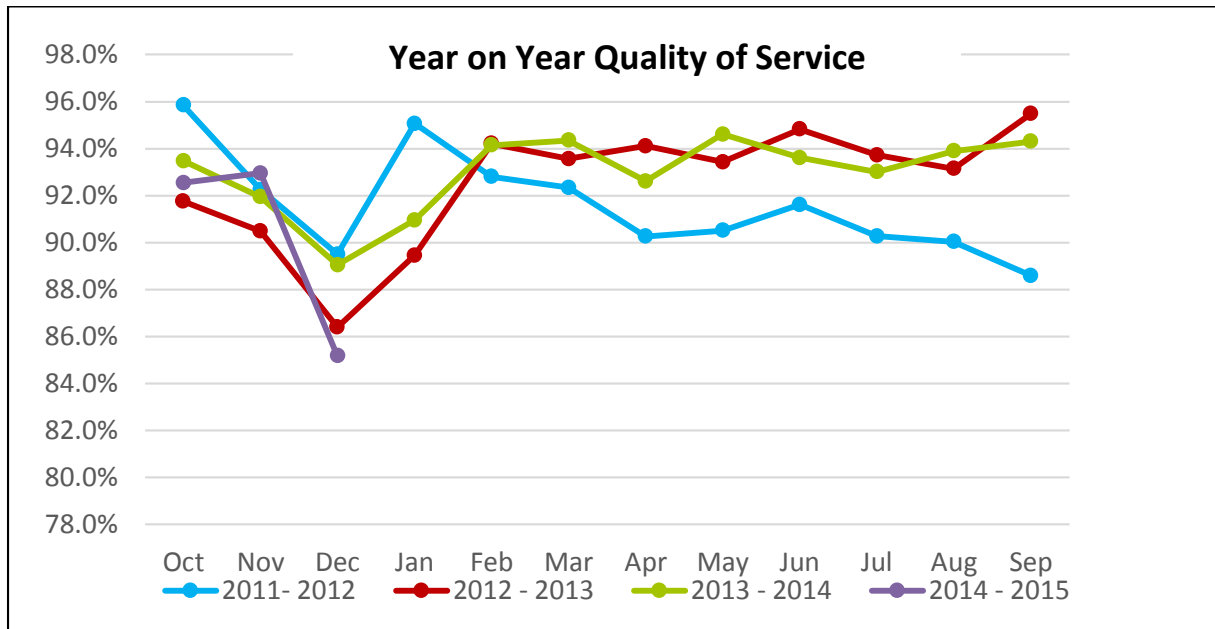
	July- 14	Aug- 14	Sep- 14	Oct- 14	Nov- 14	Dec- 14
<b>Percentage On Time Delivery</b>	93.01%	93.89%	94.30%	92.54%	92.96%	85.17%
<b>Variance on previous month</b>	99.4%	100.9%	100.4%	98.1%	100.4%	81.6%
<b>Variance on initial month</b>	97.0%	98.0%	98.4%	96.6%	97.0%	88.9%
<b>Percentage Carded – All Orders</b>	6.87%	4.61%	3.03%	3.34%	3.00%	3.54%

### Commentary

As already noted in section 3, the spike in volumes caused by Black Friday / Cyber Monday, caused problems in the supply chain during early December so a major theme of this month's report is Quality of Service.

Unfortunately we do not have the data to examine the number of orders that were delayed within the fulfilment area of the supply chain and can only comment after orders were actually dispatched.

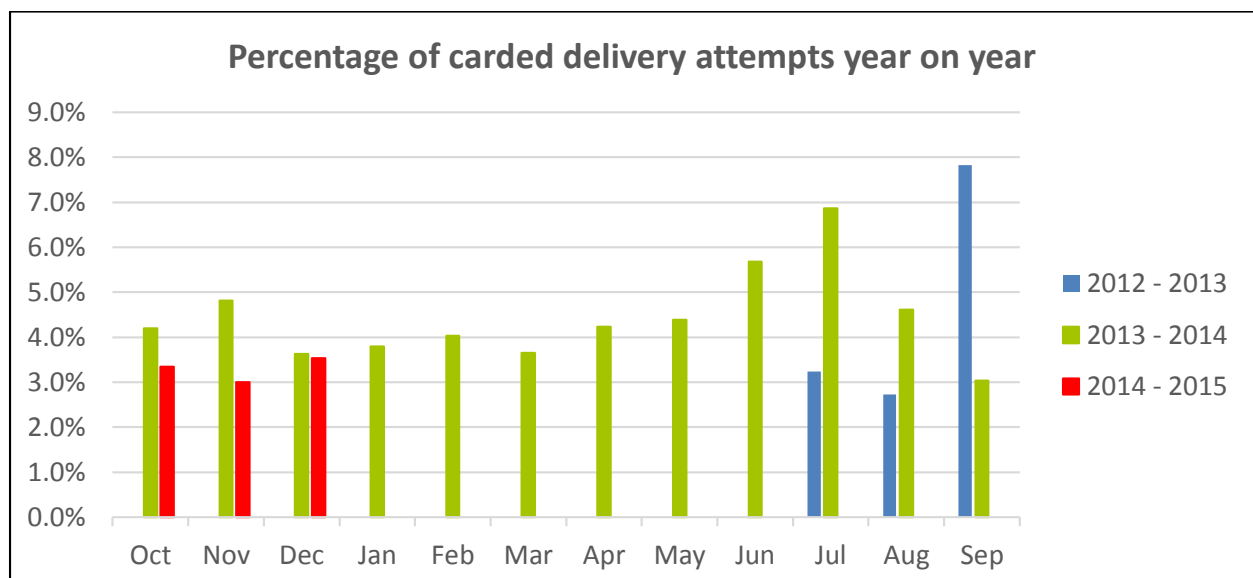
In anticipation of the impact of Black Friday / Cyber Monday, last month we predicted that we would see a steep drop in the number of orders delivered or attempted 'on time'. This proved to be the case.



The chart above shows how well the carrier community was prepared and coping with already record November volumes with an 'on time' performance figure for November dispatches. However when the exceptional volumes arrived in the first week in December this performance was severely disrupted and over the whole of December the performance figure fell to its lowest point ever within the life of the Index.

This is despite the fact that, having deployed all contingencies and recovered service levels, almost all carriers cleared their pre-Christmas deliveries and even managed to deliver, before Christmas many order that were scheduled for delivery after Boxing Day.

Attempted (carded) deliveries stayed under control despite the higher volumes. This is a strong indication that the final mile operations actually coped very well with this year's record volumes.



Overall we estimate that the proportion of orders not meeting the shopper's expectations in December (either late or not delivered at the first attempt) was 18.4% with the average over the past 12 months at 11.58%.

Using current volume forecasts this represents 102 million orders for the full year.

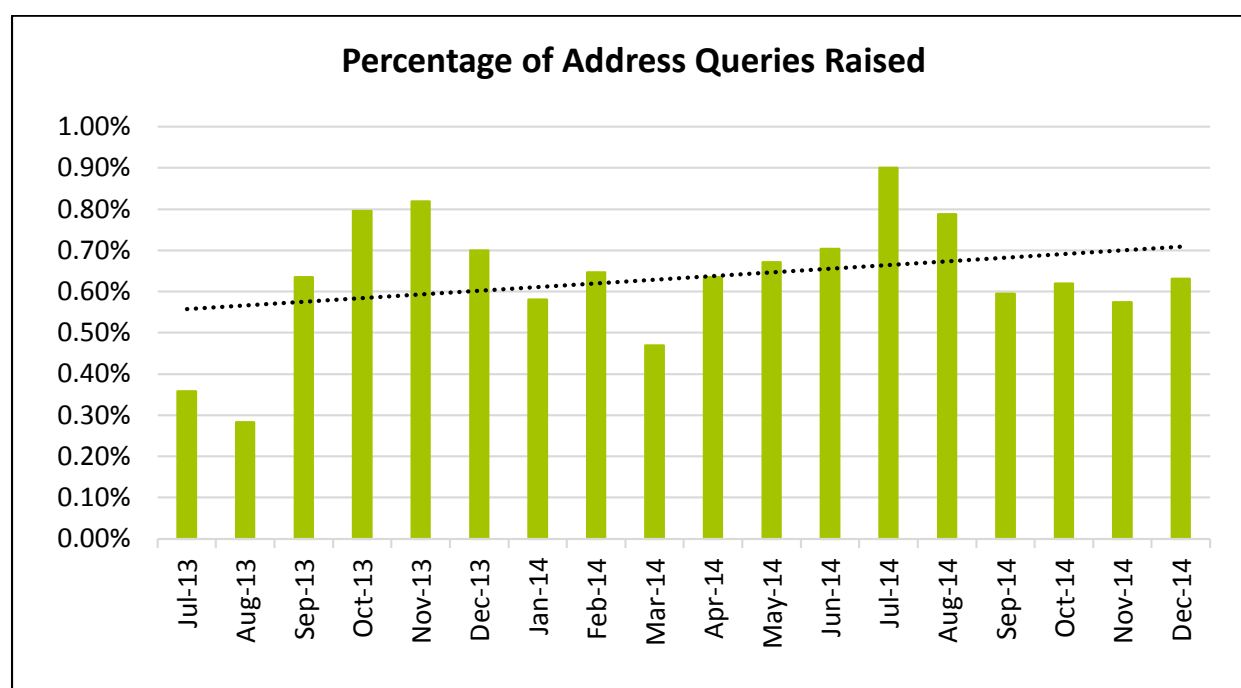
## 6.1 Addressing

The *Delivery Index* shows the level of all address queries which may have affected delivery performance.

	July-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14
Percentage of Address Queries – All Orders	0.90%	0.79%	0.60%	0.62%	0.57%	0.63%

### Commentary

The delivery problems caused by poor or inadequate addressing increased a little under the pressure of Christmas peak but overall was not significant.



Taking the weighted average over the past 12 months and using current volume forecasts, this problem is affecting 4.7 million order per annum.

## 7. Average Order Value (AOV)

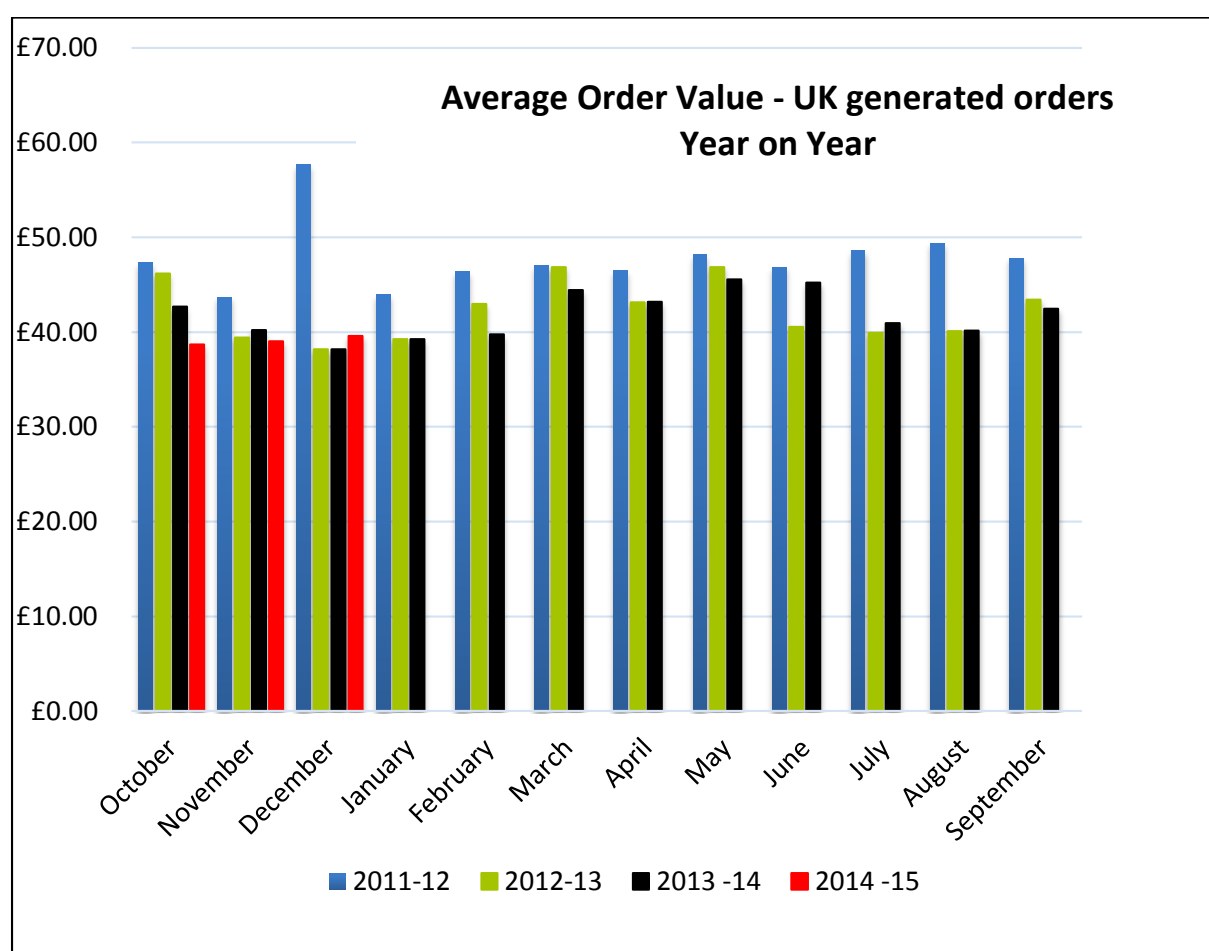
The tables below show the average value of orders included within the *Delivery Index* for a rolling six month period. This average value is lower than those shown in the *e-Retail Sales Index* (excluding travel and ticketing) because it has a lower proportion of higher value '2 Man' deliveries and no Grocery deliveries.

Average Order Value	July- 14	Aug- 14	Sep- 14	Oct- 14	Nov- 14	Dec- 14
All destinations	£40.94	£40.14	£42.45	£38.69	£39.05	£39.57
UK to UK Orders	£39.70	£38.54	£40.07	£36.66	£37.75	£38.14
UK to EU Orders	£51.66	£53.08	£52.32	£51.57	£52.46	£51.40
UK to non EU Orders	£54.87	£54.42	£52.23	£57.17	£56.62	£54.46

### Commentary

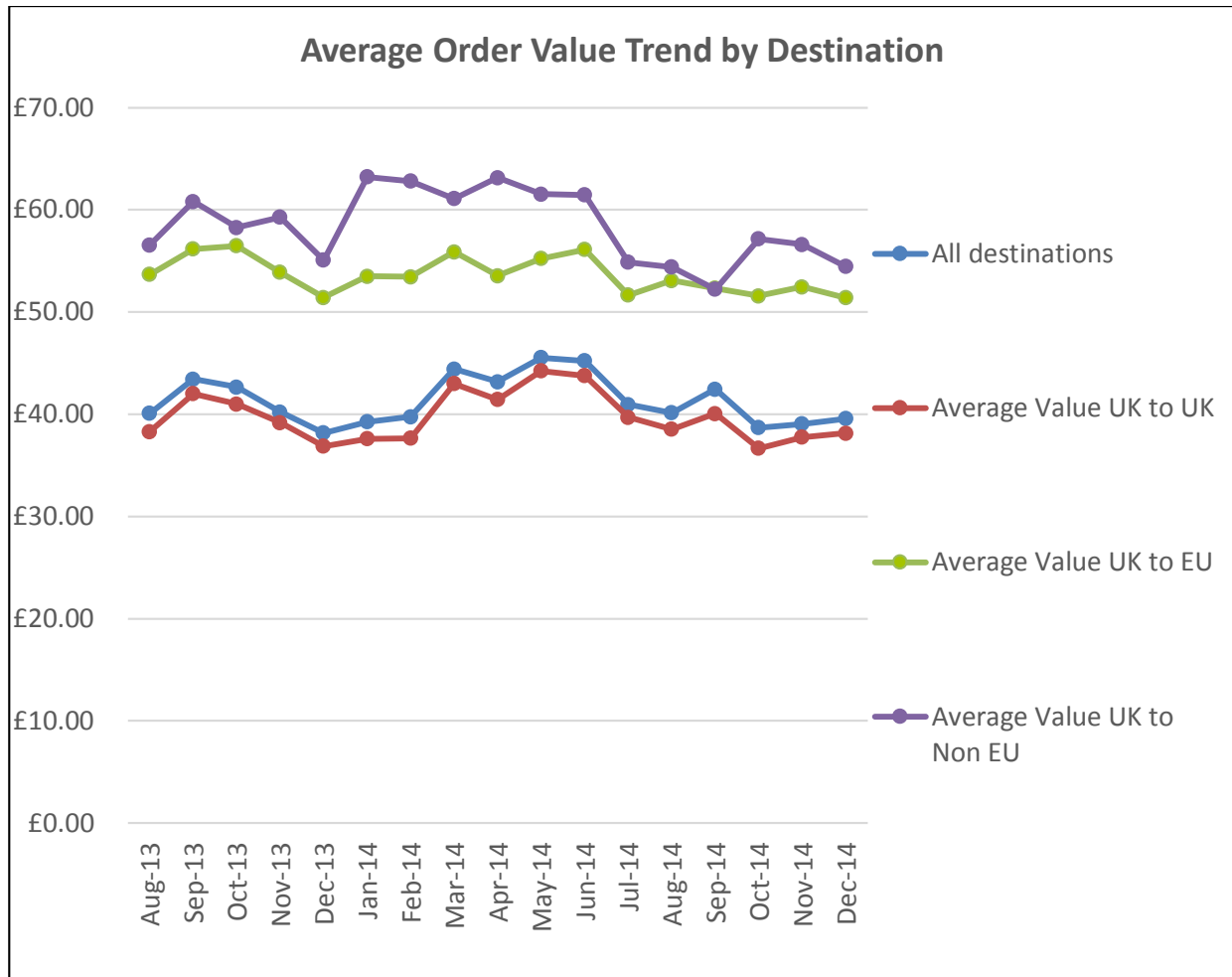
Despite a slight increase in overall parcel delivery order values in December the trend is still down.

This suggests that shoppers are increasingly treating online shopping as a routine event and are no longer planning online purchases in the way they perhaps were when the *Index* began.





The chart below shows how this is broken down into UK, EU and Non-EU destinations and shows that that the slight month-on-month rise is driven by UK shoppers. EU and Non-EU orders have both dropped slightly in value, perhaps reflecting the slow-down in demand for cross-border shopping at Christmas.



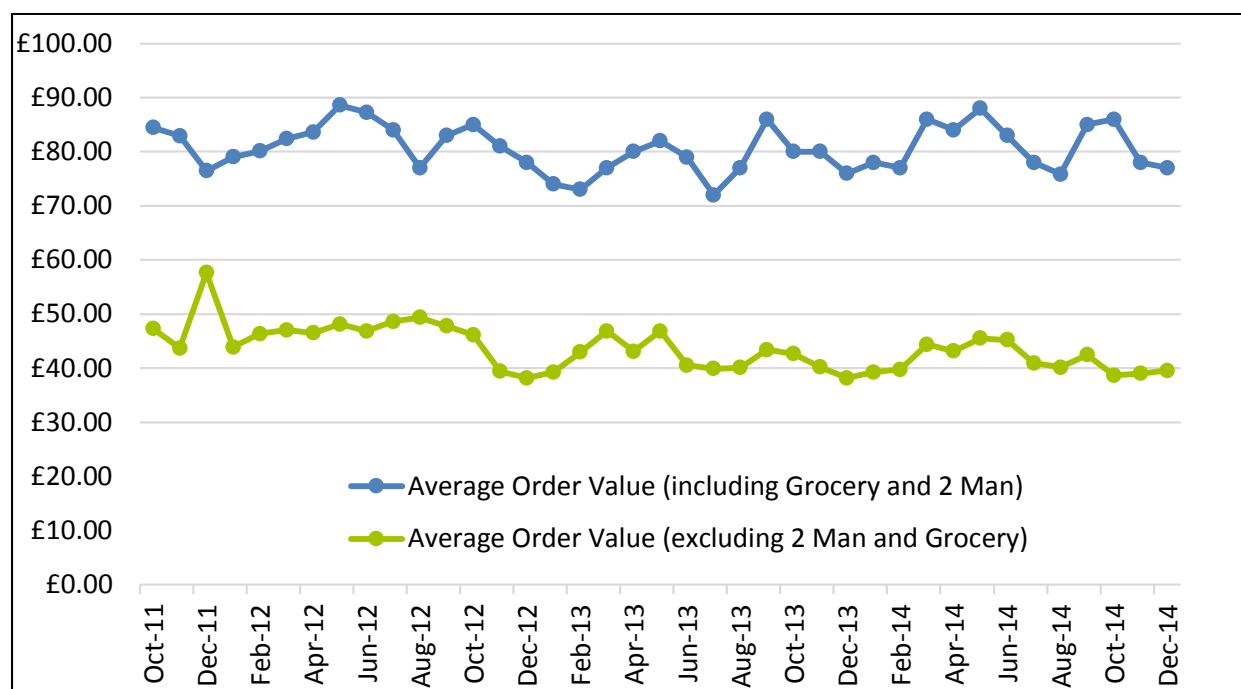
In order to provide another dimension for this data, we also track the AOV trend for 'Packets and Parcels' against the AOV trend for orders including Grocery and '2 Man' deliveries<sup>1</sup>.

As we can see from the following charts, AOVs tracked by these two independent measures follow a similar path and the AOV, excluding travel and ticketing but including 2 Man and Grocery, stands at £77.00 this month.

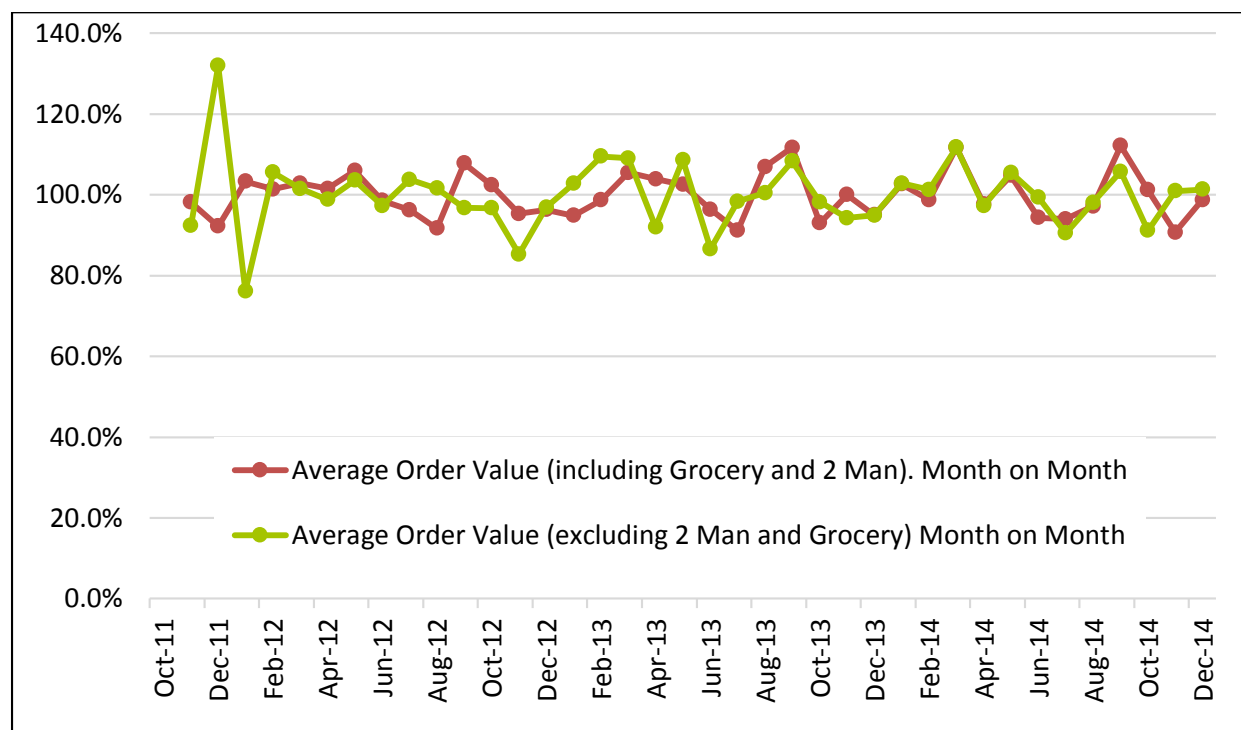
The weighted average order value for parcel deliveries over the past 12 months and for all destinations now stands at £39.76 and a full year analysis of order values including Grocery and 2 Man orders also shows a weighted average decrease from £76.02 in 2013 to £74.54 in 2014

<sup>1</sup> Derived from the IMRG Capgemini Retail Sales Index

The first chart shows the change in percentage terms of Average Order Values.



The second shows the month-on-month percentage change of each of the measures.



## 8. Forecasts

Taking the data and analysis in the preceding sections, we are able to consider forecasts for the years ahead and refine these on a monthly basis.

In the latter part of 2014 we saw the early growth rates (driven by post-recession confidence?) slow down and we ended the year with 16.3% cumulative growth on 2013. Looking ahead, anticipating that the post-recession effect would have less effect we have been forecasting a 14% growth rate for 2015.

With the final year figure being lower than initially expected and coupled with the fact that 2015 will contain an election and then possibility of interest rate rises towards the end of the year, we expect consumers to be a little more cautious. We have therefore amended our full year volume forecast to 13% growth.

We have recently completed a parallel market sizing exercise which confirms the proportion of deliveries represented by *Index* retailers and that the forecast above is realistic and consistent with the volume of orders handled by the UK's carriers.

This forecast does include some Click and Collect orders that are specifically delivered to store or third party outlets by carriers but does not include all Click and Collect volumes. See below.

### Click and Collect

Retailers are now adopting 'In Store' Click and Collect and Reserve and Collect solutions. Since 2013 we have also seen a significant increase in the number of solutions providers offering third party networks. This competition is likely to raise consumer awareness, especially if retailers promote it as a 'free' option.

The *IMRG Quarterly Benchmark Index* is now tracking a combination of Click and Collect and Reserve and Collect orders for leading multichannel retailers at about 14% - 16% on average but with some considerably higher than this. We also know that the use of Click and Collect fluctuates with the seasons and that in the three months to October 2014 the average for multi-channel retailers increased to 22%.

It is unlikely that all retailers currently achieve this level with many having few or no store outlets through which to operate. For those that do many of these orders will be fulfilled from store stock (either from the shelf or delivered specifically from the Distribution Centre as part of the normal store inventory replenishment routine), rather than delivered as individual orders by carriers to either stores or 3<sup>rd</sup> party collection networks.

We currently estimate that all Click and Collect overall represents about 10% of orders with half of this being delivered to stores or 3<sup>rd</sup> party collection networks and the remainder fulfilled from shelf stock or 'delivered in' inventory.

As more retailers develop and refine their Click and Collect propositions, we may see the annual growth rate for leading multichannel retailers slow down as this solution matures but may also see an increase in the use of third party locations as 'non store' retailers seek to offer this service to their customers.

## Cross-Border

In section 5 we offer the view that although the *Delivery Index* is running at 25.2% of all UK-generated orders, we need a more conservative estimate to cover all UK e-retailers of 5 - 7 points lower at about 18% - 20%. This figure has been confirmed by a recent parallel market sizing exercise we have undertaken. This gap is likely to close during 2015.

Given our observation that the growth in the proportion of cross-border orders appears to have stalled this year, we consider it prudent to revise our annual growth forecast. Although this year there has been no proportion growth on last year we do expect this to increase again as new markets and new retailers come online in the international scene. However this may not be immediately apparent in 2015 and we have therefore decided to maintain the current figure of 18% for at least the first half of 2015. Thereafter we have applied a 10% per annum growth rate on the proportion of orders being sent cross-border for the purpose of our forecast.

We will continue to review and adjust this as data become available.

## Carrier Delivery Services

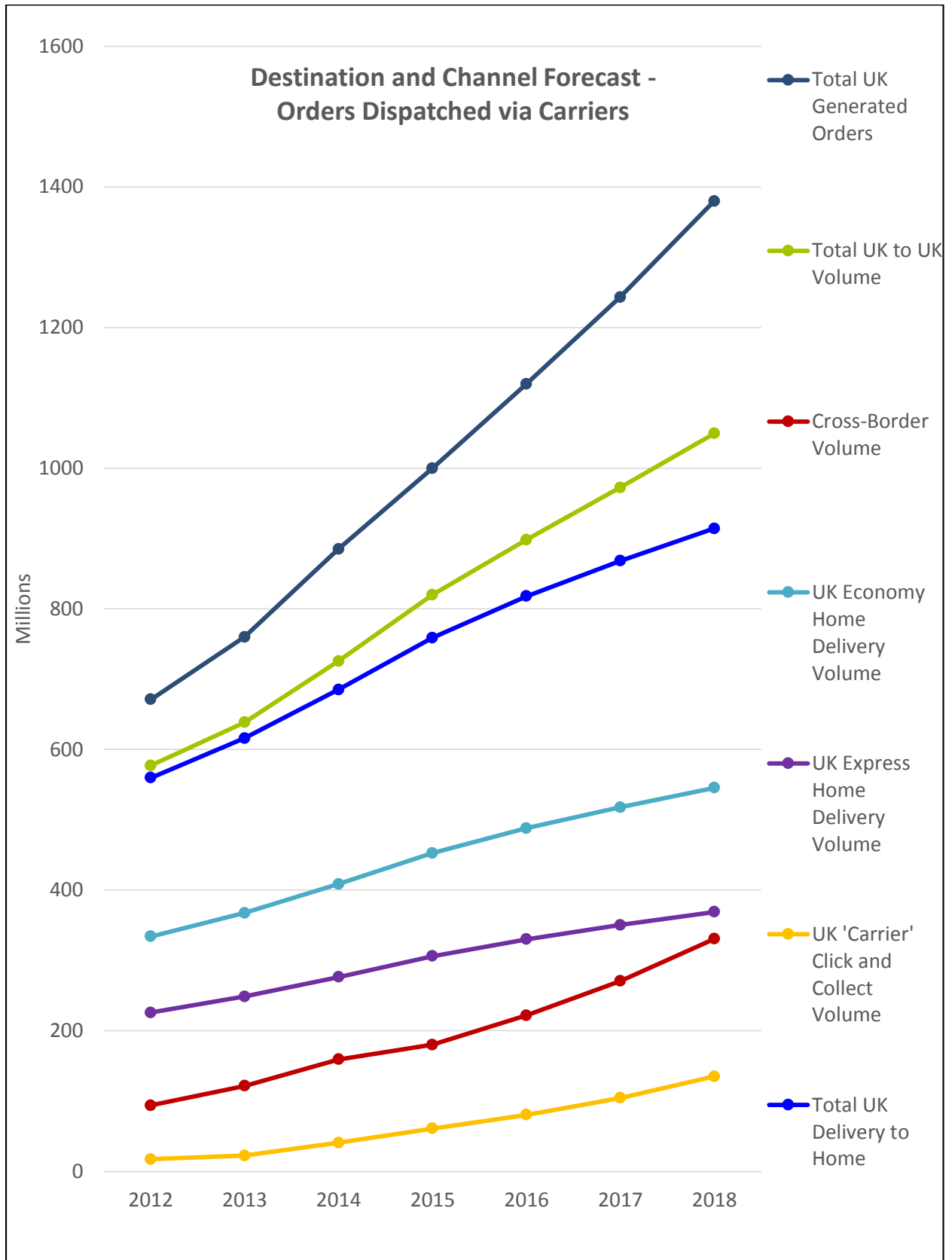
Over the past two years we have seen a reduction in the use of Specified Day Delivery (Including Next Day) and Time Slot delivery services as a proportion of total volumes, in favour of Economy and Cross-Border services. Excluding Cross-Border volumes, these services now account for 40% of UK delivery volumes with Economy taking the remaining 60%.

Over the past 18 months we have seen increasing delivery costs and enhancements to Economy services (allowing consumers to receive tracking information and pre-delivery alerts) drive this trend but it now seems to be finding a new equilibrium and the trend has steadied.

We will therefore use these figures as the starting point for our forecast but update them on a monthly basis to reflect the correct allocation in real time. Looking ahead, the introduction of non-premium weekend delivery services may again reduce the need for Specified and Next Day services.

## Channel and Service Forecast

Applying all of these values and assumptions together may produce a scenario between 2014 and 2018 described in the chart below.



## About the Authors

### IMRG

IMRG (Interactive Media in Retail Group) is the UK's industry association for e-retail.

Formed in 1990, IMRG is setting and maintaining pragmatic and robust e-retail standards to enable fast-track industry growth, and facilitates its community of members with practical help, information, tools, guidance and networking. Consumers can be confident when dealing with IMRG Members because all interact in an environment where they are encouraged to operate using methods that are Honest, Decent, Legal, Truthful and Fair, and have undertaken to not bring the industry into disrepute.

The strength of IMRG is the collective and cooperative power of its members. For more information please visit [www.imrg.org](http://www.imrg.org) or email [membership@imrg.org](mailto:membership@imrg.org).

### MetaPack

Founded in 1999, the MetaPack Group provides eCommerce and multi-channel delivery technology to leading retailers. MetaPack's highly configurable platform looks after the customer delivery experience generating consumer trust and loyalty. The software connects shippers with parcel carriers, as well as a wide range of alternative delivery, collection and returns services.

MetaPack works with over 300 parcel carriers to help improve the delivery experience for shoppers and serves over 75% of the top 100 UK retailers, as well as many SMEs and suppliers. Through a single point of integration retailers can access over 3,500 delivery and collection services worldwide enabling retailers to provide a seamless and flexible range of options to their consumers and a personalised experience in the shopping cart. Increasingly its customers are using MetaPack technology to expand overseas, as well as utilising new data-related and anti-fraud services and performance measures.

MetaPack has offices in London, Hamburg and Poland and includes many large continental European retailers as customers. Shipping over 350 million parcels a year, MetaPack is used as a benchmark standard to the e-retail industry.

For more information please visit [www.metapack.com](http://www.metapack.com) or email [info@metapack.com](mailto:info@metapack.com)

### Andrew Starkey

Andrew is retained by IMRG as its Head of e-Logistics to run its e-retail Delivery and Logistics programme for the benefit of all IMRG members. He is also the founder of the strategic e-retail and postal consultancy *Spiral4...* and he has a unique background in the world of parcels, packets and postal logistics with over 30 years' experience gained from the commercial sector and the regulatory environment.

He is a member of the Chartered Institute of Logistics and Transport and the Institute of Direct Marketing and is a recognised expert on the UK postal and e-retail home delivery markets. He can be contacted at [andrew.starkey@imrg.org](mailto:andrew.starkey@imrg.org) or [andrew@spiral4solutions.co.uk](mailto:andrew@spiral4solutions.co.uk).