



# DIMENSION REPORT

Operations & Logistics: November 2017

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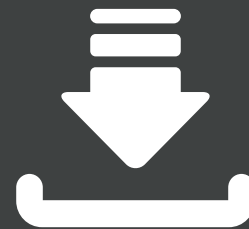


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# From the editor-in-chief

AS THIS INTERNETRETAILING Operations & Logistics Performance Dimension Report is published, retailers are making final preparations for the annual stress test that is Black Friday. Late November – and the Black Friday period of frantic discounting has now extended to last for well over a week – has over recent years become the time of year that puts all fulfilment operations through their paces. It's important traders get it right because for many, this is the make or break season. Indeed, many have been planning since January on ensuring that they get it right.

In previous years, it's proved to be at this time of year that we see the biggest changes in the way that shoppers buy – and how they want to take delivery of their purchases. When customers transact at scale, their changing behaviour becomes more stark. In years gone by, we've seen the shift towards using click and collect that emerged as a clear trend in post-Christmas trading updates from retailers, including the grocers. We've also seen the rise in demand for fast, next-day delivery and other premium services that come into their own over the busy Christmas ordering period.

These are all trends and changes that we reflect in this report, as we analyse the delivery, collection and returns promises that retailers are making to their customers. Across the pages of this report, we'll see how leaders in this Dimension are deploying logistics services to give shoppers the convenient and joined-up services that they demand. We also see how day-to-day experience of shoppers buying from the Top500 retailers is still some way behind that reality. We're aiming to tell the story of how retailers are approaching the task of giving their customers the experience that they want, from placing the order, to taking delivery and beyond.

Our research is aided by the generous input of our InternetRetailing Knowledge Partners, as well as by feedback from our readers. We're always keen to hear what you think about both this report and the wider series of IRUK Top500 reports as we start to look ahead to 2018. Whether that's on the metrics that we use to evaluate each area, from Operations & Logistics to Strategy & Innovation, Merchandising, Brand Engagement, Mobile & Cross-channel and The Customer, or broader responses to this and the IREU Top500 series. We look forward to hearing your thoughts.

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You can also find information about the IREU Top500, our new index of top European retailers, via the InternetRetailing website.

# Editors' comment

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Delivery, returns and collection. These may not seem the most glamorous or compelling part of online and multichannel retail, but make no mistake, they're now key to the customer experience. How much delivery is going to cost, and how straightforward a return might be are deciding, if not primary, factors in whether a customer will choose to buy in the first place. The parcel's punctuality and style of delivery then becomes key to the aftersales experience, and will underpin decisions on whether a customer will return as a loyal advocate, or choose to go elsewhere in the future.

For as Karen Gibson of Asda's ToYou service says in our extended case study (page 20), there are emotions at work throughout this part of the customer experience, and meeting expectations in this area is all part of a delivering a service that works. These are also ideas we explore in our strategic overview (page 8)

Over the pages of this Dimension Report we also set out to look at what the UK's Top500 retailers offer, from the cutting-edge to the average, in research that sets out to understand exactly what retailers are doing to meet the demands of their shoppers, and, by implication, what customers now expect of the traders they buy from.

We take a hands-on approach to this area of the retail business, finding out what leading retailers are doing to give their customers the best delivery experience, from our series of case studies (page 18) and in-depth analysis through to 12 approaches adopted by traders from across the UK (page 24).

We consider the research that underpins this Dimension Report in depth through two features. Analysing the numbers measures the delivery and collection promises given by Top500 retailers (page 12), while a second research feature focuses on returns (page 32). We're also looking to the future in our emerging practice feature as we consider the implications of Brexit for logistics operations through the expert reflections of Duncan Buchanan, policy director of the Road Haulage Association.

As ever, we'd like to thank all the Knowledge Partners who have contributed their expertise and insights in both this and previous Dimension Reports. We welcome your thoughts on new areas of research as we add to our primary data and analysis. Please email: [jonathan@internetretailing.net](mailto:jonathan@internetretailing.net) and [chloe@internetretailing.net](mailto:chloe@internetretailing.net).

**Jonathan Wright and Chloe Rigby, Editors**

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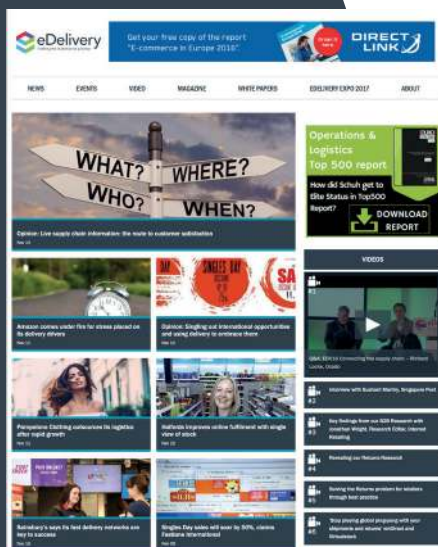
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# Fulfilling the customer experience

**Stephanie Raven**, content marketing strategist at PFS, puts forward three steps to customer satisfaction in last-mile delivery



PFS

MARKET LEADERS SUCH as Amazon have created a 'get it here today' expectation that can be hard to meet for the many retailers that don't currently have the budget or the right infrastructure to do so. But shoppers are savvy. They are well aware of new services such as same-day delivery, click and collect, free returns or delivery apps that allow real-time changes. And that knowledge will only increase as technology develops. So what are the key actions that retailers can take now to give today's and tomorrow's customers that level of convenience they expect?

## #1: Consider all options

Customers want to have flexibility and control over how and when their parcel will be delivered. Metapack research in 2016 found that 45% of all consumers had abandoned an ecommerce basket because of unsatisfactory delivery options. Adopting an omnichannel strategy gives customers the convenience they expect from 'good' retailers. Omnichannel services, including ship from store and click and collect, can help increase online sales by offering cheaper and more convenient delivery options for shoppers, and help mitigate the last-mile delivery challenges that all retailers and carriers face during peak season.

## #2: Plan for peak

The Black Friday period marks the beginning of the Christmas shopping frenzy, with predictions for 2017 already suggesting that UK shoppers will spend £20bn online in November and December. Retailers must be prepared as early as possible to make adjustments or corrections ahead of this surge in orders. Look to last year's figures to predict traffic and understand where bottlenecks might arise. But since customers never act exactly as expected, also build in a certain amount of flexibility. Retailers need to step back and look at their ecommerce systems and their architecture, and their carrier mix, as well as staffing needs, then plan accordingly. Building the capacity for peak can only happen if it involves the whole business, with technology, people and processes working in harmony for a frictionless delivery experience.

## #3: Up close and personal

Open and honest communication helps build a relationship with customers who expect to be kept informed from order to delivery and, if required, into the return and refund process. A recent eDelivery.net survey, in conjunction with Netdespatch, found 51% of retailers cited consumers' ability to track their order as a high priority for improvement. Providing update notifications along the journey was the highest priority for 27% of retailers and a medium priority for 41%. Close interaction with customers is crucial throughout the whole journey and this extends to product packaging, which is another powerful communication tool for a business. Packaging is not just about safe transport, it's the brand's voice. It can have a lasting impact on the consumer, so retailers shouldn't overlook an investment in this area.

Delivery is much more than just sending parcels, it's about fulfilling the customer experience. A positive delivery experience means 87% of consumers are more likely to shop again with an online merchant. The stakes are high. As consumers' demands for convenience and more personalised experiences in the final mile grow, retailers need to react quickly and work towards providing a distinctive delivery service that sets them apart from their competition and inspires repeat customers. 🌈

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# Gaining the delivery advantage

Convenience now drives logistics strategies, writes **Chloe Rigby**

IN A WORLD where many retailers sell the same or similar items online, delivery has become a competitive advantage in recent years. Getting the product to the customer fastest, or in the most convenient way, can often make the crucial difference that wins the sale. Fulfilment might be via home delivery or a range of increasingly sophisticated collection options, but the important thing is that it is convenient and meets the shopper's needs. Walter Blackwood of WMB Consulting was previously head of logistics at Mothercare and chief executive of a number of courier delivery companies. Speaking at InternetRetailing Conference 2017, he said that while standard delivery can be improved on by adding features such as choice of delivery options and order tracking, those aiming towards best-in-class logistics strategies are now working towards an omnichannel experience where "movement from one environment to another is seamless". For most, as yet, he notes, "It's a real aspiration," adding that returns is also becoming a point of differentiation, with shoppers starting to treat online shopping as they would a changing room, ordering extra sizes and colours to be sure an item fits, then sending back the ones that don't.

Retailers working to improve their logistics strategies are doing so at a time when they're dealing with larger volumes than ever before. The latest edition of the IMRG-MetaPack UK Delivery Index offers an insight into the scale of the challenge. It suggests that the number of parcels sent out by retailers in July 2017 was 16.5% higher than the same time last year. The number of parcels grew even faster than sales, with an 11% rise in revenue recorded over the same period. That, said the IMRG, was likely due to higher levels of discounting over the summer.

But while volumes were rising substantially over the summer, the busiest time of the year is



Image credit: Argos

**Argos has worked hard behind the scenes in order to quickly get items to the right location for each customer**

yet to come. The run-up to Christmas provides an annual stress test for retail logistics systems as it's the time of year when delivery really matters at such a scale. For Christmas shoppers aiming to finish their shopping in time, 25 December is an absolutely deadline and the rise of Black Friday over the last three to four years has served to bring that deadline ever earlier. As Terry Murphy, director of John Lewis' National Distribution Centre, told audiences at InternetRetailing Expo this spring, "Black Friday has put an artificial spike in before Christmas that was spikier than anything else."

Reviews site Trustpilot recently released research that suggested timely fulfilment was one of the top priorities for the 8,000 online shoppers who responded to its poll, ranking it ahead of discounting and flexible returns. That only intensifies in the run-up to Christmas. Trustpilot's language analysis of reviews left on the site between October and December 2016 showed that by December, delivery was becoming a more critical factor. "Delivery" was mentioned in 17% of its one-star reviews in October, and



19% of those reviews left in December. Five-star reviews cited “great service”, “excellent service” and “fast delivery” with these terms appearing in nearly 22% of all five-star reviews on the site in December 2016.

Commenting on the findings, Don Ross, president of the Americas at Trustpilot, said, “As traditional and online retailers continue to battle over price, they’re creating a level playing field but there’s a limit to how low you can go. Shoppers are starting to look at other areas to help them decide what and where to buy. Furthermore, sellers who rely heavily on price but fail to meet post-transaction expectations are paying dearly in customer reviews, which have year-round ramifications on paid and organic search, click-through rate and acquisition costs.”

WMB Consulting’s Walter Blackwood told his IRC 2017 audience that getting logistics wrong would “make you go bust very quickly”. He added, “The first and most important thing with cost is to do it only once – get it right first time.” He also noted that good service helps retailers to retain loyal shoppers and that getting a customer in the first place can be expensive. “It’s critical to ensure that if you get a good customer, you keep them. That’s all about service and serving them effectively.” Today, he said, poor service is no longer between the customer and the retailer. “Don’t underestimate the power of social media. When you get it wrong, everybody knows, even those who have never bought from you. Now 100 people can be disappointed on social media about one poor delivery.”

### Cutting-edge logistics

At the forefront of the industry, retailers are delivering highly convenient services that are

“Incumbent organisations are not nearly as agile as startups that are entering this market, and retailers tend to be more agile as well”

Brody Buhler, Accenture

improving all the time. Amazon has long set the pace for delivery through the range of options offered by its subscription scheme, Amazon Prime. Prime members living in major UK cities can now routinely get their goods delivered on the day they order them, and sometimes in as little as one hour. Its Amazon Fresh service, delivering groceries in London and the South East in as little as an hour, appears to have driven change across the industry.

Leading UK supermarket Tesco this summer claimed a national first when it introduced a same-day grocery delivery service, adding to a same-day click-and-collect service in 300 stores. The service, which delivers shopping by 7pm that was ordered by 1pm, at a cost of between £3 and £8, represented an extension to a service that previously operated in London and the South East from 2014 onwards, and had seen an 18% growth in demand during the year.

Argos has developed a hub-and-spoke approach to logistics that enables customers to order up to 10,000 products for fast delivery to its network for digital format stores, located in locations from London Tube stations to branches of supermarket Sainsbury’s, its parent company, across the UK.

Speed of delivery is proving particularly important in fashion, where retailers now promise next-day delivery and collection from



the store for orders that are placed ever later. At Next, for example, the cut-off time for both is at midnight. Next has also recently launched Nextunlimited, a subscription scheme that offers unlimited next-day delivery for a flat fee of £20 a year. This is one of the latest examples of the kind of delivery subscription schemes that were first popularised by Amazon and the grocers.

Fashion retailer Asos has put the focus on convenience, working with carrier DPD to offer highly flexible deliveries that can be rescheduled or diverted to a local collection point, a neighbour or another pick-up point, right up to the last minute. More recently, Asos has also started working with On the dot to provide same-day deliveries to London shoppers.

Online marketplace eBay has focused on developing a click-and-collect service by partnering with both retailers and parcel collection shops with a strong high street presence, from branches of Argos to, most recently, shops operated by Doddle. When the Doddle service launched, Jon Ford, head of shipping development at eBay, said, “Our buyers and sellers are at the heart of everything we do and we want to make shopping and selling on eBay as convenient and flexible as possible. That means providing as many ways to improve the delivery experience for buyers. We already have millions of click and collect-enabled listings on eBay and the collaboration with Doddle will help us extend our collection footprint while also helping sellers on eBay to enhance their fulfilment capabilities.”

The choice and speed of delivery options may drive logistics strategies among leading retailers but across the IRUK Top500, the median standard is still lagging behind. InternetRetailing research shows that across those leading UK retailers, shoppers have a choice of between two and three delivery options. Same-day delivery may be eye-catching but it’s currently offered by only 5% of retailers. Next-day delivery, offered by 57% of Top500 retailers, is the most widely offered of premium options that also include named-day, named-time, Saturday and Sunday



Image credit: eBay

**eBay has rapidly developed a click-and-collect service by partnering with chains with a strong high street presence**

delivery. But across the Top500, standard delivery still takes a median five days and costs a median £4.96.

### Looking ahead

Already, logistics professionals are putting automation to work in warehouses, enabling them to deliver on the fast pace of online orders, particularly around Black Friday time. John Lewis, for example, has used automation to speed up operations at its distribution centre, concentrating on operational efficiencies to remove logistics bottlenecks. Ocado has used small robots to speed up its pick and packing process in its Andover warehouse, and is developing the larger SecondHands robot to act as a warehouse assistant.

Robots are also being used in last-mile delivery, pioneered by food delivery companies including



Just Eat, while Amazon has landed the first UK drone delivery and continues to develop the technology for wider use.

Meanwhile, artificial intelligence is being used to help deal with customer order enquiries. Shop Direct is working with IBM using machine learning in a chatbot that, housed in the very.co.uk mobile app, will answer natural language questions about the progress of their delivery.

In its recent report, *The New Delivery Paradigm*, Accenture suggests that artificial intelligence, robotics, autonomous vehicles, data analytics, augmented reality and the Internet of Things all have a role to play across the supply chain, from automated collections through to routing algorithms that use AI to place goods for faster and cheaper last-mile delivery. Even drones and self-driving vehicles are being considered. Adopting such approaches could create value of up to \$400m (£300m) a year for the average post and parcel organisation, the report suggests.

Brody Buhler, global managing director of the post and parcel industry group at Accenture, thinks that while some retailers and delivery organisations are experimenting with these technologies, and while startups are bringing new approaches, most companies are currently waiting to see what happens. “As they experiment with new models at very different cost profiles, it’s going to be important for all of these delivery organisations to be rotating to these new ways of doing things and taking full advantage of their digital legacy,” he says. “Those that are standing on the sidelines watching and waiting may have already played it too long. There is an urgency here that they are not realising, and are not particularly well-suited to take advantage of. Incumbent organisations are not nearly as agile as startups that are entering this market, and retailers tend to be more agile as well.”

In the end, it is shopper expectations that will change the way consumers expect to buy and expect retailers to serve them. Buhler says, “Consumers have become less and less interested with who is bringing the parcel and more and more interested in ‘Can I get the features I want?’ Will it come when I want it, will it come as fast as I want it, can I control that delivery? Services such as DPD’s Predict offer a much more mobile-enabled, controllable delivery experience. Expectations are evolving.”

If consumers are to set the pace, it seems ever more likely that retailers will measure their service around the convenience that it provides to the customer. Doing so profitably will be critical but meeting the customer’s needs will be more important still. 🇬🇧

# Analysing the numbers

How do leading UK retailers measure up when it comes to Operations & Logistics? InternetRetailing researcher **Fernando Santos** explores the figures that underpin delivery, collection and stock checking findings in this Dimension

RETAILERS THAT STAND out in the IRUK Operations & Logistics Performance Dimension Report do so when they offer delivery and collections services that not only meet but exceed customer expectations. By going the extra mile, they give shoppers a convenient experience, enabling them to take delivery of their online orders wherever and whenever they want.

Our research looked at the delivery promise, to see how wide a range of options were on offer, at the costs, the time delivery would take, collections, and also at the use of stock finder functionality in retailers' mobile apps. Given the growing importance of returns in current retailing, we've focused our findings in this area in a separate research feature on page 32.

## What the Top500 do

More than half of leading UK retailers now offer a click-and-collect service, while the same proportion offer next-day delivery. InternetRetailing research also found that new kinds of services, such as same-day delivery and nominated time delivery, are still relatively hard to find.

For while 55.7% of IRUK Top500 traders enable shoppers to collect their online orders from a shop and 56.8% offer next-day delivery, just 5% offer same-day delivery, and 3%

Same-day delivery is most commonly found in the food and wine and grocery sectors, perhaps reflecting the urgency of food deliveries

deliver at a named time. Named-day delivery is more widely found, offered by 15% of Top500 retailers. Saturday delivery (25.4% of retailers) is more common than Sunday delivery (9.2%).

Standard delivery typically takes up to five days to arrive, with a median cost of £4.95.

Of the 317 retailers that offer free delivery, the median minimum spend to qualify is £49.40.

The average Top500 retailer offers between two and three delivery options.

We consider stock checking from the mobile app to be an emerging and important part of the fulfilment service. When we looked at the Top500, we found that while 16.6% enable users to check stock from the app, only 2.9% offer any extra stock checking functionality, such as the use of a barcode scanner.

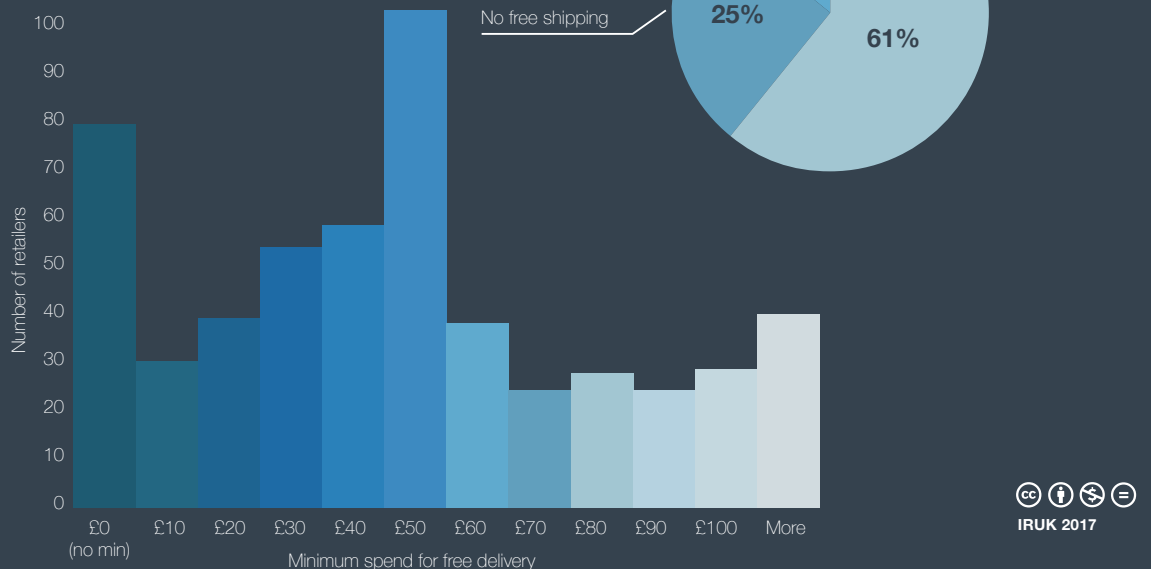
## How the delivery promise varied by category

Click-and-collect services are most commonly found in department stores, where 71% offer pick-up as a fulfilment option. That is followed by apparel (68%), fashion (63%) and footwear (65%) retailers. Almost two-thirds (63%) of grocers also offer click and collect. The service is least commonly found among those trading in the stationery, books and craft category (40%), followed by business goods (46%) and home, garden and DIY (47%).

The threshold for free delivery varies markedly between categories. Those selling books, stationery and craft typically require a minimum spend of £25, followed by health and cosmetics (£30) and food and wine (£31). At the other end of the scale, those selling jewellery,

## Free delivery threshold

How much do consumers have to spend to qualify for free shipping from Top500 websites? Roughly 70 retailers (14%) deliver for free regardless of the order value, while the median Top500 retailer requires orders to be at least £50 before it will cover the delivery cost



department stores and home, garden and DIY require a £50 spend before delivery is free. The relatively low threshold for free delivery in the health and cosmetics, food and wine, and books and stationery markets may reflect the more competitive nature of those sectors, where, in general, the products on offer are not unique to the seller.

Retailers across the sectors offer between two and three delivery options, although retailers selling health and cosmetic products do offer slightly more choice, with an average of 2.9 options, followed by apparel (2.8), general fashion and department stores (both 2.7). An average of 2.2 options are available to customers in the food and wine category, although grocers offer 2.4 options.

The cost of standard delivery is lowest in the grocery category (£3.60) and highest in home, garden and DIY (£6.17), while the time taken for standard delivery during our research was fastest for business goods (two days), food and

wine (three days) and grocery (also three days). It was slowest for home garden and DIY retailers (five days) and department stores (five days).

Next-day delivery is most common in the business goods category, where it is offered by 75% of retailers, perhaps recognising business customers' need for speedy fulfilment. This is followed by health and cosmetics (66%), apparel (58%) and sports and leisure (58%). Only 49% of stationery, books and craft retailers offer the service, while 51% of jewellery and accessories retailers offer it.

Same-day delivery is most commonly found in the food and wine (16% of retailers), business goods (16%) and grocery (15%) sectors, perhaps reflecting the urgency of food deliveries. At the other end of the scale, no jewellery, sports and leisure or accessories retailers offer it, perhaps because there's little demand among customers for this premium service.

Nominated-day delivery is offered by 44% of grocers – perhaps reflecting the need to deliver ►

fresh items to a set timetable – by 34% of food and wine traders and by 28% of department stores. It is least common in the jewellery, stationery, books and craft as well as the sports and leisure categories, where fewer than 10% of retailers in each category offer it. Nominated time delivery is again most commonly found among grocers (27%) and food and wine retailers (20%). No jewellers or retailers selling accessories offer this option.

Saturday delivery is more common among food and wine retailers (46%), along with sellers of health and cosmetics products (41%). It is least commonly found among those selling stationery books and craft (15%) and jewellery (22%). There is less overall take-up for Sunday delivery but it is offered by 19% of grocery retailers and 16% of food and wine sellers, along with 17% of footwear retailers. In keeping with the sector, no business goods retailers offer Sunday delivery. Other categories where it is less commonly found include stationery, books and craft (5%), children's goods (6%) and home, garden and DIY (7%).

### Checking stock

Stock checking functionality is most commonly found on mobile apps from fashion (34%) and apparel (31%) retailers, followed by sports and leisure retailers (18%). But when it comes to extra stock checking functionality, apparel retailers (5%) are behind sports and leisure (9%) and home, garden and DIY retailers. At the other end of the scale, no retailers in the books and craft, grocery, or food and wine sectors offer stock-checking functionality at all.

### What leading retailers did

Asos stood out in this research for its wide delivery offer, with eight delivery and collection options, including the relatively uncommon nominated-day-and-time delivery. Additionally, it offers unlimited next-day delivery for all of its premier subscribers.

## We consider stock checking from the mobile app to be an emerging and important part of the fulfilment service

Amazon is among the few retailers that offer same-day delivery, nominated day and time deliveries among its nine delivery and collection options. Its subscription plan, Amazon Prime, is one of the standout services in this area.

Marks & Spencer has a flexible approach to delivery that includes next-day home delivery for items ordered before 10pm. But it's for its returns policy that it stands out in this Dimension. For more on this, see our second research paper, which focuses on returns (page 32).

Supermarkets Tesco and Sainsbury's both have highly convenient delivery policies. Both offer Sunday, same-day and nominated time delivery. In the home and DIY sector, Screwfix offers Sunday delivery and nominated time delivery. It is also among the relatively small number of Top500 retailers that enable shoppers to check stock from the mobile app. Some 16.6% of Top500 traders offer this, as do 16.6% of home, garden and DIY retailers. 



## IRUK 500 Operations & Logistics Dimension

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The Top100 retailers of the IRUK Top500  
2017 Operations & Logistics Dimension,  
as measured across dozens of metrics for  
innovative practice in this area

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## Operations & Logistics Top50

Accessorize	GO Outdoors	Sainsbury's
Agent Provocateur	Halfords	Schuh
Amazon	Harvey Nichols	Screwfix
Ao.com	Home Essentials	Selfridges
Apple	House of Fraser	Shoe Zone
Asda	Jaeger	size?
Asos	John Lewis	Superdry
Boots	Kaleidoscope	Surfdome
Carphone Warehouse	Littlewoods	Ted Baker
Currys	MAC Cosmetics	Tesco
Debenhams	Mamas & Papas	Very
Dorothy Perkins	Marks & Spencer	Waitrose
Ebuyer.com	Moss Bros.	Wex Photographic
Fashion World	New Look	White Stuff
Fortnum & Mason	Next	Wickes
Freemans.com	PC World	Wiggle
Gear4music.com	Ryman	

## Operations & Logistics Top100

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American Golf	Footasylum	Missguided	Toolstation
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Argos	Interflora	Novatech	Waterstones
Blacks	Jacamo	Overclockers UK	Whistles
Boohoo.com	JD Sports	The Perfume Shop	The White Company
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M&S  
EST. 1884

ASDA

John Lewis

TESCO

Leading

Ao.com  
Argos  
Asos  
Clarks  
Currys

Debenhams  
Halfords  
Holland & Barrett  
House of Fraser  
Mothercare

New Look  
Next  
PC World  
Sainsbury's  
Schuh

Screwfix  
Superdrug  
Topshop  
Waitrose

Top50

American Golf  
B&Q  
Blue Inc  
Carphone  
Warehouse  
Claire's  
Dorothy Perkins

Early Learning  
Centre  
eBay  
Footasylum  
The Fragrance Shop  
Homebase  
JD Sports

Matalan  
Ocado  
Office  
Pets at Home  
Selfridges  
SportsDirect.com  
Topman

Very  
Waterstones  
White Stuff  
WHSmith  
Wiggle  
Wilko.com

Top100

Ann Summers  
Apple  
Bathstore  
Blacks  
Bonmarché  
Cotton Traders  
Decathlon  
Dune London  
Dunelm  
Ebuyer.com  
Evans  
Evans Cycles  
Freemans.com

Game  
Getthelabel.com  
Go Outdoors  
H&M  
H.Samuel  
Hobbs London  
Hotel Chocolat  
Kaleidoscope  
L'Occitane  
Lakeland  
Laura Ashley  
Littlewoods  
M&Co

MajesticWine  
Mamas & Papas  
Maplin Electronics  
Millecs  
Miss Selfridge  
Monsoon  
Morrisons  
Moss Bros.  
Quiz  
Richer Sounds  
River Island  
Ryman  
Shoe Zone

Superdry  
TK Maxx  
Topps Tiles  
Toys ʼR Us  
Wallis  
Wex Photographic  
Wickes  
Yours Womenswear  
Zalando

## Top150

Accessorize  
Adidas  
Beaverbrooks  
Boden  
The Body Shop  
Boohoo.com  
Burton  
Chain Reaction Cycles  
Cotswold Outdoor  
Crew Clothing Company  
Disney Store  
The Entertainer  
Ernest Jones

Estée Lauder  
Fat Face  
French Connection  
Gear4music.com  
Harrods  
Hobbycraft  
Ikea  
Interflora  
Jack Wills  
Jessops  
Jigsaw  
JoJo Maman Bébé  
Joules

Lloyds Pharmacy  
Lush  
Mr Porter  
Net-A-Porter  
Nike  
NotOnTheHighStreet.com  
Pandora  
Peacocks  
The Perfume Shop  
Post Office Shop  
PrettyLittleThing  
Reiss  
Samsung

Simply Be  
Smyths  
Space.NK  
Surfdome  
T.M. Lewin  
Thorntons  
Toolstation  
Urban Outfitters  
USC  
The Works  
Zara

## Top250

Agent Provocateur  
Andertons Music  
Appliances Direct  
Axminster  
BonPrix  
The Book People  
Bose  
Boux Avenue  
CarpetRight  
Cass Art  
Cath Kidston  
Charles Tyrwhitt  
Coast  
Countrywide  
CycleSurgery  
Dell  
DFS  
EAST  
The Edinburgh Woollen Mill  
Ellis Brigham Mountain Sports  
Esprit  
Euro Car Parts  
F.Hinds  
Fashion World  
Feelunique.com  
Figueaves.com

Firebox  
Foot Locker  
Forever 21  
Fragrance Direct  
GAP  
Goldsmiths  
Grattan  
Harvey Nichols  
Home Bargains  
Home Essentials  
Hotter  
Jacamo  
Jacques Vert  
Jaeger  
JD Williams  
Joe Browns  
Jones Bootmaker  
Karen Millen  
Kiddicare  
Kitbag.com  
Kurt Geiger  
La Redoute  
Laithwaite's  
Laptops Direct  
Liberty  
Long Tall Sally

Lovehoney  
MAC Cosmetics  
Machine Mart  
MandM Direct  
MatchesFashion.com  
MenKind  
Missguided  
Mobile Fun  
Molton Brown  
Mountain Warehouse  
Myprotein  
Naked Wines  
Nisbets  
Novatech  
Oasis  
Oliver Bonas  
The Outnet  
Paperchase  
Paul Smith  
Pavers  
Pull & Bear  
QVC  
Radley  
Ralph Lauren  
Reebok  
Robert Dyas

Route One  
Sally  
size?  
Slaters  
SoleTrader  
Specsavers  
Staples  
Sweaty Betty  
Ted Baker  
Trainline  
Uniqlo  
Victoria's Secret  
Victorian Plumbing  
Viking  
Warehouse  
Watch Shop  
Wayfair.co.uk  
The White Company  
Whittard of Chelsea  
Yankee Candle

## Top350

Abercrombie & Fitch  
Aldo  
AllSaints  
Anthropologie  
Arco  
Aria Technology  
Avon  
bareMinerals  
Bensons for Beds  
Berry Bros. & Rudd  
Blackwell's  
Bondara  
Bravissimo  
Burberry  
Buyagift  
Calendar Club UK  
Calumet Photographic

Card Factory  
Charles Clinkard  
Chemist Direct  
Clas Ohlson  
Cloggs  
Costco  
Crocs  
Guitarguitar  
Dr. Martens  
Dreams  
Dyson  
Euronics  
Everything5pounds.com  
Farfetch  
Find Me A Gift  
Fitness Superstore  
Forbidden Planet

Fortnum & Mason  
funkypigeon.com  
Furniture Village  
Games Workshop  
GettingPersonal.co.uk  
Google Play  
Gucci  
Louis Vuitton  
Mango  
Microsoft  
Mint Velvet  
Misco  
Moonpig  
Mulberry  
The North Face  
Orvis  
Overclockers UK

Ideal World  
Just Eat  
L.K.Bennett  
Lands' End  
Lego  
Links of London  
Lipsy  
Louis Vuitton  
Mango  
Microsoft  
Mint Velvet  
Misco  
Moonpig  
Mulberry  
The North Face  
Orvis  
Overclockers UK

Phase Eight  
Photobox  
Plumbase  
Pret A Manger  
Printing.com  
Puma  
The Range  
Rapha  
Rohan  
RS Components  
Russell & Bromley  
ScS  
Snow+Rock  
SportsShoes.com  
Sunglass Hut  
Swarovski  
Tate Shop

Thomas Pink  
Thompson & Morgan  
Tiffany & Co.  
Trespass  
Tripp  
TTS Group  
Ugg Australia  
Vans  
Virgin Wines  
Weldricks Pharmacy  
Whistles  
WorldStores  
Wynsors World of Shoes  
YOOX.com  
Zooplus

## Top500

Abel & Cole  
Achica  
Aldi  
Alexandra  
Armani  
Art.co.uk  
Asics  
Aspinal of London  
Asus  
ATS Euromaster  
Banana Republic  
Barbour  
Barker & Stonehouse  
BBC Shop  
Belkin  
Berghaus  
Bershka  
Betterware  
Betty's  
BookDepository.com  
Bradford's  
BrandAlley  
Brandon Hire  
Build-A-Bear Workshop  
Calvin Klein  
Camper

Cartier  
CCL Computers  
Character  
Chums  
The Co-operative  
Electrical  
COS  
Crabtree & Evelyn  
Craghoppers  
Create and Craft  
Cromwell  
Damart  
Denby  
Diesel  
DJI  
DKNY  
Dobbies Garden Centres  
Dulux Decorator Centres  
Dunnes Stores  
EAT.  
Ecco  
END.  
eSpares  
Eurooffice  
Expansys  
Farrow & Ball

Finlux  
Fired Earth  
Fitbit  
FitFlop  
Flannels  
Fossil  
Fraser Hart  
Fred Perry  
Free People  
G-Star Raw  
Gabor  
GAK  
Gant  
Garmin  
Glasses Direct  
Graham & Greene  
Graze  
Guess  
Habitat  
Hackett  
Hallmark  
Hamleys  
Harper Collins  
Harveys  
Hawkin's Bazaar  
Hawkshead Country Wear

Hi-Tec Sports  
Hornby  
The Hut  
Intersport  
itsu  
IWOOT  
J Crew  
Jack & Jones  
Jewson  
Jimmy Choo  
JML  
John Smith's  
Joy  
Juno Records  
Kärcher  
Kenzo  
Kiehl's  
Lacoste  
Leisure Lakes Bikes  
Lenovo  
LightInTheBox  
Logitech  
LookFantastic  
Lyle & Scott  
Made.com  
Massimo Dutti

Max Spielmann  
Merlin Cycles  
Moda in Pelle  
Mole Valley Farmers  
Montblanc  
Multiyork Furniture  
Nespresso  
Notcutts Nurseries  
Outdoor & Country  
Plumbworld  
Poetry Fashion  
Prada  
Pretty Green  
Pro-Direct  
Protyre  
QD Stores  
Rapid Electronics  
Regatta Outdoor  
Clothing  
Roman Originals  
Rowlands Pharmacy  
SecretSales  
See Tickets  
Sevenoaks Sound and  
Vision  
Superfi

Swatch  
Thomann  
Thomas Sabo  
Timpson  
TJ Hughes  
Toast  
Tommy Hilfiger  
TomTom  
Toolstop  
Urban Industry  
Vax  
Vente-Privée  
Vistaprint  
Vivienne Westwood  
Wagamama  
Warren James  
Watches of Switzerland  
Wedgwood  
Wyevalle Garden Centres  
YumiDirect  
Zavvi  
Zulily  
& Other Stories

# John Lewis: customer-centric delivery



Image credit: John Lewis

John Lewis staff can now advise on stock availability in-store

FOR DEPARTMENT STORE John Lewis, delivery and collection are both part of the all-important customer experience. In its latest financial results, it set out the ways it plans to build on that experience, through improvements including two-hour delivery slots, self-service click and collect kiosks in Waitrose and enabling customers to see both more detailed product information and branch stock availability through the John Lewis app.

“We are confident that our relentless focus on the customer and differentiating our brand from our competitors will set us up for success in the second half, where the majority of our sales and profits are delivered,” it said in its statement for the six months to 29 July 2017.

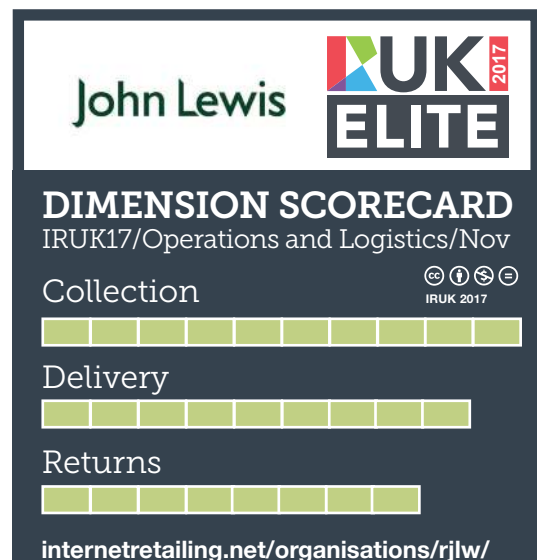
That builds on a delivery promise that includes free standard delivery for orders over £50, next-day and named-day delivery, click and collect from its stores and pick-up from third-party stores through the Collect+ network. Standard delivery for smaller items takes up to five days, Monday to Friday and costs £3.50 for orders under £50. These orders are delivered via a courier. Larger items are delivered by a John Lewis van or come direct from a supplier and take from three working days, arriving within half-day

delivery slots, six days a week. Premium delivery services include next-day delivery and delivery within two-hour or four-hour slots.

Click-and-collect services are free from a John Lewis or Waitrose for orders worth £30 or less, or £2 under that threshold. Orders placed by 8pm are available to collect from 2pm the following day. Returns can be made to John Lewis shops or branches of Waitrose, within 35 days, for an immediate refund.

John Lewis this year put stock information into the hands of its staff in-store, introducing hand-held mobile devices with a Partner app that better equips them to answer customer enquiries. Speaking as this was announced in March, Craig Inglis, John Lewis’ customer director, said, “During the trial in our Cambridge store, customer feedback was overwhelmingly positive. It consistently speeded-up response times to customer queries as partners didn’t need to leave the customer to find answers or complete a purchase. This is just the beginning.”

More than half of John Lewis online orders are picked up via click and collect, and it now plans to introduce auto check-in technology to Waitrose stores to improve the experience for its shoppers. In 2017, according to the John Lewis Retail Report 2017, 53% of online customer orders used click and collect. That’s up from 40% in 2013.



# Asos: focus on convenience

ASOS SEES DELIVERY as key both to its financial success and to its aspiration to become, in the words of Asos chief executive Nick Beighton, the “world number one destination for fashion-loving 20-somethings”. The fashion retailer, which stands out in this performance Dimension for the range and choice of its delivery promise, said that its 26% growth in sales in the year to August 31 2016 had been “driven by strong product, delivery improvements and price investments across our major markets.”

In half-year results, to 28 February 2017, it said that, “Continually enhancing the range of delivery and returns options enables us to move towards our goal of providing a best-in-class customer proposition.” In that six months, it counted more than 100 improvements, including improving the standard delivery time to three days, down from four days previously.

In recent years, pureplay Asos has focused on working closely with delivery businesses in order to ensure it delivers a competitive service to its UK customers.

It was a launch customer for DPD’s ‘Precise’ delivery service, which enables customers to change their delivery time and place until the last minute. More recently it has used On the dot, part of the CitySprint group, to give its

London customers a same-day delivery service, Asos Instant. That service operates across all 122 London postcodes to deliver orders placed by 10am between 6pm and 10pm that day, at a cost of £12.95 per parcel.

“This move from Asos is a recognition of the huge role that convenient delivery plays in acquiring and retaining customers, who expect to be able to shop on their own terms,” said Patrick Gallagher, chief executive of CitySprint, parent company of On the dot, on the occasion of the service launch.

Standard delivery, by contrast, is free for orders worth more than £20, and £3 under that threshold. In the UK, it offers a four-hour estimated delivery window for standard delivery, while its range of next-day services include click and collect and delivery, both free for orders worth £100 or more, as well as precise delivery, that enables shoppers to choose their day and time of delivery, and next evening delivery.

For a £9.95 flat fee, shoppers can also opt to sign up to Asos Premier Delivery UK and get unlimited next-day or nominated day delivery on all of their orders.

Returns are free in many markets around the world. In the UK, these are via a wide range of third-party locations, including InPost lockers, the Pass my Parcel newsagent-based service, toyou at Asda, Collect Plus, Doddle and Hermes stores. Asos also offers free returns via a Hermes courier and via the post, through Royal Mail. 🇬🇧



Image credit: Asos

A strong delivery promise equals strong sales for Asos





# Customer-powered fulfilment

Making the customer the starting point has helped Asda develop click-and-collect and returns services for third-party customers as well as its own

ASDA LEARNED FROM its customers in designing click-and-collect and returns services that now work not only for them, but also for the customers of more than 20 other retailers, says Karen Gibson of the supermarket's toyou service.

Key to its success, says Gibson, senior manager of toyou client relationships at Asda, has been the move to give the customer more control over the process. "We live in a very me-centric society," she told an audience at eDelivery Conference 2017. "We want to be able to do things on our own terms and have control over our own destiny." Making it easier for shoppers to pick up an online order and, especially, return an unwanted product is equally important. "We want to get time back and not to let anything interrupt our day or interfere with what we're doing," she said. "If you keep me waiting for more than five minutes to make a collection or return, you've lost me. If you do it straightaway, that's really convenient for me."

The supermarket designed its click-and-collect service around what it saw that its customers

wanted and then, in 2015, announced it was to open up that service to other retailers. Today, 25 third-party retail brands use the Asda toyou service. Customers of retailers from Asos, Fat Face and Missguided to Chain Reaction Cycles and Ideal World can pick up items ordered online and/or drop off their returns, depending on the individual arrangement. This has opened up new opportunities for Asda.

"Being a retailer, we've always been able to get comments from our own customer base," says Gibson. "For the first time ever, we're able to listen to our partners' customers too. People like the fact that they can do something else while they're dropping a parcel off or picking it up."

Asda was relatively late online, launching its george.com and asda.com websites in 2009, when it used third-party logistics suppliers for fulfilment. Gibson says the Asda team watched and learned from its customers as the service developed. "They liked it and they liked to collect from stores but we weren't getting that fantastic service in terms of customers," she said. "How could we capitalise on the fact that about half of customers were coming into stores to collect? It was very difficult to create efficiencies in any sort of network."

So five years ago, the retailer took the decision to take its logistics in-house and quickly realised that it needed to make itself fit for the future. It started by asking both customers and colleagues how the service needed to change.

"Customers said they wanted a simple journey and that they wanted to adopt technology where it was relevant and intuitive," she said. "Colleagues told us the same thing – they wanted to serve the customer better by having that view of what was going on." In addition, customers said they wanted clear tracking information on both returns and collections.



Image credits: Asda

Customers of both Asda and third-party retailers can pick up or drop off parcels without even leaving their car





The supermarket started with the customer in designing its click-and-collect and returns services

The mantra in designing Asda toyou was about making things easy, from taking a bird's eye view of the fulfilment process from its Rochdale technology centre to, more recently, introducing QR codes for parcel pick-ups that Apple smartphone-owning shoppers can add to their Apple Passbook to notify a member of staff that they've arrived. When it comes to returns, shoppers simply drop their parcel at a dedicated returns point, printing their returns label in-store if necessary. Toyon operates in stores but also outside them too, offering easy drive-in pick up. Such solutions, says Gibson, enable Asda to serve a customer typically in less than three minutes.

"If you start with the customer and work back, you get a completely different dynamic to the relationship," says Gibson. "Why wouldn't you bring things together?"

The way shoppers use the service can also bring new insights. "Customers might tell you what they want but often, what they actually do tells you something different," says Gibson. Now the retailer is thinking about ways that it can improve on the service through, for example, instant refunds, faster service, or by enabling

speedy reordering. This could also lead to a more strategic approach to collection. "A lot of customers tell us they don't want something the same day unless it's an emotive item," says Gibson. "What if we could store stock strategically around the network and sell it strategically, making it available to customers within the hour?"

The retailer is also considering how it might reconfigure communications, moving beyond contacting shoppers using email and text to developing its use of social media, perhaps embedding products into its messaging. "Keeping the brand experience alive right the way through the chain is really important," says Gibson. "We want to open the insight to retail partners. How do we use that information and use it to change what customers are doing in the stores?"

Already, she says, some retail partners are changing their processes, moving away from including Royal Mail labels for returns in favour of encouraging shoppers to take their items back to Asda instead.

These services, alongside a flexible delivery promise, helped Asda to rank highly in IRUK Top500 Operations & Logistics research in 2017. But it's this approach to continuous improvement that's likely to play a part if it is to maintain its position for the future. 🇬🇧



# Tesco: making speed a priority



Image credit: Tesco

Tesco customers across the UK can now collect or have their groceries delivered on a same-day basis

TESCO WAS AT the forefront of delivering online orders as early as the 1980s and this year, it staked its claim to another first as it enabled shoppers across the country to have their orders delivered on the same day.

Back in 1984, the supermarket delivered groceries to Jane Snowball of Gateshead when she placed her order via a television-based online ordering system. This year, it extended a same-day grocery service first launched in London and the South East in 2014. Now it offers the service from more than 300 stores across the UK: shoppers who order before 1pm will get their delivery from 7pm onwards. This, it says, means 99% of UK households can now use the same-day service, from the Shetland Islands to Cornwall, six days a week, or seven in London, for a fee of between £3 and £8. This year's expansion came in response to what Tesco said was an 18% growth in demand for the service in early 2017 alone. "Customers tell us they like getting their shopping delivered quickly and conveniently," said Adrian Letts, managing director of Tesco Online. "With our same day delivery service, they can now order by lunch to get their shopping delivered for their evening meal. We've seen the service grow in popularity since we launched it

in London and the South East, so we're really excited to be rolling it to customers nationwide."

Londoners can get their groceries even more quickly. The retailer launched Tesco Now in June, delivering within the hour to addresses within Central London.

Tesco customers can order online for same-day collection, as well as for delivery at a nominated time and day, or within a flexible four-hour window on a chosen day.

The supermarket also offers a Delivery Saver, enabling shoppers to pay a flat monthly fee of between £3.99 and £7.99 for unlimited home deliveries, as long as each shop is worth £40 or more. A minimum basket charge of £4 applies when orders are worth less than the threshold.

To stop the problem of wastage through over ordering, the retailer offers refunds on non-personalised and unused products that are returned within 30 days, although perishable items must be returned by the 'best before' date.

Non-grocery Tesco Direct small items and clothing can be collected in-store from 3pm the day after an order is placed by 5pm, while standard delivery costs £3 for a two-to-five-day delivery, and £5.95 for nominated-date or next-day (for items ordered by 3pm) delivery. 



# Halfords: balancing online and in-store

HALFORDS' STORES PLAY a significant role in its ecommerce customer service, reflecting a strategy of developing sales channels that complement, rather than compete with, each other. The effect of this strategy is reflected in the fact that 85% of orders placed via Halfords.com were picked up in-store during its most recent financial year. Click-and-collect orders are free to collect in store and are often available within an hour of the online order being placed, making that a very immediate solution for shoppers with pressing needs. Delivery is next-day as standard for orders placed by 8pm and is free to those spending £40 or more. It costs £3.99 for orders under that threshold.

Halfords set out the importance of stores to its multichannel approach in its full-year results, to March 31 2017. "The importance of our store network and service overlay continued to be highlighted by the strength of click and collect, with around 85% of Halfords Retail online orders picked up in store," it said.

"This high proportion of click and collect continues to differentiate us from other retailers, as our online business, instead of cannibalising our bricks and mortar operation, drives footfall into our stores, with over 80% of customers wanting advice or fitting service with their purchase."

The figures showed ecommerce sales growing by 30.5%, or 6.3% on a like-for-like basis that strips out the effect of Halfords' acquisition of online cycle stores Tredz and Wheelies. Overall, its revenue grew by 7.2%, including 8% growth from retail sales, although underlying pre-tax profits, before one-off costs of £75.4m, were down by 7.5% compared to the previous year.

Halfords has focused on in-store services as a way of attracting shoppers to the store, alongside click and collect. It offers more than 30 such services, from fitting car and motorbike accessories to small repairs and assembling cycles. Retail sales related to services rose by 11.1% during the year.

Halfords' then chief executive Jill McDonald, who left the company at the end of September to join M&S, pointed, in its annual results, to the importance of such services to the group's overall strategy. "We have made great progress with our Moving Up a Gear strategy, with increased customer insight and sustained growth in service-related sales being particular highlights," she said.

With its focus on bringing online shoppers into the store, Halfords seems to have found some interesting solutions that work for both its customers as well as for its business. 🇬🇧



Image credit: Halfords

Windscreen chip repair is one of the many services that brings shoppers into branches of Halfords



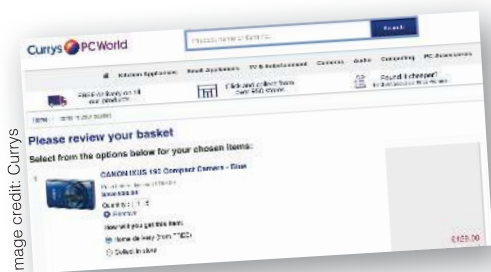
# 12 approaches that work

Shoppers want convenience and free delivery, both of which can eat into retail profits. Some believe that providing a wide range of delivery options at realistic prices is the answer, while others are expanding low-cost collection models as parcel shops proliferate, writes **Penelope Ody**

## 1 Offer the options your customers want

Delivery choices used to be limited to 'standard' – up to a week – or 'express' – within a day or so. Today, delivery information pages on many websites require significant scrolling, with the options from top retailers extending to evening, nominated day, nominated time, next-day, same-day, Saturday or Sunday. Prices vary, with premium delivery options understandably proving quite expensive. Currys, for example goes from free for standard delivery (within five working days) up to £29.99 for a four-hour timed slot next day for large items. At Argos, which stands out for its speed of service, timed next-day delivery for large items is £24.99, while at Halfords, 'bulky items' are £39.99. Accessorize has fewer options, with standard at £3.95 (free on orders over £40) or £5.95 for next day or weekend deliveries.

Customers are often satisfied with more basic services, as highlighted in the recent eDelivery white paper, *Are you delivering what your customers want?* While 31% of consumers surveyed cited next-day delivery as their most popular option, 26% were happy with delivery within three days and 22% content with delivery between three and five days. Take-up for Sunday or evening delivery may be low but if carriers are happy to provide such services, then there's no reason not to offer them to customers – at a price.



Currys signposts delivery and collection options

## 2 Calculate cost to serve

The true 'cost to serve' is an important parameter for multichannel retailers and one which many neglected in the early days of online shopping, when orders were few and the cost of processing and shipping consequently minimal. Today, things are very different. With online accounting for 40% or more of sales in some sectors, many retailers have seen their profitability plummet and the past year has seen some of them introduce charges for click-and-collect or raise the order value needed for free delivery. John Lewis now charges £2 for click and collect on orders under £30, although that may have as much to do with trying to manage queues at the collection desk as cost to serve calculations.

At Marks & Spencer, standard delivery is free for orders over £50 or £3.99 for next-day (curiously, the delivery FAQs don't reveal price of delivery for orders costing less than £50). At New Look it is £3.99 for standard (free over £45) or £5.99 for most other options (free over £100). Halfords has next-day as 'standard' which is free over £40 or £3.99 if not.

Even some pureplays are upping their price. Asos still boasts 'free delivery' but that only applies to standard orders (within five days) costing more than £20. Otherwise, it is £3 or up to £7.95 for a more specific time. Freemans is still free, although £4.50 if you want it the next day. And some are still managing to 'lose' the cost of delivery elsewhere in their pricing structure. Schuh offers free standard delivery and just £1 for next day, 'choose your day', and Sunday deliveries, while a 90-minute delivery service via Shuttl was free, at the time of checking, on orders over £75. All these options are well below their actual cost.

But whichever choices are on offer, understanding just how much packaging, processing, carrier, and maintaining a collection desk actually cost is essential in order to protect the bottom line.



### 3 Find a real place

With pureplays from Amazon to Farfetch taking a foothold on the high street, creating a real-world presence is clearly important – not least for the collection and return of items. Rather than actually buying a bricks-and-mortar operation, joining the physical world can involve partnership deals with established chains. It's been possible to collect eBay purchases from Argos for some years, while Asos orders can be collected from 61 Boots stores. Asos was also an early customer for Asda toyou, which now handles returns and/or collections for more than 20 others, including Wiggle and Chain Reaction cycle stores, Fat Face, Yours and Missguided.

### 4 Expand collection and drop off options

When it comes to parcel collection services,etailers are spoilt for choice. Options include Collect+, Doddle, Hermes' Parcelshop, UPS' network of convenience stores and DPD Pick Up, the latter working with a range independent and multiple retailers, including Halfords and Sainsbury's, to provide convenient pick-up points for customers. Collection options are generally offered at the checkout, as with Gear4music.com, where local delivery locations may include convenience stores and retail stores such as Halfords. With such options steadily increasing, it's important to keep up to date with new entrants in order to maintain the best choices for your customers.

Image credit: Go Outdoors



GO Outdoors flags its courier partner

### 5 Tell them who your carriers are

When it comes to delivery firms, many shoppers get to know the regular drivers and have pet hates: the driver who always dumps parcels on the doorstep and never rings the doorbell, the one who always leaves the garden gate open so your dog gets out, those that push that irritating card through the letter box before you've made it to the front door, or the one who just tosses parcels into the garden.

Make it quite clear on your site which companies you work with and encourage feedback about any poor courier service. Freemans includes "Which courier service do you use?" among its FAQs (it's Hermes). Jaeger does the same (Yodel in the UK, TNT for international orders). GO Outdoors declares "We are proud to be partnering with UK Mail," while Carphone Warehouse goes one better, not only working with DPD but also including a link to DPD's tracking service on its delivery information page.

## 6 How quickly do your customers really need their stuff?

There has been much talk of ‘one-hour’ deliveries in recent years, with the likes of Shutl offering a 90-minute service in urban areas. Sometimes, this kind of service adds value. River Island, for example, offers Shutl as an option for customers using click-and-collect, which is a good tactic since unexpected last minute problems can occasionally prevent a shopper from collecting a vital item.

A study by McKinsey & Company, *Parcel delivery: the future of the last mile*, found last year that while around 23% of global consumers questioned would pay a premium for same-day delivery (€3 or US\$3), only 2% were willing to pay much more than this, while around 70% would still opt for the cheapest delivery option. As McKinsey says: “This is somewhat surprising, as many startups and some large ecommerce players target precisely this small niche with their offering.”

If instant delivery is seen as a key differentiator, then it is likely that those offering such services will have to bear the bulk of the cost – rather like Schuh with its free Shutl option. ‘Losing’ the cost of delivery within your cost structure may be viable for small numbers of deliveries but McKinsey predicts that same-day and instant delivery will probably reach a combined share of 15% of online sales by 2020 and “significantly grow further beyond this date”. Is instant delivery *really* such a vital key differentiator? Or is it just an option that’s nice to have?

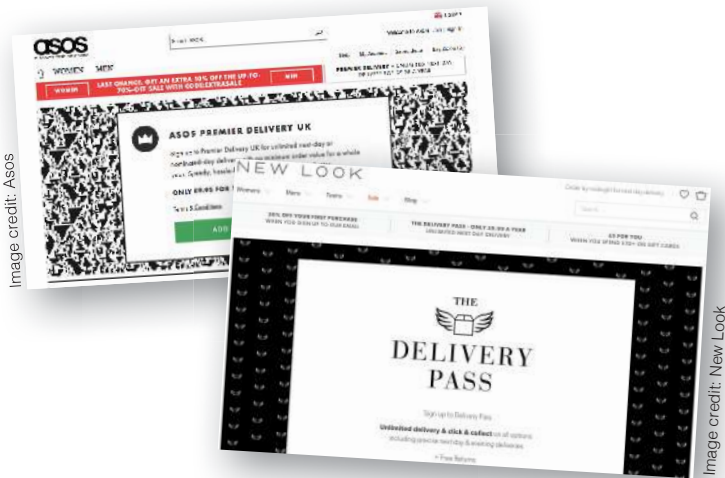
## 7 Make returns easy

Returns are the bane of any e-tailer’s business model. They’re expensive to process, often result in damaged goods and tie up stock in transit which might otherwise be sold to new customers. According to a JDA study, *CEO Viewpoint 2017: The Transformation of Retail*, 74% of retail CEOs believe that the cost of customer returns is eroding profits to at least some extent.

InternetRetailing researchers found that almost 75% of the Top500 will accept returns by post, although only 25% offer drop-off at a third-party location (such as Doddle or Collect+) as an option and just 40% allow returns to store. Even fewer (15%) provide some means of prepaid return and 23% will arrange to pick up unwanted goods from a home address.

For clothing retailers, good sizing charts or tools such as Fits Me and Virtusize can help, yet many shoppers will still order three of each item and return two once they’ve tried them all on. Debenhams has a neat idea as it moves to integrate mobile and store operations. In future, shoppers may be encouraged to use their smartphones to reserve a fitting room when they collect their ordered garments from a store. In this way, they can quickly try all items on there and then choose which they want to keep. This saves shoppers the hassle of returning them later and ensures that unwanted items are quickly returned to stock.





Fast fashion retailers Asos and New Look both offer delivery subscriptions

## 8 Think subscription

Amazon started it all with its subscription delivery service, Prime, but many are following and some analysts suggest that the subscription model, for goods as well as services, could be a major growth area in the years ahead. Online grocers have been offering various low-cost subscription models to encourage loyalty and repeat purchase for some time and, as with Prime, Sainsbury's, for example, also provides additional benefits to its 'Delivery Pass' holders such as bonus Nectar points, prize draws and priority booking for Christmas delivery slots.

The model has also spread to the fashion sector: Asos has 'Premier Delivery' for "unlimited next-day or nominated-day delivery with no minimum order" at £9.95 for the year. New Look has 'Delivery Pass' providing unlimited free delivery (across all options) and click and collect, as well as free returns, for £9.99 a year. Boohoo Premier's unlimited next-day delivery is also £9.99 for a year while Selfridges+ costs £15 a year but is available to both UK (all delivery options) and EU (standard delivery only) customers.

Obviously, the cost of providing free delivery for a year to an avid shopper eats into that customer's profitability, but if it persuades them to shop more often with you, it may well be a price worth paying.

## 9 Make it trackable

Customers like to know where their parcels are in the delivery cycle and, even better, roughly when they will arrive. It's information that can also help reduce all those WIsMO – where is my order – calls to contact centres. Research by NetDespatch published last year found that when asked to identify key aspects of their delivery experiences, 33% of those surveyed put the ability to track their order online first, while 32% gave it as their second key factor; 25% put being notified of the steps in the delivery journey in pole position while for 27%, being given an exact time window for the delivery was the most important factor.

Many delivery companies have already taken such views on board and customers are regularly now emailed on the morning of the delivery day with a time window. Not that it always goes according to plan though. An hour after the previously emailed time window of a recent UK Mail delivery, all this shopper could find on the tracking information was "sorry we appear to be running late." The parcel eventually arrived the following day. If you are going to provide tracking data, it really does need to be accurate and up to date.

## 10 Opt for multiple sourcing

Depending on a single supply source is never a good idea and the same applies to services. The threat of strikes by Royal Mail staff in the run-up to Christmas this year may present many retailers with major problems as they face their period of peak trading. If such strikes coincide with Black Friday, on November 24, this could create a significant backlog of parcels to be cleared just as the Christmas rush gets underway and at a time when many carriers will already be working at full capacity. Working with more than one delivery service provider not only means retailers have existing contracts and relationships on which to capitalise when trouble looms, but also allows them to offer a choice at the checkout so that picky shoppers can avoid their least favourite delivery companies.

## 11 Think global

A recent study from ReBound looking at the returns policies for some 200 fashion retailers, *The Great Returns Race*, found that only 18 of them tailored their policies to more than five geographic markets. Asos and Matchesfashion.com had policies appropriate to every market while Paul Smith covered 71 countries, but 86% of the 118 others who provided only one version of their returns model, tailored this message to the UK alone. Since, according to ReBound, almost two-thirds of fashion shoppers check the returns policy before buying, this lack of country-specific information could clearly be impacting cross-border sales. A significant number of these retailers also only accepted returns within the mandatory 14 day period – another deterrent to overseas shoppers who may need rather longer to return their goods.

## 12 Streamline click-and-collect

Four out of 10 (43%) shoppers experience problems with their click-and-collect orders, according to a recent report, *JDA & Centiro Customer Pulse 2017*. Long waiting times due to a lack of staff is the biggest pain point, followed by staff unable to locate items in store and the lack of any dedicated area for collecting goods, which leaves shoppers queueing at checkouts or trying to find an assistant. The study also suggests that 26% of click-and-collect customers made an additional purchase – either planned or an impulse buy – while in the store.

Click and collect is popular but it can also be an expensive option for retailers to manage since it is one of the fastest-growing areas for carriers, who must collect individual items from distribution depots and deliver them overnight to the relevant store for next-day collection. It would all be a great deal easier if store fulfilment were possible but that requires real-time stock data, by store, to be available on the website so that a shopper knows exactly where and when an item is available for collection.

This is possible though and a few retailers – around 16% of the Top 500 – do this. At Halfords, for example, you can check availability in your local store online and be told that collection will be available within the hour. You can pay in-store as well: a quick, easy and attractive option for shoppers. 🇬🇧

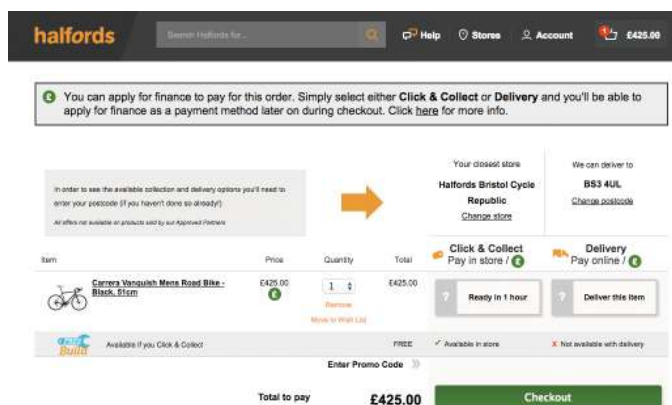


Image credit: Halfords

**Halfords enables shoppers to check stock availability for in-store collection**

# Brexit and beyond

Duncan Buchanan of the Road Haulage Association looks ahead to a world where the UK is no longer a member of Europe's free market or customs union. **Jonathan Wright** reports

THE QUESTION OF what kind of customs arrangements will be in place once and if the UK finally leaves the European Union is one of the biggest issues that Duncan Buchanan has to deal with on a day-to-day basis. It's also, as the policy director of the Road Haulage Association (RHA) jokes, not an issue on which it's easy to offer advice or opinions based on concrete information.

"There are so many unknowns," he says when InternetRetailing asks him what kinds of customs arrangements we may see between the UK and the EU in the years ahead. "You almost always end up sounding like Donald Rumsfeld talking about 'known unknowns' and 'unknown unknowns' but sadly, that is where we are."

For retailers, this is hardly reassuring in that, to continue the homage to the George Bush Jr's gnomish secretary of defense, it suggests a picture of unknown uncertainties up ahead piled on top of the known uncertainties of an already volatile British political and economic situation. Nevertheless, this is the reality with which British retailers, which in recent years have put huge efforts into building international sales, have to contend. In practical terms, what can retailers do to prepare for a post-Brexit world within the logistics parts of their businesses?

Again, Buchanan's words are hardly reassuring. "For the moment, there is in fact very little you can do to prepare," he says.

"For the present, there is very little British retailers can do to prepare for Brexit"

Duncan Buchanan, RHA



That's not to say the RHA, which lobbies on behalf of the road transport industry, isn't putting pressure on the government as it tries to work out how to help its members adapt to a post-Brexit world. Leaving aside the issue of British trucks being able to travel freely within Europe – "That's a technical issue and we expect it to be resolved one way or other, and there will be a system in place" – it has concerns in two main areas:

- Customs and border controls: with the government having already expressed a commitment to leaving the customs union, what arrangements will be in place in the longer term at Britain's ports and at either end of the Channel Tunnel?
- Access to labour: many parts of the supply chain in Britain rely on labour from Europe. Already, there's anecdotal evidence that EU citizens are returning to the continent. How will wholesalers and retailers cope if they can't recruit the warehouse staff and drivers they need? ►



Image credit: Fotolio

**One of the fears over Brexit is that new customs arrangements will make transporting goods more difficult**

The answers to these questions will gradually emerge in the months and years ahead but, even if retailers' scope for preparation is as limited as Buchanan suggests, it's still essential that businesses should at least have an understanding of the issues here. To begin with customs and border controls, Theresa May has made it clear that her vision of Brexit is not the ultra-soft version favoured by parts of the political elite, but would involve leaving the customs union and the single market, in part to enable the UK to negotiate its own trade deals.

But what customs system will replace current arrangements? "We have issues with *de minimis*," says Buchanan. "If something is worth less than 'x', is it still going to need customs clearance? We don't know. The government has indicated that everything is going to require a customs declaration – that'll be import and export, in and out of the United Kingdom – so if that is the case, we would be expecting at least a five-fold increase in the number of customs declarations being

processed. That needs to be resourced. It needs to be resourced in customs, it needs to be resourced in companies that have no expertise in doing customs formalities now. It's a serious issue."

One solution here may be, according to Buchanan, where "you actually declare your goods *before* they get on a ferry, so that by the time you arrive in the UK, or you arrive in France, your goods are already customs cleared". The Norwegian-Swedish model where there is "effectively one border, one customs control, and that customs control does the processes for both sides of the border" is another potential way forward. The trouble here is that nobody is too sure whether either system is going to be adopted and in the meantime, there are worries over whether HMRC is doing enough to prepare for whatever new system is favoured, or even whether the HMRC has enough staff to deal with this increased workload. "We don't think it's credible to believe the existing, under-pressure customs service and border force is going to be able to deal with massive increases in bureaucracy," says Buchanan.

In addition, worries over the M20 persist. It ends at Folkestone and if things back up, it could become a long, permanent lorry park for vehicles waiting to get through customs. For retailers used to a world where “it’s about as difficult to deliver to Düsseldorf as it is to Dorking”, the prospect of stock stuck here for days is disquieting.

### Getting the right people

Turning to the issue of recruitment, as we’ve already noted, jobs in warehouses and driving (and in agriculture too, specifically the grocery sector) are often undertaken by non-Brits. Buchanan says companies in retail and logistics need to be thinking about training staff today to prepare for a world of tomorrow where this labour resource may not be available.


He also advises doing an inventory of in-house expertise. “I would say the labour side is probably the one thing that anyone working in this area needs to be thinking about because that is the one thing you as an employer can control yourself,” he says. “In respect of customs, if you are already importing from outside the EU and you have expertise inside your organisation, handling customs, I would actually recommend that you use the resources you have in your company to train more people, to do that type of work, so that there are people who understand how customs work. That’s actually a necessary protection because, in a year’s time, those people themselves might become very attractive to other retailers, and other people might try to poach them.”

### It’s going to happen anyway...

But whatever preparations retailers make, the fact remains the UK currently still remains on course to leave the EU and that this will be hugely disruptive. If and when it happens, retailers may need to look again at how they operate. In particular, in a world of just-in-time supply chains, retailers may need to think about having more contingency built into the way they operate.

“What people do need to think about is whether or not they are going to need to hold higher stock levels for items if the supply chain slows down and it takes 48 hours to get something through that currently take 24 hours,” says Buchanan. “That may require additional capacity in warehouses for stock. The balance here lies around investing in things that may not be needed, and people don’t like doing that.”

On the plus side, Buchanan points out that UK retailers have long had supply chains and customers outside Europe. Some, thanks to the decline in the pound’s value (sterling dropped as low as \$1.20 in January 2017), may even find they have more such customers in the future, although such optimism needs to be balanced against the inflationary effect of devaluation on the cost of imports.

“Retailers and logistics companies are very adept at managing change, so they will find ways of coping,” concludes Buchanan. “It may not be pleasant, it may actually be expensive, it may involve friction and challenge, but the retail sector is very competitive and very dynamic and reacts relatively quickly to changes in circumstances. They’re used to working in that type of pain. So I wouldn’t be too depressed about the ability of retailers to adapt quite quickly. There may be gaps on the shelves for periods of time until people get used to new arrangements, but those things will be adapted to relatively quickly. And from our point of view, a couple of years is probably sufficient to make the necessary changes within companies.” 



# Research focus on returns

InternetRetailing researcher **Fernando Santos** shines the spotlight on what the latest InternetRetailing research says about returns

RETURNS HAVE TAKEN centre stage in recent months. Walter Blackwood previously led several carrier businesses, is a former director of logistics at Mothercare and is now a consultant to the industry at WMB Consulting. Speaking at this year's InternetRetailing Conference (IRC 2017), he said that the changing economics of returns make it a subject that's set to remain on logistics professionals' agendas for months to come.

Blackwood also noted that while once online returns were a small part of the ecommerce business, the increasing popularity of shopping online means that returns are now the normal way of doing business. "As you buy normal stuff, especially clothing, you're going to get returns," he said. "Not everything fits. People want choices and will order more than one size and colour. They're doing what they would do in a store, only online. In mail order, the returns stream was the key element of profitability. If they didn't get it right, it wasn't an effective proposition. Managing it drives profitability and if you don't do that effectively, you don't have a business. Retailers have to think about returns from the perspective of service and profitability."

In the light of those comments, we took a closer look at what IRUK Top500 research says about returns.

## The Top500 approach to returns

As a group, IRUK Top500 retailers are making progress in offering flexible returns. Almost half (44.5%) now fully refund the cost of the item, while 14.7% refund the cost of the return.

Most give the option of making a return by post, a service offered by 75% of retailers. The option to return an item ordered online to the store is now offered by 39% of Top500 retailers, while 25% enable shoppers to drop an unwanted order off at a third-party location and 23% offer to pick up the item from the house, using a courier. Top500 retailers take a median of ten days to process a return.

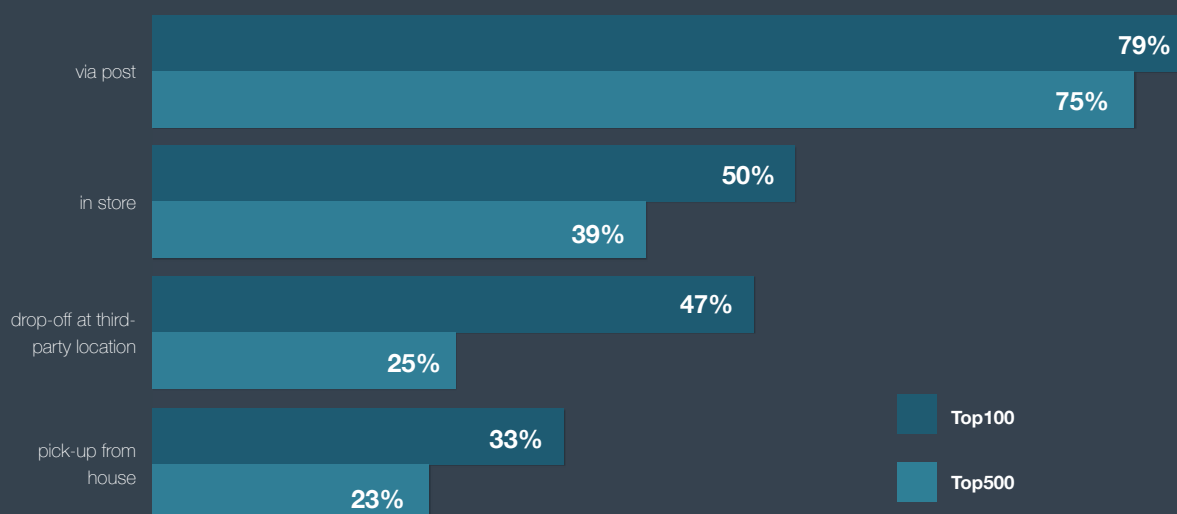
## Across sectors

Footwear retailers offer customers 28 days to send an unwanted item back and 40% fully refund the returned item. This group of retailers is the most likely to offer a return via drop-off at a third-party site, with 48% giving this option. The stand-out service currently offered by this group may reflect the relative difficulty of ordering shoes online. Since shoe sizes vary, shoppers may well find that the ordered item does not fit. That means the service must be more convenient if shoppers are to take that chance.

InternetRetailing research found that more than two-thirds of department stores (68%) fully refund the cost of returned products, that 27% also offer pre-paid returns and 28% refund the costs, such as postage, involved in returning a product. They offer an average of 42 days to return an item, and 52% accept online returns in the store.



## Return options offered by the Top100, and the entirety of the Top500



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Grocery retailers are less likely than that to offer full refunds (42%) and returns via post (46%) but they are the ones most likely to offer nominated day delivery, with 44% offering the service – followed by department stores (28%). In our research, health and cosmetics retailers took the longest to process a return at 14 days, the same as home, garden and DIY retailers. This latter sector are most likely (41%) to offer pick-up from a house or address, and are among the most likely to fully refund an item, with 61% of retailers in this category doing so. Business goods retailers are also likely to offer to pick up a return (33%) yet the least likely to fully refund items: just over a third (38%) of sellers in this category do so.

### How leading retailers perform

Asos offers more choices in returns and are one of the minority to take things back via a pick-up from the house, as well as via pre-paid returns. Screwfix also offers pick-up from the house, while the option of pre-paid returns is given by both Amazon and Sainsbury's, which stand out in this Dimension for their delivery performance.

Marks & Spencer gains a high place in this Dimension primarily for its flexibility around returns. It offers pre-paid returns as part of a policy of refunding the cost of returns. It also enables shoppers to return an item via drop-off at a third-party location or to the store. 🇬🇧

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# Conclusion

Convenience is a word that we've come across time and again while looking at the promises that retailers make to their customers around delivery, collection and returns. It's come up in our case study examples of services designed by retailers including John Lewis, Tesco and Asos. It came up in our piece featuring Karen Gibson of Asda's toyou service, who explained that when a service is easy and straightforward, it's so much more likely to bring the customer back another time. It also appears throughout our research features. Indeed, the strategic overview that opens this report argues that convenience is now the main driver of logistics strategies. That's not surprising when the experience of operations and delivery is a part of the customer experience, as we argue in our introduction.

Of course, a service can only be convenient if it works and for that to happen, many smaller processes have to function seamlessly. In an industry where much of the process is outsourced, we see examples of operations and logistics done very well, but also examples of retailers who are still very much on their way towards achieving that ambition. What we've found from our 2017 research into this area is that things are improving. More than half of the Top500 now enable shoppers to collect purchases from a store and get them delivered via next-day delivery. We've mapped metrics that show some forms of delivery, such as same-day and named-day, are still much less widely offered. But these are approaches that are still very much at the cutting-edge and when we return to this area in a year's time, we expect we'll see more people offering services that move towards such levels of convenience.

But these services necessarily come at a cost, whether it's one that's overtly charged for, as both Tesco and Amazon do, or whether it's one that's added to the cost of the item. Good delivery, collection and returns services aren't cheap – but they are important. After all, as we said earlier, they have to work properly if retailers are to offer customers the convenient service that they now demand.



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