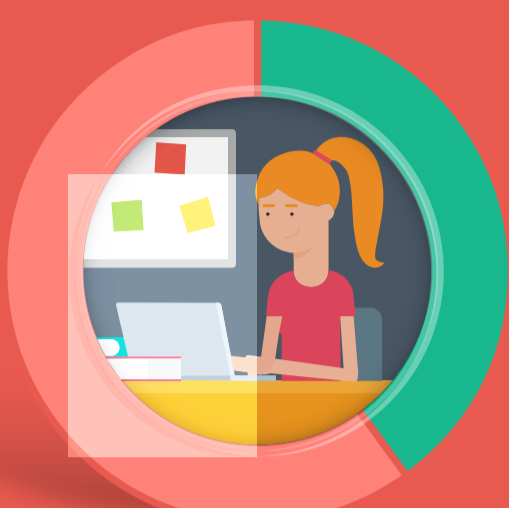


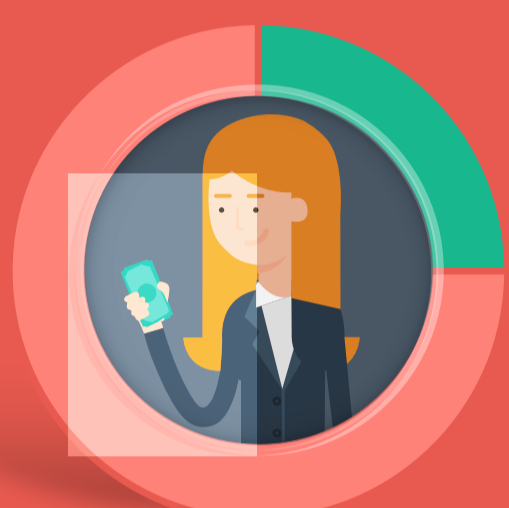
RETAILERS' DILEMMA:

MEETING CONSUMER DEMAND FOR SAME DAY DELIVERY IN 2016

CONSUMER DEMAND FOR SAME DAY DELIVERY IN 2016



40% of Millennials, Gen Xers & Baby Boomers expect same day delivery options. ¹



25% of internet users are willing to pay \$10+ for a product they "urgently needed." ²



64% of Millennials are more willing to make a purchase if there is same day delivery. ³

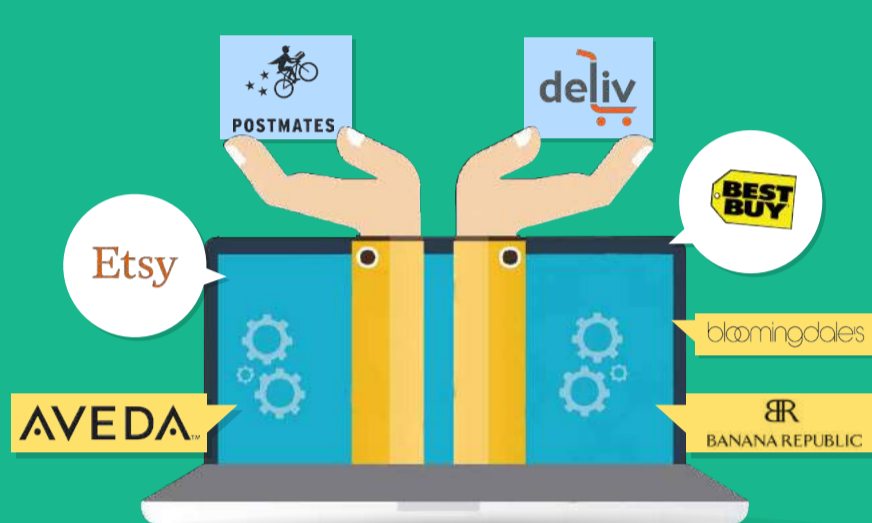


67% of North American shoppers say free shipping is very important. ⁴

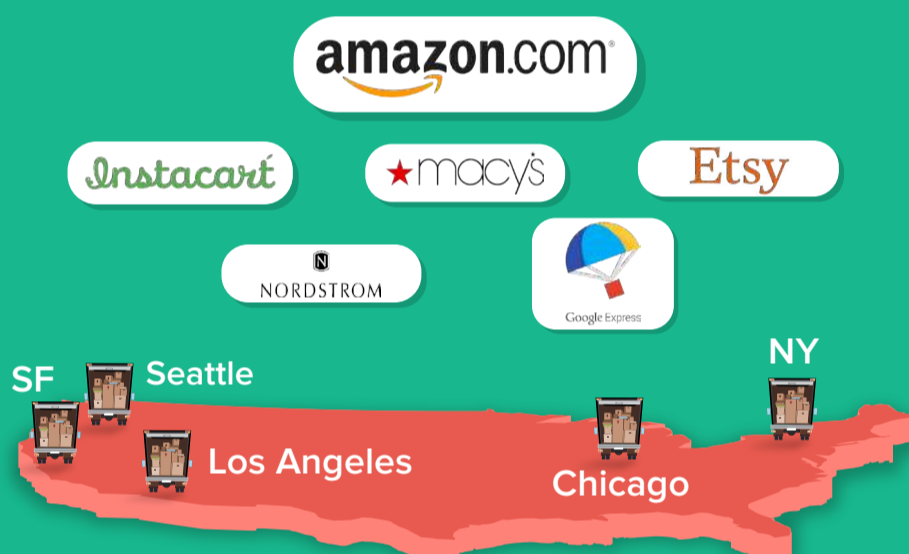
HOW ARE RETAILERS RESPONDING?



About **15%** percent of retailers worldwide provide same day delivery. ⁵



On-demand delivery services aim to provide last mile solutions for retailers.



Retailers have started pilot programs and launched same day delivery in major metropolitan areas.



Amazon dominates the space. Macy's, Google Express and Nordstrom also offer same day in the last year.

WHO COULD ENTER THE SPACE IN 2016?



1

Localized small business in food and retail

2

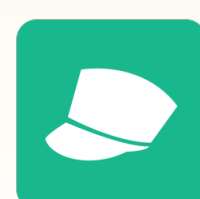
Key competitors of major retailers

3

Highly niched companies targeted to millennials and parents

SOURCES

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2. <http://www.emarketer.com/Article/Do-Todays-On-Demand-Consumers-Want-Same-Day-Delivery/1012436>
3. <http://www.prnewswire.com/news-releases/coldwell-banker-commercial-affiliates-survey-reveals-consumer-expectations-for-same-day-delivery-use-of-mobile-wallet-shaping-retail-experience-300146688.html>
4. http://www.purolatorinternational.com/press-release/Purolator_Survey
5. <http://www.emarketer.com/Article/Do-Todays-On-Demand-Consumers-Want-Same-Day-Delivery/1012436>



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