Transparency and ease of online delivery

Report prepared for Citizens Advice

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Executive summary

Purpose of research

The rise in the popularity of online shopping has led to a sharp increase in the use of parcel delivery services - in 2015/16 over two billion items were delivered to households across the UK, an increase of 12% on the previous year.[1] Citizens Advice is the statutory consumer champion for postal services. It wanted to understand whether e-retailers are meeting their legal obligations, and following best practice guidelines, in relation to the information they give to consumers about delivery throughout the online shopping process.

Method

Citizens Advice commissioned Verve, an independent market research agency, to carry out research between February and March 2017. The research included an independent audit of the websites of 25 top e-retailers, and the diaries of 524 online shoppers who reported their experiences across 967 online shopping transactions.

Key findings

Overall retailer performance

Following the audit of websites, e-retailers were given a score (0 to 10) based on the presence of regulated and best practice information, clarity and ease of finding (see Appendix 4 for scoring criteria). A score of 10 indicates the majority of legally required information is in place and is clear and easy to find.

Just over half of e-retailers audited (13 of the 25) achieved an overall score of 7 and above, with one quarter scoring below 5 (6 out of 25 e-retailers) (see Figure 9).

E-retailers who performed poorly did so because key regulated information was either not found, unclear or not easily accessible. For example:

- Multiple clicks required to access returns and delivery information before checkout

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[1] Ofcom, Annual Monitoring Update on the Postal Market, 2016

- Long lists of options / FAQs to find regulated information
- Large bodies of text to read through to find key information

Shopping Stage 1: Browsing and choosing items

Regulated information on product descriptions and delivery costs was found in the majority of mystery shops when browsing and selecting products (78% and 63% respectively). However, fewer than 1 in 2 shops (48%) were given an estimated delivery date, and stock availability was not provided in 1 in 3 (35%).

In addition, fewer than 1 in 5 shops (19%) found delivery and returns information on the product pages (as recommended in the Statement of Principles). Shoppers want to see this key information on the stock availability, estimated delivery dates, cancellations and return costs on product pages as standard.

Shopping Stage 2: Buying items at checkout

Many mystery shoppers reported that legally required information was not provided at checkout: 2 in 5 (43%) were not given a delivery date, 1 in 3 (29%) were not given a final cost of delivery and just over 4 in 5 (82%) were missing return and cancellation information including the cost of returns.

The Statement of Principles recommends the provision of relevant delivery information on order completion. However, almost 7 in 10 (68%) reported that a dispatch date was not provided and less than 1 in 5 (16%) received information on who the delivery company would be.

Delivery options were not always offered as standard. Whilst 2 in 3 (67%) could select the type of delivery (standard or premium), fewer than half (47%) could opt for a convenient pick up point and less than 1 in 5 (17%) could select the delivery company.

Shopping Stage 3: Post check-out

Nearly 9 in 10 (85%) reported that receiving online deliveries was 'easy'. Safe spaces, trusted neighbours, convenient pick up locations and deliveries to work make parcel delivery more flexible. Those in remote areas however reported these options were not always available to them, which makes receiving deliveries harder.

Just over 2 in 5 (43%) did not receive dispatch and delivery date notifications, with almost 9 in 10 (86%) receiving no information on how to rearrange or cancel their order. Less than half (46%) of shoppers received a delivery confirmation.

Just over 8 in 10 shoppers (83%) were confused about refunds: only 1 in 6 (17%) understood that the basic delivery cost is included in the refund by law.

Background: Current Consumer Protection Framework

Significant growth in online shopping transactions is driving up the volume of parcel deliveries[2]. Several regulations and best practice guidance have been put in place to support the increased proportion of e-retailers and consumers who are impacted by the growth of online retail, which are outlined below.

These regulations include the Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013[3]; the Consumer Protection from Unfair Trading Regulations 2008[4], and the Price Marking Order 2004[5].

The regulations state the information that must be provided and what the conditions of the contract must include. These are summarised below (see appendix 1 for further detail):

- **Information provided before order completion to include**: the main characteristics of goods; all delivery charges and restrictions; the conditions of cancellation; return costs; payment arrangements and e-retailer contact details.
- **Conditions of cancellation**: Consumers have 14 days to cancel an order on receipt of goods; an order can also be cancelled on late delivery.
- **Conditions of refund:** Refunds need to be made within 14 days of return, and will include the standard cost of delivery (unless free).
- **Conditions of delivery**: Free or standard delivery is only offered to mainland UK if provided for all postcodes; goods must be delivered within 30 days unless otherwise agreed with the consumer; the delivery of the goods is the responsibility of the e-retailer until received by the consumer.
- **Call charges:** Call costs are no more than the basic rate where a post-order phone line is provided.

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[2] Measuring consumer awareness of online delivery rights 2015 - http://bit.ly/2rrJQRI
Delivery Matters - Understanding the needs of UK online shoppers in 2016 - http://bit.ly/2renGTR
[3] The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 - http://bit.ly/2rWO0Vo
[4] The Consumer Protection from Unfair Trading Regulations 2008 - http://bit.ly/2sxwKHa
[5] The Price Marking Order 2004 - http://bit.ly/2rrFLgk

Alongside legal obligations, the 2014 Statement of Principles for parcel deliveries[6] is a set of voluntary recommendations for e-retailers that includes the following (see appendix 1 for further detail):

- **Provision of information:** Delivery charges, returns and exemptions, and any additional charges should be clearly shown on home pages, all product pages and summarised at checkout. Clear information on delivery options (e.g. safe spaces, tracking, signature requirements) need to be provided before the order is complete.

- **Delivery costs:** Extra costs for delivery to certain geographic areas reflect the real additional cost to the e-retailer, and are provided to the consumer at the earliest possible stage in the shop.

- **Delivery updates:** Relevant delivery information is made available on dispatch and / or order completion.

- **Rate of success:** E-retailers should work with parcel delivery companies to improve the success of first-time delivery (e.g. timed slots, local collection points, safe spaces and redelivery options).

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[6] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW

Method

Approach

Verve, an independent market research agency, carried out mystery shops with e-retailers in February and March 2017.

1. An independent audit of the websites of 25 e-retailers selected from the Top 50 IMRG E-retailer Index[7] (see Table 1 for e-retailers audited)
2. 524 GB online shoppers filled out a total of 967 online shopping diaries as they shopped with e-retailers

The Independent Audit

- A range of different e-retailers were selected to cover single category, multiple category, and a range of products sold
- The majority of e-retailers (two-thirds) were audited on mobile and desktop sites
- E-retailers were checked to see if consumer rights legislation and best practices are present, correct, and easy to find
- Buying and delivery of items were covered by the online shopping diary.

Table 1 – Audited e-retailers

Aldi	ASOS	H&M	New Look	Superdrug
Amazon	B&Q	House of Fraser	Next	Tesco
Apple	Boots	Ikea	Sainsbury's	TK Maxx
Argos	Currys	John Lewis	Screwfix	Very
Asda	Debenhams	M&S	Sports Direct	Wilko

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[7] IMRG comScore Top 50 E-retailer Ranking – September 2016 - http://bit.ly/2rnpGx3

Online Shopping Diary

- Online shoppers filled out a diary when browsing for and choosing items, during checkout and payment, and while waiting for and receiving their delivery (see Appendix 2 for online shopping diary)
- Shoppers filled out diaries for up to 3 different e-retailers (see Appendix 5 for the list of e-retailers for which diaries were completed)

The Sample

We surveyed a nationally representative GB sample to find a broad range of online shoppers who were planning to shop in February and March 2017, and were willing to take part in the online diary. The survey was carried out both online and by telephone to make sure people took part from urban, rural and remote and island areas (as defined according to the postcode at which they live).

- 2,285 people agreed to take part in the online diary, including 290 from remote and island areas
- 524 people went on to fill out diaries for 1 or more retailers
- We received a total of 967 online shopping diaries:
  - 252 diaries from rural areas
  - 30 diaries for remote and island areas

Key points to note

- This research focuses on small and medium items: Parcels and packages up to 20kg in weight (excluding furniture, white goods and large electrical items). This does not include grocery shopping, though grocery e-retailers are assessed on any qualifying items.
- Marketplaces are excluded as we did not look at independent sellers as part of this project. Amazon is included where shoppers say the item is sold and delivered by Amazon.
- Online shoppers could complete up to 3 diaries. Diary findings are based on the total number of diaries completed (967) rather than the total number of online shoppers (524).

- This report is based on all e-retailer diaries. Any individual e-retailers included have been reviewed by at least 10 different online shoppers and been independently audited by Verve.

- When information is reported as found or not found in the online shopping diaries, is based on the view of the consumer and does not mean we can definitively conclude the information is present or not.

Evaluation of regulated information on retailer websites

Summary

- Legally required product and pricing information is found easily on the **product pages** in all audited websites.

- Whilst regulated **returns information** is found in most e-retailer websites (at least 23 out of 25), 1 in 3 websites do not state the refund of basic delivery costs and free return of damaged goods.

- **Delivery information** on delivery dates and options for delivery type are clearly displayed on all retailer websites. However, standard delivery areas and delivery prices for remote and rural locations are not found in a significant proportion of e-retailers (11 and 14 websites respectively).

- Just 1 in 2 (12) e-retailers provide information about the **delivery companies used** – this is information that consumers find useful when provided post-order.

- **Contact and complaints information** requires attention. Details of call charges are not found in a third of sites, and just 1 in 3 state that they are responsible for the delivery of the item.

Product & pricing information

Detailed product descriptions, and total price including delivery is universally present and rated by auditors as easy to find in almost all cases (24 out of 25 e-retailers)

E-retailers are legally obliged to provide full and accurate descriptions of the product, along with the total price including delivery. This information is found on the websites of all 25 audited e-retailers. Auditors rated the information as clear (i.e. in consumer-friendly language using simple, precise explanations) in all but 1 case (see Figure 1).

Figure 1 – Product Page: Is key information found on e-retailer websites, and is it clear?

No. of retailers in which information is:	A full description of the product	A total price (delivery + cost of delivery)
FOUND	**25** of 25	**25** of 25
CLEAR	**24** of 25	**25** of 25

Is key information on product page found and is it clear?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)

Across most e-retailers (24 of 25), detailed product descriptions are rated as easy to find (4 or 5 out of 5 where 5 is very easy to find) (see Figure 2).

Figure 2 – Product Page: How easy to find is key information?

How easy to find is key information on product pages?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
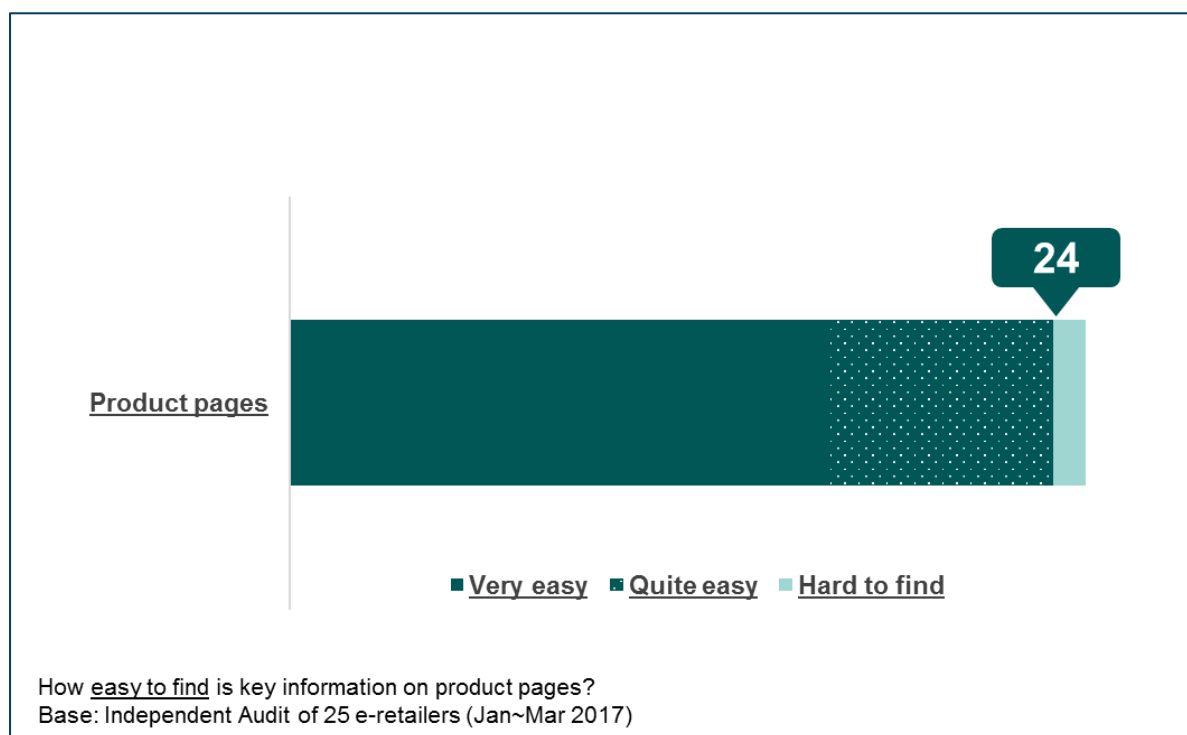
Returns Policy

Legally required information on returns & refund timelines are found on most websites (23 out of the 25). Delivery refund costs and the refund policy are hard to find in one-third

Legal requirements for returns information include the timeframe the consumer has to return the item, the cost of the return delivery, what will be included in the refund and conditions around the return of damaged or faulty goods.
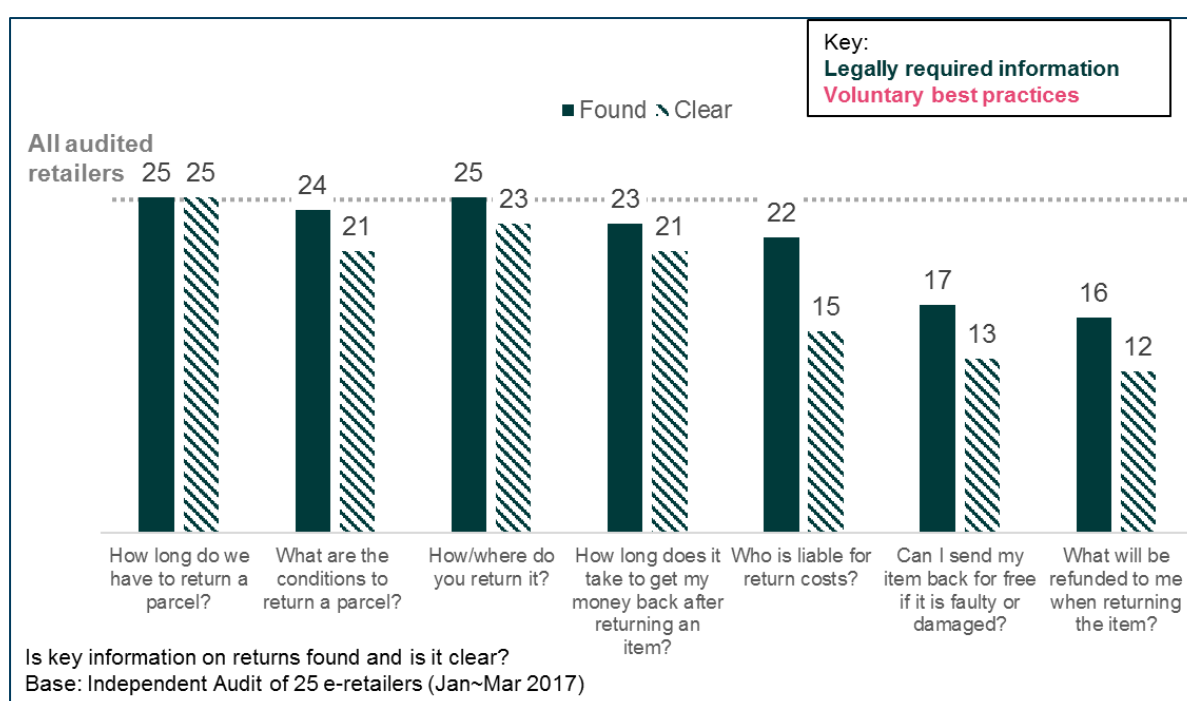
We found the following regulated returns information across most audited e-retailers:

- How long consumers have to return a parcel: all 25 audited e-retailers
- How and where to return items: all 25
- The conditions of return: 24 out of 25
- How long it takes to get the refund: 23 out of 25

The above returns information is rated as being clear to understand across most e-retailers (at least 21 out of 25 websites).

E-retailers must legally state upfront who will pay the delivery cost of a returned item; if not stated, the consumer is not required to cover this cost themselves. This information is found in 22 out of 25 e-retailer websites (see Figure 3). However, 7 out of the 22 e-retailers do not present this information in a clear and consumer-friendly way.

Figure 3 – Returns: Is key information found on e-retailer websites, and is it clear?

Is key information on returns found and is it clear?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)

Auditors were unable to find the following regulated information:

- Whether the item can be sent back for free if faulty and / or damaged (found in just 17 of 25 sites)
- Whether the refund includes the cost of standard delivery (found in 16 of 25 sites).

Information on the refund of delivery costs is poorly presented in 4 out of the 16 e-retailers where found: a key area in which e-retailers need to improve their communication of consumer rights information.

Finding regulated returns information is easy in 18 out of 25 e-retailers (see Figure 4).

Figure 4 – Returns: How easy to find is key information?

How <u>easy to find</u> is key information on returns?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
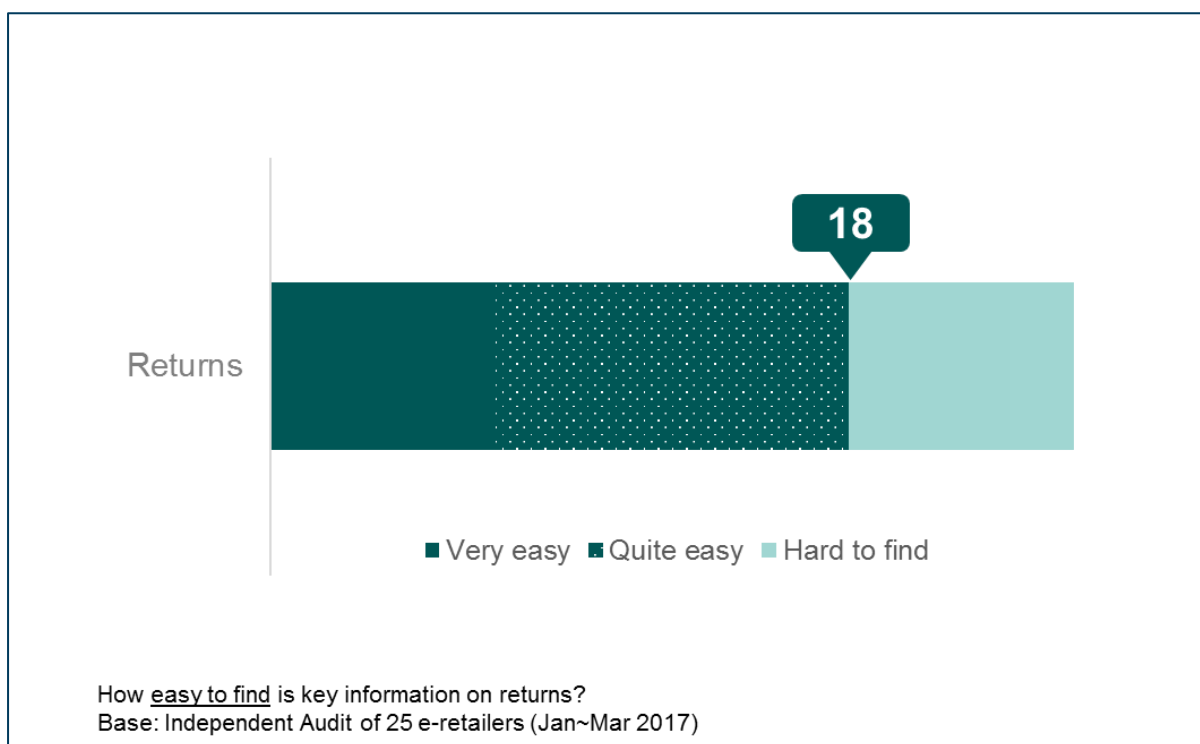
Delivery Policy

Delivery timelines and options for type of delivery are clearly presented in all e-retailers. However, regulated information impacting rural and remote shoppers is not found in almost half of websites (at least 11 e-retailers)

Regulations state that e-retailers should provide upfront information on expected delivery times; the delivery options (standard or premium); clear delivery pricing for rural and remote areas. Furthermore, the Statement of Principles recommend that e-retailers should work with delivery companies to improve the success of first time deliveries. For example, flexible delivery options (e.g. timed delivery slots and special delivery instructions), information on the delivery company, and what happens in cases of failed delivery.

Information on expected delivery timelines is found in all 25 audited websites and options to choose delivery type in 24 out of 25. This information is rated as clear in all cases.

Regulated information most likely to impact those in rural and remote areas is not found in a significant proportion of retailer websites. Information on areas covered by standard delivery is not found in 11 out of the 25 websites audited. Furthermore, in over half of the e-retailers audited (14 out of 25), delivery prices to rural and remote areas are not present before providing a postcode at checkout.

Where the above information is found, it is rated as clear in all but 1 of the retailers (see Figure 5).

Figure 5 – Delivery: Is key information found on e-retail sites, and is it clear?

Is key information on delivery found and is it clear?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
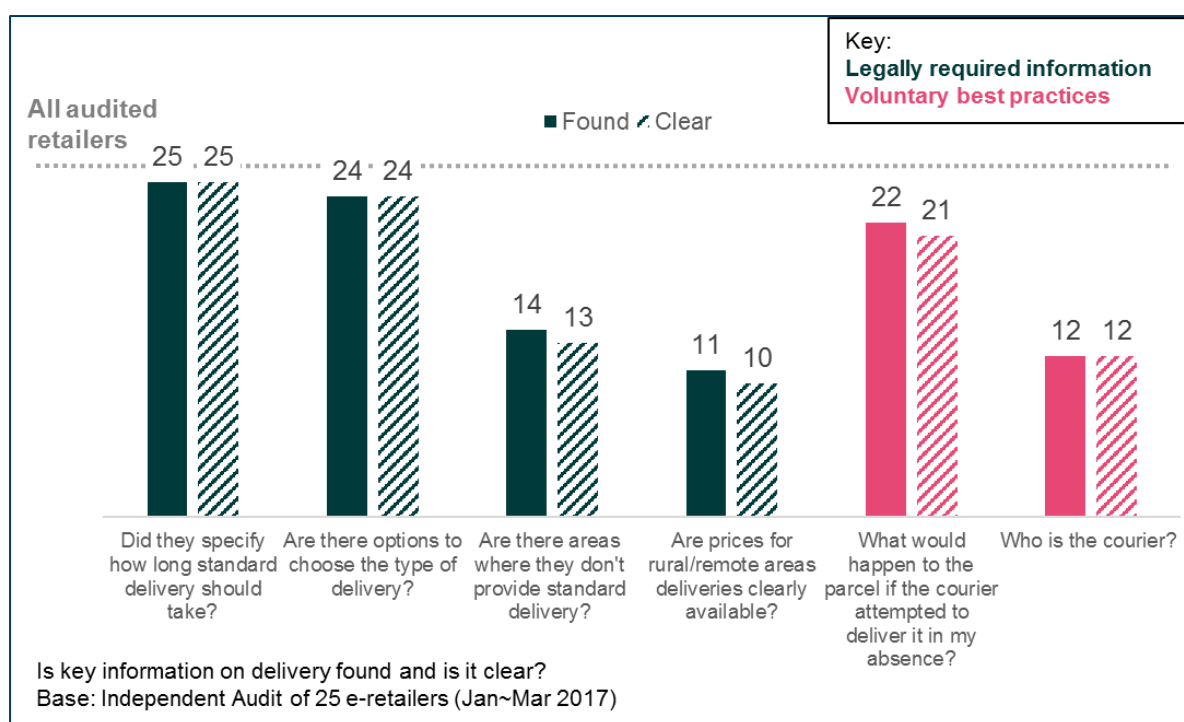
Evidence of meeting voluntary best practices on failed delivery is found in 22 of 25 e-retailer websites. Information on which parcel delivery companies are used by e-retailers are only found on 12 websites – though when provided this information is clearly presented.

When rating the ease of finding delivery information on e-retailer websites, 18 of the 25 audited are rated as 4 or 5 out of 5 (where 5 is very easy to find).

Figure 6 – Delivery: How easy to find is key information?
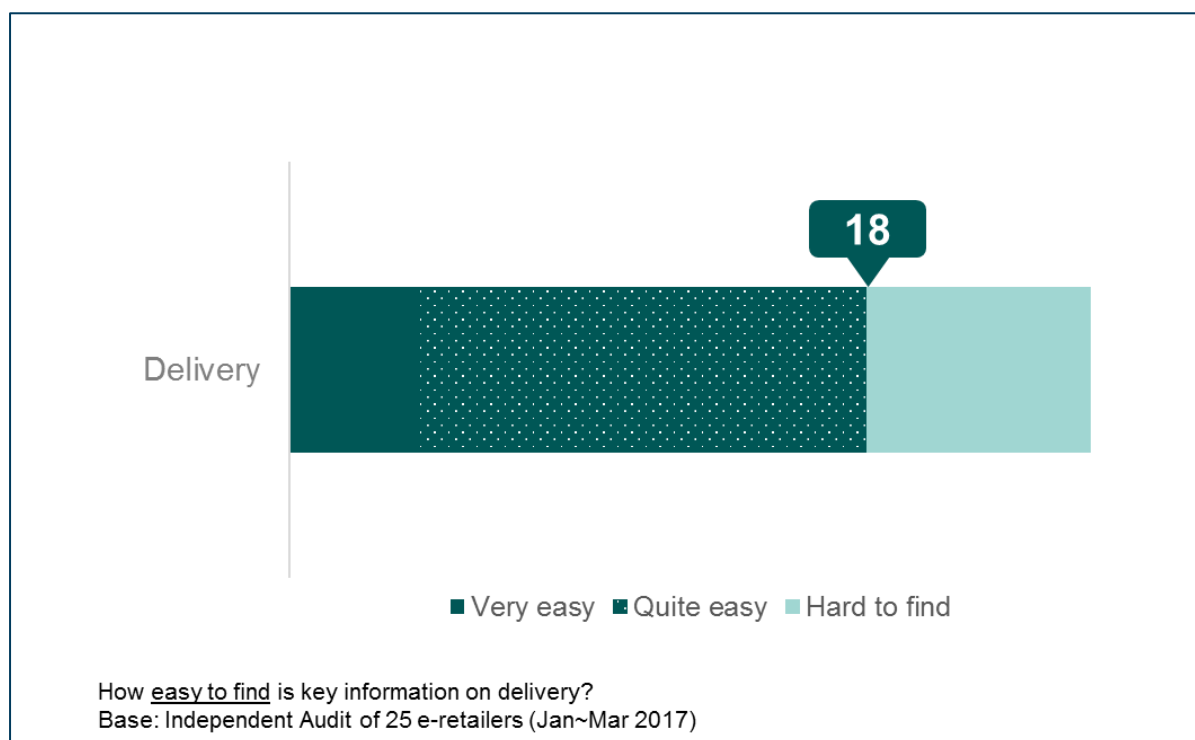
Contact and complaints information

Contact and complaints information requires attention; clarity on call charges and who to contact with delivery queries is lacking

Online traders are legally required to provide certain information on how and who to contact for queries and complaints. This includes clear channels of communication and a legal address for the trading company. In cases where e-retailers provide a telephone number, any call charges should be clearly stated.

Across all 25 audited websites, different contact methods are provided and all e-retailers provide this information clearly.

However, other key details of contact details are not found across a number of audited websites (see Figure 7). While call charges are found across 17 out of 25 e-retailers, these call charges are only clear in 13 of the 17 e-retailers. Although

Ofcom has campaigned consistently to improve the clarity around call charging information[8], this remains an area of improvement for e-retailer websites.

Figure 7 – Contact / Complaints: Is key information found on e-retailer websites, and is it clear?

Is key information on contact and complaints found and is it clear?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
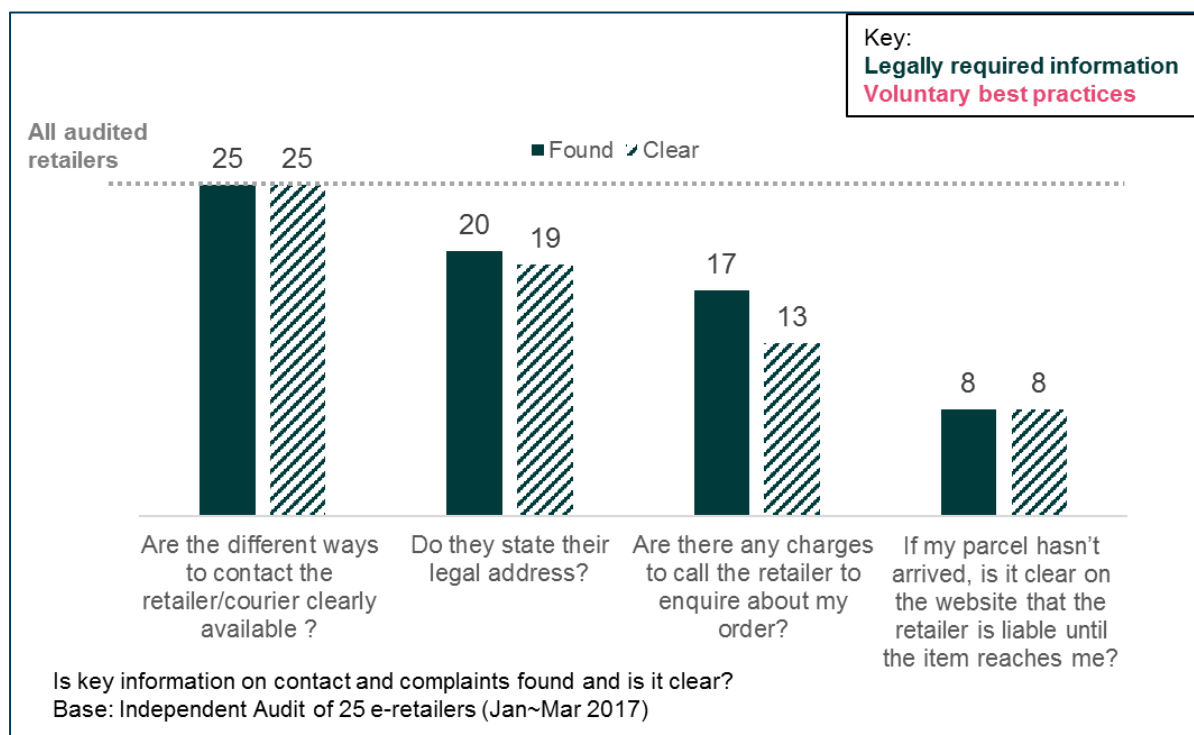
The successful delivery of the item is the legal responsibility of the e-retailer until it reaches the consumer, but information that explains that the e-retailer is liable up until the point of delivery is only found in just 8 out of 25 e-retailer websites.

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[8] Telephone call charges to be made simpler – Ofcom 2013 - http://bit.ly/2tiaPRf
Telephone charges made simpler next month – Ofcom 2015 - http://bit.ly/2rnREst

Contact and complaints information is rated as hard to find in 10 out of 25 audited sites (see Figure 8).

Figure 8 – Contact / Complaints: How easy to find is key information?

How <u>easy to find</u> is key information on contact and complaints?
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
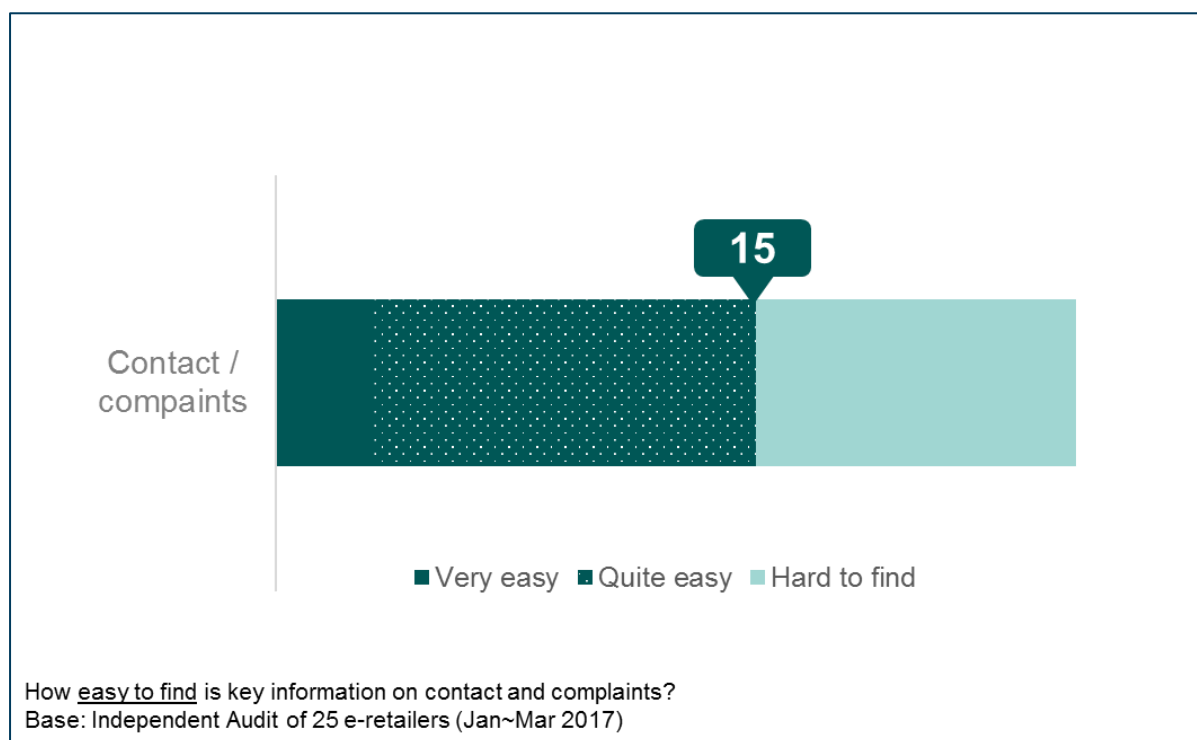
Overall retailer performance

Top performing websites provide regulated delivery and returns information on the product pages, using minimal text and visual aids to communicate key information at a glance

E-retailers were given a score (0 to 10) based on their performance for presence of regulated and best practice information, clarity and ease of finding (see Appendix 4 for scoring criteria). A score of 10 indicates the majority of legally required information is in place and is clear and easy to find.

Just over half of e-retailers audited (13 of the 25) achieve an overall score of 7 and above, with one quarter scoring below 5 (6 out of 25 e-retailers) (see Figure 9).

Figure 9 – Number of e-retailers by overall audit score out of 10

Overall retailer score based on whether information is found, clear and easy to access
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)
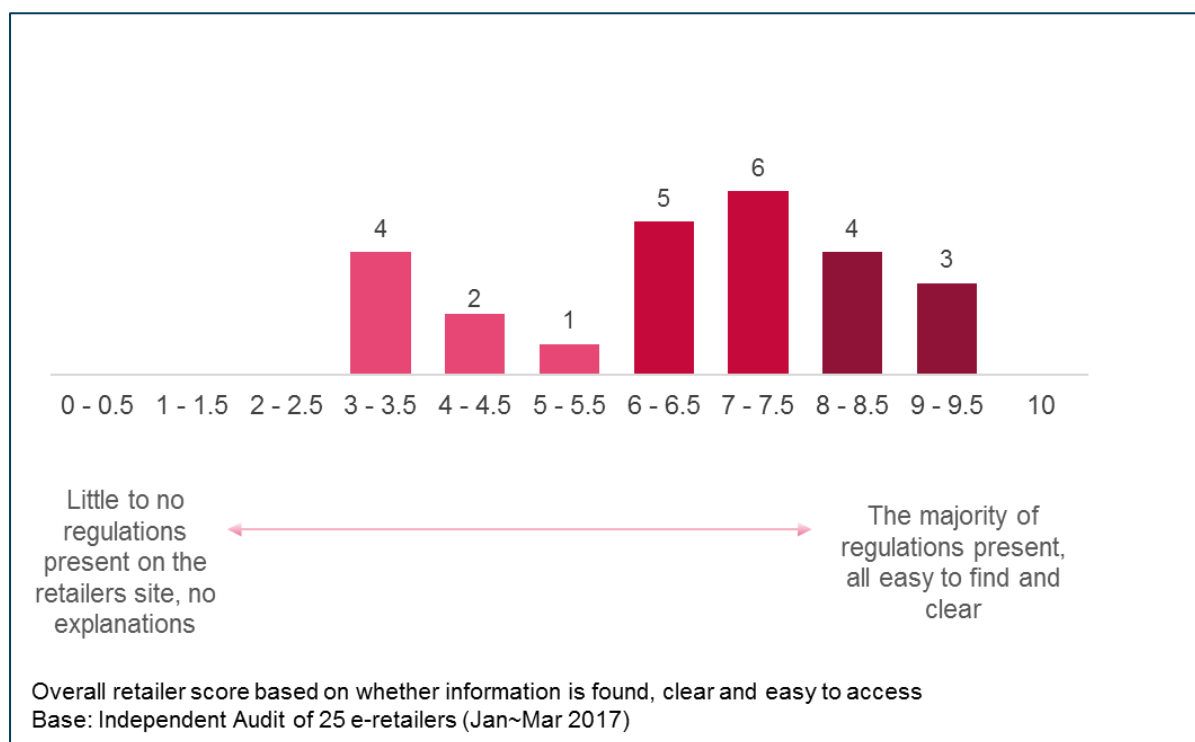
E-retailers who perform poorly do so because key regulated information is either not found, unclear or not easily accessible. For example:

- Multiple clicks required to access returns and delivery information before checkout
- Long lists of options / FAQs to find regulated information
- Large bodies of text to read through to find key information

Table 2 shows several examples from top performing e-retailers, illustrating how regulated information on delivery and returns can be displayed to make the shopping experience easier and more accessible for consumers. Top performing e-retailers also receive higher scores on average for quality of delivery and returns information when browsing.

Table 2 – Examples of how regulated information is made clear and accessible to consumers

Example of legal requirement	Where found on e-retailer website	How this is made easy and accessible for consumers
Returns information: • The period in which to cancel / return items • The costs of returning the goods • The time taken for a refund	• On the product page • With ability to click once from the product page returns summary to access more detailed returns information • Additional details on returns and refund page	✓ Key return information shown in an easy to read table ✓ Minimal text with option to click again for more detail ✓ Return costs are stated alongside delivery costs on product pages e.g. 'Returns are free'
Delivery information: • Any delivery charges and additional costs to be charged – displayed in a way that is clear to the consumer • Any delivery restrictions • Time taken to deliver the goods	• On product pages • As a banner across the top of the home page • Additional details on the delivery page	Delivery information displayed as part of product pages, using icons and minimal text, with option to click for more detail. The following are examples of how this is effectively displayed on product pages: ✓ Flexible options for free, standard and premium delivery including click & collect and in-store collections. One retailer shows the company logo of the delivery company against delivery type ✓ Cost (or 'FREE') displayed in bold against each delivery option ✓ Clearly states delivery restrictions e.g. 'International delivery not available' (but with option to click to find out how the e-retailer can support in such cases) ✓ Option to click to see postcodes of areas for which next day delivery is not available (and stating how many days delivery will take by postcode area)

Examples from top three performing retailers
Base: Independent Audit of 25 e-retailers (Jan~Mar 2017)

The Online Shopping Process

Alongside the independent audit of e-retailer website, we surveyed 524 consumers who conducted 967 online shopping transactions over the period of one month. Online shoppers completed an online diary for up to three different e-retailers as they browsed, purchased and received deliveries.

Consumers reported back on whether e-retailers provide certain legally required information[9] and whether voluntary best practices, as recommended in the Statement of Principles for parcel deliveries[10], is provided at key stages in the online shop (browsing, placing an order, waiting for and receiving the delivery).

Shopping Stage 1: Browsing and choosing items

Summary

Regulated information on product descriptions and delivery costs are found in the majority of shops when browsing and selecting products (78% and 63% respectively)

- Fewer than 1 in 2 shops (48%) are given an estimated delivery date, with 1 in 3 shops (35%) not finding stock availability information when browsing
- Fewer than 1 in 5 shops (19%) find delivery and returns information on the product pages (as recommended in the Statement of Principles). Shoppers want to see if key information on the stock availability, estimated delivery dates, cancellations and return costs on product pages as standard

Just over three-quarters of shops (78%) provide a detailed product description and just under two-thirds (63%) the cost of delivery, whilst 1 in 2 (48%) don't display the estimated delivery time

Regulation states that e-retailers must provide clear upfront information (before the order is placed) including the main characteristics of the goods being sold, time taken to deliver the goods and full cost of delivery including any additional charges.

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[9] Business Companion - http://bit.ly/2rnbRyG
[10] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW

In line with the independent audit, the following legally required information is present in most of the online shops when browsing and selecting items (see Figure 10):

- A product description (78%)
- Delivery costs to a chosen address (63%)

Figure 10 – Information made available before placing an order
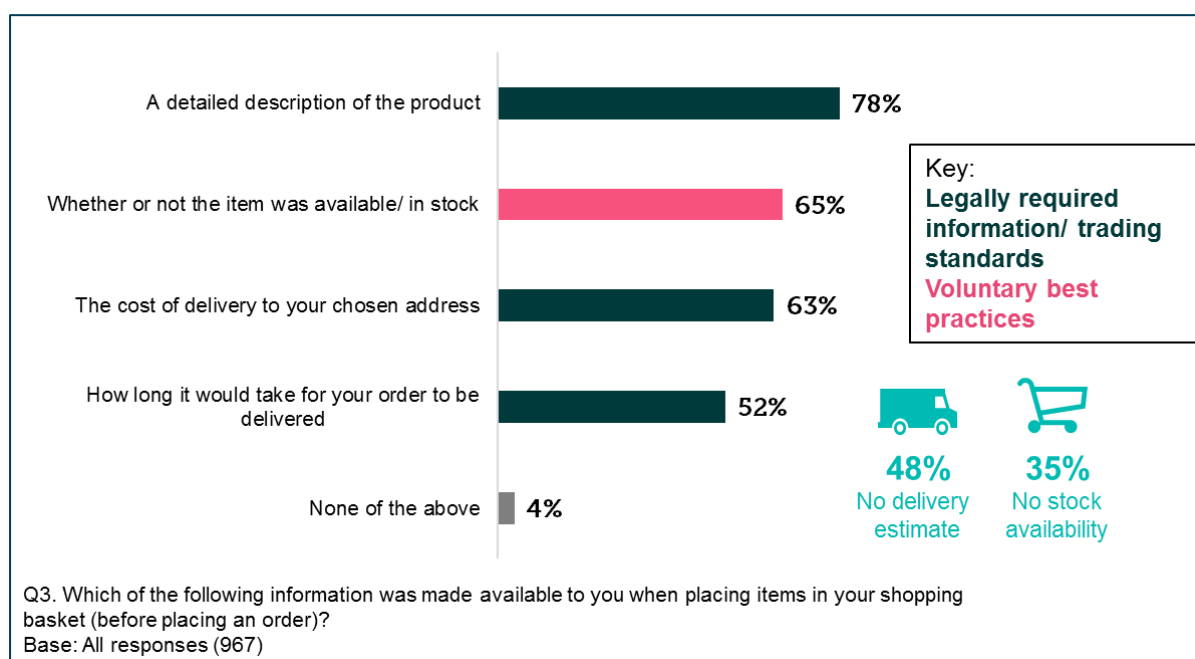
However just under 1 in 2 shops (48%) do not see an estimated delivery time. Consumers tell us that both are essential when selecting items:

"Approximate delivery date will be very helpful. It has happened before, that after placing my order I had to wait more than 10 days. The [e-retailer] then cancelled the order saying 'Item is out of stock'. That's really irritating." Female, 35-44, Urban location, Fashion and Homeware e-retailer

"I would like a delivery estimate i.e. 'delivered within 3 working days' rather than just 'despatched within 24 hours' as this means nothing as you do not know where it is coming from, so it could take many days to weeks to actually arrive." Male, 35-44, Rural location, Entertainment e-retailer

Over a third (35%) see no stock availability. Whilst e-retailers are not legally obliged

to provide this information, it is key information required in making a purchase decision.

4 in 5 shoppers (81%) must click away from the product pages to find delivery and returns information

Clear upfront information on delivery and returns must be provided in advance of an order being placed to be in line with regulation. Information should therefore be readily accessible on key pages of the e-retailer's website. Voluntary guidelines from the Statement of Principles recommend that delivery charges and return policy is shown on the home page, all product page pages and summarised at checkout.

At the stage of selecting products, fewer than 1 in 5 shops (19%) find delivery and returns information on the product pages (see Figure 11). Almost 1 in 2 need to go to the delivery information page(s) (46%), and fewer than 1 in 3 (31%) the returns / refunds pages. Nearly 1 in 3 shops (31%) do not receive this until checkout.

Figure 11 – Pages visited to find delivery and returns information

Q4. And which page(s) did you need to visit to find delivery and returns information on the [RETAILER] website?
Base: All responses (937)
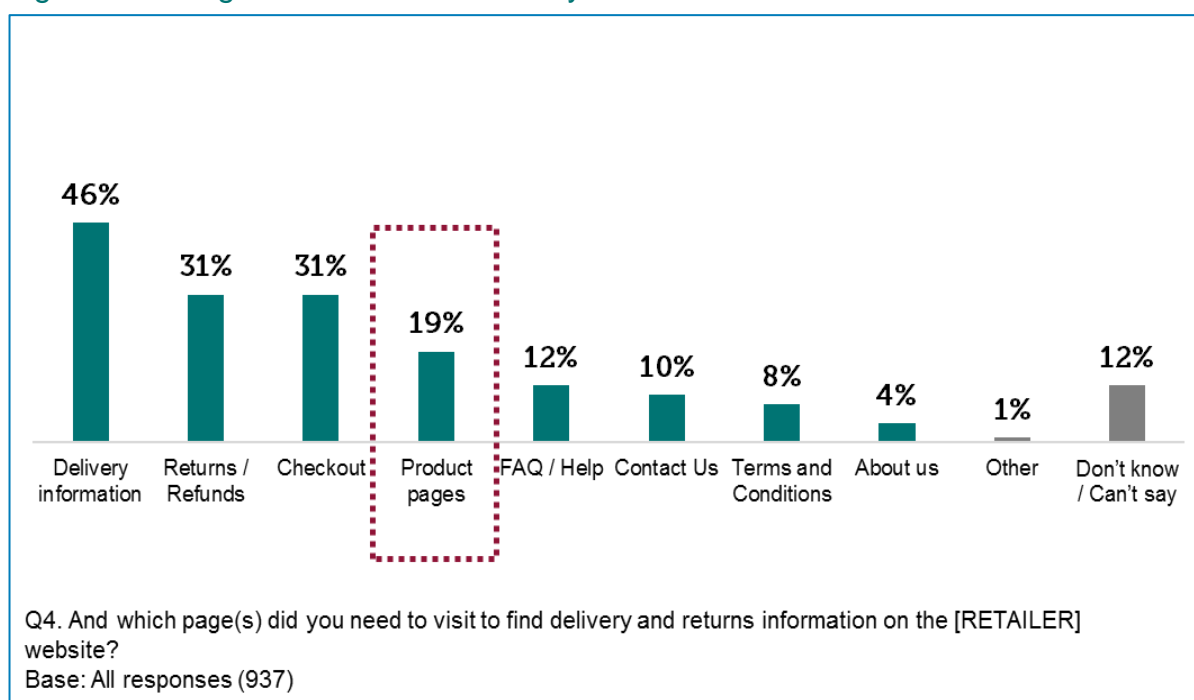
1 in 4 consumers (23%) tell us that they would like to see more e-retailers providing delivery and returns information on the product pages. This simplifies the online shop and saves time by reducing the number of clicks to find answers to key questions.

"It was pretty good already, but if it was all available to see without having to click on anything else, so I could see it that would be even better." Female, 35-44, Rural location, Health & Beauty e-retailer

"It should have shown [information] on the main page without the need to keep clicking on links." Female, 35-44, Rural location, shopped with Health & Beauty e-retailer

When selecting items, delivery and returns information is rated as 'good' in almost 2 out of 3 shops (63%), but shoppers want to see more information provided pre-checkout

Regulation states that delivery and returns information including pricing and policies, should be provided upfront and at least before an order is placed. Voluntary best practice guidelines suggest that this should be provided at the earliest possible stage on the e-retailers website.

When selecting products 2 in 3 shops (63%) rate delivery and returns information as good (a score of 8, 9 or 10) (see Figure 12).

Figure 12 – Quality of information provided when placing items in shopping basket

3%
Poor

33%
Average

63%
Good

Q5. Overall, how would you rate [RETAILER] for the delivery and returns information provided when placing items in your shopping basket?
Base: All responses (967)
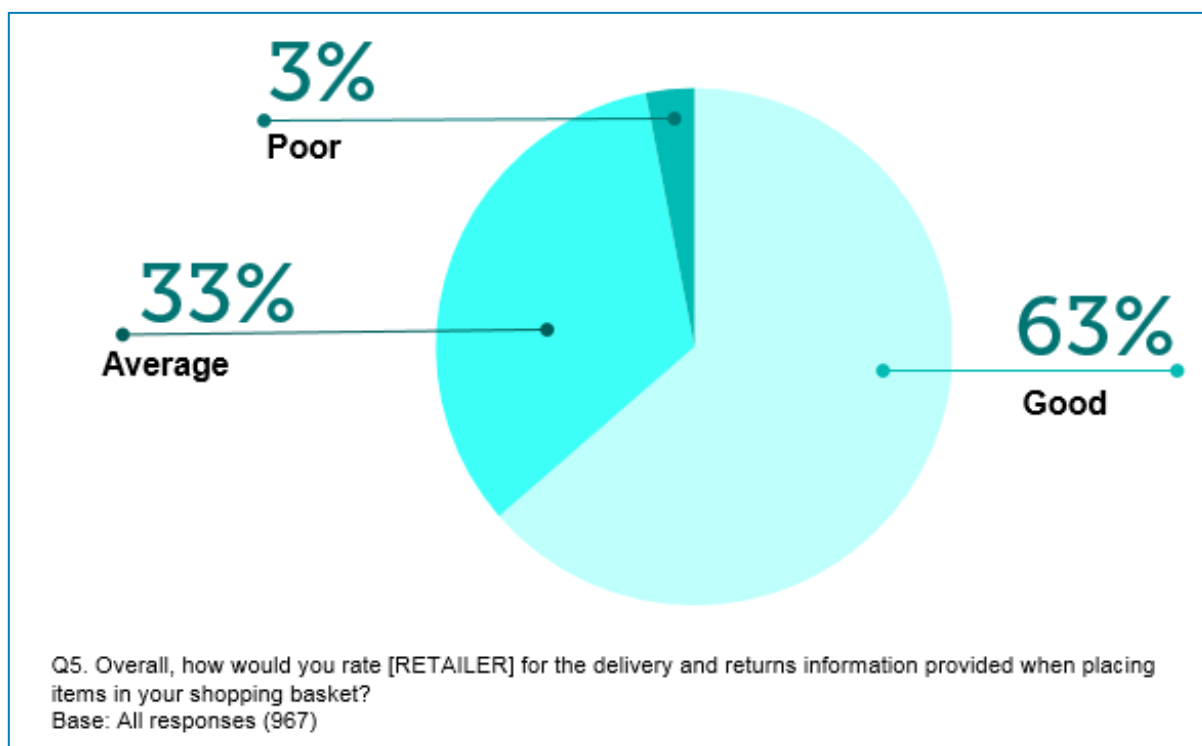
Consumers consider good delivery and returns information to provide:

- Key information on delivery and returns given before reaching the checkout
- Clear and easily accessible information on the product page
- Detailed product information, stock availability, estimated delivery time and returns information provided before going to checkout.

"All the information I required was there. I could see delivery charges and expected delivery dates." Female, 45-44, Urban location, Multi Category e-retailer

"It was detailed and a good level of data from which I could make an informed decision. The information covered a lot: sizing, delivery, returns terms, for example." Female, 25-34, Urban location, Multi Category e-retailer

"There was a great description and lots of information about the items." Female, 18-24, Urban location, Multi Category e-retailer

It's important to recognise that one third (33%) of shops rate delivery and returns information as 'average' (a score of 5, 6 or 7 out of 10) - there is room for improvement in the information provided pre-checkout. Where delivery and returns information is average or poor, consumers tell us that there is not enough information on stock availability and delivery cost pre-checkout:

"It won't tell you delivery costs until you attempt to check out." Female, 25-34, Urban location, Multi Category e-retailer

"Item was out of stock but only showed up after I tried to add in shopping basket." Female, 25-34, Rural location, Health & Beauty e-retailer

"You do not find out until you are in the payment section of the purchase." Male, 65+, Urban location, Multi Category e-retailer

Online shoppers tell us that making delivery and returns information readily available when browsing will improve information provision:

"The delivery charge could be on the initial product information page rather than having to wait until you get to the basket." Male, 45-54, Urban location, Multi Category e-retailer

"It would be nice if delivery and return information will be shown the moment you place something in the basket." Female, 18-24, Rural location, Multi Category e-retailer

Opinions by consumer demographic indicate no difference in view based on geographic location (rural and remote or urban), household income (including income support), working status or disability. Female shoppers and those aged over 55 were more likely to rate delivery and returns information as 'good'.

Table 3 – Quality of information provided when placing items in shopping basket by key groups

	All online shoppers	Gender		Age			Area	
		Male	Female	Under 35	35-54	55+	Urban	Rural & Remote
Good (8 to 10)	63%	59%	68%	64%	59%	73%	64%	62%
Average (5 to 7)	33%	37%	29%	31%	38%	25%	32%	35%
Poor (0 to 4)	3%	4%	3%	5%	3%	2%	4%	3%

Q5. Overall, how would you rate [RETAILER] for the delivery and returns information provided when placing items in your shopping basket?
Base: All responses (967), Male (431), Female (506), Under 35 (328), 35 to 54 (429), 55plus (180), Urban (685), Rural & Remote (282)

Shopping Stage 2: Buying items at checkout

Summary

Consumers would like e-retailers to improve the checkout experience with information on return costs, delivery company used and estimated dispatch and delivery dates provided as standard.

- Many shops report that legally required information is not provided at checkout: 2 in 5 (43%) are not given a delivery date, 1 in 3 (29%) no final cost of delivery and just over 4 in 5 (82%) are missing return and cancellation information including the cost of returns.

- The Statement of Principles recommends the provision of relevant delivery information on order completion. However, almost 7 in 10 (68%) report that a dispatch date is not provided and less than 1 in 5 (16%) receive information on who the delivery company will be.

- Delivery options are not offered as standard. Whilst 2 in 3 (67%) can select the type of delivery (standard or premium), fewer than half (47%) can opt for a convenient pick up point and less than 1 in 5 (17%) can select the delivery company.

- 1 in 5 (20%) of order confirmation emails provide the regulated basic rate or Freephone line for post-order queries. A fifth of consumers (18%) are uncertain as to the cost of calling the number provided.

Legally required information on delivery, returns and cancellation is not found at checkout for a significant proportion of e-retailers

Consumers report that they are not provided with legally required pre-order information when going through checkout (see Figure 13):

- Over 2 in 5 (43%) are not given a timeline for delivery
- 1 in 3 (29%) do not find a cost of delivery
- Only 1 in 4 (23%) shops recall seeing information on how long they have to return an item, and less than 1 in 5 (18%) see information on cost of returns
- Just over 1 in 5 (22%) see information on conditions around cancellation.

Voluntary guidelines from the Statement of Principles[11] recommend that delivery charges, returns policy and any additional charges are summarised at checkout before paying and that any relevant delivery information is provided as soon as the order is made. Few e-retailers appear to be providing best practice information at this point. Almost 7 in 10 shops (68%) report that a timeline for dispatch is not provided and as few as 1 in 5 (16%) are informed which company will deliver their goods.

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[11] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW

Figure 13 – Information made available while placing an order at checkout

Q9. Which of the following information was made available to you when placing your order at the checkout with [RETAILER]?
Base: All responses (923)
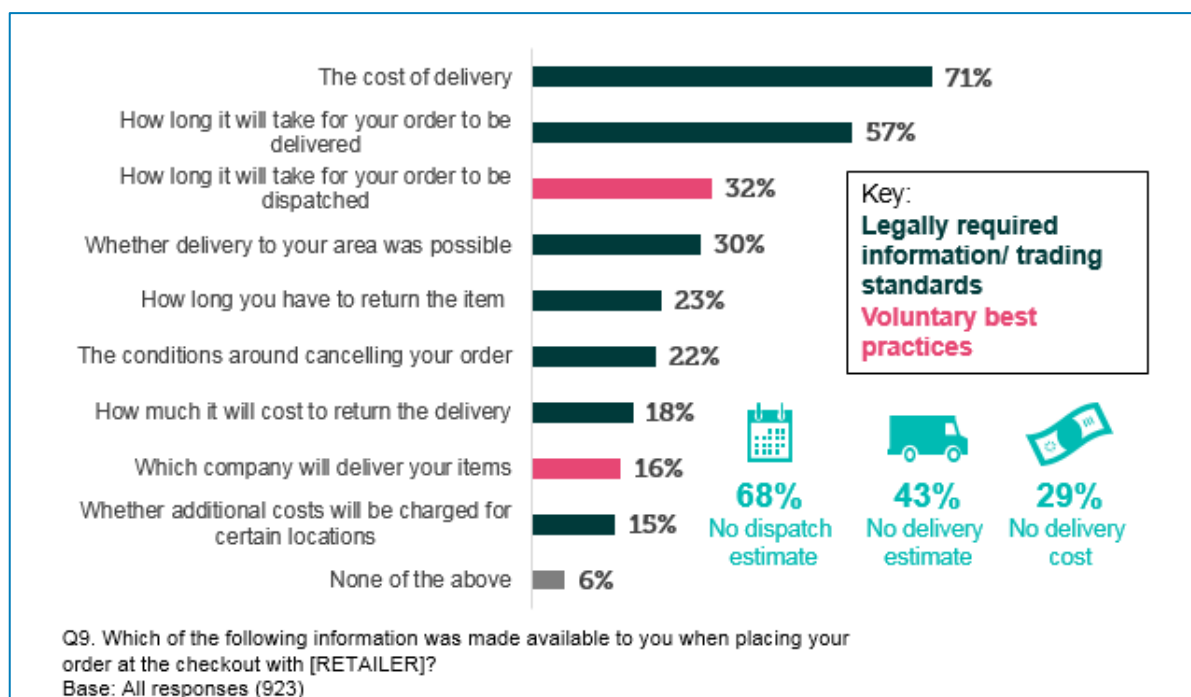
Where provided, shoppers find regulated and best practice information on delivery, returns and cancellations, to be useful (see Table 4 below). Just over 9 in 10 shoppers find information on who the delivery company is (91%), return window (92%) and return costs (90%) useful at this stage in their shop.

E-retailers who are already providing this information at checkout are doing it well; most consumers (over 9 in 10) find it easy to find and easy to understand.

Table 4 – Quality of information provided at checkout

Legally require information / trading standards Voluntary best practices	Clear and easy to understand	Useful at this stage	Easy to find
The cost of delivery	96%	95%	95%
Whether delivery to your area was possible	92%	91%	93%
Whether additional costs will be charged for deliveries to certain locations	88%	85%	88%
How long it will take for your order to be dispatched	93%	92%	92%
How long it will take for your order to be delivered	95%	94%	96%
How long you have to return the item	91%	92%	92%
How much it will cost to return the delivery	94%	90%	91%
The conditions around cancelling your order	89%	84%	90%
Which company will deliver your items	93%	91%	91%

Q10. Was the information provided on [INFORMATION SEEN AT CHECKOUT] – Clear and easy to understand – Useful at this stage – Easy to find?
Base: All responses where this information was reported at checkout: Cost of delivery (659), Whether delivery to area possible (279), Whether additional costs charged for certain locations (140), How long to be dispatched (295) How long to be delivered (528), how long to return item (210), cost to return the delivery (170), Conditions around cancelling (206), Which company will deliver (147)

We found no evidence that certain types of consumer are advantaged with regards to the information provided at checkout. Shoppers in rural and remote areas are no more likely to report seeing information on whether delivery to their area is possible (found in 3 in 10 (30%) shops in both urban and rural / remote areas), or if there are additional delivery charges for their area (16% of urban compared with 13% of rural and remote).

2 in 3 shops (67%) can select delivery type, though less than half (47%) can select a pick-up point and choice of delivery company is only available for 1 in 6 shops (17%) The Statement of Principles[12] advocates that e-retailers work with parcel delivery companies to increase the success of first time deliveries. This includes the ability to choose a convenient pick up point, timed delivery slots and options for redelivery.

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[12] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW

Consumers can select the delivery that best suits them (e.g. standard or next day delivery) in two-thirds (67%) of shops, and chose a pick-up point in almost half (47%) (see Figure 14).

Choosing a delivery company also has the potential to improve delivery success. Only 1 in 6 (17%) can choose the delivery company at checkout, though when given this choice 9 in 10 (91%) consumers find it useful.

Figure 14 – Choices available when placing an order

67%	47%	17%	11%
Ability to choose type of delivery	Ability to choose a central location from which to pick up	Ability to choose the delivery company	Inability to choose any of these options

Q11. Were you able to choose any of the following when placing your order?
Base: All responses (923)
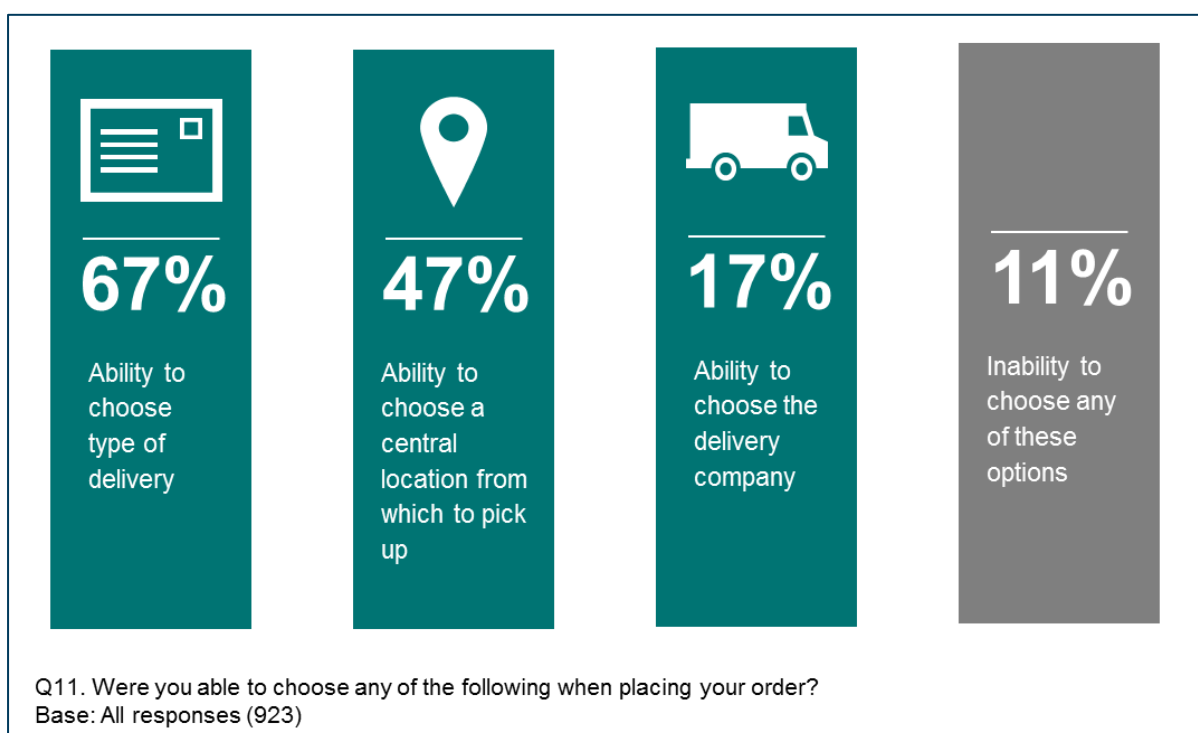
Most shoppers receive an order confirmation email (98%) with a delivery date. Regulated information on contact details, returns and cancellations is widely reported as missing

Regulation states that, within a reasonable timeframe of making the order, consumers must receive a contract in a form that can be kept but not altered (emails - the order confirmation), text and letter formats).

Nearly all shops receive an order confirmation (98%). Consumers report that email confirmations provide the following regulated information (see Figure 15):

- Just over 1 in 2 report that a delivery date is included (52%)
- Nearly 9 in 10 (86%) find no return cost information

- Three-quarters (75%) find no return information

- Nearly two-thirds (65%) find no information on who to contact

Figure 15 – Information provided in order confirmation
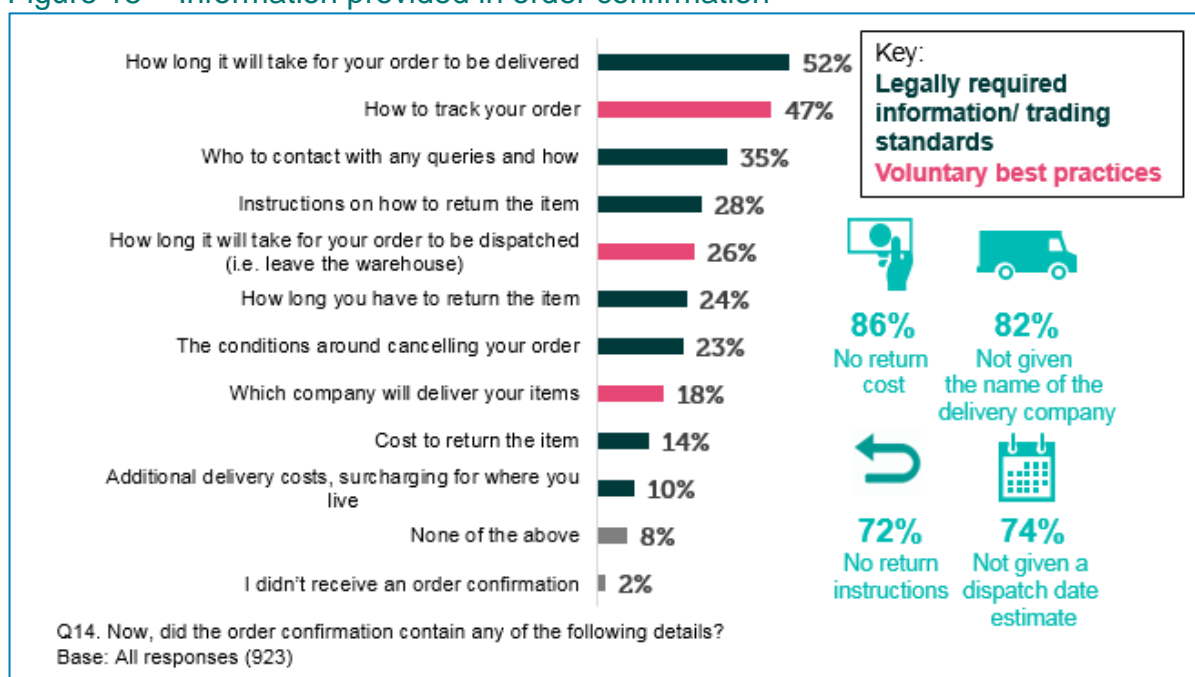
The Statement of Principles for parcel deliveries recommends relevant delivery information be made available on completion of the order or at dispatch. However, few shoppers report seeing best practice information: 4 in 5 shops (82%) are not given the name of the delivery company, and three-quarters (74%) are given no estimate of dispatch date.

As part of the independent audit we collected order confirmations from 31 e-retailers to check for regulated delivery and returns information. Delivery dates were found in most emails, although accessing information on who to contact, cancellations and returns often require clicking on links to visit the retailer website.

Consumers say they use confirmation emails to check the items ordered, the price, payment method and the estimated delivery date. However, many are likely to scan information and can miss key details. 2 in 5 consumers (42%) on Verve's in-house

consumer panel[13] skim read confirmation emails; presenting a challenge for e-retailers to convey high volumes of information in a way that is user friendly and easy to digest.

"Obviously they are useful - you can check that the order has gone through okay, and they usually include an expected arrival date. It depends who they are from whether I read in full or skim read - companies I use frequently only need skimming now - they say the same thing every time. I keep them until the product has been delivered and I have checked it is okay." Female, Aged 45-54

Whilst 1 in 5 (20%) of order confirmations provide the regulated basic rate or free phone line, a fifth (18%) of consumers are uncertain of the cost to call the retailer Regulation[14] states that where a telephone line is provided for queries about bought goods, the e-retailer should provide a telephone number that costs no more than the basic call rate. E-retailers do not have to provide a post sales phone line by law, though higher and basic rate numbers should have equal presence on any communications.

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[13] Verve Voices is Verve's in-house online community panel with a robust number of members with diverse profiles who are regularly invited to take part in qualitative and quantitative research and community activities.
[14] Telephone call charges to be made simpler – Ofcom 2013 - http://bit.ly/2tiaPRf

Looking specifically at the email confirmation, a telephone number is provided in half of shops. This is described as a basic rate or Freephone number in 1 in 5 shops (20%) (see Figure 16).

Figure 16 – Type of telephone number provided

Q15. Did your order confirmation include telephone contact details?
Base: All responses with an order confirmation (967)
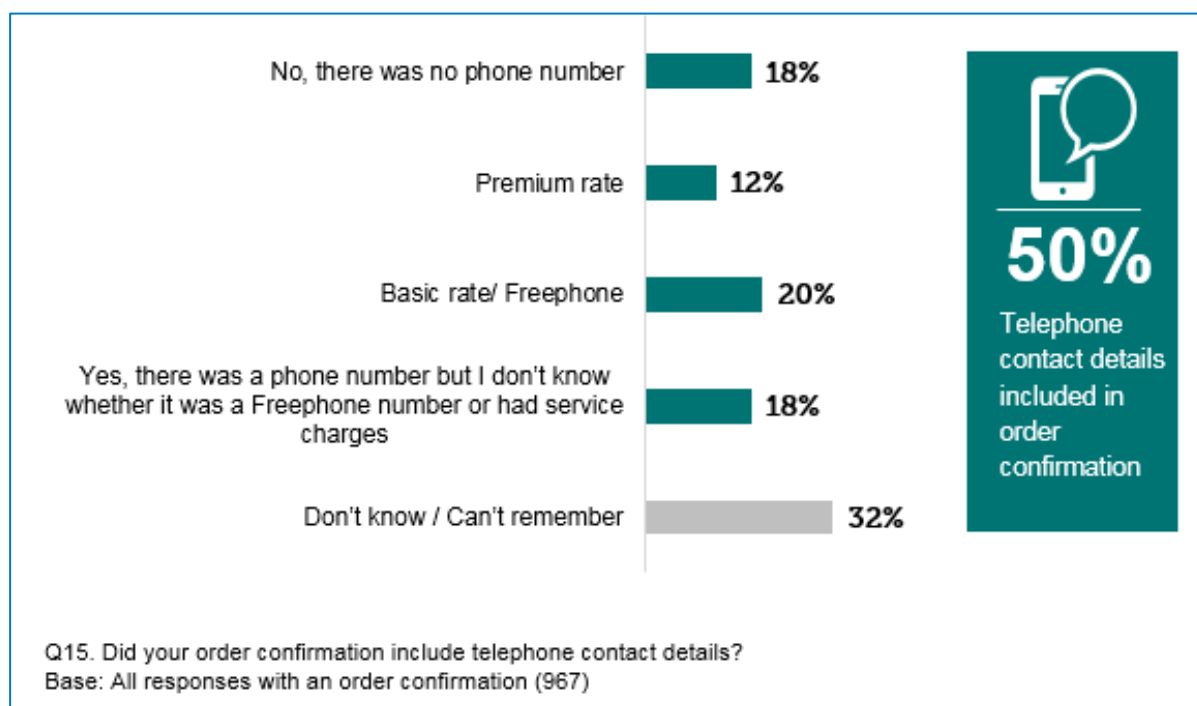
Consumers are uncertain what they will be charged for the call in just under 1 in 5 cases (18%), and more than 1 in 10 (12%) are provided with a premium rate number which is against regulation.

"The contact number should indicate if it is a Freephone number or not, and perhaps more of an idea when delivery will be would be useful." Female, 35-44, Remote location, Home Furnishings e-retailer

Ofcom have worked continuously to improve clarity and understanding around the phone charges associated with different telephone numbers[15]. However, if e-retailers are not legally obligated to provide a post sales help line (which must be free or basic rate), there is room for the law to be interpreted in different ways (e.g. to

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[15] Telephone call charges to be made simpler – Ofcom 2013 - http://bit.ly/2tiaPRf
Telephone charges made simpler next month – Ofcom 2015 - http://bit.ly/2rnREst

provide a premium rate number because it's not presented as a post-order phone line).

6 in 10 shops (62%) see the delivery and returns information at checkout as 'good', though this is fewer (57%) in rural and remote areas

3 in 5 (62%) shops rate the delivery and returns information provided at checkout as 'good' (a score of 8, 9 or 10 out of 10) (see Figure 17).

Figure 17 – Quality of information provided when placing order at checkout

3%
Poor

35%
Average

62%
Good

Q17. Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided when placing your order at the checkout?
Base: All responses (967)
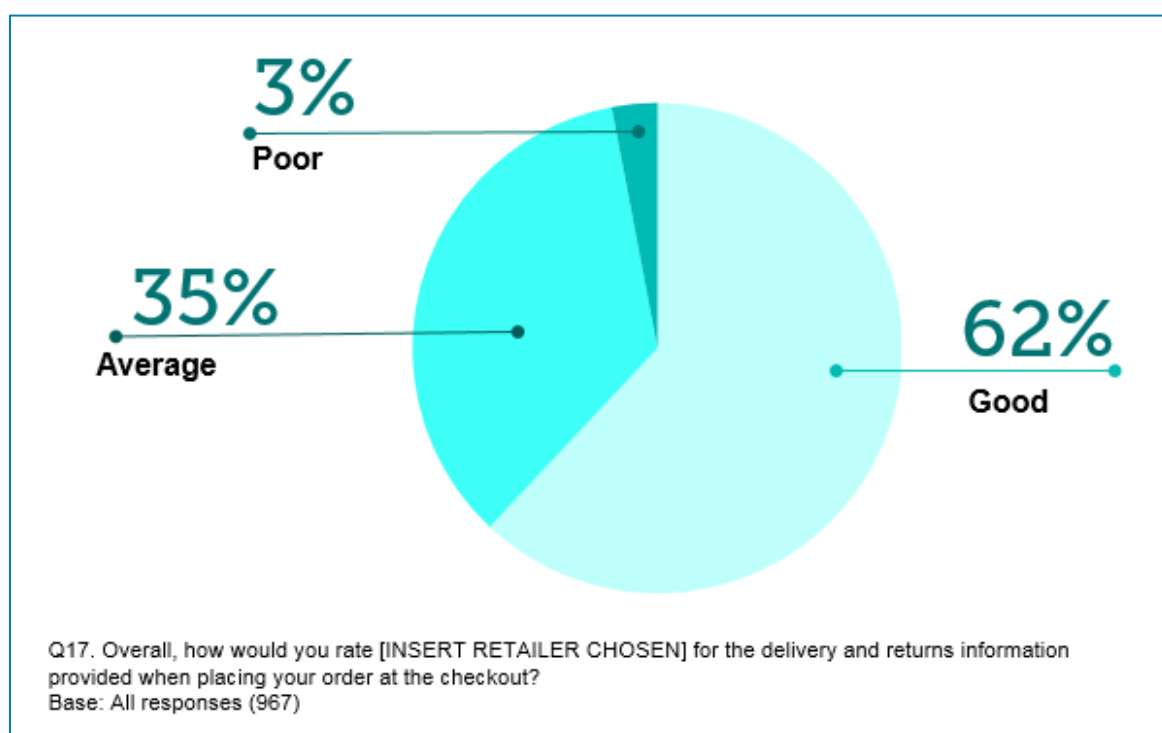
As with the browsing stage, online shoppers see delivery and returns information as good where clear and easy access to all the necessary information is provided before buying:

"All the details about the order and delivery were in the confirmation email." Female, 45-54, Urban location, Multi Category e-retailer

"Lists expected delivery date. Link to track order. Lists the cancellation/returns policy. Contact us link." Male, 25-34, Rural location, Multi Category e-retailer

"Everything seems to flow. You put items into the basket and when ready check the items and costs and then make payment via debit or credit or coupon. This makes it easy." Female, 65+, Urban location, Multi Category e-retailer

However, when the information is rated as poor, relevant facts are missing or unclear:

"Returns information is never clear or readily available." Female, 35-44, Remote location, Multi Category e-retailer

At checkout, suggested improvements from online shoppers relate to making delivery, contact and returns information available more often:

"There should be more information about returns and cost of returns rather than having to hunt down the information myself." Female, 35-44, Urban location, Multi Category e-retailer

"It could have listed the courier that would be used… It could have given some information to track the order, i.e. 'click here to track your order'. Finally, a method of contacting [e-retailer] would have been really useful, i.e. contact us via phone on ... or click here to contact us about your order." Male, 35-44, Rural location, Fashion & Homeware e-retailer

As with the browsing stage, older customers are more likely to be satisfied with the information given, but those living in rural and remote areas were less satisfied (see Table 5) - this may be due in part to them having fewer delivery options available (see later section on Ease of delivery).

Table 5 – Quality of information provided when placing order at checkout by key group

	All online shoppers	Gender		Age			Area	
		Male	Female	Under 35	35-54	55+	Urban	Rural & Remote
Good (8 to 10)	62%	59%	64%	59%	60%	74%	64%	57%
Average (5 to 7)	35%	38%	33%	38%	37%	24%	33%	40%
Poor (0 to 4)	3%	3%	3%	3%	3%	2%	3%	3%

Q17. Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided when placing your order at the checkout? Base: All responses (967), Male (437), Female (530), Under 35 (330), 35 to 54 (445), 55 plus (192), Urban (685), Rural & Remote (282).

Shopping Stage 3: Post check-out

Summary

E-retailers have no legal requirement to provide regulated information again during the delivery window. Post-checkout information is lacking despite the Statement of Principles recommendation for relevant delivery updates. Consumer awareness on delivery responsibilities and refunded costs is low.

- Just over 2 in 5 (43%) do not receive dispatch and delivery date notifications, with almost 9 in 10 (86%) receiving no information on how to rearrange or cancel their order.
- Half of consumers are incorrect or unclear on who to contact with queries about their delivery with 1 in 8 (13%) being told to contact the delivery company with queries.
- Less than half (46%) of shops receive a delivery confirmation.
- Just over 8 in 10 shoppers (83%) are confused about refunds: only 1 in 6 (17%) understand that the basic delivery cost is included in the refund by law.
- Nearly 9 in 10 (85%) report that receiving online deliveries is 'easy'. Safe spaces, trusted neighbours, convenient pick up locations and deliveries to work make parcel delivery more flexible. Those in remote areas however report these options are not always available to them, which makes receiving deliveries harder.

Post check-out, pre-delivery information is lacking – just over 4 in 10 (43%) do not receive dispatch and delivery date notifications

Regulations focus on the delivery and returns information provided upfront before the order is placed - updating the consumer on the status of their order becomes voluntary after the order is placed. The Statement of Principles[16] states that e-retailers should aim to provide consumers with relevant delivery information at the time the order is completed and / or dispatched.

Consumers report that information on the status of their delivery post order is often lacking (see Figure 18). Nearly two thirds of shops (62%) report that an update is

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[16] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW

provided on when the delivery will arrive, leaving just over 4 in 10 (43%) cases where this key information is not provided.

While waiting for delivery:

- Just over 4 in 10 shops (43%) do not receive confirmation of item dispatch
- Almost 9 in 10 shops (86%) receive no information on how to rearrange a delivery or cancel an order

Figure 18 – Information provided while waiting for delivery
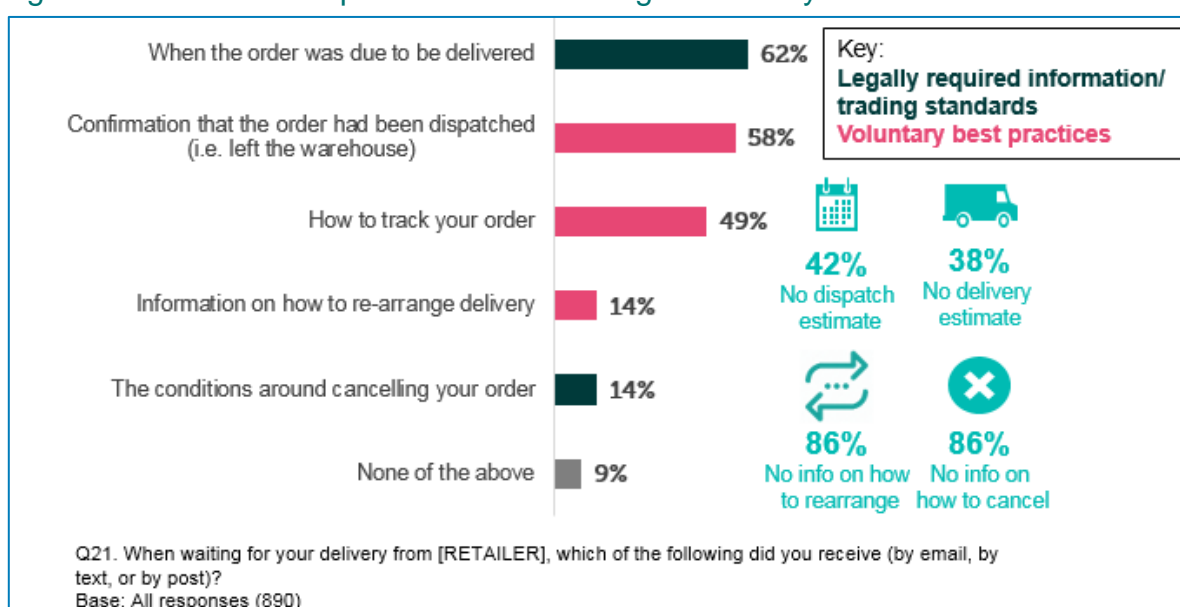
Q21. When waiting for your delivery from [RETAILER], which of the following did you receive (by email, by text, or by post)?
Base: All responses (890)

NB: Whilst a legal requirement to provide this information pre-order, e-retailers are not legally obliged to provide this information again post order.

Where relevant delivery information on order status is received during the delivery window, most consumers find it useful (92% on average). Consumers agreed that updates on when their order was due to be delivered and how to track an order are particularly useful (see Table 6).

"Any information around returns would have been useful. Saying that there is an easy facility to cancel the order before it's despatched." Female, 35-44, Remote location, Multi Category e-retailer

"More clear directions on how to return an item, not just how long you have to do so. More in-depth information regarding the ways by which you can return things." Female, 25-34, Urban location, Multi Category e-retailer

Table 6 – Quality of information provided while waiting for delivery

Legally require information / trading standards Voluntary best practices	Clear and easy to understand	Useful at this stage	Easy to find
Confirmation of dispatch	96%	94%	96%
When the order was due to be delivered	96%	96%	97%
How to track your order	97%	96%	96%
The conditions around cancelling your order	93%	90%	93%
Information on how to re-arrange delivery	93%	86%	89%

Q22. Was the information provided on [INFORMATION SEEN WHILE WAITING FOR AND RECEIVING DELIVERY] – Clear and easy to understand – Useful at this stage – Easy to find?
Base: All responses where this information was reported at checkout: Confirmation of dispatch (504), when the order was due to be delivered (549), how to track your order (433), the conditions around cancelling your order (129), information on how to re-arrange delivery (130).

In 5 out of 10 (50%) shops, consumers are incorrect or unclear about who to contact with queries about the delivery of items received

Regulation states that e-retailers must provide clear and upfront contact details prior to the order being made and that the goods are the responsibility of the e-retailer (rather than the delivery company) until they reach the consumer[17].

We asked if shoppers are told who to contact with questions or issues during delivery (see Figure 19). Whilst consumers say they are told to contact the retailer in half of shops, 2 in 7 (28%) are misinformed or unclear: 1 in 8 are told to contact the delivery company (13%), and 1 in 7 (15%) don't know who they should contact.

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[17] The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 - http://bit.ly/2rWO0Vo

Figure 19 – Who to contact with questions or issues

Q23. Were you told who to contact if you had questions or issues with your delivery or the items received?
Base: All respondents (890)
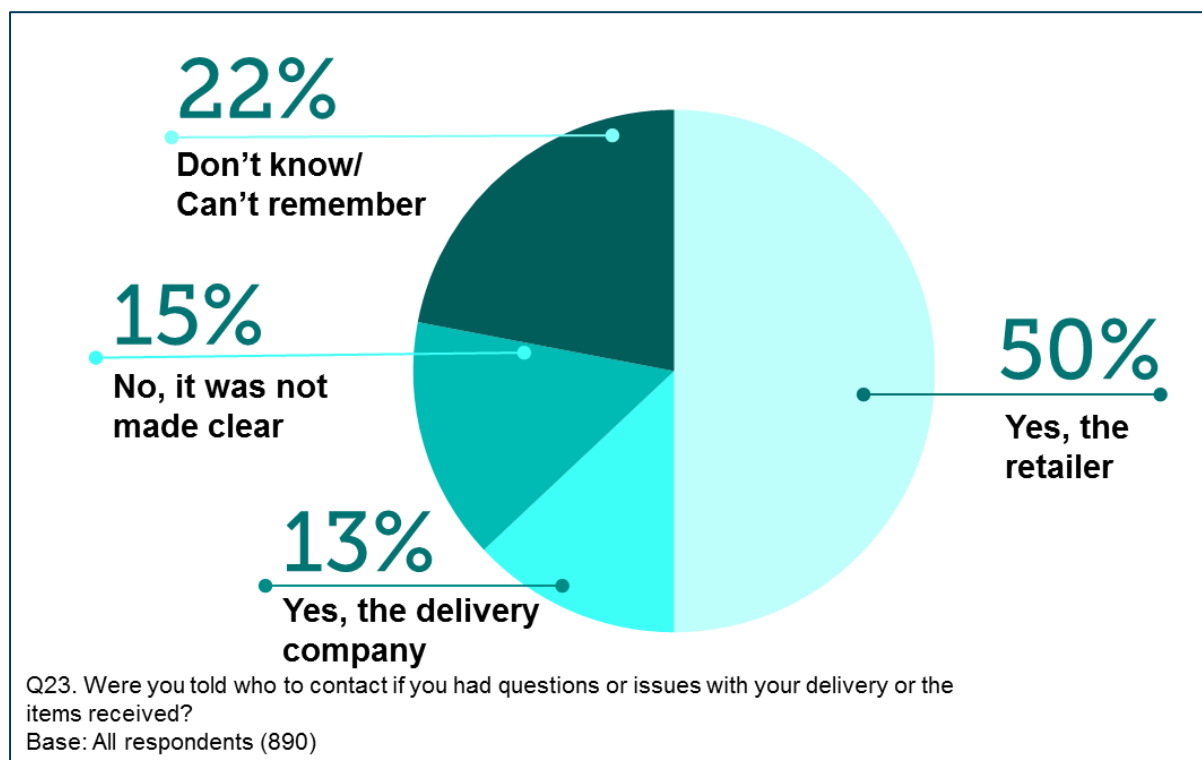
Younger shoppers (under 35), are more likely to be incorrect or unclear on who to contact. This could in part be due to the increase in scanning as we read more digitally[18]and supports the need for clear and simple display of delivery responsibilities and contact details.

Almost 9 in 10 (88%) of deliveries arrive on time

Regulation states that goods must be delivered within 30 days of the order being placed, unless agreed with the consumer. In cases late delivery, the consumer has the right to cancel the order.

Consumers claim the delivery arrives on time in almost 9 in 10 shops (88%) (see Table 7). Expected delivery time is met more often for those in rural locations (93% in rural and remote areas) than in urban locations (86%).

For the 1 in 10 cases (9%) where the delivery is reported as late, this tends to be a delay of a few days rather than a week or more.

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[18] How do we Read Online: The Effect of the Internet on Reading Behaviour by Herath, Channa – 2010 - http://bit.ly/2rek1FD

Table 7 – Whether parcels are delivered on time by key group

	All online shoppers	Gender		Age			Area	
		Male	Female	<35	35-54	55+	Urban	Rural & Remote
It arrived on time	88%	87%	88%	82%	90%	93%	86%	93%
It was 1-4 days late	6%	6%	6%	9%	5%	2%	6%	6%
It was 5+ days late	2%	2%	2%	5%	1%	2%	3%	0%
Not yet received order	2%	3%	1%	3%	2%	2%	3%	0%
Did not receive order confirmation	2%	1%	2%	2%	1%	1%	2%	0%

Q25. Was the parcel delivered within the delivery window specified in your order confirmation?
Base: All responses (967), Male (437), Female (530), Under 35 (330), 35 to 54 (445), 55 plus (192), Urban (685), Rural & Remote (282)

Post-delivery follow-ups are not received in many cases - 1 in 2 (46%) do not receive a delivery confirmation

E-retailers are not legally obliged to provide delivery follow up information. The Statement of Principles recommends that e-retailers provide delivery information once the order is complete and consumers are given the opportunity to feedback on their delivery experience.

Voluntary best practice post-delivery follow up is lacking across most e-retailers (see Figure 20):

- Almost 1 in 2 shops (46%) do not receive a delivery confirmation
- 3 in 5 shops (62%) receive no reminder of how to get in touch with queries
- Just over 1 in 2 (51%) receive no information on how to get a refund, and 4 in 5 no information on what will be refunded. Just over 4 in 5 shoppers (83%) are largely confused about what's included in a refund.

Figure 20 – Information provided post-delivery

The confirmation of your delivery — 54%
How to return your item — 50%
How to get in touch with any queries or complaints — 38%
Where the order had been delivered to — 26%
What will be refunded to you if you return your item — 20%
None of the above — 14%

Key:
Legally required information/ trading standards
Voluntary best practices

80% No info on what will be refunded
62% No info on how to get in touch
50% No info on how to return
46% No delivery confirmation

Q26. Having received your delivery, have you been provided with information about regarding…?
Base: All responses (857)

NB: Whilst a legal requirement to provide this information pre-order, e-retailers are not legally obliged to provide this information again post order.

Post-delivery notification is a key opportunity to help consumers understand their rights in this area. At least 9 in 10 (95% on average) shoppers find post-delivery reminders of delivery and returns information easy to access and useful when provided at this point in the shop (see Table 8). Details of what will be refunded is a particularly important, with 96% agreeing it is useful post order.

Table 8 – Quality of information provided post-delivery

Legally require information / trading standards Voluntary best practices	Clear and easy to understand	Useful at this stage	Easy to find
How to return item	97%	93%	96%
How to get in touch with queries or complaints	95%	94%	97%
What will be refunded to you if you return your item	98%	96%	95%
The confirmation of your delivery	98%	96%	97%
Where the order had been delivered to	93%	94%	95%

Q27. Was the information provided on [INFORMATION AFTER DELIVERY] – Clear and easy to understand – Useful at this stage – Easy to find?
Base: All responses where this information was reported: How to return item (426), How to get in touch with queries or complaints (326), What will be refunded to you if you return your item (175), The confirmation of your delivery (459), Where the order had been delivered to (222).

Whilst two-thirds (66%) rate delivery and returns information post-checkout as 'good', consumer experience will improve if more e-retailers follow voluntary best practice guidelines

Consistent with the browsing and buying stages, older customers are more likely to rate returns and delivery information post checkout as 'good' (score of 8, 9 or 10 out of 10) (see Table 9). Those in urban locations are also more likely to rate delivery and returns information as 'good' with a small but significantly higher proportion of rural and remote shoppers saying information is 'poor'.

Table 9 – Quality of information provided when waiting for delivery by key group

	All online shoppers	Gender		Age			Area	
		Male	Female	Under 35	35-54	55+	Urban	Rural & Remote
Good (8 to 10)	66%	65%	67%	61%	67%	76%	**68%**	61%
Average (5 to 7)	31%	33%	29%	35%	31%	23%	30%	33%
Poor (0 to 4)	3%	2%	4%	4%	2%	2%	2%	**6%**

Q28. Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided when waiting for delivery?
Base: All responses (890), Male (393), Female (497), Under 35 (308), 35 to 54 (411), 55 plus (171), Urban (630), Rural & Remote (260).

A lack of information during the delivery window leaves shoppers feeling frustrated:

"They provided no means of contacting them as I expected the delivery a few days ago. I sent messages via their online messaging system but had no replies." Male, 35-44, Rural location, Fashion & Homeware e-retailer

"Not enough communications while waiting for delivery, and I didn't receive an invoice or returns info with my order." Male, 45-54, Rural location, Multi Category e-retailer

"[I'd need] more information on how to return by post. The only My Hermes return place is 12 miles away and not in a direction I travel so this is a real pain if I need to make returns." Male, 45-54, Rural location, Multi Category e-retailer

Consumers tell us that being kept well informed is key to a good delivery experience:

"Everything I needed to know was available to me." Female, 35-44, Urban location, Multi Category e-retailer

"The delivery process was swift and accurate. I [received] an outstanding service through emails, notifying me of the processes involved and when to expect my parcel." Male, 25-34, Urban location, Multi Category e-retailer

"It was written in clear English using no jargon." Female, 35-44, Remote location, Multi Category e-retailer

Consumers would like e-retailers to provide more updates on the status and location of their order:

"Provide more text alerts about delivery at different stages of delivery and giving updates on ETA." Male, 45-54, Urban location, Multi Category e-retailer

"It would have been even better if an approximate time (as opposed to just the day) was provided, or if it was possible to track the delivery location in real time." Male, 35-44, Rural location, Multi Category e-retailer

Additional charges

Any additional charges paid are for a premium delivery service – 1% of those in rural and remote areas paid additional charges due to location

Regulation states that e-retailers must provide clear upfront information on any delivery charges; they are legally obliged to provide free or standard delivery to remote or rural areas if provided to Mainland UK. In addition, the Statement of Principles for parcel deliveries recommends any additional charges for delivery based on geographic location must be clearly justified and reflect the true cost of delivery.

Online shoppers were asked if they paid additional charges for delivery. In nearly two-thirds of shops (64%) no additional fees are paid on top of standard or free delivery. The majority (more than 90%) of those who paid additional fees did so to receive a premium delivery service (next day, a faster delivery or for a particular delivery slot).

A minority of shops in rural and remote areas (1%) report additional charges due to the delivery address being outside the retailer's delivery area. Those in rural and remote areas are no more likely to report paying extra for premium delivery services.

Younger shoppers are more likely to pay additional charges to receive premium delivery services, with those under 35 twice as likely to pay for premium delivery than those over 55 (in 48% of shops compared to 24% of shops, respectively). This group are less likely to have a willing neighbour to take in deliveries, less likely to have a safe space and more likely to be out at work during standard delivery times. We explore this further in the next section.

Ease of receiving a delivery

Receiving online deliveries is rated as 'easy' for most shoppers (85%) and pick-up points have further helped. However, consumers in remote areas are disadvantaged as they have fewer options available

In general, when shopping online, most consumers (85%) say they find it easy to receive online deliveries (see Figure 21) - only 2% report they find it difficult.

Figure 21 –: Ease or difficulty of receiving online deliveries

NET Easy (7-10): 85%
33%
21%
19%
12%

NET Difficult (0-4): 2%
7%
4%

Legend:
- 10 - Extremely easy
- 9
- 8
- 7
- 6
- 5
- 4
- 3
- 2
- 1
- 0 - Extremely difficult

QS9. How easy or difficult is it for you to receive online deliveries of small and medium items?
Base: All respondents (2285)
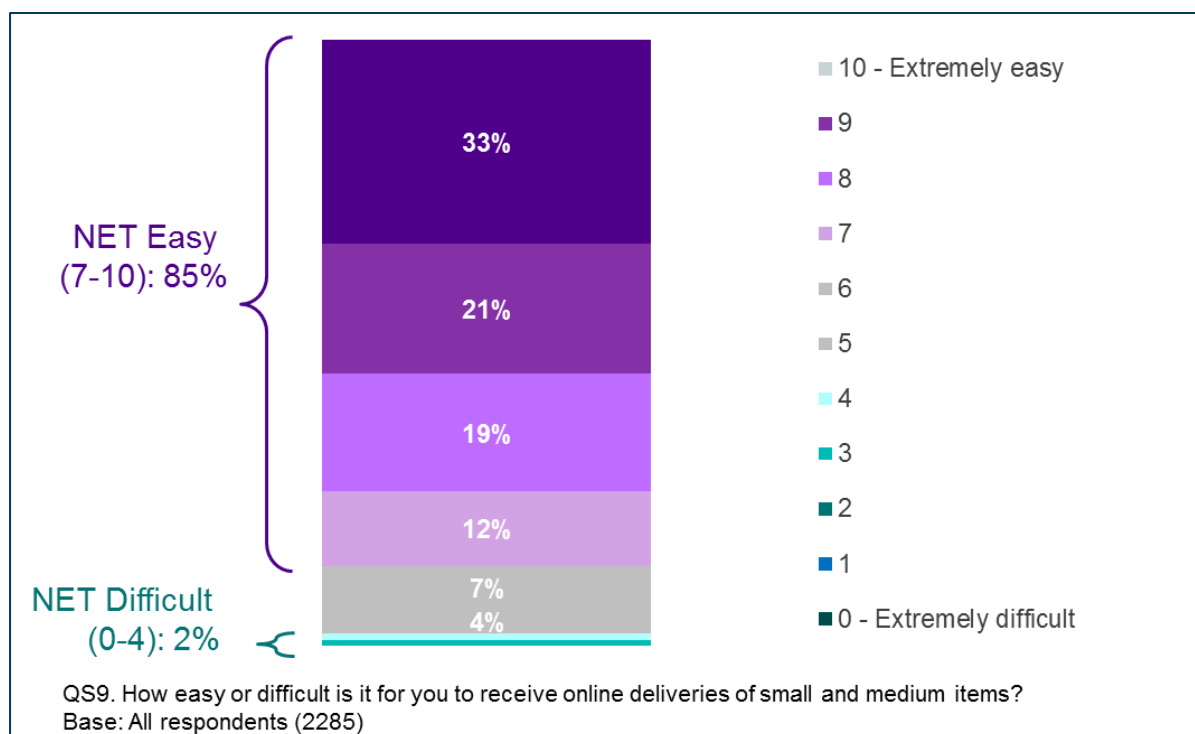
We find little variance between online shoppers with regards to access and quality perceptions of consumer rights information, although there are differences when looking at *why* the receipt of online deliveries is easy or difficult (see Figure 22).

Consumers in remote areas have fewer options available to them when receiving online deliveries

Online shoppers living in remote areas appear to be disadvantaged in terms of receiving deliveries – they are significantly less likely to:

- be in or to have someone at home to receive the delivery
- have a neighbour who will take in the delivery
- have their delivery sent to their workplace
- use pick-up points such as in-store collection, Collect+ and parcel lockers

Consumers in urban areas are significantly less likely to have a safe space for their parcel to be left than those in rural and remote areas.

Figure 22 – Why it's easy to receive online deliveries

QS10. You mentioned that it's easy for you to receive parcel deliveries, why is this?
Base: All respondents who find it easy to receive deliveries: Urban (1350), Rural (486), Remote (256)
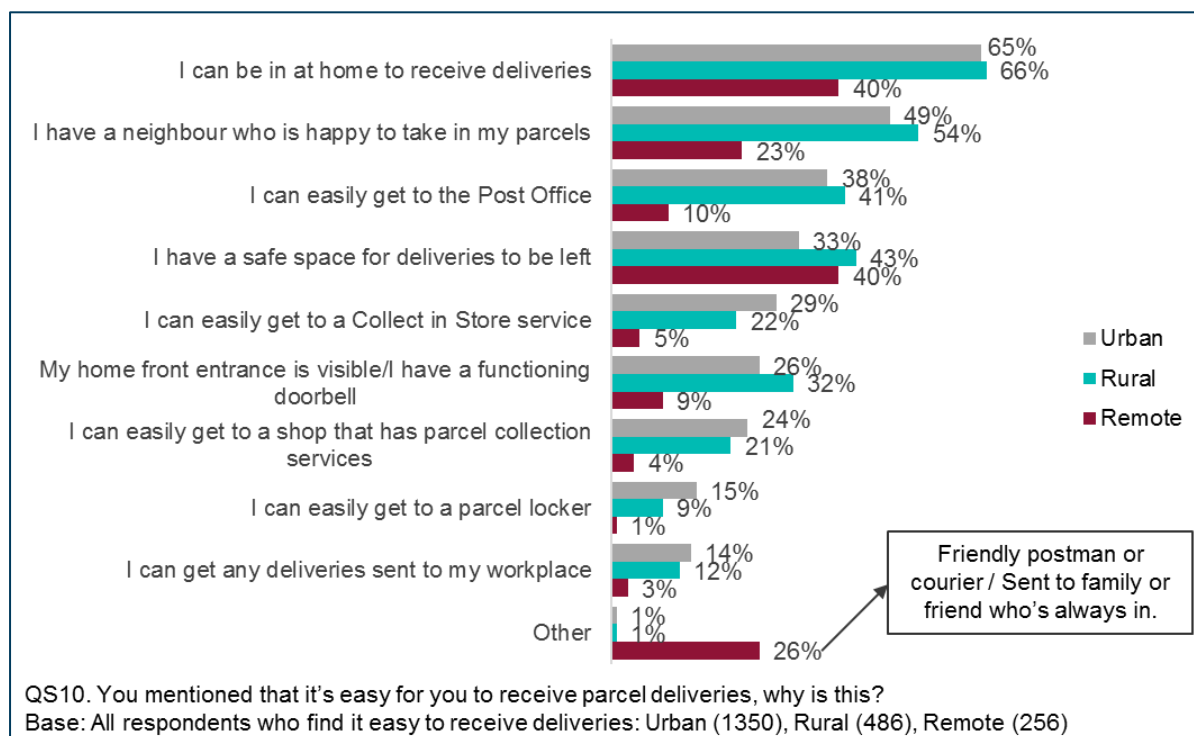
Those who can be in at home are better able to receive parcel deliveries

Just under two thirds (62%) of online shoppers say that receipt of delivery is made easy by their ability to be at home when the delivery is made. Shoppers over 55 years, those with a disability and those on household incomes under £50k or on income support are more likely to be able to receive their deliveries at home (see Figure 23). Inability to be home during standard delivery times is reported as the main barrier for 7 in 10 (73%) consumers.

Just over 1 in 10 (12%) online shoppers say deliveries are made easier by sending parcels to their place of work, particularly those with household incomes of £50k and higher, those aged under 55, and those in urban areas.

Figure 23 – Why it's easy to receive online deliveries

Can be at home

Total	Under 55	Over 55	Disability	No Disability	Under £50k	Over £50k	On income support	Not on income support
62%	60%	66%	67%	60%	65%	59%	67%	60%

Can send to work

Total	Under 55	Over 55	Urban	Remote	Below £19k	£20k - £49k	Over 50k
12%	17%	3%	13%	3%	5%	13%	26%

Base: All respondents who find it easy to receive deliveries: Total (2092), U55 (1443), 55+ (649), Disability (560), No Disability (1396), Under £50k (1447), Over £50k (385) Income support (597), Not income support (1419), Urban (1350), Rural (486), Remote (256)

Safe spaces and trusted neighbours are relied upon by those who can't be at home to receive deliveries

Just under half (47%) of shoppers can receive deliveries using their neighbours; over 35s and those living in rural areas the most likely to have this option available to them (see Figure 24).

Shoppers aged over 55 and living in rural and remote areas are more likely to live in locations with a safe space where parcels can be left. The higher the social income, the more likely this is to be an option; just over 4 in 10 (42%) of consumers with household incomes of £50k+ rely on safe spaces compared to just over 3 in 10 (32%) with incomes of less than £20k.

Figure 24 – Why it's easy to receive online deliveries

Can leave parcels with neighbours

Total 47% | Under 35 40% | Over 35 50% | Urban 49% | Rural 54% | Remote 23%

Can leave parcels in a safe space

Total 37% | Under 55 34% | Over 55 41% | Urban 33% | Rural 43% | Remote 40% | Below £19k 32% | £20k - £49k 37% | Over 50k 42%

Base: All respondents who find it easy to receive deliveries: Total (2092), U35 (1469), 35+ (1623), Below £19k (537), £20k£50k (910), £50k (385) Urban (1350), Rural (486), Remote (256)
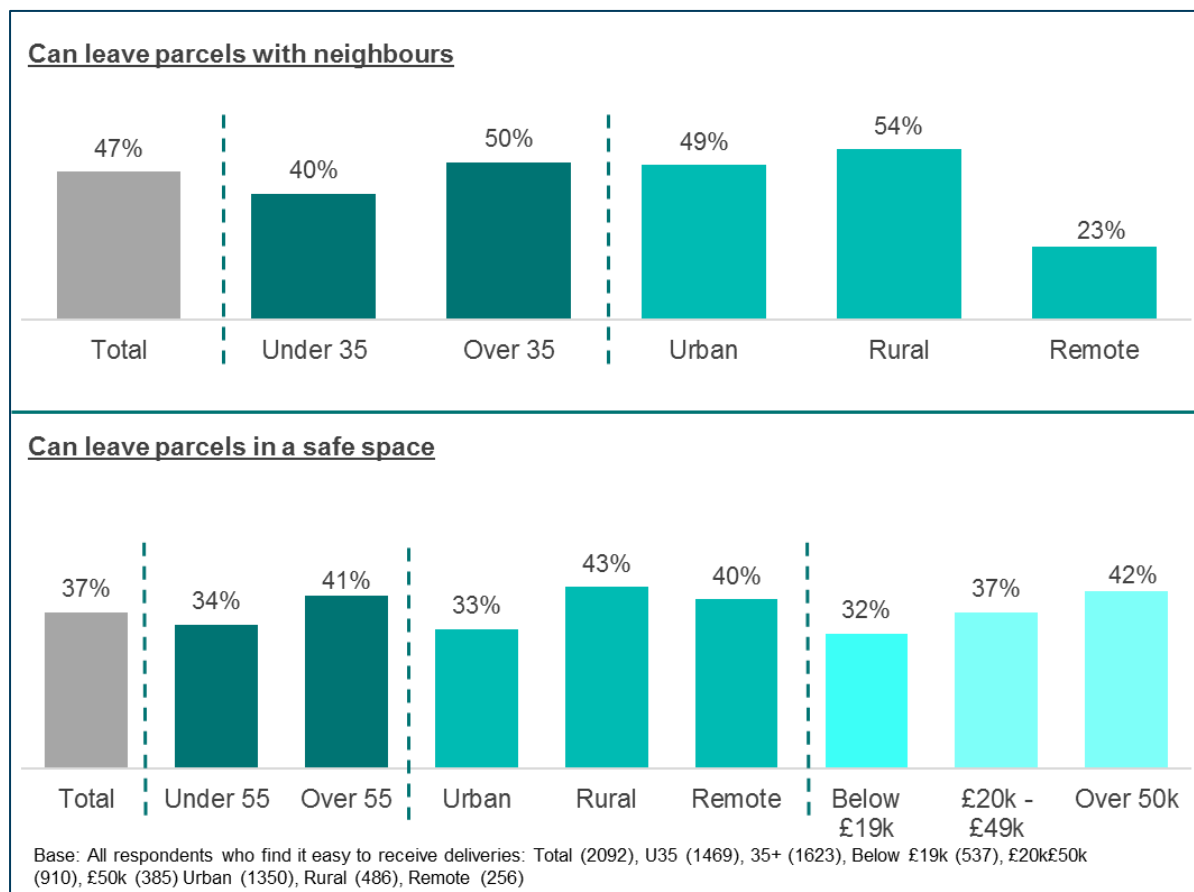
Convenient pick-up points are an essential service for consumers, particularly those who cannot be at home, have no neighbour or safe space options

Pick-up points are crucial with just under half of shoppers (46%) saying they make receipt of online deliveries easy (see Figure 25). This is true for all groups including those with disabilities (45%), and those on income support (43%).

However, consumer living in remote areas are significantly less likely than both rural and urban shoppers to see pick-up points as helpful: a review of pick-up points for remote and island areas is a potential area of consideration for Citizens Advice.

Figure 25 – Why it's easy to receive online deliveries

Can access a central pick-up point

- Total: 46%
- Urban: 51%
- Rural: 49%
- Remote: 15%

Base: All respondents who find it easy to receive deliveries: Total (2092), Urban (1350), Rural (486), Remote (256)
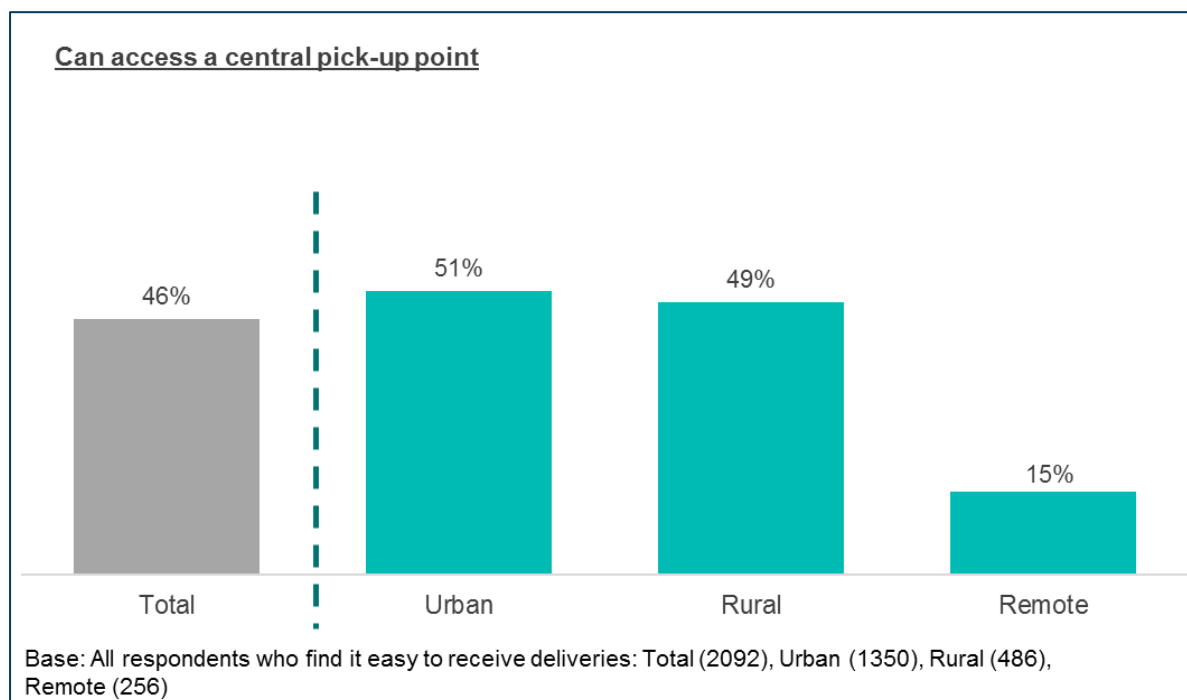
Amount refunded

8 in 10 online shoppers (83%) are confused about what should be included in a refund; e-retailers need to provide clear information on inclusion of standard delivery charges

Regulation states that key information should be provided upfront on returns and refunds. The refund must include the cost of standard delivery (unless delivery was free) and the e-retailer must specify upfront if the consumer is liable to pay the cost of the return (if not specified, the consumer has the right not to pay return costs).

To determine online shoppers' understanding of their rights when returning an item, we asked what would be refunded where £5.00 for Next Day delivery is paid instead of £2.50 for Standard Delivery. Consumer rights state that unless otherwise specified, the retailer is liable to refund the cost of the item plus standard delivery.

Just under half (48%) of online shoppers incorrectly answer that the refund covers the item cost only and a quarter (25%) that it includes the full cost of next day delivery (see Figure 26). Only 1 in 6 (17%) correctly answer that the refund includes the cost of standard delivery.

Figure 26 – What is thought to be included in refunds

10% Don't know/ Can't say

25% Product and cost of Next Day delivery

17% Product and cost of Standard delivery

83% answer incorrectly or say they don't know

48% Product

Q32. Finally, if you were to purchase another item from ... and paid £5.00 for Next Day delivery instead of £2.50 for standard delivery, what would you expect to be refunded to you if you were to return your order? Base: All respondents (890)

There are no major differences in knowledge of refunds by age, gender, geographic area, income or disability.

Throughout the shopping process, information on refunds is lacking:

- **Selecting items** – shoppers are clicking away from product pages in 8 in 10 shops (81%) to find information on delivery and returns
- **At checkout** – fewer than 1 in 5 of shops (18%) find that information is present on the cost to return the item
- **Confirmation email** - the cost to return the item is found in less than 1 in 6 of shops (14%)
- **Post-delivery** – 1 in 5 shops (20%) report receiving information on what will be refunded if they return an item

Guidance on Money Saving Expert[19] with regards to parcel delivery rights states that *'You may have to ask for a refund on the delivery charge as most shops won't include this as standard – so chase if you don't get it.'*. Clear and simple information on what will be refunded and the holding of retailers to this requirement is a clear area for development.

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[19] Parcel Delivery Rights, Money Saving Expert – December 2015 - http://bit.ly/2rnRAZR

Conclusions

Are e-retailers meeting their legal obligations?

The research set out to evaluate the extent to which e-retailers are abiding by the regulations in place for the online sale of goods. These regulations are in place to ensure shoppers are clear of their rights and confident they will receive an efficient service at a fair price.

The research shows that e-retailers are meeting their legal obligations in part. All e-retailers abide by at least some of the regulations with clear product descriptions and fundamental information on delivery costs, delivery options, returns conditions and cancellation window displayed on their website. However, a minority of online traders (7 out of 25) have all or most legally required information in place on their website. This same minority also adhere to some of the voluntary best practices laid out in the Statement of Principles for Parcel Delivery (for example, providing delivery and returns information on product pages, sending dispatch and delivery confirmations, providing the name of the parcel delivery company).

Below we explore the answers to the key research questions.

Are the legally required costs and details of delivery, cancellation and returns displayed on retailer websites?

All audited e-retailers display full product descriptions and total costs including returns on their websites. Regulated information on the returns window, conditions of return and time taken for refund are found and clearly displayed in the majority (at least 23 out of 25 retail websites). Delivery timelines and options (standard or premium) are also found on most e-retailer websites (25 and 24 e-retailer websites respectively).

Are e-retailers fair and transparent with information on the delivery of goods?

E-retailers are providing consumers with accurate information about the timescale of their delivery. 9 out of 10 of deliveries (88%) arrive on time.

Areas covered by standard delivery and delivery prices for rural and remote areas are not found in approximately half of e-retailer websites audited – information most likely to disadvantage those living in rural and remote areas. Whilst this information is lacking or difficult to find on the websites, we found no evidence of additional charges due to geographic location. Any extra charges paid during the research period are for premium delivery services.

There are many areas where missing or ambiguous information is contributing to poor awareness of consumer rights. With only 1 in 3 websites audited specifying that refunds include basic delivery costs (where paid), it is not surprising to find that 8 in 10 shoppers (83%) are unable to say what should be included in a refund.

Are consumers given clear instructions on how to follow up with any queries and who to contact?

Contact and complaints information is a key area requiring focus. Auditors found this harder to find on e-retailer sites than delivery and returns information. Whilst all 25 websites provide different channels for contact, details of the cost of calling are not found on one third of audited sites. This information is rated as unclear in one quarter of e-retailers (4 out of 17) who display call charge information on the website.

Only 1 in 3 (8) e-retailers audited specify on their website that they are responsible for the delivery until it reaches the consumer. Half of consumers are incorrect or unclear as to the fact that the retailer should address any queries with regards to delivery, with 1 in 8 (13%) saying they are told to contact the delivery company.

Is information easily located at key points in the online shop?

The regulations state that clear, upfront information must be provided before an online order is placed. The Statement of Principles recommends that delivery charges, returns policy and exemptions or additional charges are clearly shown on all product pages, home pages and at checkout before paying. It also suggests that relevant delivery information is provided when the order is dispatched or completed.

Browsing and selecting products:

Whilst we have seen that certain required information is displayed on the website with regards to delivery and returns information, consumers find this information on the product pages in fewer than 1 in 5 shops (19%). The top performing retailers (those receiving the highest ratings in both audit and diary), do provide key delivery and returns information on their product pages.

Fewer than 1 in 2 shops (48%) are given an estimated delivery date. 1 in 3 shops (35%) are not provided with stock availability when browsing – whilst not legally required, this information is key to understanding likely delivery timelines.

At checkout:

Just under half of consumers report in their diaries that legally required information is not provided at checkout: 2 in 5 (43%) are not given a delivery date, 1 in 3 (29%) no final cost of delivery and just over 4 in 5 (82%) are missing return and cancellation information including the cost of returns. Whilst the Statement of Principles recommends the provision of relevant delivery information on order confirmation - almost 7 in 10 (68%) report that a dispatch date is not provided and less than 1 in 5 (16%) receive information on who the delivery company will be. Where relevant delivery information is provided 9 in 10 consumers (90% or higher) find it useful.

Post order delivery window:

E-retailers have no legal requirement to provide delivery and returns information again during the delivery window (with the exception of the order confirmation). Post-checkout information is lacking despite the Statement of Principles advocating that relevant delivery information is provided during delivery. Just over 2 in 5 (43%) do not receive dispatch and delivery date notifications, with almost 9 in 10 (86%) receiving no information on how to rearrange or cancel their order.

Whilst the Statement of Principles for parcel deliveries recommends that e-retailers provide a post-delivery follow-up, less than half (46%) of shops receive a delivery confirmation. Just over 1 in 2 (51%) receive no refund information.

Are the choices in delivery options helping consumers get a reliable and affordable parcel delivery?

Delivery options are not found at checkout as standard. Whilst 2 in 3 (67%) can select the type of delivery (standard or premium), fewer than half (47%) can opt for a convenient pick up point and less than 1 in 5 (17%) can select the delivery company. 9 in 10 consumers (90% on average) who've had the choice of delivery company find it useful at this stage in the shop.

Nearly 9 in 10 (85%) report that receiving online deliveries is 'easy'. Safe spaces, trusted neighbours, convenient pick up locations and having deliveries sent to work are key ways in which parcel deliveries have become more flexible. Those in remote areas have fewer options available to them however. They are less likely to be in, to have a neighbour willing to take in parcels, to use pick up locations or send parcels to work.

Key recommendations

This research indicates that e-retailers are not meeting with all their legal obligations, and recommended best practice on delivery is lacking in later stages of the shop.

Previous research has found that though improving, significant numbers of shoppers still abandon the purchase at checkout in the UK[20], due to hidden charges or browsing behaviours[21]. Online shoppers seek easier, more flexible and convenient solutions such as greater use of tracking and collection points, and clearer pricing around delivery and returns[22].

We have found that awareness of certain consumer rights (such as refund costs, call charges and the delivery responsibilities of the e-retailer) is low. Provision of information to consumers at the right time and in the right format is needed to increase this awareness and to ensure that consumers are confident of their rights when queries or dispute arises.

The research findings point to several key areas of improvement.

Improved display of information

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[20] IMRG Quarterly Benchmarking Report February to April 2016 - http://bit.ly/2rX1TCR
[21] Worldpay global online shopper insight report – December 2014 - http://bit.ly/2rsbQom
[22] Breaking Blue, The Future of Consumer Needs for Postal Services 2016 - http://bit.ly/2sYSxoO

Top performing retailers (achieving high scores in both audit and diaries) provide legally required information on delivery and returns in an easily accessible format. They minimise the number of clicks by positioning all the necessary information on the product pages. Information is displayed using minimal copy and visual aids, such as icons and logos that could help highlight different types of delivery and delivery companies used with the option to click for more detailed information. This approach effectively communicates both regulated and voluntary information in a clear and transparent format.

Provision of information at key stages in the shop

Regulation states that key delivery, returns, cost and contact detail are provided upfront and before checkout. Whilst the Statement of Principles advises that relevant delivery information is summarised at checkout and on order completion, e-retailers are not taking these recommendations on board in many cases.

In the diary research, consumers call for e-retailers to provide delivery and returns information at key stages throughout the online shopping process.

"It could have listed the courier that would be used… It could have given some information to track the order, i.e. 'click here to track your order'. Finally, a method of contacting [e-retailer] would have been really useful, i.e. contact us via phone on ... or click here to contact us about your order." Male, 35-44, Rural location, Fashion & Homeware e-retailer

"More clear directions on how to return an item, not just how long you have to do so. More in-depth information regarding the ways by which you can return things." Female, 25-34, Urban location, Multi Category e-retailer

Consumer shopping experiences will be improved if e-retailers summarise key information at each stage in the shopping and delivery process. The regulatory requirements can be more precise as to the location and positioning of legally required information. The Statement of Principles can support this by providing e-retailers with more specific examples of best practice at each stage of the shopping process.

Extending delivery options

Whilst receipt of delivery has been improved by more flexible delivery options such as local pick up points, safe spaces and deliveries to work and neighbours, some remain disadvantaged by lack of access to these options – particularly those in rural and remote areas.

E-retailers can improve the ease of receiving online deliveries by providing a range of delivery options wherever possible. E-retailers can educate consumers at checkout by providing recommendations and guidance - for example, what they consider to be a safe place for a left parcel, promoting the benefits of convenient pick-up points and options for delivery to work or a neighbour.

Providing clarity on delivery details

Both consumers and e-retailers will benefit from greater efficiency in resolving post-order queries if e-retailers provide as standard the name of the delivery company and retailer contact details for delivery queries.

Providing clarity on refunds and call charges

Costing information around call charges, refund and returns remain a key area of consumer confusion. The lack of accessible information from e-retailers needs to be addressed. Demonstrating the potential negative impact on consumers and the long-term value of being upfront with this information, may motivate more e-retailers to provide this information upfront.

Our research demonstrates more could be done to embed regulation within the websites and consumer communications of e-retailers. A review of the regulation is needed to ensure that the requirements for e-retailers are clear and supported by specific best practice guidance.

The Statement of Principles for parcel deliveries could be extended to include more precise examples of best practice at specific stages in the online shopping and delivery journey. Some of the current recommendations from the Statement of Principles may need to be incorporated into existing regulation. This would help

ensure that e-retailers put best practices into place, building ease and confidence for online shoppers in an important marketplace.

Appendix

Appendix 1 - Regulation and best practice

E-retailers are legally required to provide clear, upfront information before an online order is placed covering the following[23]:

- The main characteristics of the goods sold; The total price including VAT

- All delivery charges and any additional costs that will be charged. Information on delivery charges should easily be found on the e-retailer site, and be clear for the consumer to understand; Any delivery restrictions (e.g. geographic); The time taken to deliver the goods

- The period within which to cancel; The conditions, time limit, and process for cancelling the order. If cancellation is not possible due to the nature of the goods, consumers must be told

- Contact details including an email address

- Arrangements for payment

- The cost of returning goods (if the consumer is required to pay)

- That goods supplied are done so in line with a consumer's rights, which if not met they have the right to complain; Complaint handling policy (if required and if one is in place); Details of any alternative dispute resolution schemes

E-retailers also need to provide consumers with the ability to accept the amount to be paid (e.g. click a 'pay now' button):

- Consumers must agree to all payments, automatic additional payments are not permitted

- Consumers are not required to pay for any costs they have not been told about before placing the order (e.g. delivery or return costs)

The consumer must be provided with a copy of the contract

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[23] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW
Business Companion - http://bit.ly/2rnbRyG

- To be provided in a format that can be kept (e.g. email, text, letter), can be personally addressed to the consumer but cannot be altered by the consumer
- Is provided within a reasonable timeframe and not later than the delivery of goods

The cancellation policy must be provided and include the following:

- The cancellation period begins on order of goods until 14 days from receipt of goods
- The consumer has 14 days from providing their intent to cancel in which to send back the goods
- Consumers do not need to give a reason as to why they wish to cancel
- The order can be cancelled if the goods arrive later than the required or the agreed delivery period (see delivery policy below)

The refund policy must be provided and meet with the following:

- Refunds must be made within 14 days of return of goods (or provision of evidence that goods have been returned)
- The refund must include the cost of the goods and the cost of delivery (if paid) at the standard delivery charge
- The e-retailer can take money off the refund for unreasonable wear and tear but not for the opening or removal of the packaging
- The e-retailer must specify before the order is placed whether the consumer will pay for the cost of any returns.
- The consumer will not pay return costs if they are not given access to this information before placing their order, or if the goods are faulty or do not meet with the description provided

Call charges for bought goods

- Where a phone line is provided for queries about goods that have been bought, the e-retailer should make a number available that is charged at no more than the basic rate

- E-retailers are not obliged to provide a phone line for post-order queries, though where both higher rate and basic rate telephone numbers are used, both should have equal presence in any communications

The delivery policy and charges must be provided and meet with the following:

- Free or standard delivery to the UK or Mainline UK cannot be offered unless provided for all postcodes
- If delivery charges information is not easy to access and clear to understand, the consumer may not have to pay
- Goods should be delivered within 30 days, unless otherwise agreed with the consumer
- The goods are the responsibility of the e-retailer until they are delivered to the consumer (unless the consumer has made their own arrangements to use a different courier in which case the goods are the responsibility of the consumer whilst being delivered)

Voluntary best practice principles for the delivery of goods purchased over the internet[24] state that e-retailers should strive to achieve the following.

Information on delivery charges, returns policy and any exemptions or additional charges should be clearly shown on home pages, on all product pages and summarised at checkout before paying:

- The cost of delivery charged does not include additional charges to certain geographic locations unless a real additional cost is incurred by the e-retailer
- E-retailers provide the widest possible delivery coverage to serve as many geographic locations as possible, only refusing to deliver based on fair and objective criteria
- Clear information on the delivery policy is provided at the earliest possible stage in the buying process (including any additional delivery charges and geographic restrictions and reasons why). Geographic restrictions should be

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[24] Statement of Principles for parcel deliveries - http://bit.ly/2skwDOW
Business Companion - http://bit.ly/2rnbRyG

made clear on the home page, in FAQs and once the consumer's postcode is known

- Clear information should be provided about delivery options before the order is completed (e.g. instructions for a safe space, signature requirements, tracking information)
- E-retailers should aim to provide consumers with relevant delivery information available at the time the order is completed and / or dispatched (e.g. how to raise a delivery issue, details of the delivery company, confirmation of dispatch, when the delivery should be expected)

E-retailers should actively try to improve the success of deliveries:

- Online retailers should work with postal delivery companies to improve the success of first-time delivery by innovating their processes to respond to the changing needs of consumers and new technologies (e.g. timed slots, local collection points, options for redelivery, options for safe spaces and leaving with neighbours)
- E-retailers should ask for feedback on the delivery service consumers experience

Appendix 2 – Screener survey

Today we want to hear your views about shopping online. Before we begin, we have a few simple questions about you to make sure we are talking to a broad profile of people across the UK.

QS1. ASK ALL, SC
Are you…?
1. Male
2. Female

QS2. ASK ALL, SC
How old are you?

1. Under 18 [CLOSE]
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55-64
7. 65+

QS3. ASK ALL, SC
In which region do you live?

1. East Anglia
2. East Midlands
3. London
4. Northern Ireland
5. North East
6. North West
7. Scotland
8. South East
9. South West
10. Wales
11. West Midlands
12. Yorkshire and Humberside
13. Other UK (e.g. Channel Islands, Isle of Man)
14. Outside the UK [CLOSE]

QS4a. ASK ALL, SC
What type of area do you live in? *Please select the area that most closely describes where you live.*
1. Large city
2. Small city
3. Large town
4. Medium town
5. Small town
6. Suburban fringe

7. Village
8. Small village/ hamlet and open countryside
9. On an island (other than England, Wales, Scotland and Northern Ireland)

QS4b. ASK THOSE WHO QS4a=3~9, SC
Do you live in a rural, remote or urban area?

1. A rural area which is remote
2. A rural area, that is not remote
3. An urban area

QS5. ASK ALL, SC

Please select the description that best represents the <u>chief income earner</u> in your household.

The chief income earner is the person in your household with the largest income and this could be you. If the chief income earner is retired or not in paid employment but has been out of work for less than 6 months, please answer for their most recent occupation.

1. Semi manual work (e.g. manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant)
2. Skilled manual worker (e.g. skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, patrolman, pub/bar worker etc.)
3. Supervisory or clerical/junior managerial/professional/administrative (e.g. Office worker, Student Doctor, Foreman with 25+ employees, salesperson, etc.)
4. Intermediate managerial/professional/administrative (e.g. newly qualified (under 3 years) doctor, solicitor, board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
5. Higher managerial/professional/administrative (e.g. established doctor, solicitor, board director in a large organisation (200+ employees, top level civil servant/public service employee)
6. Student
7. Housewife / Homemaker
8. Casual worker - not in permanent employment
9. Retired and living on state pension
10. Unemployed or not working due to long-term sickness
11. Full-time carer of other household member
12. Other

QS6. ASK ALL, SC
We are now going to ask you a few questions about shopping online for small-medium sized items.

When referring to these items we mean any physical package that is under 20kg, this could be shoes, clothes, books, small/ medium sized technology. This does not

include those larger heavier items such as furniture and white goods. Also by parcels we are not referring to any online food shops e.g. from Waitrose or Asda.

[INC. ICONS]

When will you next shop online for this type of item?

1. In the next week
2. In the next fortnight
3. In the next month
4. In the next 2 months
5. In the next 3- 6 months [CLOSE]
6. In more than 6 months [CLOSE]
7. I'm not sure at this stage
8. I rarely shop online for these types of items [CLOSE]

QS7. ASK ALL, MC, SHOW IN ALPHABETICAL ORDER
Which online retailers do you intend to shop with by the end of February 2017? Please select all that apply.

Click here for a reminder of what we mean by items.

[SHOW ICONS]

1. Aldi
2. Amazon
3. Apple
4. Argos
5. Asda
6. ASOS
7. B&Q
8. Boots
9. Carphone Warehouse
10. Currys
11. Debenhams
12. eBay
13. EE
14. Game
15. Halfords
16. Hewlett Packard
17. Homebase
18. House of Fraser
19. Ikea
20. John Lewis
21. Littlewoods
22. M&S
23. Matalan
24. New Look
25. Next
26. O2

27. PC World
28. River Island
29. Sainsbury's
30. Screwfix
31. Sports Direct
32. Tesco
33. Three
34. Very
35. Vodafone
36. Wickes
37. Wilko
38. Other, please specify [OPEN TEXT BOX]
39. None of these

S8. ASK ALL, SC

Thank you so much for your participation so far!

Would you be interested in taking part in an online shopping diary? In your diary you will record your experience of browsing, buying and the delivery of any small and medium items you buy with online retailers over the next few weeks.

This research is being conducted on behalf of Citizens Advice, who will use the information collected to make recommendations as to how the transparency and ease of online shopping can be improved. The diary information you provide will be used to provide evidence to online retailers, parcel delivery companies and the government – so by taking part you are having a say where it matters most.

You will have the opportunity to take part in up to 3 online diaries – you will receive 1,475 Maximiles points for completing one diary for one retailer or 2,950 Maximiles points for completing 3 diaries with 3 different retailers.

Would you be interested in taking part in the online shopping diary for Citizens Advice, which must be completed by the end of February.

1. Yes [CONTINUE]
2. No [CLOSE]

Thank you for agreeing to take part – great to have you on board!

We now need to collect some more information about you and how you shop online.

QS8a ASK CATI ONLY

Please provide us with the following details. These will be used only to contact you about the online diary:

First name:

Last name:

Email:

INTERVIEWER NOTE: Please double check email is correct as we will not be able to contact people without a correct email

Phone number (in case we need to contact you to check your email address):

QS9. ASK ALL, SC
How easy or difficult is it for you to receive online deliveries of small and medium items?

1. 0= Extremely difficult
2. 1
3. 2
4. 3
5. 4
6. 5
7. 6
8. 7
9. 8
10. 9
11. 10= Extremely easy

QS10. ASK ALL WHO CODE 7-11 AT QS9, MC
You mentioned that it is easy for you to receive parcel deliveries, why is this?

1. I / another person in my house can be in at home to receive deliveries
2. I have a safe space for deliveries to be left
3. I have a neighbour who is happy to take in my parcels
4. I can get any deliveries sent to my workplace
5. My home front entrance is visible and/or I have a functioning doorbell that means I am aware of any delivery arrivals
6. I can easily get to the Post Office
7. I can easily get to a Collect in Store service offered by a retailer
8. I can easily get to a parcel locker (e.g., Amazon lockers)
9. I can easily get to a shop that has parcel collection services, like a corner store with Collect+
10. Other, please specify OPEN TEXT BOX

QS11. ASK ALL WHO CODE 1-5 AT QS9, MC
You mentioned that it is difficult for you to receive parcels, why is this?

1. I often work/ am out during standard delivery times
2. I have no safe space for deliveries to be left
3. My neighbours are unable to accept my parcels
4. I can't get deliveries sent to my workplace
5. My home front entrance is not visible/ I have no doorbell so it is difficult to know when deliveries have arrived
6. I can't easily get to the Post Office

7. I can't easily get to a Collect in Store service offered by a retailer
8. I can't easily get to a parcel locker (e.g., Amazon lockers)
9. I can't easily get to a shop that has parcel collection services, like a corner store with Collect+
10. Other, please specify OPEN TEXT BOX

Now for a few final questions which are kept confidential but will help with our analysis. If you would prefer not to disclose any of this information, please select 'I'd prefer not to say'.

QS12. ASK ALL, MC
Do you have any of the following long-standing physical or mental health conditions or impairments that have lasted or are expected to last 12 months or more?

1. Blindness, deafness or other communication impairment
2. Mobility impairment, such as difficulty walking
3. Learning difficulty or disability, such as Down's syndrome
4. Mental health condition, such as depression
5. Alzheimer's disease or dementia.
6. Arthritis
7. Heart (cardiovascular) disease; coronary heart disease; angina
8. Multiple sclerosis
9. Cancer
10. Parkinson's disease
11. Asthma
12. HIV/AIDS
13. Other long-standing health condition or disability
14. Yes, but prefer not to say [EXCLUSIVE]
15. No, I don't have a long-standing health condition or disability [EXCLUSIVE]

QS13. ASK ALL, SC

What is your annual <u>household</u> income before tax?

1. Less than £10,000
2. £10,000 to £19,999
3. £20,000 to £29,999
4. £30,000 to £39,999
5. £40,000 to £49,999
6. £50,000 to £59,999
7. £60,000 to £69,999
8. £70,000 to £79,999
9. £80,000 to £89,999
10. £90,000 to £99,999
11. £100,000 or more
12. I'd rather not say
13. Don't know

QS14. ASK ALL, MC

Does your household receive any of the following forms of income support? *Please select all that apply*.

[RANDOMISE STATEMENTS]

1. Jobseeker's Allowance
2. Employment and Support Allowance (previously called Incapacity Benefit or Income Support)
3. Pension credit
4. Council tax support
5. Housing benefit
6. Universal credit
7. Income support
8. Personal Independence Payment (previously called Disability Living Allowance)
9. Attendance Allowance
10. Carer's Allowance
11. Tax credits
12. Other [SINGLE CODE, FIX]
13. I'd rather not say [SINGLE CODE, FIX]
14. My household does not receive income support [SINGLE CODE, FIX]

S15. Please tell us the first section of your postcode, as well as the first letter of the second section

This will help us to understand how location might affect online delivery services. If you would rather not give this information, please select 'I'd prefer not to say'.

E.g. FY4 2
TN11 8

I'd prefer not to say

END OF SCREENER:

IF S8= 2: CLOSE MESSAGE

We are sorry you are not able to take part in the online shopping diary but thank you for participating in the survey!

IF S8= 1: CLOSE MESSAGE

Thanks for completing the survey and again for your interest in online shopping diary. If you are selected to take part in the diary, you will be receiving an email shortly that contains further instructions.

Appendix 3 – Diary survey

Diary landing page:

Welcome to your Citizens Advice **online retailer diary**.

Your mission:
We need to hear about the **different online retailers you shop with over the next few weeks.** We are looking to find out about **the key information provided on the conditions of delivery of small and medium items.**

When referring to small and medium items we mean any physical package that is **under 20kg**. This **does not include online grocery shops or larger heavier items such as furniture and white goods**. You can of course complete a diary about a grocery retailer if you have bought non grocery items, for example clothing, DVDs, toys, small household items etc.

There are **3 stages to each diary** and you can complete them in one go or complete one stage at a time as it happens (just click on the online diary link below to continue filling out the information).

The key stages we are looking for you to record in your diary are:
- Selecting items to put in your shopping basket
- Paying for your items at checkout and confirming your order
- Delivery of your order and any questions or returns

You will need to complete all stages of the diary for a retailer by the 28th February in order to receive your [FOR ONLINE SAMPLE: points] [FOR CATI SAMPLE: payment].

Thank you and remember, by taking part you are making a huge difference to online shopping and parcel delivery.

Click 'Next' to start completing a diary for a new retailer.

You've started a diary for [INSERT RETAILER 1]. Click here to continue filling it in.
You've started a diary for [INSERT RETAILER 2]. Click here to continue filling it in.
You've started a diary for [INSERT RETAILER 3]. Click here to continue filling it in.

Step 1: Select the online retailer used for this particular purchase

ASK ALL, SC
1. **Please select the online retailer ~~on~~ which you'll use to complete your diary.**

Please note that we will not be asking about eBay [Once cap reached: and Amazon] due to use of independent sellers.

Click here for a reminder of the types of items that can be purchased in order to complete your diary.

1. Accessorize
2. Allders
3. Aldi
4. Allsports
5. Amazon [CAP AT 60]
6. Apple
7. Argos
8. Asda
9. ASOS
10. B&Q
11. Bathstore
12. Beaverbrooks
13. Benetton
14. BHS
15. Blacks Outdoor
16. Boden
17. Bon Marche
18. Boohoo
19. Boots
20. Brantano
21. Burberry
22. Burton
23. Claire's
24. Clarks
25. Comet
26. Cotswold Outdoor
27. Currys
28. Debenhams
29. Disney Store
30. Dorothy Perkins
31. Dune
32. Dunelm
33. Evans
34. Evans Cycles
35. F&F
36. Fat Face
37. Footasylum
38. French Connection
39. Game
40. GAP
41. Goldsmith
42. Go Outdoors
43. H&M

44. H. Samuel
45. Habitat
46. Halfords
47. Harrods
48. Hewlett Packard
49. Homebase
50. House of Fraser
51. Hobbs
52. Holland & Barrett
53. IKEA
54. Interflora
55. Jack Wills
56. JD Sports
57. Jigsaw
58. John Lewis
59. Joules
60. Lacoste
61. Lakeland
62. La Senza
63. Laura Ashley
64. Levi's
65. Littlewoods
66. L'Occitane
67. Londis
68. Lush
69. M&Co
70. Majestic
71. Maplin Electronics
72. Marks & Spencer
73. Matalan
74. Mexx
75. Miss Selfridge
76. Monsoon
77. Moss Bros.
78. Mr Porter
79. Net-A-Porter
80. Netto
81. New Look
82. Next
83. Office
84. PC World
85. Peacocks
86. Pets at Home
87. River Island
88. Sainsbury's
89. Schuh
90. Screwfix
91. Selfridges
92. Space NK

93. Sports Direct
94. Sunglass Hut
95. Superdrug
96. Superdry
97. Tesco
98. The Body Shop
99. The Perfume Shop
100.   Thorntons
101.   Threshers
102.   Timberland
103.   TK Maxx
104.   Topman
105.   Topshop
106.   Toys R Us
107.   Ultimo
108.   Very
109.   Waitrose
110.   Wallis
111.   Warehouse
112.   Waterstones
113.   White Stuff
114.   Whittard
115.   WH Smith
116.   Wickes
117.   Wilko.com
118.   Zara
119.   Zavvi

Step 2: Tell us about the information provided when putting your items in your shopping basket

Complete this section once you have put your items in your shopping basket but before you place your order.

ASK ALL, SC
2. **How many times have you visited the [INSERT RETAILER] website in the past 3 months to browse or buy?** *If you're unsure, your best guess will be fine.*

1. Once, this is my first time
2. Twice
3. Three times
4. Four times
5. Five times or more

ASK ALL, MC

3. Which of the following information was made available to you when placing items in your shopping basket (before placing an order)? *Please select all that apply*.

1. A detailed description of the product
2. The cost of delivery to your chosen address
3. How long it would take for your order to be delivered
4. Whether or not the item was available / in stock
5. None of the above

ASK ALL, MC

4. And which page(s) did you need to visit to find delivery and returns information on the [RETAILER] website? *Please select all that apply*.

1. FAQ / Help
2. Returns / Refunds
3. Contact Us
4. Product pages
5. Checkout
6. About us
7. Delivery information
8. Terms and Conditions
9. Other, please specify
10. Don't know / Can't say

ASK ALL, SC ON SCALE

5. Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided when <u>placing items in your shopping basket</u>?

0	1	2	3	4	5	6	7	8	9	10

Very poor   Average   Very good

ASK IF 4 OR BELOW AT Q5, OPEN WITH DON'T KNOW / CAN'T SAY OPTION

6. Why was the information provided poor? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK IF 6 OR ABOVE AT Q5, OPEN WITH DON'T KNOW / CAN'T SAY OPTION

7. Why was the information provided good? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK ALL, OPEN WITH DON'T KNOW / CAN'T SAY OPTION

8. **How could the delivery and returns information provided have been improved when <u>placing items in your shopping basket</u>? Was there anything that could have been clearer or missing information that you would have wanted included?** *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

[END OF SECTION TEXT]

You've completed ~~your diary stage on selecting items to buy~~ the 'selecting items to buy' stage of your diary. Visit your diary again when you have placed your order in order to complete the next stage of this diary.

Would you like to complete the next stage of this diary?

1. **Yes**
2. **No**

Click on your diary link again if you would like to start telling us about your shop with a different retailer (you can complete a diary on 3 different retailers).

Step 3: Tell us about placing your order at checkout

Complete this step once you've placed your order. We are interested to hear about information provided at checkout and in any confirmation communications.

ASK ALL, MC, RANDOMISE
9. **Which of the following information was made available to you <u>when placing your order at the checkout</u> with [RETAILER]?** *Please select all that apply.*

1. The cost of delivery
2. Whether delivery to your area was possible
3. Whether additional costs will be charged for deliveries to certain locations
4. How long it will take for your order to be dispatched (i.e., leave the warehouse)
5. How long it will take for your order to be delivered
6. How long you have to return the item
7. How much it will cost to return the delivery
8. The conditions around cancelling your order
9. Which company will deliver your items (e.g., Royal Mail, UPS, myHermes etc.)
10. None of the above [EXCLUSIVE]

SHOW IF CODES 1-9 AT Q9, ROTATE THROUGH EACH STATEMENT, SC
10. **Was the information provided on [INSERT STATEMENT WHERE SELECTED AT PREVIOUS QUESTION]...?**

Statements

1. Clear and easy to understand
2. Useful to you at this stage in your purchase
3. Easy to find

Scale
1. Yes
2. No
3. Don't know / Can't say

ASK ALL, MC, RANDOMISE CODES 1-3
11. **Were you able to choose any of the following when placing your order?** *Please select all that apply.*

8. The delivery company (e.g., Royal Mail, UPS, myHermes etc.)
9. The type of delivery (e.g., Standard, Next Day etc.)
10. A central location to pick up your order (e.g., Click and Collect, a locker etc.)
11. None of the above [EXCLUSIVE]

ASK ALL, SC
12. **Were there any additional charges to pay on top of the cost of standard/free delivery, excluding additional delivery charges to get Next Day/Express/Premium delivery? E.g. Extra charges for living in an area which is difficult to access?**

1. Yes, less than £5
2. Yes, between £5-£10
3. Yes, more than £10
4. No, I didn't have to pay additional charges

ASK ALL WHO CODED 1-3 AT Q12, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
13. **And why did you have to pay additional charges on top of the cost of standard/free delivery?** *Please be as specific as possible.*

ASK ALL, MC, RANDOMISE EXCEPT 11 AND 12
14. **Now, did the order confirmation contain any of the following details?** *Please select all that apply.*

1. Who to contact with any queries and how
2. Additional delivery costs, surcharging for where you live
3. How long it will take for your order to be dispatched (i.e., leave the warehouse)
4. How long it will take for your order to be delivered
5. How long you have to return the item
6. Instructions on how to return the item
7. Cost to return the item
8. How to track your order

9. The conditions around cancelling your order
10. Which company will deliver your items (e.g., Royal Mail, UPS, myHermes etc.)
11. None of the above [EXCLUSIVE]
12. I didn't receive an order confirmation [EXCLUSIVE]

ASK ALL WHO CODED 1-11 AT Q14, SC, DO NOT RANDOMISE
   15. Did your order confirmation include telephone contact details?

   1. Yes, there was a Freephone number (e.g., 01, 02, 08, 0800)
   2. Yes, there was a phone number with service charges (e.g., 084, 087, 09)
   3. Yes, there was a phone number but I don't know whether it was a Freephone number or had service charges
   4. No, there was no phone number
   5. Don't know / Can't remember

ASK ALL WHO CODED 5 AT Q1, SC
16.   Now, you said you shopped with Amazon, was this purchase…?

   1. Sold and dispatched by Amazon [SHOW IMAGE]
   2. Sold and dispatched by an independent seller [SHOW IMAGE]
   3. Sold by an independent seller and fulfilled by Amazon [SHOW IMAGE]
   4. Don't know / Can't remember

ASK ALL, SC ON SCALE
17.   Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided <u>when placing your order at the checkout</u>?

0	1	2	3	4	5	6	7	8	9	10

Very poor   Average   Very good

ASK IF 4 OR BELOW AT Q17, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
   18. Why was the information provided poor? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK IF 6 OR ABOVE AT Q17, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
   19. Why was the information provided good? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK ALL, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
   20. How could the delivery and returns information provided have been improved <u>when placing your order at the checkout</u>? Was there anything

that could have been clearer or missing information that you would have wanted included? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

[END OF SECTION TEXT]

You've completed the 'placing your order' stage of your diary. Visit your diary again when you have received your delivery in order to complete the next stage of this diary. If however, your delivery is late you can still go on to complete this next section.

Would you like to complete the next stage of this diary?

    1. **Yes**
    2. **No**

Click on your diary link again if you would like to start telling us about your shop with a different retailer (you can complete a diary on 3 different retailers).

Step 4: Delivery of your order and dealing with any returns or queries

Complete this section once your order has been delivered (of if your order is late being delivered). Tell us about the experience of waiting for the delivery and whether there are any further queries to be dealt with.

ASK ALL, MC RANDOMISE EXCEPT 6
21. When waiting for your delivery from [ENTER RETAILER], which of the following did you receive (by email, by text, or by post)?

    1. Confirmation that the order had been dispatched (i.e., left the warehouse)
    2. When the order was due to be delivered
    3. How to track your order
    4. The conditions around cancelling your order
    5. Information on how to re-arrange delivery
    6. None of the above [EXCLUSIVE]

SHOW IF CODES 1-5 AT Q20, ROTATE THROUGH EACH STATEMENT, SC
22. Was the information received on '[INSERT STATEMENT WHERE SELECTED AT PREVIOUS QUESTION]'…?

Statements

    1. Clear and easy to understand
    2. Useful to you at this stage in your purchase
    3. Easy to find

Scale
    4. Yes
    5. No

6. Don't know / Can't say

ASK ALL, SC
23. Were you told <u>who</u> to contact if you had questions or issues with your delivery or the items received?

1. Yes - the retailer
2. Yes - the delivery company
3. No – it was not made clear
4. Don't know / Can't remember

ASK ALL, SC, RANDOMISE EXCEPT 13-14
24. Which company delivered/ will deliver your items?

1. Royal Mail
2. UPS
3. DPD
4. Hermes
5. TNT
6. DHL
7. UKMail
8. Amazon
9. Yodel
10. FedEx
11. Whistl
12. Parcelforce
13. Other, please specify
14. Don't know / Can't remember

ASK ALL, SC
25. Was the parcel delivered within the delivery window specified in your order confirmation?

1. Yes, it arrived on time
2. No, it was 1-2 days late
3. No, it was 3-4 days late
4. No, it was around a week late
5. No, it was around two weeks or more late
6. I have not yet received my order
7. I didn't receive an order confirmation

SHOW IF CODES 1 – 5 AT Q25, MC, RANDOMISE
26. Having received your delivery, have you been provided with information ~~about~~ regarding…?

1. How to return your item
2. How to get in touch with any queries or complaints
3. What will be refunded to you if you return your item

4. The confirmation of your delivery
5. Where the order had been delivered to (e.g., safe place)
6. None of the above [EXCLUSIVE]

SHOW IF CODES 1-5 AT Q26, ROTATE THROUGH EACH STATEMENT, SC
27. Was the information received on '[INSERT STATEMENT WHERE SELECTED AT PREVIOUS QUESTION]'…?

Statements

1. Clear and easy to understand
2. Useful to you at this stage in your purchase
3. Easy to find

Scale
1. Yes
2. No
3. Don't know / Can't say

ASK ALL, SC ON SCALE
28. Overall, how would you rate [INSERT RETAILER CHOSEN] for the delivery and returns information provided <u>while waiting for delivery</u>?

0   1   2   3   4   5   6   7   8   9   10

Very poor   Average   Very good

ASK IF 4 OR BELOW AT Q28, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
29. Why was the information provided poor? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK IF 6 OR ABOVE AT Q28, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
30. Why was the information provided good? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK ALL, OPEN WITH DON'T KNOW / CAN'T SAY OPTION
31. How could the delivery and returns information provided <u>while waiting for delivery</u> have been improved? Was there anything that could have been clearer or missing information that you would have wanted included? *Please be as descriptive as possible.*

You can upload a photo or screenshot to provide an example. [given simple instructions]

ASK ALL, SC, DO NOT RANDOMISE

32. Finally, if you were to purchase another item from [INSERT RETAILER] and paid £5.00 for Next Day delivery instead of £2.50 for standard delivery, what would you expect to be refunded to you if you were to return your order? *Please answer assuming that returning the item is <u>free of charge</u>.*

1. <u>Nothing else</u> besides the cost of the product
2. The cost of the product <u>plus the £2.50 I would've been charged for standard delivery</u>
3. The cost of the product <u>plus the £5.00 I paid for Next Day delivery</u>
4. Don't know / Can't say

CLOSE AND END MESSAGE

[END OF RETAILER DIARY: SHOW ONCE COMPLETED RETAILERS 1 AND 2 IN FULL]

Thank you for your time – you have completed your diary for this online retailer.

You can complete the diary again by clicking on your diary link. Remember that you can complete a diary for up to 3 retailers.

Your time is hugely appreciated and your responses will be used by Citizens Advice to advise on changes that can be made to make sure you have correct and clear information when shopping online.

ADD LIST SAMPLE ONLY - [END OF RETAILER DIARY: SHOW ONCE COMPLETED 3ʳᵈ RETAILER IN FULL]

A huge thank you – you have finished all 3 online retailers' diaries. You've now completed your task.

We are busy reviewing all the information collected (all your answers are anonymised and treated in strict confidence) and speaking with Citizens Advice about the findings.

We will contact you in March to confirm details of your payment.

Thank you again.

Appendix 4 – Retailer audit scoring criteria

The 25 audited retailers were given an overall score from 0 to 10 based on their performance in the audit on our 3 key criteria – presence of regulated and best practice information, clarity and ease of finding.

Score	Explanation
10	The majority of regulations present, all easy to find and clear
8	Most regulations present, easy to find and relatively clear
6	More than half of the regulations present, some easy to find, some lacking
4	Some regulations present, difficult to navigate (e.g. in T&Cs), regulations not written in lay terms
2	Only a few regulations present, difficult to navigate (e.g. in T&Cs), regulations poorly explained
0	Little to no regulations present on the retailers site, no explanations

Appendix 5 – Diary sample profile

Gender		Age			Area	
Male	Female	Under 35	35-54	55+	Urban	Rural & Remote
46%	54%	33%	46%	21%	69%	31%

Social Grade		Income			Disability	
ABC1	C2DE	Under £19k	£20k-£49k	Over £50k	Yes	No
64%	36%	24%	49%	18%	29%	71%

Appendix 6 – E-retailers' diaries completed

E-retailer	Number of diaries	E-retailer	Number of diaries
Argos	115	Evans	3
Asda	77	Game	3
Tesco	75	GAP	3
Marks & Spencer	49	Go Outdoors	3
Amazon	48	Homebase	3
Sainsbury's	35	Interflora	3
Boots	34	Lush	3
Debenhams	33	M&Co	3
Aldi	28	PC World	3
Next	28	Peacocks	3
Currys	23	The Perfume Shop	3
John Lewis	22	Topman	3
Wilko.com	20	Zavvi	3
ASOS	19	Allsports	2
Sports Direct	18	Boden	2
Apple	17	Evans Cycles	2
New Look	16	Fat Face	2
B&Q	14	Habitat	2
Very	13	Halfords	2
H&M	11	Maplin Electronics	2
Screwfix	11	Pets at Home	2
Superdrug	11	WHSmith	2
House of Fraser	10	Allders	1
TK Maxx	10	Bathstore	1
Clarks	9	Beaverbrooks	1
Dorothy Perkins	9	Benetton	1

Dunelm	9	BHS	1
Zara	9	Blacks Outdoor	1
Matalan	8	Brantano	1
Waitrose	8	Burberry	1
F&F	7	Footasylum	1
Littlewoods	7	H.Samuel	1
Accessorize	6	Joules	1
Boohoo	6	Lacoste	1
Holland & Barrett	6	Laura Ashley	1
IKEA	6	L'Occitane	1
River Island	6	Majestic	1
The Body Shop	6	Miss Selfridge	1
Toys R Us	6	Monsoon	1
Wickes	6	Net-A-Porter	1
Bon Marche	5	Office	1
JD Sports	5	Schuh	1
Topshop	5	Selfridges	1
Waterstones	5	Space NK	1
Lakeland	4	Superdry	1
White Stuff	4	Timberland	1
Burton	3	Warehouse	1
Disney Store	3		