



GUIDE 14

**Purchase information on goods
and services intended for
consumers**

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Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form the specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

Draft Guides adopted by the responsible Committee or Group are circulated to national bodies for voting. Publication as a Guide requires approval by at least 75 % of the national bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO and IEC shall not be held responsible for identifying any or all such patent rights.

ISO/IEC Guide 14 was prepared by the ISO Committee on consumer policy (COPOLCO).

This second edition cancels and replaces the first edition (ISO/IEC Guide 14:1977), which has been technically revised.

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Introduction

This Guide is one of several on aspects of consumer information. Its primary purpose is to advise those responsible for drafting national or International Standards as to what information prospective purchasers (whether of products or services) require and expect. It may also assist those who write purchase information, as well as enforcement authorities.

This Guide is relevant to all methods by which products and services are offered to consumers, including distance selling and sales by electronic media.

Information for consumers is a vital part of any product or service. Improving the quality of information increases consumers' ability to make a reasoned choice at the point of purchase. It helps to minimize risk of incorrect or inappropriate purchases or contracts. Consumer uncertainties are reduced and consumer satisfaction is increased. Those who supply a high standard of consumer information enhance their commercial reputation, and save time and money by reducing enquiries and complaints.

This Guide is concerned with those instances where the information is based in general on standards approved or recognized by ISO, IEC and national or regional standards bodies.

There is considerable scope for further standardization in the field of consumer information in terms of individual products and services, and even more so for groups of products and services. The material in Annex A illustrates how individual and vertical standards might be related in a consistent and systematic manner to horizontal standards for groups of products or services, with both types of standard employing the principles set out in this Guide.

Purchase information on goods and services intended for consumers

1 Scope

This Guide is applicable to the provision of information concerning products and services before purchase. It outlines general principles and recommendations for contents, methods, formats and design such that the information will enable consumers to compare and choose products or services. Furthermore, the Guide recommends general rules for the creation and implementation of purchase information systems and purchase information bodies.

It is addressed to the following:

- committees preparing standards for consumer products or services;
- product designers, manufacturers, technical writers or others engaged in the work of drafting such information, and, in particular, those who are members of purchase information bodies;
- other bodies such as enforcement agencies or consumer ombudsmen.

This Guide does not deal with conformity assessment or instructions for use. It does not give detailed guidance on information that is provided verbally or electronically.

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1

product

manufactured article intended for a customer

2.2

service

result of activities between a supplier and a client, and the internal activities carried out by the supplier to meet the requirements of the client

2.3

purchase information

information which will allow informed choice before the purchase of a product or a service

2.4

marking

symbols, pictograms, warnings, logos or inscriptions on the product to identify its type, which may also include short textual messages

2.5

purchase information system

system designed to inform consumers about products or services

2.6

purchase information scheme

rules or other formal arrangement in a purchase information system

2.7

purchase information body

duly constituted organization responsible for the surveillance and management of a purchase information system according to the rules of that system

2.8

instructions for use

information provided by the producer of a product or service to the user, containing all the necessary provisions to convey the actions to be performed for the safe and efficient use of the product or service

2.9

label

item, attached to a product, which displays information related to one or more characteristic(s) of the product

2.10

information material

material produced in order to convey information to prospective purchasers of a product or service

2.11

harm

physical injury or damage to the health of people or damage to property or the environment

[ISO/IEC Guide 51:1999]

2.12

hazard

potential source of harm

NOTE The term hazard can be qualified in order to define its origin or the nature of the expected harm (e.g. electric shock hazard, crushing hazard, cutting hazard, toxic hazard, fire hazard, drowning hazard).

[ISO/IEC Guide 51:1999]

2.13

risk

combination of the probability of occurrence of harm and the severity of that harm

[ISO/IEC Guide 51:1999]

2.14

residual risk

risk remaining after protective measures have been taken

2.15

protective measure

means used to reduce risk

EXAMPLE Risk reduction by inherent safety, protective devices, personal instructions (such as information for use and installation) and training.

2.16

supplier

person or organization supplying a product or providing a service

3 Principles for conveying information

3.1 General

This Guide provides only a brief description of the three most commonly used methods of conveying information to consumers at the time of purchase: by written or printed means, electronic means and verbal means. However a number of common principles apply to all methods of communicating information, as follows:

- information should be simple, accurate, up to date and understandable;
- the purchaser should, at all times, be given information in a language that he/she understands;
- product-/service-specific terminology should be explained;
- use of terminology and language should be unambiguous;
- pictures, diagrams, symbols, scales and tables can be effective means for conveying consumer information, but their message should be unambiguous (see 5.3);
- consumer information should be clearly distinguishable from that intended to promote the product.

Depending on the product characteristics, consumer information may be on the product itself, on packaging, in accompanying material, or in any combination of these forms.

For consumers who require more information about a particular product or service before making a decision to purchase or enter into a contract, the means to obtain it should be made clear.

3.2 Written and printed information

The use of typographies and colours can be an effective means of distinguishing consumer information from promotional material. Lettering should be in a size that can be easily read at the time of purchase and as specified in the appropriate national or International Standard.

Existing purchase information schemes often combine two methods of conveying information: first, attaching to the product a condensed statement which deals with a number of fundamental points; and secondly, accompanying the product with more wide-ranging information in catalogues, leaflets or other information material. Complete consumer information depends on the ability of consumers to receive and use both types of information. Each part should therefore be meaningful in its own right and should also be capable of correlation with the other.

The location, nature and content of the available consumer information should be clearly referred to on the first page of any document accompanying the product or service. If relevant, a picture of the product should be available.

Specific information on complaints and redress should be incorporated into any purchase contract. There should also be information on what regulation, if any, provides the guidance for complaints and redress.

3.3 Electronic information

When using electronic information for purchase, information should be on the first page.

Particular attention should be given to the provision of on-line information on products and services. This method of conveying information offers purchasers easy access to extensive amounts of data. It may include interactive purchaser information, as well as combinations of purchaser information and methods of electronic payment. An efficient and advanced use of the medium is purchase information provided in the form of checklists used as guidance documents by clients and consultants.

3.4 Verbal information

Verbal information is, in principle, a medium used to support the relationship between those who sell and those who purchase products and services. It provides the means for consumers to obtain an increased understanding of what is available to be purchased. If information is to be provided verbally, it should be given in a language understandable to the purchaser, and in a manner that respects the consumer's privacy.

Checklists of the type of information to be provided during verbal exchanges of information can prove of value to both parties.

4 Principles for provision of purchase information

4.1 General

Objective information should be readily available before a decision is taken to make a purchase or to enter a contract. It should be understandable to the consumer. It should enable the consumer to assess the complete product or service in relation to his/her individual needs.

Information concerning the manufacturer/supplier of the product or service is essential for purchasers who may later wish to trace its origins in order to seek further information, assistance or redress.

The degree of interest shown by potential purchasers will vary, and it may on occasion be useful for purchase information systems to encourage the provision of information on two levels.

The first level of information is intended for those seeking a minimum amount of data on the key characteristics of the product or service. It has the minimum contents set out below. The second level is for those wishing to know more details concerning, for example, technical matters such as minimum contents (covered by first level), specific function, or limitations of the service or product.

4.2 Minimum contents

Normally the minimum contents of purchase information should characterize the essential features of the product or service. It should be provided in the official language(s) of the country in which the product or service is offered for sale.

It should include the following, where relevant:

- identification of the product or service;
- country or countries where the product was manufactured or assembled;
- name and full address of the manufacturer or supplier;
- conditions and any limitations for use;
- essential performance characteristics;
- product characteristics such as contents, performance, raw materials or size;
- maintenance and cleaning information;
- information about spare or replacement parts and how to obtain them;
- information about additional parts that are available for certain environments, e.g. guard devices;
- safety concerns, including known risks and hazards;

- warranties and guarantees;
- complaints-handling procedure(s);
- residual risk;
- need for special (professional) installation;
- total price of the product, including any additional costs such as periodic fees, service costs, subscriptions, connection costs, tax;
- consumption of resources, e.g. energy required for use;
- environmental issues (see IEC Guide 109 and ISO Guide 64).

4.3 Presentation

Purchase information should be

- comprehensive,
- relevant to the particular product or service,
- accurate, up to date and verifiable in accordance with objective data and normative requirements,
- clearly separate from advertising and promotional material, and
- of minimum content which is comprehensive, and categorized into what is more/less important;

Appropriate supplementary guidance literature should be referenced.

Purchase information should not be

- confusing or deceptive, or
- misleading.

4.4 Contracts

In the case of formal contracts, all conditions including those for entering or cancelling a contract should be stated, and reference made to relevant national consumer protection legislation or regulations.

This is particularly important if a consumer seeks redress or if contract cancellations entail additional costs and/or financial loss.

4.5 Objectivity of data

For the purpose of comparison, the provision of information should, where it exists, be based on standardized terms, objective data, normative documents, or on other commonly accepted agreements or practices. Those alternatively used agreements or practices should be accessible to all interested parties and should allow a reproducible check of the performance characteristics. Data on performance characteristics should thus be allowed comparison.

4.6 Use of references to standards or legislation

It is recommended that whenever information of a technical nature relating to the characteristics of a product is made known to the public, the definition of these characteristics and the method of verifying the information

should be based as far as possible on International Standards (ISO or IEC). If such standards are not available, national standards should be used. The only exception may be where official national or regional legislation or regulations apply.

Conformity to the relevant standard(s) should be presented in a way that allows the consumer to identify which characteristics of the product or service conform to the standard(s). The process of selecting and grouping together consumer-relevant characteristics and the underlying criteria can best be undertaken by a standards committee or another legal or private body representing all interested parties, such as a purchase information body (see Annex B).

5 Formats and design principles

5.1 General

Any measure taken to increase the recognition by the consumer of purchase information is helpful. Consumers' identification with, and confidence in, purchase information increases as a result of familiarity with common formats and design principles.

ISO/IEC Guide 37 provides additional guidance regarding principles and recommendations on the design and formulation of information for consumers.

5.2 Fundamental principles

For the purpose of easy perception, recognition and comparison, the provision of purchase information should remove or minimize consumer confusion. With respect to the essential characteristics of a product or service, the information should conform to the following recommendations.

- It should be provided by a variety of means, at different times, or at different levels of complexity or detail.
- It should be given in plain and commonly understood wording. If there are requirements or other regulations dealing with the provision of information in detail, they should be met. Data should be given in internationally standardized (SI) units and on a common basis (preferably International Standards) and referenced. Individual data should be shown in relation to the ruling market data, for example by giving an individual performance figure in relation to a range of other products or services.
- It should present complex technical, or service-related, information by means of a classification or rating system, or some other means of combining a number of single performance data in a simple manner.
- It should present a single product which forms part of a distinct product group or product "family" as part of that product group or service of which it is a member.

5.3 Use of diagrams, symbols and pictograms, scales and tables

Pictorial forms can be an important means of presenting information. They include

- graphical presentations, such as overviews created by putting data into tables, which are a helpful means of making a product or service more transparent, and
- diagrams, tables or graphs which relate the actual value of an individual performance characteristic to the market-relevant range of performances.

A single product or service which forms part of a closely related homogeneous group of products or services should be presented in the context of the group in order to make options and alternatives evident.

Where symbols and pictograms are used, they should have been objectively tested and independently shown to be understandable by prospective purchasers. Graphical symbols should conform to recognized standards,

for example ISO 7000, ISO 7001 or IEC 60417. In addition, symbols, pictograms and markings should be explained in the instructions for the use of the product. Pictograms alone should not be used to convey safety warnings. Further detailed guidance is given in ISO/IEC Guide 37.

5.4 Language, terminology and understandability

The formulation of purchase information should be based on easily understood and simple use of the language(s) of the country or countries where sale is intended. The use of technical terminology should be restricted to an absolute minimum.

Consideration should be given to the use of "focus testing" on a representative sample of prospective users to assure the understandability of user instructions.

5.5 Recognizability and uniformity

Attention should be given to the most appropriate location for the information.

To emphasize warning notices and any other information concerning safety, the use of larger or different typeface or other means of increasing conspicuousness is recommended. Attention is drawn to ISO/IEC Guide 37.

The typeface and size should be as clear and as large as practicable in order to ensure the greatest possible legibility for all potential purchasers, including those with disabilities or special needs.

When colour is used to convey information on safety, its choice should be in accordance with ISO 3864-1.

Uniformity in the appearance, format and sequencing of information content, in particular with regard to purchase information, is needed to assist consumer recognition and comprehension.

All information intended to be retained by the purchaser for future use should be in a form that will not deteriorate in normal use.

To the extent possible, the material should be photocopy-compatible to ensure that colours copy in black and white without loss of essential information.

Annex A (informative)

From provision of information in general to a coherent system of purchase information

The approach envisaged by this Guide suggests rules for the provision of information in general. The concept of purchase information can be developed further to establish a coherent and consistent system of rules for information on products and services. The value of an information system incorporating entire product or service types is indeed much greater than a correct but isolated single piece of information.

The creation of such a system (see Annexes B and C) may be based on standards, legal rules, rules set by private associations, etc. Coherence and consistency are key features to be considered. Three levels of action have proven to be helpful, as follows.

- a) **Level I:** General principles applicable for all schemes and initiatives. Such horizontal guidelines are to a large extent described in this Guide. They may be extended according to future needs.
- b) **Level II:** More specific principles relating to a certain product group (e.g. furniture) or service type (e.g. insurance services) may be developed by taking into account the general rules in Level I:
 - 1) definition of sufficiently homogeneous groups and subgroups for which a sector-specific approach can be established (see classification in Figure A.1);
 - 2) selection of essential characteristics of a service for primary information; definition of rating systems if there are complex matters;
 - 3) identification of the need for more in-depth information, which may be met in the form of secondary information;
 - 4) specification of standard terms and definitions; methods of determination and measurement;
 - 5) agreement on a uniform, adequate means of presenting primary information;
 - 6) further specifications according to need.
- c) **Level III:** Information schemes on individual products (e.g. beds and mattresses) or services (e.g. private liability insurance) based on the common rules provided in Level II:
 - 1) selection of essential performance characteristics for an individual product or service; determination of primary and secondary information;
 - 2) definition of performance characteristics; specification of means of measurement;
 - 3) specification of ways and formats for presentation of values, data, pictograms, etc.;
 - 4) reference to secondary information if necessary;
 - 5) further specifications according to need.

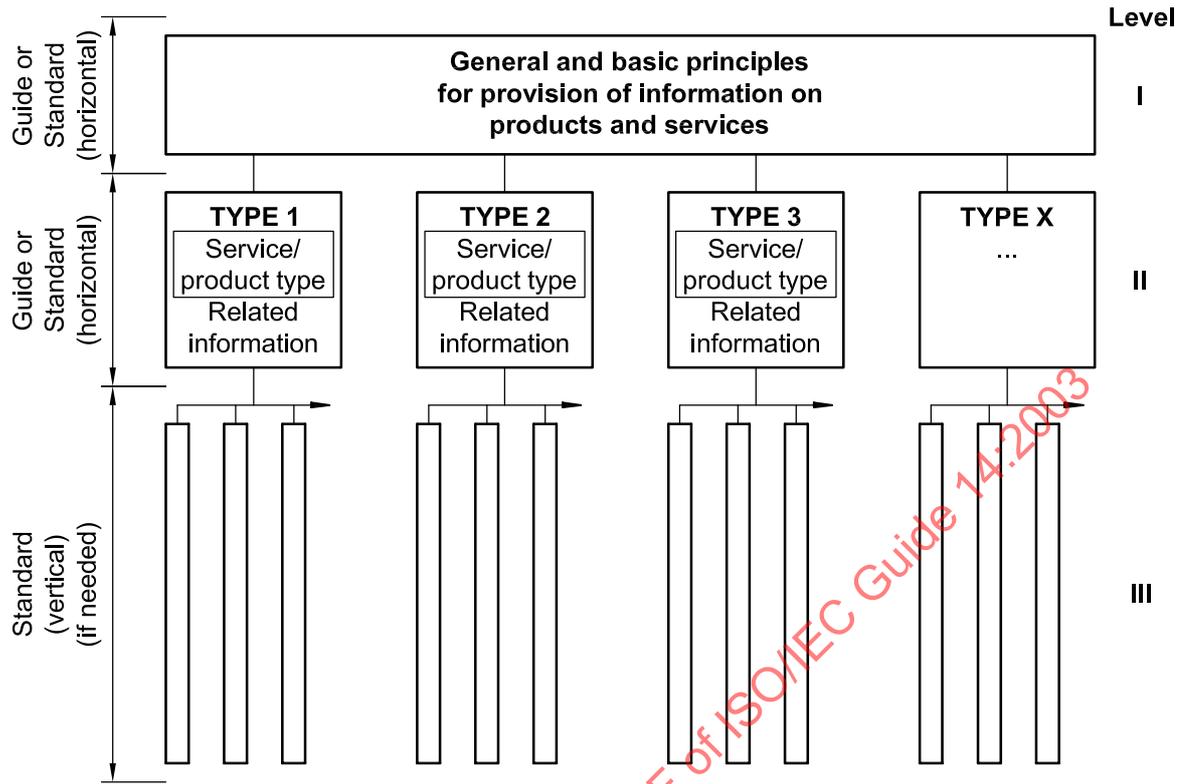


Figure A.1

Annex B (informative)

Purchase information bodies

A purchase information body is a duly constituted organization responsible for the surveillance and management of a purchase information system according to the rules of that system.

The recommendations in Clause 4 for achieving consumer-friendly purchase information apply equally to the context of purchase information systems. Additionally, where bodies are established, the following recommendations are given.

The purchase information body should

- be self-regulating and have admission and participation criteria,
- set down the rights and obligations of participants, and the sanctions that will be imposed for incorrect use of the purchase information system,
- establish a complaints procedure,
- seek to promote the availability of purchase and user information,
- produce and disseminate a written code of conduct for the operation of the purchase information system,
- make explicit to which part or aspects of the sector or profession the purchase information system applies,
- identify and clearly define those products or services to which the purchase information system applies,
- identify those markets to which the purchase information system applies,
- make the products or services to which the purchase information system applies easily identifiable by the prospective purchaser,
- ensure that the information provided is capable of quantification or measurement,
- lay down a measuring system for every product or service aspect that is included in the purchase information system,
- decide which product or service characteristics weigh most heavily in the purchase decision before determining what information is supplied,
- determine the method by which the information is communicated,
- select the types of information that are to be used,
- devise a means for reviewing and evaluating the performance of the purchase information system, and
- devise and execute a plan for communicating to customers the nature of the purchase information system.