



Consumer experiences of retailers not delivering to Northern Ireland

July 2024

Consumer Council for Northern Ireland

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Executive summary

In March 2023, the Consumer Council for Northern Ireland conducted a survey with Northern Ireland (NI) consumers on their experiences of retailers in Great Britain (GB) and European Union (EU) and online marketplace retailers, not delivering to NI.

The Consumer Council has monitored this issue since January 2021, after a number of consumers reported retailers not delivering to NI, stating that EU Exit was the reason. This report presents the findings from this survey which is based on 1,005 interviews with an online panel of consumers, representative of all NI adults. It provides insights into consumer experiences of retailers not delivering to NI. Some insights included:

- Retailers did not typically provide an explanation of why items cannot be delivered to NI.
- Where an explanation was provided, retailers typically cited being unable to ship products, additional delivery costs, additional customer processes, and EU Exit.
- Where retailers do deliver to NI, many consumers report certain conditions are applied such as weight restrictions, additional delivery delays, additional delivery fees, and consumers needing to spend a certain amount to secure delivery to NI.
- Most consumers who have experienced problems say they now shop less with both GB and EU retailers.

It should be noted that NI has experienced delivery differences from the rest of the UK, and this pre-dates EU Exit, the NI Protocol and the Windsor Framework. This is often due to the commercial decisions made by retailers and parcel operators.

This research report only presents the experiences of consumers when trying to purchase goods online in March 2023, and provides no evidence of decisions made by retailers or parcel operators in relation to business-to-consumer deliveries to NI.

The survey was conducted independently by Social Market Research (SMR) and in accordance with the ISO20252 Standard.

Key findings

General online shopping

- 95% of consumers state that they shop online, with the majority of consumers doing so at least a few times a month (84%).

Difficulty receiving goods since EU Exit

- 68% of NI consumers have experienced difficulty in receiving goods from retailers to their address since January 2021.

- Among those experiencing difficulties in receiving goods from retailers, 80% had experienced issues with GB retailers, 39% had experienced issues with EU retailers, and 2% had experienced issues with retailers based in other locations.

Retailers not delivering to NI

- 86% of consumers who shop online said they have found that items they were looking for could not be delivered to an NI address.
- We asked consumers to identify at what point in their buying journey they were informed that an item could not be delivered to NI.
 - The most common response from consumers was when checking out/paying for goods (67%).
 - The other common stages consumers discovered items could not be delivered to NI included: when adding an item to a shopping basket (32%) and when browsing or clicking onto the item/stock availability check (28%).
- Since January 2021, the majority of consumers (76%) stated they have experienced online markets which do not deliver to NI. This was followed by GB retailers not delivering (43%) and EU retailers not delivering (16%). Ten percent of consumers also experienced retailers from outside GB or EU which do not deliver to NI.
- The most common business sectors that consumers said do not deliver to NI included: home products (including furniture), garden (plants and seeds) and clothing and footwear.

Reasons why online marketplaces and retailers do not deliver to NI

- 38% of consumers said that online marketplaces gave no explanation for not delivering to NI (GB retailers, 42%; EU retailers, 25%).
- Being unable to ship certain products or product lines was cited as a reason for not delivering to NI consumers (online marketplaces, 29%; GB retailers, 27%; EU retailers, 31%).
- Other common reasons for not delivering to NI included: additional cost of delivery; additional customs processes/paperwork to deliver to NI; Brexit; supply chain issues; and customs related issues.

Online marketplaces and retailers who will only deliver to NI under certain conditions

- Consumers experiencing issues with deliveries to NI said online marketplaces and retailers would only deliver to NI under certain conditions, the most common of which included: weight restrictions and non-delivery of larger items; additional delivery delays to NI and certain products/product lines being unavailable.

Retailers who stopped delivering to NI but later resumed delivering to NI

- 30% of consumers who had experienced issues with GB retailers delivering to NI said that they had experienced GB retailers who had stopped but later resumed delivering to NI (EU retailers, 35%).
- The most common sectors that had stopped but later resumed delivering to NI included: clothing and footwear (GB retailers, 40%; EU retailers, 36%) home products including furniture (GB retailers, 36%; EU retailers, 20%); food and non-alcoholic drinks (GB retailers, 30%; EU retailers, 26%).
- The most common reasons why retailers had stopped but later resumed delivering to NI included: additional customs processes/paperwork to deliver to NI (GB retailers, 33%; EU retailers, 32%); supply chain issues (GB retailers, 28%; EU retailers, 34%) and Brexit (GB retailers, 27%; EU retailers, 19%).

The Consumer Council

The Consumer Council for Northern Ireland (Consumer Council) is committed to ensuring positive outcomes for consumers in Northern Ireland. Our principal statutory duty is to safeguard their interests. We are an insight-led evidence based organisation:

- providing consumers with expert advice and confidential guidance;
- engaging with government, regulators and consumer bodies to influence public policy;
- empowering consumers with the information and tools to build confidence and knowledge;
- investigating and resolving consumer complaints under statutory and non-statutory functions;
- undertaking best practice research to identify and quantify emerging risks to consumers; and
- campaigning for market reform as an advocate for consumer choice and protection.

We have specific statutory functions in consumer affairs, energy, transport, water and sewerage, postal services and food affordability and accessibility. Non-statutory functions educate, empower and support consumers against discriminatory practices in any market through advocacy work, and education and outreach programmes on consumer rights, safer finances or a more sustainable energy future.

We are the trusted, independent voice of Northern Ireland consumers. We achieve this by responding to enquiries, providing expert advice, investigating complaints, conducting independent research, advocating across consumer issues, delivering information campaigns, influencing public policy, and advising policy makers, regulators, trading standards authorities and ombudsman services on matters of consumer rights and protection. In everything we do, we prioritise consumers:

- who are disabled or chronically sick;
- who are of pensionable age;
- who are on low incomes; and
- who live in rural areas.

We have responsibilities under the Rural Needs Act 2016 and Section 75 of the Northern Ireland Act 1998. In these roles, we aim to ensure government policies recognise consumer needs in rural areas, and promote equality of opportunity and good relations across a range of equality categories.

Introduction and methodology

On 31 of January 2020 the United Kingdom (UK) officially withdrew its membership from the EU. The NI Protocol was later introduced (1 January 2021) and set out NI's relationship with GB and the EU with the aim of facilitating trade and cooperation.

Under this arrangement, NI is in the EU's single market for goods, allowing goods to flow freely across the island, and with the EU. This was designed to avoid customs tariffs, customs declarations and customs controls on trade between NI and the EU. However, these arrangements necessitated checks and customs controls on goods entering NI from GB. On 27 February 2023 the UK and the EU agreed the Windsor Framework, providing a new set of arrangements designed to restore the smooth flow of trade within the UK internal market and ease custom checks on goods arriving from GB.

The long term impact of the NI Protocol and the implementation of the Windsor Framework arrangements on parcel movements remains unclear. The Consumer Council will continue to monitor how the Windsor Framework is being implemented and the potential impact that consumers may face. It should be noted that NI has experienced delivery differences from the rest of the UK, and these issues pre-date EU Exit, the NI Protocol and the Windsor Framework. This is often due to the commercial decisions made by retailers and parcel operators.

Introduction

Since January 2021, the Consumer Council has monitored, as accurately as it can, the number of retailers who do not deliver to NI, stating that EU Exit or added restrictions are the reason. This monitoring is conducted via web scraping and through consumer contact. Our monitoring found that the majority of consumers who reported non-delivery or delivery issues, experienced these issues with retailers from GB.

The Consumer Council publishes a quarterly, '*Overview Note: GB retailers not delivering to Northern Ireland*'¹, which monitors the number of GB retailers that have ceased delivering to NI citing EU Exit as the reason. This tracks GB retailers from June 2021 with the most recent publication issued on March 2024, finding a steady increase in retailers who stopped but later resumed delivery to NI.

The Consumer Council conducts annual research to monitor the extent to which consumers experienced issues with online shopping and receiving goods². This highlighted the extent to which consumers shop online (94%) and the amount of goods which are purchased from GB retailers (75%). This research also found:

- 40% of consumers experienced GB retailers who do not deliver to NI in 2023 (77% in 2022, 68% in 2021).
- 19% of consumers had experienced EU retailers who do not deliver to NI.

¹ [Overview Note: GB retailers not delivering to Northern Ireland](#), Consumer Council, January 2024

² [Northern Ireland consumers and EU Exit: An overview of EU Exit experiences in 2023](#), Consumer Council, December 2023

Consumers also reported a large amount of goods not being delivered to NI were from online marketplaces and third-party sellers using websites such as eBay or amazon. Therefore, we estimate that the extent of goods unable to be delivered to NI is likely more comprehensive than our previous monitoring could record.

Purpose

The research project aims to better understand consumer experiences of retailers who have not delivered to NI since January 2021, specifically:

- The extent to which NI consumers experience non-delivery issues.
- The business sectors which do not deliver to NI consumers.
- The online marketplaces that do not deliver to NI consumers.
- The stage at which consumers are made aware goods cannot be delivered to NI.
- The reasons given for GB and EU retailers not delivering to NI.

Methodology

This research was conducted by Social Market Research (SMR) in line with ISO20252. The survey is based on 1,005 interviews with consumers. Interviews were conducted using an online panel methodology with adults aged 18+. Survey fieldwork and data analysis were conducted between March and April 2023.

Sample profile

Table 1 presents the weighted sample profile compared with known population parameters and shows that sample estimates are in line with census estimates. The 95% Confidence Intervals are also presented.

Table 1: Sample Profile Compared with NI Population Profile

NI Population aged 18+ [n=1005]		Census (%)	Sample (%)	95% Confidence Interval (+/-)
Sex	Male	48	49	45.9-52.1
	Female	52	51	47.9-54.1
Age	18-29	31	28	25.2-30.8
	30-59	42	43	39.9-46.1
	60+	27	29	26.2-31.8
Social Class	ABC1	47	47	43.9-50.1
	C2DE	53	53	49.9-56.1
Local Government District	Antrim and Newtownabbey	8	8	6.3-9.7
	Ards and North Down	9	9	7.2-10.8
	Armagh City, Banbridge and Craigavon	10	10	8.1-11.9
	Belfast	18	18	15.6-20.4
	Causeway Coast and Glens	8	8	6.3-9.7
	Derry City and Strabane	8	8	6.3-9.7
	Fermanagh and Omagh	6	6	4.5-7.5
	Lisburn and Castlereagh	8	8	6.3-9.7
	Mid and East Antrim	7	7	5.4-8.6
	Mid Ulster	8	8	6.3-9.7
	Newry, Mourne and Down	10	10	8.1-11.9
Source: NI Census of Population (2021 Mid-Year Estimates)				

Prior to analysis the sample has been weighted by gender, age, socio-economic group and area of residence. Note:

- Due to rounding, row and column totals in tables and figures may not sum to 100.
- Any differences between consumer subgroups (e.g. age, gender, social class etc.) alluded to in the report commentary are statistically significant to at least the 95% confidence level. The use of [-] within tables denotes less than 1%.

General online shopping

1. Shopping online

More than nine out of ten (95%) consumers state that they shop online.



2. Frequency of buying goods online

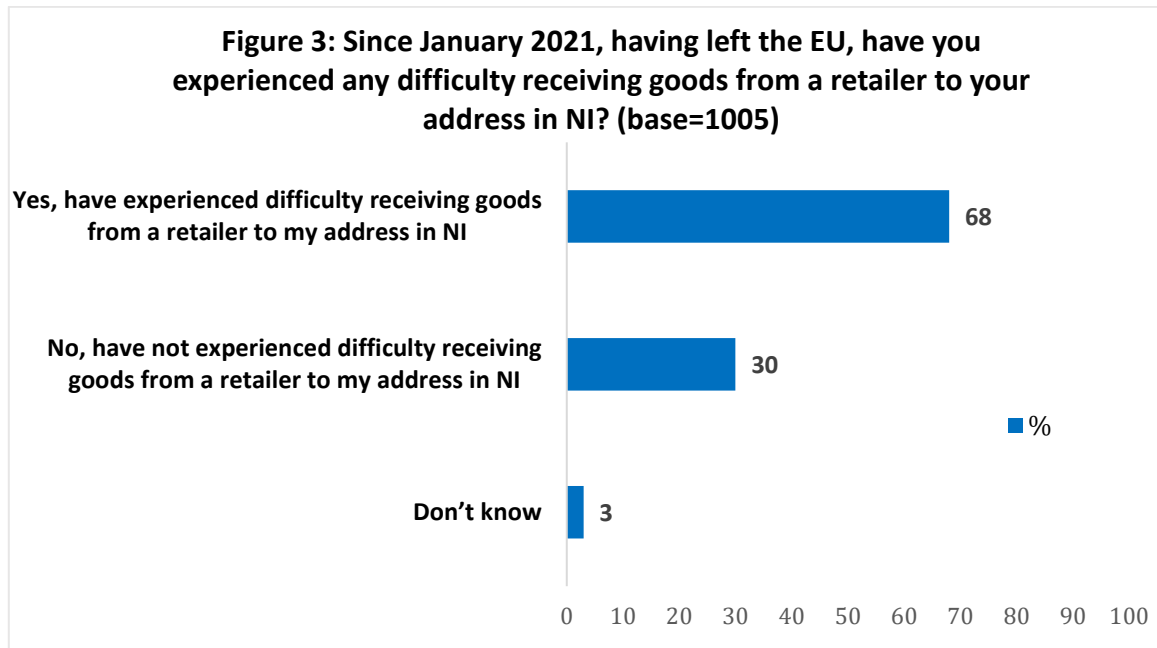
Consumers were asked how often they buy goods online that are delivered to an NI address. 6% of survey respondents shop online daily, 24% a few times a week, 17% once a week, 37% around 1-3 times a month, 13% do so every few months, and 2% less than every few months.



Difficulty receiving goods

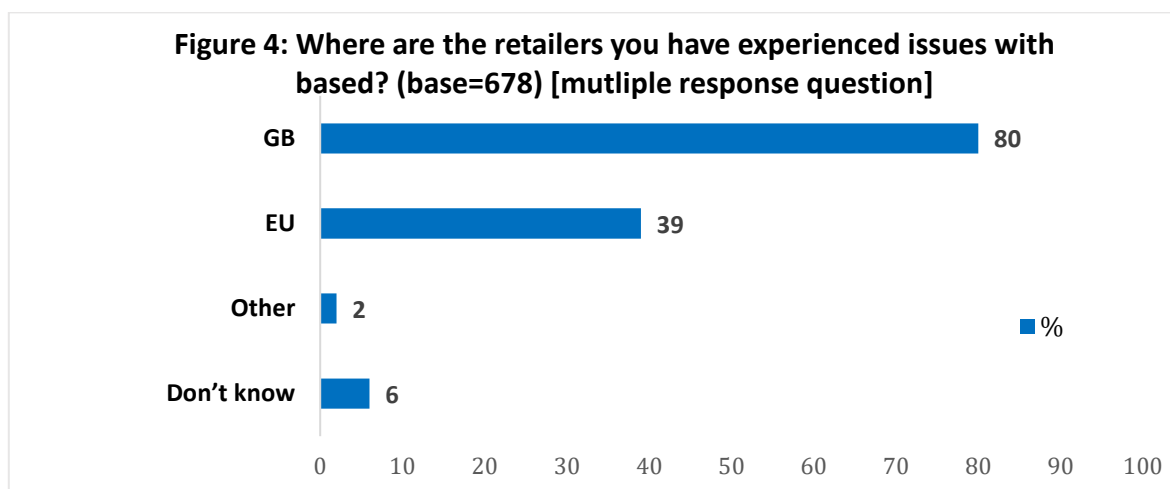
3. Delivery issues

Since January 2021, 68% of consumers said they have experienced difficulty receiving goods from a retailer to their address in NI, 30% have not experienced any difficulty, and 3% answered, don't know.



4. Delivery issues by retailer location

Consumers who had experienced difficulty (n=678) receiving goods to their address in NI were asked where these retailers were based. 80% of consumers said they are based in GB, 39% in the EU, and 2% in other locations³. Six percent couldn't recall the location of the retailer. Note consumers may have experienced issues with retailers in multiple locations.

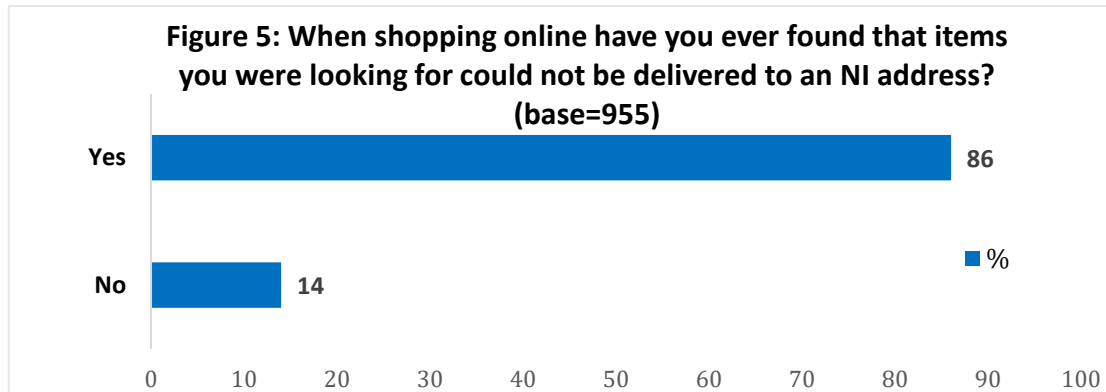


³ Included: US (n=12); China (n=2); Slovakia (n=1); Australia (n=1); and, international (n=1).

Retailers not delivering to NI

5. Non-delivery when shopping online

Among those who shop online, most consumers (86%) have found that items they were looking for could not be delivered to an NI address.

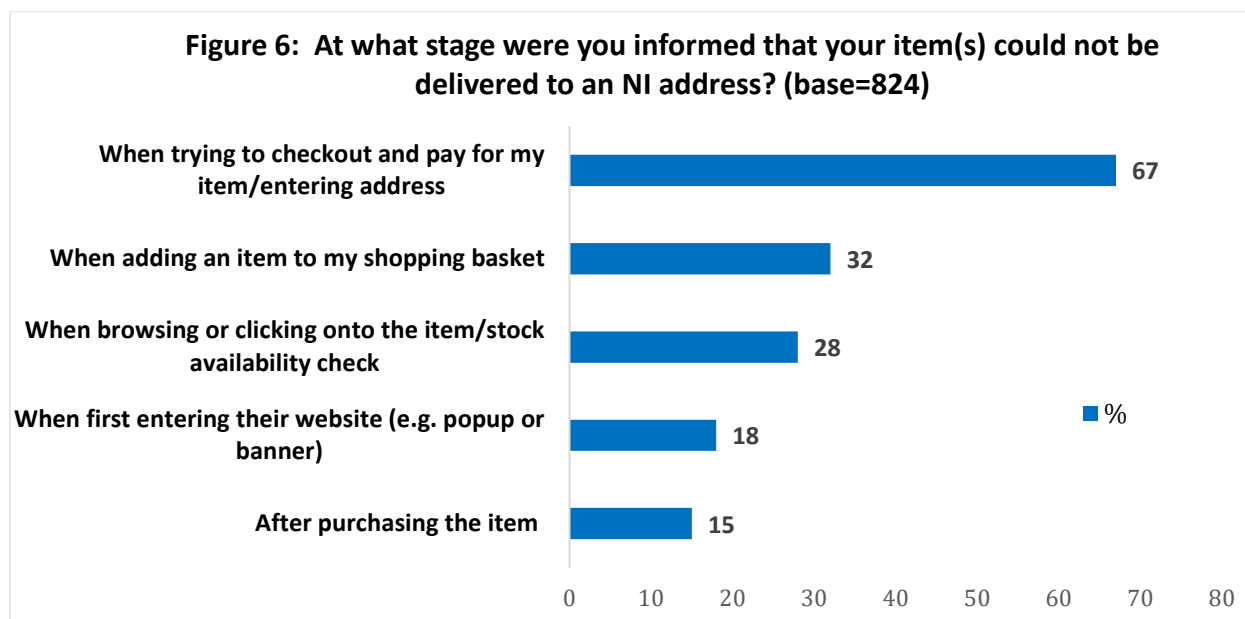


6. Stage at which consumers were informed items could not be delivered to NI

Consumers who shop online were asked at what stage in the buying process they were informed that items could not be delivered to an NI address.

The survey found 'when trying to checkout and pay for items/entering address' was the most common stage (67%) at which consumers were informed that their items could not be delivered to an NI address.

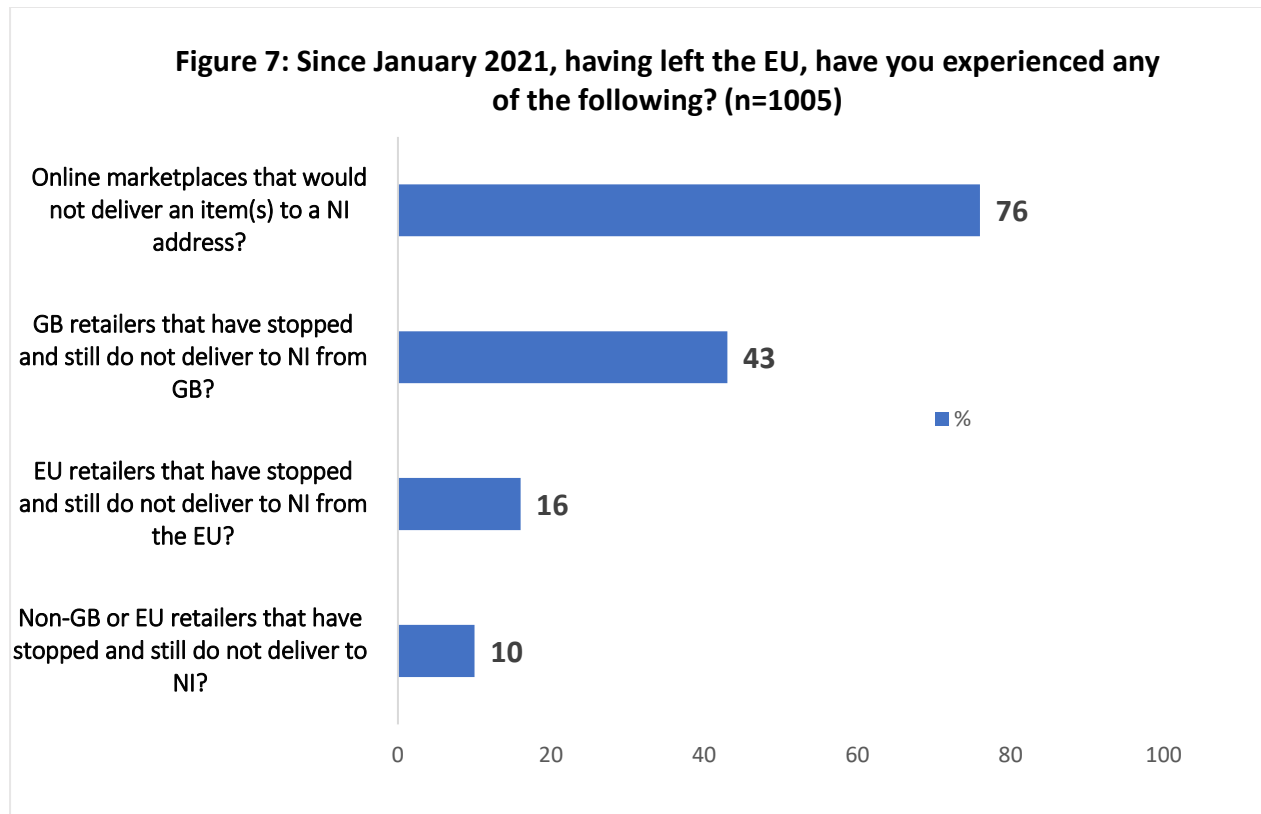
Other points in the buying process included: when adding an item to their shopping basket (32%); when browsing or clicking onto the item/stock availability check (28%); when first entering the retailer's website (e.g. popup or banner) (18%); and after purchasing the item (15%).



7. Have stopped and still do not deliver to NI

Consumers were asked in which marketplace they had experienced retailers not delivering to NI. 76% reported online marketplaces (such as Amazon, eBay, etc.), 43% reported non-delivery with GB retailers and 16% reported non-delivery with EU retailers. However, our data showed a small percentage of consumers may have attributed some retailers to the wrong locations.

The most common responses of non-delivery across all marketplaces is from Amazon, eBay and Etsy.



Online marketplaces not delivering to NI

The most common online marketplaces that consumers have experienced not delivering to NI included: Amazon (73%); eBay (49%); Etsy (19%).

GB Retailers not delivering to NI

The most commonly mentioned GB retailers who do not deliver to NI included: Amazon (27%); eBay (15%); Etsy (4%). Note some respondents will have incorrectly said that particular retailers are operating in specific locations.

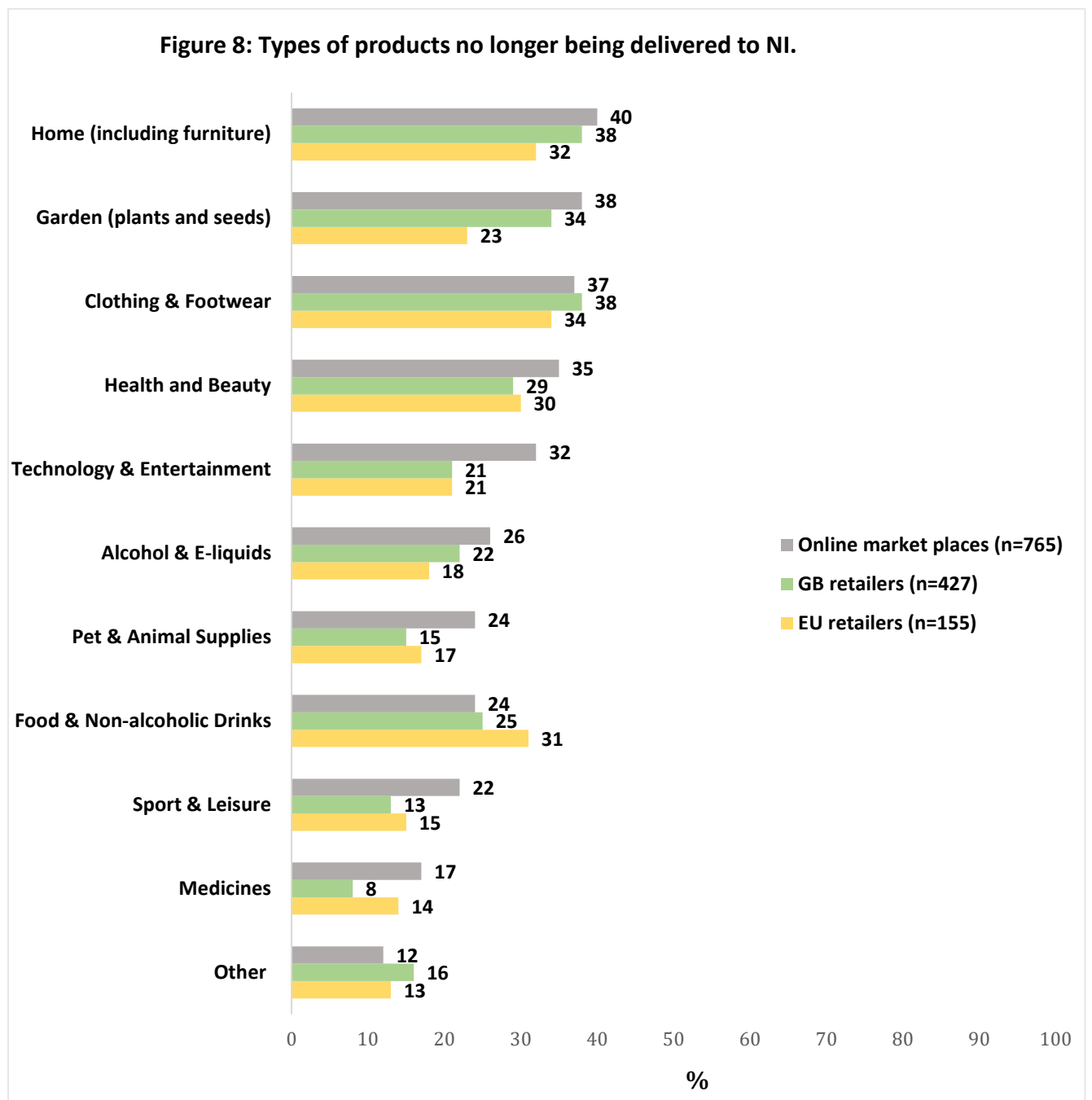
EU Retailers not delivering to NI

The EU retailers most commonly mentioned as not delivering to NI included: Amazon (36%); eBay (23%); Etsy (9%). Note some respondents will have incorrectly said that particular retailers are operating in specific locations.

8. Type of product not being delivered by online marketplaces and retailers

Consumers (who have experienced marketplaces and retailers not delivering to NI) were asked what types of products they could not receive to an NI address. Figure 8 shows a broad pattern of responses, with consumers stating the most common sectors not delivering include home (including furniture), garden (plants & seeds) and clothing and footwear.

There are some notable differences, with online marketplaces (38%) and GB retailers (34%) more likely to have stopped delivering plants and seeds compared with EU retailers (23%).



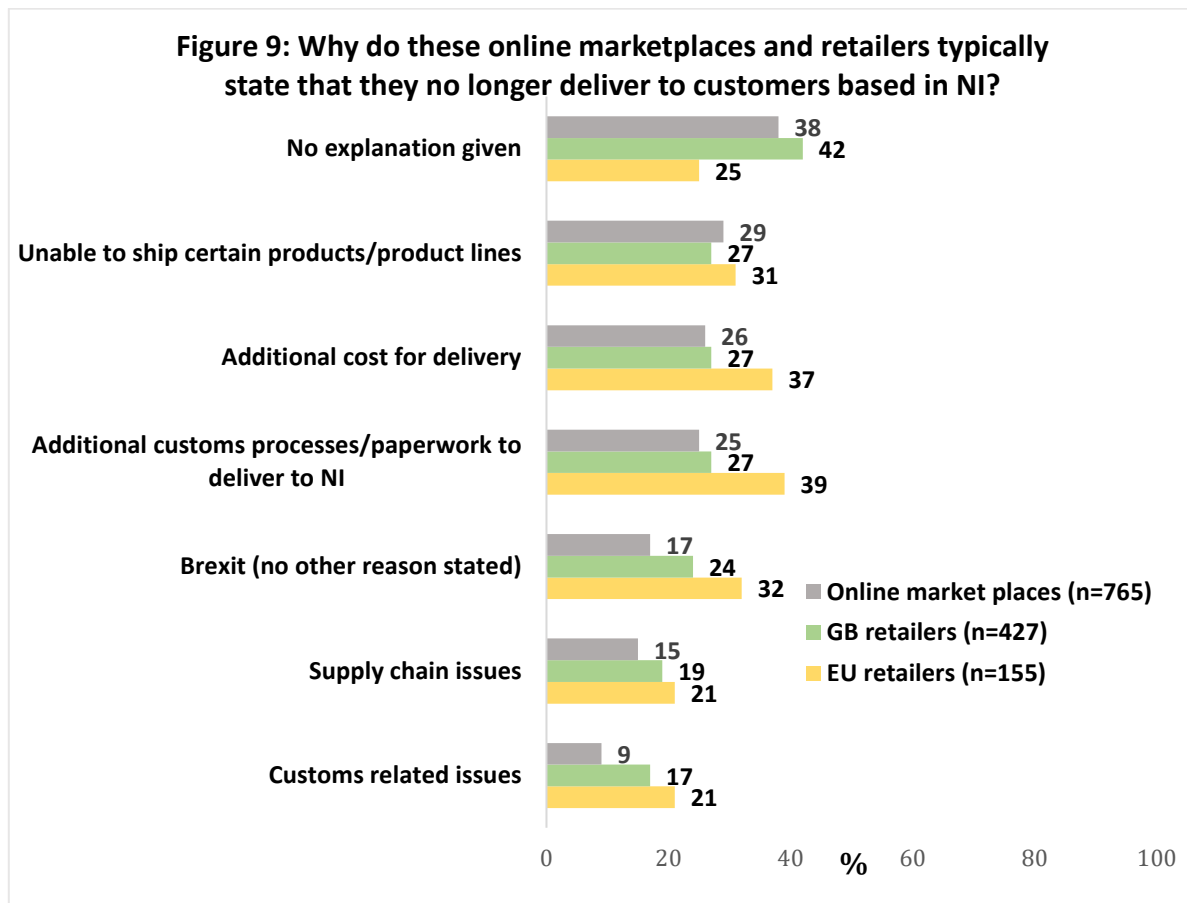
9. Reasons why online marketplaces and retailers do not deliver to NI

Consumers who experienced online marketplaces and retailers not delivering to an NI address were asked what reasons were given for not delivering.

Figure 9 shows consumers commonly stated that no explanation was given for not delivering to NI. The top reasons that online marketplaces would not deliver to NI included: no explanation given (38%); being unable to ship certain products/product lines (29%) and additional cost for delivery.

The top reasons that GB retailers would not deliver to NI included: no explanation given (42%); being unable to ship certain products/product lines (27%) and additional delivery costs (27%).

For EU retailers, the most common reasons for not delivering to NI included: additional customs processes/paperwork (39%); additional delivery costs (37%); and Brexit (32%).



10. Online marketplaces and retailers who will only deliver to NI under certain conditions

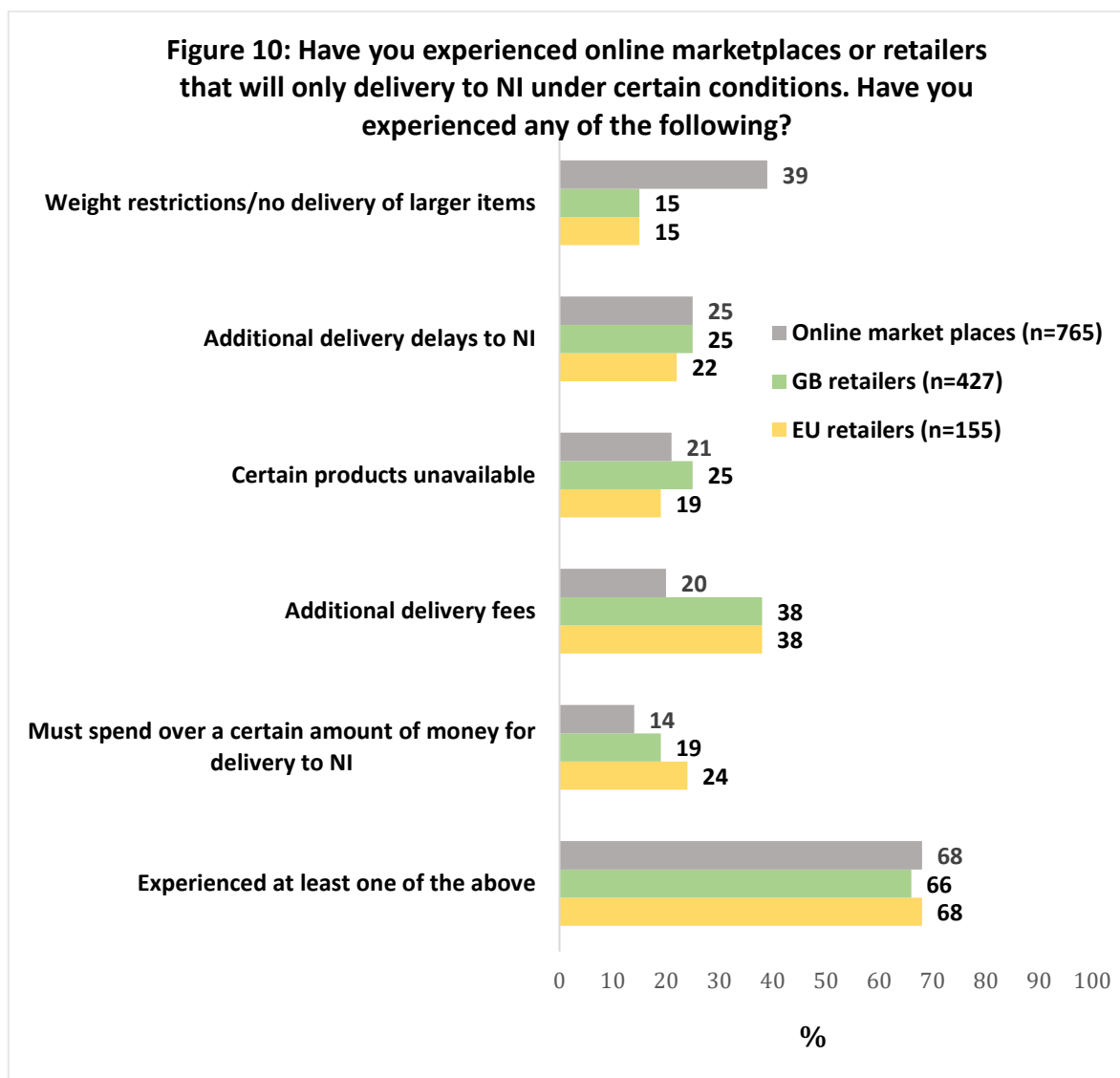
Consumers were asked if since January 2021 they have experienced online marketplaces and retailers who will only deliver to NI under certain conditions.

Figure 10 shows the most common conditions applied by online marketplaces included weight restrictions/non-delivery of larger items (39%), additional delivery delays to NI (25%) and certain products unavailable (21%).

For GB retailers the most common conditions applied included additional delivery fees (38%), additional delivery delays (25%) and certain products being unavailable (25%).

For EU retailers, the most common conditions that were applied included additional delivery fees (38%), consumers having to spend over a certain amount (24%) and additional delivery delays (22%) were most common.

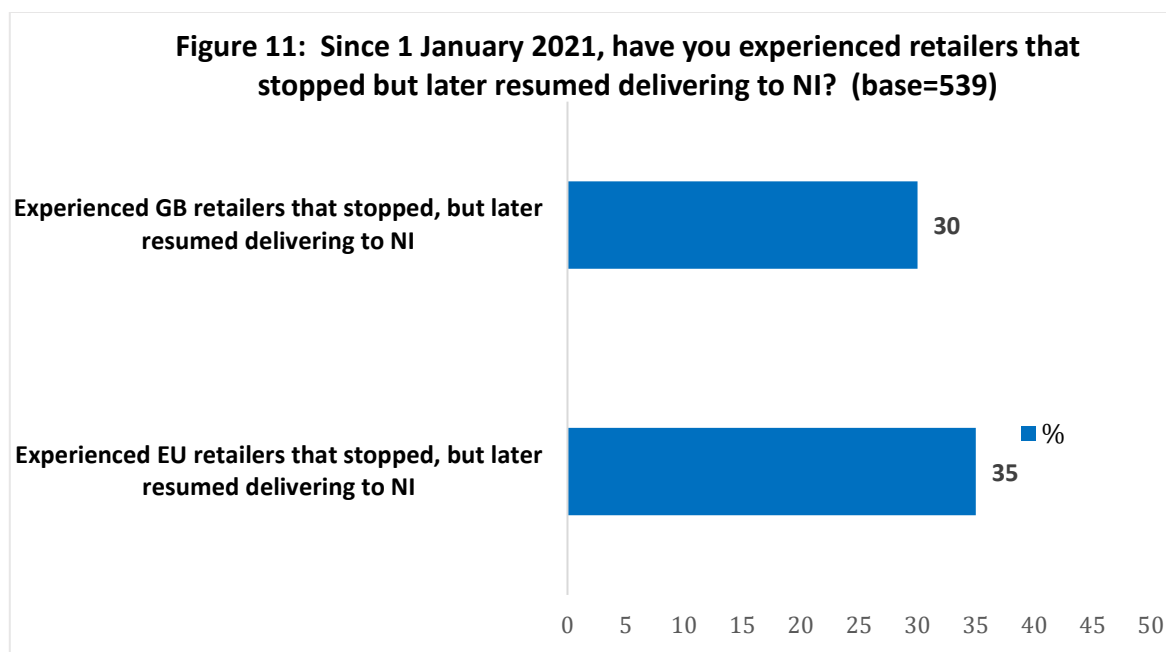
Regardless of online marketplace or location of retailer, most consumers who had experienced an issue with deliveries to NI said they had experienced at least one of the delivery conditions listed in Figure 10 (online marketplaces, 68%; GB retailers, 66%; EU retailers, 68%).



Retailers who stopped but later resumed delivering to NI

11. Retailers who stopped but later resumed delivering to NI

Consumers were asked if they had experienced retailers that stopped but later resumed delivering to NI, since January 2021. Figure 11 shows that this experience was consistent for those who had issues with GB retailers (30%) and with EU (35%) retailers.



GB retailers who had stopped but later resumed delivering to NI

Consumers listed a variety of GB retailers who they said stopped but later resumed delivering to NI, the most common of which included: Amazon (29%); eBay (21%); John Lewis (8%); Etsy (6%); and ASDA (4%). Note some respondents will have incorrectly said that particular retailers are operating in specific locations.

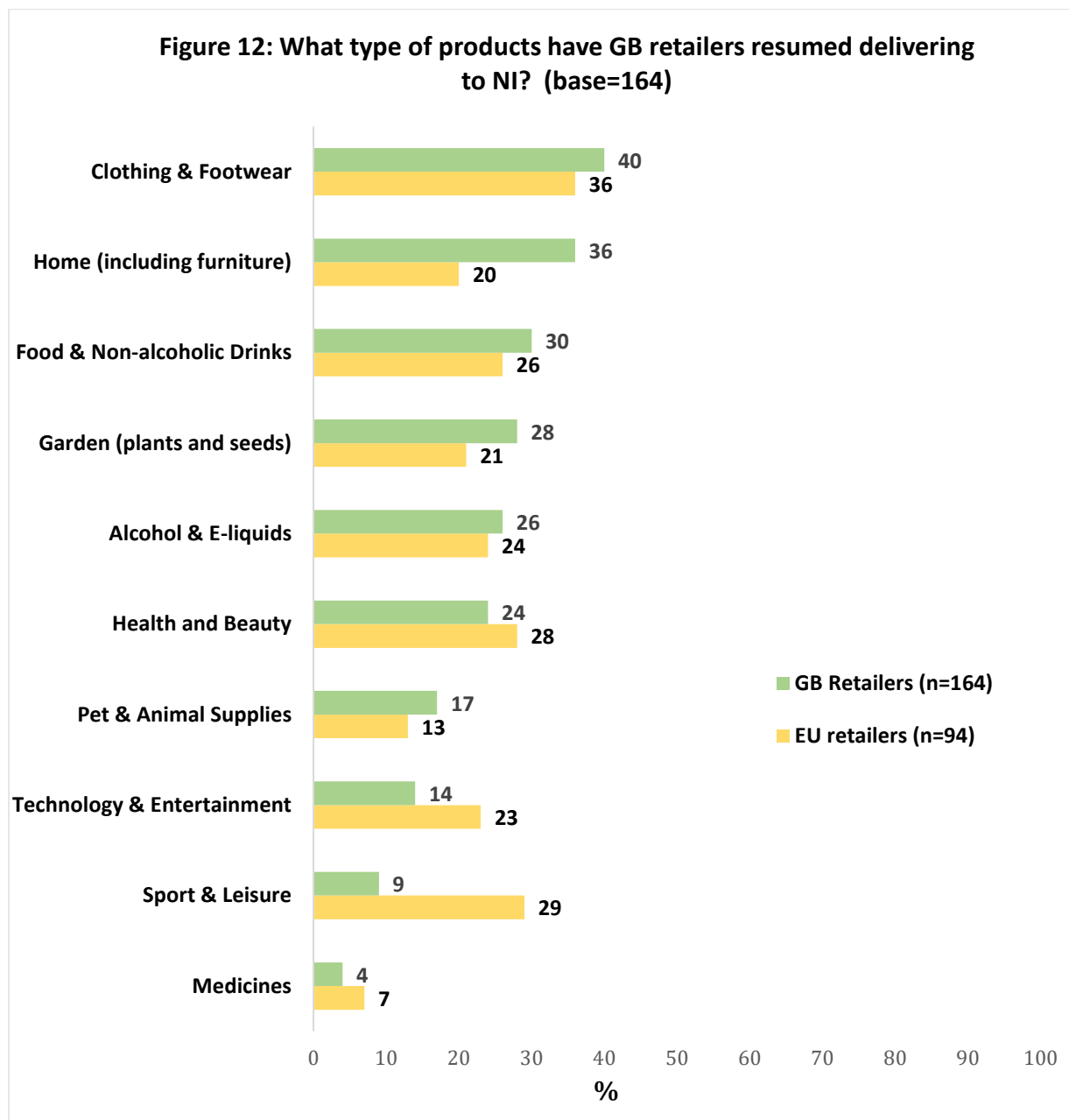
EU retailers who had stopped but later resumed delivering to NI

The most common EU retailers that consumers said stopped but later resumed delivering to NI included: Amazon (14%); eBay (12%); Tesco (6%); Etsy (5%); and Next (3%). Note some respondents will have incorrectly said that particular retailers are operating in specific locations.

12. Types of products retailers stopped then resumed delivering

Consumers who have experienced retailers who stopped but later resumed delivering to NI, were asked to say what types of products these retailers resumed delivering.

Figure 12 shows the most common products included: clothing and footwear (GB retailers, 40%: EU retailers, 36%); home products (GB retailers, 36%: EU retailers, 20%); and food and non-alcoholic drinks (GB retailers, 30%: EU retailers, 26%).

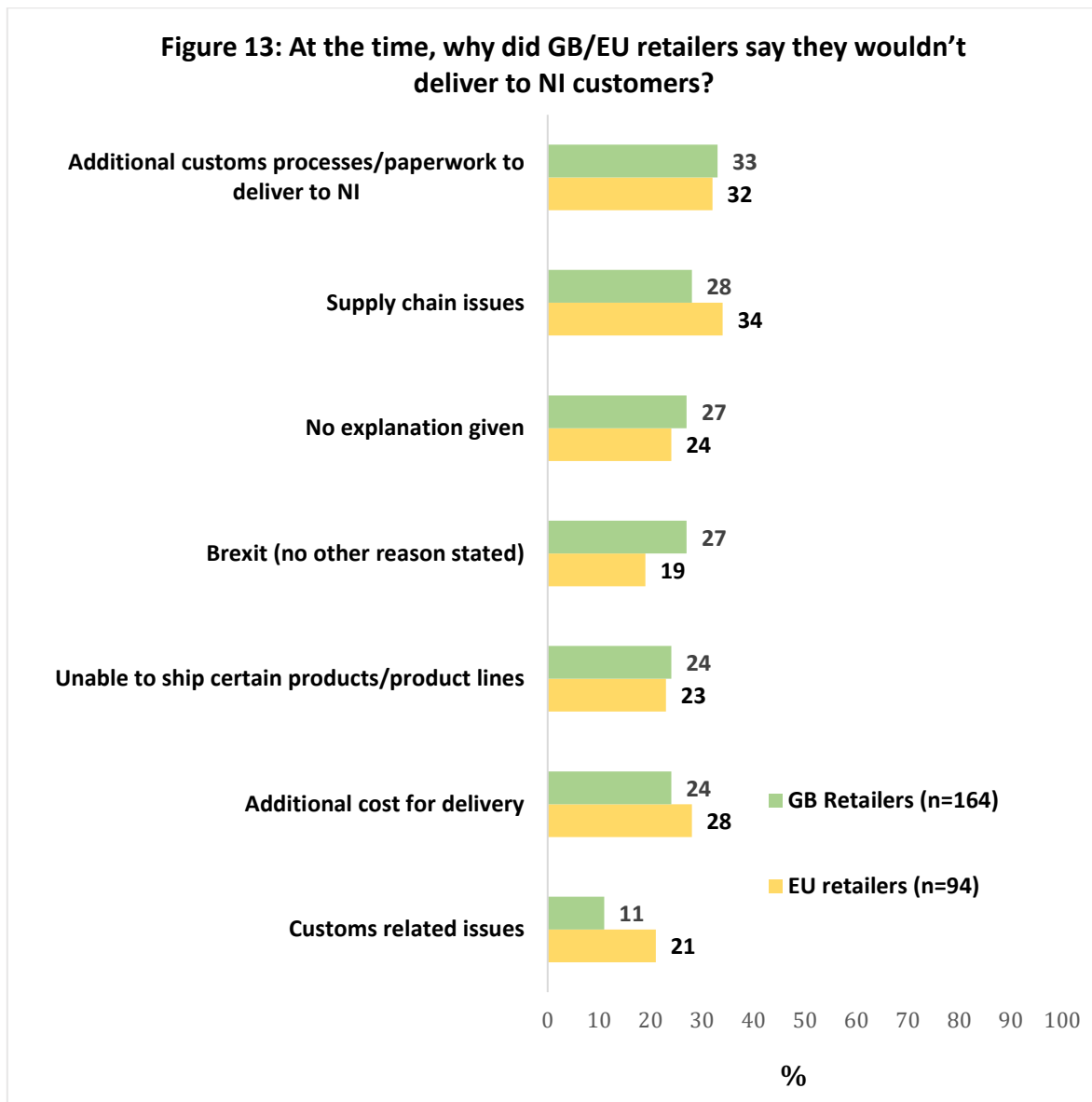


13. Reasons why retailers stopped (before later resuming) delivering to NI

Consumers who experienced retailers stopping deliveries to NI but later resuming deliveries were asked what reasons retailers gave at the time for stopping deliveries.

Figure 13 shows the most common reasons why GB retailers stopped but later resumed deliveries included additional customs processes/paperwork to deliver to NI (33%) and supply chain issues (28%).

The most common reasons listed by consumers for EU retailers stopping but later resuming deliveries to NI were supply chain issues (34%) and additional customs processes/paperwork to deliver to NI (32%).

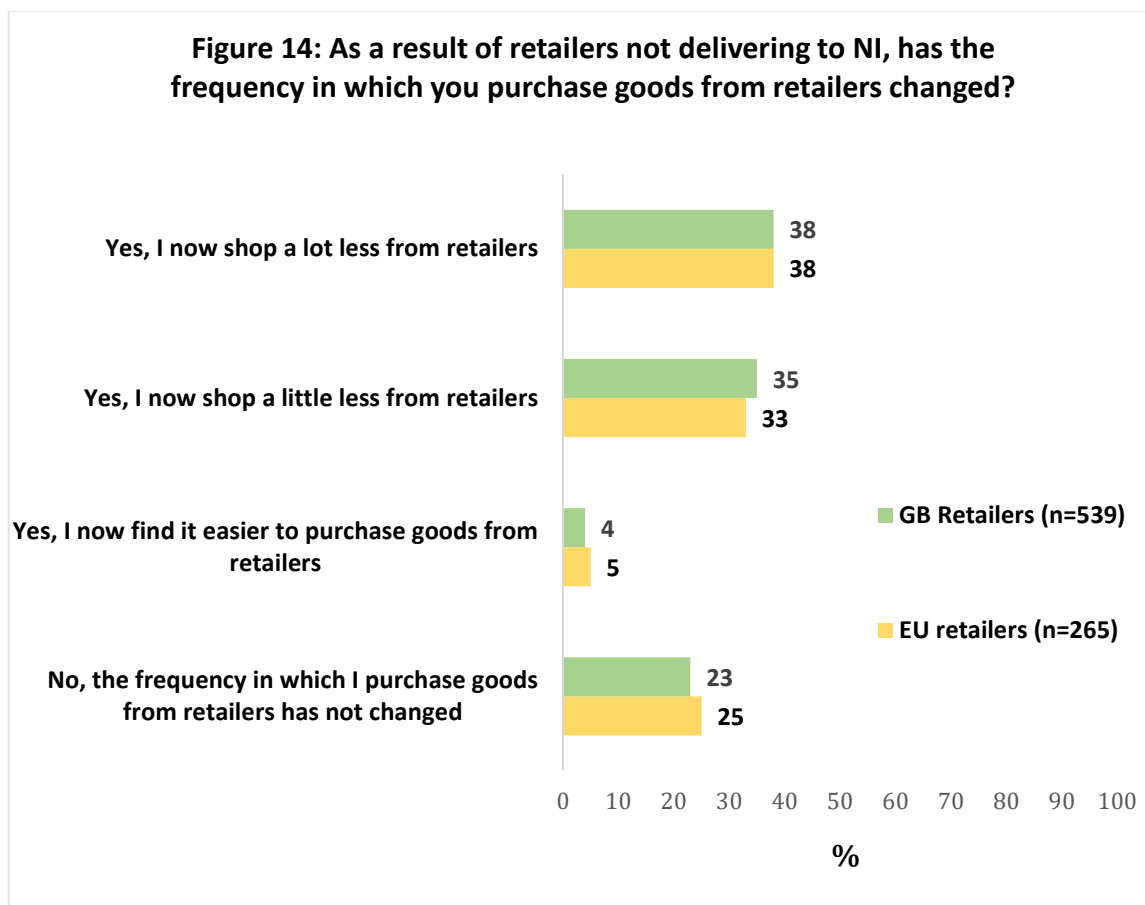


Impact of GB/EU retailers not delivering to NI

Consumers who have experienced non-delivery with GB and EU retailers were asked if not delivering to NI has impacted the frequency with which they buy goods.

Figure 14 shows that most (73%) of those who have experienced difficulties with GB retailers delivering to NI said they now shop a lot less (38%) or a little less (35%) from GB retailers.

A similar pattern of responses can be seen for EU retailers with 71% saying they now shop a lot less (38%) or a little less (33%) from EU retailers.



Conclusion

The purpose of this research report is to understand the experiences of NI consumers in relation to retailers in GB, the EU and online marketplace retailers, not delivering to NI, and provide insight into the issues they are facing.

Since January 2021, most consumers in NI have experienced some difficulty receiving goods to their address in NI. Although GB retailers have been the main concern, a number of consumers have also experienced difficulty with EU retailers.

- Almost nine out of ten (86%) consumers shopping online have found that items they were looking for could not be delivered to NI, with consumers most likely to find this to be the case when trying to check out/entering their NI address (67%).
- Most NI consumers shopping online experienced online marketplaces that would not deliver to NI, with Amazon, eBay and Etsy being the online marketplaces where consumers have been most likely to have experienced this problem.
- The issue of non-delivery to NI is consistent across products such as home furnishings, garden products, clothing and footwear and beauty products. In a significant number of cases, online marketplaces did not provide consumers with an explanation of why items could not be delivered to NI, with most consumers who shop online saying online marketplaces apply certain conditions (such as weight restrictions or non-delivery delivery of larger items) for deliveries to NI. The consumer experience of GB and EU retailers is consistent with what consumers have experienced with online marketplaces, with most stating that no explanation was provided for not delivering to them.
- Consumers reported online marketplaces, GB retailers and EU retailers were also unable to ship certain products and/or product lines to NI, or that they were charged additional delivery costs for shipping to an NI address.
- A number of consumers who have faced difficulty with delivery to NI state they were subject to certain conditions before an item can be delivered, such as weight restrictions, delivery delays or certain products being unavailable for delivery to NI. There was also confusion among consumers around where items were being shipped from, with Amazon, Etsy and other online marketplaces listed as shipping items from GB, EU and other locations.
- With a number of retailers selling through online marketplaces, having numerous branches or using local distribution hubs for selling to NI, this research concluded consumers found it difficult to understand where a product may originate from.

This research suggests most NI consumers have experienced delivery difficulties since EU Exit, and these difficulties are consistent regardless of whether they are receiving goods from GB retailers, EU retailers or online marketplaces. Regardless of the retailer location, the most significant problems are particular product lines being unavailable or being faced with certain conditions to enable delivery to NI.



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