

IMRG MetaPack UK Delivery Index Report

September 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 6 million orders in any single month.

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

Contents

1. Introduction	3
2. Executive Summary	3
3. Volume Index	3
4. Service Analysis – Percentage of Total Volume	6
5. Destination Analysis – Percentage of Total Volume	8
6. Quality of Service	11
6.1 Addressing	13
7. Average Order Value (AOV)	14
8. Forecasts	16
About the Authors	18
IMRG	19
MetaPack	19
Andrew Starkey	19

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 6 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.

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

Andrew Starkey, Head of e-Logistics, IMRG
& **Kees de Vos**, Chief Commercial Officer, MetaPack

2. Executive Summary

Although *Delivery Index* volumes are down 12.7% on the summer mini-peak of July, the year-on-year (August 2014 vs August 2015) increase of 18.1% means that the UK e-retail market is now exactly on track to deliver the predicted 13% cumulative volume growth in 2015.

This will produce 1.05 billion parcels, almost a quarter of which will be dispatched during November and December. As we prepare for this peak all eyes will be on the level of first time / on time delivery which this month has surprisingly fallen back from the record highs of the past few months.

Included in this volume will be a high proportion of cross-border orders and although the level of cross-border as a proportion of the total always drops back in December, overseas markets are becoming increasingly important to UK retailers. Although these markets have traditionally higher costs, average order values are also higher than for UK domestic deliveries, even if these have fallen somewhat over the past two months.

In order to help retailers take advantage of these new markets, IMRG in association with eCommerce Worldwide is hosting a cross-border summit on 24th September to which all IMRG members are welcome to attend at no charge. <http://www.imrg.org/e-commerce-worldwide-cross-border-summit>

Within the UK market average order values for parcel deliveries continue to recover on the back of a strengthening economy and improving consumer confidence.

3. Volume Index

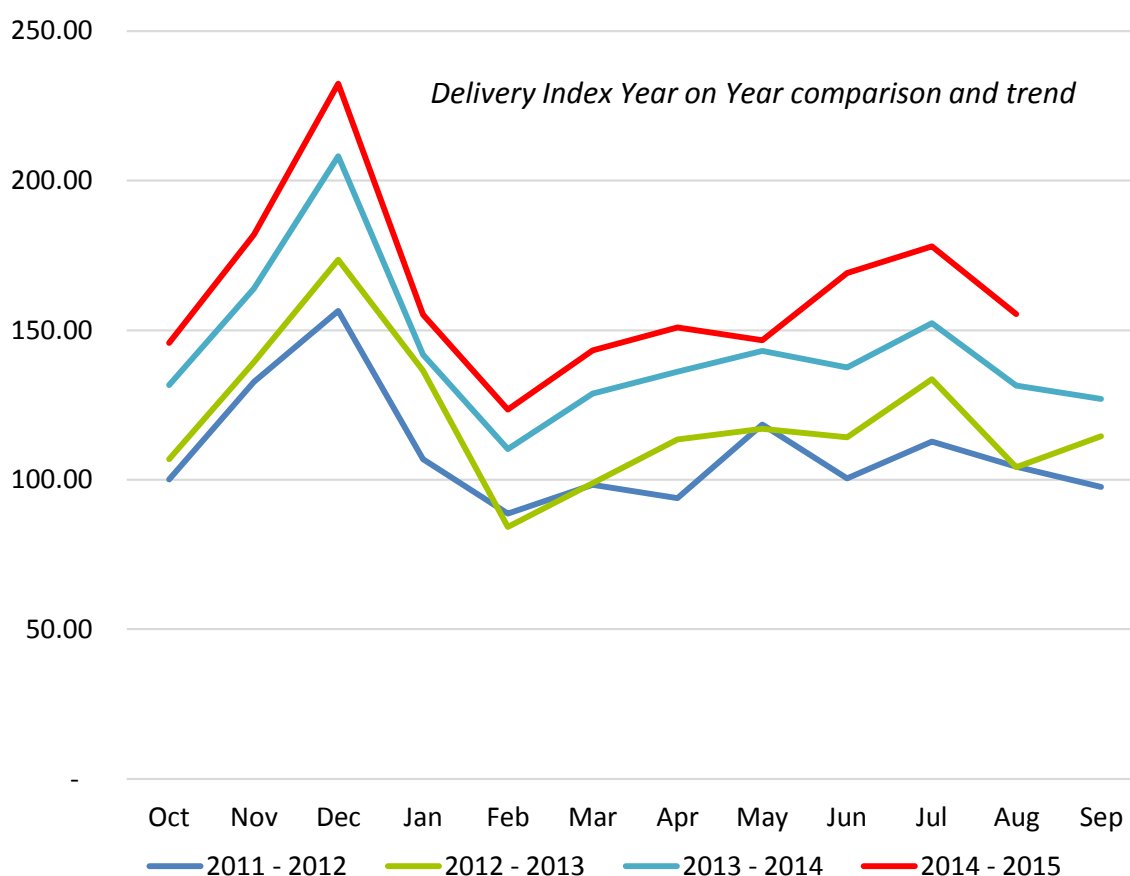
The IMRG MetaPack UK Delivery Index uses the aggregated volumes from a defined and consistent set of more than 220 retailers to track the change in parcel and order volumes over time. No specific figures are provided, but the dataset used averages more than 6 million parcels in any one month and covers cumulatively almost **260 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.

	Mar -15	Apr -15	May -15	Jun -15	July -15	Aug -15
Month on Month Change	16.1%	5.3%	-2.9%	15.3%	5.3%	-12.7%
Index	143.3	151	146.6	169.03	178.04	155.35

Commentary

As usual, the August index has shown the expected drop in parcel volume and is 12.7% down on July. This is always the case as shoppers enter into the full swing of the holiday period and do less online than when preparing for the holidays.

However despite of, or perhaps because of the damp weather, consumers have not turned completely away from online shopping and this month's volume is still an increase of more than 18% on August 2014.



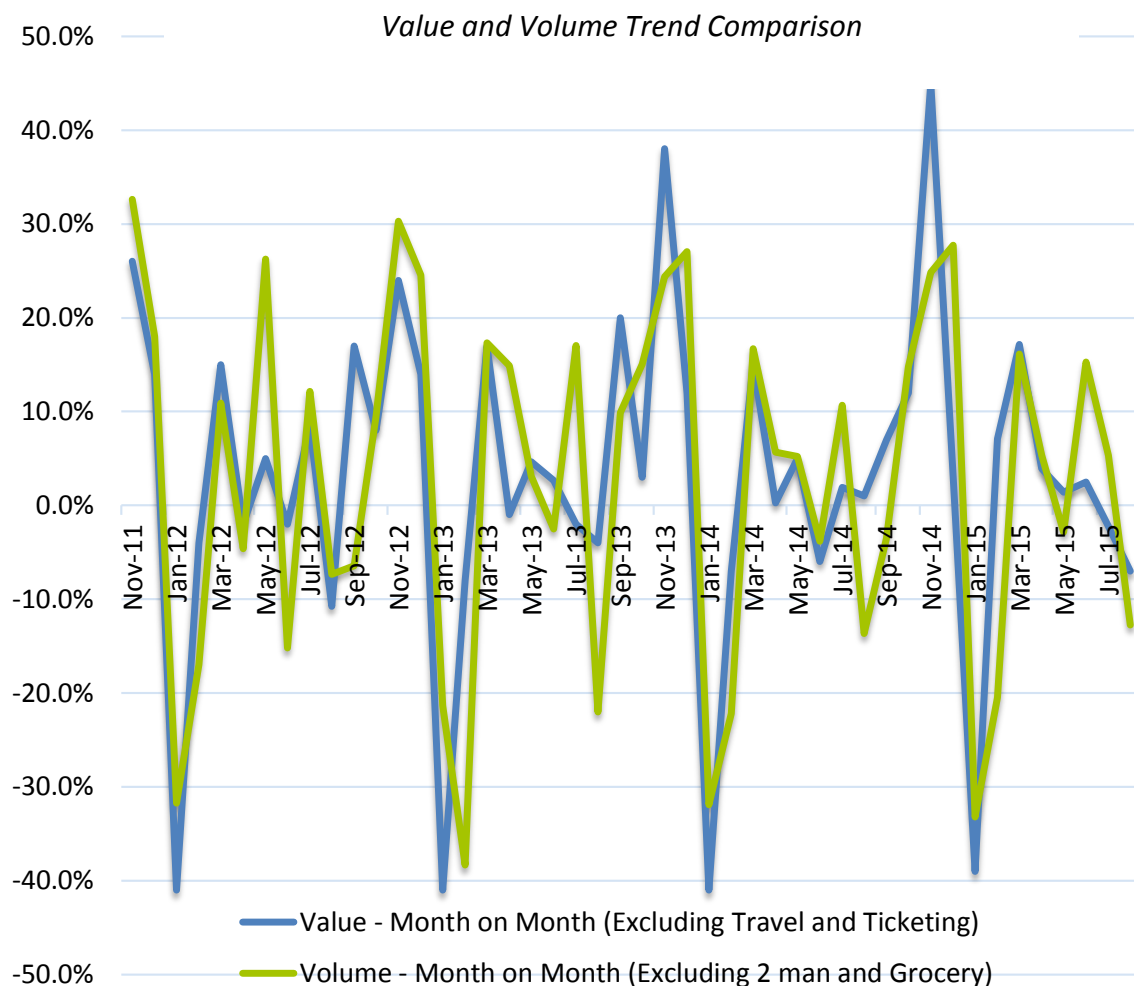
Despite the slow start to the year, the cumulative growth rate for 2015 (Jan- August) is now exactly the same as our start of year forecast of 13%.

Providing this continues (or improves) we can expect UK retailers to dispatch 1.05 billion parcels in 2015, through UK carrier networks.

Of this volume we expect almost a quarter to be sent out during November and December, some of this concentrated during the Black Friday / Cyber Monday weekend.

As usual, to check these figures we also look to the *IMRG Capgemini e-Retail Sales Index* which independently tracks the value of e-retail sales using a data set representing about £14 billion of retail sales per annum.

Here again we can see that the value of the UK e-retail market has fallen this month and continues to closely track the Delivery Index.



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 6 million orders in any one month and almost **250 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	Sunday
Sep-14	2.5%	0.04%	42.2%	0.3%	26.5%	25.3%	1.2%	0.0%	1.6%	0.4%
Oct-14	2.0%	0.05%	43.8%	0.75%	24.1%	26.0%	1.2%	0.0%	1.7%	0.5%
Nov-14	1.4%	0.09%	52.0%	0.7%	20.5%	22.8%	0.1%	0.0%	1.7%	0.7%
Dec-14	2.6%	0.1%	44.0%	0.8%	20.0%	29.5%	0.16%	0.0%	1.9%	0.95%
Jan-15	1.8%	0.08%	46.8%	0.3%	26.2%	21.85%	0.15%	0.0%	2.1%	0.8%
Feb-15	2.3%	0.09%	43.0%	0.4%	26.4%	24.45%	0.14%	0.0%	2.4%	0.75%
Mar-15	2.0%	0.1%	40.2%	0.4 %	25.9%	28.5%	0.2%	0.0%	2.1%	0.6%
Apr-15	1.9%	0.1%	42.1%	0.4%	27.4%	26.0%	0.14%	0.01%	1.5%	0.5%
May-15	0.7%	0.1%	42.4%	0.4%	25.75%	27.9%	0.12%	0.01%	1.8%	0.9%
Jun-15	0.7%	0.1%	45.6%	0.85%	23.0%	28.0%	0.11%	0.02%	1.2%	0.5%
July-15	0.65%	0.1%	43.3%	0.55%	24.4%	28.7%	0.12%	0.02%	1.5%	0.6%
Aug-15	0.9%	0.1%	42.55%	0.7%	24.4%	28.9%	0.08%	0.02%	1.6%	0.8%

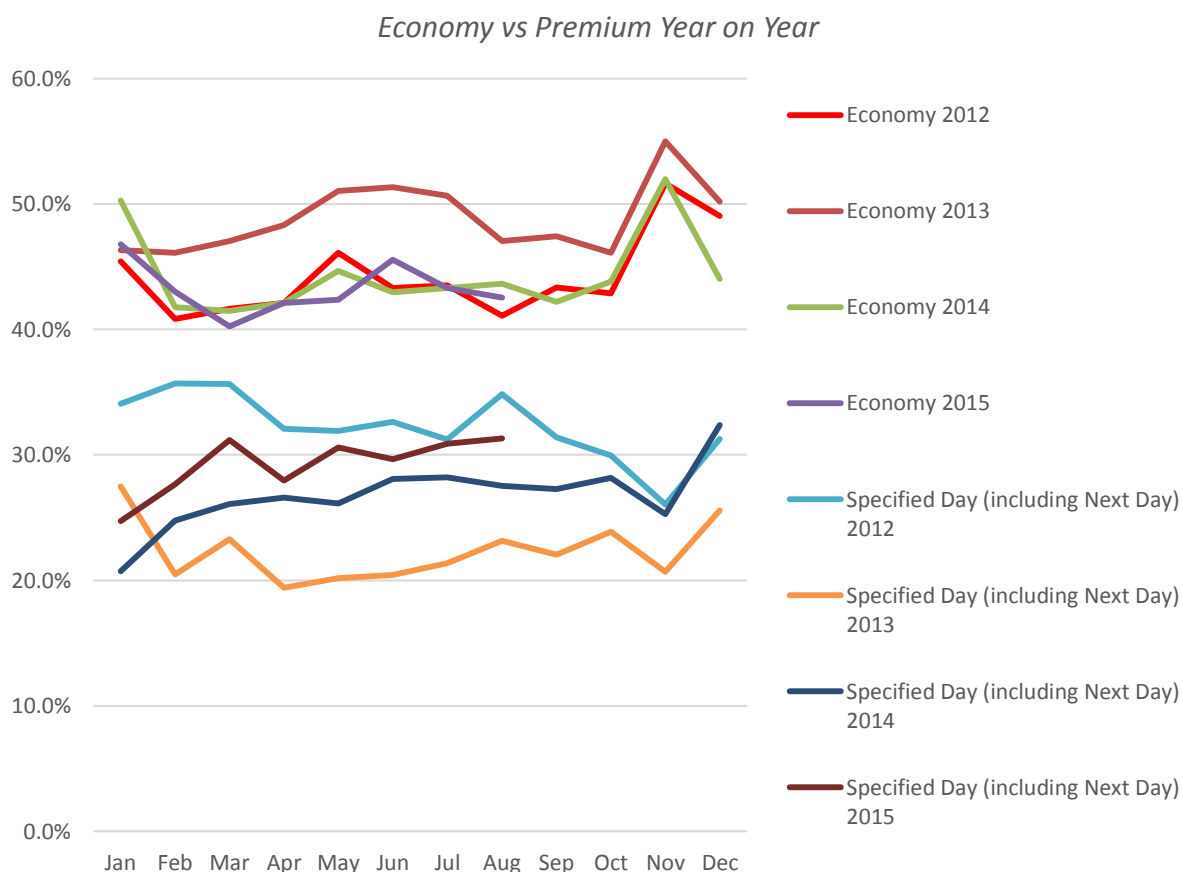
Where necessary we have defined each of the services as follows:

- 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 & 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

The proportion split between Economy services and Specified Day (including Next Day) services, continues to be very stable with Economy taking about 35% more market share.

This should continue for the next two months but as we move into the peak season Economy will pull ahead as shoppers stock up in advance of Christmas while there is still time to use this slower and more cost effective option.



The use of Next Day services typically increase as we enter December and time becomes short. However this year we may see some constraints placed on the use of these services around the Black Friday weekend with the number of Next Day orders accepted by carriers restricted in order to maintain service quality.

IMRG and MetaPack recently ran a Pre-Peak Contingency Delivery Forum to help the industry anticipate and plan for this year's peak. A white paper will soon be made available to all IMRG members.

Cross-border volumes continue to track just below last year, as a proportion of total volume. We explore this further in the next section.

5. Destination Analysis – Percentage of Total Volume

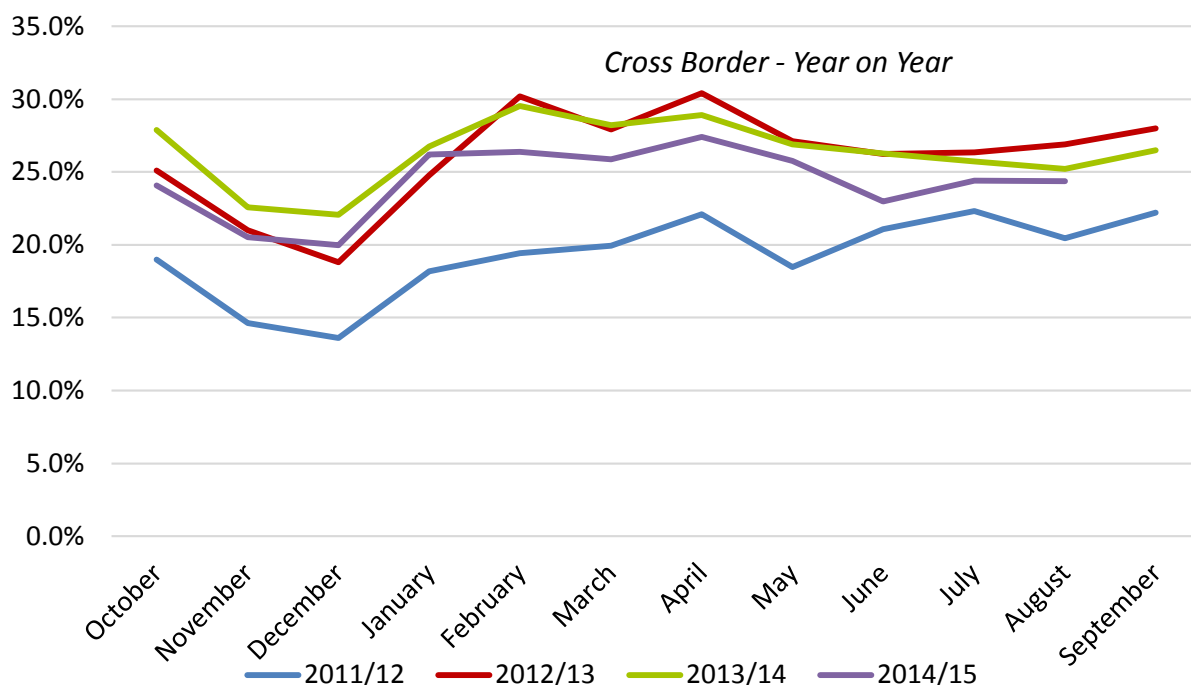
The destination analysis section of the *Index* tracks the percentage of parcels and orders distributed to the various regions of the UK and also confirms the level of cross-border orders sent by the retailers represented. MetaPack has provided data from more than 200 retailers. Using all of the major carriers, this dataset averages in excess of 6 million orders in any one month and approaching **250 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.).

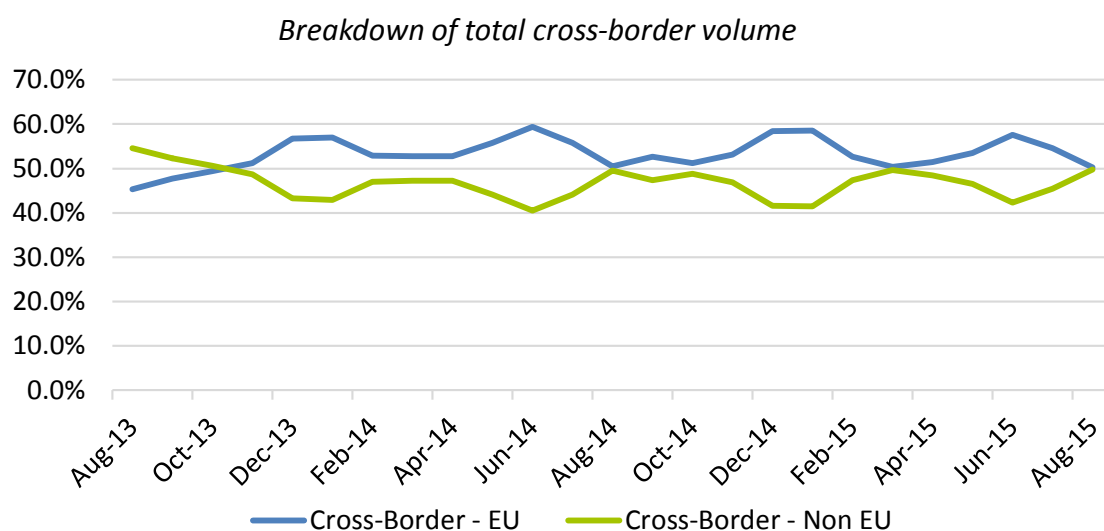
Month and Year	EAST MIDLANDS	GREATER LONDON	ISLE OF MAN	NORTH EAST	NORTH WEST	NORTHERN IRELAND	SCOTLAND	SCOTTISH ISLANDS
Sep-14	8.5%	14.4%	0.1%	5.6%	9.2%	1.8%	6.4%	0.04%
Oct-14	8.9%	14.8%	0.1%	5.9%	9.5%	1.7%	6.6%	0.03%
Nov-14	9.4%	13.8%	0.1%	6.4%	10.1%	1.9%	7.6%	0.04%
Dec-14	9.2%	14.7%	0.1%	6.0%	10.2%	2.0%	7.25%	0.03%
Jan-15	8.8%	14.8%	0.1%	5.4%	9.2%	1.7%	6.1%	0.03%
Feb-15	8.7%	14.7%	0.1%	5.4%	9.1%	1.6%	6.3%	0.03%
Mar-15	8.7%	14.3%	0.1%	5.45%	9.4%	1.7%	6.5%	0.03%
Apr-15	8.6%	14.15%	0.1%	5.4%	9.3%	1.6%	6.15%	0.03%
May-15	8.75%	14.4%	0.1%	5.5%	9.4%	1.6%	6.5%	0.03%
Jun-15	9.0%	15.1%	0.1%	5.5%	9.5%	1.7%	6.7%	0.03%
July-15	8.8%	15.2%	0.1%	5.4%	9.6%	1.55%	6.3%	0.03%
Aug-15	8.8%	14.8%	0.1%	5.3%	9.5%	1.65%	6.7%	0.03%
Month and Year	SOUTH EAST	SOUTH WEST	WALES	WEST MIDLANDS	BFPO	CROSS-BORDER	% CROSS BORDER TO EU	% CROSS BORDER TO NON-EU
Aug-14	12.9%	5.5%	3.4%	6.3%	0.01%	25.2%	50.5%	49.5%
Sep-14	12.8%	5.4%	3.2%	6.1%	0.01%	26.5%	52.7%	47.3%
Oct-14	13.1%	5.65%	3.4%	6.4%	0.01%	24.1%	51.2%	48.8%
Nov-14	13.75%	5.9%	3.7%	6.8%	0.02%	20.5%	53.15%	46.85%
Dec-14	14.0%	5.9%	3.7%	6.9%	0.01%	20.0%	58.4%	41.6%
Jan-15	12.7%	5.4%	3.15%	6.4%	0.01%	26.2%	58.6%	41.4%
Feb-15	12.7%	5.45%	3.2%	6.3%	0.01%	26.4%	52.6%	47.4%
Mar-15	12.9%	5.6%	3.25%	6.2%	0.01%	25.9%	50.3%	49.7%
Apr-15	12.6%	5.4%	3.2%	6.1%	0.01%	27.4%	51.5%	48.5%
May-15	12.9%	5.5%	3.3%	6.2%	0.01%	25.75%	53.5%	46.5%
Jun-15	13.7%	5.8%	3.4%	6.4%	0.01%	23.0%	57.6%	42.4%
July15	13.2%	5.7%	3.5%	6.35%	0.01%	24.4%	50.5%	49.7%

Commentary

As mentioned in the previous section, cross-border volumes continue to track below last year as a proportion of all volumes but where we usually see a small drop in July, this year the upward trend has been maintained.



As much of Europe goes on holiday it is not surprising to see the proportion of orders being sent to non-EU destinations increase.

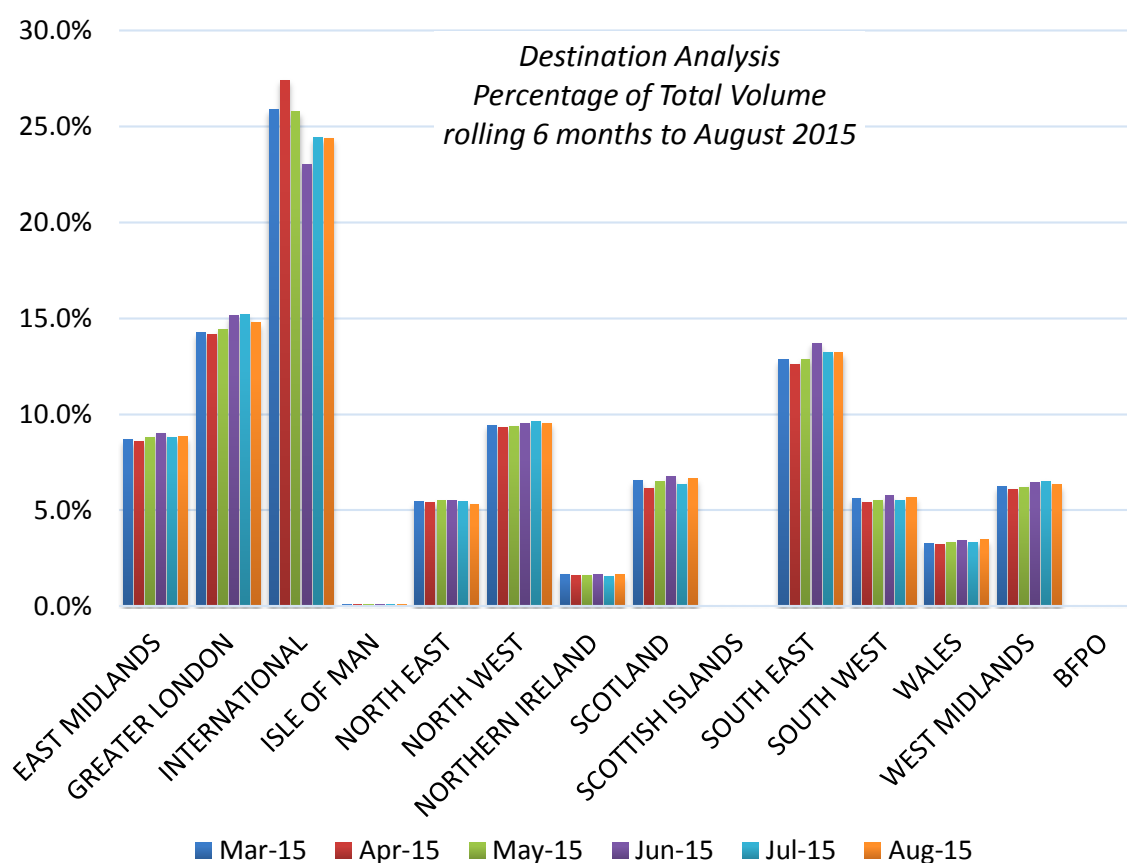


On the back of the slight unseasonal increase in cross-border orders, the weighted average for the proportion of orders being sent cross-border over the past 12 months of the Index is up on last month, at 25.9%.

To help IMRG retailer members with cross-border trading, IMRG runs a 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://imrg.org/cross-border-passports>. Members can already download passports for UK, China and Russian with Germany and Australia to be added this month.

In association with eCommerce Worldwide, IMRG will be hosting a major cross-border event on the 24th September in London. <http://www.imrg.org/ecommerce-worldwide-cross-border-summit> where it will be launching its 2 new passports for Germany and Australia. All IMRG members are welcome at this event.

Within the UK (excluding International volumes) Greater London and the South East still represent the largest proportion of volume for the month with collectively 37% of the overall volume, which is down 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 6 million orders in any one month or the cumulative volume of almost **260 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.

	Mar- 15	Apr- 15	May- 15	Jun- 15	July- 15	Aug- 15
Percentage On Time Delivery	94.6%	93.9%	94.1%	94.5%	95%	91.05%
Variance on previous month	100.1%	99.3%	100.1%	100.5%	100.5%	95.8%
Variance on initial month	102.5%	101.8%	102%	102.4%	103%	98.7%
Percentage Carded – All Orders	2.86%	2.76%	3.12%	2.84%	2.61%	2.6%

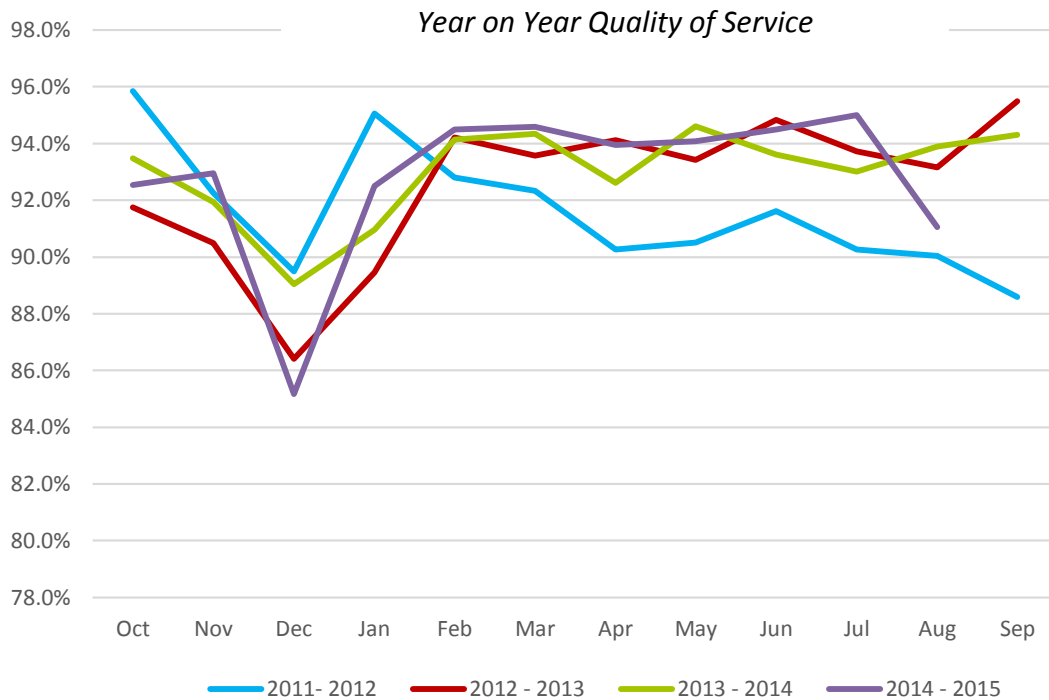
Commentary

Against other positive signs this month is a concern over a fall in the level of on time delivery.

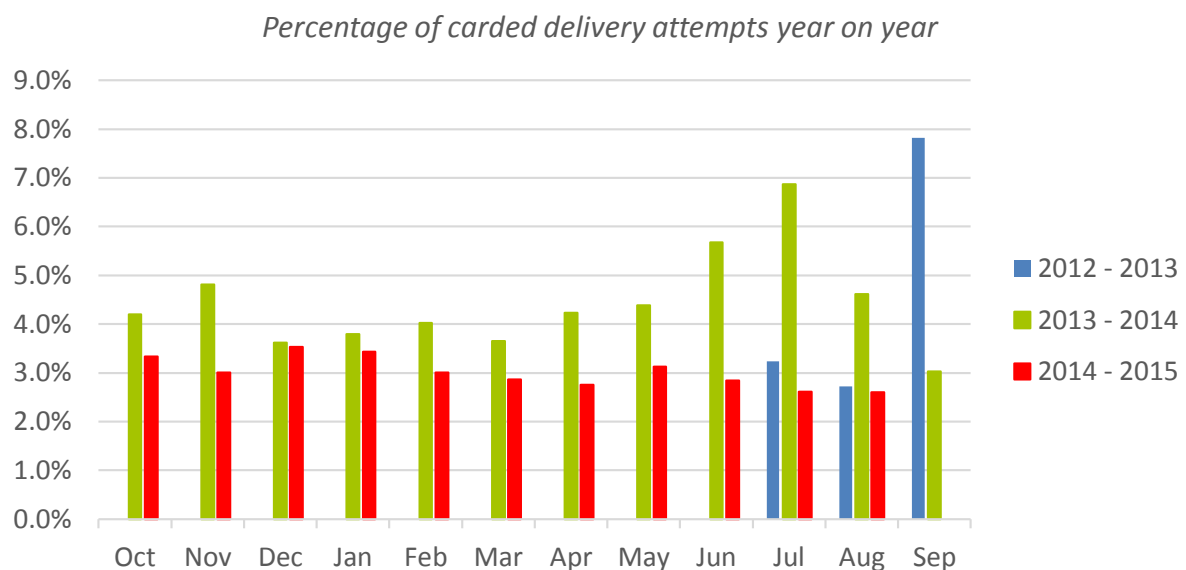
The chart below shows that a drop in this quality of service measure is not unheard of in August as supply chain personnel and delivery agents need their holidays too.

This tends to lead to an increase in the level of temporary staff and drivers covering less familiar routes with an associated drop in productivity. The concern this month is around the steep decline against the high levels of performance we have seen for the majority of the year and the fact that this is well below the levels seen over the past two years.

It will be important to see these performance levels recover next month and to establish themselves at the previous high in readiness for what will be a record breaking peak period.



Alongside this measure the level of first time delivery appears to be holding up well due to the increased use of safe place delivery, click & collect and pre-delivery advice services.



Overall we currently estimate that the proportion of orders not meeting the shopper's expectations (on time / first time) over the past 12 months (rolling weighted average) is about 10.4%. This represents about 90 million orders using current volume estimates.

This is much improved on previous years but we must acknowledge that as performance improves, customer expectation increases and it is a continual challenge for both retailers and their supply chain partners to keep pace.

This challenge is examined in detail within the 7th IMRG Blackbay UK Consumer Home Delivery Review 2015 which is available for free download by all IMRG members from the IMRG website.

6.1 Addressing

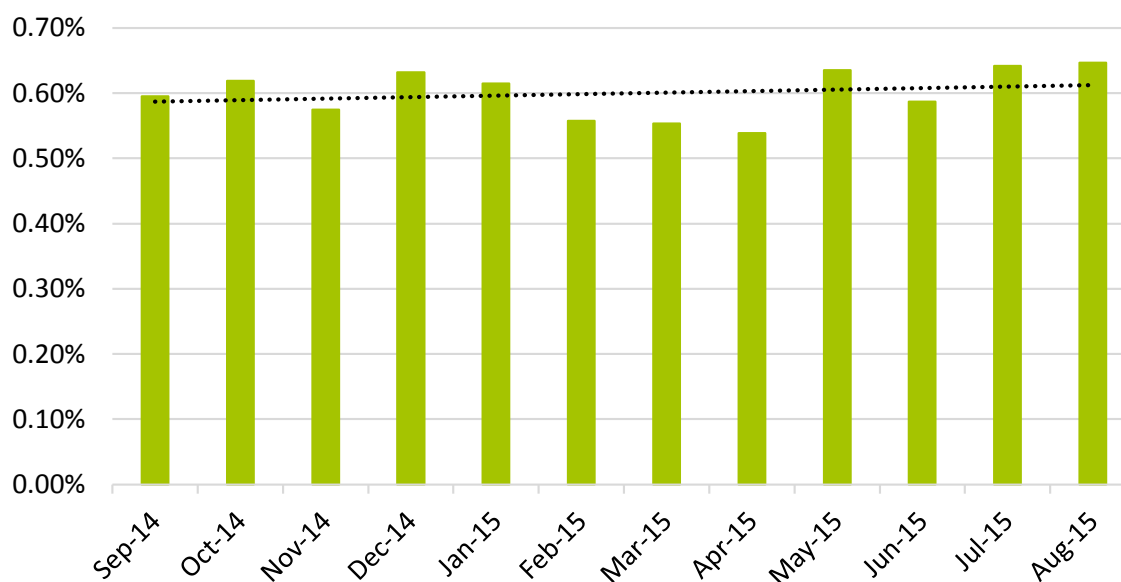
The *Delivery Index* shows the level of all address queries which may have affected delivery performance.

	Mar-15	Apr-15	May-15	Jun-15	July-15	Aug-15
Percentage of Address Queries – All Orders	0.55%	0.54%	0.63%	0.59%	0.64%	0.65%

Commentary

The level of delivery problems caused by poor or inadequate addressing remain consistent and do not appear to be specifically affected by seasonal variations. Clearly address capture and translation tends to work well in this sector.

Percentage of Address Queries Raised - 12 months rolling



Taking the weighted average over the past 12 months and using current volume forecasts, this problem is affecting perhaps 6 million order per annum.

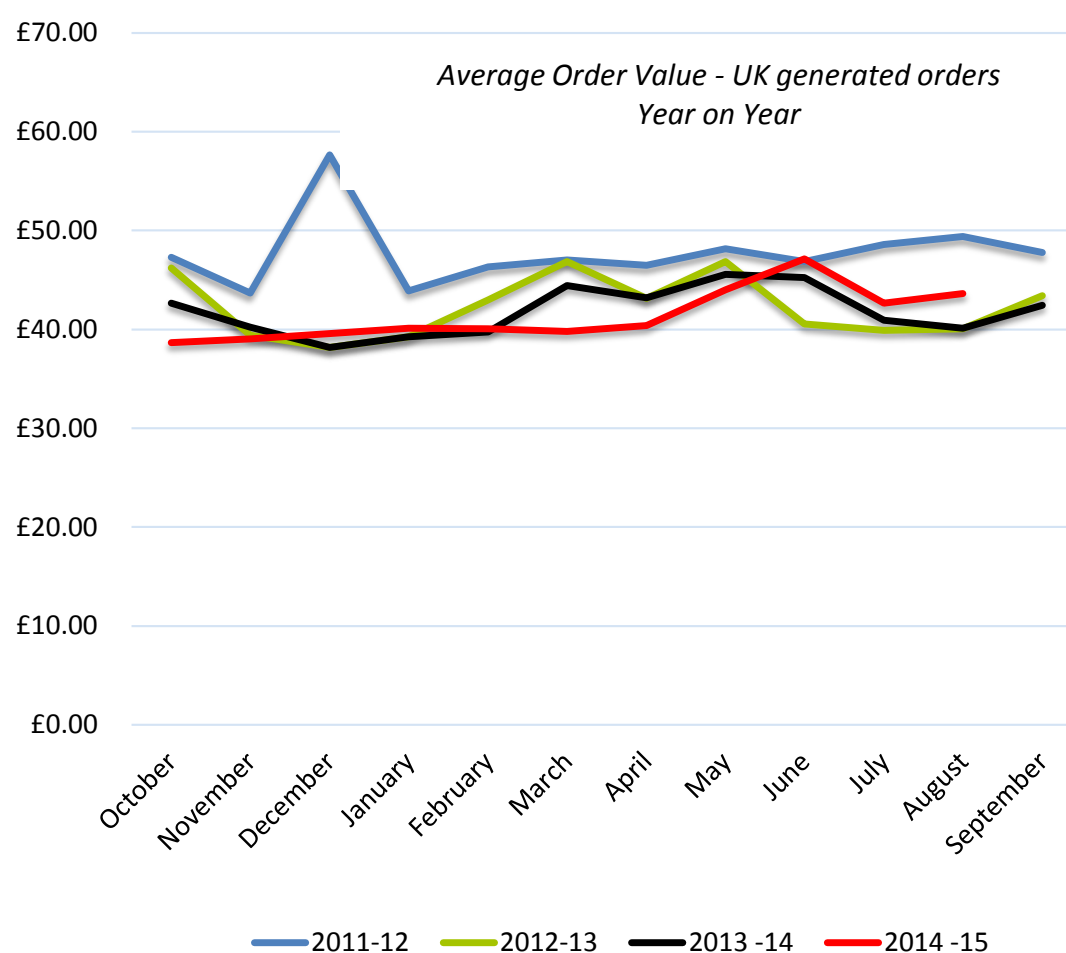
7. Average Order Value (AOV)

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	Mar- 15	Apr- 15	May- 15	Jun- 15	July- 15	Aug- 15
All destinations	£39.77	£40.41	£44.00	£47.15	£42.67	£43.63
UK to UK Orders	£37.30	£38.48	£42.29	£45.66	£41.41	£42.55
UK to EU Orders	£53.86	£53.95	£56.36	£57.51	£52.44	£51.93
UK to non EU Orders	£59.56	£56.43	£54.72	£59.18	£50.82	£48.54

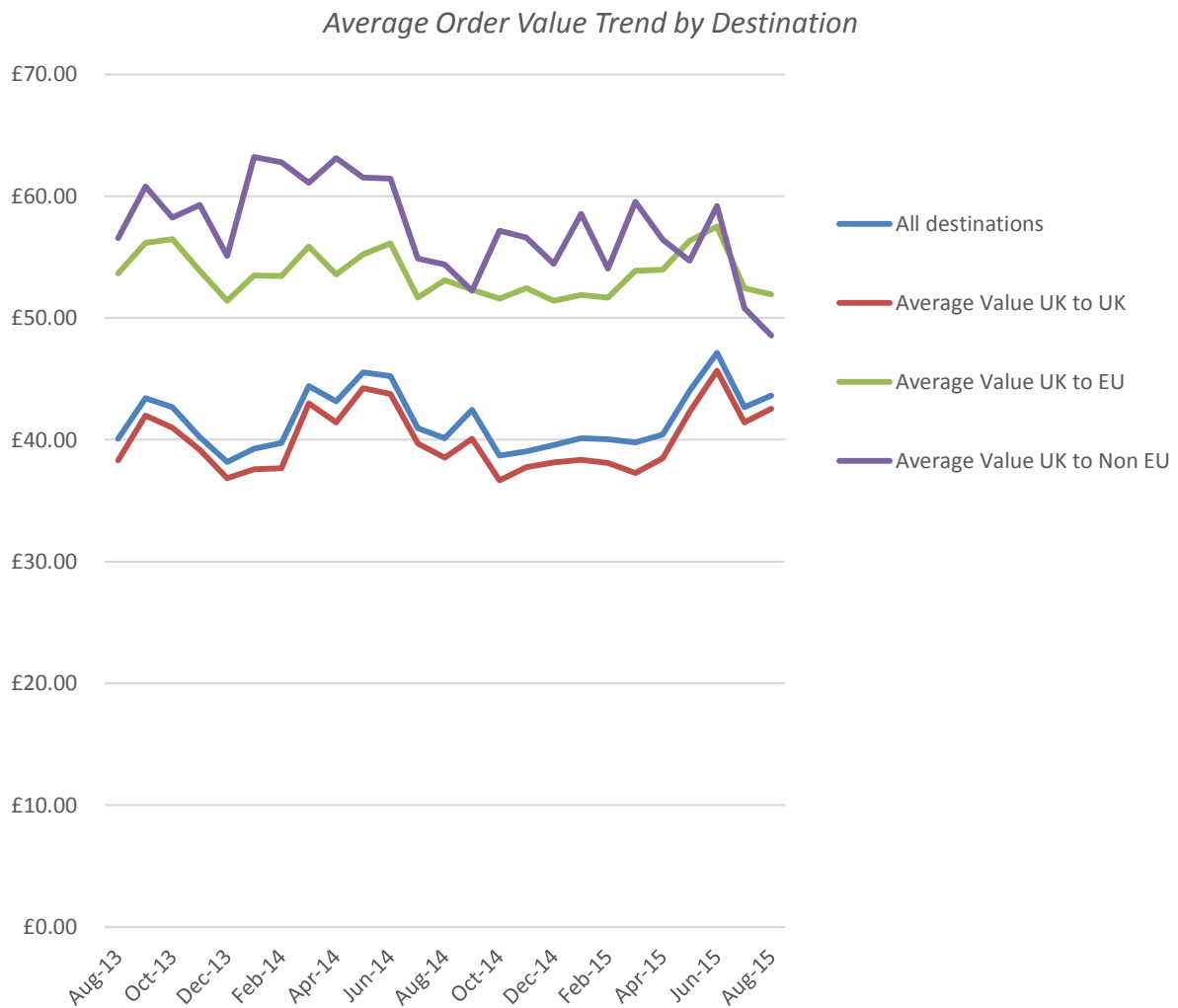
Commentary

On the back of a strengthening economy and apparent consumer confidence the average order value for parcel orders continues the positive trend seen over the past few months.



This month sees an improvement of 2.2% on last month and nearly 9% on the same month last year.

Confirming the impact of the recovery of the UK market we can see that this improvement has been largely driven by domestic consumers with AOVs for cross-border orders falling in consecutive months.



Across the UK's main cross-border markets over the past 12 months both the euro and Australian dollar have had less purchasing power for UK goods (with the US dollar holding ground) and this may lead to shoppers spending the same in local currency but that translating to lower values in sterling?

Overall the weighted average order value for parcel deliveries over the past 12 months and for all destinations is slightly up on last month at £41.43.

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 to the fact that 2015 contained an election and the possibility of interest rate rises towards the end of the year, we expected consumers to be a little more cautious in 2015. At this time our full year volume forecast for 2015 was for 13% growth.

This is consistent with other forecasts we have seen from a major investment bank placing growth at between 10% and 15%. We have also 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 & collect orders that are specifically delivered to store or third party outlets by carriers but does not include all click & collect volumes. See below.

As we move into Q3, the early slow start to the year seems to have passed and we are now exactly on track to achieve the start of year forecast and this is reflected in the chart at the end of this section.

Click & collect

Retailers are now adopting 'In Store' click & collect and reserve & 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 & collect and reserve & 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 & collect / reserve & collect fluctuates with the seasons and that in first quarter of 2015 (to April 2015) the average for multi-channel retailers increased to 22% compared with 16% for the same period last year.

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 3rd party collection networks.

We currently estimate that click & collect overall represents about 12% - 15% of orders with half of this being delivered to stores or 3rd party collection networks by carriers and the remainder fulfilled from store shelf stock or inventory delivered as part of the normal store replenishment process.

As more retailers develop and refine their click & 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.

In order to support the development of this delivery channel IMRG recently published a definitive UK Click & Collect Review which is available to all IMRG members to download for free from the IMRG website.

Cross-Border

In section 5 we offer the view that although the *Delivery Index* has a weighted 12 month average at just below 26% 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 parallel market sizing exercises we have undertaken. This gap is likely to close during 2015 as more retailers trade cross-border.

Given our observation that the growth in the proportion of cross-border orders appears to have stalled over recent months, we consider it prudent to revise our growth forecast for subsequent years. Although this year there has been a decline in the proportion of cross-border orders when compared to last year we do expect this to at least remain steady 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 and thereafter adjust our annual growth rate to 5% on the proportion of orders being sent cross-border.

We will continue to review and adjust this as data become available but we consider it likely that UK cross-border e-retail volumes will stabilise at between 20% and 25% of all volumes dispatched.

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%.

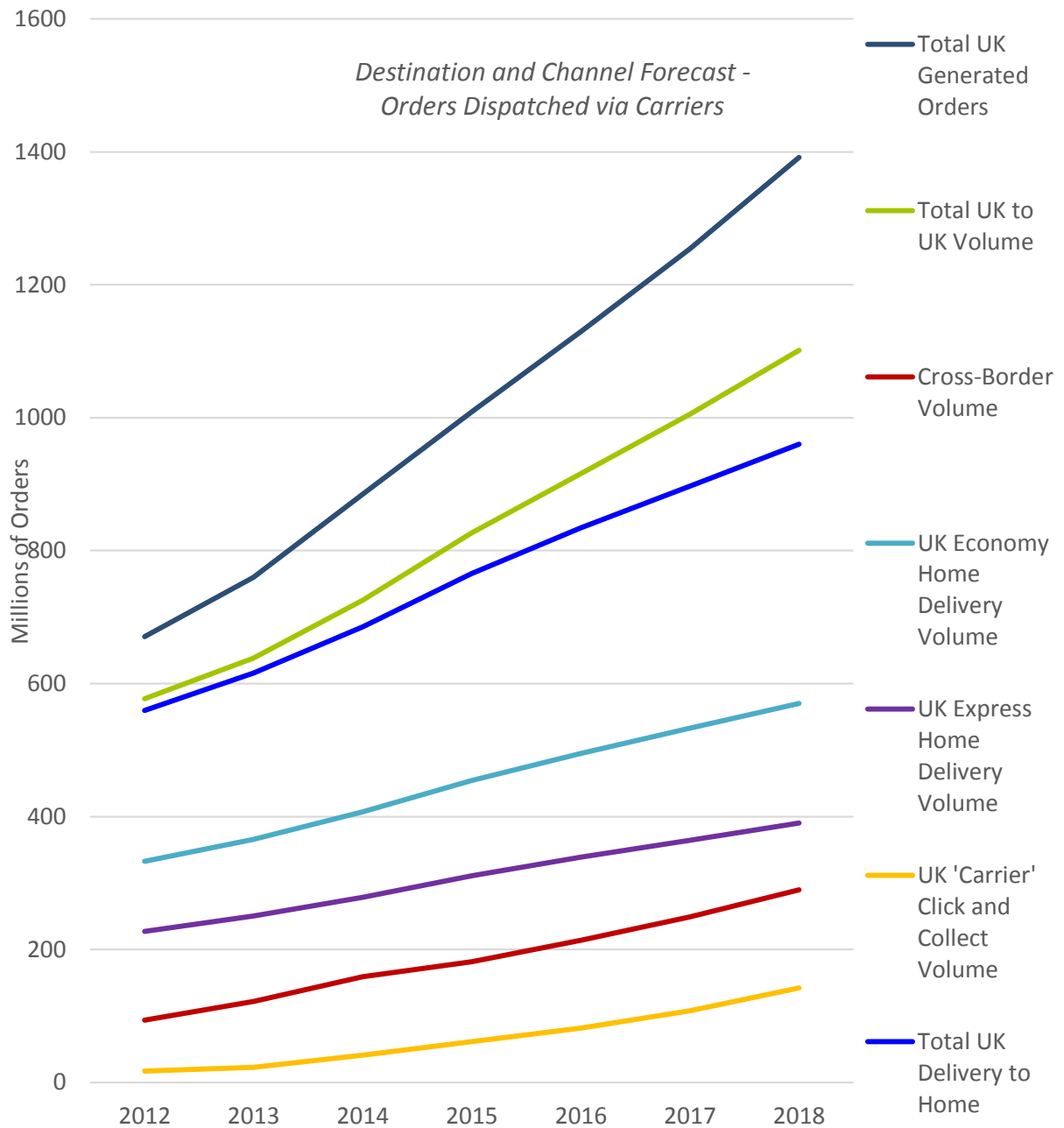
Over the past 18 months we have seen increasing delivery costs and enhancements to Economy services (allowing consumers to receive tracking information and pre-delivery alerts) drive this trend but it now seems to be finding a new equilibrium and the trend has steadied.

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 2015 and 2018 described in the chart below which takes our annual forecast and current performance at 13%.

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



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 or email 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 or email 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 or andrew@spiral4solutions.co.uk.