



# IMRG MetaPack UK Delivery Index Report

March 2017



*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 220 retailers and now represents more than 6 million orders in any single month and £4 billion order value in any 12 months.*

*The March 2017 IMRG MetaPack UK Delivery Index covers the period to the end of February 2017 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 more than 220 retailers and an average of more than 6 million orders in any one month representing £4 billion in order value in any 12-month period, 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).

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

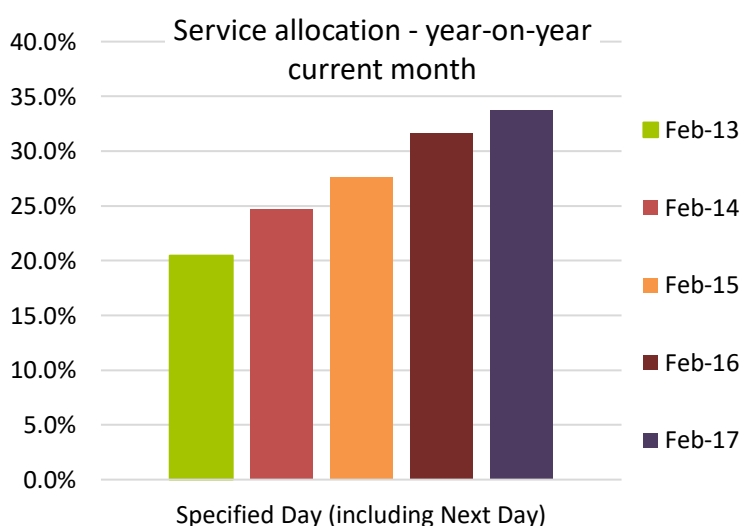
**Andrew Starkey**, Head of e-Logistics, IMRG  
& **Chris Hoskin**, Head of Marketing, MetaPack

## 2. Executive Summary

A strong year-on-year volume growth of 15.8% has moved us ahead of our 11% rolling forecast for 2017, to 13.3% for the first two months of the year.

Within this we have seen the highest use of Specified Day (including Next Day) delivery services of any February since the start of the index and without a seasonal reason driving this demand we suggest that it is due to retailers using Next Day delivery services as a marketing device to attract and retain customers.

The increase in Next Day delivery may also be a reason why unadjusted on time delivery performance is below that of last year.



Cross-border order volumes and average order values continue to increase, driven by the relative weakness of sterling against other major currencies.



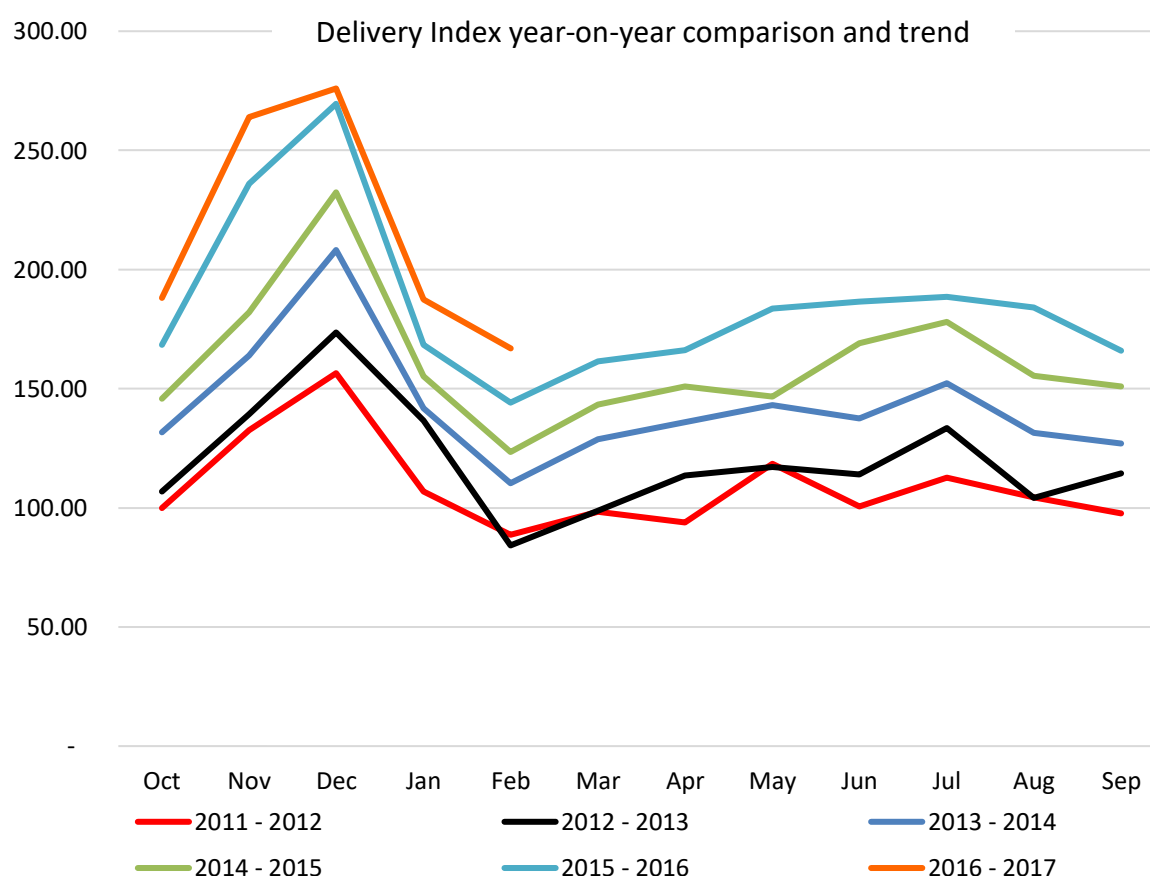
### 3. Volume Index

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 more than **400 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.

	Sept -16	Oct -16	Nov -16	Dec -16	Jan -17	Feb -17
Month on Month Change	-9.8%	13.4%	40.3%	4.5%	-32.1%	-10.9%
Index	165.98	188.18	263.98	275.98	187.36	166.89

#### Commentary

As predicted last month, February has produced a month-on-month drop in terms of delivery volume but this is completely on trend.

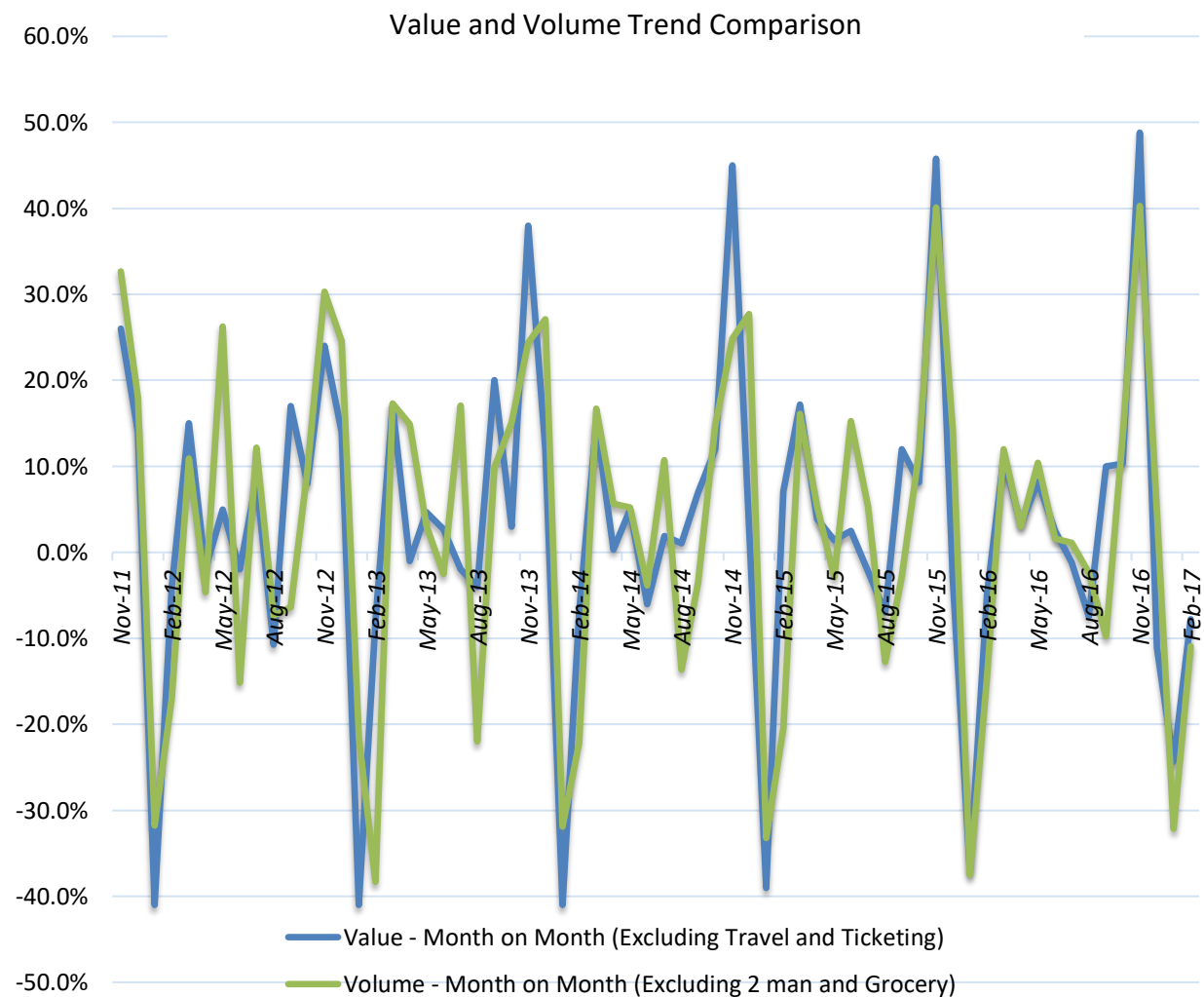


However, this month did deliver a slightly better performance than January and the 15.8% year-on-year growth (Feb 2016 – Feb 2017) has pulled the first two months of the year ahead of our 11% forecast to 13.3% overall.



As usual, to check our analysis 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.

The chart below shows that both independent indexes show the same overall picture.



Should this rate of growth be maintained throughout 2017, we estimate 1.35 billion parcels / 1.3 billion orders will be sent by UK retailers through UK carrier networks this year.



## 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 220 retailers, using all the major carriers and covering all the mainstream services seen below. This dataset averages more than 6 million orders in any one month and more than **385 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
Mar-16	0.46%	0.1%	38.5%	0.65%	25.5%	32.4%	0.2%	0.06%	1.3%	0.9%
Apr-16	0.4%	0.1%	37.9%	0.75%	27.9%	30.1%	0.17%	0.06%	1.6%	0.9%
May-16	0.46%	0.1%	39.2%	0.7%	26.1%	31.2%	0.16%	0.07%	1.3%	0.8%
Jun-16	0.5%	0.1%	37.2%	0.7%	26.9%	32.4%	0.15%	0.08%	1.2%	0.8%
July-16	0.5%	0.1%	37.0%	0.66%	26.66%	32.2%	0.22%	0.07%	1.7%	0.9%
Aug-16	0.6%	0.1%	33.8%	0.7%	27.8%	34.3%	0.15%	0.08%	1.4%	0.9%
Sept-16	0.5%	0.12%	35.55%	0.8%	27.5%	32.7%	0.13%	0.07%	1.66%	0.95%
Oct-16	0.4%	0.1%	36.6%	0.6%	27.8%	31.7%	0.2%	0.08%	1.3%	1.2%
Nov-16	0.33%	0.14%	43.1%	0.5%	24.8%	28.6%	0.2%	0.07%	1.34%	0.9%
Dec-16	0.33%	0.12%	39.2%	0.47%	24.7%	31.9%	0.2%	0.06%	2.03%	0.95%
Jan-17	0.31%	0.08%	35.6%	0.36%	32.33%	29.25%	0.16%	0.02%	1.07%	0.83%
Feb-17	0.3%	0.07%	31.6%	0.42%	33.7%	31.5%	0.12%	0.09%	1.3%	0.84%

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

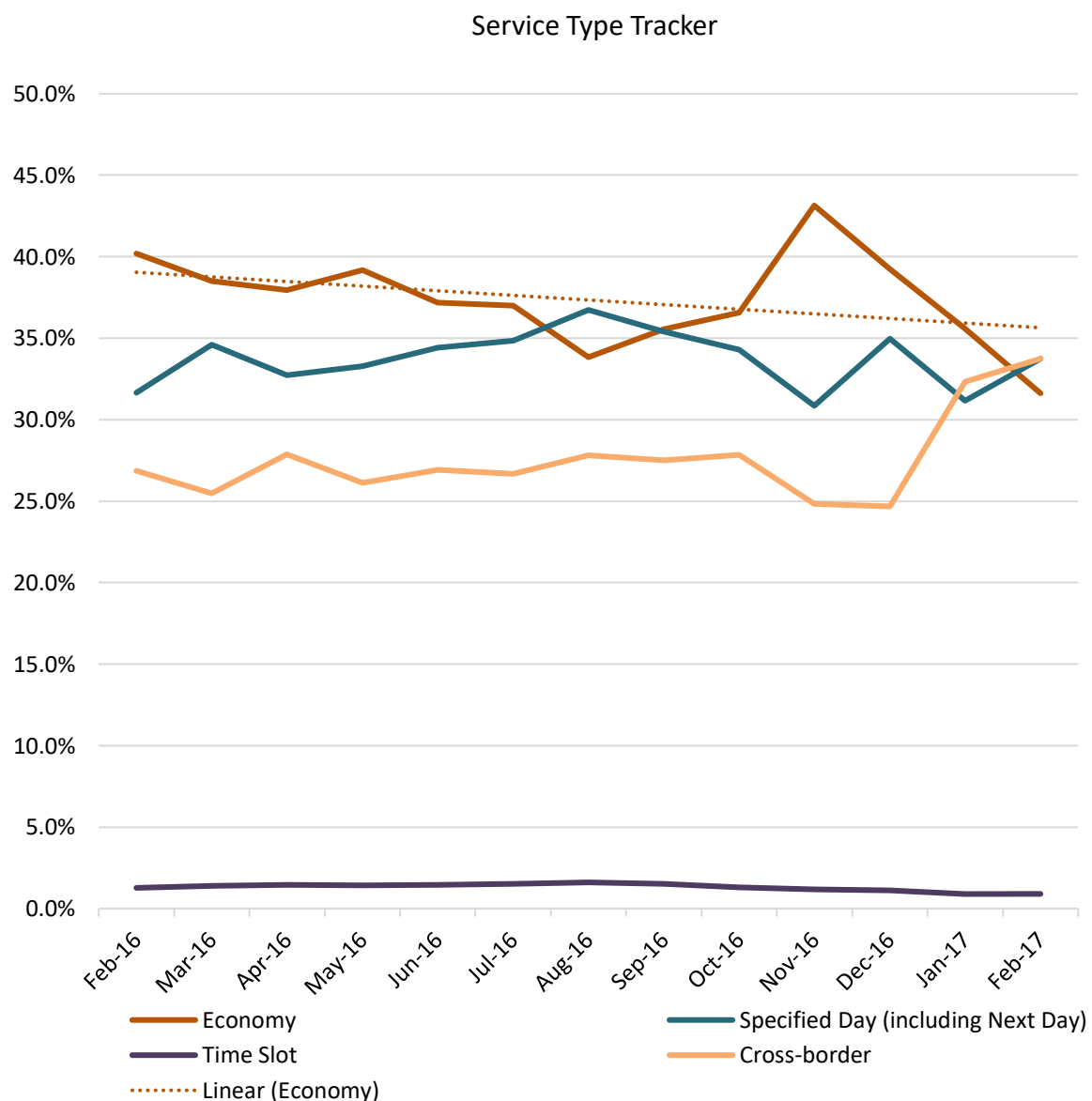
- AM – Delivery before 12:00
- Economy – No assured delivery lead time, no specific delivery day or time-slot
- Evening – Delivery after 17:00
- PM – Delivery after 12:00
- School Run – Delivery between 09:30 and 14:30
- Click & collect services cannot be specifically identified but are usually included within the next day category
- Some 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

Against a very consistent volume trend, it is interesting to see a sustained change in the mix of delivery services being used. For some time now we have been tracking an increase in use of Next Day and Specified Day services as a proportion of the total volume dispatched, although in the past some of this has been driven by seasonal factors.

This February is the first where these services have taken the lead from Economy and there are no exceptional circumstances we can point to for this, only the strategy from retailers to offer Next Day delivery either as standard or at a comparable price to Economy.





## 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 confirms the level of cross-border orders sent by the retailers represented. MetaPack has provided data from more than 220 retailers. Using all the major carriers, this dataset averages more than 6 million orders in any one month and more than **385 million orders** over the life of the *Index* to date.

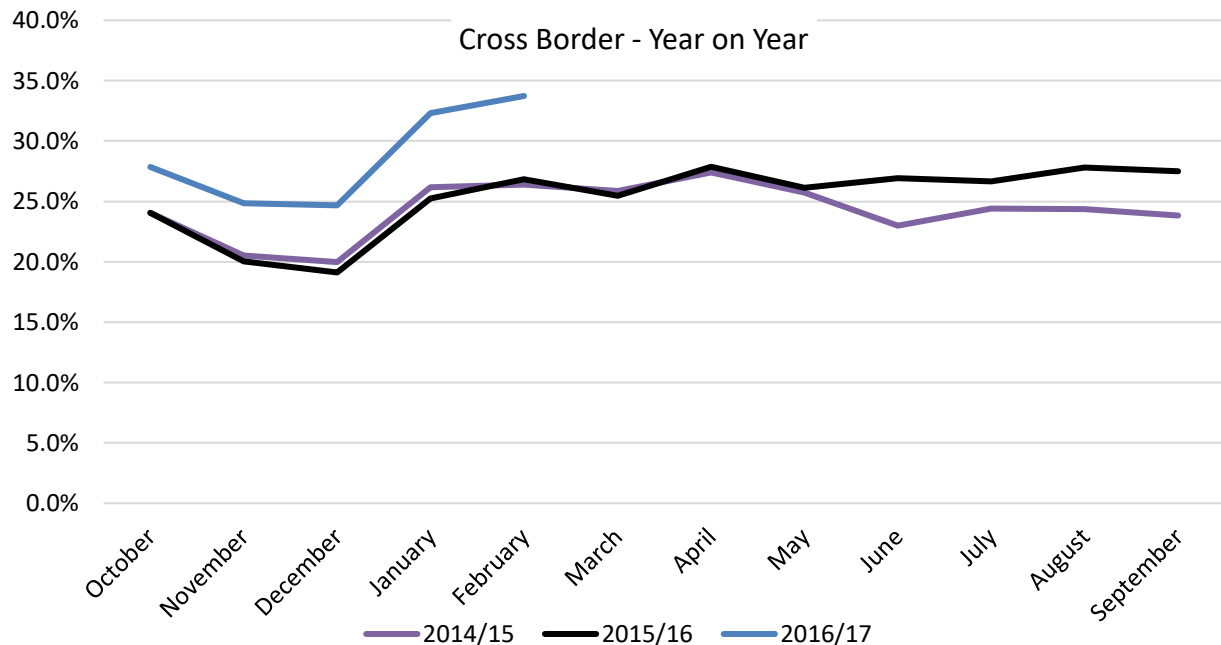
The proportion of orders being sent to international destinations may not be entirely representative of all sales because this figure may be influenced by several major retailers with proactive international strategies. In addition, although all deliveries were dispatched from the UK, some of the orders 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	GREAT LONDON	ISLE OF MAN	NORTH EAST	NORTH WEST	NORTHERN IRELAND	SCOTLAND	SCOTTISH ISLANDS
Mar-16	8.75%	14.2%	0.1%	5.4%	9.6%	1.7%	6.5%	0.03%
Apr-16	8.6%	14.0%	0.1%	5.3%	9.4%	1.7%	6.0%	0.03%
May-16	8.7%	14.4%	0.1%	5.4%	9.3%	1.7%	6.2%	0.03%
Jun-16	8.5%	14.5%	0.1%	5.2%	9.4%	1.7%	6.2%	0.03%
July-16	8.45%	14.9%	0.1%	5.3%	9.6%	1.6%	6.0%	0.03%
Aug-16	8.4%	14.25%	0.1%	5.15%	9.4%	1.65%	6.3%	0.03%
Sept-16	8.35%	14.3%	0.12%	5.2%	9.3%	1.7%	6.3%	0.03%
Oct-16	8.5%	14.1%	0.11%	5.35%	9.3%	1.7%	6.0%	0.03%
Nov-16	9.0%	12.94%	0.13%	5.8%	9.7%	2.1%	7.1%	0.04%
Dec-16	8.74%	13.5%	0.1%	5.6%	9.94%	2.06%	6.76%	0.03%
Jan-17	8.0%	13.5%	0.08%	4.9%	8.64%	1.7%	5.53%	0.03%
Feb-17	7.7	13.2%	0.09%	4.8%	8.4%	1.6%	5.6%	0.03%
Month and Year	SOUTH EAST	SOUTH WEST	WALES	WEST MIDLANDS	BFPO	CROSS-BORDER	% CROSS BORDER TO EU	% CROSS BORDER TO NON-EU
Mar-16	13.0%	5.7%	3.3%	6.2%	0.01%	25.5%	50.6%	49.4%
Apr-16	12.5%	5.4%	3.2%	6.0%	0.01%	27.9%	52.6%	47.4%
May-16	13.0%	5.6%	3.3%	6.0%	0.01%	26.1%	55.8%	44.2%
Jun-16	12.8%	5.3%	3.25%	6.0%	0.01%	26.9%	57.8%	42.2%
July-16	12.7%	5.2%	3.2%	6.2%	0.01%	26.7%	55.3%	44.7%
Aug-16	12.5%	5.3%	3.2%	6.0%	0.01%	27.8%	49.5%	50.5%
Sept-16	12.66%	5.4%	3.15%	6.0%	0.01%	27.5%	48.1%	51.9%
Oct-16	12.5%	5.4%	3.2%	6.1%	0.01%	27.84%	48.6%	51.4%
Nov-16	13.0%	5.6%	3.5%	6.33%	0.01%	24.84%	49.6%	50.4%
Dec-16	13.1%	5.5%	3.5%	6.54%	0.0%	24.7%	56.3%	43.7%
Jan-17	11.66%	5.0%	2.9%	5.8%	0.01%	32.33%	59.2%	40.8%
Feb-17	11.45%	5.0%	2.8%	5.6%	0.01%	33.7%	56.3%	43.7%



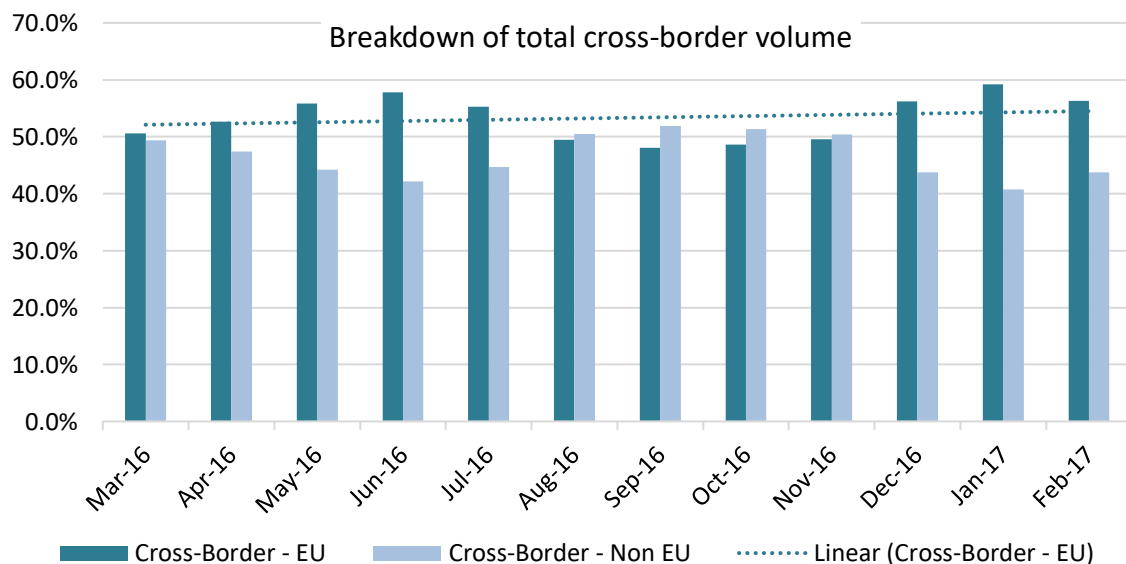
## Commentary

The other trend that continues to change is the destination to which UK orders are being sent with the level of cross-border deliveries well ahead of where they have been for the past two years.



Here the reason is clear and we can track the increase back to June 2016 when the UK voted for Brexit and sterling immediately de-valued against other major currencies.

For cross-border shoppers, the UK is now a 'value for money' destination. The EU is the main source of orders and consumers are at least 10% better off than before the Brexit decision in June 2016. Other destinations fair even better with the US dollar 16% stronger.





Although the FX effect may not continue for ever and once the realities of Brexit take hold (possible duties and charges) UK products may be less attractive, this period may present an opportunity for UK brands to introduce themselves to global consumers.

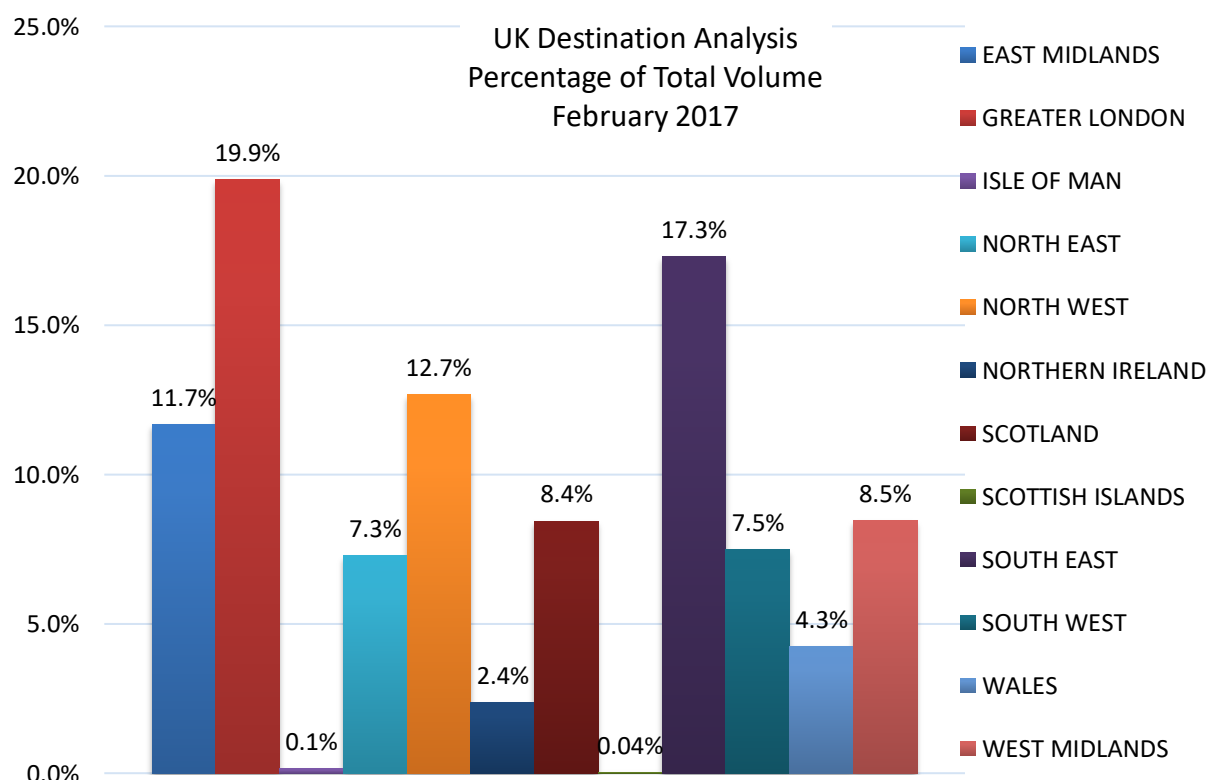
Even if UK prices become less attractive in the future, UK retailers would be wise to use the current situation to build loyal customer bases in these markets, especially as average order values also seem to be generally higher than within the UK. See section 7.

For the moment, we can report that the 12-month rolling weighted average for the proportion of UK orders for cross-border destinations has risen to 27.4% - an increase of 0.5% on the previous month. Taking account of the wider market (including smaller retailers and those not so advanced in their cross-border strategies) it is likely that the average for all UK retailers is nearer 22%.

To help IMRG retailer members, especially those developing their cross-border trade, IMRG provides, in association with eCommerce Worldwide a series of **Cross-border Trading Passports** to provide 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, Russia, Germany, Australia, USA, the Nordics, Eire, Belgium and the Netherlands. The Canadian passport will be published 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 37.15% of the overall volume, which is the same as the previous month.





## 6. Quality of Service

The table 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 more than 6 million orders in any one month or the cumulative volume of more than **400 million parcels**). Some of the orders in question may be bound for international destinations.

For 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 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.

The monthly quality of service results relies on the final tracking status for each delivery and to produce a timely report each month, a cut off is applied. When the final tracking status is outstanding, the delivery is always reported as late to present the most conservative view of industry performance – a worst case.

Clearly when the final tracking status for each delivery is finally received, many are found to have been delivered on time. Adjusted results subsequently improve the monthly published results by between 4% and 5%.

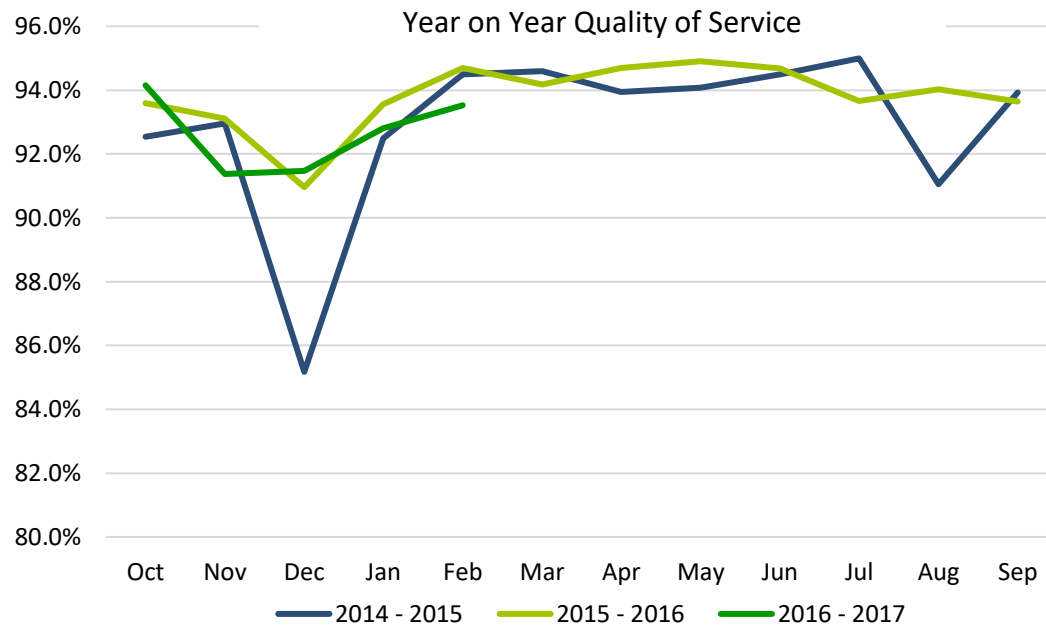
Unadjusted on Time Delivery	Sept- 16	Oct- 16	Nov- 16	Dec- 16	Jan- 17	Feb- 17
% unadjusted On Time Delivery	93.65%	94.15%	91.37%	91.47%	92.8%	93.52%
Variance on previous month	99.6%	100.5%	97.1%	100.1%	101.5%	100.8%
Variance on same month last year	-0.3%	+0.6%	-1.9%	0.6%	-0.8%	-1.2%
Percentage Carded – All Orders	3.72%	3.15%	2.25%	2.68%	2.94%	2.79%

### Commentary

The notable thing about the unadjusted on time delivery performance for the first two months of 2017 is that, despite showing the expected post-peak improvement, it is tracking below the performance level for last year.

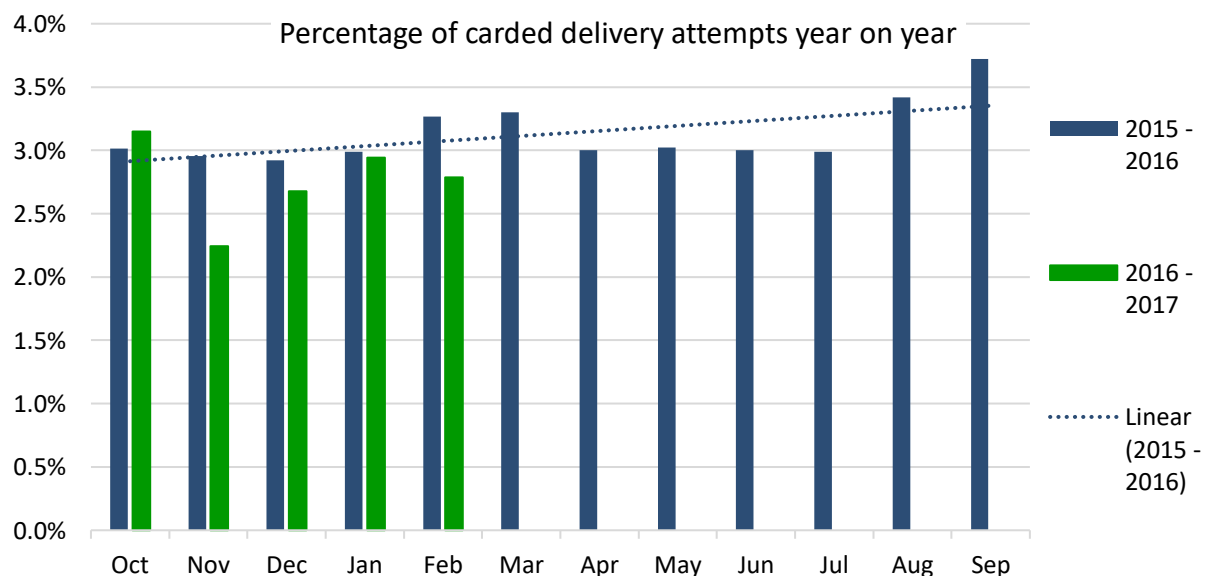
One possible explanation for this may be the increase in use of Next Day delivery services which naturally reduce the delivery time window and make on time delivery that bit more challenging.





The rolling weighted average for on time delivery / attempted delivery over the past 12 months now stands at 93.4% (unadjusted) which is down 0.1% on last month.

First time deliveries represented by the number of 'carded' incidents recorded is consistent below 3% but we should not be complacent when this will represent almost 40 million failed deliveries using this years estimated volume.



The effective use of pre-delivery alerts, click & collect and safe-place delivery all contribute to first time delivery but more work is needed to allow the customer to specify their safe-place or preferred neighbour to bring this number down further.



Taking these two unadjusted measures together, we estimate that at worst case the proportion of orders not meeting the shopper's expectations over the past 12 months (rolling weighted average) is 9.56% which means that 1.17 bn orders can be expected to arrive within the time window expected.

The ongoing challenge of first time / on time delivery is examined in detail within the *IMRG Blackbay UK Consumer Home Delivery Review 2016* (with the 2017 Review scheduled for April) and the *IMRG Blackbay Valuing Home Delivery Review 2016* which are available for free download by all IMRG members from the IMRG website.

## 6.1 Addressing

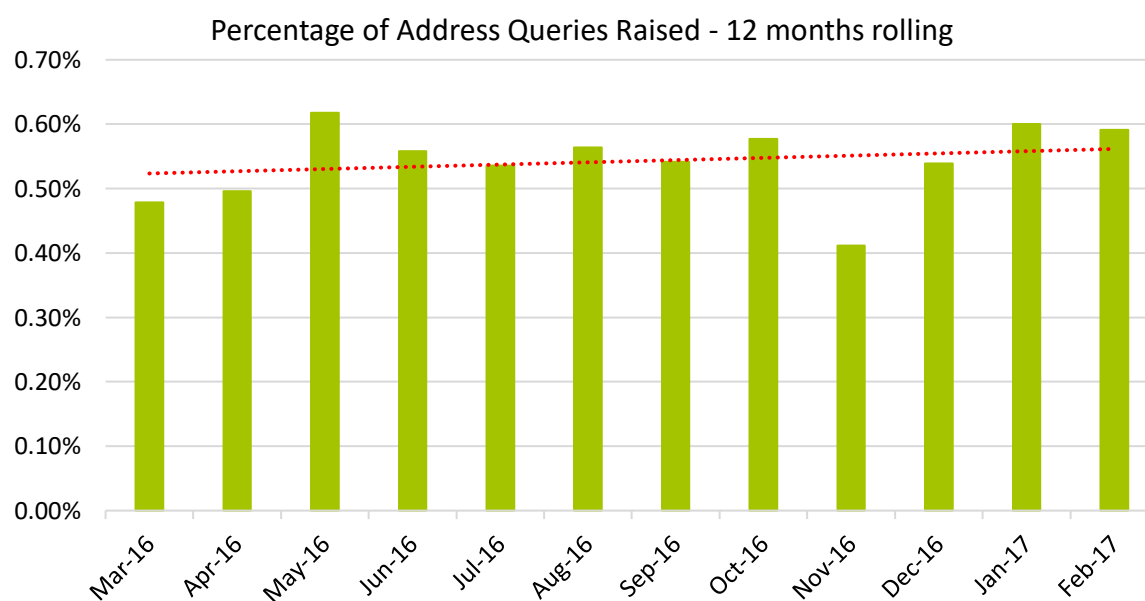
The *Delivery Index* shows the level of all address queries which may have affected delivery performance.

	Sept-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17
Percentage of Address Queries – All Orders	0.54%	0.58%	0.41%	0.54%	0.54%	0.59%

### 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.

Taking the weighted average over the past 12 months and using current volume forecasts, this problem is affecting perhaps only 6.57 million orders per annum.





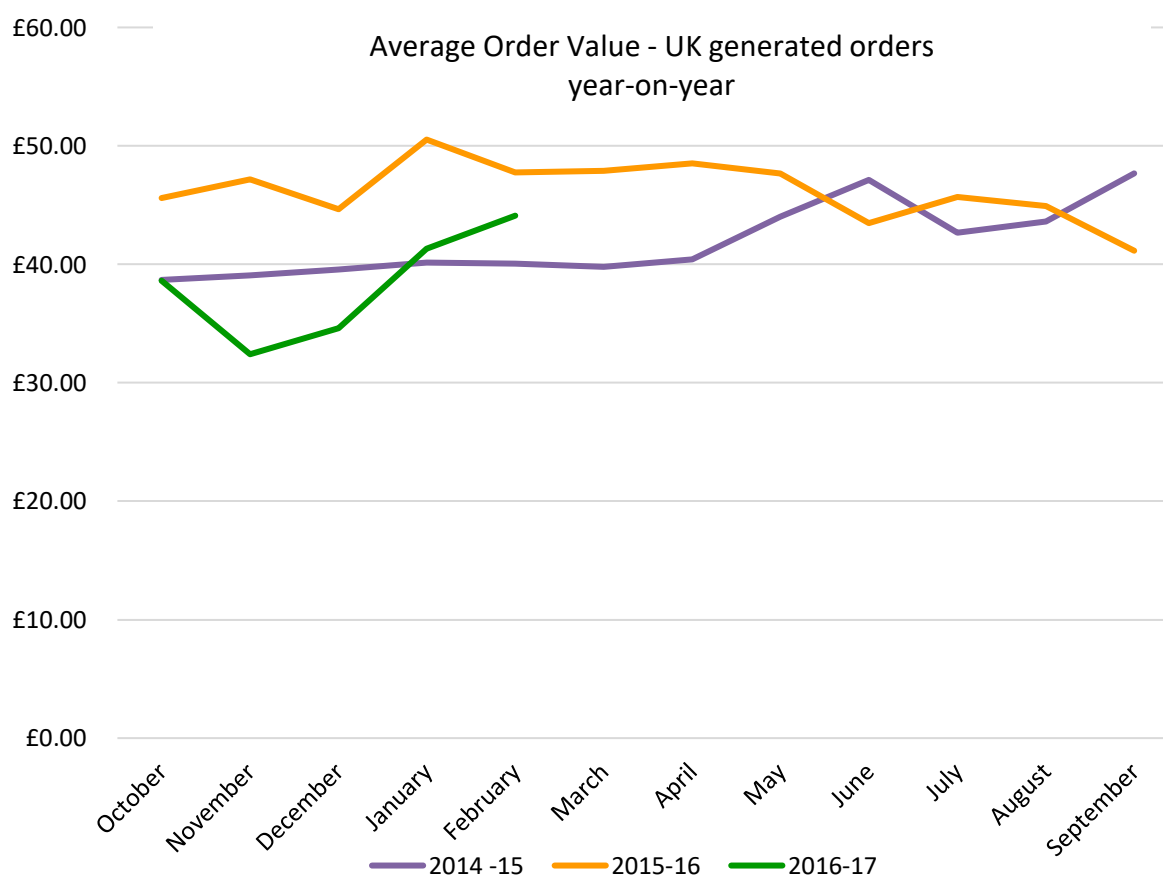
## 7. Average Order Value (AOV)

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 refers only to parcel deliveries and has a lower proportion of higher value '2 Man' deliveries and no Grocery deliveries.

Average Order Value	Sept- 16	Oct- 16	Nov- 16	Dec- 16	Jan- 17	Feb- 17
All destinations	£41.15	£38.60	£32.41	£34.61	£41.32	£44.11
UK to UK Orders	£39.77	£36.85	£30.46	£32.97	£40.04	£42.63
UK to EU Orders	£48.78	£47.71	£41.23	£41.05	£47.56	£50.25
UK to non-EU Orders	£42.40	£42.37	£46.08	£44.87	£44.82	£48.74

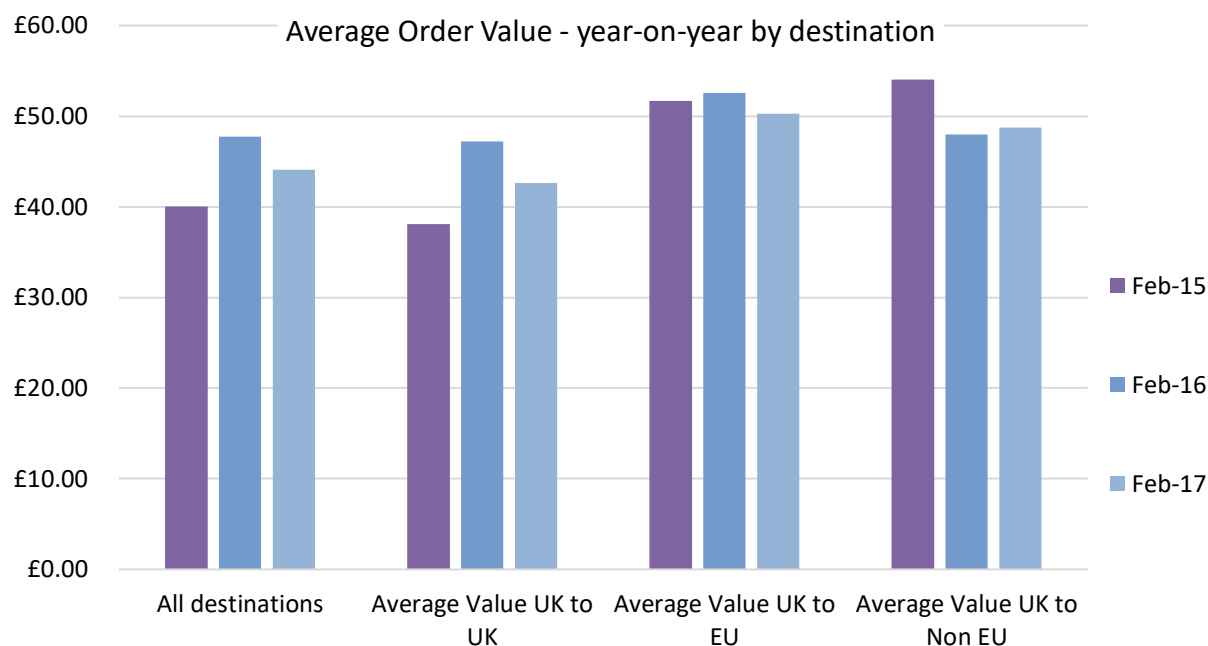
### Commentary

Following a drop in order values in November (Black Friday sales having some impact) and a slight recovery into December, we saw a good start for 2017 with average parcel order values up by almost 20% on December. This improvement has continued into February although we have still not recovered to the levels of spring 2016 and year-on-year February order values are down 7.65% on 2016.

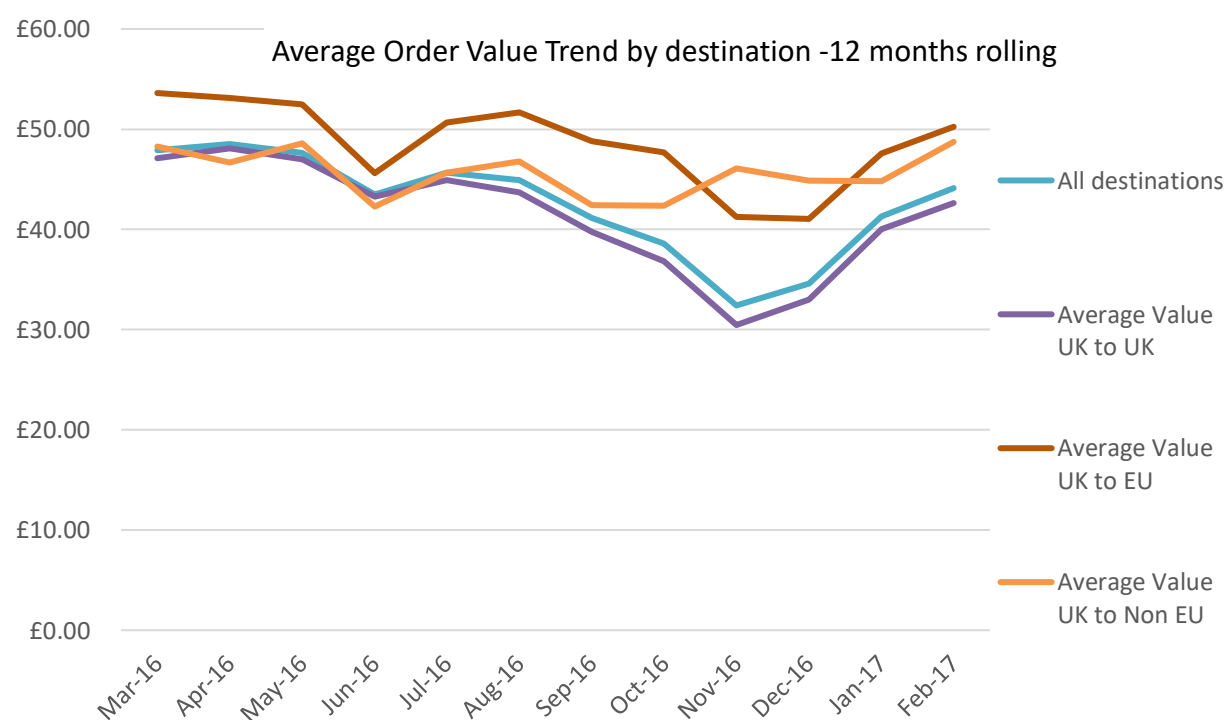




The improvement applies to all destinations but most of it comes from non-EU orders with a 9% month-on-month improvement, no doubt aligned to the strength of currencies like the US dollar allowing non-EU consumers to get very good value for money from UK retailers.



Despite the increase in average order values over the past two months the weighted average order value for all parcel deliveries over the past 12 months, for all destinations, has fallen back again this month from £41.97 to £41.77.





## 8. Forecasts

Taking the data and analysis in the preceding sections and the experience of recent years, we can consider forecasts for the years ahead and refine these as required.

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 2015 with an election and the possibility of interest rate rises towards the end of the year, we expected consumers to be a little more cautious and set a full year volume forecast for 2015 at 13% growth. This was consistent with other forecasts from a major investment bank placing growth at between 10% and 15%.

However, due to a surge in demand following the election and supported by a strong online Christmas we ended 2015 with a growth figure of 15.7%, well ahead of the start of year forecast.

In 2016 we had the EU referendum which has resulted in upheaval in the main political parties, a fall in the value of sterling and uncertainty about the UK's cross-border trading status. The shock result of the US Presidential election may yet add to this.

Despite these significant events we saw good growth through the year and for 10 months were ahead of our start of year forecast of 12%. However, December 2016 provided a new view of how the peak trading period might develop, with an uncharacteristic slow-down in the rate of online sales growth. Much of the peak volume was pulled forward to the end of November and the week before Christmas saw high levels of activity in the high street, in part fuelled by click & collect. As a result, we ended the year just below forecast with 11.2% cumulative growth.

Our forecast for 2017 is 11% parcel volume growth and the extra 15.8% increase in February has moved us ahead of this forecast to 13.3% for the first two months of the year. If this continues we will end the year with 1.3 billion orders / 1.35 billion parcels dispatched by UK retailers.

### Click & collect

2017 will see the continued expansion in the use of click & collect with retailers developing their in-store solutions and third party reach expanding.

The *IMRG Quarterly Benchmark Index* is now tracking a combination of click & collect and reserve & collect orders for leading multichannel retailers at an average of 25%.

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).

We currently estimate that across the year click & collect represents about 15% - 20% of all orders, peaking at Christmas. Perhaps half of this is delivered to stores or 3<sup>rd</sup> party collection networks by carriers and the remainder fulfilled from store using 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 we 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 has published a definitive *UK Click & Collect Review* which is available to all IMRG members to download for free from the IMRG website or from Collect+.

### **Cross-border**

In section 5 we offer the view that, although the *Delivery Index* has a weighted 12-month average at 27.4% of all UK-generated orders, we need a more conservative estimate to cover all UK online retailers of 5 percentage points lower at about 22% for 2017. This gap is likely to close as more retailers trade cross-border and the Brexit decision will certainly have an impact over the next 2 to 4 years. We feel that cross-border growth may slow down during the post-Brexit period commencing 2019, before picking up again after 2021.

We will continue to review and adjust this as data becomes available but we consider it likely that UK cross-border e-retail volumes for all retailers will eventually stabilise at about 28% of all volumes dispatched.

### **Carrier delivery services**

At the start of the *Index* the proportion of orders sent by Economy and Specified Day / Next Day services was about equal but Economy services becoming more in demand as shoppers sought value for money. More recently we have seen the Next Day services once again close the gap on Economy services as retailers provide enhanced delivery offers to attract and keep customers.

Excluding international volumes, the 12-month rolling average for these services is 51.3% Economy and 46.9% for Specified Day services including Next Day. If Next Day continues to be used as now, this rolling average will certainly change and the gap will close further.

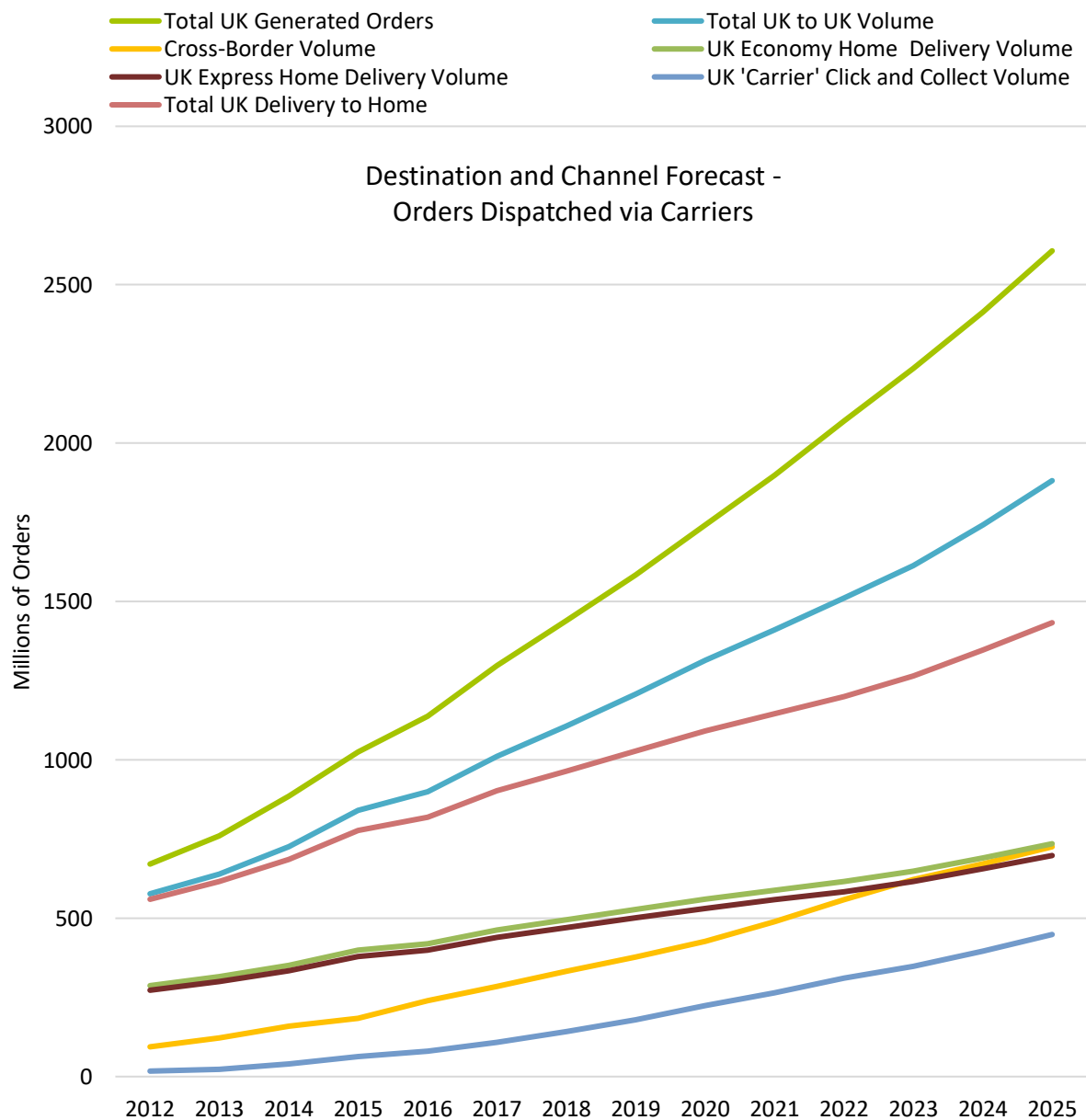
We use these figures for our forecast and update them on a monthly basis to reflect the correct allocation in real time.

### **Channel and service forecast**

Applying these values and assumptions together may produce a future picture as described in the chart below. Given the fact that 2016 eventually came in slightly below forecast we feel the projection of a maturing market with lower growth over the next 10 years to be realistic.



Year	Forecast
2016	12% - Achieved 11.2%
2017	11% - year to date 13.3%
2018	11%
2019	10%
2020	10%
2021	9%
2022	9%
2023	8%
2024	8%
2025	8%
2026	8%





## 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 e-commerce and multi-channel delivery technology to leading retailers. MetaPack's highly configurable SaaS 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 400 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 4,500 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. Shipping over half a billion 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 35 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).