



UK DOMESTIC B2B & B2C PARCELS BENCHMARKING

2021 REPORT

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TRIANGLE
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UK PARCELS DISTRIBUTION SURVEY PROGRAMME 2021

BACKGROUND

For almost three decades, Triangle's UK Domestic Parcels Distribution Survey programme has been the industry standard benchmarking survey for the UK express parcels industry.

Although keeping a consistent format and content, the surveys change in line with developments in the marketplace, and 2021 will see the 23rd year of Triangle's UK Domestic Parcels Distribution Survey.

EVERY YEAR THE CONTENTS OF THESE SURVEYS REFLECT DEVELOPMENTS IN THE MARKETPLACE AND THIS YEAR THE COVID PANDEMIC SHOULD PROVE TO BE A MAJOR DISRUPTIVE FACTOR. THE SURVEY ALSO ALLOWS FOR CONFIDENTIAL QUESTIONS FROM PROGRAMME SPONSORS... PROVIDING BESPOKE RESEARCH AT MULTI-CLIENT PRICES.

Inevitably, this year's report, results and perceptions will be marked by the unprecedented events of the last 18 months and it will be interesting how the different carriers performed under pressure and how well and quickly they were able to adapt to the new 'normal' of contactless delivery, social distancing, online shopping, amongst others.

SECTOR ALIGNMENT

Over recent years, Triangle's surveys have identified an increasing alignment of the business and residential delivery sectors, with B2B and B2C shippers perceiving little difference between carrier performance. Carriers also now offer the same delivery features and service levels regardless of whether it is a business or consumer recipient. Triangle started offering a combined report which consolidated the results of the B2B and B2C sector surveys, in order to represent the UK domestic parcels delivery industry as a whole. However for the third year in a row Triangle will run a single interview programme focusing on overall performance and shipper perceptions and not segregating by segment.

As previously, the survey focuses on regular parcels shippers within the UK, tracking changes in service usage and customer perceptions of the leading carriers and their performance levels.

For many senior executives in the express industry the results of Triangle's core survey set independent KPIs for internal management initiatives and provide invaluable competitor benchmark comparisons which can work alongside in-house research data, such as carriers' own customer satisfaction surveys, for example.

KEY BENEFITS

Triangle's syndicated approach and unique survey structure provides very cost-effective benefits for subscribers:

- » As a broad industry survey, it offers a view of how competitors are performing and how the market is changing in terms of shipper needs.
- » Unlike an in-house customer feedback survey, Triangle's study covers all the main carriers in the domestic market and is totally impartial.
- » Five years of trends provide insights into carrier efforts to redress weaknesses and improve key performance areas over time.
- » The inclusion of confidential questions asked across all 600 shippers offers a single-client benefit at a multi-client price, enabling the subscriber to ask the marketplace their own questions about specific topics of interest to product or marketing plans.
- » Triangle's flexible surveying approach also allows additional interviews to be included, with tailored reporting to suit individual subscriber needs.

STUDY SCOPE

For 2021, Triangle is using the following survey structure and deliverables:

- » 600 interviews with shippers sending a minimum of 50 parcels a month, either to business or residential addresses
- » Based on quotas by primary carrier used (see later)
- » An interview quota for B2C deliveries, resulting in approximately 365 interviews (60% of the total survey)
- » Additional interviews are available for any carrier quota at a separate cost and reported confidentially
- » New challenging topics and questions (see later)
- » Reporting combines performance ratings for each carrier regardless of B2B or B2C strengths, and feature:
 - » A tailored summary highlighting key points for the subscriber
 - » 2-3 unique subscriber's own confidential questions
 - » Executive presentations provided as an option and charged separately.

REPORT

METHODOLOGY

The surveys are based on minimum/maximum quota ranges for Primary Carrier usage (i.e. carrier used most often), in order to guarantee robust results for each of the main carriers. A rating for the next most often used carrier (Secondary Carrier) is also captured, but no quota by carrier is set for them, i.e. these are random. Overall quotas aim to represent each carrier's proportionate market share.

The surveys are conducted via in depth telephone interviews held in accordance with the Market Research Society Code of Conduct. The core sample is selected from a large database of known users of parcel distribution services, combining previous respondents and refreshed by newly qualified and recruited respondents each year.

Triangle's interviewers are experienced market researchers who have been involved with these particular studies for many years, supported by online software. The fieldwork for the 2021 survey will be conducted in one tranche over two to three months.



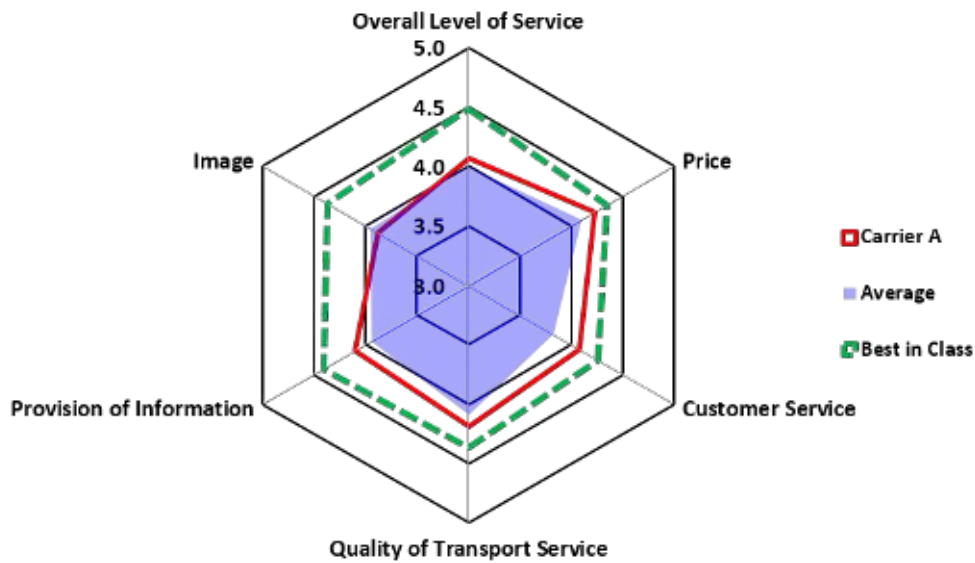
SURVEY SIZES & QUOTAS BY CARRIER

- » 600 Primary carrier users, with around 700 benchmark ratings when secondary carrier usage is included. (Secondary carrier usage levels are based on the 2021 survey results.)
- » A B2C-specific option is available, based on 365 Primary carrier users. There is a total of about 420 benchmark ratings when secondary carrier usage is included.

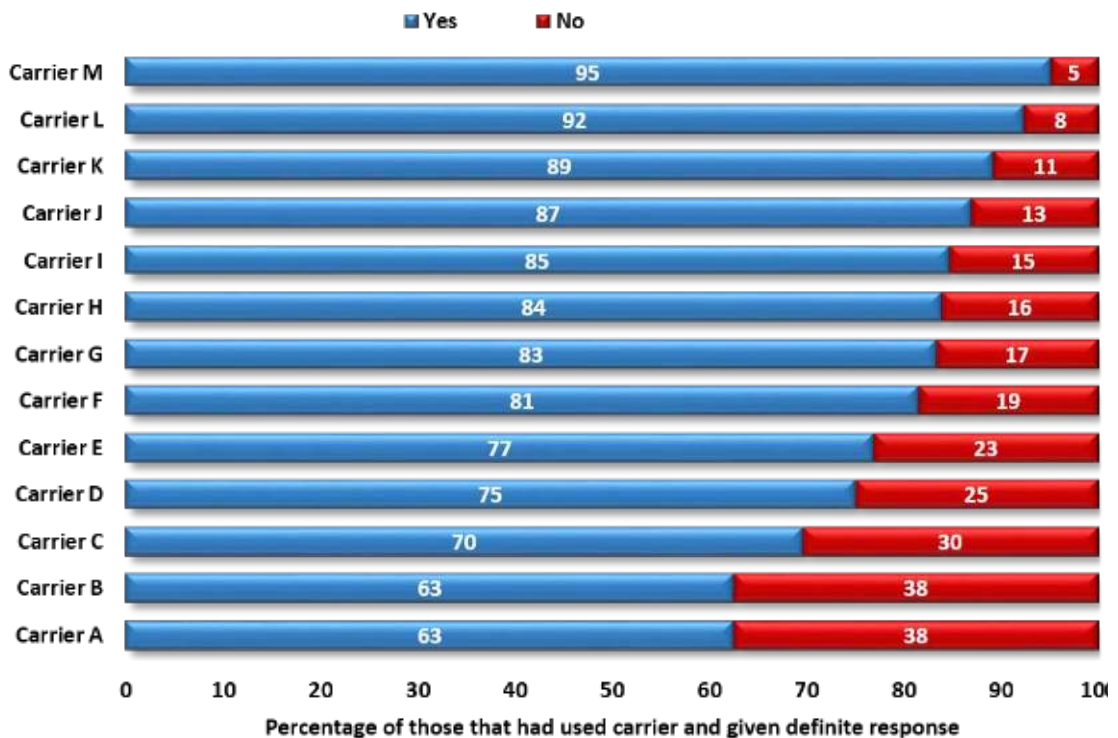
2021 ESTIMATED NO. OF TOTAL RATINGS				
	Estimated total no of interviews of Primary Carrier users.	Estimated % of B2C interviews	Estimated secondary carrier usage	Total number of ratings
Amazon (FBA)	20	100%	7%	21
APC Overnight	25	60%	8%	27
DHL Parcel (UK Mail)	50	80%	16%	58
DPD	70	64%	19%	83
DPD Local	25	40%	15%	29
DX Freight	25	40%	7%	27
FedEx	50	60%	19%	60
Hermes	30	100%	11%	33
Parcelforce Worldwide	70	57%	13%	79
Royal Mail	70	57%	21%	85
TNT Express	50	30%	27%	64
Tuffnells	15	0%	17%	18
UPS	50	70%	20%	60
Yodel	50	70%	3%	52
TARGET TOTAL	600	59%	15%	694

CHART SAMPLES

Below are few chart samples from our most recent report in 2021.



ALTERNATIVE DELIVERY LOCATIONS



SURVEY CONTENTS

The core tracking elements included in the questionnaires are maintained so as to ensure consistent trend data.



THE MAIN CONTENT FOR EACH SECTOR REPORT IS AS FOLLOWS

- » Shipping profiles (average volumes, weights, products sent)
- » Carrier usage (most often used, others used in last 12 months, lapsed usage)
- » Carrier awareness (for carriers not used, spontaneous and prompted)
- » Importance of carrier selection criteria
- » Carrier Performance Ratings on Overall level of service plus five core attributes such as Price, Customer Service, On Time Delivery etc. ^(a)
- » Carrier Descriptors (Yes/No assessments) on 12-16 key statements ^(a)
- » Likelihood of recommending the primary carrier used (which provides a Net Promoter Index Benchmark for the industry) ^(b)
- » Total spend
- » Service level usage
- » Alternative delivery address and returns options offered

(a) For the top two carriers (most often used and second most often used in volume terms). Four statements are B2C-specific

(b) Based on the Net Promoter scoring approach.



NEW QUESTIONS IN 2021

Surely one key topic on everyone's mind is how the pandemic has affected UK parcel carriers and their ability and efficiency to rise to the occasion.

CONFIDENTIAL QUESTIONS

In addition, survey sponsors can add two to three confidential questions of their own to the questionnaire, which are then included within the individual confidential reporting pack.

PRICE, REPORTING & PLANNED AVAILABILITY

UK Domestic B2B and B2C Parcels Distribution Survey Report 2021: **£20k**

UK Domestic B2C Parcels Distribution Survey Report 2021: **£12k**

Selected Carrier View (results of hand picked carriers only): **£2.5k (per carrier)**

Omnibus Questions (add your own questions during the interview process): **£320 per question**

ADDITIONAL OPTIONS

- » Additional interviews/supplemental reporting at a cost to be agreed depending on sample size and additional reporting requirements, e.g. bespoke segmentation.
- » Executive presentations available, with costs depending on bespoke content and travel requirements.

All prices exclude VAT.

REPORTING

- » Subscribers receive a reporting package comprising:
 - » Executive Summary
 - » Sample Base Description
 - » Main Findings: Results and Analysis – with over 70 charts per report
 - » Trend Data, last 5 years for the B2B and B2C Surveys combined (or purely for B2C in the case of the B2C-only option)
 - » Confidential Question Results
 - » Carrier Service Profiles

DELIVERY TIMETABLE

Both reports will become available from October 2021.

THE TRIANGLE TEAM

Triangle's specialist team draws together decades of industry experience from across the postal, express and logistics industry.



Helen Daniels, Head of Research at Triangle, has over 35 years' experience in business research and consulting, half of which has been focussed on the mail, parcels and freight world.



Agustin Maril, Senior Research Executive, is the day to day project manager and has been with Triangle since 2012.



Neil Jackson, CEO, supports quality control aspects of the programme.



TRIANGLE SERVICES INCLUDE:

- » Management consultancy
- » Market research
- » Conferences and exhibitions
- » Specialist publishing



PUBLISHED RESEARCH

- » UK Express Carriers Digest
- » UK Express Pallet Networks Digest
- » UK International Mail & Parcels Digest
- » Latin America Postal and Express Digest

FURTHER INFORMATION

For further information, please contact Agustin Maril, Senior Research Executive, via email: agustin.maril@triangle.eu.com or by calling: **+44 (0)1628 642 910**

ABOUT TRIANGLE

Established over 30 years ago, Triangle is an independent high quality provider of a range of value added specialist services to the global mail and express industries. These include strategic consultancy, market research, publishing and high-level conferences.

Triangle publishes two leading industry publications: the quarterly Mail & Express Review and the daily Post & Parcel electronic newsletter, which are read by mail and express executives worldwide.

Annual events include the World Mail & Express conference series (Europe, Americas and Asia), as well as the prestigious World Post & Parcel Awards.

Find out more at www.triangle.eu.com



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