

# Purolator Predicts: Shaping the Future of Delivery







# Introduction

When thinking about the future of delivery, it's easy to imagine that some of the concepts are far-fetched or straight out of science fiction. For those who are content to stick with the status quo, these "out there" ideas might even be unsettling. In the not-so-distant future, we may look up into the sky and see delivery drones flying by or have our parcels delivered by robots. Before we look too far ahead, let's step back and remember the delivery processes that were available a mere few decades ago.

E-commerce brought delivery efficiency, convenience and speed to the forefront of innovation. But, back in the '90s there was a lack of transit visibility and inconsistent delivery time, spanning around 4-8 weeks. And consumers were okay with that being the norm. Fast-forward to today and we're no longer waiting 4-8 weeks for packages. We're presented

with convenient A-B options at e-checkouts such as next-day delivery. Nowadays, we expect these options, which makes it easier to wrap our heads around the innovations we're about to discuss. Who knows what the future brings? Only time and technology will tell.

In this report, we discuss the following questions:

- ✓ What's shaping the changes to consumer expectations?
- ✓ How are businesses keeping up?
- ✓ What's still to come in the future of delivery?



# What is shaping the change? The shifting expectations of consumers and businesses

The shifting expectations of customers continue to disrupt supply chain processes. Our deliveries must be more convenient and streamlined. No matter how many times we speed up deliveries or add automation to supply chains, these requests stay consistent across all B2X verticals. The demand for fast delivery is not just limited to small retail items. The Head of Supply Chain at Wayfair predicts consumers may expect same-day furniture deliveries in the near future.<sup>1</sup> However, let's take a step back – beyond consumer expectations, what's driving their need for change? Leading online retailers have set

the requirements for innovation when it comes to competing in e-commerce, and consumers and businesses alike are empowered (and somewhat dictated) by the internet of things (IoT) and social media. Forget sifting through newspapers and catalogues. Convenience and instant gratification have built today's world. Push notifications and phone alerts broadcast personalized notifications in real-time, with no obvious cost attached. Consumers have become so used to the way information is delivered, they expect tangible online purchases to be delivered similarly.

## The effects of COVID-19 on expectations and delivery

You can't talk about the future of delivery without acknowledging the global pandemic that struck in 2020. Brick-and-mortar stores in Canada and beyond were forced to close their businesses. They had to offer curbside pick-up or online sales to have any chance of staying afloat. As people sheltered in place, they still needed to purchase essentials like groceries, and convenience items like books and clothes. Quickly, e-commerce became more than just an option, but a mandatory service, causing a surge of demand on the supply chain.

According to Statistics Canada<sup>2</sup>, retail e-commerce sales reached a record \$3.9 billion in May 2020 in Canada, which was a 99.3 % increase over February 2020 and a 110.8 % increase compared with May 2019. While there is a light at the end of the tunnel with the introduction of a vaccine, the prevalence of e-commerce isn't going anywhere. Chances are that when restrictions are lifted, customers who were adjusting to a "new normal" will still have some anxiety about shopping in-person, meaning shipping will remain as important as ever. In fact, it's predicted that global e-commerce sales in Canada alone will reach a record \$58.54 billion in 2021.<sup>3</sup> Its trajectory will depend on the continued online experience — including whether or not they get their deliveries on time.



# So, what do consumers want?

Pandemic or not, customers want their deliveries to be **fast, cheap, personalized** and **visible**. The specific requirements of these measures are fluid and ever-changing. Here are some of the most up-to-date expectations that shape the future of delivery:

## Fast shipping

"Fast-and-free" shipping is the number one driver for consumer purchases – and has been for the last five years. While the features are desirable as a pair, there's a growing demand for almost "instant" deliveries. This trend opens the market for more spontaneous purchases, with less buyer's remorse. There's also the convenience of an instant delivery that surpasses an attached cost. Currently, the trend of instant delivery is often fuelled by urgency in the commercial/ industrial space. [Important documents couriered](#) from building to building, and medicine from hospital to hospital. But the trend is shifting to personal deliveries, too. According to a recent study, 92% of consumers want to see free, faster shipping as an option.<sup>4</sup> The expectations don't stop there: 55% of consumers say that a two-hour delivery option would increase their [brand loyalty](#).<sup>5</sup> In any event, a U.S. report states the same-day delivery market is projected to be valued at \$9.6B in 2022 – more than doubling in size from 2018.<sup>6</sup>

## "Cheap" or free shipping

For deliveries that aren't time-sensitive, the price still generally outweighs the speed of delivery. In the catalogue/early digital era, [free shipping](#) wasn't common practice and consumers were used to adding shipping costs to the total. Nowadays, 50% of consumers pick their delivery options based on the overall price (item + shipping), instead of the amount of time it takes. For some, totally free shipping is more lucrative than the product price itself. 34% of consumers look for fast-and-free delivery, even if it means paying more for the item.<sup>4</sup>

## Personalized

Today's consumers are busy people and seem to be getting busier. Technology makes it easier to keep lifestyles as productive as possible, and time is precious. With this in mind, consumers expect delivery services to adhere to their schedules, not vice versa. Consumers no longer feel it necessary to have to wait at home for a package. Businesses are providing [more delivery choices for a personalized experience](#) to benefit everyone. It's not uncommon to have at least three delivery timeframes, and some even have guaranteed 1-or-2-hour delivery windows. Many businesses allow personalized delivery instructions, such as "leave on the porch" or "call # when you arrive". This kind of personalization is increasingly important to keep up with convenience. Over 33% of online shoppers admit they avoid having their orders shipped to their homes because of the anxiety of not being able to receive them. In fact, more than half of shoppers would pay a premium for an evening or weekend delivery when they know they'll be home to sign for it.<sup>7</sup>

## Visible

Consumers want control over their delivery by receiving continual verification of its status and location. And, it's not only selective consumers who want this – 93% want to receive updates on their order throughout its journey.<sup>8</sup> Businesses need to provide clear visibility, even when the consumer didn't ask for it. It sends a clear signal that they care about their reliability as much as the consumer does. Many delivery providers offer options like [detailed SMS notifications](#). These can update recipients when the package has been picked up, while it's on-route and once it's been safely delivered. In addition, they no longer have to physically sign for a package, meaning they don't even need to be home for the delivery due to options like [remote signature release](#) (waiving the need to sign for a package). The amount of visibility also matters; the status of a package can no longer just be "shipped" until it reaches the recipient. An insufficient level of visibility will impact future sales and [brand loyalty](#). 47% of consumers won't order again from a brand that provides poor delivery visibility.<sup>9</sup>



**Free shipping should benefit your business, not just your customers. Read our article and learn how and [get the most out of providing free shipping](#).**



## The rise of e-commerce = the rapid rise of returns

The convenience of e-commerce accounts for many additional sales, but it also creates a swell in the number of returns. More consumers are using fast and cheap shipping to spontaneously buy multiple items to try on and compare products before returning the ones they don't want. Their expectations aren't to keep everything they purchase. Returns to a store can be costly, but factoring in return logistics only adds to the expense. Statista estimated U.S. return deliveries cost \$550 billion in 2020, which is 75.2% more than four years ago.<sup>10</sup> But a generous return policy is worth it, in the long run, to stay competitive. 90% of consumers "highly value" free returns and 62% "would buy again" from a business that offers free returns or exchanges.<sup>11</sup> In order to keep up with the competition, businesses need to provide consumers with e-commerce experiences that are comparable to browsing in-store.



Learn more about [return shipping best practices](#) in our article.



# How are businesses keeping up? Finding new ways to stand out from the crowd

Over recent years, businesses have become more adaptive and proactive to changes shaped by consumer habits. With the bar always rising, how are businesses shifting their services to upkeep their presence and innovation?

## Using crowdsourced delivery models is one way...

Instant gratification isn't going anywhere in the e-commerce space. So, neither is the need for quicker delivery. According to McKinsey, same-day delivery options will account for about 25% of consumer deliveries by 2025.<sup>12</sup> Thus, feeding consumers' desire to shop (and receive deliveries) around the clock. Businesses' delivery models need real-time scalability, handling fluctuations without impacting the bottom line. In a recent shift, [crowdsourced deliveries](#) have broken away from the confines of the restaurant industry. There is more and more prevalence in the retail and CPG [consumer packaged goods] space – and beyond. So far, utilizing local couriers can be a way to deliver fast, but they often lack assets and the supply chain skill set of premium couriers.

## ...but will crowdsourced deliveries make it into the future?

In urban centres, it's hard to go a block without spotting a crowdsourced delivery service. Though in the future, their current state looks uncertain. We can see some of the downfalls from Uber's attempt at a delivery-only service, UberRUSH (operating 2014-2018). The model failed due to unpredictable demand and associated costs. It costs around as much as their ride share service to transport a package. There is a silver lining though. These crowdsourced services have an opportunity to adapt by shifting their focus away from drivers. It's predicted that the IT platforms that match transport requests and collect fast feedback will continue to be a valuable model. Though, advancing artificial intelligence (AI) means services could become automated, such as replacing local couriers with autonomous vehicles (self-driving vehicles).



Find out more about the future of what crowdsourced deliveries could become, along with other [shipping trends for the next 100 years](#).

## Providing an omnichannel experience...

Within the last decade, the way people shop has evolved dramatically. The consumer buying decision is now more omnichannel than ever before. In fact, of 46,000 shoppers surveyed, 73% use multiple channels during their shopping journey.<sup>13</sup> Progressing technology can track processes in a central hub. So, businesses are expanding their intricate web of online/offline sales tactics. While most purchases are still made in-store, 45% of survey respondents said they had purchased from a brand website in the last six months. And, while brick-and-mortar stores are continuing to reopen amid limitations, there's more to the story. Nowadays, consumers are hyper-connected to their prospective purchases. They will take the time to do some heavy research before handing over money. Over a third of consumers will visit a brand's website, read customer reviews and/or attempt an online price match first.<sup>14</sup> In short, businesses have to pass through many e-checkpoints before finalizing a sale, even in-store.

### 1. Product Awareness

Customers first become aware of the brand and product through different marketing channels.

- In-store
- Online
- Mailed promotions
- Word of mouth
- Mobile ads

### 2. Research

Interested shoppers research the product and business to decide whether it's right for them.

- Search engines
- Reading reviews on the product and brand
- Querying in-store
- Viewing the brand's social media pages

### 3. Purchase

Depending on their channel of choice, customers will make their purchase.

- Through a brand's website
- On a personal mobile device
- In-store checkout
- Self-checkout kiosk

### 4. Delivery

While home deliveries are popular, consumers may request to ship packages elsewhere.

- To a home address
- To a work address
- In-store pick-up
- Parcel lockers
- Alternative pick-up location

### 5. Post-Purchase

Customers continue to evaluate the brand. Their overall purchase satisfaction influences [brand loyalty](#).

- Flexible return policy
- General customer support
- Providing reviews on their experience via online channels, phone or in-store



## ... but how does omnichannel consumer behaviour affect a supply chain?

With so much information exposed online, businesses have had to make "saving the sale" as easy as they can. Otherwise, a consumer may soon find an alternative, using the same online tactics that vetted the sale in the first place. Items must be available almost instantly, whether in stock or not. Businesses are shifting inventory from warehouses, distribution centres and stores, to other stores, customer addresses and warehouses. There's no longer a one-way supply chain. Managing inventory at a granular scale is required to succeed with these new fulfillment experiences, too. For example, if local stores ship the majority of units to enable faster home delivery, the supply chain must quickly replenish in-store inventories. To keep deliveries in-sync, and supply chains running, the future of [omnichannel optimization](#) is likely in the eyes of robots. Quite literally. There are consistent advancements in visibility across all internal operations. But soon, consumers will also be able to see in real-time stock levels, too. Automated robots in development will keep a tally of in-store and warehouse stock at double the efficiency of a human employee. With real-time information, notifications can inform a consumer if a product is available for pick-up or delivery.



**Learn how to master your omnichannel strategy with your delivery provider**



## Eco-friendly solutions...

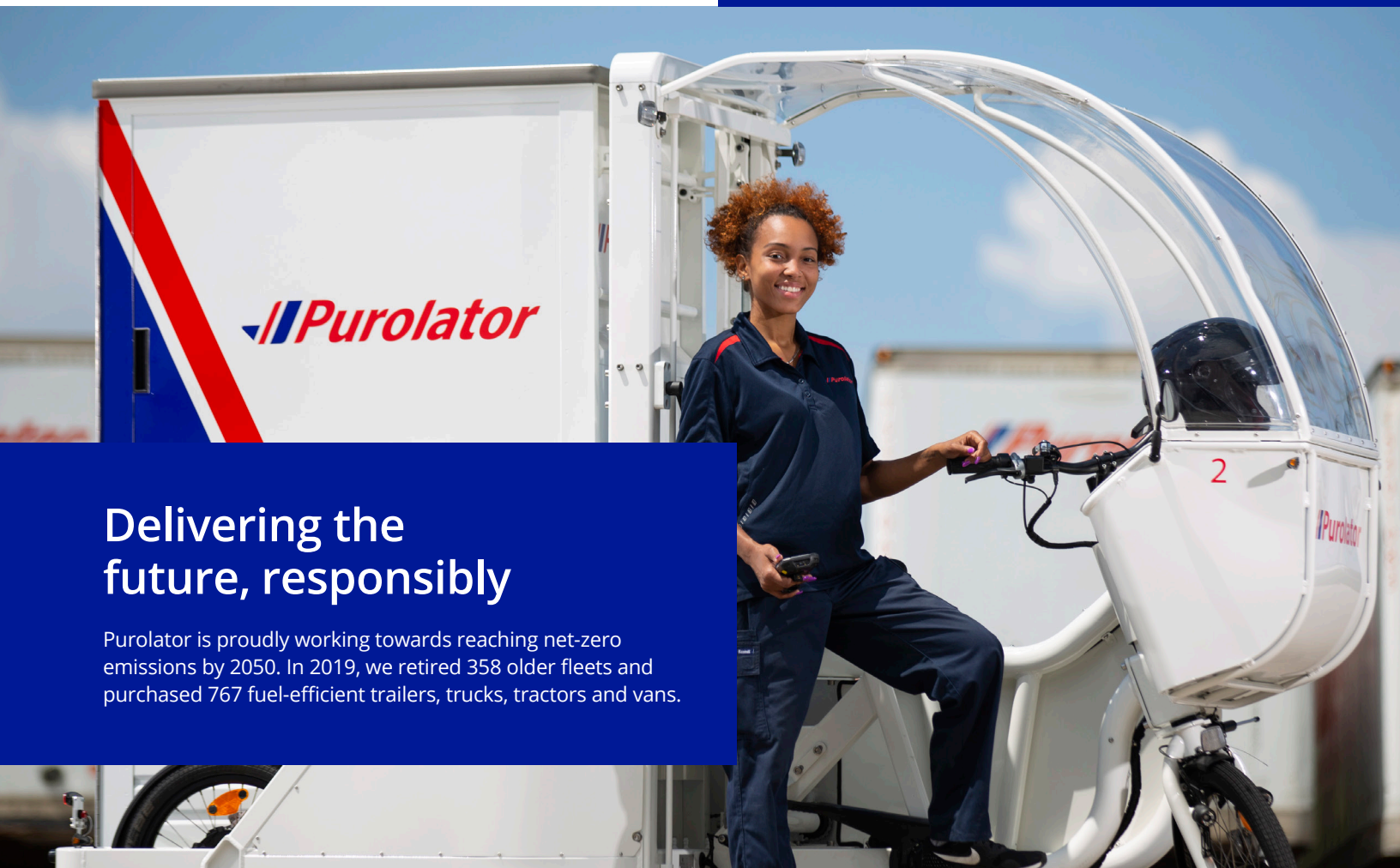
Currently, we're in the middle of two movements in consumer behaviour, which in some ways work against each other. Consumers care about sustainability, and there's increasing awareness and importance of global issues. A study by IBM found that 70% of consumers are willing to pay an added premium of 35% more per upfront cost for sustainable purchases, such as recycled or eco-friendly goods. Furthermore, 57% of them are even willing to change their purchasing habits to help reduce negative environmental impact.<sup>15</sup> Consumers care that businesses care, too. Currently, 57% of consumers will blacklist brands that don't evidently share the same social beliefs.<sup>16</sup> While sustainability is important, more consumers are utilizing e-commerce and fast deliveries. Keeping up with the influx of e-commerce isn't enough for consumer satisfaction. Sustainable practices are an important contributor to business success in today's market space.

## ...but what are delivery providers doing to assist in the sustainability of our environment?

Delivery providers are currently developing technologies and trials for low-carbon vehicles and fuel. Sometime soon, we can expect to see commissioned fleets of electric vehicles, including full-size trucks. In more urbanized areas, **e-bikes are already delivering** certain products in place of traditional cargo vans. E-bikes deliver a limited number of products at once, but come with a unique perk – they navigate cities much quicker. They can surpass the drop-offs of a van in an urban location, as they aren't susceptible to traffic jams. Real-time tracking technology will continue to improve journey efficiency. In turn, benefiting environmental aspects and business costs. Global positioning systems (GPS) assist the routes of fleets of trucks and autonomous vehicles. They track traffic and suggest alternative routes to stay on schedule and avoid unnecessary fuel use. Such systems also track drivers' speeds, which benefits the environment and the business. By limiting speed to 100kph, a truck can save as much as 15% in fuel expenses.

## Delivering the future, responsibly

Purolator is proudly working towards reaching net-zero emissions by 2050. In 2019, we retired 358 older fleets and purchased 767 fuel-efficient trailers, trucks, tractors and vans.





# What is still to come? The autonomous future of delivery

According to some predictions, there are two delivery models we may use more – drones and autonomous vehicles. Instead of human interaction, autonomous delivery vehicles and drones could be responsible for the more deliveries. Surprisingly, it's not just the researchers that believe this. A recent survey showed that 65% of Americans think [robots and drones](#) will be making most city deliveries by 2037.<sup>17</sup> Though, other predictions

recognize that without human interaction, there would be major setbacks, regardless of the advancement in automation in the next 20 years. Plus, in a contradicting survey, 43% of Americans revealed they don't feel safe around autonomous vehicles. So what do we predict will be the future of the way we deliver?

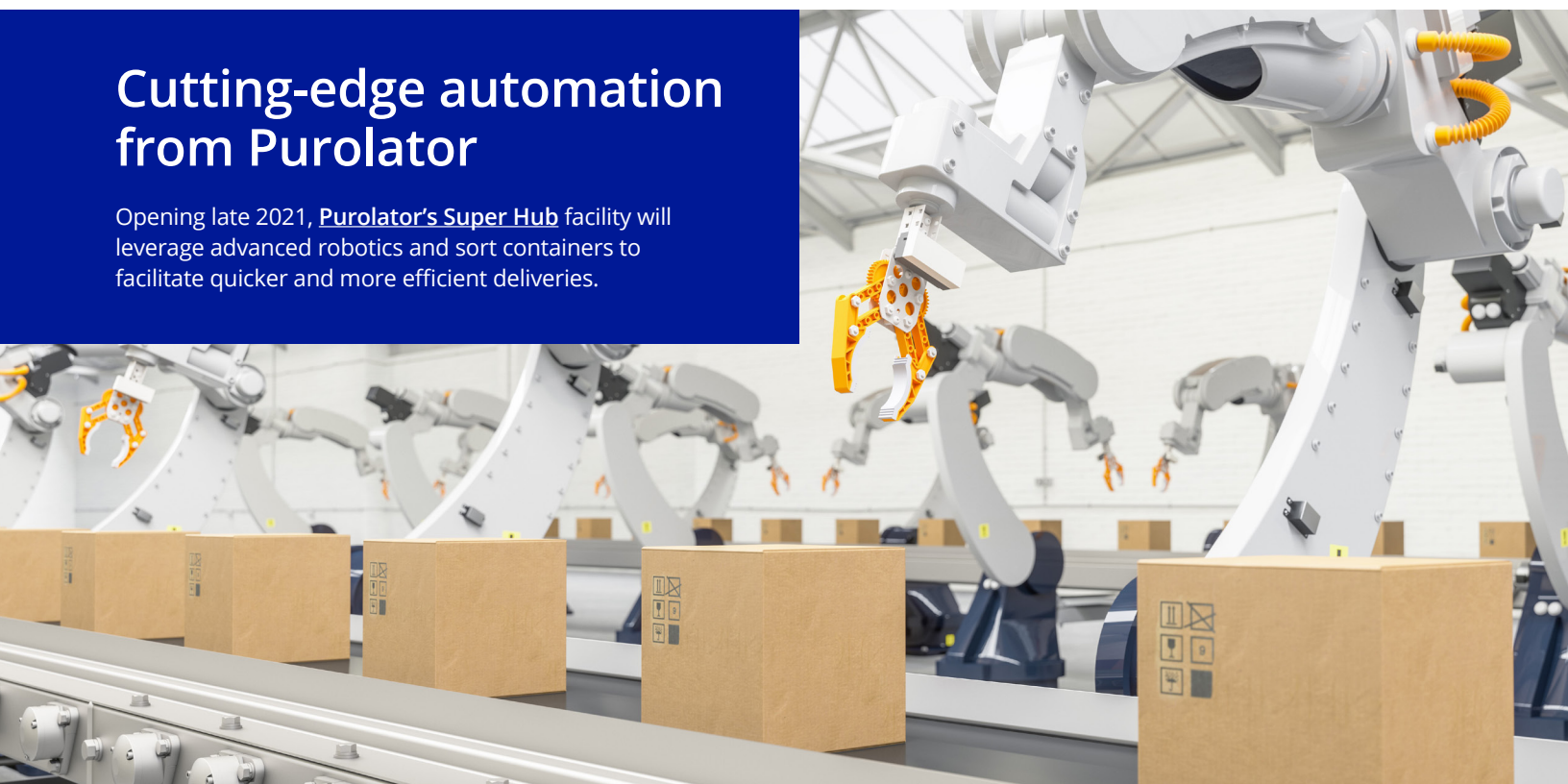
## Warehouses operated by robots

Our supply chains are now closer to being a supply web. Technology makes our world smaller, but it's also creating a complex global supply chain, and will continue to do so. We are starting to expect transparency and visibility in every step of the process, whether we are a distributor, supplier or customer. One of the ongoing advancements of optimization is further automating supply chain processes. The focus is to reduce the distance required by human warehouse workers to find and collect an item within a large warehouse. There are a few examples of robots deployed to bring the shelf stacks to human employees. These robots can travel many kilometres a day, at speeds quicker than a human can walk – and they don't need breaks.

Currently, deploying collaborative robots instead of using “warehouse pickers” is a costly investment. While collaborative robots accounted for less than 5% of global industrial robot sales in 2016, it's predicted that the collaborative robots market could surge to more than \$12B USD by 2025.<sup>18</sup> But many warehouses can't be easily navigated by these robots – due to their age, previous use or floor plan based on human use. Though with the rise and certainty of e-commerce, businesses will need to move to (or build) to spaces where automation can be easily integrated. The most advanced example of what's to come is currently sitting in a 40,000 sq ft facility in China.<sup>19</sup> An e-commerce giant recently opened the world's first fully automated warehouse. The warehouse is operated solely by robots. This means that robots have taken over tasks such as packing, lifting and transporting packages to loading docks. Expect many warehouses of the future to follow this model.

## Cutting-edge automation from Purolator

Opening late 2021, [Purolator's Super Hub](#) facility will leverage advanced robotics and sort containers to facilitate quicker and more efficient deliveries.



## Smart front doors to take your delivery for you

An autonomous supply chain adheres to many of the expectations of the future. But, what about the final step in the last mile? To get your delivery through your front door, someone needs to be home to take it inside. Innovative alternatives are starting to create safe ways to get a package inside a home without this requirement. Smart locks allow customers to use Bluetooth and wifi to remotely control a door lock, but that still creates a security risk. LG has created a revolutionary concept. A front door that scans your face and palm to allow you access. For deliveries though, there are two side compartments that can securely be accessed from outside and inside the home. This creates an ultimately safe and convenient delivery, but it's a concept that's yet to be made publically available.<sup>21</sup>

## Drones

Delivering packages by drones could address some of today's transportation challenges. Traffic delays, labour costs and uncertain ETAs could be minimized through autonomous flight. Though there's a lot of talk about the progression of drones, they're predominantly used for other reasons. For example, to carry light cameras and sensors for surveillance, military use and filming.

Delivery is a work in progress – in the U.S., UPS has piloted drone deliveries with CVS in specific markets, and Amazon and Walmart have also piloted their own drone services. But do we think they will make it to market soon? According to research from 2016, it was predicted that autonomous vehicles (including drones) will account for 80% of deliveries by 2026.<sup>22</sup> In addition, the Global Autonomous Delivery Vehicles Market is projected to be valued at an impressive \$24.73B USD by 2027.<sup>23</sup> However, some of the biggest limitations in drone delivery are its capabilities, such as the size and weight it can physically carry. The amount of time a drone can remain airborne is still being worked on. Even with the current progression of developing drones fit for delivery, they aren't able to fly for a far distance quite yet. One workaround (which may become common practice) is using mini-helipads on top of delivery vehicles. Firstly, the drones and packages would be

transported to a centralized location via a (potentially autonomous) ground vehicle. Then, the drones would take the packages on the final stretch of a journey, where the routes are personalized for each end-destination.

There are already strict regulations around drone use, but there's likely to be a lot more scrutiny for delivery drones over the coming years. In urban areas, drone use will remain heavily regulated due to the liability and safety hazards of flying above people, animals, buildings and cars with heavy items.

Once drones have been optimized in terms of their capacity, in-flight longevity and their overall safety, it's expected they will transform the delivery experience for a lot of remote areas. Traditionally in remote areas, ground vehicles have to navigate lengthy (and sometimes complex) journeys for only a few drop offs – not very efficient in terms of costs and the environmental impact. As drones can travel at high speeds (some surpassing 120kph) and can take a direct route, they may soon be relied upon for faster and cheaper rural deliveries. This could allow for rural recipients to utilize the same delivery services available in more built up areas.





## Autonomous vehicles with parcel lockers

“Autonomous vehicles” is a holistic term for a driverless vehicle. It encompasses any mode of transport controlled remotely, or automatically. The autonomous last-mile delivery market is projected to generate \$91.5B USD by 2030 – that’s over seven times greater than in 2019.<sup>20</sup> A prevalent concept for an automated delivery vehicle is a “moving parcel locker” – which is essentially a self-driving ground vehicle equipped with parcel lockers. The recipient would get an alert when the vehicle is at the destination and receive a code that can only open the locker holding their package.

Moving parcel lockers would easily reduce the number of missed deliveries. Currently, when a package isn’t delivered the first time around, it’s inconvenient for the consumer and costly for the delivery provider. Autonomous vehicles could park after hours, serving as stationary lockers for packages. This would mean consumers could pick up items at a more convenient time, such as after work. Purolator currently has a driven version of this model – our Purolator Quick Stop trucks allow for recipients to collect their delivery from a convenient [location](#), such as a train station or central point to the neighbourhood.

While these moving parcel lockers may sound ideal, the autonomous vehicle industry continues to face skepticism from society. While autonomous vehicles are expected to be extremely safe (it’s predicted they could prevent 75-90% of auto accidents) many people are not comfortable driving in, or alongside a driverless vehicle. Plus, factors such as their security, legislation, cost and even the impact on millions of jobs will have to be addressed before driverless cars are commonplace on our roads. Within the delivery sector, autonomous vehicles will lack one essential asset – the delivery driver. There are many instances where a package will need to be delivered with some form of human element. For instance, packages that are fragile, heavy or need installation will require a human worker to deliver the item directly to the recipient. Moreover, many recipients used to traditional deliveries may be left at a disadvantage if they’re unable to interact with an autonomous vehicle.

## In the future, the bar will only get higher

It’s an interesting time to be discussing the future of deliveries. In the last year, COVID-19 caused the majority of travel to come to a standstill, and it quickly became public knowledge how important a strong supply chain was to keep shelves stocked. It also caused a huge reliance on e-commerce deliveries, pushing customer demand higher than ever. The need to optimize our supply chain has never been greater.

Businesses are continuing to adapt to changes shaped by consumer habits. As customers increasingly use multiple channels during their shopping journey, businesses are adapting to provide an [omnichannel experience](#). Businesses must work with delivery partners to shift inventory from warehouses, distribution centres and stores, to other stores, customer addresses and warehouses – quickly and seamlessly. Sustainable practices such as utilizing urban e-bikes and efficient GPS planning are also gaining prevalence – not only to promote a healthier future, but also to adhere to an increasing consumer demand for eco-friendly purchases.

Many technological advancements are at the forefront of becoming an ordinary part of tomorrow’s supply chain. Automation both in-transit and within warehouses will help to meet growing customer expectations of a speedy delivery and support a more efficient network. Working alongside human workers, rather than in place of them, will provide a seamless supply chain without being limited to the set functions of automated services.

Ultimately, customers want their deliveries to be fast, cheap, personalized and visible. The bottom line is this: if your business’ future is to include delivery, choose a delivery partner who will help you stay in line with – and even ahead of – ever-increasing customer expectations.

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