



“David vs. Goliath” Engage Anywhere, Sell Anywhere & Fulfil Anywhere

Eduard Lazar, Head of Partner Services, On the dot



Courier & Postal Services Forum 2019



CitySprintGroup



Same day delivery and
specialist services



Retail delivery
specialists

Largest UK Same day Delivery company (26% market share)

National reach with local support

CitySprint are the UK's leading same day distribution company, delivering flexible, reliable, innovative and technology-led courier and logistics services

65+ partner retailers signed with On the dot



Ranging from local retailers to large-scale enterprise customers

40+ sites across the UK



With the ability to reach 88% of the UK population within 60 minutes

Over 15 million critical deliveries made



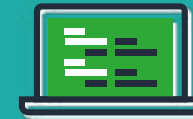
Achieving a >99% success rate of items delivered first time

5000+ DBS checked and GPS-enabled couriers



With the largest courier pushbike fleet in London (and 120+ green vehicles)

15,000 jobs completed per day



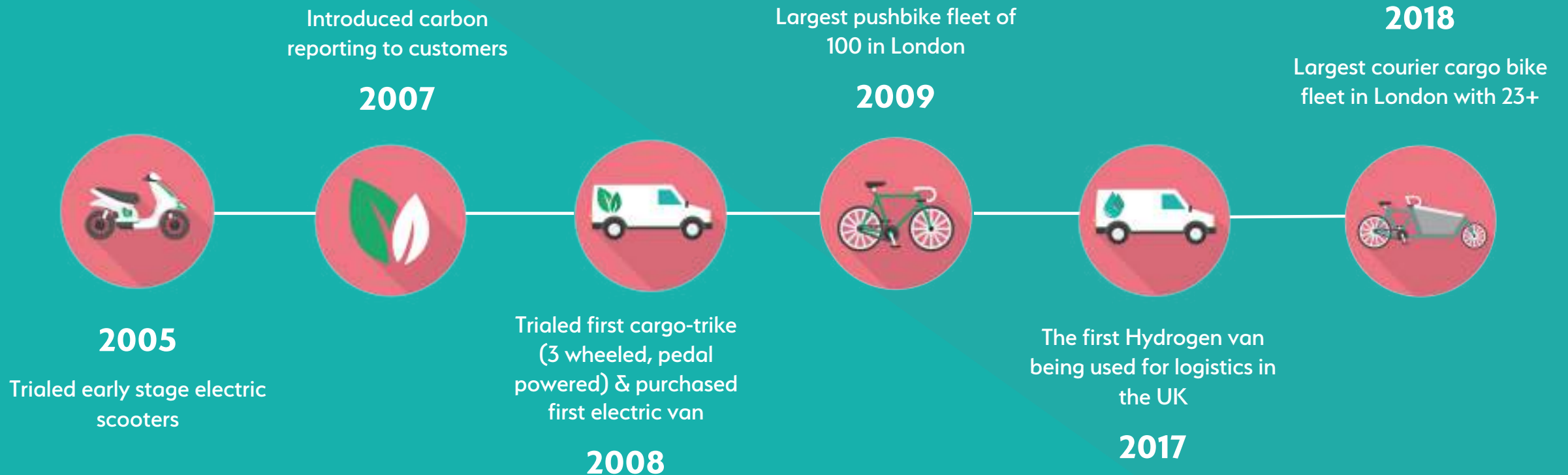
Supported by 880+ staff UK-wide

A safe, compliant and award-winning delivery service



Supported by our in-house fleet management and compliance teams

Green Fleet - Early adopters



Green Fleet - Retrospective

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2.1mn

Deliveries made since 2008



50%

Faster than vans during peak traffic hours



100+

Pushbikes in our fleet



20min

Minutes or less collection time with our cargo bikes

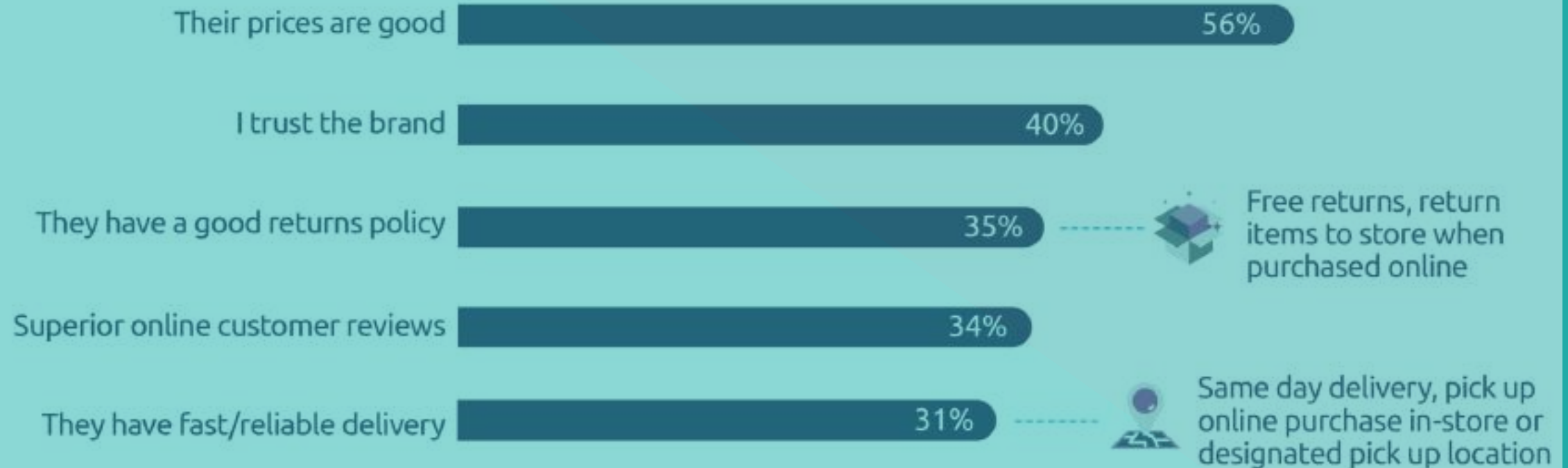
We estimate that over the course of 2019 our cargo bikes will cover over 200,000 miles (**like riding around the world 8 times**). The use of the cargo bikes will reduce our emissions by an estimated 79 tonnes of CO2 emissions.

One step ahead



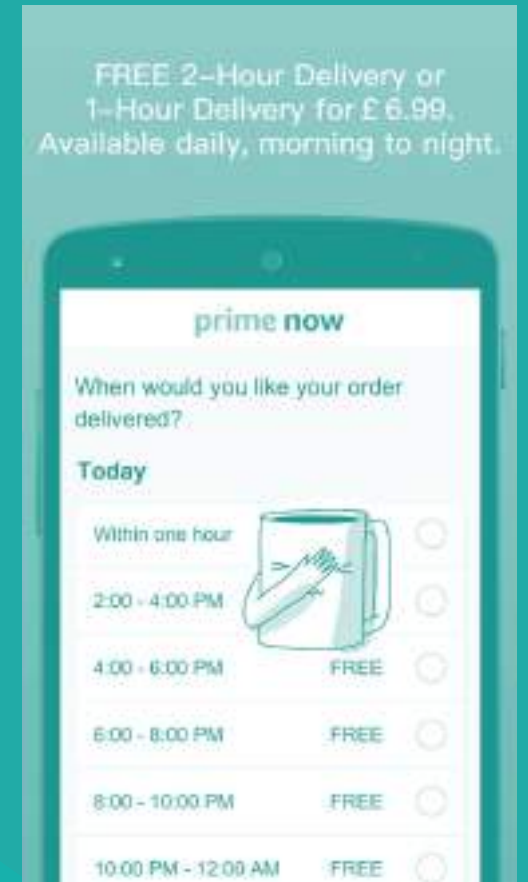
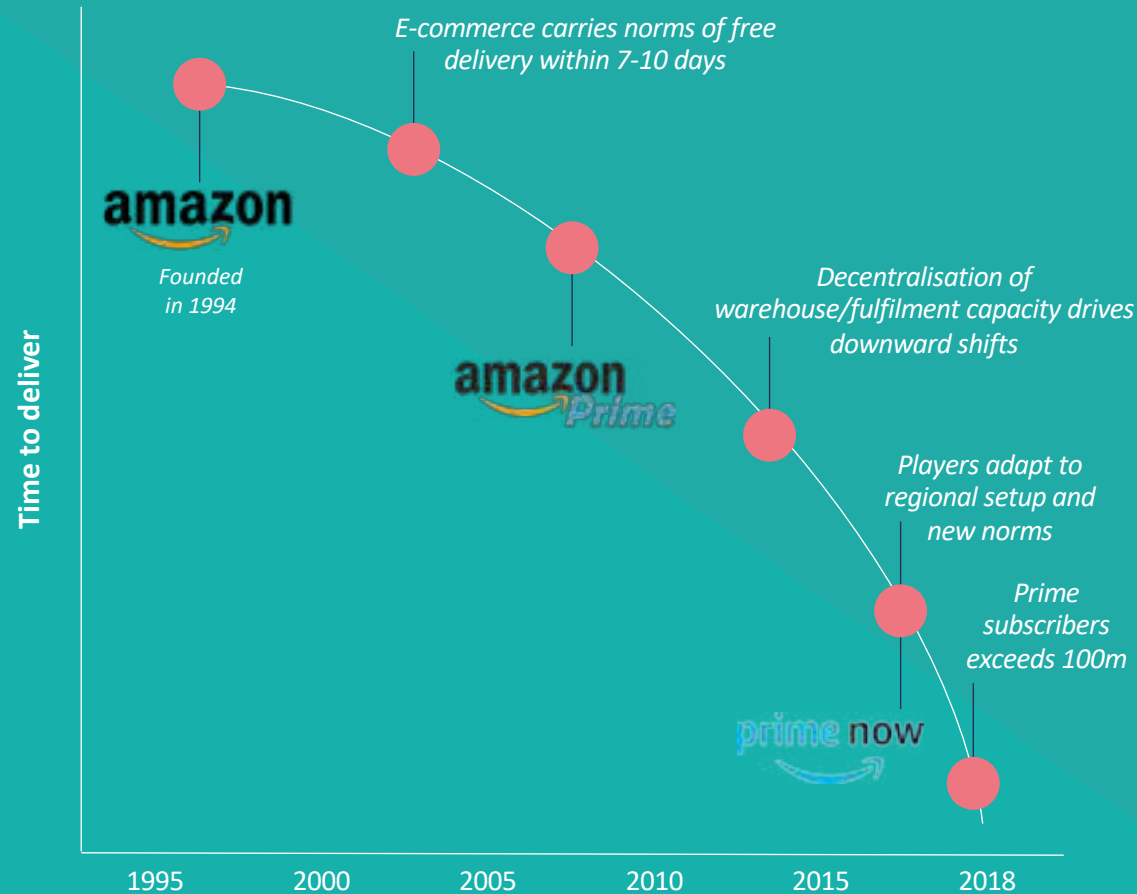
Omni-channel fulfilment valued as a customer experience differentiator

Top 5 reasons why consumers shop online with their favourite retailer



“Goliath” set the competition bar

- Amazon setting consumer expectations
- Prime Now members spend twice as much as non-Prime members



“David” fighting back by increasing customer expectations of convenience

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“We are charging for delivery and customers are paying for it. We’re picking products in stores that are profitable because the stores are already profitable – our fixed overheads are covered.”

“By end of 2019 40% , by end of 2020 80% of USA will be covered by same day delivery across Walmart store network.”

-Marc Lore, CEO, Walmart.com

Walmart is testing its own network of independent delivery drivers as it aims to offer home grocery delivery to 100 metro areas by the end of the year. The retail giant said Wednesday it will begin using Spark Delivery, a crowd-sourced delivery-driver network

06.09.2018

Walmart 



ALDI continues growth momentum with national Instacart rollout - retailer launching e-commerce and same-day online delivery solutions coast to coast

18.09.18

Target Corporation is trying all means to gain lead in the grocery delivery race, aggressive expansion of same-day delivery is one of the ways

25.09.18

 Target

Sam's Club expands same-day delivery with Instacart to make holiday shopping faster and easier

18.10.18

 Sam's Club

As part of an ongoing \$1.2 billion supply-chain upgrade, Home Depot has started same-day delivery across the U.S. to help it stay relevant with consumers' need-it-yesterday mentality

26.09.18



On the dot delivery



On-demand delivery

Collection and delivery within 2 hours.



Advanced scheduling

Schedule deliveries when you want.



Customised API & solution

Plug and play



Co-branded bookings & notifications

Plug and play



Store to door tracking

Live SMS or email notifications at each milestone.



Flexible & agile fleet

We have a range of bikes, cars & vans to ensure we have the best courier for the job.



Live Customer Support

Operating 7 days a week and here to help on live chat, phone or email.



Extended hours of operation

7 days a week am to pm.

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Strategic insight



The Same Day market is projected to grow >75% pa over the next 4 years*



Fashion gifting and electronics were >50% of same day deliveries in 2017



>50% of retailers are projected to offer same day by 2023 (vs. 20% today)



Argos grew same day delivery from zero to >3m deliveries per year in 2 years



On-Demand Grocery projected to be 10x bigger by 2023



Fashion is 24% of online spend but 45% of same day deliveries (excluding Amazon and Argos)



Strategic insight



Of consumers who abandoned an online shopping basket 33% said “the delivery would take too many days to come”, 26% said “I couldn’t select a convenient time on the delivery day”



37% of retailers were able to reduce cart abandonment with better shipping choice



79% of consumers will switch retailers for same day delivery when needed

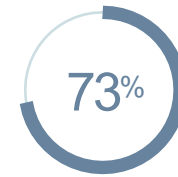


54% of shoppers will increase basket size for free hyperlocal delivery



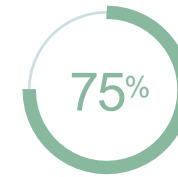
Reducing same day delivery price from £8 to £5 would double customer willingness to pay

ECOMMERCE DELIVERY TRENDS: CONSUMER PREFERENCES



73%

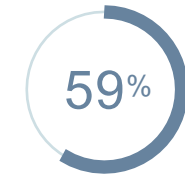
UK



75%

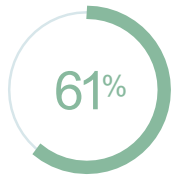
GLOBAL

of consumers have purchased more items to take advantage of a minimum spend 'free delivery' option.



59%

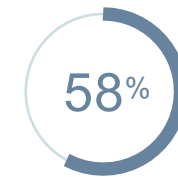
UK



61%

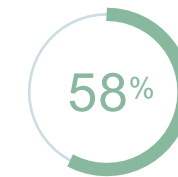
GLOBAL

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



58%

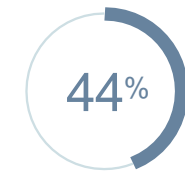
UK



58%

GLOBAL

of consumers chose to purchase goods from one online provider over another because they provided more delivery options.



44%

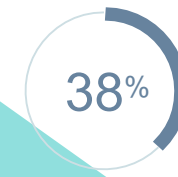
UK



55%

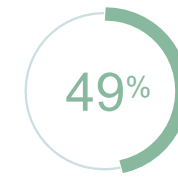
GLOBAL

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



38%

UK



49%

GLOBAL

of consumers would prioritise shopping with one online provider over another if it offered a loyalty program featuring free next day delivery.

Our auto consolidation & allocation



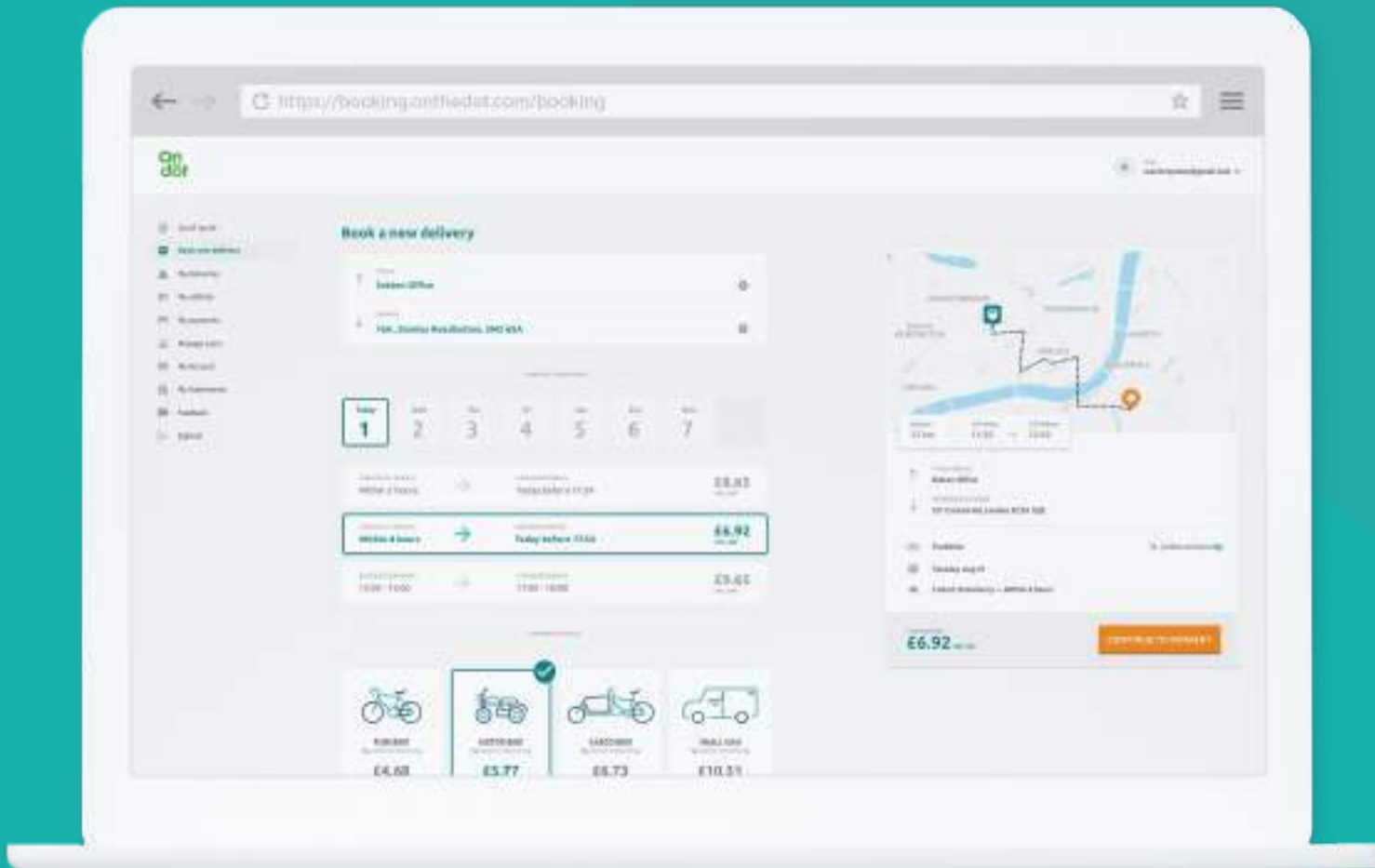
- Batch planning too rigid
- Computing is now ubiquitous in cloud
- No pre-conceived delivery strategy
- Compute optimal solution on the fly
- Machine Learning makes this efficient
- Delivery strategies emerge in real-time
- Best overall efficiency for all parties
- Reduce time for delivery and cost
- Improve courier utilisation

Top 3 things our customers love

- ✓ Easy to use platform
- ✓ Advanced scheduling up to 7 days in advance (soon to be up to a year)
- ✓ Live notifications of delivery en-route
- ✓ Rich Applications to manage every booking



<https://booking.onthedot.com>



On the dot APIs

Get it now



A set of APIs combined to enable you to offer as ASAP delivery service within an agreed delivery window SLA

Scheduled delivery



A set of APIs tuned for conveniently scheduling delivery windows later same day or in the future

Return to Depot



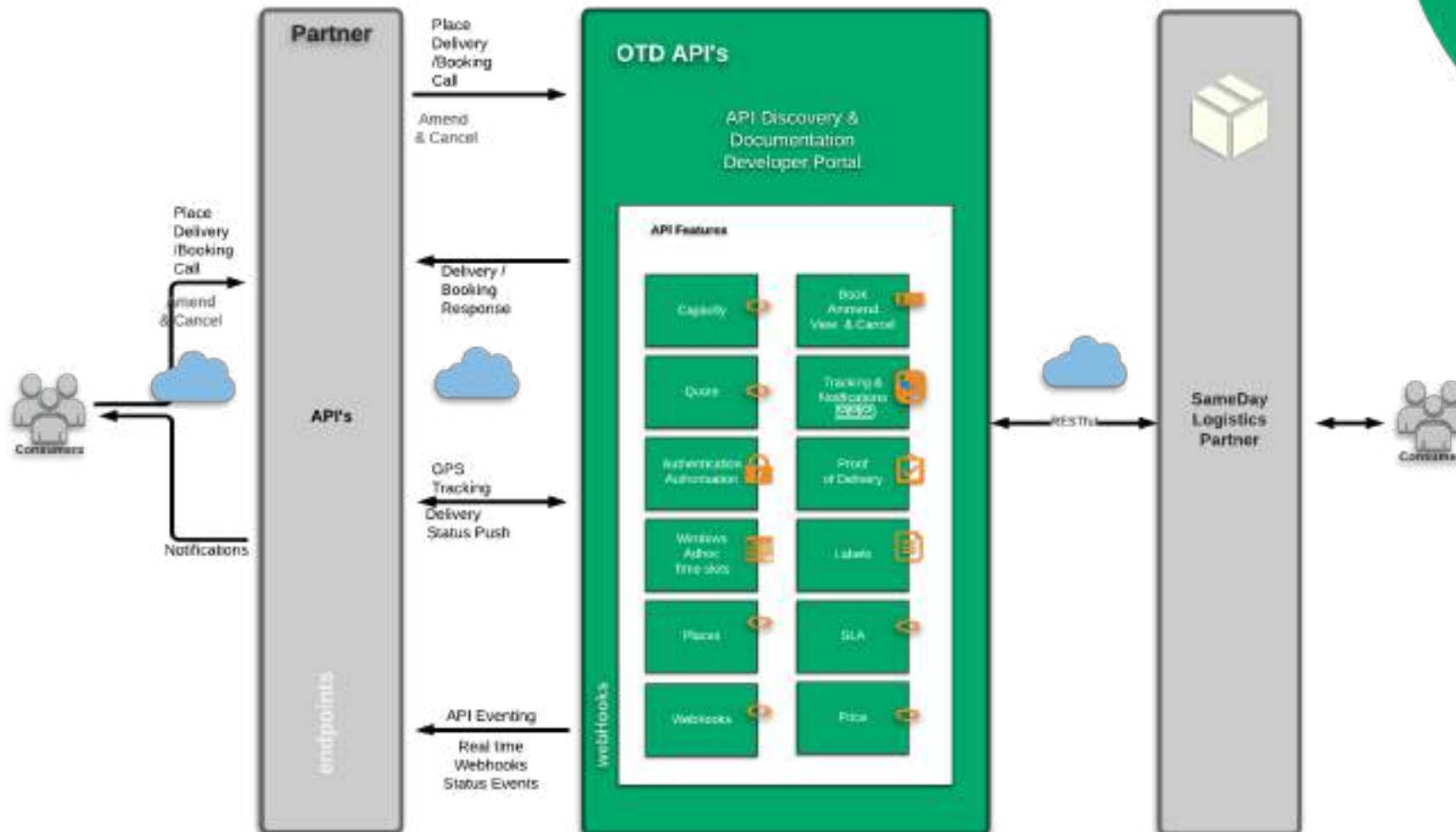
An all in collection and delivery SLA within an agreed geography

Real-Time Tracking



Our flexible real-time push web-hook supporting various security features

How partners can integrate with us



On the dot API Metrics



+Food

Increase order volume



+Retail

Supporting better CX



+OTD App

Offline



+Pharma

New revenue



+Geo & SLA

Sensitive



<400ms

Fast response times for Time-Slots, DW and Bookings



<72 hrs

Easy to integrate



>90%

Success rate of >99% of items delivered in SLA



Customer Satisfaction+

Increased NPS



+Productivity

Cosmo Couriers TBD



+Fleet

Expand through new fleet



Over-the-threshold

In-Home, In-Food

Thank you.



020 7880 1444 onthedot.com/green

