

WHAT'S IN THE REPORT

- ➔ The consumer delivery shift
- ➔ 6 consumer demands for parcel carriers
- ➔ 6 supply chain failure points to fix
- ➔ Exclusive consumer data across 4 major markets

THE CONSUMER VERDICT

THE GAP BETWEEN CONSUMER
EXPECTATIONS AND PARCEL
CARRIER DELIVERY

Introduction

Consumer expectations for parcel delivery have evolved dramatically. Parcel carriers aren’t just moving boxes anymore. They are being judged – relentlessly – by consumers who care more about the experience than the carrier logo on the van.

New research conducted by Avery Dennison among 5,000 consumers in the US, UK, France, and Germany reveals a rapidly rising demand for speed, precision, and control in e-commerce delivery.

Key findings



4/10

Four out of ten consumers now expect home delivery within a scheduled 2–3 hour time slot, rising to 43% in the US and 44% in the UK.



61%

More than half are willing to pay a premium for enhanced parcel tracking.



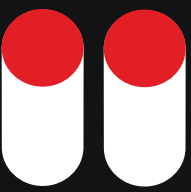
54%

Transparency and reassurance are as important as speed. 54% say tracking helps them plan their day, and another 54% say it gives them peace of mind.



37%

The top consumer frustration is delivery delays.



It's clear from the data that consumers are increasingly focused on predictability when it comes to receiving their parcels.



JULIE VARGAS
Vice President and General Manager
Avery Dennison, Identification Solutions



A shift toward greater control

Research Methodology**
Commissioned by: Avery Dennison
Conducted by: Opinion Matters
Sample: 5,000 verified online shoppers across the United States, United Kingdom, France, and Germany.
Study Type: Independent quantitative and behavioral survey focused on delivery experience, tracking, returns, and expectations for non-food ecommerce. Respondents span age groups, purchasing frequencies, and income levels.

This research confirms a clear trend: consumers no longer tolerate uncertainty. They expect flexible delivery options, accurate delivery times, and the ability to track their orders in real time. This adds to the existing pressure on parcel carriers to meet rising service expectations while simultaneously reducing costs. The message is urgent: carriers must innovate to offer a new paradigm of performance or risk losing business and credibility.

“The message from consumers is loud and clear: they expect precision and control over their deliveries,” says Julie Vargas, vice president and general manager of Identification Solutions at Avery Dennison. “Customers may tolerate delays — but only if they're kept in the loop. Real-time visibility shouldn’t be considered a luxury anymore; it's the price of staying competitive. Retailers and carriers who embrace transparency will not only ease frustrations around

shipping delays and rising costs, they'll earn lasting customer trust in a tough logistics climate.”

This expands on recent studies in North America by McKinsey revealing the shifting expectations of consumers, and the impact of the delivery moment as a brand moment.



Parcel carriers who rise to meet this challenge will become essential partners in the modern commerce ecosystem. This is the state of play.

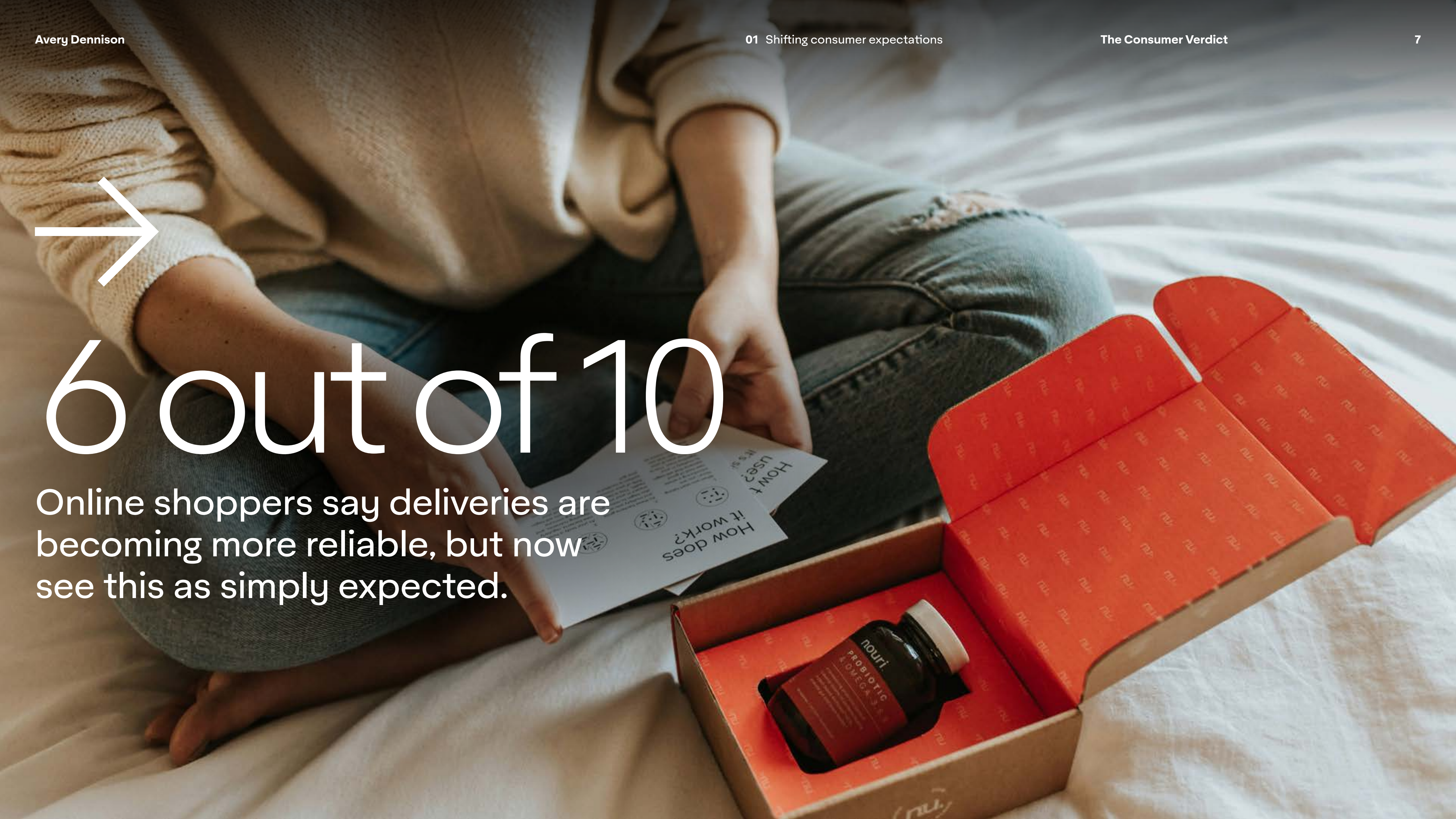
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Shifting consumer expectations



6 out of 10

Online shoppers say deliveries are becoming more reliable, but now see this as simply expected.



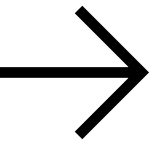
Evolution of delivery window expectations 2015 - 2025



Predictability beats speed

Ten years ago, consumers expected **unpredictability**. Today, anything less than seamless, consistent delivery feels like a glitch in the matrix.

There was a time when a parcel arriving on the expected day felt like a pleasant surprise - "it's here!". Now reliability is assumed. The focus has shifted to how flexible, clear, and emotionally satisfying the experience is from the moment someone clicks 'buy', to the parcel being received.



It's less about raw speed and more about **predictable deliveries that arrive within a specific time slot.**

And consumers say they are willing to pay for it.

*"I DON'T MIND PAYING
FOR PEACE OF MIND!"*

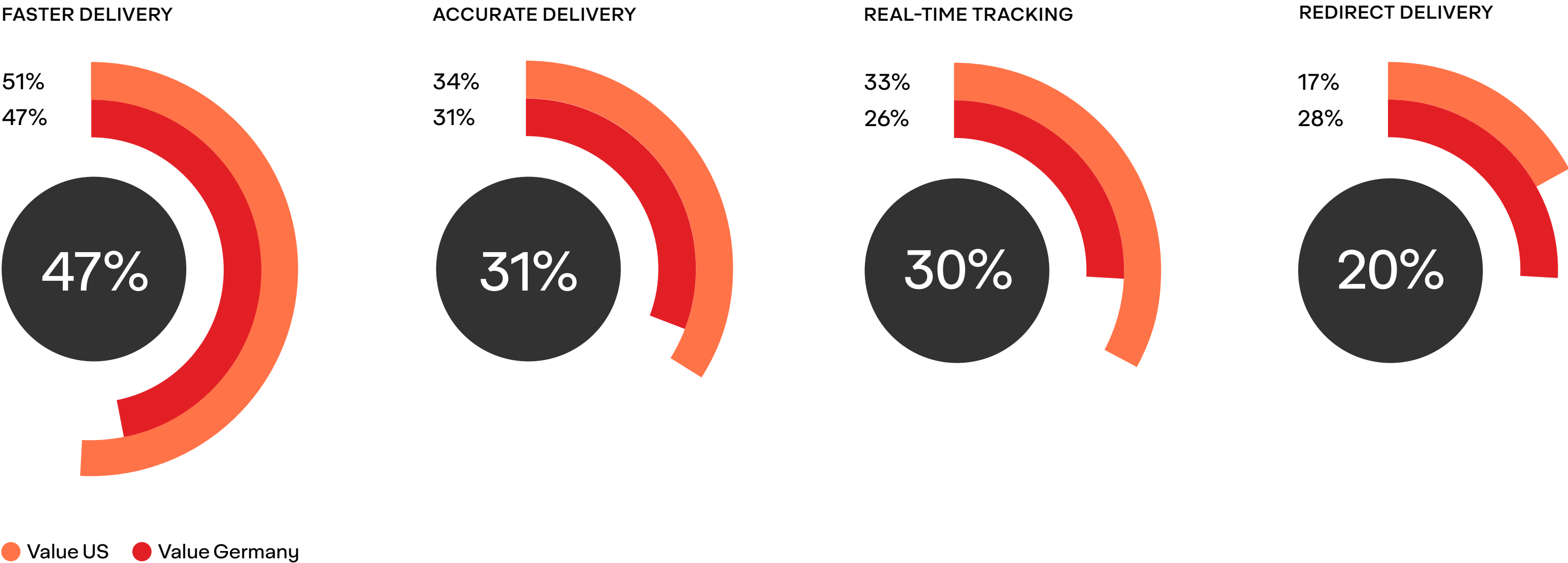
*"I JUST WANT TO KNOW
WHAT'S GOING ON!"*

*"TRACKING HELPS
PLAN MY DAY!"*



Consumers will pay for bespoke service options

EUROPE VS US



→
61%

Consumers are willing to pay more for a delivery experience that fits their needs for a specific delivery.

At first glance, this seems to contradict what we've heard for years: “Customers expect free delivery.” And they do, when the service is basic.

Consumers have been conditioned to expect free delivery. This new research shows consumers are prepared to pay for greater convenience and personalized options, for example with Amazon, Walmart, and Uber Eats. This is a value exchange, not a surcharge. Consumers don’t love fees, but they’ll pay when the experience earns it.

*"MY PACKAGE WAS
DAMP AND HALF TORN!"*



*"I'LL NEVER ORDER
THERE AGAIN."*

32%

US consumers **stop doing business with a brand they love** after a single bad experience.



Delays. Damage. Cost.

The big three experience killers.



The major bugbear is delivery delays, say four in ten consumers. 28 percent cited high delivery costs, and 28 percent say damaged packages.

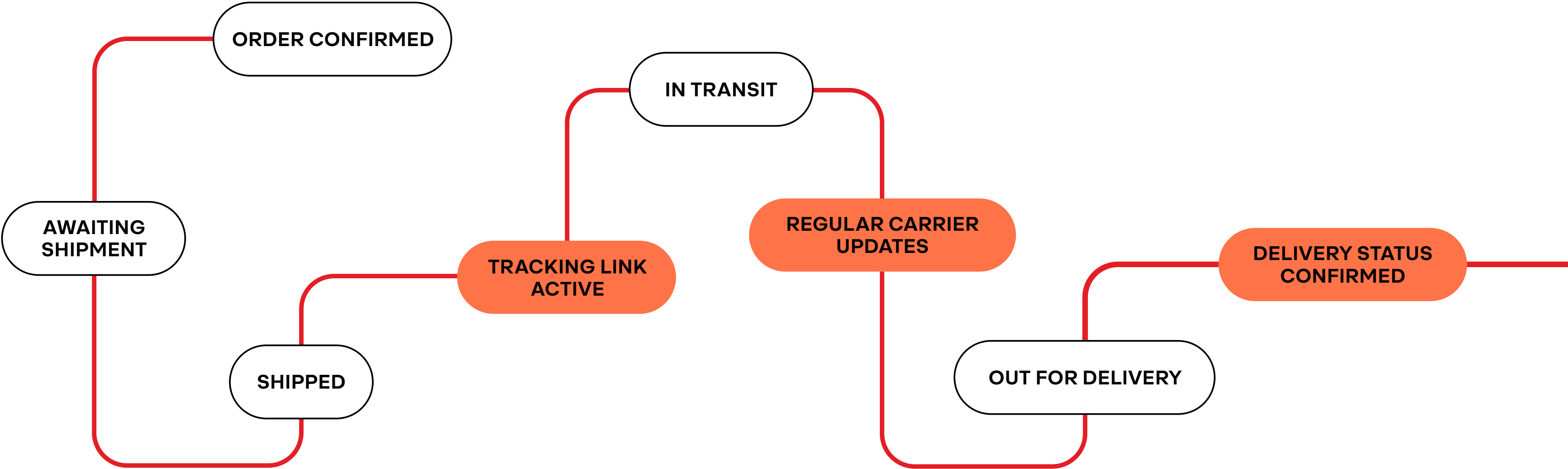
These aren't superficial issues. They erode trust and directly influence future buying choices. Consumers will forgive an occasional one-day delay, but a damaged item feels like betrayal. High costs, with no premium service to match, feel like a hidden surcharge.

No tracking? No confidence

➔
27% of UK shoppers
and 20% of Germans
rank tracking issues
as a major pain point.

We’ve moved into the era of compulsive checking. Just like people check ride-hailing apps or food delivery every 3 minutes, parcels are expected to behave like digital assets.

If the system can’t answer “Where is it?”, the consumer assumes the worst, and feels ignored.



Consumer tracking expectations
(among 45-54 year olds)

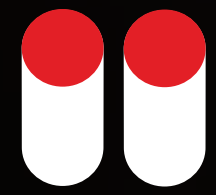


Not all deliveries are equal. Context shapes expectation

Consumers are smart, sophisticated, and demanding. They expect more tracking for valuable, fragile, or bulky items for which they need to be home to open the door, and less for simpler or smaller goods.

This means they make different delivery choices depending on what they are buying, and their expectations adapt accordingly. It's not one-size-fits-all.

→
8/10
Over 8 in 10 consumers want tracking for health and beauty.



Transparency fosters
confidence and strengthens
consumer loyalty,
even in a challenging
shipping landscape.

JULIE VARGAS

Vice president and general manager
Avery Dennison, Identification Solutions



Tracking is emotional

→
54%

Consumers say tracking lets them go about their day without fear of missing a delivery.

Tracking gives peace of mind for more than 50% of consumers. These are emotional benefits. Consumers aren’t just looking for data, they feel the need for reassurance. For consumers tracking isn’t about an intelligent label, it’s a digital promise and sequence of communications that say: “You’re in control.” This is perhaps the most important shift of all.

Despite the clear signals from consumers, there’s still a persistent disconnect between what people expect and what they receive. Delivery is no longer judged by whether it arrives—it’s judged by how it’s communicated, how it fits into life, and how it makes the customer feel. Every inaccurate and misleading update, every unclear return, every late delivery chips away at trust. For carriers and their retail partners, this is no longer just a service issue, it’s a revenue issue, a reputation issue, and a competitive threat.

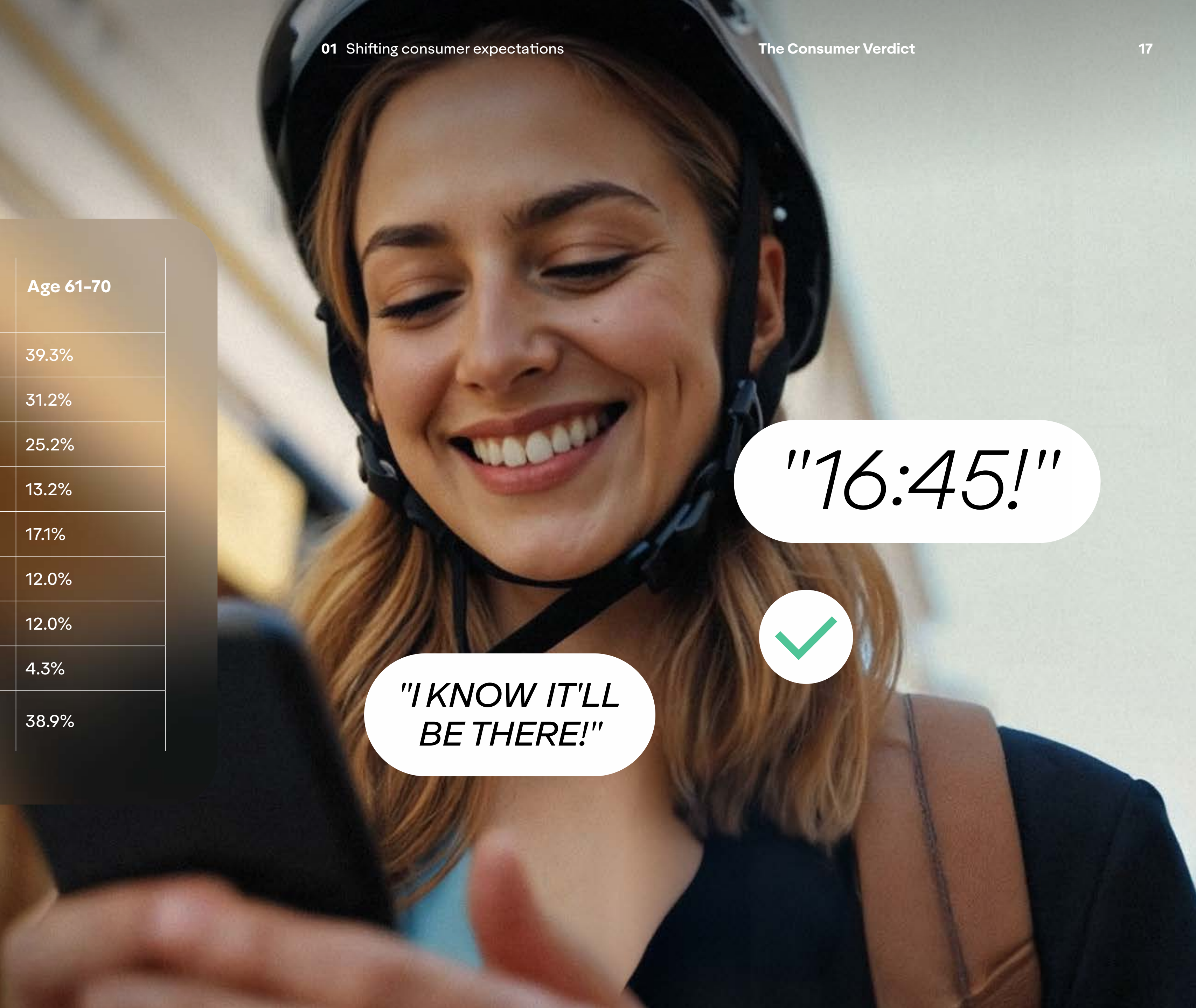


In what scenarios would you be willing to pay a premium for parcel tracking, if any?	Age 16-24	Age 61-70
Expensive/luxury items	36.9%	39.3%
Time-sensitive gifts for family and friends	31.5%	31.2%
Fragile items	34.2%	25.2%
Limited edition items	36.5%	13.2%
Black Friday/Christmas/Religious Festival	30.0%	17.1%
Items ordered from overseas	28.1%	12.0%
Personalized items i.e. football shirt	27.3%	12.0%
Items for my hobby	25.0%	4.3%
There are no scenarios I would be willing to pay a premium for parcel tracking	5.4%	38.9%

"16:45!"



"I KNOW IT'LL
BE THERE!"

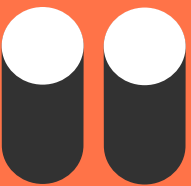


Why this --- matters --- now



500 Billion

→ Global parcel volumes are projected to exceed 500 billion by 2028.



If you ask me, predictability is the new speed.

People don't mind waiting a bit longer, but they need to know when their parcel is coming. This is the new expectation of consumers.



GINO VAN OLSEN
Professor
Retail Management and Shopping Behavior
Vlerick Business School

As volumes grow, consumer tolerance for poor visibility and unclear communication will decline.

Leading carriers and retailers are investing in innovative solutions to enable accurate data and visibility, and automation to improve efficiency. The difference between what consumers expect and what is delivered is now a key competitive factor.



Tracking says

"You're in control".

This is perhaps the most important shift of all.

Which moments --- break the delivery --- experience

The six trigger points

AN OVERVIEW

- 1. Order fulfilment
- 2. First mile
- 3. Sorting centers
- 4. Last mile
- 5. Delivery
- 6. Returns

The findings from our research show delivery expectations are changing, and higher than ever. But where exactly do things go wrong?

To bridge the gap between what consumers expect and what they actually receive, we need to identify the most common failure points along the delivery journey. These are specific, fixable failures that often happen at the hand-off points within the supply chain, and are dark zones for management.

This next section maps out the seven most critical trigger points where trust is lost, frustration spikes, and loyalty quietly slips away.

Hand-offs in the supply chain are known weak links. Where does a parcel journey go wrong, and why.



1

Order fulfilment

PARCEL JOURNEY STARTS

Even before a parcel leaves the building, trust can already be damaged. If there's a delay in confirming the order or dispatching it, the consumer immediately starts to worry. This is usually caused by phantom inventory, picking errors, or warehouse labor bottlenecks.



FIX
Accurate stock +
RFID-triggered picking
verification and order
confirmation to keep the
experience moving.

*"WHY HAVEN'T I RECEIVED
A SHIPPING NOTICE YET?"*



2

First mile

HAND-OFF TO PARCEL CARRIER

This is a crucial transfer of custody to the carrier. The moment the retailer prints the shipping label the consumer receives “your order is shipped” even though the parcel hasn’t been collected by the carrier.

3

Sorting centers

DARK ZONES

Most sortation centers are not automated and are blindspots where mistakes happen easily without management knowing when, why or how often. High parcel volumes, outdated tech, or bad labeling all cause human errors that delay sorting and misroute items. If there is no scan, no update is sent to the consumer

and the parcel appears to be at the facility even if it has already left. Many carriers also rely on aggregation, and if a parcel is scanned to an RTI, their tracking focuses solely on that RTI, and any errors during the initial association scan extend along the journey.





4

The last mile

IT'S NEARLY THERE

“Out for delivery” is one of the most misleading messages in the entire experience. If no ETA is shared, consumers feel left hanging. If the wrong ETA is shared trust evaporates. A missed

driver hand-off or routing mistake can derail the last mile. Misloaded packages where they are put onto the wrong vehicle can easily delay packaged for a day. This is where brand damage hits hardest.

5

Delivery

UP TO 20% FAIL

This is the most visible part of the process, and also where failure is personal. Why do up to 20% of parcels not get delivered the first time? Common triggers: wrong address, hard to find apartments, no access notes, delivery marked “complete” when it wasn’t, or the classic “Sorry we missed you” card.



“BUT I WAS HOME ALL DAY!”

FIX

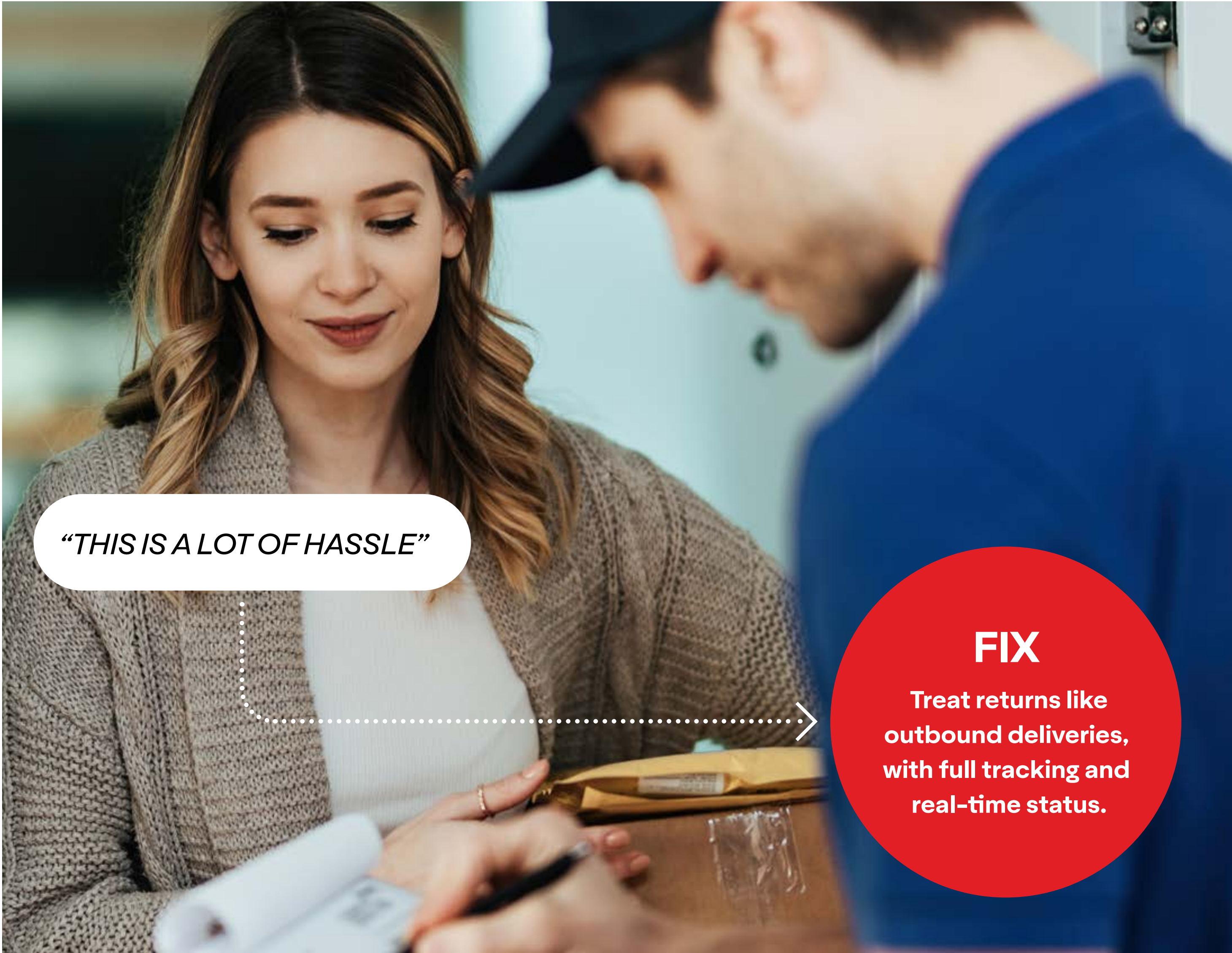
Photo proof, live delivery updates, and flexible redelivery options.

6

Returns

THE FORGOTTEN JOURNEY

Many supply chains treat returns as an afterthought. But for consumers, a confusing or slow return is anxiety-inducing and deeply damaging to trust. Missing labels, vague instructions, and slow refunds drive churn. Often, no one owns the hand-off between consumer, brand, and carrier.



“THIS IS A LOT OF HASSLE”

FIX

Treat returns like outbound deliveries, with full tracking and real-time status.

Who will

win your

consumers?

For consumers, delivery was once a functional afterthought, the final step after clicking ‘buy.’

Today, consumers expect a delivery experience that meets their needs. Retailers recognize this and understand that delivery options are vital to reducing cart abandonment. The moment a purchase moves from a digital shopping experience to physical reality is a critical fulfillment of expectations. And our research confirms expectations have shifted sharply:



4/10

Four in ten consumers now expect delivery within a scheduled 2–3 hour window.



6/10

Six in ten are willing to pay for enhanced tracking and timing when it matters to them.



The message is clear: speed alone won't win. Low cost without predictability won't be enough. The winners in this new delivery era will offer more than movement. They will have the capability to deliver clarity, care, and confidence, for each individual parcel, millions of times every day.

And here's the breakthrough. What if the best delivery experience could also be the most efficient? To make that possible, leading parcel carriers are embracing ambient intelligence: systems where every parcel, every handoff, and every stage in the operation becomes self-aware, self-reporting, and connected.

Using technologies including RFID-based shipment labels, the logistics operation becomes a dynamic, transparent system:

What intelligent parcels make possible

Manual processes can be optimized with sensor feedback.

Automation becomes possible reducing manual labor and errors.

Bottlenecks and dark zones in the supply chain are revealed.

Last mile can be optimized, improving predictability.

New services like dynamic rerouting, personalized notifications, and convenient return options become possible to implement.

In short, every parcel becomes a sensor.

Every delivery becomes a data point for improvement.

Our experts are implementing intelligent solutions with global parcel carriers. Discover how they are utilizing technologies in their operations today.



TURN EXPECTATIONS INTO ACTION

Five winning strategies for parcel carriers

Global parcel carriers are under pressure to do more, with less. These five strategies show how, by optimizing efficiency and consumer experience.

- 1

Keep your delivery promise
Identify and predict problems before they escalate.
- 2

Automate to reduce manual labor
Reducing time and human error from processes.
- 3

Offer accurate real-time visibility
Essential for the predictability consumers value.
- 4

Optimize first time delivery success
Eradicating additional cost and consumer frustration.
- 5

Prepare for simpler, smarter returns
Replicate the efficiency of the delivery.

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