



2018 STATE OF ECOMMERCE DELIVERY

METAPACK CONSUMER
RESEARCH REPORT



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INTRODUCTION

CONSUMER DELIVERY EXPECTATIONS UNWRAPPED

The eCommerce battleground is increasingly focused on who can best meet growing consumer expectations for shopping experiences that are simple, fast, reliable and – above all – convenient. 61% of consumers say a positive delivery experience incentivises them to shop with an e-tailer again.

Customer-centric delivery now represents a key differentiation point for e-tailers looking to win the biggest share of consumer spend.

Providing deep insights into what consumers want when it comes to delivery, the 2018 State of eCommerce Delivery: MetaPack Consumer Research Report examines how the delivery choices shoppers encounter influence the purchasing decisions they make.

This year's report unwraps the consumer delivery expectations. It reveals how today's consumers increasingly expect to be able to curate their own delivery experience – determining exactly when, where and how they receive their online purchases including which carrier is trusted with the delivery of their goods.

STUDY METHODOLOGY

Research was conducted online in July 2018 with 3597 consumers in Canada, France, Germany, the Netherlands, Spain, the UK and the US on behalf of MetaPack by Research Now, a global leader in digital data collection.

Aged 18 or over, all survey participants had made an online purchase in the last six months and the survey sample was designed to ensure equal respondent weighting between the seven geographic regions within which the fieldwork was undertaken: Canada (511), France (510), Germany (510), the Netherlands (509), Spain (510), the UK (528) and the US (511).

To ensure census balancing, the respondent sample was managed to ensure equal weighting in terms of the age and gender of consumers surveyed for each country, and between countries. In terms of gender, a total of 1833 males and 1764 females were surveyed. Demographic data on respondent age was collated in the following age groups: 18-26 (349), 27-38 (1139), 39-52 (1001), 53-64 (704), 65+ (404). Millennials are defined as consumers aged 18-25 throughout the report.

EXECUTIVE SUMMARY



An excellent consumer delivery experience can be a key differentiator for retailers and brands.

Retailers who meet consumers' needs win loyalty and stand out in a complex and competitive landscape. 61% of consumers say a positive delivery experience incentivises them to shop with an e-tailer again. 75% of consumers expect to be able to see all available delivery options displayed on the product page they're viewing.

Retailers are looking for alternative ways to innovate in order to differentiate and thrive.

In this year's report we explore key themes to help retailers and brands understand what consumers expect.

Firstly, Fast and Flexible Delivery. More than half of respondents (54%), identified fast delivery as their top or second most important priority. Getting it right for today's time-pressed consumers means delivering their online orders rapidly and to their specific requirements in immaculate condition. All the while keeping them fully informed about exactly when delivery will happen.

Secondly, International Shopping. Consumers expect full transparency on delivery and associated costs when buying abroad. In fact, 73% of international shoppers check to see what additional charges will be applied to product and shipping prices- up from 67% in 2017.

Thirdly, Consumer Loyalty. This includes customer loyalty programmes and a full range of delivery options that suits various consumer lifestyles. 49% of respondents would prioritise shopping with one online provider over another if it offered a loyalty programme featuring free next day delivery.

Finally, we discuss Going Luxe and Going Green. Consumers are increasingly mindful of the environmental costs of delivery and opting for a consolidated delivery service. 79% of consumers are conscious of, or care deeply about the environment when thinking about how they receive their deliveries.

Our findings show how online shoppers around the world appear to be confidently and enthusiastically embracing opportunities to purchase luxury brands online.

With a wealth of choice at their fingertips, should eCommerce providers fail to get the end-to-end e-delivery experience right, these well-practiced digital shoppers will make e-tailers fight even harder for their loyalty.



ECOMMERCE DELIVERY TRENDS: CONSUMER PREFERENCES



say a positive delivery experience incentivises them to shop with an e-tailer again



of consumers expect free delivery for everyday purchases.



take advantage of a minimum spend 'free delivery' option



no longer expect to pay for standard delivery



expect delivery options displayed on the product page



chose one online provider over another because they provided more delivery options



want a one-hour delivery in metropolitan areas



say clear, accurate tracking is an important consideration for the majority of their purchases



are conscious of, or care deeply about the environment when thinking about how they receive their deliveries



would prioritise an online provider if it offered a loyalty programme featuring free next day delivery

Consumers have a range of different desires when it comes to delivery options. These are the most popular delivery options on a global basis:



HOME DELIVERY



COLLECT IN STORE



PICK-UP DROP-OFF (PUDO)



WEEKEND DELIVERY



DELIVERY TO PLACE OF WORK

KEY FINDINGS



Consumer loyalty is increasingly hard to come by but worth it. 61% of consumers will shop again with an e-tailer if they have a positive delivery experience. Our research highlights how consumer priorities are shifting when it comes to the delivery of eCommerce orders.

MOST CONSUMERS NOW EXPECT FREE DELIVERY FOR THEIR EVERYDAY PURCHASES – 62% said free delivery is their top consideration for the majority of purchases they make, up from 47% in 2017. 62% of consumers expect free delivery for everyday purchases. 75% take advantage of a minimum spend 'free delivery' option.



say they no longer expect to pay for standard delivery.

MANY CONSUMERS ARE PREPARED TO PAY FOR FASTER DELIVERY OR A MORE CONVENIENT DELIVERY OPTION – 70% of the online shoppers we surveyed said they expect to pay extra for a one-hour, same day, next day or Sunday delivery.



want eCommerce providers to offer a one-hour delivery in metropolitan areas.

CONSUMERS WANT TO SEE DELIVERY OPTIONS – 75% expect delivery options to be displayed on the product page. 58% chose one online provider over another because they provided more delivery options.

WHEN SHIPPING IS FREE, CUSTOMERS STILL EXPECT RELATIVELY FAST DELIVERY – those consumers who'd had a negative delivery experience in the last 12 months identified slow delivery as an issue on the purchases they'd made from the eCommerce sites of retailers (34%), brands or manufacturers (34%), and other online marketplaces like eBay and Etsy (36%). Even Amazon struggled to match consumer expectations, with 36% of respondents expressing dissatisfaction with the time it took to receive their goods.

THE ABILITY TO SELECT WHICH CARRIER DELIVERS THEIR ONLINE PURCHASES IS BECOMING A TOP PRIORITY FOR MANY CONSUMERS – 54% now say that it is somewhat or very important they're able to choose which online carrier delivers their online purchases – up from 42% last year. Indeed, a significant number of consumers admit to abandoning online shopping baskets because an eCommerce provider indicated delivery would be via a carrier they say has always let them down.

CONVENIENCE-ORIENTED CONSUMERS ARE TEMPTED TO TRY OUT NEW DELIVERY OPTIONS – 44% plan to take advantage of collection from a pick-up drop-off point (PUDO), so they can avoid having to deviate from their daily routines or miss delivery slots. Similarly, delivery to a secure box outside their home held a strong appeal for 28% of respondents, with a further 24% saying they're ready and willing to try out futuristic options like delivery by drone, robots or autonomous vehicles.

THE MOST POPULAR DELIVERY OPTION ON A GLOBAL BASIS IS HOME DELIVERY – in 2017, 82% of consumers opted for home delivery. Online shoppers took advantage of many options, the most popular being collect in store (44%), collection from a pick-up drop-off point (39%) and delivery to workplace (19%).

The results for 2018 are as follows:



SHIFTING LIFE PRIORITIES MEAN MORE CONSUMERS WANT THE FREEDOM TO CHANGE DELIVERY DATES OR RE-ROUTE THEIR ORDER POST-DESPATCH

– while **30%** of shoppers had made changes to their delivery preferences ‘on the fly’ after their order had been dispatched, a further **48%** say that if this option had been available to them, they’d have used it.



say clear, accurate tracking is an important consideration for the majority of their purchases.

THE RISE OF THE LUXURY BRAND BUYING CONSUMER – compared to **41%** in

2017, a staggering **78%** of respondents had purchased online goods from a luxury brand in the last 12 months, with **49%** shopping with up to three different brands. Since **58%** of respondents say their attitude to delivery changes according to the value of the items they purchase, understanding the ‘store to door’ delivery priorities of this growing army of luxe shoppers is a top concern.

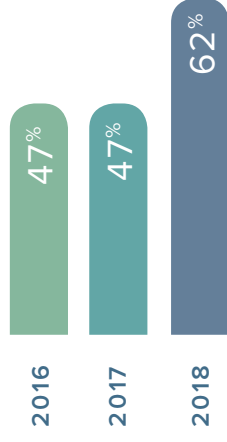
CONSUMER DEMAND FOR A CONVENIENT 'GREEN' ECO-FRIENDLY DELIVERY IS GROWING – last year **47%** of shoppers told us they were conscious of the environmental impact of their online deliveries. This year, that number had climbed to **51%**, with a further **53%** going on to say that if available, they would always choose a consolidated delivery over multiple individual deliveries from eCommerce sites because it was either more convenient for them, and/or greener.



of consumers are conscious of, or care deeply about the environment when thinking about how they receive their deliveries.

FREE DELIVERY IS NOW EXPECTED FOR EVERYDAY PURCHASES

– This is the percentage of respondents who said free delivery is their top consideration for the majority of purchases they make. **49%** would prioritise an online provider if it offered a loyalty programme featuring free next day delivery.



CARRIER SELECTION MATTERS – The ability to select which carriers delivers their online purchases is becoming a top priority for many consumers.



INTERNATIONAL SHOPPERS AWAIT THE OUTCOME OF BREXIT NEGOTIATIONS WITH BATED BREATH

– last year **58%** of cross-border shoppers said it would be 'shopping as usual' from the UK once it exits the European Union. But fast forward to 2018 and **33%** of this year's international shoppers now say they are less confident about making purchases from UK eCommerce sites, citing concerns around possible higher delivery prices, the application of additional duties or taxes and returns becoming more complex.

OVERALL, E-TAILERS APPEAR TO BE PERFORMING WELL AGAINST CONSUMER DELIVERY EXPECTATIONS

– this year **87%** said their delivery experience of brands/manufacturers had been good/excellent; and **82%** confirmed their delivery experience with other online marketplaces was good/excellent. By comparison, **92%** of consumers ranked their Amazon e-delivery experience as being good/excellent.

FAST AND FLEXIBLE DELIVERY



When it comes to shopping with eCommerce sites, more than half of respondents (54%), identified fast delivery as their top or second most important priority:

- Encountering slow delivery resulted in consumers abandoning shopping baskets on the websites of retailers (39%), online marketplaces like eBay and Etsy (39%), and brands/manufacturers (36%).
- Even Amazon disappointed 37% of respondents who said a slow delivery resulted in a less than satisfactory shopping experience with the online platform.

eBay

39%

Etsy

39%

amazon.com

37%

SPEED IS NOW CENTRAL TO THE CUSTOMER EXPERIENCE

Receiving online purchases as fast as possible is important for consumers; around one-fifth (21%) had taken advantage of a same-day delivery option where this option was available to them.

Indeed, this year's report shows how consumer hunger for super-fast delivery options appears to be on the up, with 55% of respondents saying they'd like retailers to offer a one-hour delivery service in metropolitan areas. In certain geographies, shoppers are more than eager to make use of a one-hour delivery option:



77%

SPANISH



66%

US



64%

FRENCH

These were the top respondents for one-hour delivery.



69%

27-38

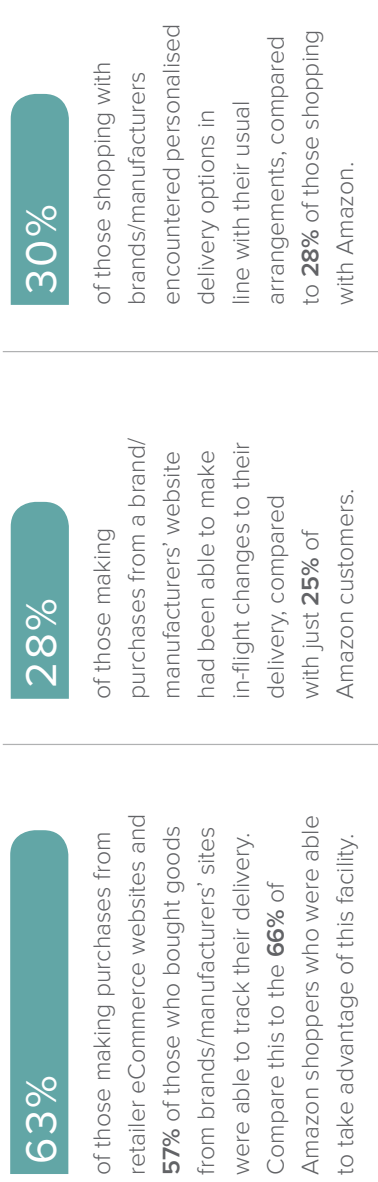


67%

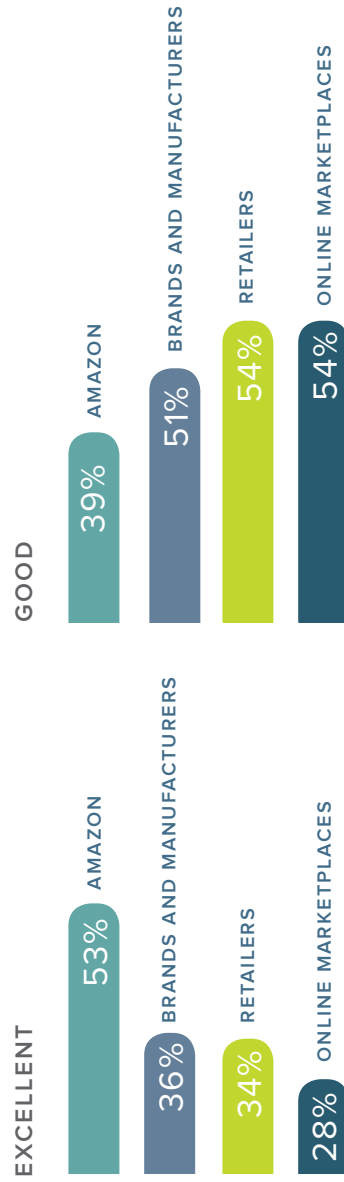
MILLENNIAL

These were the demographics that most desired ultra-fast one-hour delivery service in metropolitan locations.

Retailers like Amazon and Alibaba set the delivery benchmark against which consumers evaluate the performance of other eCommerce sites. An impressive **79%** of respondents had purchased goods online for delivery from Amazon in the last six months, but our survey shows that retailers, brands and other online marketplaces are responding well to the challenge of providing an 'Amazon-like' delivery experience – and in some instances are outperforming the eCommerce giant at its own game:



This year's shoppers ranked their last delivery experience with an eCommerce site as:



79%
**OF RESPONDENTS
HAD PURCHASED
GOODS ONLINE FROM
AMAZON IN THE LAST
6 MONTHS**

So, what are the core elements that customers expect as a minimum to underpin their delivery experience?

CONSUMERS WANT DELIVERY TO BE FREE, FAST AND ACCURATE

Up from **59%** in 2017, almost two-thirds (**62%**) of consumers said that free delivery has become their most important consideration when making the majority of their purchases – and just because it's free doesn't mean they're prepared to compromise on shipping times.

55%

of Canadian shoppers abandoned baskets with online retailers because free delivery was not available.

82%

of US shoppers had purchased more items or products to take advantage of a free delivery option.

47%

of Spanish shoppers abandoned online marketplace shopping baskets because delivery would take too long.

80%

of UK shoppers say free delivery would incentivise them to buy more online during peak sales periods like holidays, Black Friday and Cyber Monday.



Delivery was later than promised.



Online purchases were not delivered in line with the shopper's requested time slot.



The delivery didn't arrive at all.



The package was damaged.

Asked to evaluate the top causes of frustration for delivery experiences that were not satisfactory, consumers cited their top issues as:

CONSUMERS WANT MORE DELIVERY CHOICE – ONE SIZE DOES NOT FIT ALL

Consumers expect to encounter a range of delivery options when shopping online that match their lifestyle, so they can select the time, place and delivery mode that best meets their immediate needs.

58% OF ALL CONSUMERS

say they'd prioritised purchasing goods from one eCommerce site over another because it provided more delivery options.

71%

OF FRENCH CONSUMERS

70%

OF US CONSUMERS

60%

OF SPANISH CONSUMERS

were the most likely to be tempted to switch eCommerce provider if the choice of delivery options on offer were better suited to their needs.

eCommerce sites also need to recognise that geographic preferences for last-mile delivery vary and should plan their local delivery strategies accordingly.

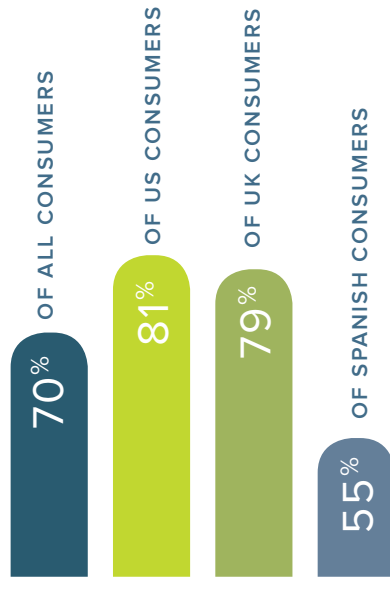
- Over **80%** of shoppers in all countries we surveyed have utilised a home delivery service option – so the pressure is on eCommerce sites to ensure shoppers aren't kept in the dark about when deliveries will arrive and keep their delivery promises – or risk disgruntled customers taking their future business elsewhere.
- Collect in-store is a particularly popular choice for consumers in the UK (**62%**), US (**56%**), Spain (**55%**) and France (**55%**).
- Delivery to a pick-up drop-off point (PUDO) holds a strong appeal for European shoppers, especially those in France (**58%**), Spain (**50%**) and the Netherlands (**46%**).
- One-fifth or more of shoppers in Canada (**21%**), Germany (**21%**) and the US (**20%**) have arranged for online purchases to be delivered to their place of work – with **26%** of UK and French shoppers saying they regularly take advantage of this option.
- Delivery to a locker is a popular option with **31%** of German shoppers.
- Over a quarter of UK (**28%**), Dutch (**27%**) and US (**27%**) shoppers elected for a weekend delivery.

CONVENIENCE-ORIENTED CONSUMERS ARE READY AND WILLING TO PAY FOR FASTER OR MORE SUITABLE DELIVERY

The majority of consumers (**70%**) we surveyed said they still expect to pay extra for one-hour delivery, same day delivery, next day delivery or a Sunday delivery slot. But some shoppers are more willing than others:

- US (**81%**) and UK (**79%**) consumers were more than prepared to pay for speedy and convenient shipping options.
- Spanish shoppers were the least enamoured at the idea of paying more for speed or convenience, with just **55%** saying they'd expect to pay extra for these options.

With so many of today's online shoppers perceiving speedy shipping as a 'must have' benefit, displaying fast-delivery options on product pages will resonate well with those consumers looking to personalise delivery according to their needs.



CONSUMERS WANT DELIVERY ON THEIR TERMS – AND HYPER-PERSONALISED

A growing number of consumers now expect a truly customer-centric delivery experience that's flexible enough to accommodate their fast-changing needs:



say they'd requested a change of delivery date or location after their order had been dispatched.



said that if this option had been available to them, they'd have used it – with **60%** of French shoppers and **55%** of Spanish shoppers most likely to jump at the opportunity of changing delivery requirements 'on the fly'.



of millennials and **48%** of shoppers aged 27-38 had rescheduled aspects of their delivery. Unsurprisingly, they are also the two groups most likely to take advantage of this option in the future with **57%** of those aged 18-26 and **63%** of those aged 27-38 saying that if they encounter this option, they'll use it.



of all respondents say they expect eCommerce providers to know who they are and schedule delivery in line with where they are right now – and not to a fixed postcode. Once again, millennials (**31%**) and those aged 27-38 (**31%**) have high personalised ambitions, as do shoppers in Spain (**31%**) and the US (**31%**).

INTERNATIONAL SHOPPING





CONSUMERS WILL SHOP INTERNATIONALLY

Cross-border eCommerce is making it easier for consumers around the world to buy goods from other countries. Indeed, the rate at which consumers are going global in pursuit of product deals or items not available in-country is impressive. In the last 12 months:

For eCommerce providers looking to make headway with the growing appetite of global consumers for buying across borders, competing with international platforms like Amazon means they will need to up their game to ensure they deliver a superior cross-border delivery experience that exceeds customer expectations.

Asked about the pain points that deter them from making international purchases, respondents said the top barriers they'd encountered were:



of this year's respondents had made between 1 and 5 purchases overseas



had made between 6 and 10 international shopping forays



said they had made 10 or more international purchases



Expensive delivery



Slow delivery



Having to pay for delivery

CROSS-BORDER SHOPPERS EXPECT FULL TRANSPARENCY AND ASSOCIATED COSTS

Providing quality delivery services that feature direct shipping to the customer and utilizing a mix of regional and local carriers to get goods to customers in the fastest possible manner eliminates the risk of delivery becoming convoluted, irritating or expensive for international shoppers.

Similarly, giving customers the broadest possible choice of last-mile delivery options that match their needs all adds up to a recipe for success.

But eCommerce sites can't afford to overlook the basics, especially when it comes to ensuring that online shoppers don't encounter unexpected charges on the purchases they're considering.

CONSUMERS CHECK TO SEE WHAT ADDITIONAL CHARGES WILL BE APPLIED



73% of international shoppers check to see what additional charges will be applied to product and shipping prices – up from 67% in 2017.

check to see what additional charges will be applied to product and shipping prices.

CONSUMERS WILL ABANDON BASKETS IF THERE ARE UNEXPECTED CHARGES AND TAXES



33% of respondents would cancel their order if additional taxes were applied to goods purchased or shipped from another country.

were most likely to abandon an online shopping basket if they were presented with an unexpected additional charge for taxes at checkout.

INTERNATIONAL SHOPPERS' HABITS MAY REALIGN AFTER BREXIT

Last year, **58%** of cross-border shoppers confirmed that it would be 'shopping as usual' as far as they were concerned once the UK exits the European Union. But fast forward to 2018 and international shoppers seem confused about their future UK shopping behaviours:

34% said their decision to buy goods online from UK ecommerce sites would remain unchanged post Brexit, while **34%** said they would be less likely to make purchases from UK sites.

33% are currently sitting on the fence, saying they don't know if they'd be more or less likely to make UK purchases.

It would appear that this significant 'undecided' cohort of cross-border shoppers are awaiting the outcome of Brexit negotiations to understand exactly what this will mean for them in terms of the cost and complexity of UK purchases.

Asked to evaluate what would determine their decision not to buy from the UK, respondents cited they would be put off from making purchases if:



goods become more expensive than locally



delivery costs increase



additional taxes are applied to online purchases and deliveries



returns become more difficult

OF CROSS-BORDER SHOPPERS CONFIRMED THAT IT WOULD BE 'SHOPPING AS USUAL' POST BREXIT

58%

Last year, **27%** of US shoppers said that post Brexit, they'd be buying even more goods from the UK. This year, **36%** said they'd carry on shopping within the UK. And their eagerness to carry on buying goods from the UK was more than matched by enthusiastic Canadian shoppers (**39%**).

CONSUMER LOYALTY



Standing out from the crowd is one of the biggest challenges facing eCommerce sites. So, what does it take to deliver a stand out customer experience that goes beyond fast shipping and satisfies the desire for ever-more convenient delivery options?

LOYALTY PROGRAMMES HOLD A STRONG CONSUMER APPEAL

Amazon's Prime membership programme has proved a powerful engine for sales growth, setting the bar in consumer minds around what a great subscription service should deliver. In fact, **74%** of consumers would like the eCommerce websites they use regularly to provide a delivery loyalty programme. Unsurprisingly, consumers have high expectations when it comes to delivery loyalty programmes. But once subscribed, the frequency with which they place orders is likely to ramp up significantly.

There is a significant opportunity for retailers and brands to collaborate to provide delivery loyalty programmes that would match high consumer expectations:

49%

of consumers say they would prioritise one online eCommerce provider over another because of its loyalty programme; US (**65%**) and Spanish (**58%**) shoppers are most enticed at the prospect of exchanging their shopping loyalties in return for referential member services.

25%

of shoppers say they're planning to join a delivery loyalty programme in the coming 12 months.

19%

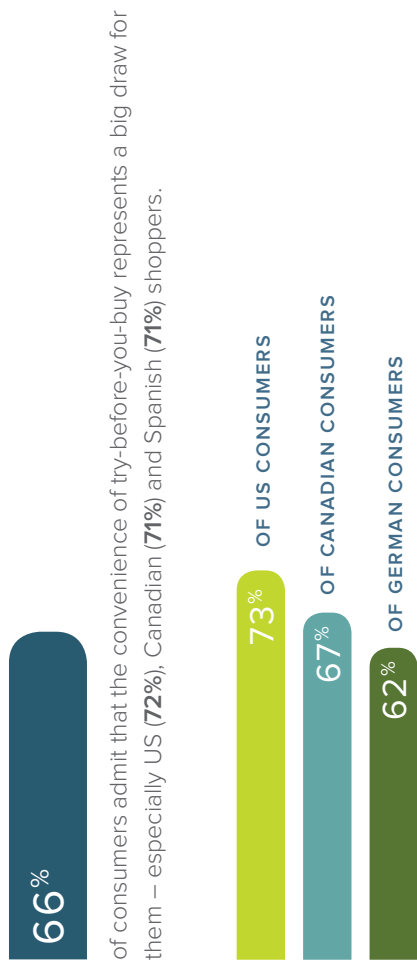
of consumers say they're more than prepared to pay a monthly fee if that means securing unlimited next-day delivery on all their online orders.

65%

of consumers would be interested in a delivery loyalty programme where multiple retailers and brands work together to offer a premium delivery service. This is particularly high in Spain (**73%**) and US (**74%**).

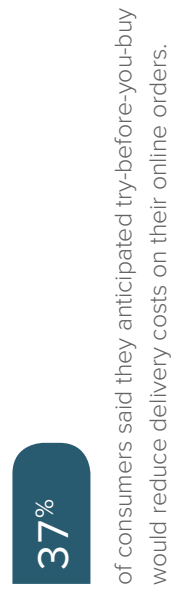
TRY-BEFORE-YOU-BUY MAKES FOR A MORE CONVENIENT SHOPPING EXPERIENCE

eCommerce sites that are struggling to streamline their returns process will need to prepare for the tsunami of demand that will be generated as more consumers look to take advantage of the try-before-you-buy trend. Indeed, **58%** of shoppers say they would be extremely likely or likely to try out eCommerce sites that offered this service:



of consumers admit that the convenience of try-before-you-buy represents a big draw for them – especially US (**72%**), Canadian (**71%**) and Spanish (**71%**) shoppers.

say for them, it's all about flexible customer service.



of consumers said they anticipated try-before-you-buy would reduce delivery costs on their online orders.

The bad news for eCommerce sites is that **54%** of respondents would not pay more to take advantage of this option. That said, US consumers are bucking the trend on this point, saying they'd pay for the ease and convenience endowed by try-before-you-buy services.



GIVING CONSUMERS CONTROL OF WHO DELIVERS THEIR PARCEL

Having the ability to choose the carrier that's entrusted with delivery of their online orders is becoming a top priority for shoppers.



say the freedom to choose a last-mile carrier is very or somewhat important to them. This was particularly the case for **31%** of US shoppers who view not having this facility as a deal-breaker when determining which eCommerce provider gets their business.



Consumers abandoned shopping baskets at this type of site after being allocated a carrier that has always let them down.



say the eCommerce site they usually shop with does not offer the carrier service they like to use.



RETURNS – BRIDGING THE EXPECTATION GAP



of consumers saying they often or sometimes purchase multiple products online knowing they will return some or all of them, those eCommerce providers able to offer a streamlined, transparent and hassle-free returns service will bolster their brand reputations.



of shoppers we surveyed said an eCommerce site's returns policy had deterred them from shopping with them. Spanish (**66%**) and Dutch (**59%**) consumers were the most likely to abandon a shopping cart due to an unacceptable returns policy.



reported finding it difficult to find information about returns on an eCommerce website.



Over one-third (**35%**) of consumers say they frequently check an eCommerce site's returns policy before making a purchase. A further **38%** sometimes check before they click 'add to basket'.

Consumers in Spain (**41%**) and Canada (**40%**) and the US (**40%**) are the most diligent when it comes to checking an eCommerce site's returns policy before deciding whether to buy or not.

Consumers in the US (**45%**) and Canada (**30%**) were the most likely to express high satisfaction with the returns process provided by eCommerce websites. By comparison, European consumers were much less impressed; high satisfaction scores ranged from **21%** (Dutch shoppers) to **25%** (French shoppers).

RETURNS – GETTING THE EXPERIENCE RIGHT

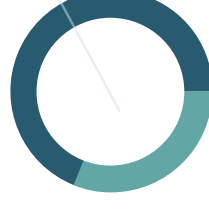
With returns proving a stumbling block for many consumers, getting the returns experience right represents a golden opportunity for eCommerce providers:



of shoppers said they would be very likely to shop more on eCommerce sites that made the returns process easier; an impressive **49%** of US shoppers and **46%** of Spanish shoppers said this would prove a top incentive for them.



of US shoppers said they would be willing to pay more for a more convenient or premium returns option.



FRENCH LOCAL PICK-UP

French shoppers seem split between dropping goods off at a retailer's store and using a pick-up drop-off point (PUDO).



FRENCH RETAILER STORE

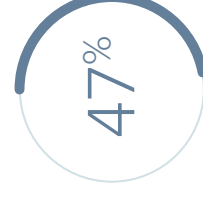


GERMAN

German shoppers and UK and US shoppers say posting their returns is their preferred method for sending goods back.



UK AND US



SPANISH



UK

Courier pick-up of returns held the most appeal for Spanish and UK respondents.

GOING LUXE AND GOING GREEN



THE LUXURY SHOPPER COMES OF AGE

Following a tentative start, luxury brands are now racing to embrace digital commerce — whether that's partnering with multi-brand retail sites or developing their own online sales portals - or both.

Previously, luxury has been slow to move online, with many brands reluctant to embrace eCommerce for fear of reducing their exclusivity or commoditising their offerings.

But luxury brands are now grasping the online opportunity — taking inspiration from other retailers and more mass-oriented brands to satisfy the aspirations of a growing number of digital consumers eager to buy luxury goods online.

With luxury eCommerce taking off, the pressure is on smart retailers to provide unique experiences and differentiated delivery options that appeal to shoppers. Whether that's a two-hour delivery window, or a same-day 'white glove' concierge delivery service that enables customers to try on or view products in the comfort of their home, office or hotel suite — and immediately return unwanted items.

An impressive **78%** of consumers say they'd purchased online goods from a luxury brand in the last 12 months, with **49%** saying they'd shopped with up to three different brands. Home delivery proved the top preference for the majority (**43%**) of those making luxury item purchases.

- US shoppers were the most likely to head online to engage with luxury brands — with **91%** making online purchases in the past year.
- Similarly, Spanish (**89%**), French (88%) and German (**86%**) shoppers were enthusiastic online purchasers of luxury brand items.
- Dutch shoppers were the least likely to make an online purchase from a luxury brand (**40%**).

Asked to evaluate how the delivery of their luxury item compared to their ordinary online deliveries, **46%** said it felt more secure; **43%** said there was a greater level of personal care; and **42%** said the delivery was more controllable and trackable.

However, **22%** of shoppers said there was no discernible difference from their other everyday purchases. This is concerning- luxury by definition should be better. Luxury brands will need to ensure their delivery is of premium quality in order to match the expectations of luxe consumers.

Indeed, with **58%** of respondents saying their attitude to delivery changes according to the value of the items they purchase, it is unsurprising that concerns about the cost of delivery falls way down the list of shopper priorities when buying luxury goods:

57%

of consumers said speed of delivery was important.

55%

of consumers scored delivery reliability highly.

51%

of consumers said delivery insurance was a top concern.



SAVING THE PLANET – ECO DELIVERY RISES UP THE CONSUMER AGENDA

The evolving purchasing preferences of online shoppers continue to re-shape the last-mile delivery landscape and today's consumers are increasingly concerned about the eco-impact of their online purchasing behaviours:



of consumers care about a great deal how their online deliveries are contributing to increased carbon emissions and traffic congestion, with US consumers (**41%**) in particular saying this is causing them some soul searching.



of consumers now say they're conscious of the issue – up from **47%** in 2017. That's especially the case for consumers in France (**62%**), the Netherlands (**60%**) and Germany (**56%**).

With awareness of 'green issues' rising up the consumer agenda, giving consumers an eco-friendly delivery option like consolidated delivery will become an increasingly important point of differentiation for retailers and brands looking to establish and maintain strong consumer-centric relationships.

THE CONVENIENCE OF CONSOLIDATED DELIVERY SERVICES PROVES TEMPTING FOR ONLINE SHOPPERS

Consolidated delivery services offer consumers an attractive opportunity to achieve a 'triple win' – giving them greater convenience, a single delivery cost saving, and the chance to reduce the environmental impact of their online shopping habits.

Indeed, when asked to evaluate the benefits of receiving all their orders in one consolidated delivery, the respondents confirm greater convenience tops the bill for most shoppers:



said that the convenience of receiving all their goods in one go was an attractive proposition; **76%** of shoppers in Spain highlighted this as the top benefit they'd gain.



said that wherever a consolidated service was available, they'd always chose this option in preference to having to plan to receive multiple deliveries; **61%** of German shoppers were particularly adamant on this point.



said they viewed the reduced environmental impact as being an important additional outcome of opting for a consolidated delivery; that's especially the case for Dutch (**42%**) and German (**41%**) shoppers.

While motivated first and foremost by a desire to simplify and streamline how they receive their purchases, the research highlights how consumer enthusiasm for eco-innovations like consolidated delivery services is increasingly powered by a growing desire to pursue more sustainable shopping behaviours.

REVIEW AND FINAL OBSERVATIONS



Consumers view delivery as a pivotal moment in their online shopping experience – it's the reason why the last mile is increasingly focused on enabling an exemplary consumer delivery experience that builds brand reputation and loyalty.

As eCommerce markets mature, so do consumer expectations around what a great e-delivery experience looks like. But, as this year's research shows, eCommerce providers are largely rising to the challenge: **88%** of respondents said that, all things considered, they were positive about the delivery performance of the eCommerce sites they'd shopped with in the last 12 months.

However, for customers the definition of what constitutes a fast delivery keeps getting shorter – even when delivery is free. And while certain categories of customers are willing to pay for faster service or greater delivery precision, others are resolute that they'll only shop with eCommerce sites where standard delivery is provided for free.

Retailers and brands will need to master new capabilities and innovate to keep up with fast evolving customer expectations. As the battle to win online customer loyalty intensifies around the world, the pressure is on to offer a rich 'package' of local delivery options and specialist carrier services that cater to the growing cohorts of international, luxe and eco-conscious shoppers.

- Consumers increasingly expect to be able to control their own delivery service, utilising the options that best suit their delivery needs for each individual order. Indeed, consumers increasingly expect eCommerce sites to give them options for almost anything they can imagine doing and ensure delivery puts a customer's convenience first.
- Consolidated delivery services represent a double win for consumers – they benefit from the convenience of one scheduled delivery, plus **93%** of those who said they'd opt for a consolidated delivery out of concern for the environment said they believed this would have a positive impact on improving air pollution and traffic congestion.
- Retailers and brands need to know everything about consumers and their fast-changing delivery priorities, enabling shoppers to engage on their own terms and take control of deciding 'what, when, how and who' makes their delivery.
- Being able to offer consumers the ability to make 'in-flight' changes is becoming the new norm for delivery and returns, ensuring customer satisfaction is high.
- Frictionless returns are important to consumers – and the desire to experience try-before-you-buy services is on the rise. Retailers and brands will need to prepare for increased volumes of returns, and initiate strategies to facilitate a smooth and efficient returns service.



DELIVERY EXCELLENCE EVENTS

MetaPack regularly hosts Delivery Excellence workshops. If you are interested in finding out more, simply contact us via events@metapack.com.

THE DELIVERY CONFERENCE GLOBAL, 26th February 2019

MetaPack host the largest gathering of eCommerce Delivery experts at the Delivery Conference, held in London. Visit thedeliveryconference.com for event details. Tickets for retailers and brands to attend The Delivery Conference are free.

CONSUMER RESEARCH: ECOMMERCE DELIVERY DATA SETS

MetaPack has been producing the State of eCommerce Delivery Consumer Research Report for five years. Need to see or understand the data behind the statistics? Perhaps you want to understand the global trends behind the facts? Feel free to contact us via info@Metapack.com for further information and insight.

REQUEST A DEMO

MetaPack works with the world's leading retailers and brands to optimise eCommerce delivery. A single integration to MetaPack's SaaS solution opens up a catalogue of 470 carriers and 5,000 delivery options. Want to know more? Request a demo metapack.com/request-a-demo/.

QUESTIONS?

Call us and speak with an eCommerce Delivery Management expert to answer any questions you may have:

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ABOUT METAPACK

MetaPack is the leading provider of eCommerce delivery management technology to global retailers and brands. Founded in 1999, MetaPack helps e-commerce and delivery professionals to meet with the consumer's growing expectations of delivery, whilst maintaining and optimising operational efficiency. MetaPack's SaaS solution offers a wide range of personalised delivery services, from global order tracking to simplified return procedures, through the largest library of 470 carriers and 5,000 services that span every country in the world. Thanks to MetaPack, more than 550 million packages are sent annually by many of the world's leading e-commerce retailers. MetaPack is a wholly-owned subsidiary of Stamps.com (Nasdaq: STMP).

More information: metapack.com

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