2018 State of Last Mile Service & Delivery
Behavior and Expectations Keep Changing

- 86% of consumers order products online
- 45% have ordered groceries online
- 95% find real-time service/delivery tools useful
- 72% raised their expectations for food/retail delivery this year
- 30% have missed a scheduled home service appointment

Source | USA Consumer Research by Harris Interactive on behalf of Glympse
86% of US consumers shop online

- **51% Buy Retail Online**: Females 55+ are more likely to buy retail goods online.
- **9% Buy Food Online**: Males 18-34 are more likely to buy food online.
- **27% Buy Both Online**: Only 14% buy neither food nor retail online.

Base: All respondents (1010)

© 2018 Glympse
On-demand products and services require on-demand visibility
Almost half of consumers have ordered groceries online

Proportion who have ordered groceries online

45%

Base: All respondents who purchase either retail or food items online (882)

Primary reasons for reordering:
- Delivery cost
- On-time delivery

Factors that lead to ordering again

- Cost of delivery: 62%
- On time delivery: 59%
- Convenient delivery times: 52%
- Flexible scheduling of pickup/delivery: 51%
- Convenient curbside pickup times: 40%
- Other: 2%

Base: All respondents who have previously ordered groceries online (391)

© 2018 Glympse
72% say their expectations about food and retail deliveries have changed in the last 12 months

Some are even willing to pay more for companies that can meet expectations for greater flexibility when ordering:

- 68% of 18-34 year-olds to receive their order faster
- 55% of men for more choices and multiple delivery/pickup options
- 63% of men for personal recommendations
- 60% of men to be able to make last minute changes

Base: All respondents whose expectations have changed (629)
Real-time order visibility and fast delivery are their top priorities.

- To be able to track my order online and in real-time: 43%
- To receive my order faster: 35%
- More choices and multiple delivery/pickup options when ordering online: 33%
- Frequent updates about the progress of my order while it is on its way: 28%
- To receive personalized recommendations based on my interests: 20%
- To be able to make changes up until final packaging: 19%
- My expectations have not changed: 28%

Has your expectation around how retail & food deliveries are made changed in the last 12 months?

Base: All respondents who purchase either retail or food items online (882)
95% of consumers consider tracking tools useful

Yet most aren’t willing to pay extra for companies to deliver on this new expectation

Delivery trackers are table stakes
30% of consumers have missed a previously scheduled service appointment.

At $200 per truck roll, can you afford that?
Consumers just want communication and flexibility – they are ready and waiting for updates.

Thinking of the most recent time that you missed an in-home service appointment, what was the reason why you missed the appointment?

- Technician did not show up on time: 23%
- Something urgent with work or family came up: 21%
- I forgot about the appointment: 18%
- The company didn’t communicate to me when I should expect someone to arrive: 16%
- I couldn’t figure out how to cancel or reschedule the appointment: 13%
- I didn’t trust the person at my door: 8%

Base: All respondents who have previously missed an appointment (304)
People are sick and tired of waiting and wondering

Importance of factors regarding in-home service appointments

Please rank the following in order of importance when it comes to in-home service appointments

<table>
<thead>
<tr>
<th>NET rank 1st &amp; 2nd</th>
<th>60%</th>
<th>37%</th>
<th>29%</th>
<th>27%</th>
<th>25%</th>
<th>20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>6th</td>
<td>43%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td></td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td>17%</td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>13%</td>
<td></td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>10%</td>
<td>15%</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st</td>
<td>8%</td>
<td>11%</td>
<td>18%</td>
<td>16%</td>
<td>20%</td>
<td>27%</td>
</tr>
</tbody>
</table>

- Arriving on-time as scheduled
- Communication in changes regarding time/status of appointment
- Appointment reminders
- Ability to cancel or reschedule at any time
- Professional manner/appearance
- Information about the representative in advance

Base: All respondents (1010)

© 2018 Glympse
They want answers, now!

Preferred method for seeking answers to questions about upcoming deliveries/service appointments

Thinking about when you are expecting a delivery or service appointment, please rank, in order of preference, how you seek answers.

<table>
<thead>
<tr>
<th>NET rank 1st &amp; 2nd</th>
<th>58%</th>
<th>1st</th>
<th>12% 8%</th>
<th>2nd</th>
<th>22%</th>
<th>3rd</th>
<th>18% 17%</th>
<th>4th</th>
<th>18% 17%</th>
<th>5th</th>
<th>18% 16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>BY EMAIL</td>
<td>29%</td>
<td>23%</td>
<td>30%</td>
<td>16%</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BY TEXT</td>
<td>29%</td>
<td>26%</td>
<td>18%</td>
<td>19%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BY PHONE</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BY ONLINE PORTAL/PERSONALIZED LINK</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
<td>25%</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BY MOBILE APP</td>
<td>18%</td>
<td>11%</td>
<td>18%</td>
<td>22%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
55% say their expectations about home services and deliveries have changed in the last 12 months

Base: All respondents who purchase items online (882)
3 Things Matter

- The representative arrives on-time
- Ability to track the representative online and in real-time
- Flexibility to change the date or time of a scheduled appointment

How has your expectation about in-home service appointments, like cable, plumbing/heating and furniture delivery changed in the last 12 months?

- My representative to show up on time in the window of time given to me: 30%
- To track online and in real-time when my representative will arrive to my house: 24%
- The ability to control and change the date and/or time of my appointment at any time: 22%
- To receive my representative’s name and photo in advance so I know who is coming to my house: 20%
- The company to ask for feedback about my experience after the service call: 16%
- The ability to add more services to my order once my representative is on-site: 15%
- My expectations have not changed: 45%

© 2018 Glympse

Base: All respondents who purchase either retail or food items online (882)
Higher expectations extend beyond the home – all the way to connected autos

Customers would like to:

- Get an ETA and photo for roadside assistance representatives
- Send an ETA to friends, family or service representatives
- Get an ETA from friends, family or service/delivery representatives
- Order food to be delivered to their home or picked up from a restaurant

**Thinking about current and future cars/vehicles, which of the following capabilities would you like to see in your car or vehicle?**

<table>
<thead>
<tr>
<th>Capability</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receive an estimated time of arrival and a photo of your roadside assistance technician</td>
<td>36%</td>
</tr>
<tr>
<td>Send an alert to your friends, family, colleagues or service/delivery representatives with where you are and when you will arrive to them</td>
<td>28%</td>
</tr>
<tr>
<td>Receive an alert from your friends, family, colleagues or service/delivery representatives with their estimated time of arrival</td>
<td>27%</td>
</tr>
<tr>
<td>Ability to order food for delivery to your home or pick-up at the restaurant</td>
<td>26%</td>
</tr>
<tr>
<td>Ability to place your favorite order automatically</td>
<td>23%</td>
</tr>
<tr>
<td>Ability to safely unlock the trunk to accept a package delivery without you needing to be present</td>
<td>23%</td>
</tr>
<tr>
<td>Receive an alert from nearby retailers and restaurants with relevant, personalized offers</td>
<td>23%</td>
</tr>
<tr>
<td>Ability to order groceries</td>
<td>21%</td>
</tr>
<tr>
<td>None of these</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: All respondents who drive a car or other vehicle (n=883)
Real-time insight is now table stakes

It’s time to raise the stakes
2018 State of Last Mile Service & Delivery
Harris Interactive conducted research for Glympse to look into consumer expectations with regards to deliveries, appointments and online purchases.

**Methodology:**
- Online interviews via Harris 24
- **Sample size:** n=1010
- **Fieldwork dates:** 10th May – 17th May 2018
- **Sample:** Respondents aged 18+ from the United States

**Significance testing:**
Significant differences between groups has been tested at 95% confidence level, with any groups that outperform all others within its category shown as in the below key:

- **Gender**
  - *F* Where **Females** score significantly higher than Males
  - *M* Where **Males** score significantly higher than Females

- **Age**
  - *18-34* Where 18-34 year olds...
  - *35-54* Where 35-54 year olds...
  - *55+* Where 55+ year olds...
  - ... score significantly higher than all other age groups