

Same-day delivery: The True Gamechanger

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Overview

Over the past few months customers have moved quickly to online shopping. Retailers, across different verticals, are looking for ways to quickly deliver their products to customers.

Online grocery sales grew over 9% to a record-setting \$7.2 billion, compared to May's \$6.6 billion. This continued growth is driven by a 16% increase in the total number of orders in the past 30 days (85.0M vs. 73.5M in May) and relatively strong spending per order (\$84 in June vs. \$90 in May). - June 2020 Brick Meets Click/Mercatus Grocery Shopping Survey, US.

Retailers are faced with a need to immediately transition from in-store sales to fast and reliable delivery.

What is Same-day Delivery?

Same-day delivery implies delivery of products in less than 24 hours or within the same day.

For example, a customer processing a product purchase in the afternoon will receive it the next morning. Although delivery does not take place on the same day, it is still called same-day delivery.

Same-day delivery is not a magical teleporting system to deliver products to customers. It involves tricky logistics to ensure that products reach customers in good condition and in quick time.

Same-day delivery has truly pushed the boundaries of last-mile delivery. This e-book will cover:

- Same-day delivery: A general perspective
- Why do consumers in the US prefer same-day delivery?
- Prerequisites of same-day delivery
- What makes same-day delivery a real game changer in last-mile delivery?
- Future of same-day delivery



Same-day delivery: A general perspective

Same-day delivery of merchandise and groceries to consumers represented 249 million packages in 2018, which is only about 2 percent of all domestic parcel deliveries. - Same-Day Delivery: Implications for the U.S. Postal Service, January 8, 2020

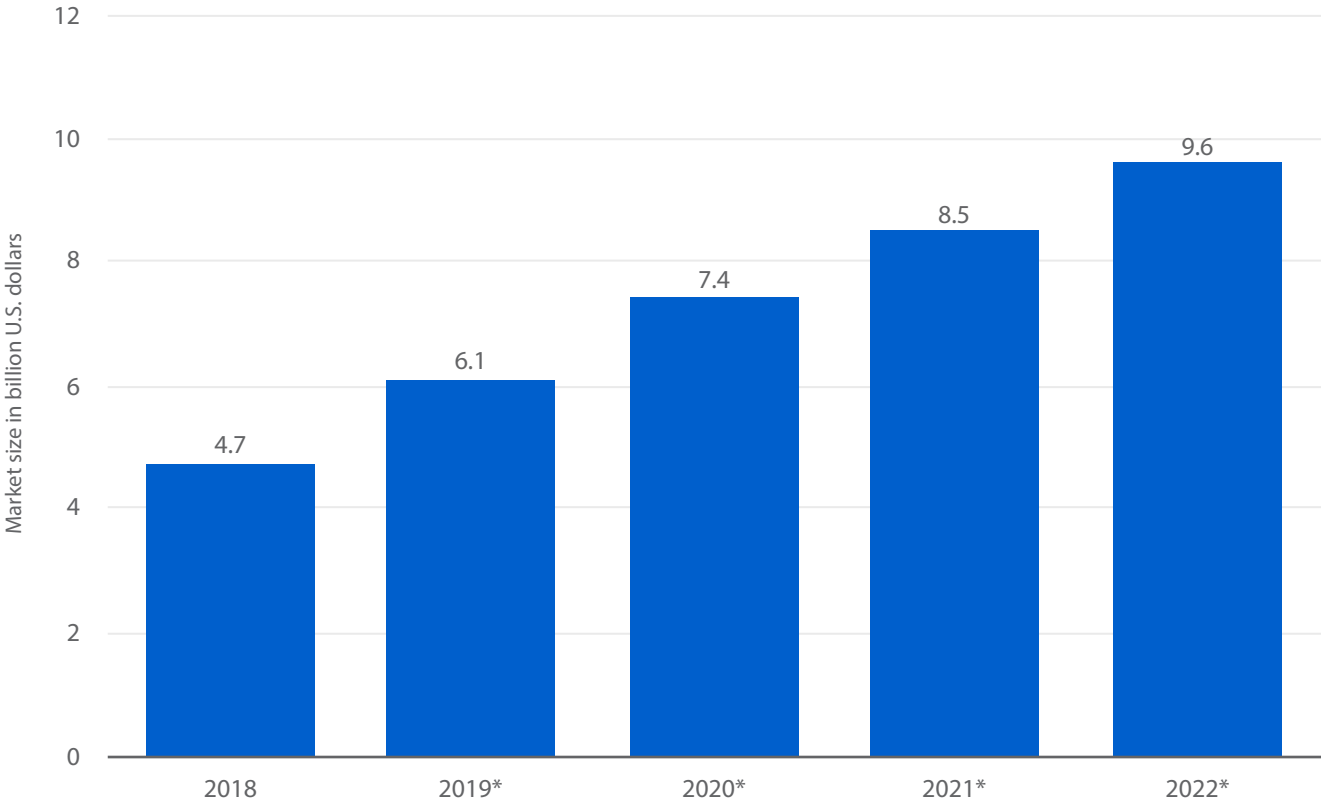
Though same-day delivery is a rapidly growing market, it appeals mostly to urban millennials. Even if consumers are interested in same-day delivery, it only applies to urgent needs like medications and groceries. This was true until the COVID-19 global pandemic happened.

Same-day and instant delivery, however, are the fastest-growing segments in the last-mile environment, growing by 36% and 17% annually. - Future of the last-mile Ecosystem, Jan 2020, World Economic Forum.

The COVID-19 outbreak has ensured that speed of delivery is now important across most verticals. It is, in fact, a core factor of customer satisfaction. The outbreak has made same-day delivery more of a necessity than just a luxury.

Same day delivery market size in the US from 2018 to 2022 (Source: Statista 2020)

Year	Market size (in billion US Dollars)
2018	4.7
2019	6.1
2020(Prediction)	7.4
2021(Prediction)	8.5
2022(Prediction)	9.6



Why do consumers in the US prefer same-day delivery?

Consumers in the US prefer same-day delivery for many different reasons. Here are a few of them.

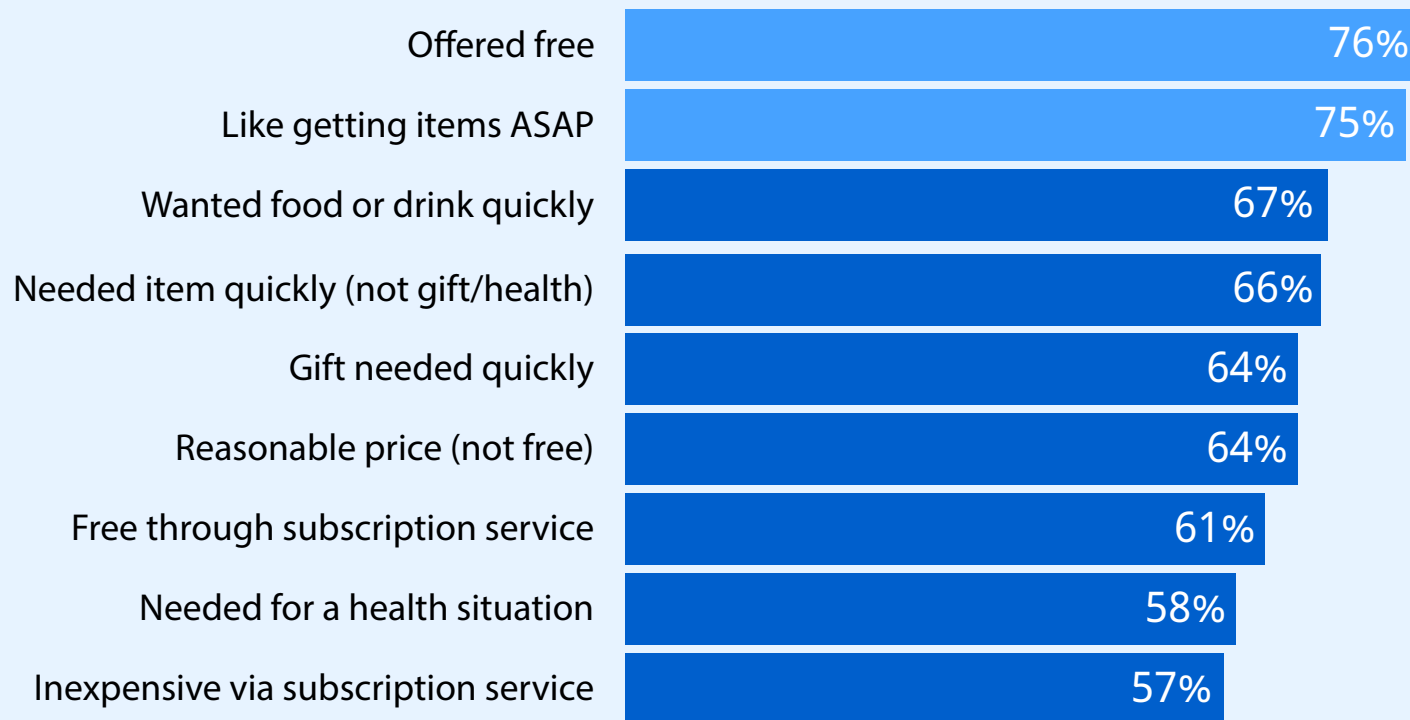
- Free delivery or a limited subscription fee
- Health emergency
- Fast delivery options
- Immediate requirement of food or drink
- Quick need of a gift, and so on.

Here are more insights on the US customers opting same-day delivery and what prompts them to do so.



Reasons for selecting Same-day Delivery

Three-quarters of customers say they choose same-day delivery when it free or because they like getting things ASAP.

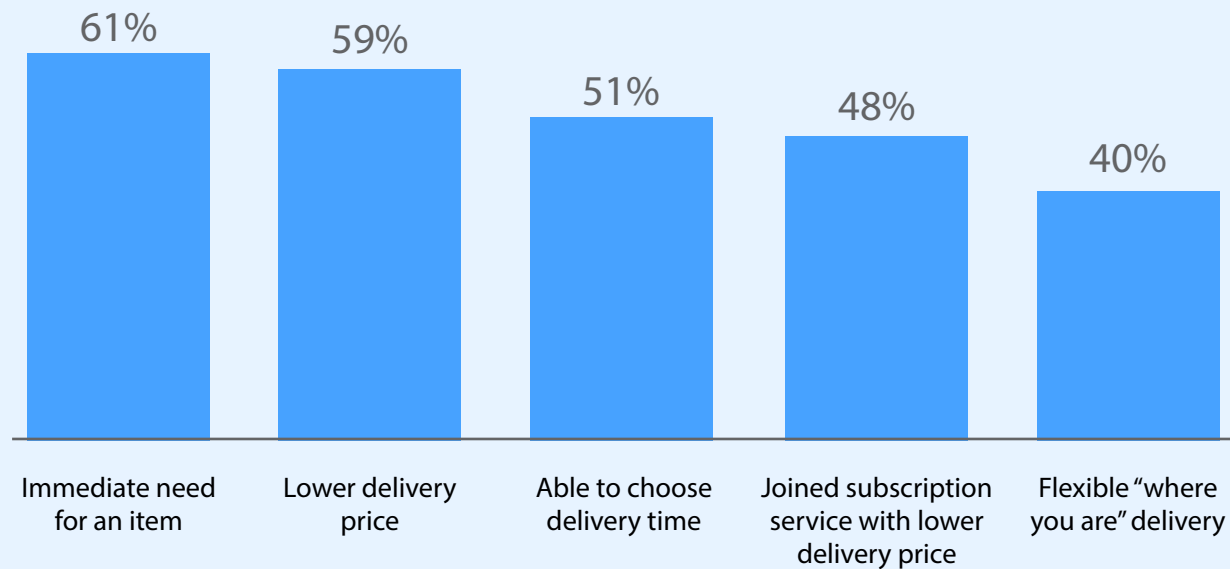


Source: OIG consumer survey (Among same-day purchasers, n=1,062)

What could prompt consumers to choose Same-day Delivery more often?

Six out of ten customers would choose same-day more often if they had urgent needs or delivery was cheaper.

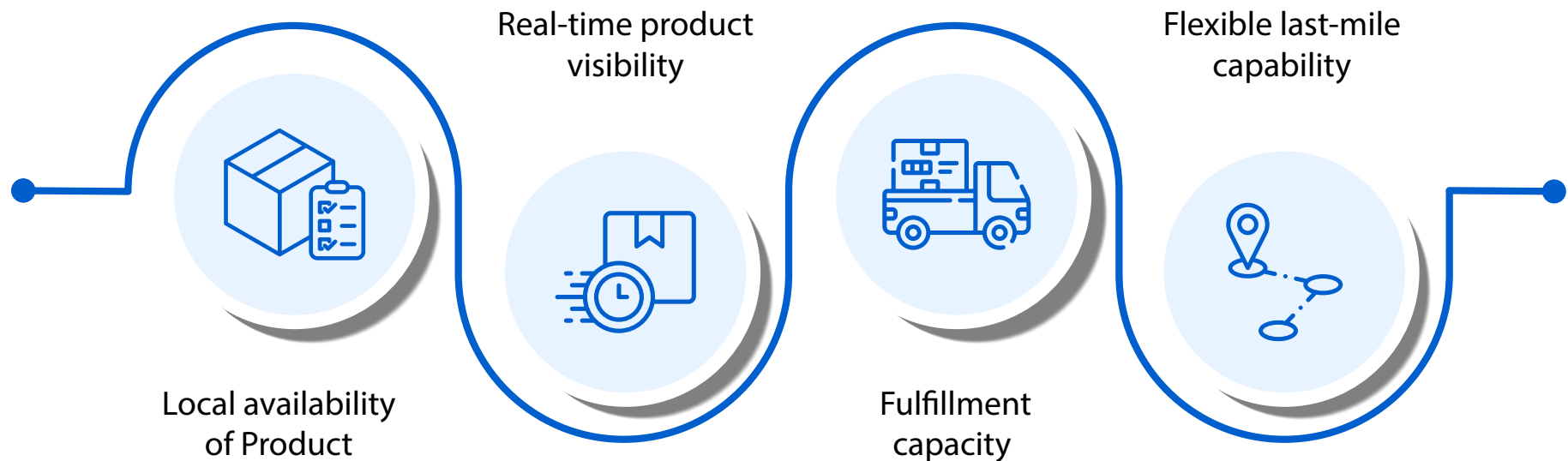
Which of the following would induce you to select same-day shipping more often?



Source: OIG online consumer survey (n=2,572)

Pre-requisites of same-day delivery

There are four prerequisites for same-day delivery. They are:





- **Local availability of Product**

Retailers generating enough volume of locally available products for frequent pickups and deliveries are crucial for same-day delivery. Same-day delivery is a service that is limited only to some urbanized areas and not for the entire population of the country.

With their network of stores, multichannel retailers already have local product availability. But online retailers should invest in building up a network of local warehouses.

- **Real-time product visibility**

Real-time tracking in warehouses and outlets enables retailers to determine the availability of goods for same-day delivery during the checkout process. Retailers should invest in IT infrastructure to enable this.

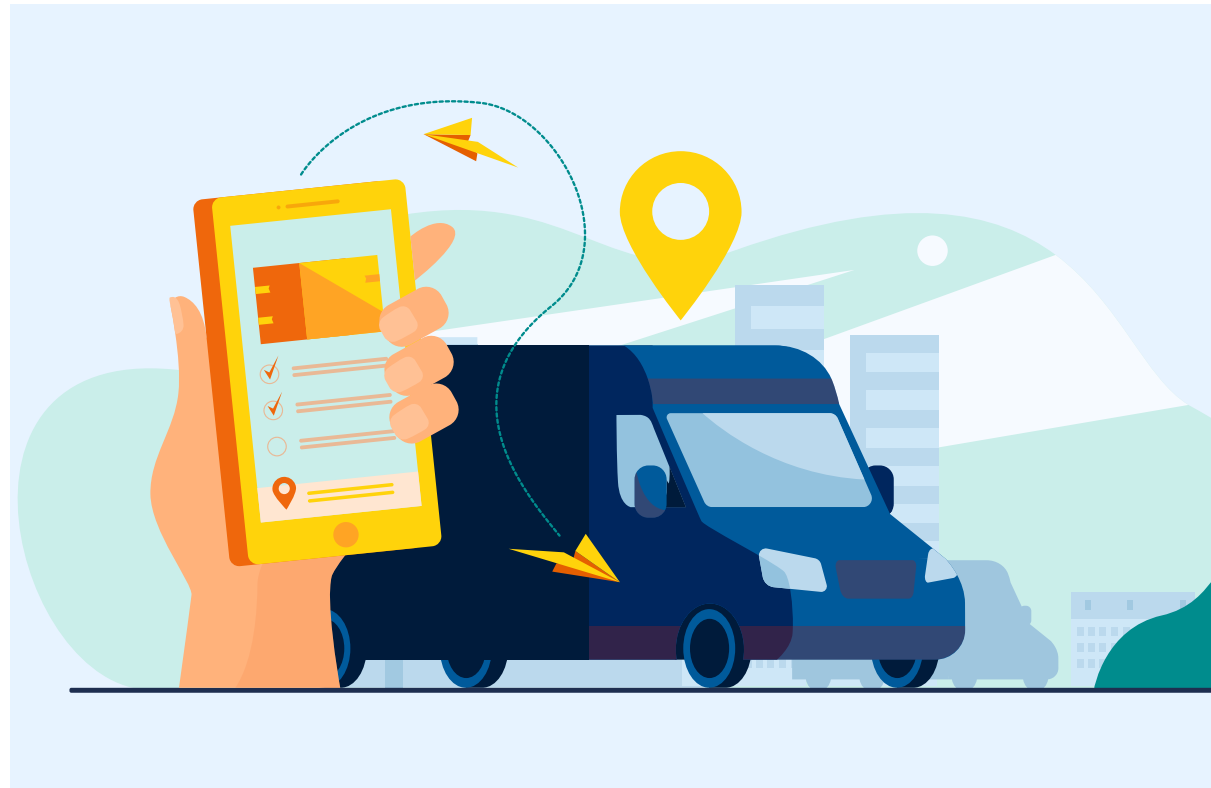
- **Fulfillment capacity**

Retailers should make sure that their picking and packing processes are quick and fast-tracked. Amazon has shown that investing in logistics infrastructure can reduce the lead time. Hence, retailers should develop their abilities to efficiently fulfill their orders in-store, before shipping orders from the store.

- **Flexible last-mile Delivery**

Dynamic routing helps to respond to new shipment requests instantly. It ensures great customer satisfaction.

What makes same-day delivery a real game changer in last-mile delivery?



The changing customer expectations, rapid e-commerce adoption, and increasing urbanization are crucial factors driving same-day delivery. Same-day delivery has genuinely changed the general perspective of [last-mile delivery](#) in many ways.



Same-day delivery= Convenience of online shopping + Quick Product access

The rising share of online retail has been a driving force for the evolution of quick and efficient delivery services.

The next-day or same-day delivery is an industry-standard in developed countries. But the upcoming evolutionary step is affordable same-day delivery.

Same-day delivery enables delivery of orders within a few hours after purchasing them or in a [preferred time-window in the same-day](#). It has redefined the last-mile delivery from a mere delivery to people to ensuring a delightful customer experience.

Evolution of B2B parcel delivery

	Deferred delivery	Next-day delivery	Same-day delivery
Delivery time	 3-5 days	 1 day	 1-12 hours
Typical use case	Mail-order deliveries <i>"I want to try on those clothes i found in the catalog at home and I don't mind waiting for a couple of days."</i>	E-commerce deliveries <i>"I want to get the new camera I found online for a cheaper price than in the electronics shop as quickly as possible, otherwise I'll just buy it in the shop."</i>	Urgent deliveries <i>"I need a new suitcase before tomorrow, but couldn't find the one I like in the shop next door. I don't have the time to check out other stores, but I need it today."</i>

Source: Mckinsey

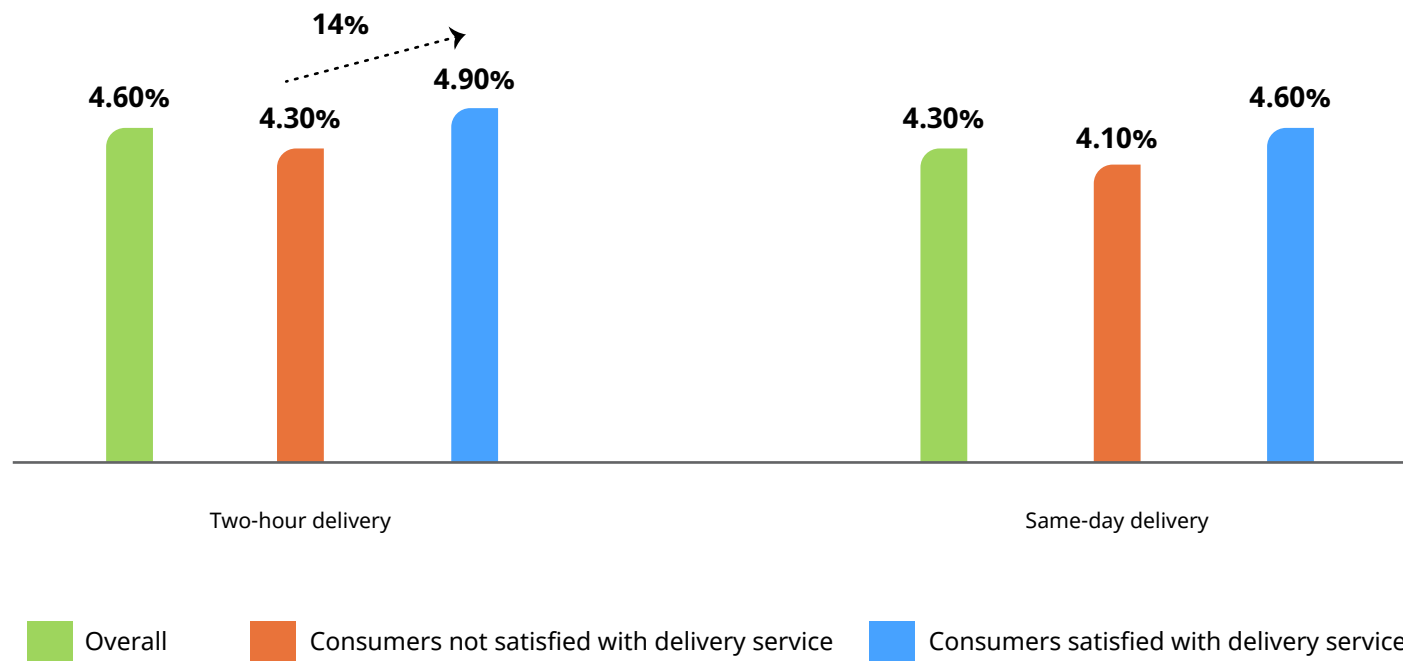


Willingness to pay higher delivery charges for fast delivery

41% of consumers are willing to pay a charge for same-day delivery while nearly a quarter (24%) of shoppers said they would pay more to receive packages within a one-or two-hour window of their choosing. - Pwc, Global Consumer Insights Survey, 2019

Consumers, especially in the metropolitan areas, are willing to pay a premium for same-day delivery. This provides an opportunity for companies to balance their [last-mile logistics costs](#).

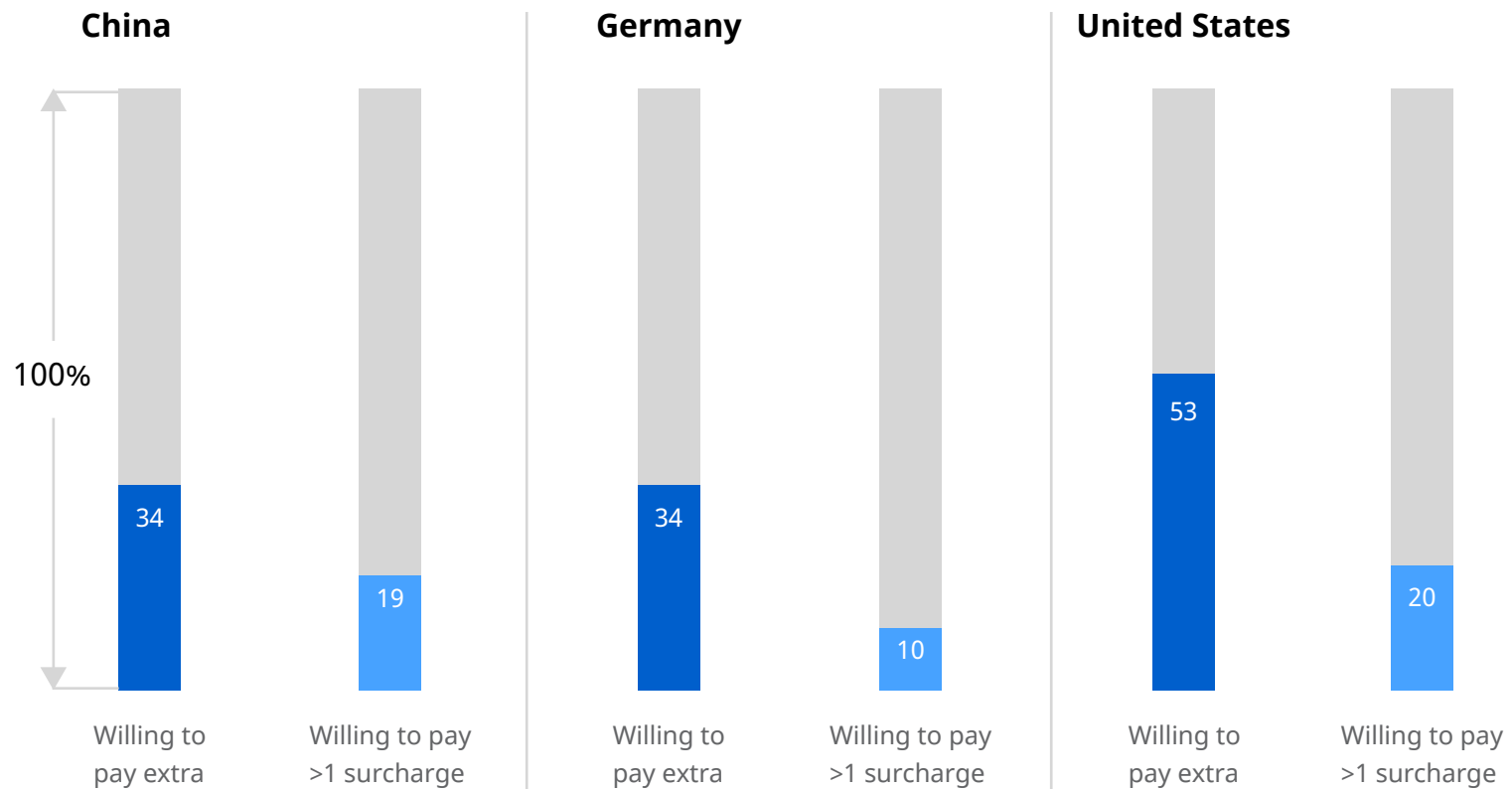
Percentage of the order value consumer are willing to pay for delivery



Consumers from the highly developed urban areas have great expectations for delivery. Despite the limited willingness to pay extra for same-day deliveries, the US consumers have at least a general interest in it. The acceptance of higher fees for faster delivery varies between countries.

Acceptance of higher fees for faster delivery varies by country.

Willingness to pay for same-day delivery, % of respondents (n=4,700)



Source: McKinsey Future of Last Mile study

Market developments around same-day delivery

Dot com era

Startups like Webvan and Kozmo identified same-day delivery as an opportunity. But they failed to build a sustainable business model around it.

Amazon ups its game

Amazon, after the 2010s, had started to develop same-day delivery in several cities.

Walmart and Alibaba add multi-channel

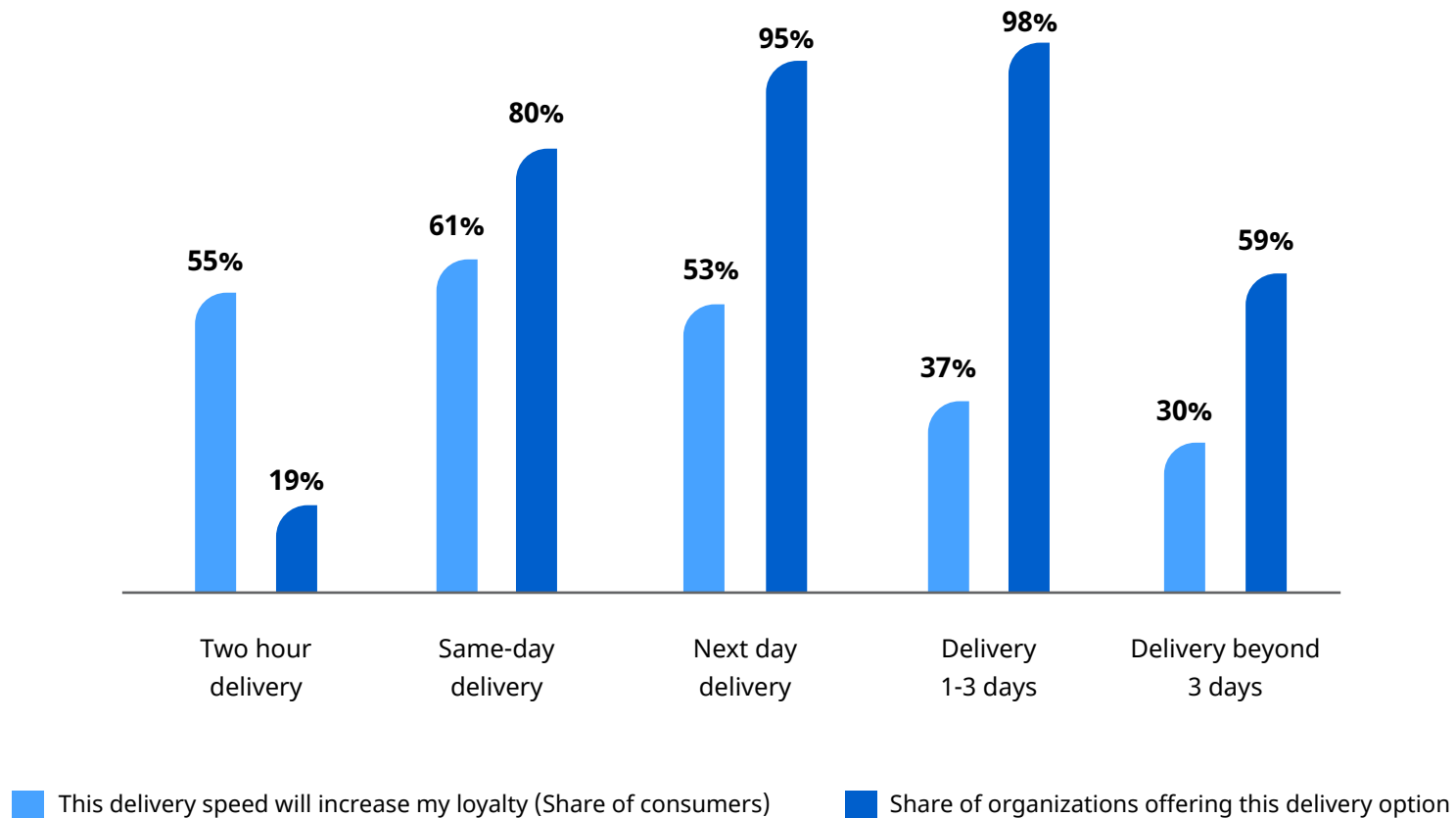
Walmart and Alibaba are upping their same-day delivery ante too.

E-commerce-savvy cities like San Francisco, London, New York, or Berlin are the main centers of same-day delivery's development. It will take some time for same-day delivery to penetrate less developed and emerging markets.

Builds Customer Loyalty

55% say that a two-hour delivery option would increase their loyalty and 61% say the same for same-day delivery. But when delivery moves out to three days or more, only 30% say this will increase their loyalty.- Source: Capgemini Research Institute, Last-mile delivery consumer survey, October-November 2018.

Faster delivery options, like same-day delivery, increases customer loyalty. Despite the opportunity, only 19% of firms offer two-hour or quicker delivery. Developing faster delivery options enables a firm to meet its consumer expectations and differentiate themselves from their competitors.



Same-day delivery: A Necessity

23% of online shoppers do not mind paying additional shipping fees to receive their parcels on the same day. - Parcel Delivery, The future of last mile, Mckinsey and Company, Sep 2016.

Customers want their orders delivered to their doorstep, even if it means premium prices. Thus, next-day delivery has become a matter of the past. Same-day delivery is no longer a luxury but an inevitable necessity. If retailers cannot satisfy customer's appetite for same-day delivery, they will risk losing the market.

New Delivery solutions and models to develop same-day delivery

Same-day delivery requires processing and delivering an order within a few hours. This complex challenge demands new types of networks. The present processes that logistics providers use are not suited for same-day delivery at scale.

Managing a large volume in a same-day delivery network demands extensive upfront investment. Logistics businesses require a sophisticated asset and capability base to reach an optimum speed for same-day delivery and achieve higher price point for their service.



Logistics businesses have started to create networks to fulfil same-day delivery at scale. Three archetypes have been identified for this purpose. They are:

Brokers of courier capacity

Multichannel retailers building their own fleet

Parcel logistics provider enabling same-day delivery

- **Brokers of courier capacity**

Retailers use some broker platforms to offer scheduled delivery and provide access to existing courier capacity

- **Multichannel retailers building their own fleet**

Some giant E-commerce companies maintain their own fleets to handle same-day deliveries. They add additional charge to the product's rate.

- **Parcel logistics provider enabling same-day delivery**

It involves transportation through existing logistics providers with an additional delivery charge. The infrastructure and processes of parcel logistics companies are optimized for next-day delivery. Their biggest challenges are to enhance existing assets and capabilities. As same-day delivery requires intra-day pickup and delivery with a maximum of one transition point, parcel logistics providers struggle to offer it.

It is the cost constraint and delivery volume that determine all the three archetypes of same-day delivery networks. These same-day network models have helped logistics businesses to execute cost-effective last-mile deliveries.



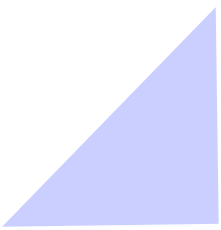
Backroom Automation for same-day delivery

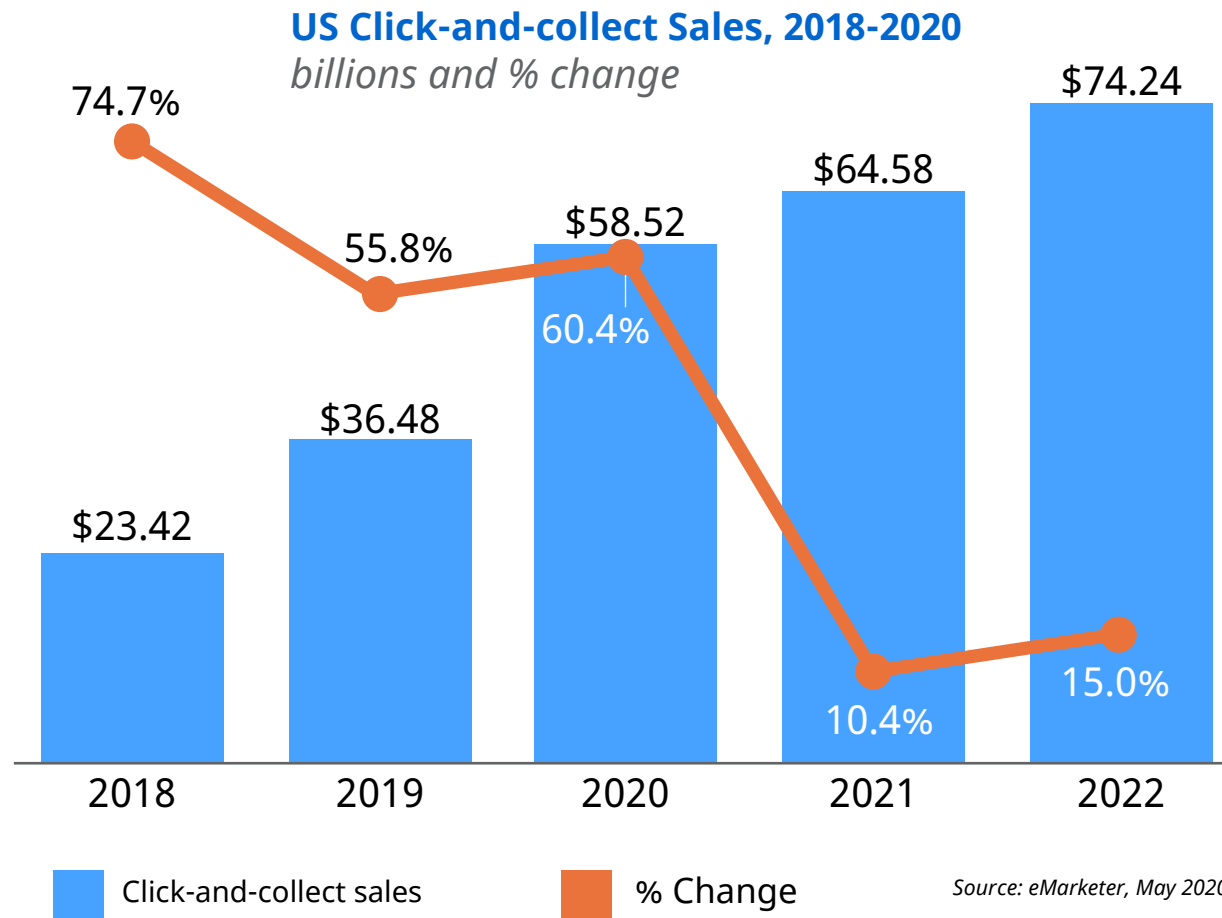
89% of organizations are now investing in mechanization and automation of store backrooms to help expedite fulfillment and deliveries. -Capgemini, The Last-mile delivery challenge, 2019

Customers are increasingly turning towards same-day delivery and click & collect services. A higher proportion of in-store sales come from online orders. Thus, retailers should seriously explore the amount of space dedicated to sales floor backrooms that act as mini-warehouses.

Mechanization and automation become crucial to execute fulfillment of orders. Hence, retailers are investing in technologies that support the mechanization and automation of store backrooms.

Backroom automation could potentially increase profit margins by 14% by reducing the fulfillment cost for click-and-collect orders and deliveries from the store. - Capgemini, The Last-mile delivery challenge, 2019.





Exciting Information

Alibaba's store, named Hema, functions both as a store and delivery center. Its employees send online customer orders to delivery centers through conveyor belts. Its arrangement ensures that consumers within three kilometers receive grocery orders within 30 minutes.

Increased use of dark stores for delivery



One in four organizations use dark stores for same-day deliveries and found delivery costs are 23% cheaper than conventional stores for same-day deliveries. - Capgemini, The Last-mile delivery challenge, 2019.

Dark stores are retail outlets that cater exclusively to online shopping. It is a [D2C model](#) that enables services like online purchases, same-day delivery, or pick-up in stores. The use of dark stores has increased since the outbreak of COVID-19.

Earlier, retailers were using a centralized fulfillment model that attracts longer delivery times and high distribution costs. Today, customers require orders to be delivered within hours.

Instead of picking up orders from open stores, tech-savvy retailers add more dark stores that serve as local fulfillment centers. Dark stores give them a cost-effective way to make strategic inventory choices by location.

As dark stores are closer to delivery locations, delivery costs are cheaper than conventional stores. Fulfillment from a dark store eliminates disruption in in-store activities.

If deliveries from dark stores increase by 50%, profit margins could grow by 7% as a result of lower delivery costs and higher delivery throughput compared to stores (while also not affecting store operations). - Capgemini, The last-mile delivery challenge, 2019

Increased use of mobile phones

58%

of consumers say that the ability to search for items that are available for same-day delivery matters to them when buying products online. - UPS Pulse of the Online Shopper: Retail Fundamentals, 2017

64%

of online consumers expect orders placed by 5 p.m. to qualify for next day delivery. - UPS Pulse of the Online Shopper: Executive Summary, 2017.

61%

expect orders placed by noon to qualify for same-day delivery. - IBID



The increasing use of mobiles has made consumers chant the mantra “See now, Buy Now, How fast can I get it?”.

The concentrated population of millennials, high-end consumers, and dual-earner families are mostly in large metropolitan cities. These urban shoppers mostly make their same-day delivery purchases using mobile. Mobile has become a crucial component that will drive more same-day deliveries in the future.

74%

The infographic consists of three blue-outlined boxes connected by a blue line. Each box contains a percentage and a descriptive sentence. The first box on the left contains '74%' and text about mobile purchases. The middle box contains '51%' and text about online purchases using cellphones. The third box on the right contains '45%' and text about the importance of same-day delivery. The boxes are connected by a blue line that starts at the top of the first box, goes down, then up to the top of the second box, then down, then up to the top of the third box, and finally down to the bottom of the third box. There are blue circular dots at the top and bottom of each box where the line connects.

of urban shoppers have purchased products on their mobile device. - UPS Pulse of the Online Shopper: The Savvy Shopper, 2017

Roughly half

51%

of Americans report making online purchases using their cellphones. 77% have purchased something using their cell phones - Pew Research Center Survey, 2016, Online Shopping and purchasing preferences.

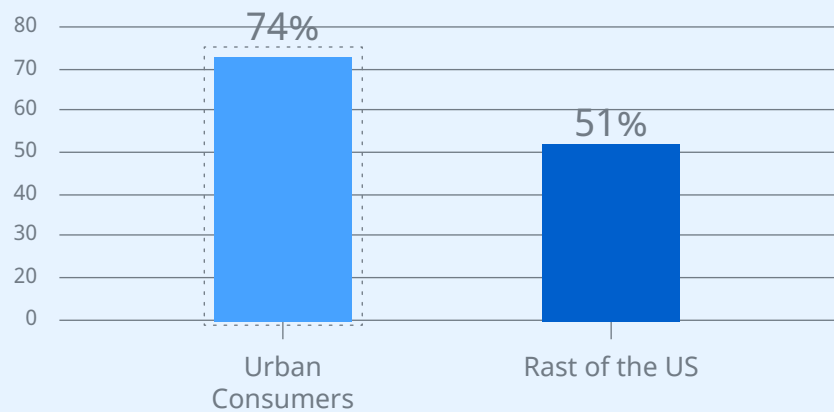
Moreover,

45%

of urban shoppers believe physical store same-day delivery is important (as opposed to 34 percent of suburban shoppers). -IBID

Urban consumers are increasingly using their phones...

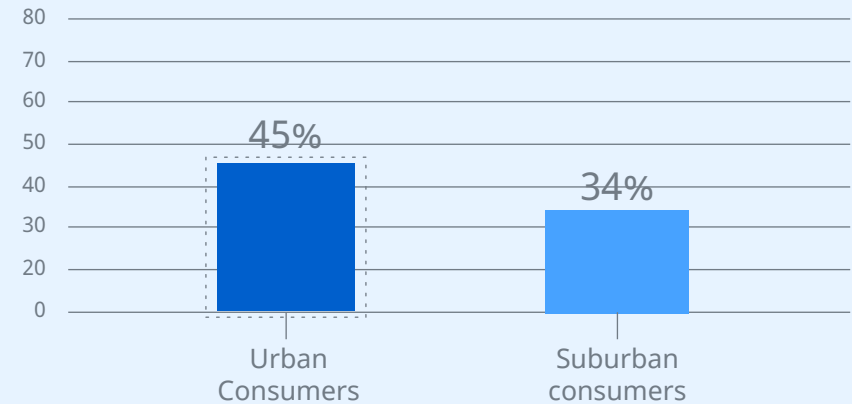
Percentage of consumers who have used their phones to make a purchase



Sources: UPS Pulse of the Online Shopper, Executive Summary, 2017.
 Andrew Perrin, "10 facts about smartphones as the iPhone turns 10," Pew Research, June 28, 2017, <http://www.pewresearch.org/fact-tank/2017/06/28/10-facts-about-smartphones/>.

...and expect same-day delivery

Percentage of consumers who believe same-day delivery is important



Source: Andrew Perrin, "10 facts about smartphones as the iPhone turns 10," Pew Research, June 28, 2017, <http://www.pewresearch.org/fact-tank/2017/06/28/10-facts-about-smartphones/>.

Initiating Fulfillment centers closer to consumers



Retailers have been using their existing store infrastructure to fulfill same-day deliveries and serve in-store customers. This approach has caused inefficiencies and poor consumer experience in the store.

Retailers have used different approaches like [Buy Online Pick up in Store](#) (BOPIS). There is a chance of higher chance of quicker fulfilment by completely leveraging store inventory and store associates. Hence, they are attempting to bring fulfillment centers closer to consumers. This approach saves a considerable amount of time and costs in the last-mile delivery.

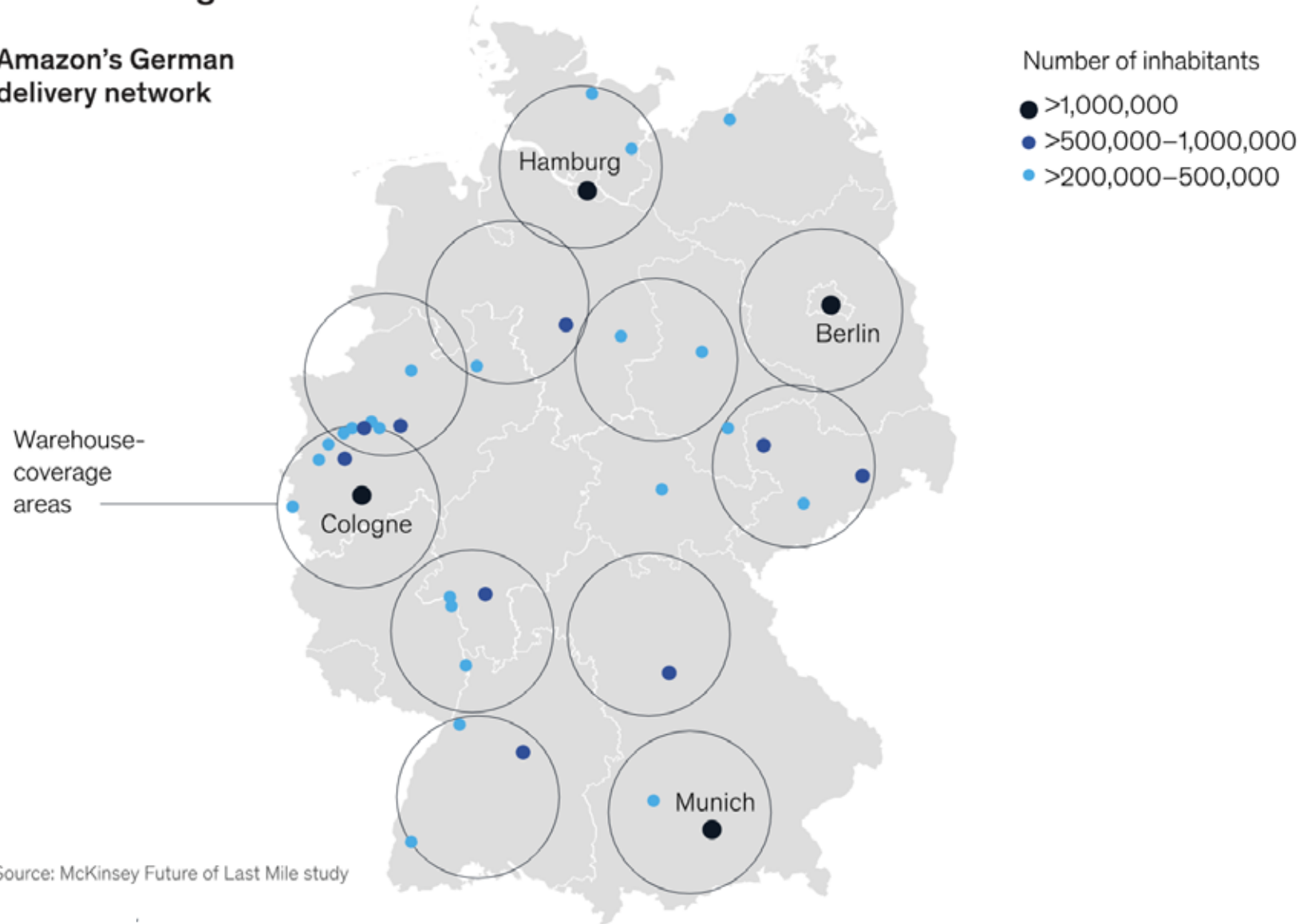
Bringing urban fulfillment centers closer to consumers enables retailers to effectively and efficiently execute same-day delivery. But there are high costs involved in developing an urban delivery services network.

Amazon's Germany idea

One of the most significant requirements for successful same-day delivery is a dense network of warehouses. Amazon built dense delivery networks to provide same-day deliveries in Germany. They have built 11 well-placed warehouses that can stock and move the same assortment from click to ship within two hours.

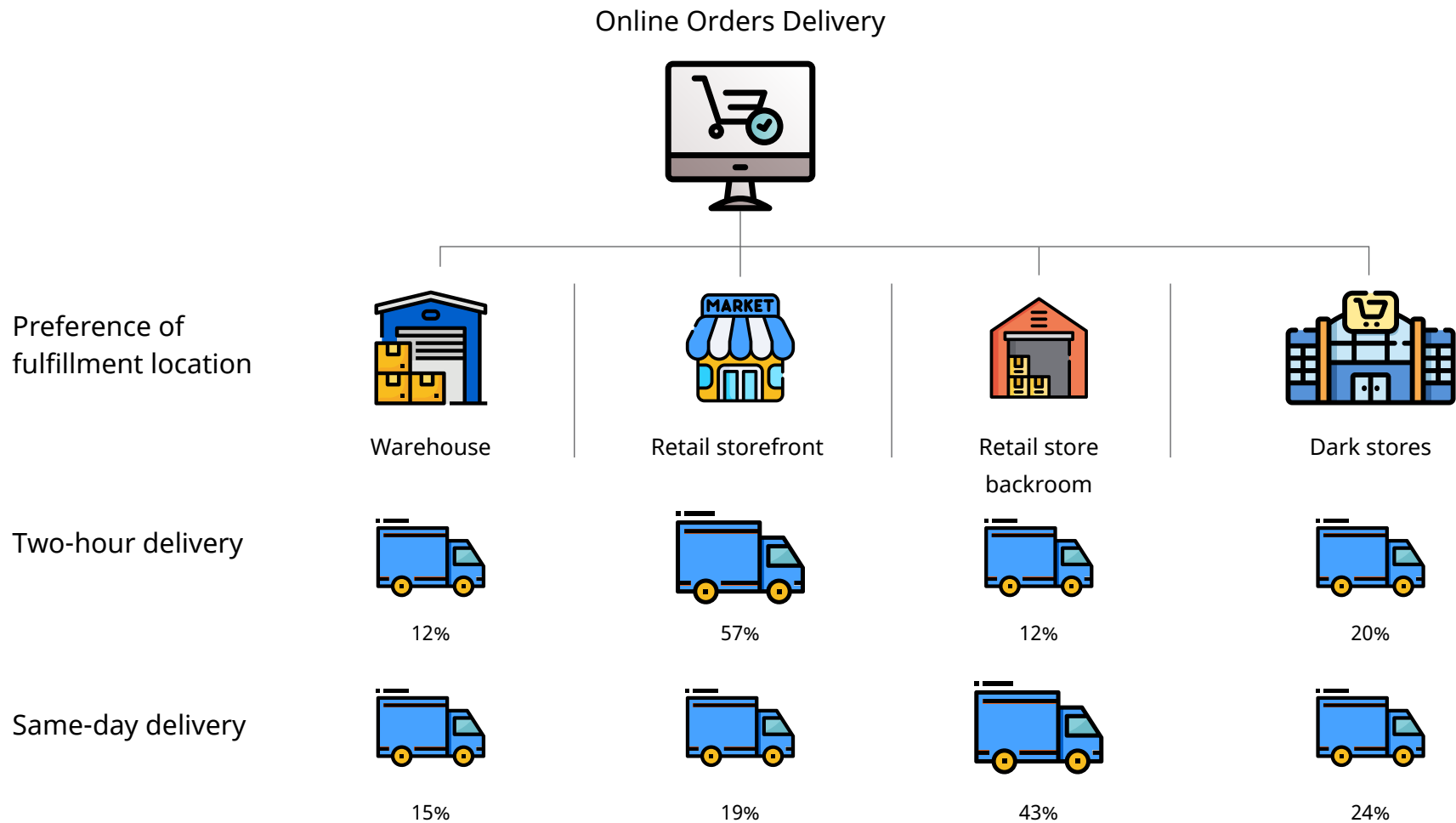
Developing a dense network of warehouses to enable same-day delivery can be a challenge.

Amazon's German delivery network



Multiple fulfillment locations for same-day and two-hour delivery

It is difficult to provide fast delivery without causing inconvenience to in-store customers. The speed of delivery determines the model to make fulfillments. Storefront is the most preferred option for [two-hour deliveries](#). But for same-day deliveries, the backroom of the store is the most popular route.



Developing countries leapfrogging in same-day delivery

Most retailers in less developed countries do not provide same-day delivery services. Only rapidly growing E-commerce players like Alibaba, JD, Dafiti, Submarino, Tencent, and so on invest in these services.

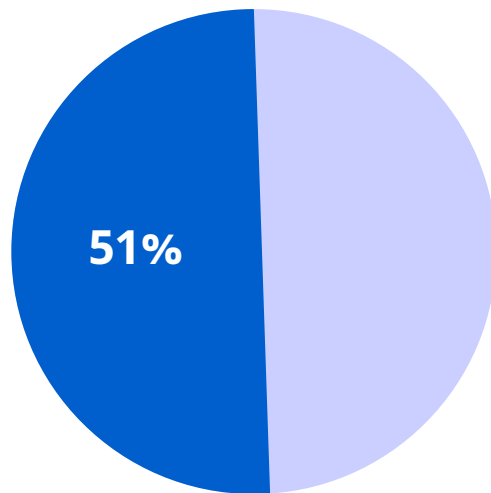
Some E-commerce players invest a massive amount of money into their own logistics infrastructure. The online players in less developed countries are adding warehouse fulfillment and last-mile abilities into their operations.



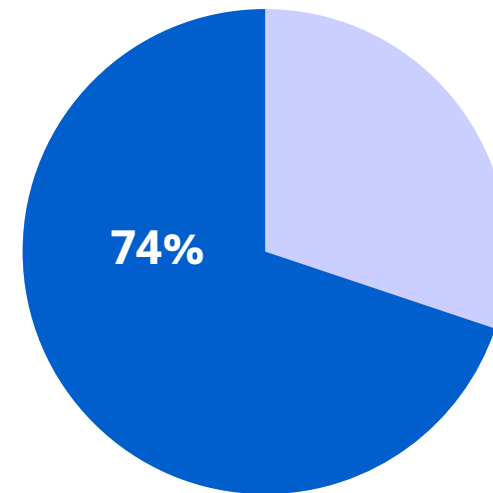
Example: Alibaba, a Chinese E-commerce platform, plans to enable same-day delivery in over 2000 Chinese cities. JD, Alibaba's primary competitor, offers same-day delivery with its own logistics infrastructure in more than 25 cities.

Retailers in developing countries are looking to introduce same-day deliveries in big cities. Dafiti in Sao Paulo is an example.

Same-day deliveries in Southeast Asia



Customers Preferring Same Day Delivery Services*



Customers Who Are Willing to Pay More for Same Day Delivery*

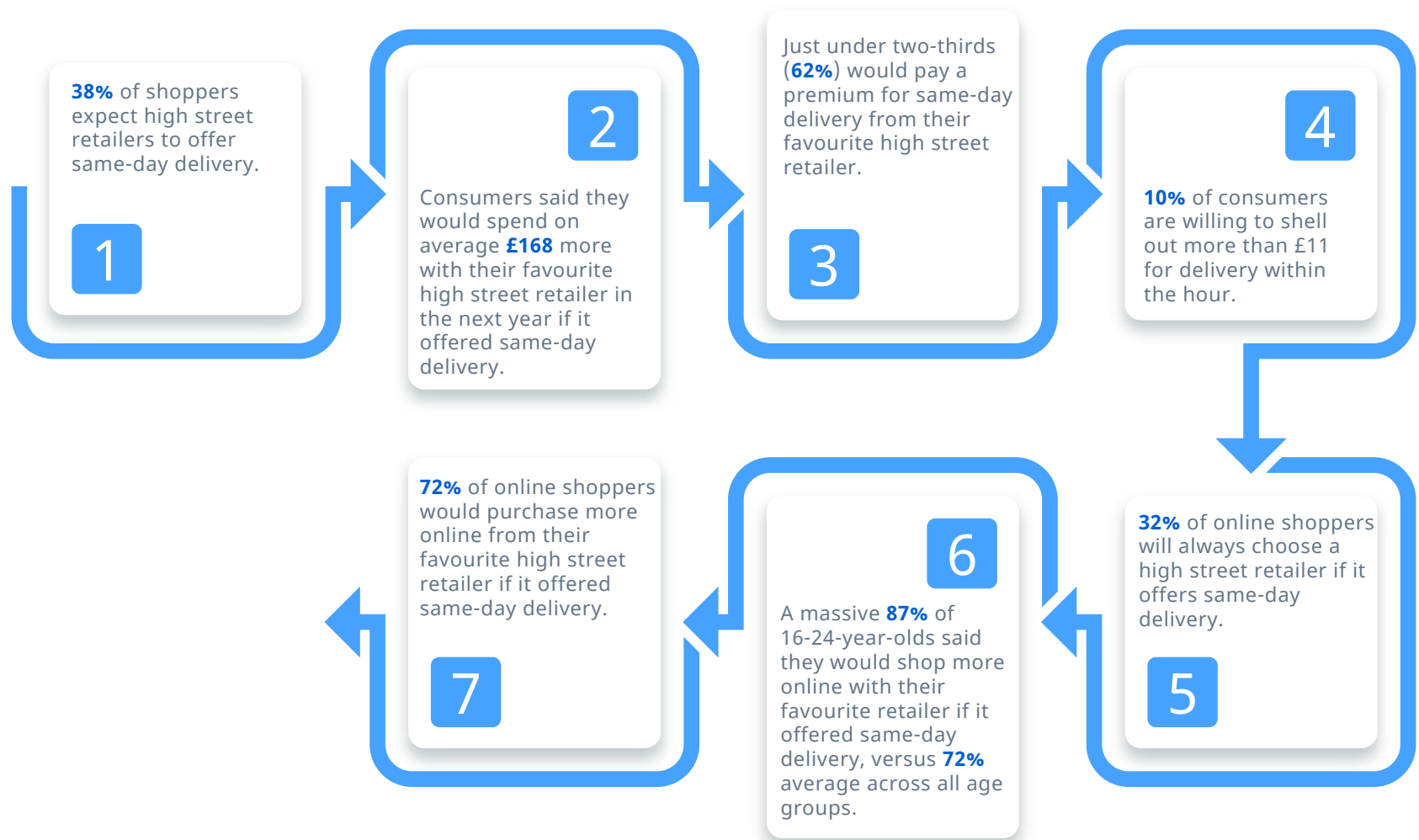
Growing appetite for same-day delivery among UK consumers



Brick and mortar high street shops have been struggling to compete with their online counterparts.

High street retailers have a massive advantage as they can easily provide same-day deliveries as their retail outlets are located next to customers. A quicker and convenient same-day delivery service opens up new revenue opportunities.

The appetite of same-day delivery among UK consumers (Source: On-demand delivery: the untapped goldmine, Stuart, September 2016)



Expected Delivery Window for future same-day orders (Source: The Future of Fulfillment Vision Study, Zebra technologies, 2018)

Percentage of people	Delivery Window expectations
32%	2 hours or less
44%	3 - 4 hours
24%	5+ hours

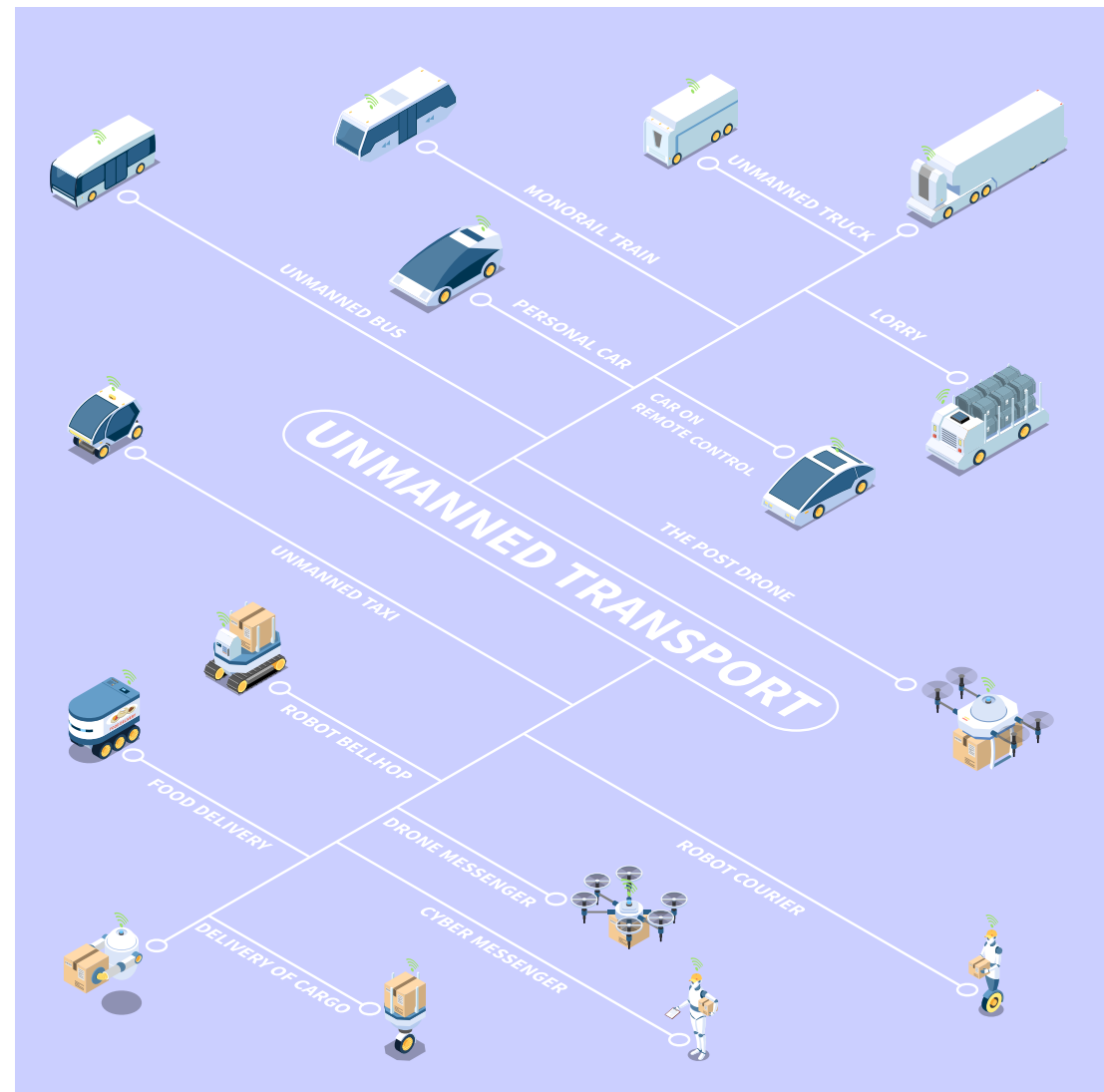
Even developed economies like the US, the UK, and the European nations, have driver shortages. This has pushed logistics businesses to bank on innovation. The future of same-day delivery is automated warehouses, drones, and driverless vehicles. These innovations are presently in the experimental stage.

Same-day delivery has pushed logistics businesses to discover new opportunities and potential investments. This pandemic has ensured that the logistics industry focuses on efficiency, consumer experience, and cost-effectiveness in the last-mile.

Future of same-day delivery

Logistics businesses are aiming to achieve higher levels of efficiency through extended service hours at a lower cost. Technology innovations have the potential to shorten the average delivery time to just a few minutes.

The future of same-day delivery is going to be a blend of localized supply chain networks with innovative technologies like automated warehouses, driverless vehicles, and drones.



Automated Warehouses

When asked about current robotics use and whether they will evaluate robotics during the next 24 months, 16% said that they currently use robotics, while 15% are evaluating robotics, for a total of 31% now either using or considering robotics. That's up from last year, when 9% said they use robotics and 13% were considering robotics.- 2018, Warehouse Distribution Center Equipment Survey

An item is picked from the inventory once a warehouse receives an order. Then, the product is taken to a parking station and then shipped. It looks simple, but logistics experts state that this activity means that an item has to travel 1.5 million square feet, which is equal to 26 football fields, before getting shipped.

Setting up automated warehouses can make this process efficient by reducing the downtime. As automated warehouses become the norm, same-day delivery can become common too.

Automated warehousing systems can help achieve low prices, large selection, convenience, and fast delivery.



Automated Vehicles or Driverless Vehicles



A new study conducted by research firm Strategy Analytics and commissioned by Intel predicts that driverless vehicles will constitute a \$7 trillion economic value by 2050, with \$4 trillion from consumer use and another \$3 trillion from business use.

Most countries are facing a shortage of truck drivers with a simultaneous rise in volume of orders. Logistics experts are of the view that by 2025, companies will be forced to employ autonomous and driverless vehicles.

As goods start getting delivered to homes directly through autonomous vehicles, it will impact in-store purchases and also convert brick-and-mortar stores into experience centres and fulfilment nodes. It will turn drivers into customer executives and supply chain experts.

Drone delivery adding a new dimension to same-day delivery

75 percent of all recipients in the US live in cities with less than 50,000 inhabitants – and all other delivery models are far too expensive or not feasible. So drones may be the only solution to offer same-day and time-window services in rural areas- Parcel Delivery, The future of last mile, Mckinsey, Sep 2016.

Today, if we run out of some product we take a vehicle, visit a nearby store and purchase it. The advent of drones can change this. A quick visit to a website and a few clicks of the mouse can bring the desired products to home.

To provide a 30-minute or less delivery promise through drones, a logistics business requires warehouse and dispatch centers sprinkled all over the country. There are high chances for hyperlocal and suburban retail outlets to function as drone delivery dispatch centers.



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