

Office Freight: Understanding  
deliveries to offices  
November 2015  
TfL number: 15003  
FT number: 1821



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# Background and objectives



# Background

With continuing population growth in London the volume of vehicles travelling in and through the Capital is becoming an increasing problem.

Freight vehicles accounted for 17% of all vehicle kilometres in 2010, TfL view freight as a potential target for improving London's roads.

The overall objective for this piece is in relation to the office sector:

- TfL would like to build a better picture of the delivery and servicing activity in London's offices (which generates freight transport on London's roads)

**1** Identify emerging patterns with the office freight market

**2** Identify office characteristics that correlate with delivery variables such as number of deliveries, frequency, type, time etc





# Objectives

The specific objectives are:



To understand offices in London in relation to deliveries/ collections/ service visits

Collecting information on the volume and type of deliveries/ collections/ service visits that people receive in their offices.

Understanding the key details of deliveries e.g. times, days, mode of transport used, parking used, any problems

Understanding the impact of variables such as building/ company size, industry and area of London

The background is a solid orange color. On the right side, there is a large, abstract white shape that resembles a stylized arrow or a jagged edge pointing left. Overlapping this white shape is a smaller, solid orange shape that also points left, creating a layered effect.

Methodology and sample

# Methodology slide

## Online survey

1.

1,293 online interviews

2.

Business sample – those involved with deliveries/ collections/ service visits to their office building, who told us they were in a position to give details about this subject

3.

All respondents were based in offices within the M25

4.

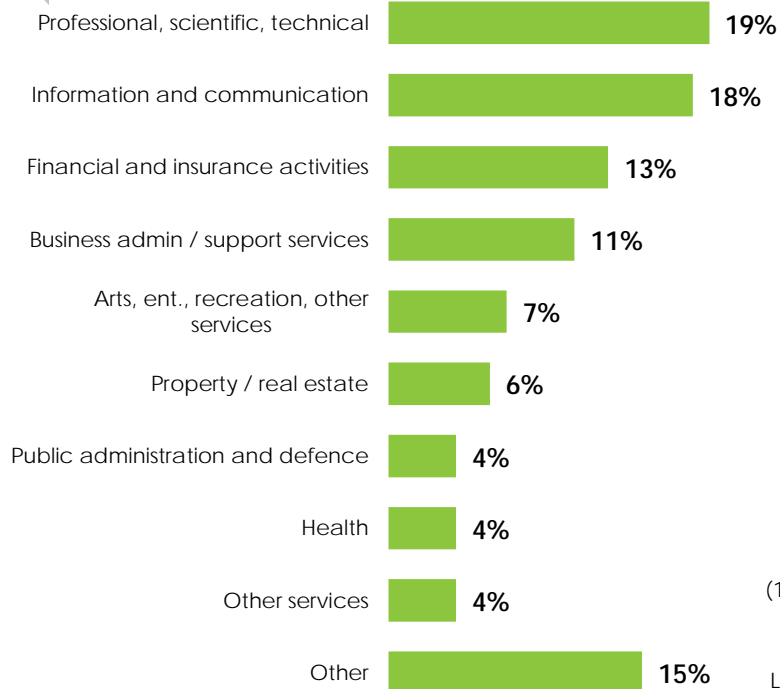
15 minute survey

5.

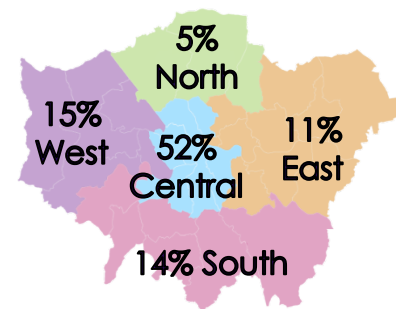
Fieldwork dates: 16th September – 6th October 2015

# Sample breakdown

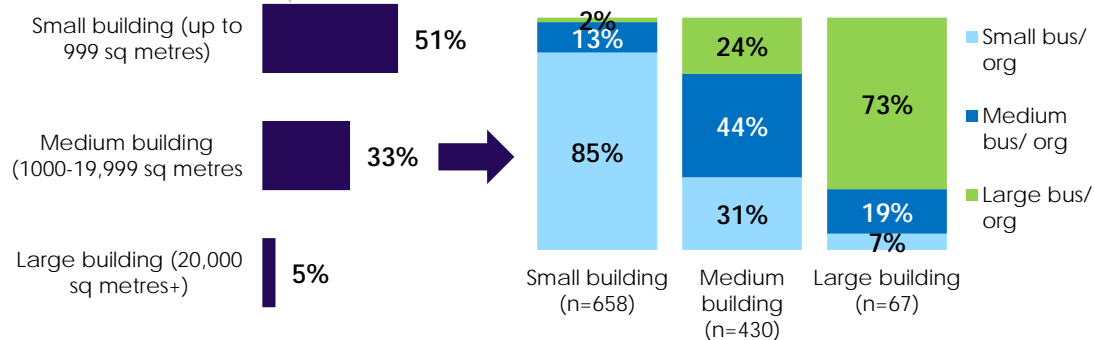
## Industry (SIC codes)



## London region



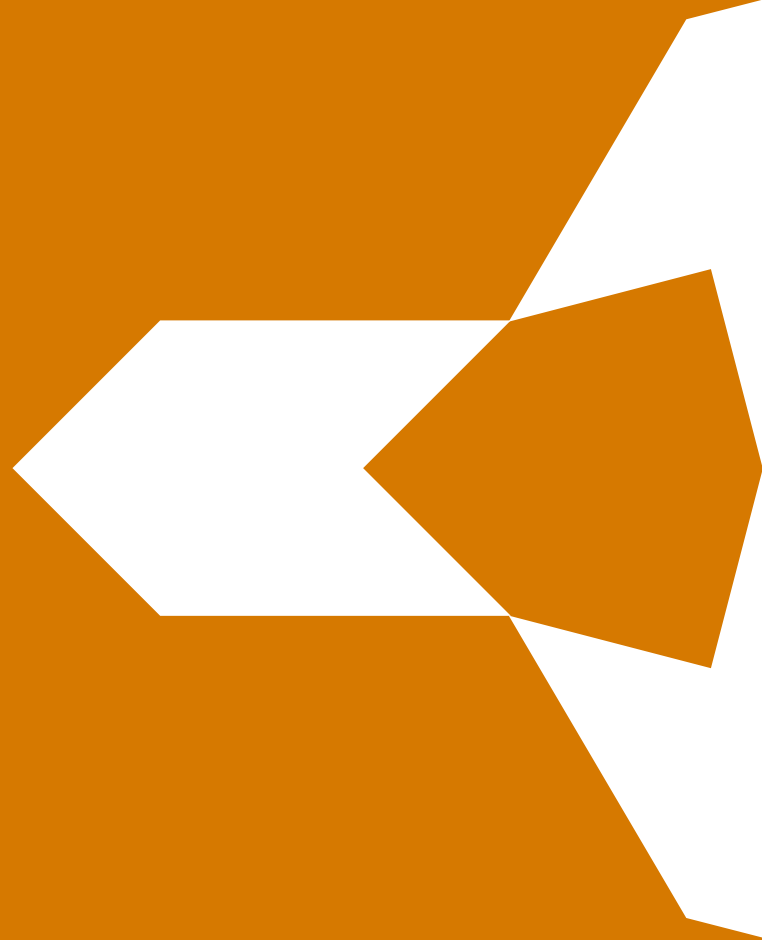
## Building size



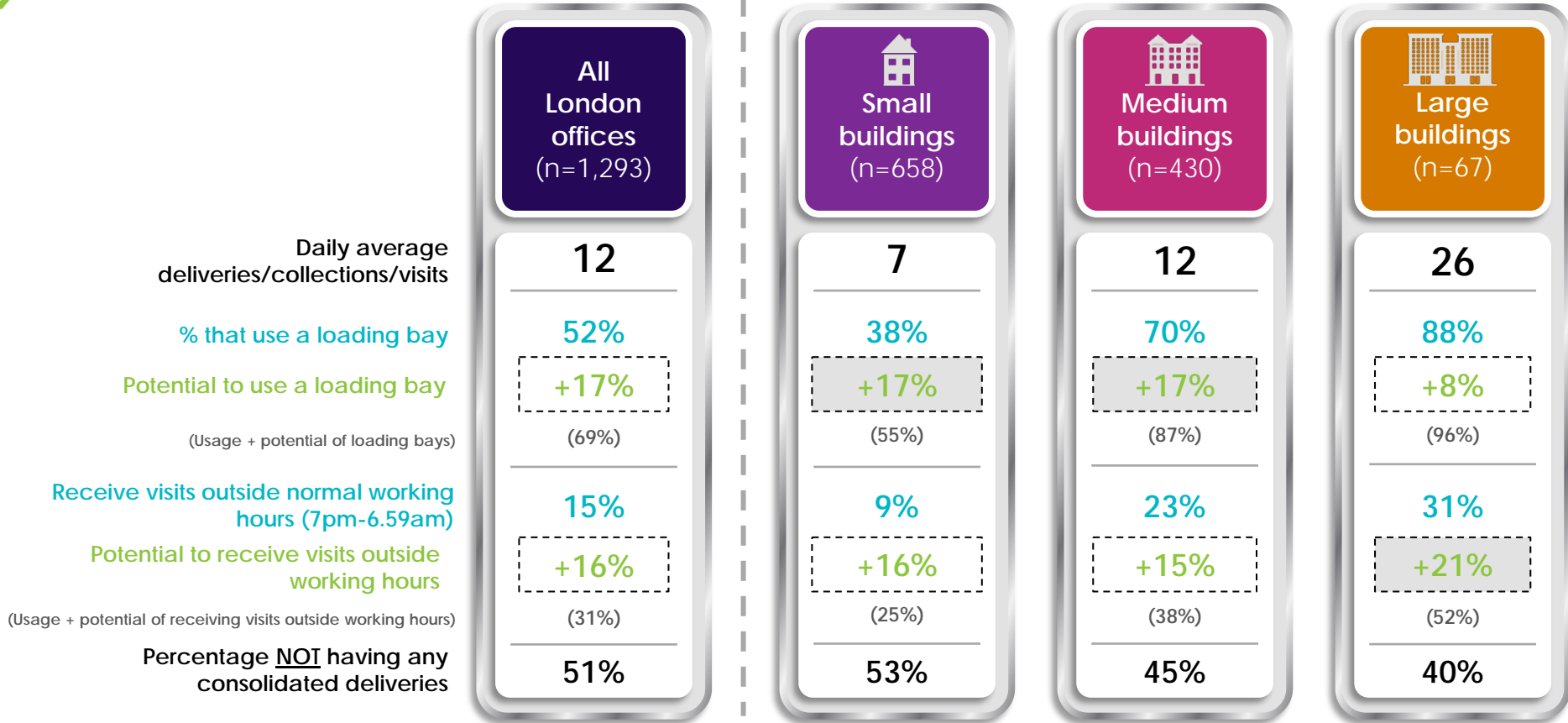
Small business/ organisation = 1-49 employees (n=764); Medium business/ org = 50-249 employees (n=329); Large business/ org = 250+ employees (m=194)



Key findings



# Overview of the London Office Freight market



Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)



# Key findings: Understanding offices in relation to visits

**Bigger buildings** are better equipped for deliveries – they're more likely to have a loading bay, post room, 24 hour receptionist and can receive more deliveries outside normal working hours

01

Over **two thirds** of offices have access to a loading bay, the majority of which are off street

- However, over **one in five** use restricted parking areas as an option – rising to a **quarter** of small buildings

02

Just under **1 in 3** offices can receive visits outside of 'normal' working hours (between 7am and 7pm), however only **16%** of all offices are currently doing so

03

**49%** are currently receiving deliveries **in consolidation**, increasing to **60%** among larger buildings. However consolidating deliveries appears to be driven by the providers and not the receiving businesses

04

Nearly **three-fifths** of businesses have a post room, increasing to **two-thirds** of shared office buildings

05

**Almost all** offices allow **personal deliveries** (only **3%** of companies have restrictions on staff receiving personal post) – accounting for nearly **one fifth** of deliveries on average

06

# Recommendations

Larger buildings receive the highest volume of deliveries and are currently well equipped to handle them. However, they need to realise their potential to further increase their delivery handling efficiency by receiving even more deliveries **after 7pm** – potential to increase deliveries between 7pm and 7am by up to **21 percentage points**

01

**Smaller and medium sized buildings are less equipped to handle deliveries compared to their larger counterparts but do have potential to increase efficiency:**

- Loading bay usage could be increased by up to **17 percentage points** for both small and medium buildings
- Around **15%** of deliveries could be received outside normal working hours instead
- Nearly half of deliveries aren't being received in combination with others. However, this is likely to be driven by the suppliers

02

By educating businesses on their options and benefits with regards to re-timing and consolidation, there are definitely areas where the movement of products and services around the Capital can be improved to reduce congestion on London's roads

03

# Key findings: Understanding the details of deliveries/ collections/ service visits

Business post deliveries are the most frequent visit to offices (average of seventy-five on a daily basis) - cleaning visits and personal post/ deliveries are also very frequent



- **Business post** and **personal post**/ deliveries are most likely to be received **over five times a day** (More than five deliveries a day are being received by **7%** of companies for business post and **6%** of businesses for personal post)
- **Larger buildings** receive the **most daily deliveries/** collections and service visits across almost all visits
- **Half** of offices are currently **not receiving** any of these deliveries/ collections/ service visits **in combination**

Key stats in relation to deliveries:



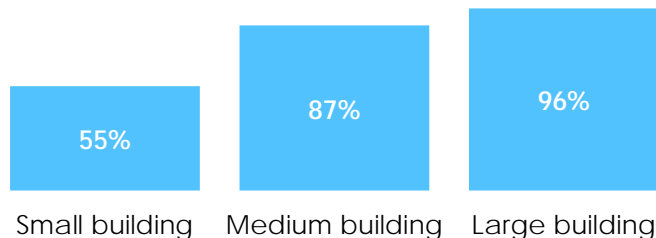
- There is roughly an even spread across the week, but **Fridays** are particularly **busy** for cleaning and professional/ letter document collection
- **10am-1pm** is the **most popular time** for deliveries. Cleaning visits are more likely to be between 4pm-10pm and waste collection before 10am
- The **majority of visits** are **30 minutes or less**. Cleaning and maintenance of the building/ equipment visits generally last longest
- **Vans** are the **most used** mode. Lorries are used mainly for waste collection/ bulky deliveries and bikes mainly for professional documents
- **Off street parking** areas/ loading bays are **used most frequently**. Over 1 in 10 used restricted parking areas – particularly for waste collection



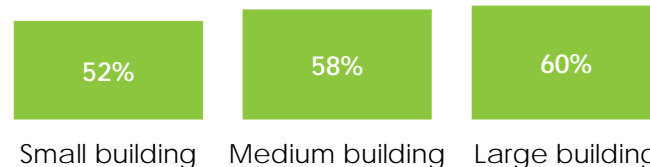
Impact of building size

# Bigger buildings are generally better equipped for deliveries – they're more likely to have a loading bay, post room, 24 hour receptionist and consequently can receive more deliveries outside normal working hours

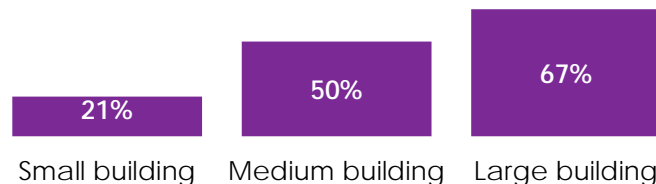
Have use of a loading bay?



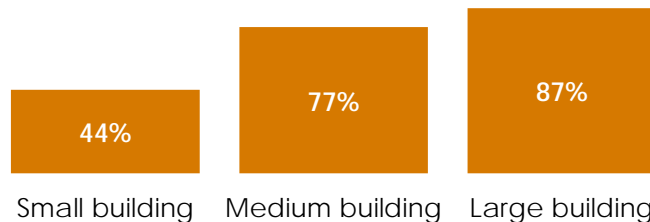
Can deliveries be made outside normal working hours?



Office building has 24 hour receptionist/ concierge?



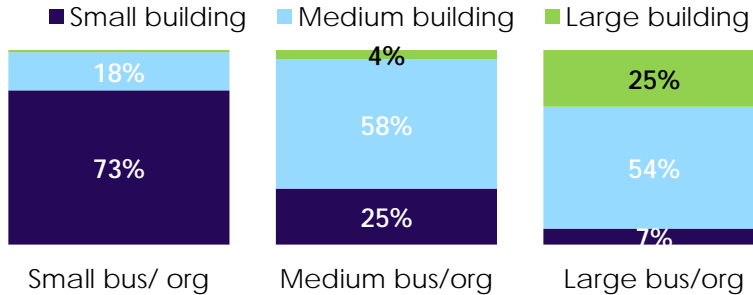
Have a post room?



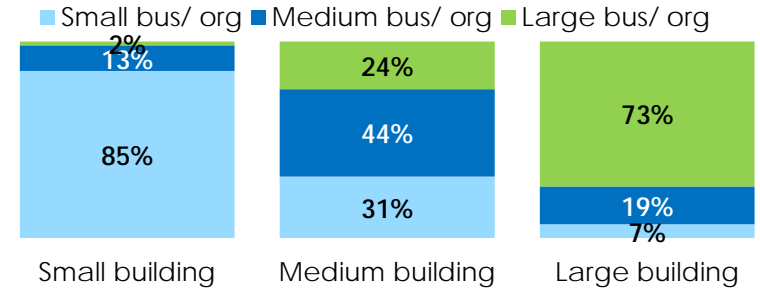
Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)

# A direct correlation exists between number of employees and building size

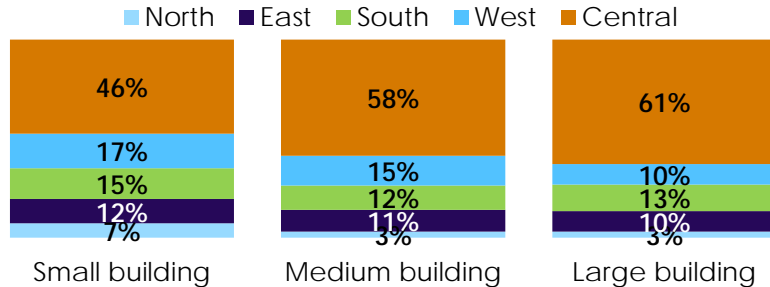
Size of business by building size



Building size by size of business



Location



Larger buildings are occupied by more businesses/ organisations from the following industries:

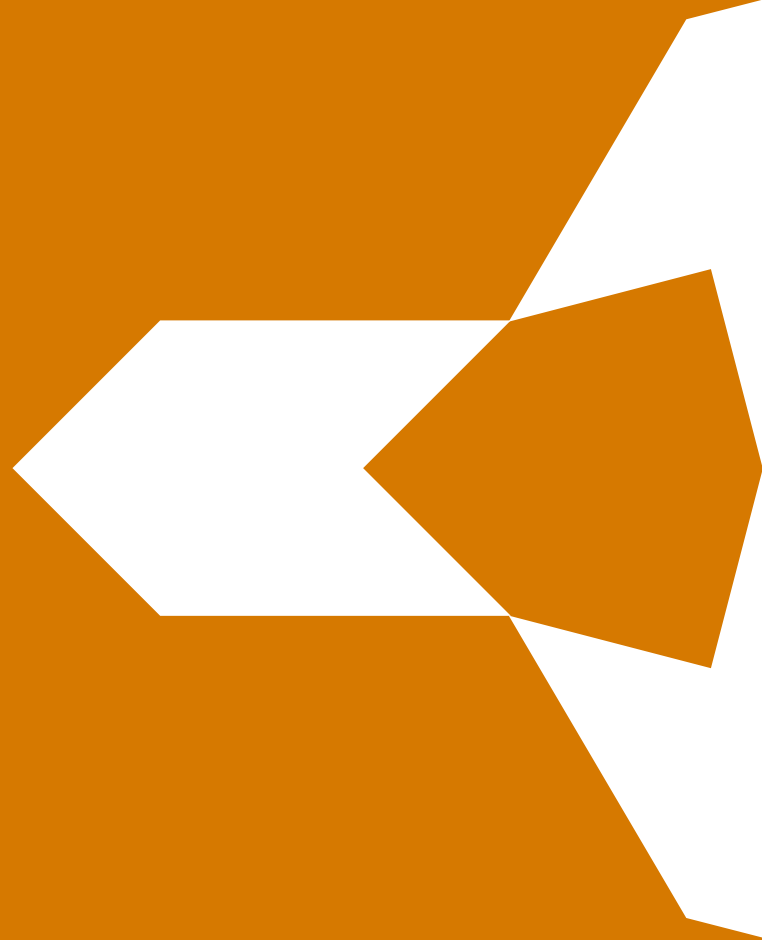
- Information and communication (25% large buildings vs. 18% total)
- Financial and insurance activities (24% large buildings vs. 13% total)
- Public administration and defence (10% large buildings vs. 4% total)

Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)

Small business/ organisation = 1-49 employees (n=764); Medium business/ org = 50-249 employees (n=329); Large business/ org = 250+ employees (m=194)



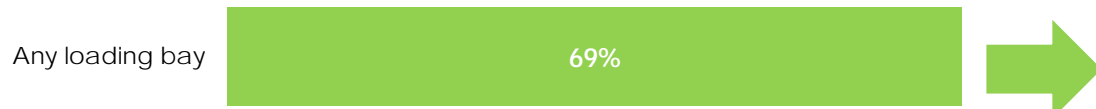
Parking options





# Around 7 in 10 offices have access to some form of loading bay, though only half of offices actually use one

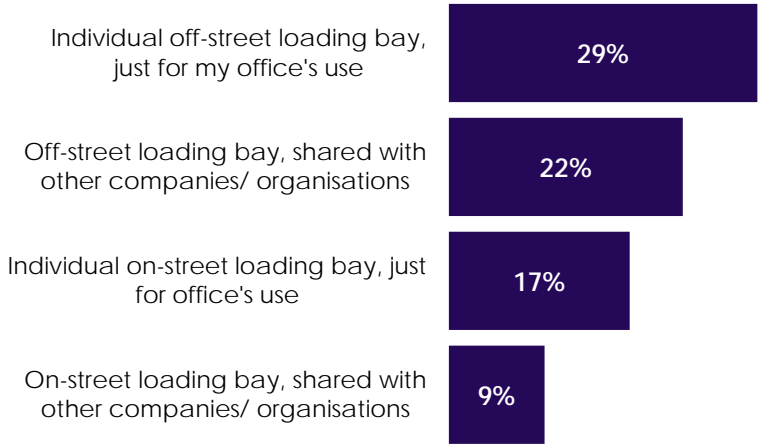
## Loading Bay arrangements



**52% actually use a loading bay**

Potential Opportunity to use a loading bay +17%  
 (% that have one minus % that use one)

### Type of loading bay:

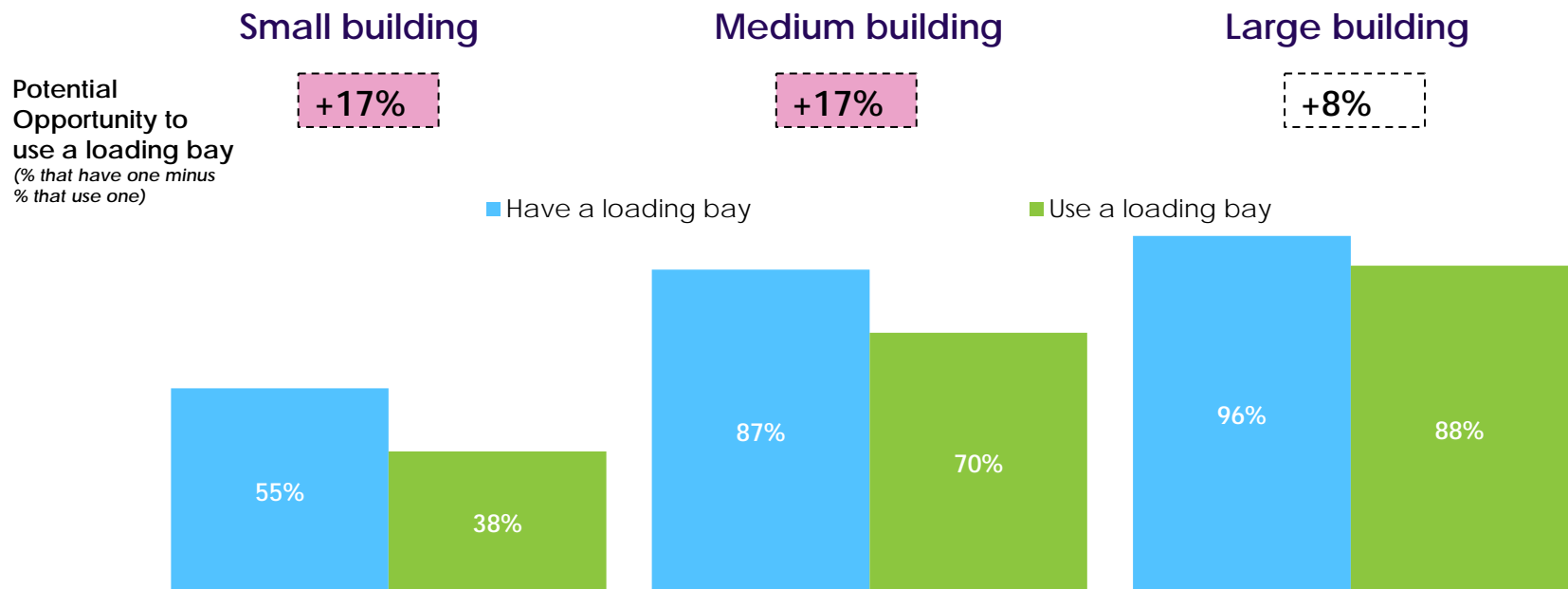


O8. What are the loading bay arrangements in your office? By a loading bay we mean a designated area specifically for loading/ unloading, usually marked out by white lines. Base: Total sample (n=1,293)



# Smaller and medium buildings have less access to loading bays but a greater potential to use existing ones more

% that can and do receive visits outside normal working hours (7pm-6:59am)



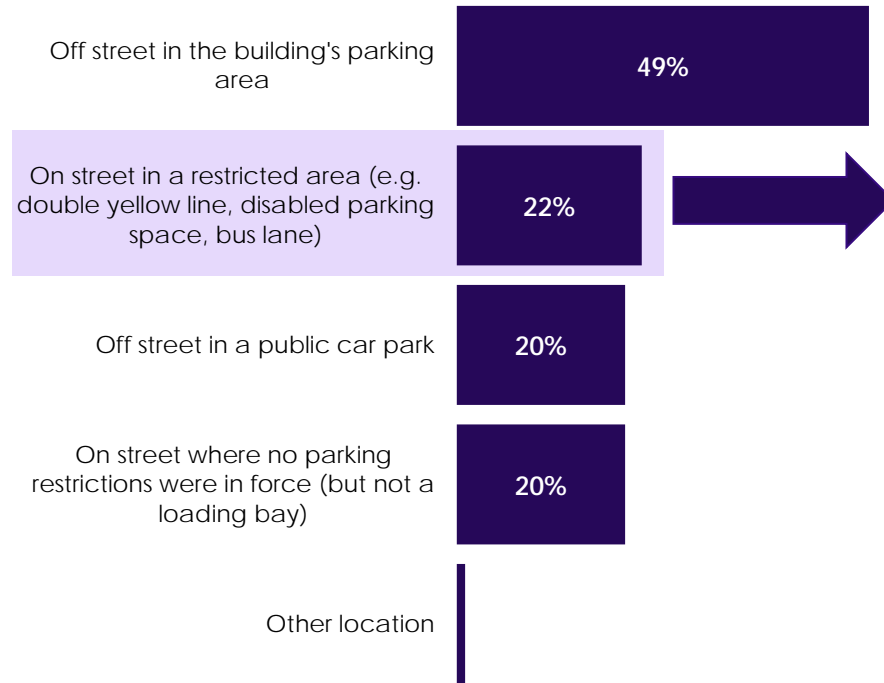
O8. What are the loading bay arrangements in your office?

O9b. Roughly what proportion of deliveries, collections and service visits to your office use each of the following for parking?

Small building = up to 999 sq. metres (n=658); Medium building = 1000 - 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)

# Other than loading bays, nearly half can park in the building's parking area. However over 1 in 5 use restricted parking areas as an option

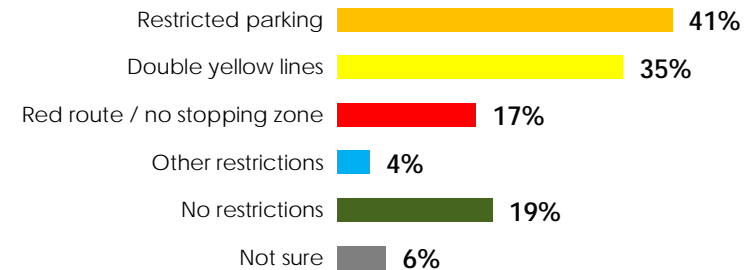
## Other parking options available (other than loading bays)



### More likely to use restricted parking areas:

- In central London (30% vs. 10% to 16% in other regions)
- Smaller companies (25% vs. 17% medium and 18% large)
- Those with no loading bay (35%) or on-street shared loading bay (46%)

### 75% of offices have some form of parking restrictions in place outside – up to 83% in Central London (n=1,293)



O9a. Other than loading bays, what are the other parking options that can be used for loading/ unloading at your office?

O10a. What, if any, parking restrictions are there outside your office? Base: Total sample (n=1,293)

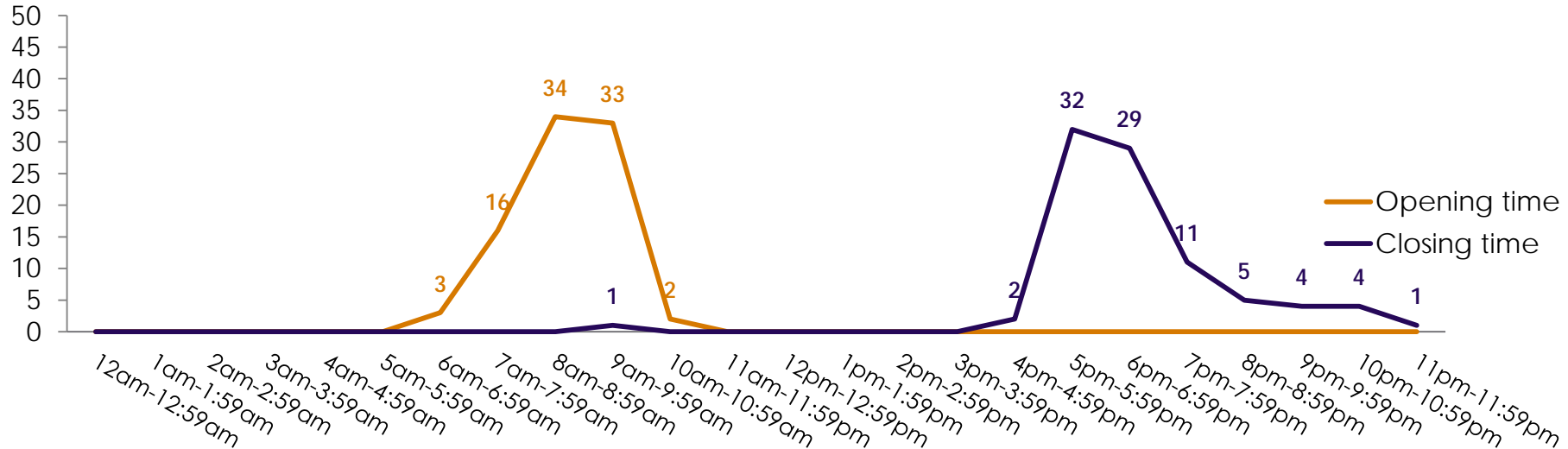


Times of deliveries/ collections/  
service visits

# Most offices' business hours start between 7-10am and finish between 5-8pm – over half claim they can receive deliveries outside these hours

## Normal working hours

**52%** claim that they can receive deliveries, collections or service visits outside of **their own office's opening hours**



**9% of offices are manned 24 hours a day**

O5ai. What are the standard business hours of your office? O5aii. Can deliveries, collections or service visits be made out of these normal working hours?

O5c: Is it possible to receive deliveries, collections, service visits at these times? Base: Total sample (n=1,293)



However, in terms of deliveries being possible after 7pm and before 7am, this decreases to 3 in 10 businesses

Actual delivery times vs. possible delivery times

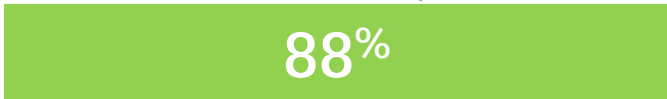
Potential Opportunity to Receive Deliveries

+14%

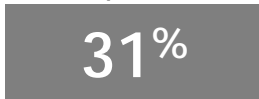
+16%

Time CAN receive deliveries

Inside average working hours (7am-6.59pm)



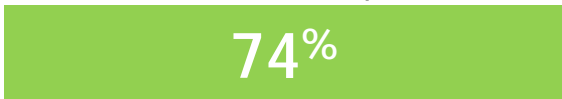
Outside average working hours (7pm-6:59am)



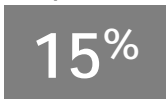
% that can receive deliveries in each of these slots

Time EVER DO receive deliveries

Inside average working hours (7am-6.59pm)



Outside average working hours (7pm-6:59am)



% that do receive deliveries in each of these slots

O5c: Is possible to receive deliveries, collections, service visits at these times? Base: Total sample (n=1,293)

O5b. Using the time slots below, please type the % breakdown of deliveries which generally happen within each time slot. Base: rebased on total sample (n=1,293)



# Large buildings are more prepared to receive visits outside working hours, and they have the most potential to increase deliveries received in this time period

% that can and do receive visits outside normal working hours (7pm-6:59am)

Potential Opportunity to receive visits  
(% that can minus % that do)

Small building

+16%

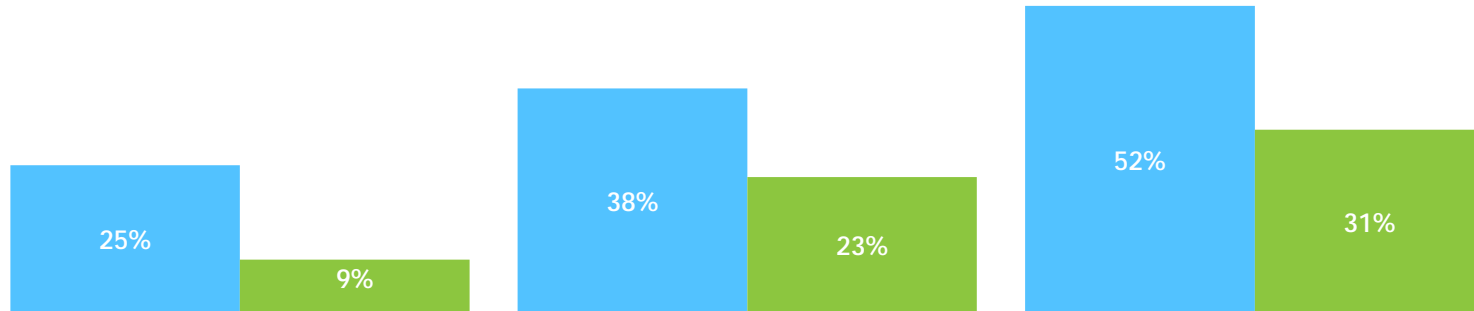
Medium building

+15%

Large building

+21%

■ Can receive visits outside normal working hours ■ Do receive deliveries outside normal working hours



O5c: Is possible to receive deliveries, collections, service visits at these times?

O5b. Using the time slots below, please type the % breakdown of deliveries which generally happen within each time slot.

Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)



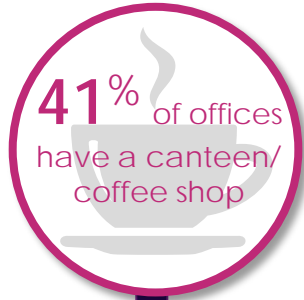




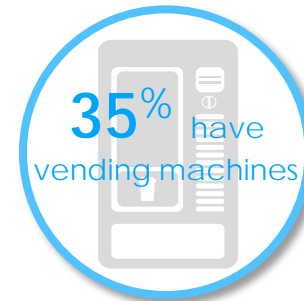
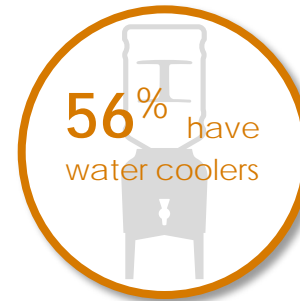
Other factors impacting the  
deliveries/ collections/ service  
visits

Most offices have kitchen areas and photocopiers. Over 40% have a canteen/ coffee shop, which in many cases requires a separate team

## Facilities in the building

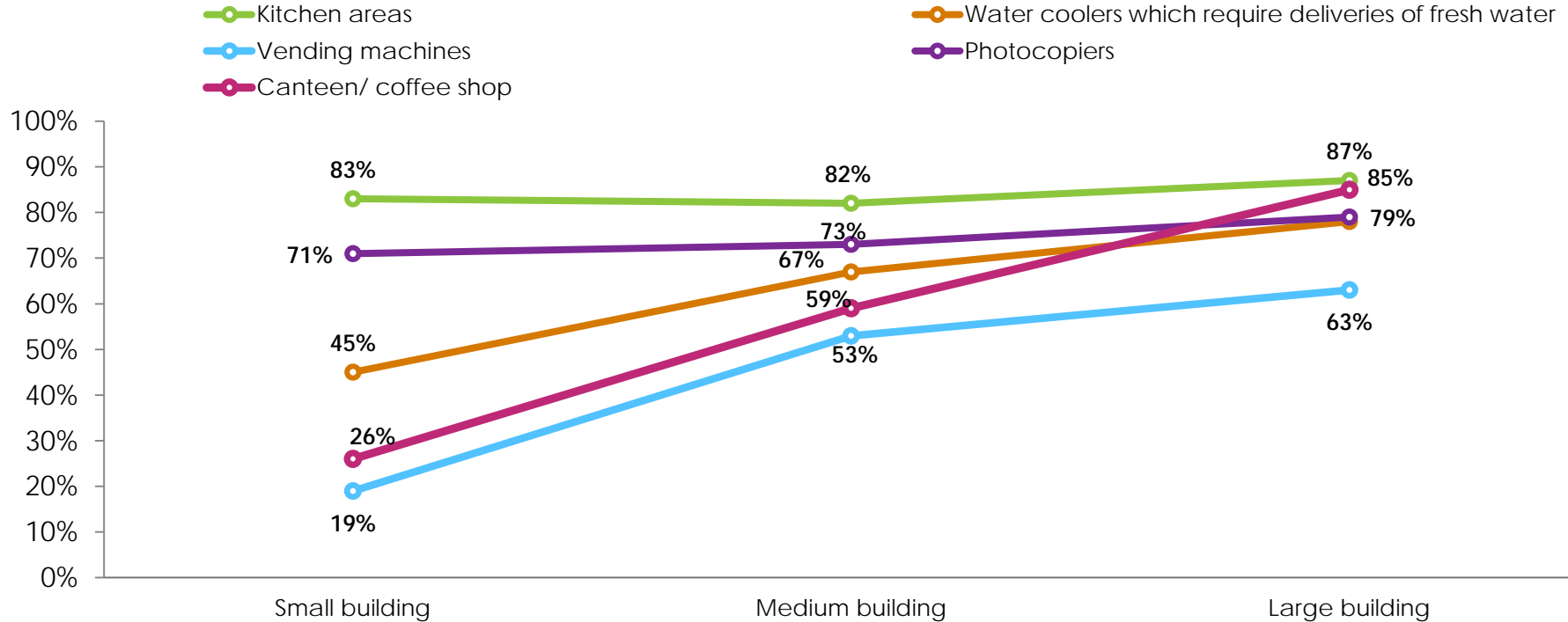


### Handled by... (n=533)



O11: Does your office have a canteen/ coffee shop? Base: Total sample (n=1,293). O12: Who mainly handles the deliveries for the canteen/ coffee shop? Base: those with a canteen/ coffee shop. O13: Which of the following, if any, does your office have?. Base: rebased on total sample (n=1,293)

# Most buildings have kitchen areas and photocopiers. Prevalence of other equipment/areas tends to be higher in bigger buildings



Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)

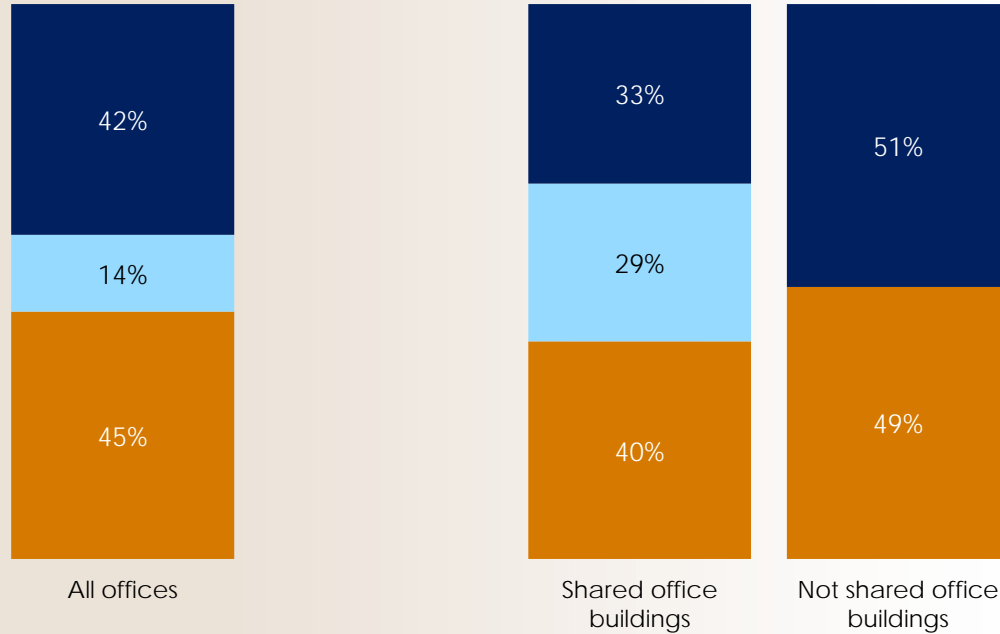
O11: Does your office have a canteen/ coffee shop?

O13: Which of the following, if any, does your office have?. Base: rebased on total sample (n=1,293)



# Nearly 60% have a post room, increasing in shared buildings - over 1 in 4 in shared buildings share this post room with other companies

## Post room arrangements



- No post room
- Shared central post room with other offices in the building
- Individual post room for my office

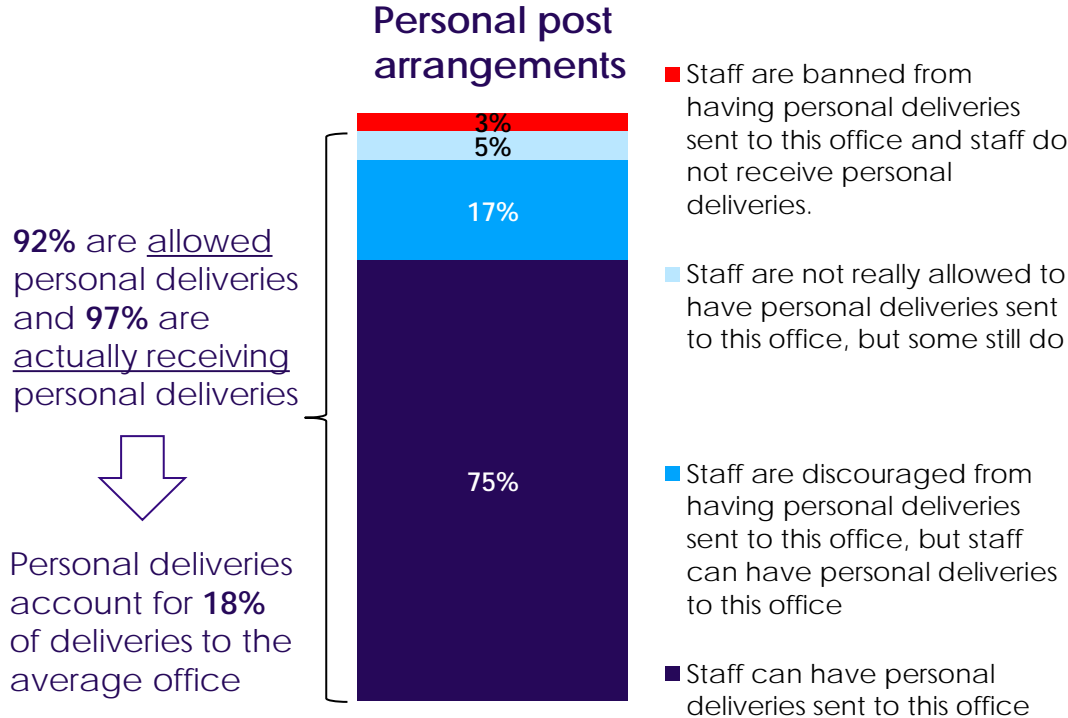


O7. What are the post room arrangements in your office? Base: Total sample (n=1,293)

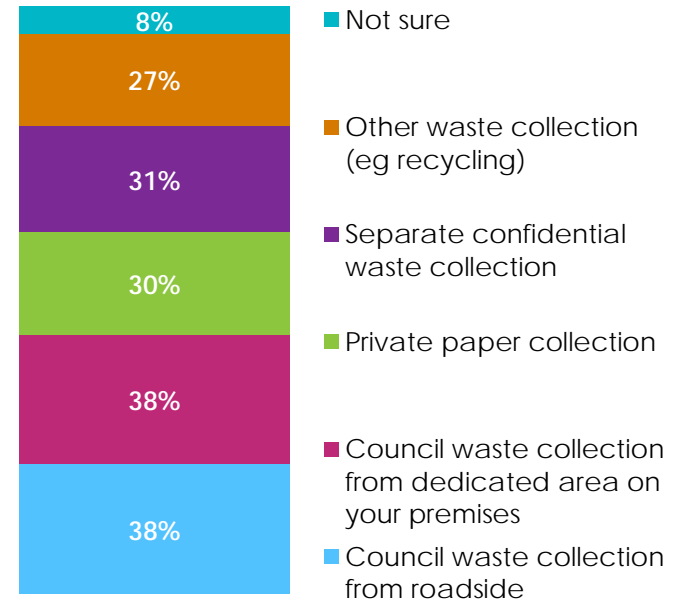


Nearly all offices allow personal deliveries, which on average account for a fifth of deliveries. The main method for waste collection is with councils.

## Other delivery/ collection arrangements



### Waste collection arrangements



O14. Which of the following arrangements do you have for waste removal from your office?

E1. Which of the following best applies to your company/ organisation's approach to personal deliveries/ online orders sent to staff at your office? Base: Total sample (n=1,293)

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Understanding the details of  
deliveries/ collections and service  
visits

# How this section was asked



The following section shows overall delivery/ collection/ service visit levels, which were asked to all respondents..

Respondents were then asked detailed questions (day, time, length etc.) for up to five deliveries/ collections/ service visits, which they said they receive at least once a month.

To ensure they remembered the details clearly, they were only asked details about deliveries/ collections/ service visits they had received in the last week.

They were asked about their most recent delivery/ collection/ service visit of each type (for instance, their most recent business post delivery).

Respondents went through in a loop (asked all questions about one delivery at a time).

A least fill basis was used, to ensure we captured the details across an even spread of delivery types.

In order to compare across deliveries/ collections/ service visits, we have focused the detailed questions on ungrouped visits i.e. those happening separately

# Detail of deliveries/ collections/ service visits

Base sizes for the detailed questions in the next section

Business Post	181
Food/ Drink	187
Stationery	197
IT equipment	189
Other small business related delivery (hand held)	182
Other bulky business related delivery (sack trucks/pallets)	200
Personal post (includes internet orders)	141
Personal deliveries, eg parcels (includes internet orders)	171
Paper waste collection	173
Other waste collection	176
Professional documents/ letters	177
Other collection	190
Cleaning	404
Maintenance of building e.g. lights, toilets etc	391
Maintenance of equipment e.g. printers, computers etc	380
Other service visit	258

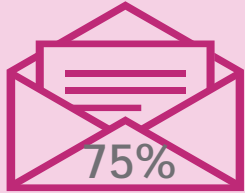


***Please note: all averages in this section are based on a simple average across all deliveries/ collections/ service visits***



# Key facts: Most frequent deliveries

## Business Post



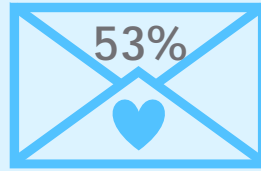
75%

receive daily  
(18% more than once a day)

- On Mondays (22%) and Tuesdays (18%)
- Between 10am-1pm (49%)
- Last less than 10 minutes (78%)
- Delivered on foot (28%)

## Personal Post

receive daily



53%

(15% more than once a day)

- Between 10am-1pm (54%)
- Last less than 10 minutes (84%)
- Delivered on foot (35%)
- Park on the street where no restrictions are in force (20%)

## Cleaning

receive daily

53%



(9% more than once a day)

- On a Friday (30%)
- Between 4-7pm (21%) and 7-10pm (17%)
- Last over an hour: 1-2 hours (33%), 2 hours+ (14%)
- Arrive on foot (30%) or by car (17%)
- Park off street in the buildings parking area (43%)

## Personal deliveries i.e. parcels



















47% receive daily

(14% more than once a day)

- Between 1-4pm (28%)
- Last under 10 minutes (80%)
- Delivered by van (57%)
- Park on the street where no restrictions were in force (20%)

More likely than average...

# Key facts across deliveries – showing the highest score(s) for each question

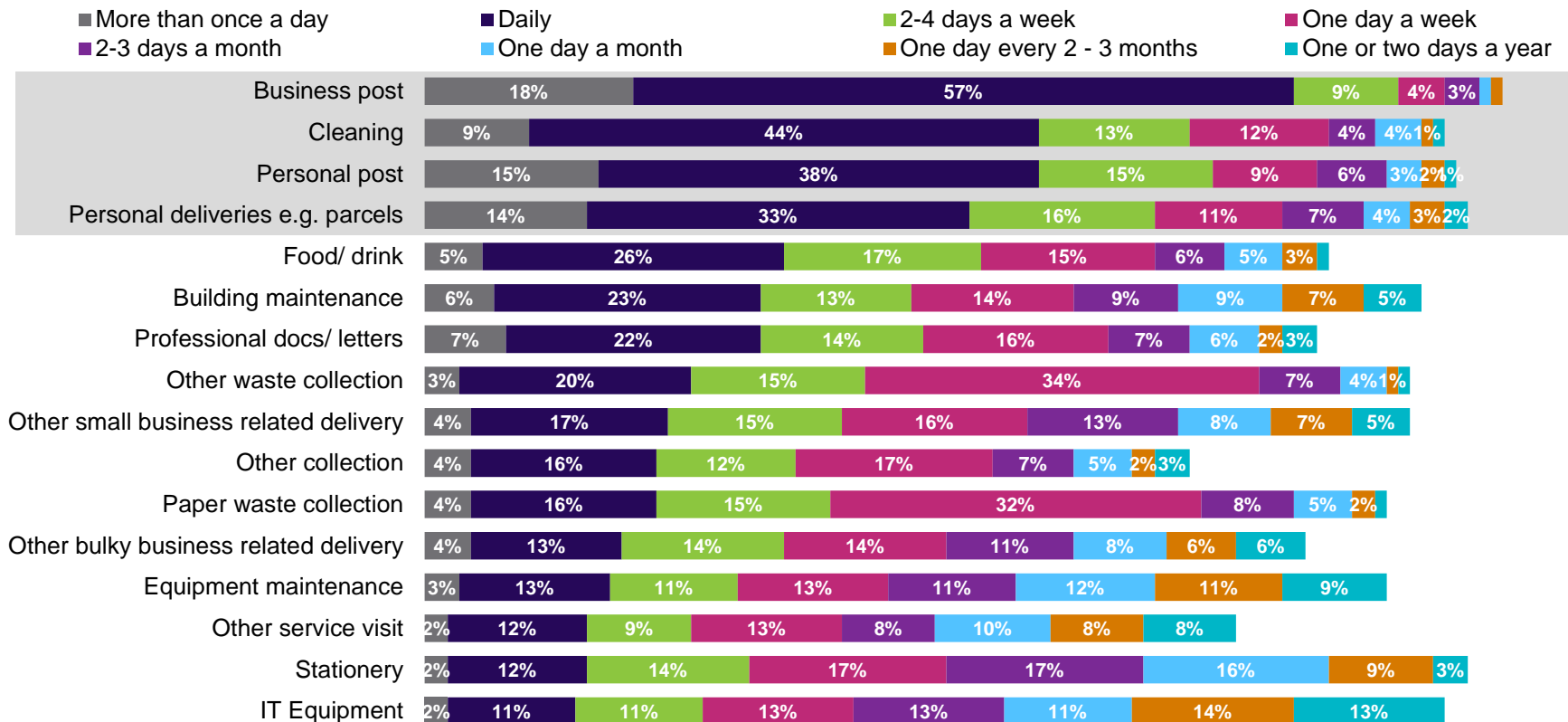
	% daily deliveries	Day	Time	Length	Vehicle used	Who makes delivery/ collection
Business Post	75%	Monday/ Friday	07:00 16:00	 Less 10		Royal Mail/ Courier
Food/Drink	31%	Less likely on Thursday	07:00 16:00	 Up to 30		Local tradesperson/ National Distributer
Stationary	14%	Monday/ Wednesday/ Thursday	10:00 16:00	 Up to 30		Courier/ National Distributer
IT equipment	13%	Wednesday	10:00 16:00	 Up to 60		Courier/ National Distributer
Other small business deliveries	21%	Even spread across week days	10:00 16:00	 Less 10		Courier
Other bulky business deliveries	17%	Wednesday	10:00 16:00	 Up to 60		National distributor/ courier
Personal post	53%	Monday/ Tuesday/ Friday	10:00 16:00	 Less 10		Royal Mail/ Courier
Personal deliveries	47%	Fairly even spread across week days	10:00 16:00	 Less 10		Courier/ Royal mail

# Key facts across collections/service visits – showing the highest score(s) for each question

	% daily deliveries	Day	Time	Length	Vehicle used	Who makes delivery/ collection
Paper waste collection	20%	Thursday	07:00 / 13:00 10:00 / 16:00	Less 10		Council
Other waste collection	23%	Wednesday/ Thursday	07:00 13:00	Less 10		Council
Professional documents/ letters	29%	Friday	10:00 13:00	Less 10		Courier
Other collections	20%	Wednesday/ Friday	10:00 16:00	Up to 30		Courier
Cleaning	53%	Friday	07:00 / 16:00 10:00 / 22:00	From 31  Up to -2 hrs		N/A
Maintenance of building	29%	Wednesday/ Friday	10:00 13:00	From 11  Up to -2 hrs		N/A
Maintenance of equipment	16%	Wednesday	10:00 16:00	From 11  Up to -2 hrs		N/A
Other service visit	14%	Wednesday/ Friday	10:00 16:00	Up to 60		N/A

# Business post deliveries are the most frequent visit to offices (75% on a daily basis) - cleaning visits and personal post/ deliveries are also very frequent

## Frequency of deliveries/ collections/ service visits received (ranked on visits received daily)



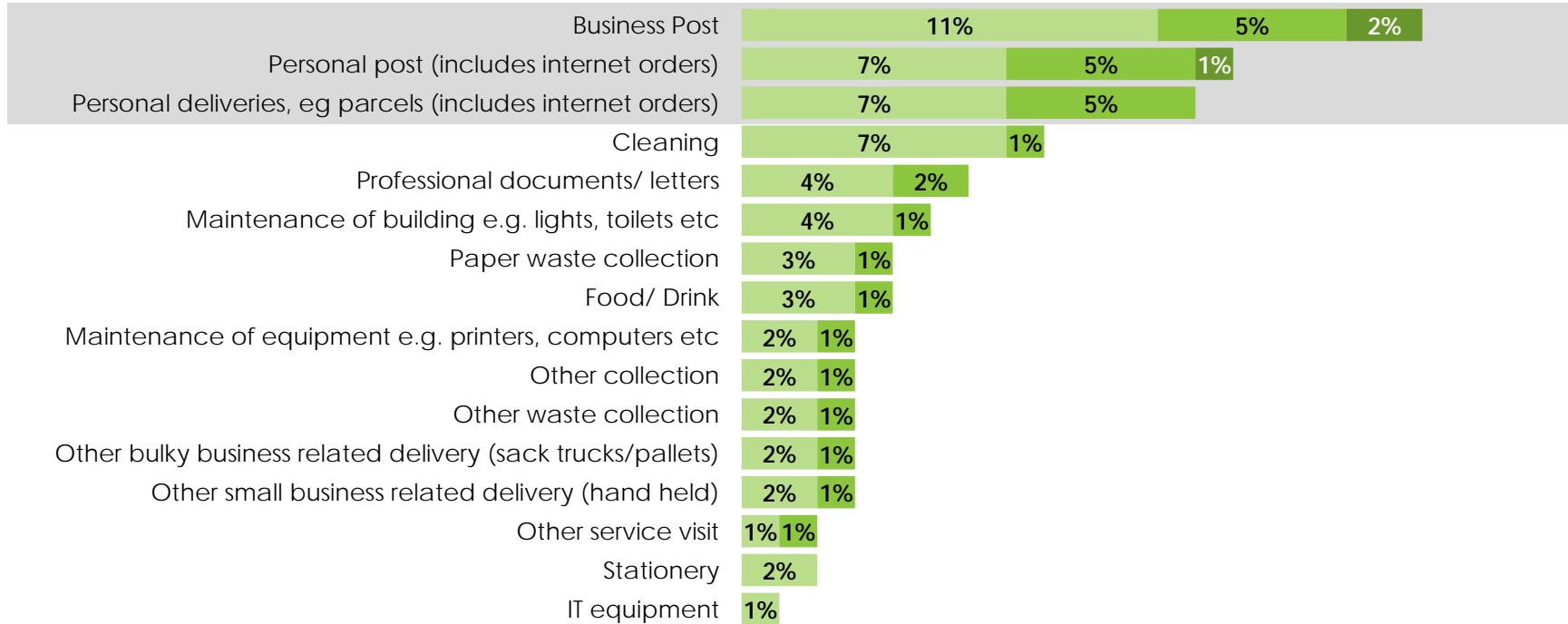
D1. Thinking generally, for each of the types of deliveries, collections and service visits below, how often does your office receive them? Base: Total sample (n=1,293)



# Business post and personal post/ deliveries are most likely to be received over five times a day (7% receive over 5 business post deliveries per day)

## Number of deliveries/ collections/ service visits received per day

■ Receive up to 5 per day ■ Receive 6-50 ■ Receive 50+



D1b. Thinking about the following deliveries./ collections/ service visits that you receive more than once a day, on average how many of these do you receive?

Base: Asked to those received 'more than once a day.' Rebased on total sample (n=1,293)

# Larger buildings receive a higher number of daily visits for the majority of items – there is a higher volume of visits in inner London

## Impact of building size and area on frequency of deliveries/ collection/ service visits

### Percentage of daily deliveries received by larger buildings compared to all buildings:

- Business post (79% vs. 76% total)
- Food/ drink deliveries (55% vs. 31% total)
- Stationery deliveries (33% vs. 15% total)
- IT equipment deliveries (31% vs. 13% total)
- Other small business related delivery (48% vs. 22% total)
- Big bulky deliveries (32% vs. 16% total)
- Personal post (61% vs. 53% total)
- Personal deliveries (67% vs. 37% total)



Please note: Larger buildings also receive a higher percentage of daily collections and service visits

For almost all visits there is a higher volume in Inner London boroughs compared with Outer London boroughs

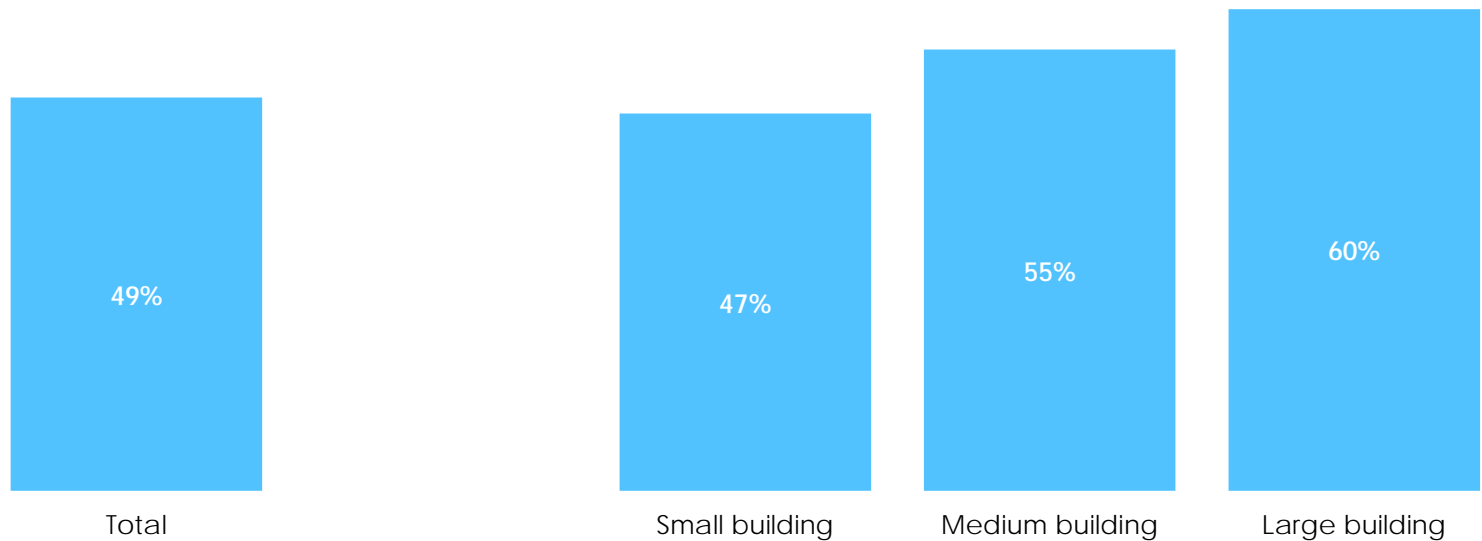
D1. Thinking generally, for each of the types of deliveries, collections and service visits below, how often does your office receive them?

Base: Small building = up to 999 sq. metres (n=658); Medium building = 1000 – 19,999 sq. metres (n=430); Large building = 20,000+ sq. metres (n=67)



# Half receive at least two deliveries/ collections in combination, increasing in larger buildings (potentially decreasing congestion through consolidation)

Received any deliveries/ collections together



D2. Please drag all deliveries which are usually receive together into the same boxes below.  
Base: Those that receive at least two deliveries or collections (n=1,235)



Paper waste/ other waste collections are the most common visit combination. This would suggest that consolidated deliveries are supplier driven, rather than business driven

Top deliveries/ collections generally received together



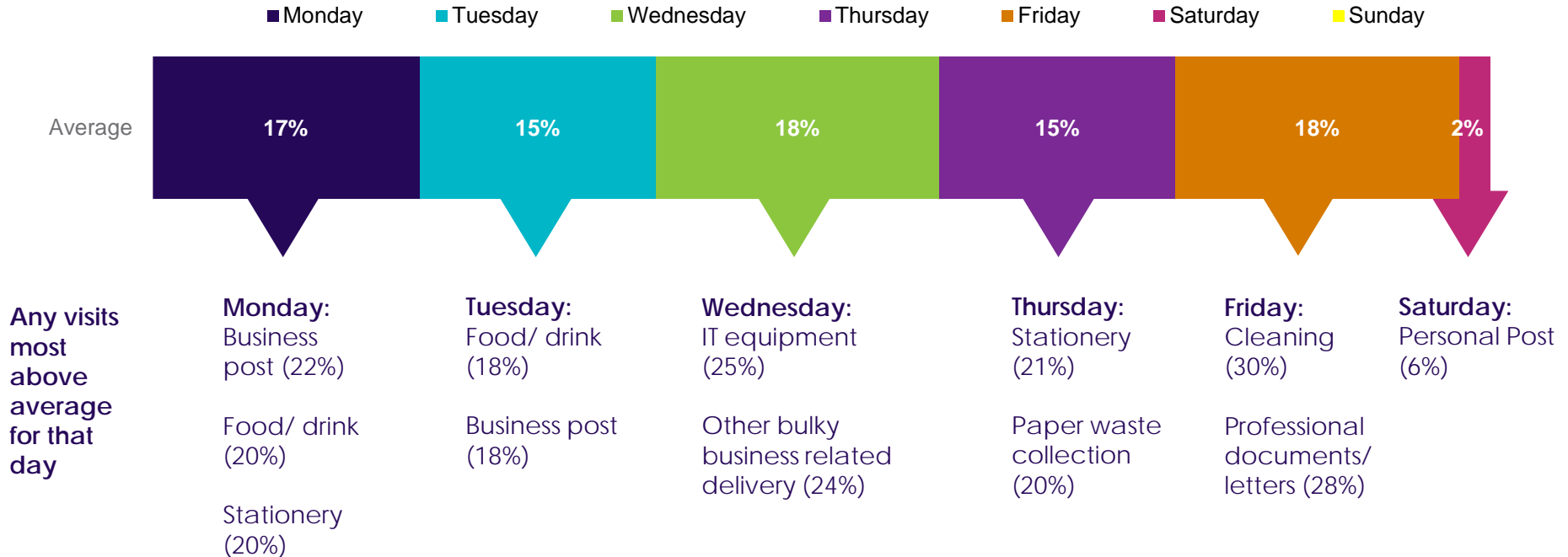
*Please note: There are several other delivery/ collection combinations below 4%*

D2. Please drag all deliveries which are usually receive together into the same boxes below.  
Base: Those that receive at least two deliveries or collections (n=1,235)



# There is a roughly even spread of visits across weekdays – Fridays appear to be particularly busy for cleaning and professional/ letter document collection

## Days deliveries/ collections/ service visits received



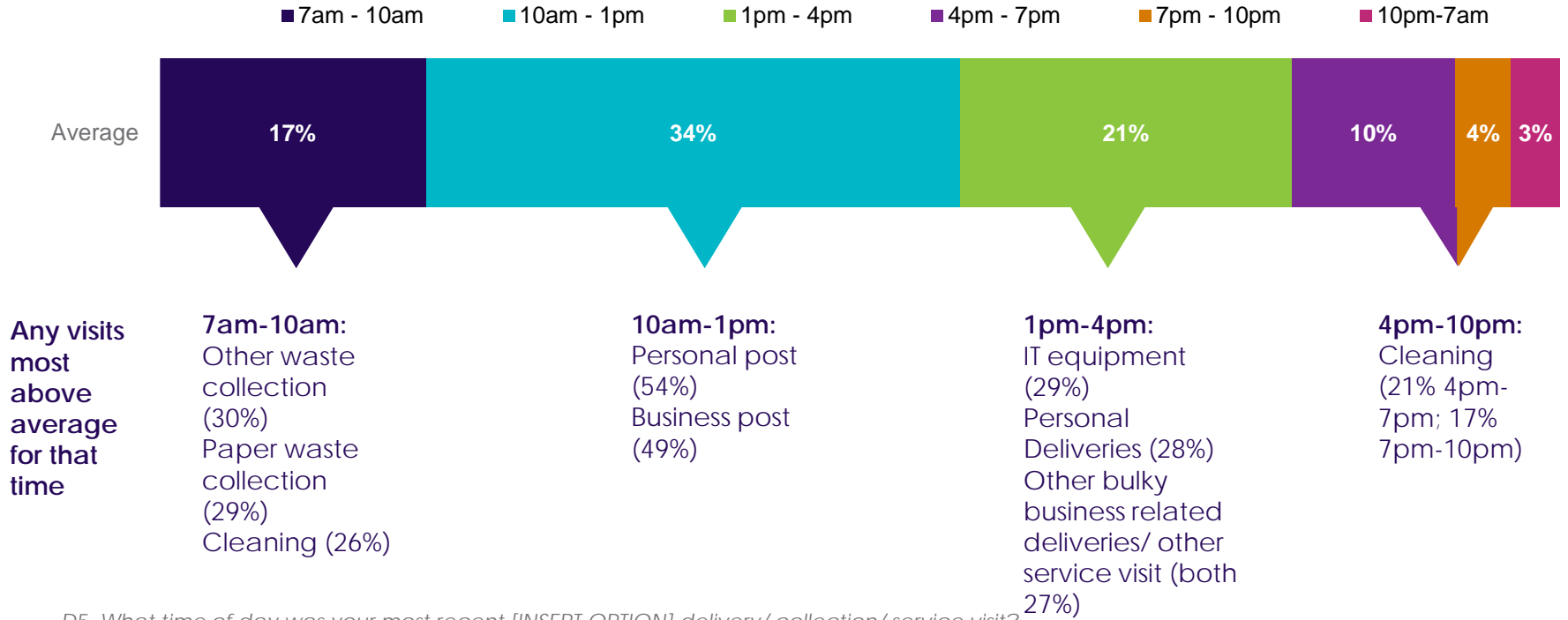
D4. Thinking about the most recent [INSERT OPTION] delivery/ collection/ service visit, which day was this?.

Base: For each delivery asked in detail about



10am-1pm is the most popular time for deliveries. Cleaning visits are more likely to be between 4pm-10pm and waste collection before 10am

## Times of deliveries



D5. What time of day was your most recent [INSERT OPTION] delivery/ collection/ service visit?  
 Base: For each delivery asked in detail about



# The majority of visits are 30 minutes or less. The larger jobs (cleaning, maintenance and bulky deliveries) take the longest to complete

## Length of deliveries

■ Less than 10 mins    
 ■ 11 -- 30 mins    
 ■ 31 -- 60 mins    
 ■ 1 -- 2 hours    
 ■ 2 hours+



Average

44%

19%

14%

9%

8%

**Any visits most above average for that length**

**Less than 10 minutes:**  
 Personal post (84%)  
 Personal deliveries (80%)  
 Business post (78%)

**11-30 minutes**  
 Other bulky business related delivery (40%)  
 Food/ drink (34%)

**31-60 minutes:**  
 Maintenance of equipment (31%)  
 Maintenance of the building (24%)  
 IT equipment/  
 Other bulky business related delivery (both 23%)

**1-2 hours:**  
 Cleaning (33%)  
 Maintenance of the building (20%)

**2 hours+:**  
 Maintenance of the building (15%)  
 Cleaning (14%)  
 Maintenance of equipment (13%)

D6. How long did the most recent [INSERT OPTION] delivery/ collection/ service visit last?

Base: For each delivery asked in detail about



Van's are the most common mode used. Lorries are used mainly for waste collection/ bulky deliveries, and bikes mainly for professional documents

## Mode of transport used



■ Van



■ Walking only (no vehicle used)



■ Lorry



■ Car

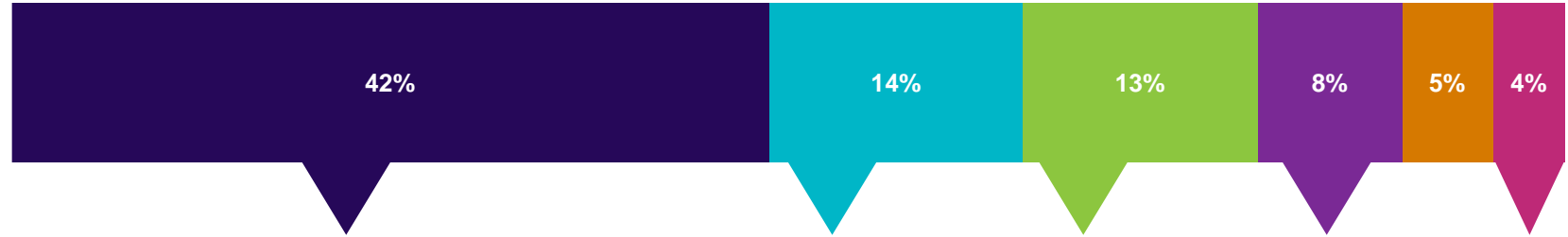


■ Motorbike



■ Bicycle

Average



Any visits most above average for that mode

### Van:

Stationery (67%)  
Food/ drink (58%)  
Personal deliveries/ IT equipment (both 57%)

### Walking only:

Personal post (35%)  
Cleaning (30%)  
Business post (28%)

### Lorry:

Other waste collection (56%)  
Paper waste collection (54%)  
Other bulky business related delivery (42%)

### Car:

Maintenance of equipment (21%)  
Cleaning (17%)  
Maintenance of the building (15%)

### Motorbike:

Professional document/ letters (16%)

### Bicycle:

Professional documents/ letter (9%)

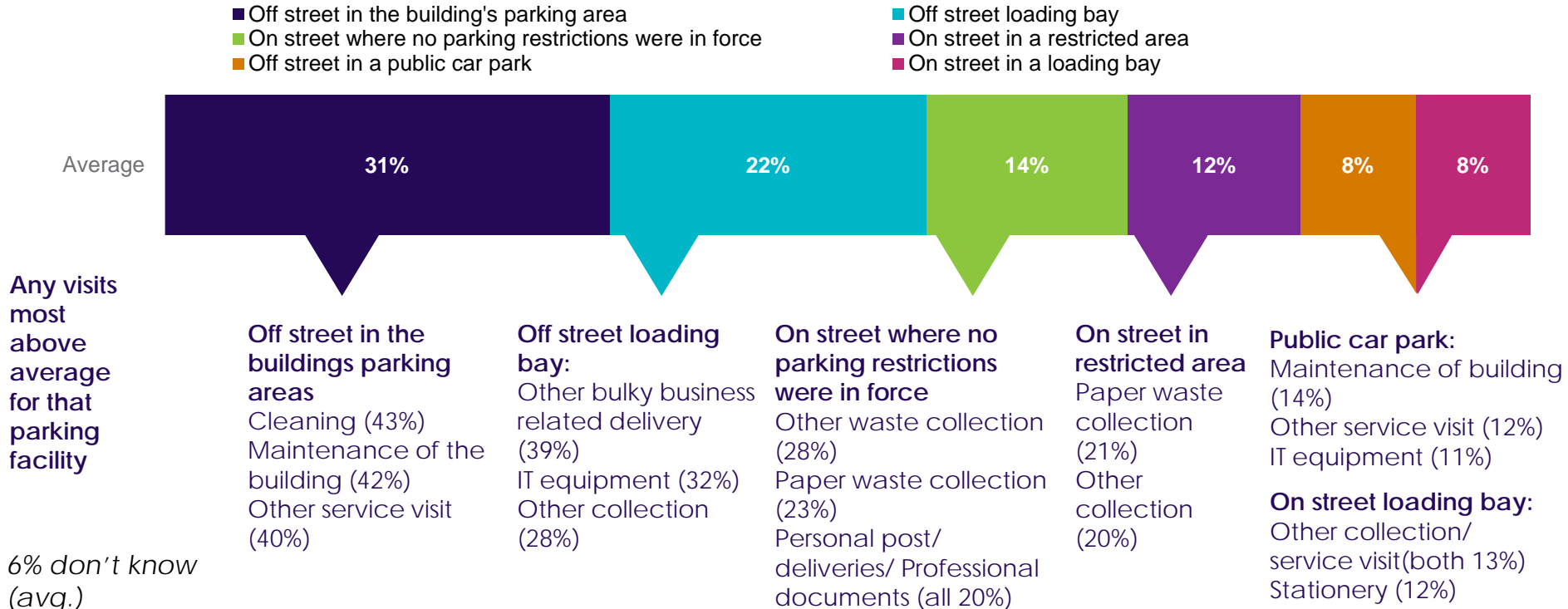
14% don't know (avg.)

D7. Which mode of transport did the person use for the most recent [INSERT OPTION] delivery/ collection/ service visit last?

Base: For each delivery asked in detail about

# Off street parking areas/ loading bays are used most frequently. Over 1 in 10 used restricted parking areas – particularly for waste collection

## Parking facilities used



D8. Thinking about the most recent [INSERT OPTION] delivery/ collection/ service visit, where did the person park?

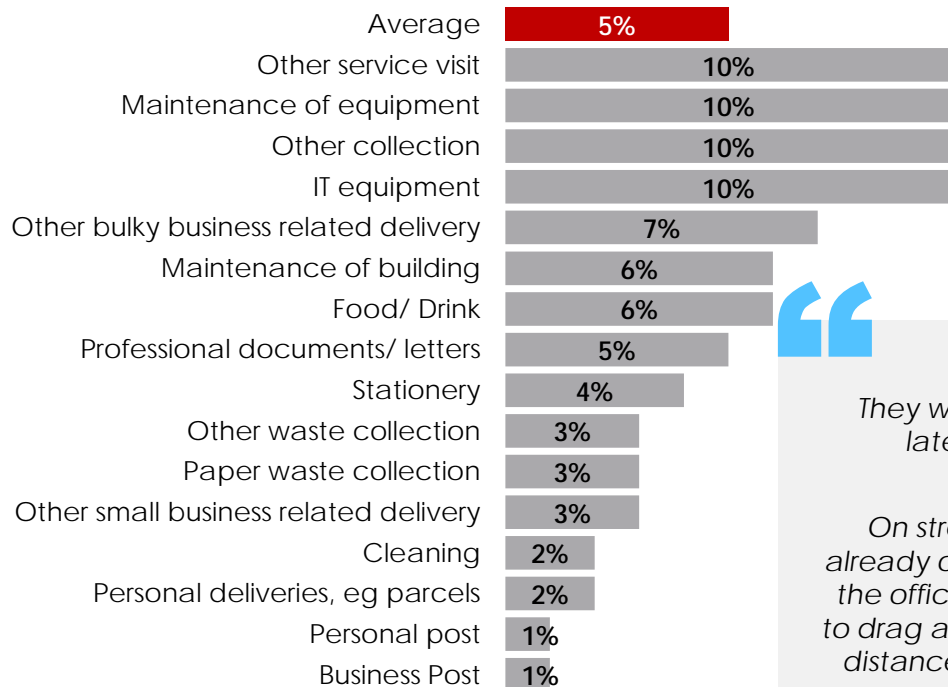
Base: For each delivery asked in detail about



# On average around 5% experience problems with visits; mainly delays and parking issues. Issues are more common with bigger/longer tasks

## Problems with deliveries

Were there any problems with your most recent delivery?



Delays and issues with parking were the main problems experienced with deliveries/ collections/ service visits



*They were 30 minutes late delivering*

*On street loading bay was already occupied , so has to use the office parking bay and has to drag all the material for a long distance and time consuming*

*Nowhere to park and they got a parking ticket within 2 minutes of parking*

*Delayed as they were unclear of the address details*

*The driver did not bring the right equipment so had to go back and bring the right IT equipment*

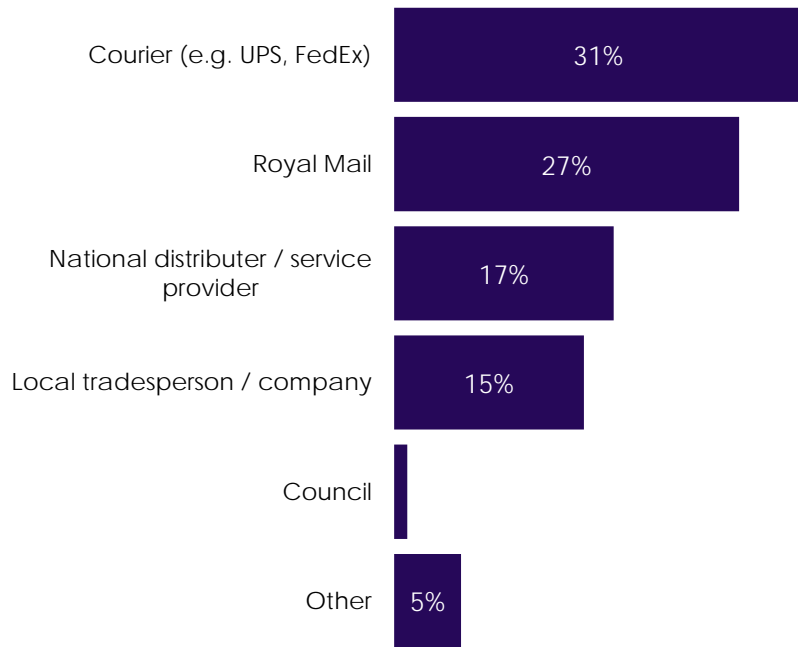


D9. Were there problems with the most recent [INSERT OPTION] delivery/ collection/ service visit? Base: For each delivery asked in detail about  
D10: What problems were there with this delivery/ collection/ service visit? Base: Those experiencing a problem

# Most deliveries are made by a Courier or the Royal Mail. The council are most likely to make a collection, followed by Royal Mail

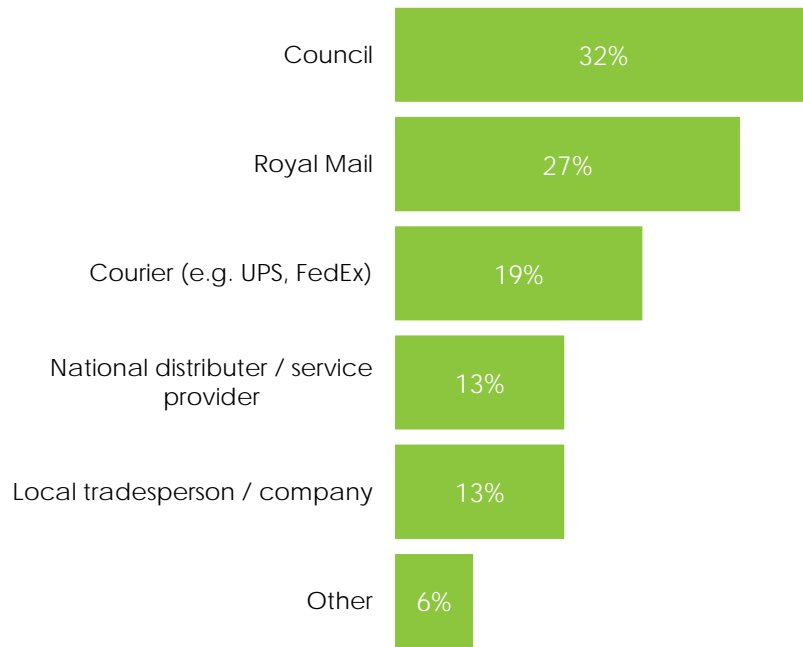
## Who made last delivery/ collection

### Who made delivery (average)



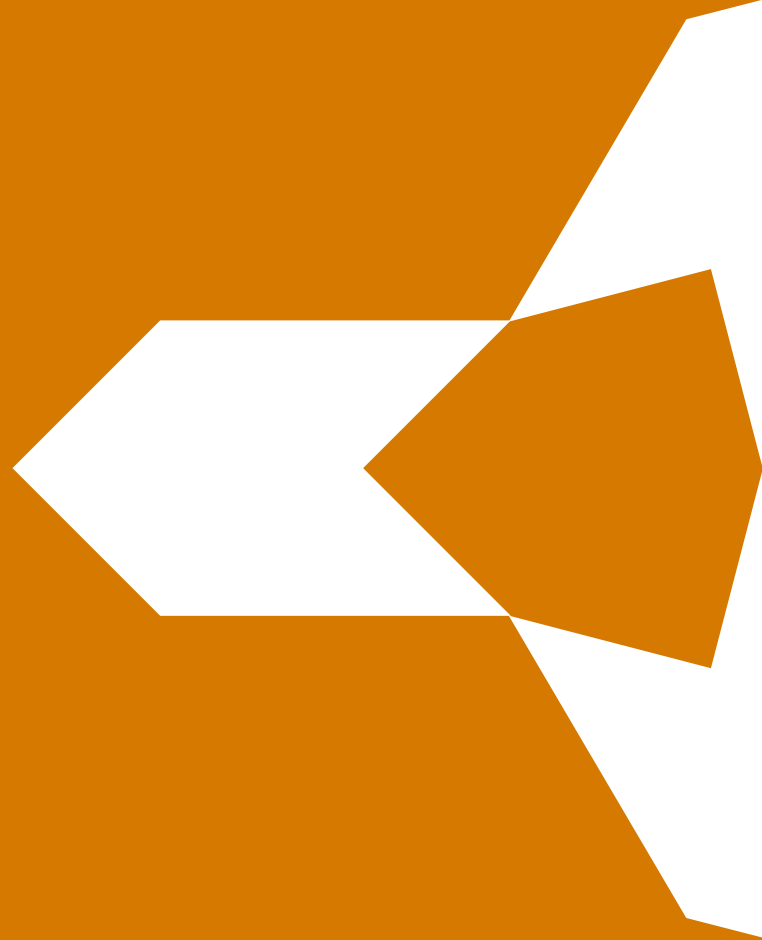
7% don't know/ can't recall (avg.)

### Who made collection (average)



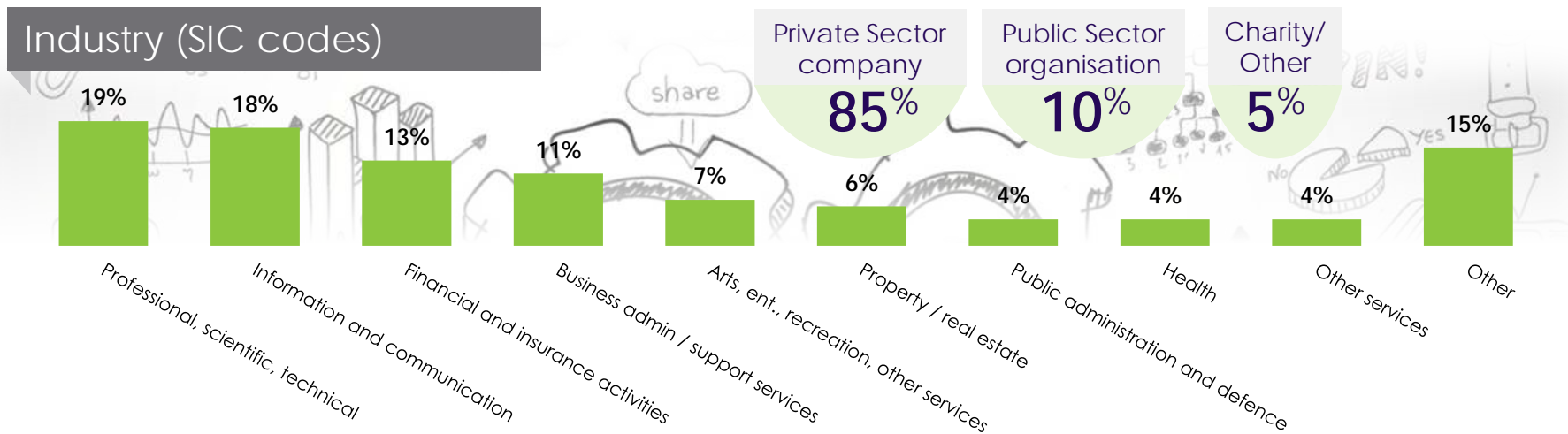
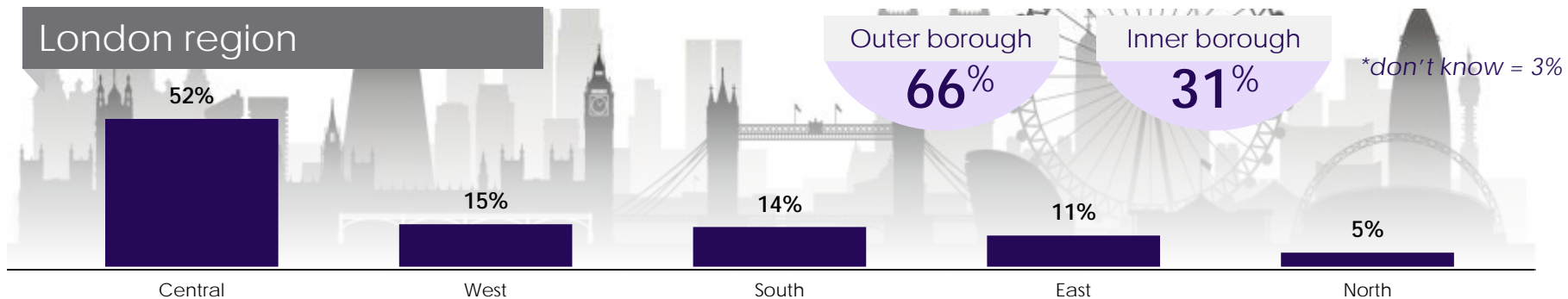
11% don't know/ can't recall (avg.)

# Appendix



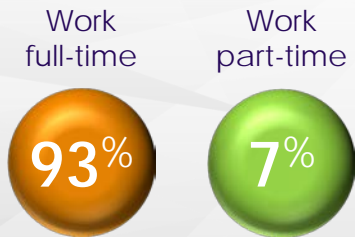


# Sample breakdown

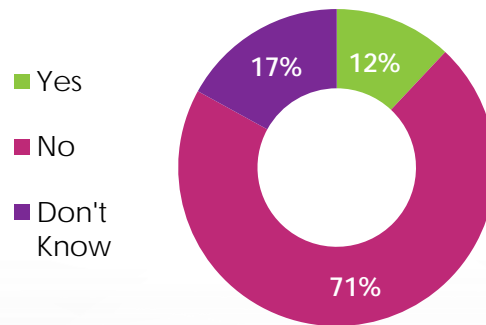


# Sample breakdown

## Job role of respondent



## Is the company/ organisation a member of the British Institute of Facilities Management?





# Around one fifth of offices are able to receive deliveries between 4pm and 10pm but are currently not doing so

## Actual delivery times vs. possible delivery times

Potential Opportunity to Receive Deliveries

+12%

+13%

+10%

+13%

+22%

+20%

Time CAN receive deliveries

10pm-6:59am

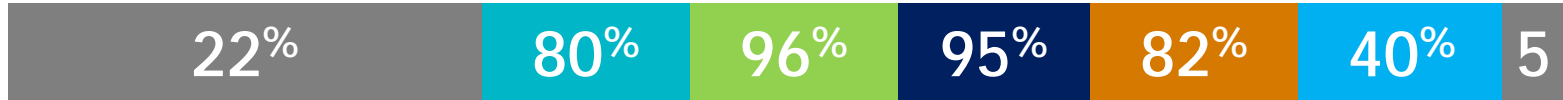
7am-9:59am

10am-12:59pm

1pm-3:59pm

4pm-6:59pm

7pm-9:59pm



% that can receive deliveries in each of these slots

Time EVER DO receive deliveries

10pm-6:59am

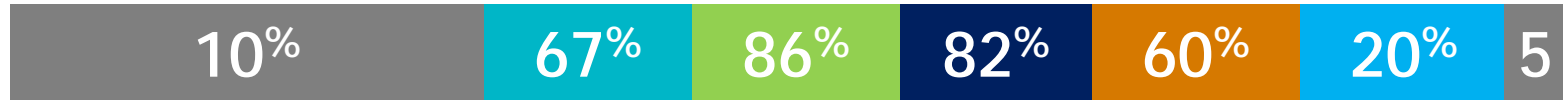
7am-9:59am

10am-12:59pm

1pm-3:59pm

4pm-6:59pm

7pm-9:59pm



% that do receive deliveries in each of these slots

O5c: Is possible to receive deliveries, collections, service visits at these times? Base: Total sample (n=1,293)

O5b. Using the time slots below, please type the % breakdown of deliveries which generally happen within each time slot. Base: rebased on total sample (n=1,293)



# Sample breakdown

## Company size

Large business (250+ employees)	15%	
Medium business (50-249 employees)	25%	
Small business (1-49 employees)	59%	

## Building size

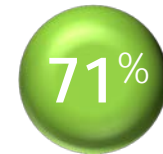
Large building (20,000 sq metres+)	5%	
Medium building (1000-19,999 sq metres)	33%	
Small building (up to 999 sq metres)	51%	

London = 3.2

UK overall (including London) = 4.5



YES it's the only head office



YES it's one of the head offices



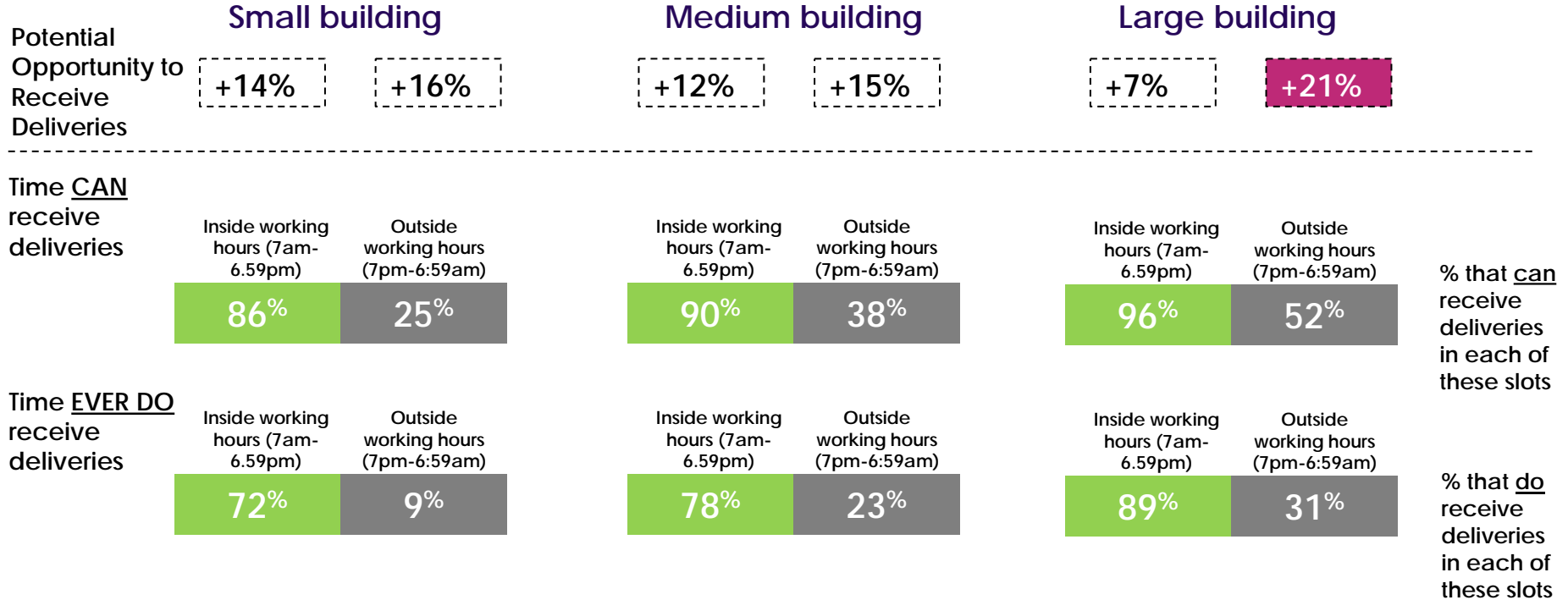
NO it's not the head office





# Just under 1 in 7 of those that can receive deliveries inside/ outside working hours currently do not

## Actual delivery times vs. possible delivery times



O5c: Is possible to receive deliveries, collections, service visits at these times?

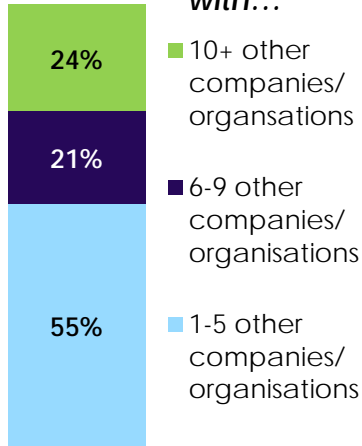
O5b: Using the time slots below, please type the % breakdown of deliveries which generally happen within each time slot.

# Nearly half share their building with another company/ organisation – 6 in 10 of these have a shared reception

47% of offices share their building with 1 or more other companies

Mean = 8.2 other companies/ organisations

Share with...



60% have a shared reception for the whole building

**Buildings with more offices are more likely to have a shared reception**

1-5 other companies/ organisations	6-9	10+
49%	68%	78%

41% have a central procurement system for the whole building



Handled by...



Thank you

