The IMRG – Blackbay UK Consumer Home Delivery Review 2016 is a study of online fulfilment requirements. As well as exploring customer satisfaction, this document anticipates UK consumers’ expectations and needs.
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1. Introduction

Welcome to the IMRG UK Consumer Home Delivery Review 2016, the eighth in the series, which is once again supported by Blackbay, the mobility solutions provider whose consistent involvement in this survey has again allowed us to expand the scope of our work.

“Blackbay is committed to our ongoing support for the Consumer Home Delivery Review. The delivery market is in a constant cycle of change with consumer demands increasing and the desire for transparent, consistent and fast delivery expected as the new standard of delivery.”

Over recent years we have been careful to maintain the same structure to the survey so that we can develop trend data and we can now offer a view over a period up to eight years for some measures, to show how consumer perceptions and behaviours have changed and how expectations and future needs for online delivery are evolving.

However, to keep the survey current and relevant we make minor changes to a few questions and add a small number of new ones each year to ensure that we capture consumer opinion of more recent developments. Where appropriate, we have noted any significant changes in methodology and context and the trend tables and graphs also show how long each question has been included.

Each section of the report picks up a particular theme and identifies the contributing survey questions; which have been designed to provide different perspectives on the same area to help produce the most robust analysis. The full survey results and supporting charts can be found in annex 1 but in each section we have identified the specific questions that cross-refer to produce our analysis and to help readers navigate the report.

We have also sought to incorporate appropriate parallel research from other independent sources where this covers the same area as our own data in order to provide ever deeper and more objective insight.

Taking this approach, we believe we have created the most neutral and complete insight of UK consumers’ views in the area of e-retail delivery. Details of the additional data sources are individually referenced in the main commentary and in footnotes.

We are pleased to report that this year the survey base from which we have obtained our results is consistent with last years’ survey with over 1280 adult consumers represented. (Question 1).

We are once again grateful for the support of eDigitalResearch (edr), part of MARU Group whose expertise provided the means by which we were able to reach out to UK consumers and capture the results reported here.
2. Executive summary

The IMRG – Blackbay UK Consumer Home Delivery Review 2016 presents an eight-year 'deep-dive' view of the developing expectations and perceptions of UK shoppers and tracks what is overall a very positive story during that period. However, as the industry meets one consumer challenge, expectations and situations change to present others so this is an evolving landscape.

The key findings of this years’ survey are summarised below.

Overall UK shoppers are relatively satisfied with the quality of e-retail delivery and it is consistently becoming less of a barrier to shopping online. It would seem that most shoppers are confident that both UK and non-UK retailers will provide a good delivery service supported by the fact that the considerable majority of orders always arrive when expected.

However, there is no room to be complacent because, as services and delivery offers improve, so too customer’s expectations increase. The two main ongoing concerns remain:

• The additional cost of delivery, often only discovered at check-out, causing basket abandonment
• The inconvenience of not being home when the delivery comes and the frustration of not being able to anticipate delivery within a certain time frame

Clearly, if additional cost is a concern then shoppers will be reluctant to pay a premium for enhanced delivery services and this years’ survey confirms this to be the case. For any service enhancement, the maximum that most would be prepared to consider is £2 but in many cases the expectation is that there will be no additional cost to the consumer.

This presents a challenge because delivery to home is still the preferred option for the majority of shoppers but we are seeing a perceptible change with alternative delivery locations being more frequently considered. Awareness of and developments in specific neighbour delivery, safe-place delivery and click & collection solutions are filtering through to consumers and an increasing proportion of our respondents have used and will use them. Retailers wishing to provide a good delivery experience should therefore look at providing a good range of delivery options over and above simply the speed of delivery.

However, the most important requirement for shoppers when it comes to making their online delivery experience more convenient is to be kept informed. This starts with providing good delivery information during the browsing stage of the shopping experience. Shoppers don’t want to look too hard to find out when they will be able to get delivery, how much it might cost and if there are any exceptions. This information should certainly be signposted from the home page and ideally every product page because leaving it to check-out can easily lose the sale.

Once in transit shoppers want to be kept up to date and the two most important times for this are the day before delivery is due and the morning of delivery, confirming the expected time window. This is highly appreciated even if the carrier does not give the option to defer delivery to another day or divert to another location, although when this can be done so much the better.
With the rise in alternative delivery and safe-place delivery another information need has started to emerge with almost every survey respondent confirming that they would like the carrier to be able to confirm that their delivery instructions have been followed.

The majority of customers confirm that they would like to sign for their orders but as this is not always possible, delivery compliance, perhaps supported by image capture, will become increasingly important as consumers embrace ‘recipient not present’ solutions going forward.

So it appears that the UK’s e-retail industry has the ability to keep pace with the developing expectations of UK shoppers. Most of the solutions required to meet these needs already exist and retailers need simply to deploy them...... except in one area.

Where we do see a worrying gap developing is in the area of returns.

UK shoppers confirm for outbound deliveries:

- That 68% believe a good delivery experience would encourage them to shop again with a given retailer
- That 84% are satisfied with the delivery services they receive

HOWEVER

For returns, UK shoppers tell us:

- That 74% consider a good returns service important when selecting the retailers, they will shop with
- Only 61% are satisfied with the returns service they receive

The ability to drop off the return or have it collected are important and the solutions to enable this are in place. However, the main thing customers want is again, information. Access to real-time tracking, updates on the status of their return and confirmation of return are all required to keep customers happy and loyal.

The IMRG Blackbay UK Consumer Home Delivery Review 2016 confirms that we are moving in the right direction to keep up with the ever changing needs of UK shoppers, but also that we can never slow the pace of innovation and deployment.
**Blackbay observes**

Over the past eight years we have seen the market continue to make improvements in delivering to meet evolving consumer expectation. However, despite these improvements, the message is still clear – consumers want predictability, in both delivery and in communication throughout the entire delivery journey.

There is an ever increasing requirement to provide information and transparency of processes throughout the physical supply chain to allow consumers to accurately anticipate delivery. Moving items without information increases risk, adds complexity, raises costs and ultimately detracts from the overall customer experience.

Whilst many organisations have improved when communicating information to their customers, this is yet to be achieved as an industry standard.

Retailers and delivery companies with a commitment to customer experience are enabling consumers to provide helpful delivery instructions, track a delivery, change a delivery time or location up until the final minutes of delivery, deliver during a specific time slot, deliver to a safe place/neighbour and provide assurance that the delivery has been made as required.

They are treating the customer as an individual, not an address by allowing the customer to specify their delivery preferences as relates to their needs on an order by order basis, without suggesting that information is a premium service offering.

This market continues to evolve, and with the arrival of new delivery players, traditional last mile delivery methods and expectations will continue to be challenged by the consumer. However, all of this requires investment but although the consumer is not currently prepared to pay significantly more for delivery, accurate and efficient first time delivery drives out cost and drives in revenue to create the necessary return on that investment.

That said, in other geographic markets where Blackbay operates, we have seen an acceptance of paying more for delivery when the delivery experience is high and also that more consumers are prepared to pay as awareness increases.

Only once delivery transparency and delivery interaction is enabled to a consistent and reliable standard in the UK, that meets the ever increasing expectation of consumer will we see the levels of efficiency and customer satisfaction that will lead to a sustainable delivery environment and where there is a greater acceptance by consumers to pay for additional delivery services.
3. Overall perception and satisfaction

The analysis in this section is supported by questions relating to UK Delivery - 2, 3, 4, 4-1, 5, 6, 8, 13 and 14. The specific data and supporting charts are provided in annex 1.

We always start the survey by establishing whether shoppers are prepared to ‘trust’ online to get their goods when and where they want them or have more faith in the physical shopping trip. Over the life of the survey we have seen ‘delivery’ as a barrier to online shopping undergo a steady decline and this year the trend continues.

This reinforces the belief that online delivery service performance and delivery solution enhancements continue to drive improved consumer confidence.

Traditionally the two main reasons for shoppers not using online for a particular purchase are the additional cost of delivery and the risk that they may miss the delivery but not being at home, so incurring additional inconvenience and cost. Both things they might avoid by simply going to the shop in the first place.
This year’s survey confirms these two barriers as the most significant but when we add the third barrier, that delivery time windows are not specific enough, we see that the ability to anticipate delivery and receive the order first time / on time, is overall more important.

However, once the shopper has decided to go online, the thing that can stop them completing the purchase is clearly a higher than expected / acceptable cost for delivery. Of the 48% of respondents who have abandoned a basket for reasons related to delivery, 70% have done so for this reason.

When the retailer gets the choice of delivery services and price points right it certainly pays.

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1 This is consistent with the findings of the Hermes Parcel Deliveries 2015 Usage and Attitudes Survey which gives ‘high delivery charges’ as the number one reason for basket abandonment.
The survey shows that 68% of shoppers saying that a good delivery experience; of which choice and price are part, will encourage them to shop again with a retailer. However, the fact that this measure is showing a downward trend suggests that shoppers are generally confident that most retailers will provide a good service. This view is supported by an improving 84% satisfaction level for outbound delivery and an 85% view that orders are generally delivered on time / first time.

When shoppers’ delivery expectations are not met however, it is once again ‘not at home’ and ‘had to collect’ that sit far above all other reasons for dissatisfaction which goes to prove that creating solutions that create a delivery coincidence for the shopper, parcel and delivery agent remains a high priority for solutions providers and retailers in order to keep up with customer expectations and create an ever improving shopper experience.

<table>
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<th>2015/16</th>
<th>2014/15</th>
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</thead>
<tbody>
<tr>
<td>All my online orders have been delivered as I expected</td>
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<td></td>
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<tr>
<td>Other (please specify)</td>
<td></td>
<td></td>
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<tr>
<td>Item was broken</td>
<td></td>
<td></td>
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<tr>
<td>Delivery failed completely</td>
<td></td>
<td></td>
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<tr>
<td>Address inaccurate / redirected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parcel delivered to the Post office / depot and had to be collected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online tracking and actual delivery don’t match</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(delivery did not arrive when advised to expect)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery didn’t arrive as advised at time of order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No one at home to receive / Signature required / could not be left</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No one is home to receive / item would not fit through the letter box</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 This experience begins even before purchase. The MetaPack Delivering Consumer Choice Report 2015 advises that 66% of its respondents (all geographic markets) have chosen one retailer over another because they provided more delivery options.

3 The eDigitalResearch and IMRG Customer Behaviour Report – 2015 confirms that 66% of UK consumers feel that delivery and returns policies will affect who they shop with online.
4. Shopper motivation and behaviour

The analysis in this section is supported by questions:

- Black Friday - 7, 7.1 and 7.2
- Cost - 17.4, 28, 30, 30.1 and 30.2
- Convenience – 29 and see sections 7 and 9
- Speed – see section 10

The specific data and supporting charts are provided in annex 1

Black Friday

This year, for the first time we asked how shoppers were influenced by retailer promotions over the Black Friday period.

Perhaps conditioned by the experience of Black Friday 2014, two-thirds of our respondents say that they did not buy online specifically as a result of retailers’ promotions over the same period in 2015.

Those that did were also prepared to wait a little longer for their orders rather than pay a premium.

Price

Taking further the theme of pricing of delivery services, the survey continues to show that additional premiums can be a barrier.

Not only do high delivery prices cause basket abandonment and dissuade shoppers from upgrading to faster services during peak promotion time, we will also see that shoppers:

- Are generally not prepared to pay to receive pre-delivery information
- Are reluctant to pay more than £1 for a click & collect service
- Will rarely pay more than £2 extra for a time-slot delivery service
- Despite being in favour of environmentally friendly delivery solutions, would be unlikely to pay much extra to use them. Perhaps £20 per year?

These pricing behaviours are covered in context in the sections that follow

Speed and convenience

The need for speed and convenience and how these drive shopper behaviour are covered fully and in context in sections 7, 9 and 10.
5. Delivery destination and location

The analysis in this section is supported by questions 10, 11, 12, 12.1, 12.2, 12.3 and 20. The specific data and supporting charts are provided in annex 1.

Consistent with all previous years, Home remains the preferred delivery destination for all shoppers but looking deeper into the data we see some subtle yet interesting trends developing. The chart below helps to illustrate.

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4 The IPC Online Shopper Survey – January 2016 reports that on average, across 17 geographic markets (including UK) home delivery is the preference for 75% of consumers
This shows us a slight decline in the ‘Home’ preference over the past 4 years\(^5\) offset against perceptible increases in the preference for:

- Click & collect from the retailer’s store – purple line – now 23%
- Delivery to a friend / relative / neighbour – red line – now 16.5%
- Third party click & collect - alternative delivery location – green line – now 14%

Over the past 4 years these service options have become more widely available and so more familiar to and increasingly conveniently located for shoppers.

The rise in ‘neighbour’ delivery is also as a result of shoppers being able to specify more, which neighbour will take in orders on their behalf. Two-thirds of or respondents said they would prefer to specify exactly where the order was to be left rather than leave it to the delivery agents discretion.

The increased popularity of neighbour delivery is further evidenced by the comparison below which also shows that this option is up on last year and that 80% would be happy for a neighbour to sign for goods on their behalf\(^6\).

![Preferred safe-place location](image)

However, neighbour, safe-place or alternative location delivery should not be seen as an easy option for delivery companies because almost unanimously, shoppers expect the delivery company to be able to prove that they have followed the instructions provided.

\(^5\) The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports a similar trend year-on-year:
- Delivery to home (signed for) – down 4%
- Delivery to home (not signed for) - down 7%
- Neighbour – no change
- Click & collect from retailers store – up 90%
- Third party click & collect – parcel shop (up 120%), locker (up 66%) although these options start from a very low base

\(^6\) The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports ‘parcel left with neighbour’ as the preferred alternative delivery option if not home when delivery arrives – 39% of respondents
6. Delivery performance

The analysis in this section is supported by questions 13, 14, 15 and 16. The specific data and supporting charts are provided in annex 1.

As previously explained, in excess of 85% of survey respondents believe that their online orders are typically delivery at the first attempt and within the promised delivery timescale and this has been consistently so for the past three years.

The underlying reason for this consistent level of satisfaction can be demonstrated by looking at the actual on time delivery performance of the UK’s carriers over this period.

Source: IMRG – MetaPack Delivery Index March 2016

With the exception of December 2014, when Black Friday sales disrupted the UK logistics supply chain, the industry has maintained a high standard in this respect.

The main perceived reasons for a failed delivery are, as indicated before - ‘no-one at home’:

- The item was too big to leave / fit through the letterbox / could not be left (no safe place) – 50%
- Signature required – 46%

7 The most recent Hermes Parcel Deliveries Usage and Attitudes Survey (2015) confirms that 72% of its UK respondents would strongly agree that the delivery services used by retailers, are improving
However, the improvements in safe-place / alternative delivery options and the increasing use of pre-delivery alerts – allowing the customer to anticipate the delivery day and time window and often providing the option to defer or divert delivery – has led to an improvement on the level of failed or ‘carded’ delivery attempts too.

Source: IMRG MetaPack UK Delivery Index March 2016

In many cases a failed delivery of this type can be rearranged but when the customer has to collect the parcel the perceived roundtrip is consistent at an average of 3.8 miles and the time taken equally consistent, averaging just over half an hour.

Reducing this time and distance is important of course and when asked ‘What would make receiving online orders more convenient?’ – ‘Being able to select delivery to a 3rd Party Click and Collect location instead of a carrier depot if not at home when the delivery is first attempted’ was considered important or very important by 52% of respondents and ranked 10 out of 17 options provided.
7. Future improvements

The analysis in this section is supported by questions 29, 29.1, 31 and 42. The specific data and supporting charts are provided in annex 1.

Recognising that e-retail delivery can never meet the expectations of all shoppers all of the time, we always seek to understand what improvements consumers would like to see, in order to make their shopping experience more convenient and the solutions they value the most.

With eight years’ data in some cases we can also track the change in perception and use of different solutions.

Clearly the services selected by the majority of respondents as being important or very important, are likely to have the most impact and here we consistently see the same seven options producing two clear themes:

1. The ability to specify
2. Information

The chart below illustrates the trend for options contributing to these themes over the life of the survey, showing those that score as ‘important’ or ‘very important’ with greater than 60% of respondents.
To these themes we should now add the use of alternative delivery locations because:

- They are also a means of specifying an exact location and time for receiving a parcel
- They provide clear time and place delivery information
- They are all increasing in popularity

**Alternative Delivery Options**

- Delivery to a ‘safeplace’ I specify when ordering (shed / garage, secure box, neighbour, etc)
- Being able to select delivery to a 3rd Party Click and Collect location instead of a carrier depot if I am not at home when the delivery is first attempted?
- Being able to select a 3rd Party Click and Collect location (staffed location or locker location) as your delivery address at time of order [Previously 1st option was PUDO and 2nd was Locker]
- Being able to select In Store ‘Click and Collect’ (delivery to the retailers local store for you to collect) at time of order
On the other hand, some more traditional specified delivery options are less in demand. Specifically, those requiring a premium delivery charge and a decision made at the point of order, when the delivery should be made.
Looking to the future it seems that UK consumers have yet to be convinced by some embryonic delivery solutions\(^8\) & \(^9\).

The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports the appeal of new delivery innovations for UK shoppers as:

- Drones – 18% would be prepared to see drones make deliveries to remote areas
- Car boot – 8% would be prepared to have delivery to their car with access allowed through a security code

The MetaPack Delivering Consumer Choice Report 2015 reports the appeal of new delivery innovations for shoppers in all of the geographic markets it covered as:

- Delivery by drone – 16%
- Pick up at train station – 16%
- Delivery to car boot – 11%

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\(^8\) The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports the appeal of new delivery innovations for UK shoppers as:

\(^9\) The MetaPack Delivering Consumer Choice Report 2015 reports the appeal of new delivery innovations for shoppers in all of the geographic markets it covered as:
8. Delivery information

The analysis in this section is supported by questions 3, 9, 12.3, 17, 17.1, 17.2, 17.3, 17.4, 29 and 33. The specific data and supporting charts are provided in annex 1.

In this section we examine the importance customers place on good delivery and returns information both before they order and during the delivery and returns phases.

Pre-order information

Generally, the inability to find appropriate delivery information acts as a barrier to online shopping for a relatively small and declining proportion of our survey base when compared to other issues.

The chart above suggests that retailers are improving when it comes to promoting this information in the right place and at the right time. With returns information it is harder to say whether the trend is in the right downward direction because we do not have as much historic data but it would be surprising if retailers were not displaying this information in similar ways?

A positive downward trend for this measure is crucial because when asked ‘What would make receiving online orders more convenient?’, survey respondents rate ‘clear delivery information prior’ to ordering as important or very important and priority 3 out of 17 options offered10. In addition, a third look for delivery and returns information even before they start to browse a web site and another third will do before they confirm their order11.

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10 The MetaPack Delivering Consumer Choice Report 2015 confirms that 79% of its UK respondents would like to see delivery options displayed on the product page.

11 The MetaPack Delivering Consumer Choice Report 2015 reports that as much as 76% across all age demographics and geographic markets look at the retailers returns policy before they complete their order.
Pre-delivery information

Once the order has been placed, unsurprisingly a consistently high proportion of shoppers value being kept informed about the progress of its delivery.

However, perhaps the most important thing to note is that shoppers consider all of the information options we suggested as important or very important.

As the chart below shows, this view is consistently held over the past few years.

This is confirmed by our question ‘What would make receiving online orders more convenient?’, with ‘access to online tracking’ and ‘an ‘in transit’ SMS or e-mail to advise when delivery can be expected’ ranking priority 1 (of 17) and 2 (of 17) respectively in terms of being important or very important.
A pre-delivery alert still ranks as number 2 even without the ability to interact with the carrier and be able to defer (to another day) or divert (to another place). However, this defer / divert option on its own ranks 6 (of 17).

Receipt of the alert by email or SMS are equally acceptable and with 86% of our sample accessing emails via their smartphones, virtually ubiquitous as both can support the interactive functions to defer / divert\(^\text{12}\).

What is interesting however, is the timing of such messages with most valued being ‘the day before delivery – no time specified’ (55%) and ‘on the morning of delivery – time window specified’ (62%). An update within an hour of delivery was, in comparison seen as important or very important by only 25% of our respondents\(^\text{13}\).

Despite the importance to the customer of such a facility, we should not rely on being to recover any cost from the customer with almost 50% refusing to consider even a small (10p) charge.

\(^{12}\) One challenge for retailers and carriers wishing to provide this facility is the capture of accurate contact details. Some shoppers will still not provide an accurate or regularly used email or mobile phone number because of concerns about sharing personal data. An estimated 38% of online consumers claim that nothing could incentivise them to share personal information - Informatica’s ‘The State of the Data Nation’ research – January 2016

\(^{13}\) This approximate priority ranking is confirmed by the 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports where UK shoppers score, as important, real time information about the progress of delivery (83%) above pre-advice within 1 to 2 hours of delivery (SMS – 79% and email 71%)
9. Alternative delivery point / click and collect solutions

The analysis in this section is supported by questions 11, 12.1, 12.2, 12.3, 20, 22, 22.1, 23, 24, 25, 26, 27, 28, 29 and 29.1. The specific data and supporting charts are provided in Annex 1.

Additional information about click & collect can be found in the IMRG Collect+ UK Click & Collect Review.

With 55% of our responding households reporting that there will not or may not be someone at home to accept a delivery and with more than 80% declaring home as their preferred delivery location, there is often a need for contingency.

When it comes to identifying the options available 53% do not have a safe-place adjacent to their home or a trusted neighbour to rely on. Of those that do, the majority do use a neighbour (40%), a shed (23%) or a porch (20%) and two-thirds of our responding households would prefer to be able to specify exactly their safe-place rather than leave it to the delivery agent’s discretion.

The issue of ‘delivery compliance’ is becoming increasingly high profile and it only takes one error to tarnish the retailer / customer relationship or the carrier brand. A staggering 95% of our respondents confirm that they would like the delivery company to be able to confirm / demonstrate that they have followed the safe-place instructions provided. Fortunately, solutions now exist to enable retailers to have a high level of control in this area.

When delivery to home or a safe-place adjacent to home is not an option, our respondents report that they use a range of solutions. The chart below shows the normal delivery location, excluding home or home adjacent safe-place over the life of our survey and most are showing an upward trend.
The exception is Work with the increased concerns about security and facilities management causing many employers to frown on this practice, so limiting its growth as an alternative delivery location.

In its place are the ‘in store’ and ‘third party’ click & collect solutions which 67% of our respondents have said they have had occasion to use and a further 8% intend to do so in the future. \textsuperscript{14,15} Of those who already have:

- 91% have used the ‘in store’ version, collecting from retailers nearest outlet
- 35% have collected from a convenience store, petrol station etc

Breaking this down further we can see that although the retailers store is clearly the number 1 choice, all other options have a part to play.

If you could opt for an alternative delivery address / location where would you be likely to choose?

- Local newsagent
- Petrol station
- Convenience store
- Secure locker box near to a regular route you travel
- The retailers store (Click & Collect)
- Other

\textsuperscript{14} This is consistent with the 2015 Hermes Parcel Deliveries Usage and Attitudes Survey – UK shoppers:

- Aware and used – 64%
- Aware and likely to use – 16%

\textsuperscript{15} This is consistent with the MetaPack Delivering Consumer Choice Report 2015 which reports that 74% of its UK respondents have used click collect in some form
The motivation for using the ‘in store’ option and the reasons it is most popular are revealed below.

Consistently we can see that ‘in store’ click & collect is used, not because of not being able to receive delivery at home but because of the other main barrier to online shopping – the additional cost of home delivery.

Shoppers recognise that the cost of their order is the product and delivery combined and that, when a delivery charge is to be applied, avoiding this charge is the same as receiving discount. As a result, shoppers (now taking the extra time and effort to collect their order), will not refund this discount by way of a click & collect premium.

40% of respondents would not pay any click & collect premium at all and although 60% of respondents might pay up to £1 extra for a no-hassle collection, as soon as this becomes £2 the figure drops to 34%.

We can also see that this collection ideally has to be combined with other high street activity – trip chaining. Clearly shoppers recognise that the most convenient way of receiving an online order is having it delivered to their home but when they do make the cost motivated decision to collect, the collection location has to be in keeping with their routine.
This applies to 'third party' click & collect as well with most regular users of these services always using the same place.

Most (65%) prefer a staffed location although a third have no real preference as long as it is conveniently located and open when they pass by.

We are able to convert 'conveniently located' into round trip distance with 76% of respondents thinking it is acceptable to travel up to 2 miles but a quarter would not go more than a mile out of their way.

Overall click & collect options, as a means of making the whole delivery experience more convenient rank:
- In store – 8 out of 17 options provided
- Third-party – 14 out of 17 options provided
10. Premium services

The analysis in this section is supported by questions 17.4, 28, 30, 30.1, 30.2, 48.1 and 48.2. The specific data and supporting charts are provided in annex 1.

In the context of this survey, premium services are those which the customer can choose at checkout and which allows them to specify the delivery service they require for a particular order. Typically, this will be a nominated day or timed service and could include assured next day or same day delivery. We have covered click & collect and shoppers’ attitudes to it as a premium service in the previous section.

Of course sometimes retailers will offer next day delivery as a standard service, perhaps at no additional cost (as a marketing and conversion tool), but our focus here is where the customer requires a specific service and where there is the likelihood that a premium will be asked for.

First of all, we asked our survey group how they would rank certain delivery options without reference to any additional charges. *What would make [be important or very important] receiving online orders more convenient?* As regards to services we might consider ‘premium’ our 2016 results are, in priority order:

- Being able to choose a specific delivery day – ranked 4 out of 17 options provided
- Being able to choose a specific delivery time slot - ranked 5 out of 17 options provided
- Being able to choose an evening delivery option - ranked 9 out of 17 options provided
- Being able to choose a Saturday morning delivery option - ranked 12 out of 17 options provided
- Being able to choose a same day delivery within a given time limit - ranked 15 out of 17 options provided
- Being able to choose a Sunday delivery option - ranked 16 out of 17 options provided

This ranking may provide retailers a useful guide when prioritising the additional service options they wish to offer to their customers?

In support of this we can also provide some indication of use with the following chart.

For some of these options, how often have you used the following? (Often or Always)

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<thead>
<tr>
<th>Service</th>
<th>2015/16</th>
<th>2014/15</th>
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<tbody>
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<tr>
<td>Evening Delivery selected at the time or order</td>
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<td>Weekend Delivery selected at the time or order</td>
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</tr>
<tr>
<td>Same Day Delivery selected at the time or order</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In addition, we can reference the actual use of premium services from the IMRG MetaPack UK Delivery Index.

The chart shows the proportion of UK delivery volume sent by premium services for February 2016. This allocation does not change significantly through the year other than in December where there is an increase in the use of Next Day services as the Christmas deadline approaches.

This allocation may show less use for time slot, weekend, same day and evening services than the previous chart and rankings suggest but we now need to take account of the impact of premium charges.

In this respect our research shows that there is a clear tipping point above which UK shoppers are unwilling to go.

Using time slot delivery as an example, there is a significant fall in apparent demand as soon as the shopper is asked to pay more than a £2 premium.

In terms of what shoppers think is an acceptable timeslot, two-thirds of respondents would accept 2 hours but for three hours the acceptance level drops to 16% suggesting that even if a customer is prepared to pay the £2 figure, it must be in return for a 2-hour delivery window.
11. Signature on delivery

The analysis in this section is supported by questions 18, 19, 20 and 21. The specific data and supporting charts are provided in annex 1.

One reason for using a premium service might be to ensure that someone is home to sign for the goods on arrival and it is clear that most shoppers expect to sign for their orders at least some of the time with only 8.3% saying that they would be generally happy for even valuable goods to be left without signature.

However, a proxy signature from a neighbour is acceptable for 70% and a PIN-based confirmation of delivery would suit 63%.

The tipping point above which a significant majority of consumers would want a signature or some other proof of delivery is £30 where 54% have this expectation, rising to 83% at £50.
12. Mobile devices

The analysis in this section is supported by questions 32, 33 and 34. The specific data and supporting charts are provided in annex 1.

We have seen in section 7 that shoppers are very keen to receive information about the progress of their delivery and that email and SMS messaging are the preferred routes with another 4.5% wishing to use a smartphone app.

With 83% of respondents owning a smartphone and 86% accessing their emails on their mobile devices it is clear that these are integral to the online delivery process and experience.

This is consistently confirmed with the majority of consumers expecting to see at least the same delivery options when shopping on their mobile devices as they would find on the retailer’s main website.

In addition some of our respondents suggested further enhancements they might value, the most frequently mentioned relating to:

- Real time track and trace
- Real time ‘divert to neighbour’ option
- Recommending parcel shop or locker locations where the parcel could be taken if home delivery is inconvenient
- The ability to provide last minute delivery instructions / safe-place – perhaps with an image sent by return to show that delivery has been made as requested

If you were ordering online via your mobile, would you expect more / different delivery options?

- Yes
- No
- Maybe
13. Cross-border

The analysis in this section is supported by questions 35, 36, 37, 38, 39, 39.1 and 40. The specific data and supporting charts are provided in annex 1.

Additional information relating to cross-border ordering by UK consumers can be found in the E-Commerce Worldwide UK Passport.

In the UK we recognise that we have a thriving e-retail cross-border export market with an estimated 18% of all orders dispatched by UK retailers going to non-UK consumers. We also have an experienced and knowledgeable consumer base so it is no surprise that an increasing proportion of UK shoppers have purchased online from abroad17 & 18.

The most popular sources of such orders appear to be Europe (local) and the US (English language and popular global brands) but Asian retailers are close behind19.

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16 IMRG MetaPack Delivery Index

17 The eDigitalResearch and IMRG Customer Behaviour Report – 2015 advises:
- 69% of UK consumers will shop cross-border to find better prices
- 47% of UK consumers will shop cross-border to find the product they want
- 56% of UK consumers do not mind where the retailer is located as long as they sell right product at the right price

18 The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports a 5% year-on-year increase to 84% of its UK sample base

19 See annex 1 – question 37 and the 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports the top five countries for UK shoppers as:
- USA – 46%
- China – 44%
- Germany -22%
- France – 12%
- Japan – 9%
This rising trend is driven by the fact that most UK shoppers have had positive experiences when buying cross-border with almost 90% prepared to do so again and, for those who have yet to but cross-border, 35% have no problems with doing so and are likely to in the future\textsuperscript{20} & \textsuperscript{21}.

However, where barriers to this do exist it is delivery and returns that cause UK shoppers the most concerns:

- Lead times\textsuperscript{22}
- Tracking and transparency
- Credit and refund
- Higher costs for delivery and returns

What do you feel are the biggest barriers to buying goods from a non UK retailer?

\begin{itemize}
  \item Language – concerns about not understanding the order details
  \item Payment options – concerns that payment may not be convenient or secure
  \item Delivery – concerns about long delivery times and ability to track the order
  \item Returns – concerns about the ability to return unwanted orders and get a credit
  \item After sales – concerns that with an overseas retailer it might be harder to get help
  \item Higher costs – concerns that with an overseas retailer prices or delivery / returns costs might be higher
  \item Other
\end{itemize}

\textsuperscript{20} The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports the following level of dissatisfaction for purchases from:

- Germany – 2%
- USA – 3%
- China – 16%

\textsuperscript{21} The IPC Online Shopper Survey – January 2016 reports an 84% satisfaction score for cross-border delivery

\textsuperscript{22} The IPC Online Shopper Survey – January 2016 reports that within Europe, 50% of shoppers expect cross-border delivery within 4 to 5 days
14. Returns

The analysis in this section is supported by questions 3, 41, 41.1, 42 and 43. The specific data and supporting charts are provided in annex 1.

In section 3 we saw that UK shoppers are generally satisfied with the service they receive on delivery and in the previous section we confirm that this also applies to those orders sent by non-UK retailers.

However, then it comes to returns a different picture emerges. Although three-quarters of our respondents rate the quality of the return service as ‘important’ or ‘very important’ when selecting the retailer they will shop with, satisfaction with returns does not match that of delivery.

Overall, how happy are you with the Returns services for online shopping parcels?

Retailers should consider that during the returns process the customer feels they are carrying all of the risk:
- They have paid for their order and possibly delivery
- They may have had to pay for the return carriage
- They do not have any goods to show for their outlay

---

23 The MetaPack Delivering Consumer Choice Report 2015 confirms that consistently across all ages and regions, 81% of consumers would shop more with a retailer who makes returns easier.

24 The UK’s SME e-retailers recognise the importance of a good returns process. They believe it will make consumers more likely to be more satisfied with their service (49%), more likely to order in the first place (45%) and more likely to become repeat customers (40%). Royal Mail annual tracker survey into the expectations and ambitions of UK SME’s – January 2016.
Until a credit or replacement has been received the customer is understandably anxious and the sooner this anxiety is removed, the happier the customer will be and the more likely to return to shop again in the future. This anxiety is demonstrated by the fact that UK shoppers consider that the two most important elements in improving returns are:

- Confirmation that the parcel has been safely returned
- Access to real-time tracking information to show the status of the parcel

The next most important element is being able to quickly and conveniently hand the return over and here 74% of respondents prefer to have access to a convenient drop-off point.
Not surprisingly the most frequently used drop off location is the Post Office but an increasing proportion will use a manned parcel store rather than go back to the retailer’s store although this likely excludes returns made at the same time an order is picked up as an in-store click & collect.

The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey is consistent with our findings and confirms of its UK respondents that the locations most preferred for returns are Post Office – 46%, parcel shop – 17%, retailer’s store – 5%. The chart below shows how the UK differs from the German market where parcel shops are much more popular.

The fact that parcel shops are more popular for returns - than the retailer’s store which is far more popular for collections - shows that when a return is a separate transaction, the convenience of the handover point is all important.

We can also see that as collection services become available for returns the more popular they will become, although demand for collected returns will depend on additional cost and whether a specified time collection is available rather than relying on someone being home at any time of day or leaving the goods in a safe place.
15. Packaging and damage

The analysis in this section is supported by questions 44, 44.1, 45, 46 and 46.1. The specific data and supporting charts are provided in annex 1.

Consumers recollection of when they have received a damaged order appears to be improving according to the long term trend we see below and although there may have been some slippage in the past two years, the recollection of this damage being within the past 12 months, is down from 66% last year to 59% this year.

![Graph showing recollection of damaged orders over time]

Retailers, supported by their packaging partners are increasingly recognising the importance of getting packaging right in respect of:

- Safe arrival and the need to replace or refund damaged items
- Materials cost
- Distribution cost, especially with postal parcels and cross-border deliveries where the format and size of parcels can increase the cost of delivery
- Brand
- Customer perception and experience
- Environment

---

25 The 2015 Hermes Parcel Deliveries Usage and Attitudes Survey reports that 65% of its UK respondents do not like wasteful packaging
However, most of our respondents (42%) consider that the likely reason for the damage they experienced was inappropriate packaging.

- Too little
- Too much
- Too big for the item it contained
- Too big so that it prevented the item going through letterbox when it otherwise would have
- Other

The second most perceived reason for damage was handling by the delivery agent (that being the opinion of 40% of our respondents), which once again confirms the importance of delivery compliance – the ability to ensure that the delivery agent takes all due care and that the carrier is able to demonstrate this to the retailer and the retailer to the customer.
16. Environmental perception

The analysis in this section is supported by questions 47, 48, 48.1 and 48.2. The specific data and supporting charts are provided in annex 1.

Although respondents have reported that the main perceived reasons for damage is inappropriate packaging, the trend in the perception of this does continue to improve.

This positively contributes to consumers’ perception of ‘online’ as an environmentally positive way of shopping. However, although this is the view of most respondents (54%) the gap between online shopping and shopping in the high street is much reduced over the past two years, perhaps as the lines blur with the increase in click & collect / omni-channel shopping?

Almost three-quarters of respondents would consider favouring an environmentally sustainable delivery channel should one be available, only 30% would pay for this and the vast majority would limit their investment to £10 per annum (63%) and only about 20% would be prepared to pay more than £20. It would appear that if any environmentally sustainable delivery solutions are to seek consumer funding for support, it will not be significant.
17. Sample profile summary

The analysis in this section is supported by questions 49 to 55. The specific data and supporting charts are provided in annex 1.

The respondent sample is consistent and within the acceptable norm of the UK population and can therefore be considered valid both statistically and demographically. Points to note from this year's survey profile are as follows:

- Over the life of the survey the number of single person households has risen slightly but overall, low occupant responses (one or two person households) is consistent at about 57%
- The proportion of household occupants that are adult consumers remains consistent at circa three quarters of residents – 77% this year
- The average age of respondents is consistent year-on-year at an estimated 48
- The majority of respondents are women and in line with every other year at 56%
- The regional distribution of respondents is very similar to previous years and matches closely with the actual delivery of online orders (IMRG MetaPack Delivery Index)
- The type of area in which respondents live is very consistent and as with last year we find that suburban and town dwellers make up most of the respondents with inner city consumers providing the least
- The employment status of respondents is consistent with previous years with 64% in some sort of employment
- The estimated average income (of those who would offer this information) is up slightly year-on-year to £38.1k

![Which UK region do you live in?](image-url)
What sort of area do you live in?

- Inner City: 12.1% (2014/15), 14.0% (2015/16)
- Outskirts of a city: 23.7% (2014/15), 22.7% (2015/16)
- A large town: 19.1% (2014/15), 19.9% (2015/16)
- A small town: 27.8% (2014/15), 26.5% (2015/16)
- A rural area: 17.2% (2014/15), 16.8% (2015/16)
About the Author

Andrew is retained by IMRG as its head of e-logistics to run its e-retail delivery and logistics programme for the benefit of all IMRG members. He is also the founder of the strategic e-retail and postal consultancy Spiral4… and has a unique background in the world of parcels, packets and postal logistics with over 35 years’ experience gained from the commercial sector and the regulatory environment.

He is a member of the Chartered Institute of Logistics and Transport and the Institute of Direct Marketing and is a recognised expert on the UK postal and e-retail home delivery markets. He can be contacted at andrew.starkey@imrg.org or andrew@spiral4solutions.co.uk.

About IMRG

For over 20 years, IMRG (Interactive Media in Retail Group) has been the voice of e-retail in the UK. We are a membership community comprising businesses of all sizes – multichannel and pure-play, SME and multinational, and solution providers to industry.

We support our members through a range of activities – including market tracking and insight, benchmarking and best practice sharing. Our indexes provide in-depth intelligence on online sales, mobile sales, delivery trends and over 40 additional KPIs.

Our goal is to ensure our members have the information and resources they need to succeed in rapidly-evolving markets – both domestically and internationally.

About eDigitalResearch

At eDigitalResearch (edr), we empower business decisions through customer insight. By combining our proprietary SaaS technology with focused insight and thought leadership, we’re able to provide a truly unique solution – from real-time closed-loop customer feedback to Panels and Communities.

We’re world leaders in Voice of the Customer programmes and a proud part of MARU Group – a technology enabled professional services firm delivering information and insight. As part of MARU, we’re pioneering technology focused feedback and combining with deep thinking and an emphasis on actionable outputs for organisations.

MARU Group is an international insights pioneer with technology firmly at its heart. We’re growing – and as maru/edr, we’re delivering on our client promise of fast and strategic customer feedback.
About Blackbay

Blackbay delivers business transformation through innovative mobility solutions in the courier, express and parcel markets. The company has significant experience in this market, solutions to a growing list of premium clients including Australia Post, DHL, APC Overnight, Fastway, Staples, Office Depot, Toll and many more.

Blackbay currently supports over 150,000 mobile workers and manages in excess of 6,000,000 deliveries per day. Its strength is in delivering last-mile mobility solutions that enable organisations to improve the delivery experience for consumers through real-time track and trace and delivery process management.

Blackbay’s mobility platform combines unparalleled logistics expertise with extensive experience in developing and deploying mobile solutions to provide a platform that ensures efficient and quick development, and the flexibility to adapt to customer’s specific business processes and mobility needs.

The platform utilises an extensive library of processes and features enabling organisations to create their own applications including configuration of screens, process flows and logic. The platform is mobile OS agnostic ensuring configured applications have platform specific UI for iOS, Android and Windows Phone.

The company’s configurable flagship solution for T&L organisations, powered by the platform, delivers a comprehensive proof of delivery (PoD) and tracking solution that enables transport and logistics (T&L) organisations to improve efficiency, reduce cost, drive new revenues and increase customer satisfaction.

Drivers and depot workers are able to react to customer needs as they occur, while constantly keeping operations, management and customers informed with real-time updates on the performance of drivers, vehicles and progress of pick-ups and deliveries for recipients.

Among the solution benefits, the platform also enables:

- Faster time to market with configurable framework
- Seamless integration with 3rd Party systems in the logistics market
- Increased control and ability to adapt to market demands
- Ability to leverage proven industry expertise in Transport and Logistics market
- Flexible deployments in the cloud or on premise

Blackbay has enabled customers to derive the following benefits:

- 65 minutes saved per driver per day, the equivalent of 6,500 hours per annum
- Successful 1st time delivery rate of 98.9% saving £0.70 per parcel
- €3 additional revenue received per survey at the doorstep

In respect of the findings within the IMRG UK Consumer Home Delivery Review, Blackbay supports a number of solutions to improve delivery performance and consumer satisfaction and perceptions:

For more information, visit: www.blackbay.com or follow Blackbay on Twitter @BlackbayLtd
Additional Reference Sources

- **Hermes Parcel Deliveries 2015 Usage and Attitudes Survey** – 2070 UK consumer interviews – July / August 2015


- **MetaPack Delivery Consumer Choice** – 2015 – survey of 3,000 adult consumers – UK, US, France, Germany, Spain, Netherlands


- **IMRG – Collect+ Click & Collect Review 2016**

- **IMRG - MetaPack Delivery Index**
ANNEX 1 – Full data and charts

This annex contains the survey data going back up to eight years. Where the provision of a chart alone cannot fully represent the data, a data table has also been provided.

**Question 1**

<table>
<thead>
<tr>
<th>Survey Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Households - Online Shoppers</td>
</tr>
<tr>
<td>Number of residents</td>
</tr>
<tr>
<td>Residents over 18</td>
</tr>
</tbody>
</table>

**Question 2**

**Do delivery concerns ever prevent you from shopping online?**

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
<th>Linear (Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/09</td>
<td>49.4%</td>
<td>43.2%</td>
<td>46.5%</td>
</tr>
<tr>
<td>2009/10</td>
<td>44.5%</td>
<td>44.0%</td>
<td>44.5%</td>
</tr>
<tr>
<td>2010/11</td>
<td>44.5%</td>
<td>44.0%</td>
<td>44.5%</td>
</tr>
<tr>
<td>2011/12</td>
<td>40.3%</td>
<td>39.1%</td>
<td>39.8%</td>
</tr>
<tr>
<td>2012/13</td>
<td>39.1%</td>
<td>39.8%</td>
<td>39.8%</td>
</tr>
<tr>
<td>2013/14</td>
<td>39.8%</td>
<td>39.8%</td>
<td>39.8%</td>
</tr>
<tr>
<td>2014/15</td>
<td>39.8%</td>
<td>39.8%</td>
<td>39.8%</td>
</tr>
<tr>
<td>2015/16</td>
<td>39.8%</td>
<td>39.8%</td>
<td>39.8%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 513 from the full sample of 618
Question 3

Why do delivery concerns sometimes prevent you and people in your household from shopping online?

- Other (Please specify)
- The risk and possible inconvenience of having to return the order
- Order acceptance cut off time (i.e. Order before 2pm for delivery)
- Delivery is limited to the cardholder's address
- Can't easily find returns information
- Can't easily find delivery information
- The additional cost of home delivery
- The risk that goods may not arrive on time
- Delivery timeslots are too vague
- Delivery is too slow
- No convenient delivery option available
- Risk of failed delivery (due to no one at home to receive the item)
3. Why do delivery concerns sometimes prevent you and people in your household from shopping online?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk of failed delivery (due to no one at home to receive the item)</td>
<td>36.4%</td>
<td>56.3%</td>
<td>53.0%</td>
<td>64.2%</td>
<td>56.2%</td>
<td>44.4%</td>
<td>58.0%</td>
<td>65.2%</td>
</tr>
<tr>
<td>No convenient delivery option available</td>
<td>45.5%</td>
<td>40.3%</td>
<td>35.3%</td>
<td>36.4%</td>
<td>39.5%</td>
<td>41.0%</td>
<td>34.0%</td>
<td>41.0%</td>
</tr>
<tr>
<td>Delivery is too slow</td>
<td>29.6%</td>
<td>29.7%</td>
<td>38.4%</td>
<td>27.6%</td>
<td>35.2%</td>
<td>38.5%</td>
<td>32.0%</td>
<td>33.6%</td>
</tr>
<tr>
<td>Delivery timeslots are too vague</td>
<td>50.0%</td>
<td>37.5%</td>
<td>33.6%</td>
<td>43.3%</td>
<td>40.5%</td>
<td>35.1%</td>
<td>39.6%</td>
<td>45.5%</td>
</tr>
<tr>
<td>The risk that goods may not arrive on time</td>
<td>43.2%</td>
<td>39.6%</td>
<td>46.6%</td>
<td>42.7%</td>
<td>46.7%</td>
<td>37.0%</td>
<td>28.8%</td>
<td>40.2%</td>
</tr>
<tr>
<td>The additional cost of home delivery</td>
<td>45.5%</td>
<td>55.2%</td>
<td>69.3%</td>
<td>48.8%</td>
<td>60.0%</td>
<td>66.1%</td>
<td>57.6%</td>
<td>55.3%</td>
</tr>
<tr>
<td>Can't easily find delivery information</td>
<td>18.2%</td>
<td>13.5%</td>
<td>14.2%</td>
<td>12.4%</td>
<td>17.1%</td>
<td>21.1%</td>
<td>7.6%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Can't easily find returns information</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>23.6%</td>
<td>12.0%</td>
<td>17.2%</td>
</tr>
<tr>
<td>Delivery is limited to the cardholder's address</td>
<td>27.3%</td>
<td>20.8%</td>
<td>17.7%</td>
<td>20.3%</td>
<td>16.7%</td>
<td>16.5%</td>
<td>10.4%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Order acceptance cut off time (i.e. Order before 2pm for delivery)</td>
<td>9.1%</td>
<td>9.9%</td>
<td>9.5%</td>
<td>8.2%</td>
<td>7.6%</td>
<td>6.5%</td>
<td>7.2%</td>
<td>8.2%</td>
</tr>
<tr>
<td>The risk and possible inconvenience of having to return the order</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>28.3%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Other (Please specify)</td>
<td>6.0%</td>
<td>9.7%</td>
<td>9.5%</td>
<td>5.9%</td>
<td>4.4%</td>
<td>7.4%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The number of households answering this question was 244 from the full sample of 618
Question 4

Have you or people in your household ever abandoned an online purchase at the check-out stage specifically because of delivery concerns or issues?

The number of households answering this question was 612 from the full sample of 618

Question 4.1

Why have you or people in your household ever abandoned an online purchase at the check-out stage because of delivery concerns or issues?

The number of households answering this question was 293 from the full sample of 618
Question 5

Has a good delivery experience directly encouraged you to order again from a particular retailer?

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes (%)</th>
<th>No (%)</th>
<th>Maybe (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015/16</td>
<td>67.75</td>
<td>14.91</td>
<td>17.34</td>
</tr>
<tr>
<td>2014/15</td>
<td>69.4</td>
<td>15.3</td>
<td>15.3</td>
</tr>
<tr>
<td>2013/14</td>
<td>71.9</td>
<td>12.4</td>
<td>15.6</td>
</tr>
<tr>
<td>2012/13</td>
<td>74.1</td>
<td>11.7</td>
<td>14.2</td>
</tr>
<tr>
<td>2011/12</td>
<td>77.4</td>
<td>10.5</td>
<td>12.1</td>
</tr>
</tbody>
</table>

The number of households answering this question was 617 from the full sample of 618

Question 6

Has a customer review about a company's delivery service influenced your choice of retailer?

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes (%)</th>
<th>No (%)</th>
<th>Maybe (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015/16</td>
<td>29.4</td>
<td>51.8</td>
<td>18.8</td>
</tr>
<tr>
<td>2014/15</td>
<td>26.8</td>
<td>55.6</td>
<td>17.6</td>
</tr>
<tr>
<td>2013/14</td>
<td>34.5</td>
<td>45.4</td>
<td>20.1</td>
</tr>
<tr>
<td>2012/13</td>
<td>35.9</td>
<td>44.3</td>
<td>19.7</td>
</tr>
<tr>
<td>2011/12</td>
<td>35.4</td>
<td>47.1</td>
<td>17.5</td>
</tr>
<tr>
<td>2010/11</td>
<td>18.1</td>
<td>68.6</td>
<td>13.3</td>
</tr>
</tbody>
</table>

The number of households answering this question was 618 from the full sample of 618
**Question 7**

Have you or anyone in your household made an online purchase specifically as a result of a Black Friday discount?

![Pie chart showing responses to Question 7]

- Yes: 35.2%
- No: 64.8%

The number of households answering this question was 617 from the full sample of 618

**Question 7.1**

If Yes - Were you prepared to accept an extended delivery time?

![Pie chart showing responses to Question 7.1]

- Yes: 87.0%
- No: 13.0%

The number of households answering this question was 216 from the full sample of 618
Question 7.2

If No - Were you prepared to pay an additional delivery premium to get your purchase more quickly?

The number of households answering this question was 28 from the full sample of 618

Question 8

Overall, how satisfied are you with the delivery of your online shopping items?

The number of households answering this question was 613 from the full sample of 618
Question 9

When do you look for (expect to see) delivery information?

- You don't - you just go to checkout and then see what delivery options are offered
- After you have added products to your shopping cart
- Before you start shopping

The number of households answering this question was 616 from the full sample of 618
Question 10

Is there normally someone at home to receive deliveries during normal working / delivery hours?

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
<th>Some days</th>
<th>'No' or 'Some days'</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009/10</td>
<td>45.1%</td>
<td>17.5%</td>
<td>37.4%</td>
<td>54.9%</td>
</tr>
<tr>
<td>2010/11</td>
<td>44.7%</td>
<td>18.6%</td>
<td>36.7%</td>
<td>55.3%</td>
</tr>
<tr>
<td>2011/12</td>
<td>44.5%</td>
<td>21.3%</td>
<td>34.2%</td>
<td>55.5%</td>
</tr>
<tr>
<td>2012/13</td>
<td>46.4%</td>
<td>18.0%</td>
<td>35.6%</td>
<td>53.6%</td>
</tr>
<tr>
<td>2013/14</td>
<td>50.3%</td>
<td>15.1%</td>
<td>34.6%</td>
<td>49.7%</td>
</tr>
<tr>
<td>2014/15</td>
<td>51.3%</td>
<td>14.2%</td>
<td>34.5%</td>
<td>48.7%</td>
</tr>
<tr>
<td>2015/16</td>
<td>44.9%</td>
<td>18.3%</td>
<td>36.8%</td>
<td>55.1%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 612 from the full sample of 618
Question 11

Where do you normally have items delivered?

- Home
- Home – to a nominated ‘safeplace’ (shed, porch, locked box etc.)
- Home - only order items that will fit through the letter box
- Work
- Friend/Relative’s house (including neighbour)
- Alternative delivery location, (e.g. convenience store,)
- Post Office (‘Local Collect’)
- To the retailers store (‘Click & Collect’, ‘Reserve & Collect’ etc.)
- A range of the above
- Other (please specify)

Home as the normal delivery location

The number of households answering this question was 618 from the full sample of 618
**Question 12**

Do you have somewhere safe that parcels can be left when no one is home?

The number of households answering this question was 288 from the full sample of 618

**Question 12.1**

Where is that?

The number of households answering this question was 288 from the full sample of 618
**Question 12.2**

Would you like to be able to specify a particular safe-place / neighbour at time of order or are you happy for the delivery agent to use their discretion at time of delivery?

- Specify: 62.5%
- Delivery agents discretion: 37.5%

The number of households answering this question was 288 from the full sample of 618

**Question 12.3**

Would you like the delivery company to be able to confirm / demonstrate that they have followed your safe-place instructions?

- Yes: 94.4%
- Not necessary: 5.6%

The number of households answering this question was 285 from the full sample of 618
Question 13

Are your deliveries typically delivered successfully on the first attempt/expected day?

The number of households answering this question was 617 from the full sample of 618.

Question 14

What is the most frequent reason deliveries are not successful on the first attempt?
14. If orders have not been delivered to your expectation, what have been the most common reasons? Please tick all that apply

<table>
<thead>
<tr>
<th>Reason</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>No one is home to receive / item would not fit through the letter box / could not be left</td>
<td>63.3%</td>
<td>48.1%</td>
<td>50.6%</td>
</tr>
<tr>
<td>No one at home to receive / Signature required / could not be left</td>
<td>53.2%</td>
<td>40.5%</td>
<td>46.3%</td>
</tr>
<tr>
<td>Delivery didn't arrive as advised at time of order</td>
<td>40.5%</td>
<td>21.4%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Online tracking and actual delivery don't match (delivery did not arrive when advised to expect)</td>
<td>25.3%</td>
<td>12.8%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Parcel delivered to the Post office / depot and had to be collected</td>
<td>35.4%</td>
<td>26.6%</td>
<td>30.3%</td>
</tr>
<tr>
<td>Address inaccurate / redirected</td>
<td>6.3%</td>
<td>3.3%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Delivery failed completely</td>
<td>9.1%</td>
<td>11.2%</td>
<td></td>
</tr>
<tr>
<td>Item was broken</td>
<td>8.8%</td>
<td>8.6%</td>
<td></td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>6.3%</td>
<td>4.8%</td>
<td>5.0%</td>
</tr>
<tr>
<td>All my online orders have been delivered as I expected</td>
<td></td>
<td>18.4%</td>
<td>14.4%</td>
</tr>
</tbody>
</table>

The number of households answering this question was …. from the full sample of 618

Question 15

If a delivery fails, how far do you have to travel to collect an item (round trip)?

[Chart showing percentage of respondents for different travel distances from 2008/09 to 2015/16]
The number of households answering this question was 614 from the full sample of 618

**Question 16**

**How long does it take you to collect an item?**

The number of households answering this question was 617 from the full sample of 618

**Question 17**

**Would you like to receive information about the progress of your delivery?**

The number of households answering this question was 616 from the full sample of 618
Question 17.1

What parts of the delivery process would you be happy to be updated on?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Informing you about the progress of your order</td>
<td>72.3%</td>
<td>77.1%</td>
<td>71.7%</td>
<td>76.1%</td>
<td>69.7%</td>
<td>75.4%</td>
</tr>
<tr>
<td>Informing the dispatch date and tracking number</td>
<td>83.8%</td>
<td>84.3%</td>
<td>88.0%</td>
<td>84.0%</td>
<td>83.9%</td>
<td>85.6%</td>
</tr>
<tr>
<td>Warning in advance if there is a problem / delay with delivery</td>
<td>88.1%</td>
<td>87.9%</td>
<td>90.8%</td>
<td>89.3%</td>
<td>85.8%</td>
<td>88.0%</td>
</tr>
<tr>
<td>Confirming the expected delivery the day before delivery</td>
<td>80.6%</td>
<td>82.6%</td>
<td>83.7%</td>
<td>82.7%</td>
<td>81.2%</td>
<td>82.5%</td>
</tr>
<tr>
<td>Confirming the expected time (slot) when you can expect delivery</td>
<td>81.4%</td>
<td>83.0%</td>
<td>81.4%</td>
<td>81.2%</td>
<td>80.7%</td>
<td>82.8%</td>
</tr>
<tr>
<td>Informing you of a failed delivery</td>
<td>84.0%</td>
<td>83.4%</td>
<td>88.0%</td>
<td>85.9%</td>
<td>83.0%</td>
<td>87.7%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 599 from the full sample of 618
Question 17.2

Would you prefer to receive this information by:

<table>
<thead>
<tr>
<th>Year</th>
<th>SMS</th>
<th>E Mail</th>
<th>Using a purpose built ‘tracking app’ on a smart phone</th>
<th>Going to the retailer’s web site</th>
<th>Going to the carrier’s web site</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/09</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009/10</td>
<td>24.0%</td>
<td>68.2%</td>
<td></td>
<td></td>
<td></td>
<td>7.8%</td>
</tr>
<tr>
<td>2010/11</td>
<td>23.1%</td>
<td>67.5%</td>
<td></td>
<td></td>
<td></td>
<td>9.4%</td>
</tr>
<tr>
<td>2011/12</td>
<td>34.5%</td>
<td>56.1%</td>
<td></td>
<td>2.2%</td>
<td>1.1%</td>
<td>6.1%</td>
</tr>
<tr>
<td>2012/13</td>
<td>44.2%</td>
<td>48.3%</td>
<td></td>
<td>1.9%</td>
<td>0.9%</td>
<td>4.7%</td>
</tr>
<tr>
<td>2013/14</td>
<td>45.5%</td>
<td>43.5%</td>
<td>3.5%</td>
<td>1.6%</td>
<td>1.6%</td>
<td>4.2%</td>
</tr>
<tr>
<td>2014/15</td>
<td>38.3%</td>
<td>48.9%</td>
<td>4.0%</td>
<td>2.1%</td>
<td>2.9%</td>
<td>3.7%</td>
</tr>
<tr>
<td>2015/16</td>
<td>45.03%</td>
<td>44.18%</td>
<td>4.55%</td>
<td>2.87%</td>
<td>1.69%</td>
<td>1.69%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 593 from the full sample of 618
Question 17.3

When receiving pre-delivery alerts, of the following options, which would be the most convenient for you?

The number of households answering this question was 599 from the full sample of 618

Question 17.4

Would you pay a small (10p) fee for such a service?

The number of households answering this question was 599 from the full sample of 618
Question 18

Would you be happy for goods, even valuable items, to be left without a signature at your own risk?

The number of households answering this question was 618 from the full sample of 618.

Question 19

Instead of signing for them, would you be happy for goods to be left on a PIN accessed locker (at home or elsewhere)?

Instead of signing for them, would you be happy for goods to be left on a PIN accessed locker (at home or elsewhere)?
The number of households answering this question was 618 from the full sample of 618

**Question 20**

Would you be happy for a neighbour to sign on your behalf?

The number of households answering this question was 618 from the full sample of 618

**Question 21**

Over what value would you expect to have to sign for goods?
21. Over what value would you expect to have to sign for goods?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>More than £10</td>
<td>2.2%</td>
<td>8.5%</td>
<td>7.0%</td>
<td>6.5%</td>
<td>9.0%</td>
<td>8.3%</td>
<td>6.7%</td>
<td>3.6%</td>
</tr>
<tr>
<td>More than £20</td>
<td>10.0%</td>
<td>13.2%</td>
<td>13.8%</td>
<td>10.2%</td>
<td>15.5%</td>
<td>14.1%</td>
<td>13.9%</td>
<td>13.9%</td>
</tr>
<tr>
<td>More than £30</td>
<td>13.3%</td>
<td>14.4%</td>
<td>15.4%</td>
<td>14.4%</td>
<td>12.6%</td>
<td>12.7%</td>
<td>15.2%</td>
<td>15.2%</td>
</tr>
<tr>
<td>More than £40</td>
<td>5.6%</td>
<td>8.5%</td>
<td>7.6%</td>
<td>6.5%</td>
<td>6.9%</td>
<td>6.5%</td>
<td>6.1%</td>
<td>5.2%</td>
</tr>
<tr>
<td>More than £50</td>
<td>20.0%</td>
<td>21.8%</td>
<td>26.4%</td>
<td>22.8%</td>
<td>24.3%</td>
<td>25.8%</td>
<td>22.5%</td>
<td>23.9%</td>
</tr>
<tr>
<td>More than £75</td>
<td>2.2%</td>
<td>2.5%</td>
<td>2.6%</td>
<td>3.8%</td>
<td>1.9%</td>
<td>2.6%</td>
<td>2.5%</td>
<td>1.9%</td>
</tr>
<tr>
<td>More than £100</td>
<td>17.8%</td>
<td>11.4%</td>
<td>10.8%</td>
<td>10.0%</td>
<td>11.1%</td>
<td>10.5%</td>
<td>10.5%</td>
<td>13.3%</td>
</tr>
<tr>
<td>I expect to sign</td>
<td>28.9%</td>
<td>19.7%</td>
<td>15.0%</td>
<td>25.2%</td>
<td>18.2%</td>
<td>18.6%</td>
<td>20.3%</td>
<td>21.4%</td>
</tr>
<tr>
<td>regardless of value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would never expect</td>
<td>1.6%</td>
<td>0.7%</td>
<td>0.6%</td>
<td>0.9%</td>
<td>2.2%</td>
<td>1.6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>to sign for goods</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The number of households answering this question was 618 from the full sample of 618

Question 22

Have you, or those in your household, ever used Click and Collect services (either from the retailers store or a third party network) instead of having orders delivered to home?

The number of households answering this question was 617 from the full sample of 618
Question 22.1

What click and collect options have you previously used? Please tick all that apply

![Bar chart showing click and collect options](image)

The number of households answering this question was 412 from the full sample of 618

Question 23

If you could opt for an alternative delivery address / location where would you be likely to choose?

![Bar chart showing delivery address preferences](image)

The number of households answering this question was 412 from the full sample of 618
Question 24

If you ever use in store Click & Collect / Reserve & Collect, is it because...

<table>
<thead>
<tr>
<th>Reason</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery is free / cheaper than home delivery?</td>
<td>91.7%</td>
<td>57.3%</td>
<td>79.9%</td>
<td>78.7%</td>
</tr>
<tr>
<td>You are rarely at home to receive a home delivery?</td>
<td>23.3%</td>
<td>16.4%</td>
<td>19.8%</td>
<td>27.2%</td>
</tr>
<tr>
<td>You can examine / try on your purchase?</td>
<td>18.3%</td>
<td>10.7%</td>
<td>15.3%</td>
<td>14.7%</td>
</tr>
<tr>
<td>It is easier to return and get a credit if the goods are not wanted?</td>
<td>40.0%</td>
<td>15.0%</td>
<td>27.3%</td>
<td>29.3%</td>
</tr>
<tr>
<td>You are able to combine this with other shopping activity?</td>
<td>61.7%</td>
<td>31.8%</td>
<td>41.8%</td>
<td>46.7%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 375 from the full sample of 618

Question 25

When using a third party click and collect location (convenience store, petrol station etc), do you have a regular/preferred location?

- Yes - I always use the same one
- No - I use different ones
- No - I have only used this once / use it very infrequently

The number of households answering this question was 141 from the full sample of 618
Question 26

When using a third party click and collect location, do you prefer...

- A staffed (convenience store, petrol station) location
- An unstaffed locker location
- I have no preference as long as it’s convenient

The number of households answering this question was 142 from the full sample of 618

Question 27

If you could choose to have your parcel delivered to an alternative delivery location how far would you be prepared to travel to collect it (round trip)?

The number of households answering this question was 411 from the full sample of 618
Question 28

How much extra would you be willing to pay for a delivery to an alternative delivery location?

<table>
<thead>
<tr>
<th>Year</th>
<th>£0</th>
<th>£1</th>
<th>£2</th>
<th>£3</th>
<th>£4</th>
<th>£5</th>
<th>£6</th>
<th>£7</th>
<th>£8</th>
<th>£9</th>
<th>£10</th>
<th>£10+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/09</td>
<td>25%</td>
<td>30.8%</td>
<td>21.2%</td>
<td>5.8%</td>
<td>9.6%</td>
<td>1.9%</td>
<td>3.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1.9%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2009/10</td>
<td>69.7%</td>
<td>15.5%</td>
<td>6.7%</td>
<td>3.8%</td>
<td>2.0%</td>
<td>1.4%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2010/11</td>
<td>73.8%</td>
<td>13.4%</td>
<td>5.8%</td>
<td>3.2%</td>
<td>0.8%</td>
<td>3.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2011/12</td>
<td>68.8%</td>
<td>16.8%</td>
<td>7.5%</td>
<td>3.4%</td>
<td>1.2%</td>
<td>2.1%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2012/13</td>
<td>70.7%</td>
<td>13.4%</td>
<td>9.0%</td>
<td>2.9%</td>
<td>1.9%</td>
<td>1.7%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2013/14</td>
<td>76.5%</td>
<td>11.4%</td>
<td>6.2%</td>
<td>2.4%</td>
<td>0.9%</td>
<td>1.9%</td>
<td>0.3%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2014/15</td>
<td>79.1%</td>
<td>9.9%</td>
<td>4.7%</td>
<td>2.0%</td>
<td>1.5%</td>
<td>0.7%</td>
<td>0.7%</td>
<td>0.5%</td>
<td>0.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.2%</td>
</tr>
<tr>
<td>2015/16</td>
<td>75.0%</td>
<td>10.0%</td>
<td>8.5%</td>
<td>3.2%</td>
<td>0.7%</td>
<td>1.2%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.0%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 412 from the full sample of 618
Question 29

What would make receiving deliveries more convenient?

- Access to online order tracking
- An 'in transit' SMS or e mail giving the ability to change the delivery day or location
- An 'in transit' SMS or e mail to advise when delivery can be expected
- A call centre to help me rearrange a delivery
- A call centre contact to handle delivery queries
- Being able to select In Store 'Click and Collect' (delivery to the retailers local store for you to...
- Being able to select a 3rd Party Click and Collect location (staffed location or locker location) as...
- Clear delivery information prior to ordering
- Being able to select delivery to a 3rd Party Click and Collect location instead of a carrier depot if...
- Delivery to a 'safeplace' I specify when ordering (shed / garage, secure box, neighbour, etc)
- Being able to choose a same day delivery within a given time limit
- Being able to choose a specific delivery time slot
- Being able to choose an evening delivery option
- Being able to choose a Sunday delivery option
- Being able to choose a Saturday morning delivery option
- Being able to choose a specific delivery day
- Being able to add specific delivery instructions to your order

- 2015/16
- 2014/15
- 2013/14
- 2012/13
- 2011/12
- 2010/11
- 2009/10
- 2008/09
29. What would make receiving online orders more convenient? Proportion of respondents scoring 4 or 5 where 5 is 'Very important'  

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Being able to add specific delivery instructions to your order</td>
<td></td>
<td>66.3%</td>
<td>69.5%</td>
<td>68.6%</td>
<td>62.1%</td>
<td>63.0%</td>
<td>61.0%</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Being able to choose a specific delivery day</td>
<td>79.8%</td>
<td>81.8%</td>
<td>82.8%</td>
<td>79.7%</td>
<td>78.0%</td>
<td>74.0%</td>
<td>75.0%</td>
<td>72.8%</td>
<td>4</td>
</tr>
<tr>
<td>Being able to choose a Saturday morning delivery option</td>
<td>67.9%</td>
<td>63.5%</td>
<td>59.5%</td>
<td>47.9%</td>
<td>50.0%</td>
<td>47.3%</td>
<td>47.7%</td>
<td>48.2%</td>
<td>12</td>
</tr>
<tr>
<td>Being able to choose a Sunday delivery option</td>
<td>53.7%</td>
<td>50.2%</td>
<td>48.5%</td>
<td>34.8%</td>
<td>42.5%</td>
<td>41.1%</td>
<td>42.8%</td>
<td>45.6%</td>
<td>16</td>
</tr>
<tr>
<td>Being able to choose an evening delivery option</td>
<td>0.675</td>
<td>66.8%</td>
<td>63.3%</td>
<td>54.5%</td>
<td>56.1%</td>
<td>52.0%</td>
<td>50.2%</td>
<td>55.0%</td>
<td>9</td>
</tr>
<tr>
<td>Being able to choose a specific delivery time slot</td>
<td>71.3%</td>
<td>78.3%</td>
<td>76.4%</td>
<td>71.6%</td>
<td>72.6%</td>
<td>71.4%</td>
<td>66.7%</td>
<td>67.8%</td>
<td>5</td>
</tr>
<tr>
<td>Being able to choose a same day delivery within a given time limit</td>
<td></td>
<td>35.3%</td>
<td>38.3%</td>
<td>40.3%</td>
<td>38.9%</td>
<td>46.6%</td>
<td></td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Delivery to a 'safe-place' I specify when ordering (shed / garage, secure box, neighbour, etc.)</td>
<td>51.9%</td>
<td>50.9%</td>
<td>52.3%</td>
<td>52.0%</td>
<td>54.0%</td>
<td>51.6%</td>
<td>58.0%</td>
<td>51.8%</td>
<td>11</td>
</tr>
<tr>
<td>Being able to select delivery to a 3rd Party Click and Collect location instead of a carrier depot if I am not at home when the delivery is first attempted?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>39.1%</td>
<td>49.1%</td>
<td>51.9%</td>
</tr>
</tbody>
</table>
29. What would make receiving online orders more convenient? Proportion of respondents scoring 4 or 5 where 5 is 'Very important'

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Being able to select a 3rd Party Click and Collect location (staffed location or locker location) as your delivery address at time of order [Previously 1st option was PUDO and 2nd was Locker]</td>
<td>47.5%</td>
<td>46.6%</td>
<td>43.7%</td>
<td>37.5%</td>
<td>45.2%</td>
<td>36.7%</td>
<td>42.8%</td>
<td>46.8%</td>
<td>14</td>
</tr>
<tr>
<td>Being able to select In-Store 'Click and Collect' (delivery to the retailer's local store for you to collect) at time of order</td>
<td>22.4%</td>
<td>24.4%</td>
<td>21.6%</td>
<td>27.9%</td>
<td>34.3%</td>
<td>30.8%</td>
<td>26.8%</td>
<td>24.8%</td>
<td>26</td>
</tr>
<tr>
<td>A call centre contact to handle delivery queries</td>
<td>44.3%</td>
<td>43.7%</td>
<td>49.3%</td>
<td>46.6%</td>
<td>47.9%</td>
<td>48.5%</td>
<td>46.9%</td>
<td>45.1%</td>
<td>17</td>
</tr>
<tr>
<td>A call centre to help me rearrange a delivery</td>
<td>53.1%</td>
<td>53.5%</td>
<td>51.2%</td>
<td>50.8%</td>
<td>50.4%</td>
<td>50.3%</td>
<td>47.9%</td>
<td>47.9%</td>
<td>13</td>
</tr>
<tr>
<td>An 'in transit' SMS or e mail to advise when delivery can be expected</td>
<td>70.0%</td>
<td>74.7%</td>
<td>66.4%</td>
<td>74.7%</td>
<td>76.4%</td>
<td>76.4%</td>
<td>76.4%</td>
<td>76.4%</td>
<td>2</td>
</tr>
<tr>
<td>An 'in transit' SMS or e mail giving the ability to change the delivery day or location</td>
<td>60.8%</td>
<td>65.6%</td>
<td>67.3%</td>
<td>67.3%</td>
<td>67.3%</td>
<td>67.3%</td>
<td>67.3%</td>
<td>67.3%</td>
<td>6</td>
</tr>
<tr>
<td>Access to online order tracking</td>
<td>74.1%</td>
<td>77.7%</td>
<td>79.6%</td>
<td>85.2%</td>
<td>80.3%</td>
<td>75.4%</td>
<td>78.3%</td>
<td>78.3%</td>
<td>1</td>
</tr>
</tbody>
</table>
Options scoring 60%+

- Being able to add specific delivery instructions to your order
- Being able to choose a specific delivery day
- Being able to choose a specific delivery time slot
- Clear delivery information prior to ordering
- An 'in transit' SMS or e-mail to advise when delivery can be expected
- An 'in transit' SMS or e-mail giving the ability to change the delivery day or location

Alternative Delivery Options

- Delivery to a 'safeplace' I specify when ordering (shed / garage, secure box, neighbour, etc)
- Being able to select delivery to a 3rd Party Click and Collect location instead of a carrier depot if I am not at home when the delivery is first attempted?
- Being able to select a 3rd Party Click and Collect location (staffed location or locker location) as your delivery address at time of order [Previously 1st option was PUDO and 2nd was Locker]
- Being able to select In Store 'Click and Collect' (delivery to the retailers local store for you to collect) at time of order
Delivery Information and Tracking

Clear delivery information prior to ordering
An 'in transit' SMS or e-mail to advise when delivery can be expected
An 'in transit' SMS or e-mail giving the ability to change the delivery day or location

'Premium' Delivery Options

Being able to choose a specific delivery day
Being able to choose a Saturday morning delivery option
Being able to choose a Sunday delivery option
Being able to choose an evening delivery option
Being able to choose a specific delivery time slot
The number of households answering question 29 was 618 from the full sample of 618.
Question 29.1

For some of these options, how often have you used the following? (Often or Always)

<table>
<thead>
<tr>
<th>Option</th>
<th>2013/14</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>The option to add specific delivery instructions to your order</td>
<td>42.6%</td>
<td>40.0%</td>
<td>17.15%</td>
</tr>
<tr>
<td>A 3rd Party Click and Collect location as your delivery address at time of order</td>
<td>16.4%</td>
<td>21.4%</td>
<td>13.11%</td>
</tr>
<tr>
<td>In Store 'Click and Collect' (delivery to the retailers local store for you to collect)</td>
<td>36.9%</td>
<td>39.4%</td>
<td>15.5%</td>
</tr>
<tr>
<td>An 'in transit' SMS or e mail to change the delivery day or location</td>
<td>31.6%</td>
<td>31.6%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Same Day Delivery selected at the time or order</td>
<td>20.0%</td>
<td>12.9%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Weekend Delivery selected at the time or order</td>
<td>23.6%</td>
<td>16.7%</td>
<td>11.0%</td>
</tr>
<tr>
<td>Evening Delivery selected at the time or order</td>
<td>20.5%</td>
<td>12.0%</td>
<td>11.0%</td>
</tr>
<tr>
<td>Time Slot Delivery selected at the time or order</td>
<td>33.3%</td>
<td>16.7%</td>
<td>12.1%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 618 from the full sample of 618

Question 30

Would you be happy to pay for a delivery service where you could specify the time slot?

The number of households answering this question was 616 from the full sample of 618
Question 30.1

If you could specify a delivery time slot what would you consider an acceptable time slot?

<table>
<thead>
<tr>
<th></th>
<th>1 hour</th>
<th>2 hours</th>
<th>3 hours</th>
<th>4 hours</th>
<th>More than 4 hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/09</td>
<td>19.2%</td>
<td>65.4%</td>
<td>3.9%</td>
<td>1.9%</td>
<td>9.6%</td>
</tr>
<tr>
<td>2009/10</td>
<td>21.4%</td>
<td>51.8%</td>
<td>14.0%</td>
<td>9.7%</td>
<td>3.2%</td>
</tr>
<tr>
<td>2010/11</td>
<td>22.2%</td>
<td>50.5%</td>
<td>14.8%</td>
<td>9.2%</td>
<td>3.4%</td>
</tr>
<tr>
<td>2011/12</td>
<td>19.7%</td>
<td>56.8%</td>
<td>13.7%</td>
<td>7.3%</td>
<td>2.5%</td>
</tr>
<tr>
<td>2012/13</td>
<td>27.7%</td>
<td>51.9%</td>
<td>12.8%</td>
<td>5.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>2013/14</td>
<td>27.8%</td>
<td>51.4%</td>
<td>11.7%</td>
<td>6.8%</td>
<td>2.3%</td>
</tr>
<tr>
<td>2014/15</td>
<td>36.3%</td>
<td>49.8%</td>
<td>9.7%</td>
<td>3.1%</td>
<td>1.0%</td>
</tr>
<tr>
<td>2015/16</td>
<td>35.6%</td>
<td>48.4%</td>
<td>8.9%</td>
<td>4.3%</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 281 from the full sample of 618
Question 30.2

How much would you be willing to pay to specify the time slot?

The number of households answering this question was 280 from the full sample of 618
Question 31

Looking to the future, would you be prepared to...

- Have parcels delivered by ‘drone’
- Have parcels delivered to the boot of your car (at home or elsewhere)
- Have parcels delivered to a railway station for you to collect
- None of the above

The number of households answering this question was 618 from the full sample of 618

Question 32

Do you own a smartphone device?

The number of households answering this question was 615 from the full sample of 618
**Question 33**

Do you access your emails on a mobile device?

The number of households answering this question was 510 from the full sample of 618

**Question 34**

If you were ordering online via your mobile, would you expect more / different delivery options?

The number of households answering this question was 512 from the full sample of 618
Question 35

Have you ever bought goods from a ‘non UK’ web site?

The number of households answering this question was (underscoring not present) from the full sample of 618

Question 36

How frequently do you and those in your household buy from a non UK website?

The number of households answering this question was 393 from the full sample of 618
Question 37

When ordering from a non UK website in the past, what continent were the retailers based?

<table>
<thead>
<tr>
<th></th>
<th>Europe</th>
<th>Asia</th>
<th>USA</th>
<th>Australia</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15</td>
<td>57.4%</td>
<td>51.2%</td>
<td>57.1%</td>
<td>10.5%</td>
<td>4.0%</td>
</tr>
<tr>
<td>2015/16</td>
<td>56.8%</td>
<td>52.8%</td>
<td>59.8%</td>
<td>11.8%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 400 from the full sample of 618

Question 38

What sort of goods have you bought from a non UK website in the past?

<table>
<thead>
<tr>
<th>Category</th>
<th>2015/16</th>
<th>2014/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>15.5%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Gifts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health and Beauty (e.g. cosmetics or pharmacy products)</td>
<td>6.5%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Home and consumer electronics</td>
<td>23.3%</td>
<td>23.3%</td>
</tr>
<tr>
<td>Furniture, DIY and gardening</td>
<td>5.5%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Food, drink and household supplies</td>
<td>5.5%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Clothing, footwear and jewellery</td>
<td>40.8%</td>
<td>44.5%</td>
</tr>
<tr>
<td>Books, CDs, music, games, videos/DVDs and software</td>
<td>52.8%</td>
<td>43.4%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 400 from the full sample of 618
### Question 39

**Would you buy goods from a 'non UK' web site again?**

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015/16</td>
<td>87.9%</td>
<td>12.1%</td>
</tr>
<tr>
<td>2014/15</td>
<td>90.3%</td>
<td>9.7%</td>
</tr>
<tr>
<td>2013/14</td>
<td>89.1%</td>
<td>10.9%</td>
</tr>
<tr>
<td>2012/13</td>
<td>87.8%</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 396 from the full sample of 618

### Question 39.1

**Would you consider buying goods from a 'non UK' website in the future?**

(If those who have not yet purchased cross-border)

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012/13</td>
<td>42.5%</td>
<td>57.5%</td>
</tr>
<tr>
<td>2013/14</td>
<td>36.0%</td>
<td>64.0%</td>
</tr>
<tr>
<td>2014/15</td>
<td>33.1%</td>
<td>66.9%</td>
</tr>
<tr>
<td>2015/16</td>
<td>35.5%</td>
<td>64.5%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 211 from the full sample of 618
Question 40

What do you feel are the biggest barriers to buying goods from a non UK retailer?

<table>
<thead>
<tr>
<th>Language - concerns about not understanding the order details</th>
<th>Payment options - concerns that payment may not be convenient or secure</th>
<th>Delivery - concerns about long delivery times and ability to track the order</th>
<th>Returns - concerns about the ability to return unwanted orders and get a credit</th>
<th>After sales - concerns that with an overseas retailer it might be harder to get help</th>
<th>Higher costs - concerns that with an overseas retailer prices or delivery / returns costs might be higher</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012/13</td>
<td>25.8%</td>
<td>52.3%</td>
<td>62.6%</td>
<td>59.4%</td>
<td>48.4%</td>
<td>47.7%</td>
</tr>
<tr>
<td>2013/14</td>
<td>23.3%</td>
<td>51.0%</td>
<td>62.4%</td>
<td>64.9%</td>
<td>52.5%</td>
<td>55.9%</td>
</tr>
<tr>
<td>2014/15</td>
<td>37.4%</td>
<td>53.7%</td>
<td>59.3%</td>
<td>59.8%</td>
<td>48.6%</td>
<td>55.6%</td>
</tr>
<tr>
<td>2015/16</td>
<td>29.9%</td>
<td>48.9%</td>
<td>66.8%</td>
<td>69.0%</td>
<td>47.3%</td>
<td>45.7%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 184 from the full sample of 618
Question 41

Overall, how happy are you with the Returns services for online shopping parcels?

The number of households answering this question was 616 from the full sample of 618

Question 41.1

How important is the quality of the returns service to you and those in your household when selecting the retailers you will shop with?

The number of households answering this question was 617 from the full sample of 618
**Question 42**

How important would the following aspects be in making a returns service more convenient for you?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to a convenient drop off location</td>
<td>67.4%</td>
<td>38.9%</td>
<td>54.8%</td>
<td>49.3%</td>
<td>56.4%</td>
<td>48.0%</td>
<td>48.1%</td>
<td>54.05%</td>
</tr>
<tr>
<td>A collection service when you have to be there</td>
<td>67.8%</td>
<td>44.9%</td>
<td>52.9%</td>
<td>49.3%</td>
<td>71.1%</td>
<td>64.7%</td>
<td>59.1%</td>
<td>54.05%</td>
</tr>
<tr>
<td>A collection service where you can specify the collection time slot</td>
<td>68.6%</td>
<td>46.4%</td>
<td>69.3%</td>
<td>49.3%</td>
<td>56.4%</td>
<td>48.0%</td>
<td>48.1%</td>
<td>45.15%</td>
</tr>
<tr>
<td>A collection service where you don't have to be there. Goods left in</td>
<td>68.8%</td>
<td>49.3%</td>
<td>71.1%</td>
<td>64.7%</td>
<td>71.1%</td>
<td>59.1%</td>
<td>59.1%</td>
<td>77.02%</td>
</tr>
<tr>
<td>a ‘safe place’</td>
<td>66.9%</td>
<td>41.7%</td>
<td>64.0%</td>
<td>59.1%</td>
<td>48.0%</td>
<td>48.1%</td>
<td>48.1%</td>
<td>77.02%</td>
</tr>
<tr>
<td>Confirmation that your return parcel has been received</td>
<td>71.3%</td>
<td>43.4%</td>
<td>71.1%</td>
<td>59.1%</td>
<td>71.1%</td>
<td>59.1%</td>
<td>59.1%</td>
<td>77.02%</td>
</tr>
<tr>
<td>Access to tracking information to confirm safe arrival of your return</td>
<td>73.62%</td>
<td>41.26%</td>
<td>54.05%</td>
<td>45.15%</td>
<td>71.1%</td>
<td>59.1%</td>
<td>59.1%</td>
<td>77.02%</td>
</tr>
<tr>
<td>Confirmation that your return parcel has been received</td>
<td>74.0%</td>
<td>41.26%</td>
<td>54.05%</td>
<td>45.15%</td>
<td>71.1%</td>
<td>59.1%</td>
<td>59.1%</td>
<td>77.02%</td>
</tr>
</tbody>
</table>

The number of households answering this question was 618 from the full sample of 618
Question 43

When making a return, do you prefer it when you can...

![Bar chart showing preferences for making returns.]

The number of households answering this question was 614 from the full sample of 618

Question 44

Have you ever received an item that was damaged?

![Bar chart showing the percentage of households receiving damaged items over the years.]

The number of households answering this question was 616 from the full sample of 618
Question 44.1

In your opinion why was that?

The number of households answering this question was 306 from the full sample of 618.

Question 45

Did the most recent delivery of a damaged item take place in the last....

The number of households answering this question was 306 from the full sample of 618.
**Question 46**

Have you ever received an item with inappropriate packaging?

The number of households answering this question was 616 from the full sample of 618

**Question 46.1**

Was the packaging?

The number of households answering this question was 256 from the full sample of 618
Question 47

Which do you think is more environmentally friendly?

- Shopping online
- Shopping in the high street
- Linear (Shopping online)

The number of households answering this question was 616 from the full sample of 618

Question 48

Distribution contributes significantly to the UK’s carbon footprint. If a carbon-friendly delivery alternative was available, would you choose it over a traditional method?

- Yes
- No
- Linear (Yes)

The number of households answering this question was 617 from the full sample of 618
Question 48.1

Would you be prepared to pay more in delivery charges for this?

The number of households answering this question was 444 from the full sample of 618

Question 48.2

How much more per year would you be willing to pay?

The number of households answering this question was 132 from the full sample of 618
Question 49

How many people are there in your household?

- Just me: 17.1%
- 2: 40.8%
- 3: 15.7%
- 4: 16.5%
- 5: 5.7%
- 6: 2.7%
- 7, 8: 0.6%
- 9: 0.0%
- 10 or more: 0.3%

Question 49.1

How many of these are under 18?

- None: 68.5%
- 1: 14.5%
- 2: 10.9%
- 3: 2.8%
- 4: 2.2%
- 5, 6, 7, 8, 9: 0.3%
- 10 or more: 0.0%
Question 50

Gender

- Male: 44.4%
- Female: 55.6%

Question 51

Age of respondent

- Under 18: 0.0%
- 18-24: 14.2%
- 25-34: 17.9%
- 35-44: 22.4%
- 45-54: 19.6%
- 55-64: 21.3%
- 65+: 4.7%
Question 52

Do you live in the UK?

- Yes: 97.6%
- No: 2.4%

Question 52.1

Which UK region do you live in?

- Scotland: Respondents 6.95%, Location 8.74%
- Wales: Respondents 4.52%, Location 4.30%
- Northern Ireland: Respondents 0.65%, Location 2.40%
- South West: Respondents 8.40%, Location 7.50%
- South East: Respondents 16.80%, Location 17.30%
- London: Respondents 15.51%
- West Midlands: Respondents 7.27%, Location 8.40%
- East Midlands: Respondents 11.80%
- North West: Respondents 12.76%, Location 12.60%
- North East: Respondents 7.30%, Location 13.09%
Question 52.2

What sort of area do you live in?

<table>
<thead>
<tr>
<th>Area</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inner City</td>
<td>12.1%</td>
<td>14.0%</td>
</tr>
<tr>
<td>Outskirts of a city</td>
<td>23.7%</td>
<td>22.7%</td>
</tr>
<tr>
<td>A large town</td>
<td>19.1%</td>
<td>19.9%</td>
</tr>
<tr>
<td>A small town</td>
<td>27.8%</td>
<td>26.5%</td>
</tr>
<tr>
<td>A rural area</td>
<td>17.2%</td>
<td>16.8%</td>
</tr>
</tbody>
</table>

Question 53

What is your employment status?

<table>
<thead>
<tr>
<th>Status</th>
<th>2014/15</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee - full time</td>
<td>43.3%</td>
<td></td>
</tr>
<tr>
<td>Employee - part time</td>
<td>11.5%</td>
<td></td>
</tr>
<tr>
<td>Self employed</td>
<td>9.1%</td>
<td></td>
</tr>
<tr>
<td>Unemployed</td>
<td>4.6%</td>
<td></td>
</tr>
<tr>
<td>Student</td>
<td>1.7%</td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td>17.8%</td>
<td></td>
</tr>
<tr>
<td>Looking after home/family</td>
<td>7.2%</td>
<td></td>
</tr>
<tr>
<td>Permanently sick/disabled</td>
<td>3.8%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>0.9%</td>
<td></td>
</tr>
</tbody>
</table>
Question 54

What is your occupation?

[Diagram showing occupation distribution]

- Chairman: 0.9%
- Managing Director: 1.2%
- Director (CEO, CFO, COO): 1.6%
- Self-employed / Business Owner: 1.9%
- Manager: 8.1%
- Middle Manager: 9.8%
- Professional: 7.6%
- Sales person: 12.0%
- Public Sector: 11.7%
- Office / Administrative: 4.0%
- Craftsperson / Tradesperson: 5.6%
- Farmer: 0.3%
- Student: 0.2%
- Homemaker: 1.7%
- Other: 19.0%

Question 55

What is your annual household income before tax and deductions?

[Diagram showing income distribution]

- Under £10,000: 7.8%
- £10,000-£19,999: 16.3%
- £20,000-£29,999: 16.3%
- £30,000-£39,999: 12.9%
- £40,000-£49,999: 11.6%
- £50,000-£59,999: 6.4%
- £60,000-£69,999: 3.6%
- £70,000-£79,999: 2.5%
- £80,000-£89,999: 1.4%
- £90,000-£99,999: 2.0%
- £100,000 and over: 5.3%
- Prefer not to say: 13.8%