Office for Product Safety & Standards

OPSS Product Safety and Consumers: Wave 3

BEIS Research Paper

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- A little over a half (53%) of the UK public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe – a decline of five percentage points from wave one and two (both 58%) as a result of increasing uncertainty.
- The general public's outlook remains largely unchanged in considering safety when purchasing a product compared to both previous waves. The safety of the product ranks 10th out of 16 factors that were presented to people who had bought products recently, with close to one in ten (8%) identifying it as a factor.
- As with previous waves, consideration of product safety varies across product type, increasing when purchasing baby products (30%) or toys (18%).
- A third (36%) of the UK public state that the government is most responsible for *setting* product safety requirements (36%) but a small minority feel the government is responsible for ensuring a product *meets* safety requirements (10%).
- Trust is lowest in UK governmental departments (30%) and local government (36%), with both seeing declines since wave one.
- The UK public has high levels of trust in consumer protection organisations (e.g. Citizens Advice, Which?), with eight in ten (77%) saying they consider them to be trustworthy in how they operate towards them personally.
- The qualitative research found that trust in a broad range of organisations has declined significantly in recent months. The Conservative government's Christmas parties during COVID-19 prompted distrust in the government amongst the younger age groups and exacerbated existing distrust amongst the older age groups.
- Aside from health organisations and professionals, many only trust a few organisations or news outlets and emphasised the importance of individual research and relying on their instincts.

Perceptions of the Office for Product Safety and Standards

- Over half (56%) of respondents report that they have at least heard of the OPSS, with 31% reporting that they know something about the OPSS. This is broadly comparable to awareness of BEIS (59%), and those who know something about BEIS (32%).
- A majority (52%) of those who are aware of OPSS say they trust the organisation. However, this is mostly driven by those who say it is trustworthy (45%), compared to very trustworthy (7%).

- Half of the respondents (50%) who are aware of OPSS report that their work is effective, compared to 14% who think it's not effective.
- The most common word associated with the OPSS is professional (25%), followed by impartial (21%), although among the offline population the most associated word is fair (40%).

Online purchasing

- Rates of online shopping have fallen from almost two-thirds (65%) to just under three-fifths (58%) of consumers reporting to have purchased something online in the last six months. This may be due to COVID-19 restrictions around in-store shopping being relaxed.
- Consumers are less aware of their consumer rights than before - half (51%) of consumers are aware of their consumer rights if a product purchased online is unsafe, down from 57% in wave two.
- Broadly, online retailers of a range of products (e.g. Argos) are the most likely to be considered a safe online retail environment (84%) while fewer view Amazon marketplace (49%) or other marketplaces (44%) as safe.
- Of people who have purchased from an online marketplace, there is a marked increase in the proportion thinking sellers are mainly responsible for ensuring safety (31%) and a fall in thinking manufacturers are mainly responsible (31%).
- Most qualitative participants were familiar with online marketplaces but had mixed experiences using them. Some online marketplaces felt more legitimate and 'safe' e.g. Etsy, whilst platforms such as Facebook Marketplace felt risky. Consequently, many reported avoiding buying 'high-risk' items such as toys or electronics that could be faulty or unsafe.
- Levels of concern about safety of a product from outside the EU/ UK on an online marketplace are consistent (65%) and older respondents aged 65 and over are the most likely to be concerned (75%).
- The qualitative research found that many are now taking substantiated steps to shop more sustainably and locally where possible, in efforts to support their local economy.

Second hand purchasing

- Nearly two thirds (65%) of the UK public identified at least one product they would be likely to buy second hand, unchanged from wave one.
- Clothes / clothing accessories (36%), furniture / furnishings (34%), and sports and leisure items (29%) are the most frequently cited items that the public would buy second hand.
- Those who would buy second hand more commonly say they would do this through offline means (85%) rather than online (77%).

- In line with wave one, the majority (79%) who would buy second hand agree that they would consider the safety of the product they are buying. A similar proportion (76%) agree that it is the seller's responsibility to ensure the product is safe, while just under half (49%) agree that they are aware of their consumer rights if a product they have bought is unsafe.
- Checking the reviews of the seller is the most commonly cited way of ascertaining whether a second hand product is safe (50%), followed by checking to see if the product looks used (42%).
- A small minority who would buy second hand would not do anything to determine whether the product is safe (8%).

Experiences of safety issues

- One in ten respondents who bought a product within the last 6 months reported experiencing a safety issue of some kind.
- Those who bought baby monitors (16%), extractor fans (14%) and musical instruments (14%) were the most likely to have a safety issue.
- Issues with sports and leisure items were reported as the most serious by respondents (5.5 out of 10).
- Distress/ increased stress is the most common impact from a safety issue with a product (19%), with the exception of 'none of the above' (56%).
- Of those who experienced physical harm (17%) due to a safety issue with a product, 32% needed some form of first aid and 17% needed urgent medical attention.
- Out of respondents who had a safety issue with a product, the majority (71%) took some form of action as a result. The most common action is to return the item for a refund/ exchange (23%).

Perceptions and experiences of product recalls

- Awareness of product recalls over the last two years is falling (58% W1, 53% W2, 50% W3), with young people maintaining the strongest awareness of product recalls.
- Consistent with previous waves, most of the UK public would prefer to be contacted directly about a product recall for something they own – either via the manufacturer (57%) or seller (52%).
- Despite lower awareness in general, the proportion reporting a product they own having been recalled is consistent at one in ten (11%).
- White goods remain the most common product recalled (29%), but this has significantly declined compared to wave one (44%). There has been a marked rise in the proportion reporting recalls for electrical appliances (17% W1, 21% W3).

- Although direct contact is the preferred method of learning about a recall, the proportion saying they found out about their recall from the seller has fallen (27% W2, 18% W3). The proportion finding out about recalls from the media continues to grow (27% W1, 32% W2, 36% W3).
- Despite the changes in type of product recalled, and source of awareness, the actions taken because of a recall remain consistent with previous waves. The most common activity is still to return/ exchange the product (31%).

Perceptions and experiences of product registration

- A third of those who purchase an eligible product register it (32%) and uptake remains highest for white goods (62%).
- Registration for electrical appliances (40%) and sports items (20%) has increased significantly since wave two.
- The most common reason for registering a product is still to validate a warranty (68%).
- The majority of those who register their products do so online (72%), with two fifths (44%) using manufacturers websites and a quarter (26%) using retailer websites.
- Almost all of those who registered a product found the product registration process to be easy (91%). The proportion who report that registering by post was easy has gradually decreased over the waves leading to a significant difference between waves one (94%) and three (78%).
- The most common reason to not register an eligible product that they did not know they could (39%). The proportion stating they did not want to/ did not think it was necessary decreased since wave two (34%, down from 37% in W2).
- Those that do not think registration is necessary continue to say there is no benefit to registration (42%).
- In wave three there is an increase in the proportion stating that they didn't understand why they should, with one fifth (20%) identifying this compared to 15% in wave two.
- The appetite for clearer guidance remains consistent with wave two – just over half of those who did not register their product in wave three say that clearer guidance would make them more likely to register a product in the future (56%).
- The qualitative research found that registration was attractive based on the type of product and its overall value. Most weigh up the cost and time it would take to repair the item with the original cost and compare this with replacing the product.
- Automatic registration was generally felt to be appealing but some were concerned about how their data might be used.

Background

The Department for Business, Energy, and Industrial Strategy (BEIS) has policy responsibility for consumer product safety. To that end, the Office for Product Safety and Standards (OPSS) was established by BEIS in January 2018.

As the national regulator for all consumer products (excluding vehicles, medicines and food) and for legal metrology, OPSS delivers consumer protection and drives business growth and confidence, as well as developing businesses' understanding of their obligations.

As OPSS's Strengthening National Capacity for Product Safety (2018[1]) highlights: with increasing innovation in the ever growing global marketplace, products are more easily accessible than ever. Accordingly, regulation needs to be constantly adapting in order to keep pace with these changes.

Researching consumer attitudes and awareness is key in developing reactive regulation. This survey provides insight on consumer awareness and behaviour, alongside attitudes to policy areas and awareness of policy changes. It also investigates how vulnerable consumers' experiences could differ to identify how vulnerable consumers could be better assisted in matters of product safety. This study works to inform and evidence OPSS's objectives outlined in the Office's National Capacity for Product Safety Strategy[2].

[1] OPSS (2018) Strengthening national capacity for product safety: Strategy 2018-2020 https://www.gov.uk/government/publications/strengthening-national-capacity-for-product-safety-strategy-2018-2020
[2] Ibid.

Aims and objectives

This tracker seeks to build on a body of existing research and evidence in this area, including the Consumer Attitudes to Product Safety study.[3] It aims to benchmark and measure various key objectives of OPSS as well as filling evidence gaps for various policy topics.

Key objectives of this research include:

- To understand and monitor consumers' awareness and attitudes to a range of product safety issues
- To gain new attitudinal insight on OPSS policy areas
- To increase understanding of vulnerabilities and vulnerable groups

To support these objectives, OPSS commissioned YouGov to understand and monitor consumers' awareness and attitudes of product safety, their attitudes towards the product safety regulatory system, and understanding of different organisations concerned with product safety.

This report presents the findings from the third wave of tracking, including comparisons against wave one and two where applicable. The report also includes an exploration of key topical policy areas including button and coin batteries, UVC and air cleaners, and the right to repair.

The study represents one of the largest of its type and provides invaluable insight into thousands of experiences of how people perceive the safety of products and handle any safety issues they face.

Approach

The findings are based upon a large-scale representative sample of 10,187 people from across the United Kingdom (UK) collected through online research methods. Fieldwork was carried out between the 23rd November to 14th December 2021. A supporting survey of 251 people who are very low or non-internet users was conducted via telephone between the 25th November 2021 to 5th January 2022.

After the close of the online survey, four text-based online focus groups were conducted with survey participants. Groups were split by age (18 to 34, 35 to 60, 61+) and included a mix of genders, ethnicities, social grades, and locations. There were 8-10 participants per group, each group lasted 90 minutes. Participants were asked to respond to an open ended question as part of the recruitment criteria to ensure that participants were articulate enough to participate in text based research. Participants were incentivised via retail voucher, in line with the MRS Code of Conduct.

Where appropriate, comparisons have been made with data from wave one and two.

- The wave one online survey sample size was 10,230 UK adults. Fieldwork was undertaken between 17th and 30th November 2020.

[3] OPSS (October 2020), Consumer attitudes to product safety. https://www.gov.uk/government/publications/consumer-attitudes-to-product-safety Accessed January 2021

Wave one offline survey sample size was 512 UK adults. Fieldwork was undertaken between 23rd November and 12th December 2020.

- The wave two online survey sample size was 10,296 UK adults. Fieldwork was undertaken between 17th May and 15th June 2021.

  The wave two offline survey sample size was 251 UK adults. Fieldwork was undertaken between 3rd to 28th June 2021

Unless otherwise stated, figures and data presented are from the online survey. Where two or more groups are discussed, only statistically significant differences to the 95% confidence interval are mentioned. Significance testing is not applied for figures based on fewer than 50 respondents. Where included, figures based on fewer than 50 respondents are noted and should be treated with caution. Figures based on fewer than 30 respondents are not included or reported upon. All analysis is conducted to two decimal places. Figures in charts or images may not sum to 100% due to rounding or due to the question allowing multiple selections.

Some demographic findings are highlighted in blue boxes. These boxes include demographic analysis which particularly involved minority groups.

Findings from the low/ non-internet users are noted as “the offline survey” or “offline adults”. Due to the difference in methodology from the online survey, no findings are statistically significant. Findings are only presented where offline adults report disparate behaviours or notable divergences when compared to the online survey data. These are presented as indicative comparisons only and are not statistically comparable.

Throughout the online survey, offline survey, and focus groups, participants were presented with examples of organisations or products, definitions of terms, and visual stimuli where appropriate.

Findings from the qualitative research are noted as “the qualitative research” or “focus groups”. Due to the nature of the qualitative research, no findings are statistically significant.

Full methodological details and the full survey materials can be found in the accompanying technical report.

Perceptions of safety

Key findings

- A little over a half (53%) of the UK public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe – a decline of five percentage points from wave one and two (both 58%) as a result of increasing uncertainty.
- The general public's outlook remains largely unchanged in considering safety when purchasing a product compared to both previous waves. The safety of the product ranks 10th out of 16 factors that were presented to people who had bought products recently, with close to one in ten (8%) identifying it as a factor.
- As with previous waves, consideration of product safety varies across product type, increasing when purchasing baby products (30%) or toys (18%).
- A third (36%) of the UK public state that the government is most responsible for *setting* product safety requirements (36%) but a small minority feel the government is responsible for ensuring a product *meets* safety requirements (10%).
- Trust is lowest in UK governmental departments (30%) and local government (36%), with both seeing declines since wave one.
- The UK public has high levels of trust in consumer protection organisations (e.g. Citizens Advice, Which?), with eight in ten (77%) saying they consider them to be trustworthy in how they operate towards them personally.
- The qualitative research found that trust in a broad range of organisations has declined significantly in recent months. The Conservative government's Christmas parties during Covid-19 prompted distrust in the government amongst the younger age groups and exacerbated existing distrust amongst the older age groups.
- Aside from health organisations and professionals, many only trust a few organisations or news outlets and emphasised the importance of individual research and relying on their instincts.

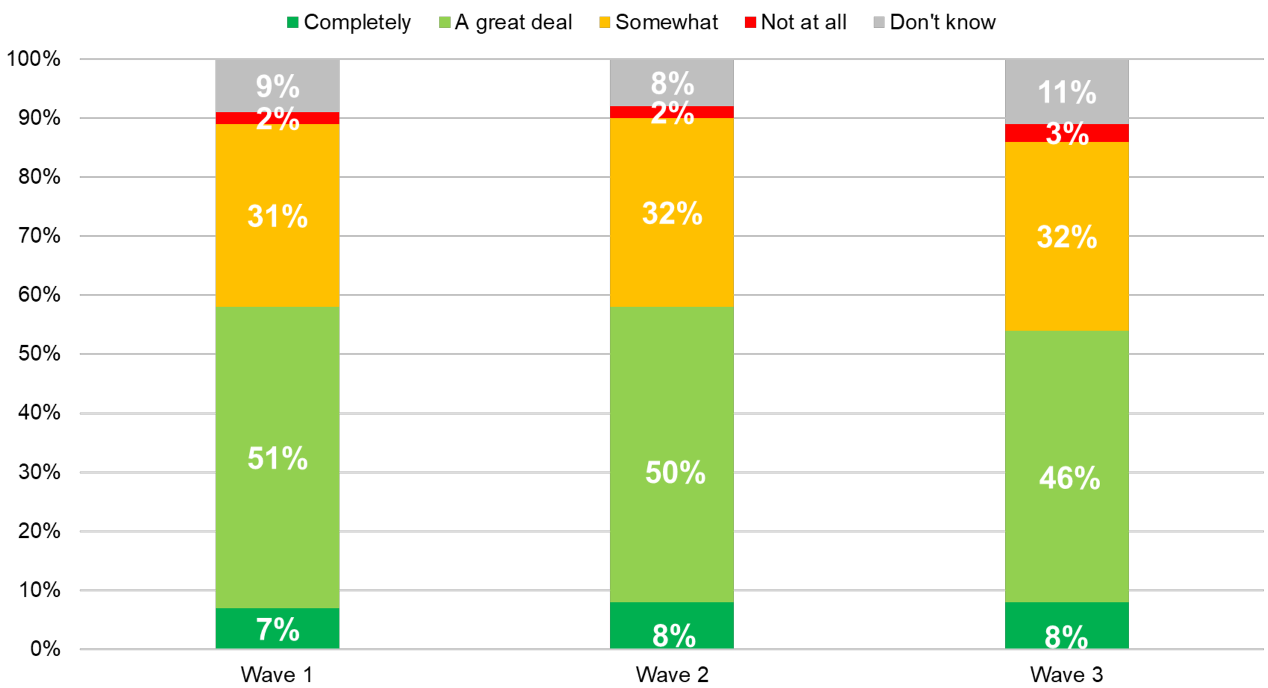
The UK system for regulating product safety

A little over a half (53%) of the UK public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe. Although this is a slight downward shift from the consistent attitudes reported in wave one and wave two (58%) it is largely resulting from increasing uncertainty, with instead, the proportion reporting that they don't know increasing from 8% in wave two to 11% in wave three,, which can be seen across most demographic sub groups. The proportion who feel the product safety system only somewhat ensures that products are safe (32%) and those who feel the system doesn't keep products safe at all (3%) remain consistent wave on wave.

As with previous waves, younger people (aged 18 to 29) are less likely to feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe (48%), compared to all older age groups (53% 30-49; 59% 50-64; 53% 65+).

In line with wave one, offline adults are more likely than the general population to feel that the UK's system for regulating the safety of products completely ensures that products purchased are safe (15% compared to 8%).

Figure 1. Extent the UK's regulatory system ensures that products are safe



Q: To what extent do you feel that the UK's system for regulating the safety of products ensures that products you purchase are safe?
Base: All respondents (W1 n=10,230, W2 n=10,296; W3 n=10,187)

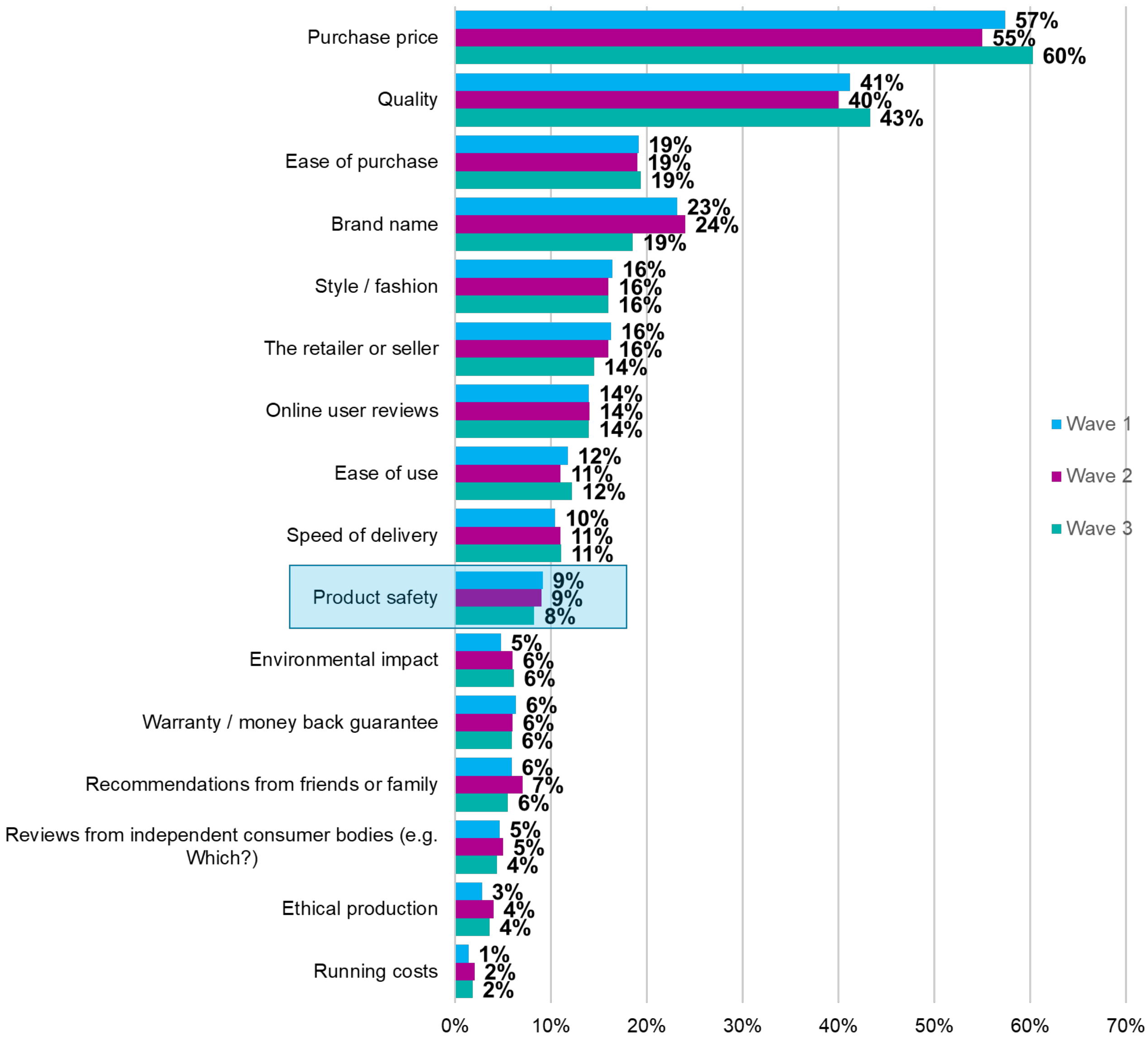
As seen previously, respondents who are white are more likely than those from a Black, Asian and minority ethnic (BAME) background to feel that the UK system ensures products are safe (54% vs 51%).

Respondents identifying as LGB+ are less likely to feel that the UK's system completely or to a great deal ensures that products they buy are safe – 50% compared with 55% of heterosexual people. Although, while this proportion remains consistent with last wave for those identifying as LGB+, heterosexual respondents have reported declining sentiment (60% in wave two).

Factors that influence perceptions of safety and product purchasing

The general public's outlook remains largely unchanged when considering purchasing a product, the safety of the product ranks 10th out of 16 factors that were presented to people who had bought products recently, with close to one in ten (8%) identifying it as a factor. In wave three women are more likely than men to identify product safety (10% compared to 6%), this is mainly as a result of the proportion of men who cite product safety dropping slightly from 8% in wave two. Those aged 65 years and over (11%) are more likely than any other age group to identify product safety as a factor (6% 18-29; 7% 30-49; 8% 50-64).

Figure 2. Factors taken into account when purchasing a product

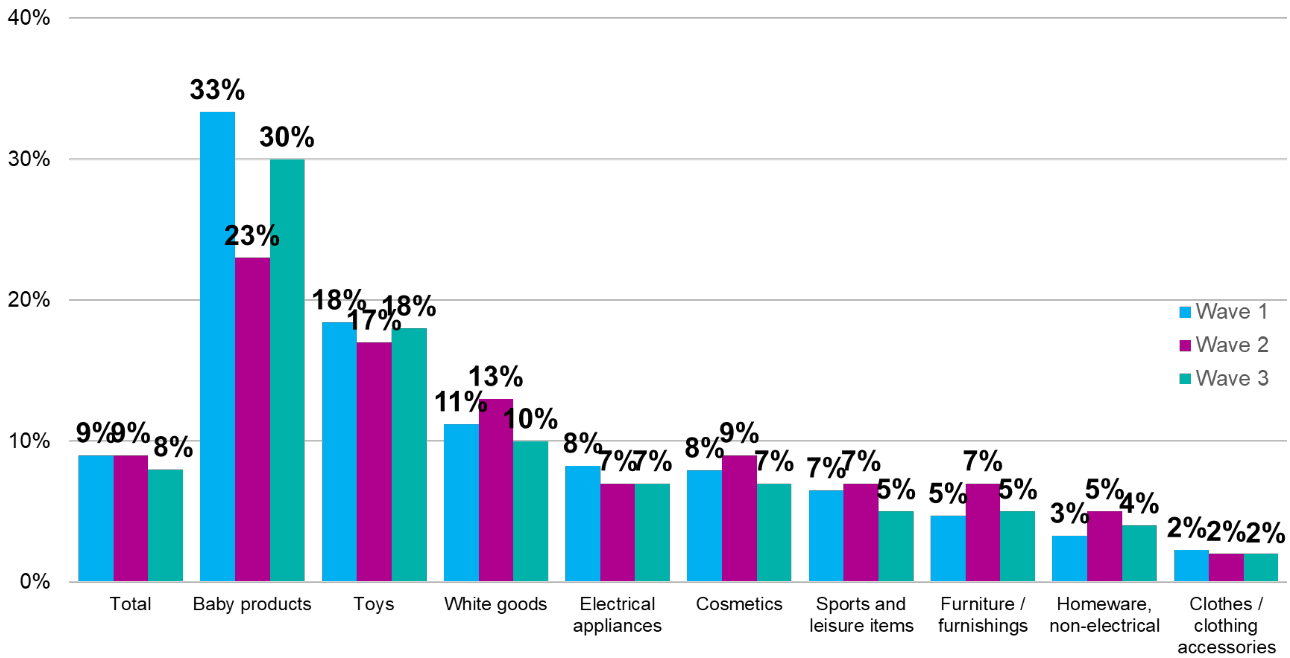


Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents allocated a product (W1 n=7,680, W2 n=8,260; W3 n=7,667)

One fifth (18%) of offline adults identify product safety as a factor when buying a product, this is significantly higher than the general population (8%).

Similar to both prior waves, there are key differences when analysing the role of product safety in purchase choice when looking at the type of product purchased. As figure three shows, when purchasing baby products (30%) or toys (18%) the consideration of product safety is much higher than when purchasing other categories of products and sits in the top three factors considered for both baby products and toys.

Figure 3. Importance of product safety in purchase choice by category of product purchased



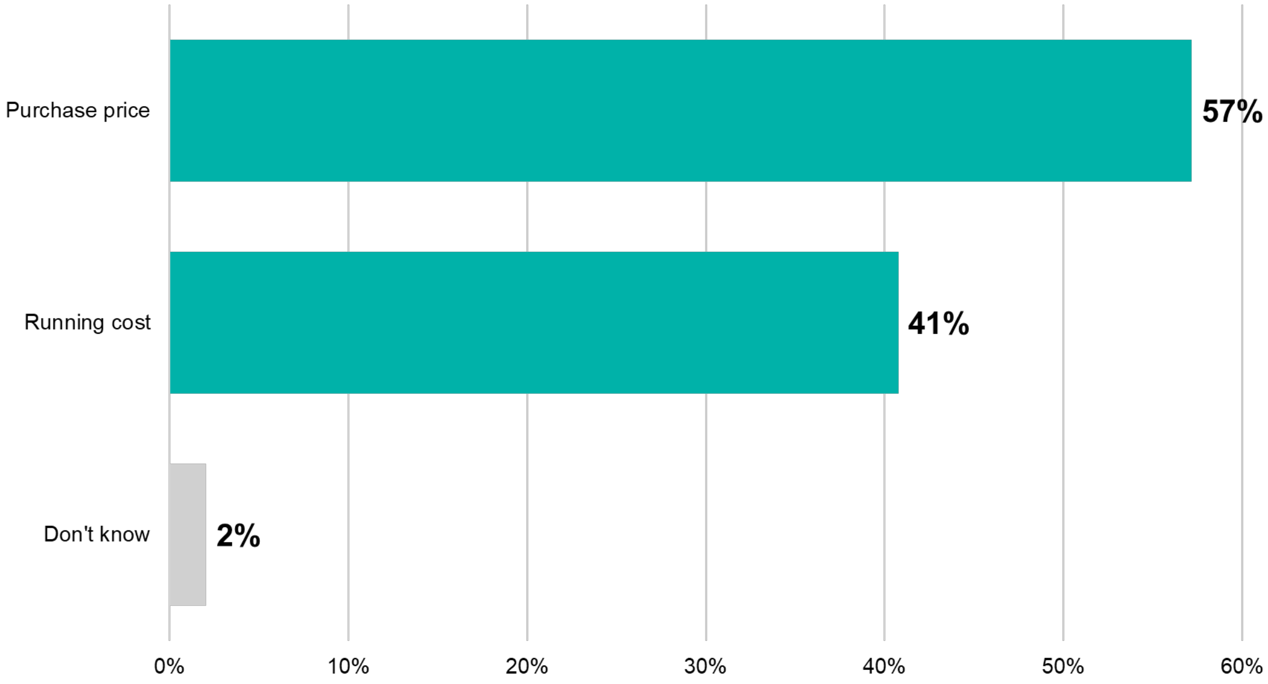
Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents (W1 n=7,680; W2 n=8,260; W3 n=7,667), product asked about: baby products (W1 n=386; W2 n=314; W3 n=385), toys (W1 n=943; W2 n=925; W3 n=930), white goods (W1 n=674; W2 n=676; W3 n=661), electrical appliances (W1 n=1,039; W2 n=1,235; W3 n=1,021), cosmetics (W1 n=986; W2 n=1,285; W3 n=998), sports and leisure items (W1 n=990; W2 n=886; W3 n=862), furniture/ furnishings (W1 n=1,072; W2 n=974; W3 n=1,044), homeware (W1 n=577; W2 n=753; W3 n=641), clothes/ clothing accessories (W1 n=1,013; W2 n=1,212; W3 n=1,125)

For baby products, alongside product safety being important, purchase price (50%), quality (38%) and ease of use (23%) were key considerations. Comparatively, for electrical products product safety ranks relatively low (7%) - instead purchase price (56%), quality (39%), brand name (24%) and online user reviews (23%) are most commonly cited.

Comparing cost-based factors, purchase price is most frequently identified at an overall level, although wave three (60%) sees a five percentage point increase from wave two (55%). Running costs is only identified as a consideration by a minority of respondents in wave three (2%).

Those in wave three who identified both purchase price and running cost as key factors in purchasing a product were asked to evaluate which one was the most important (figure 4). Close to six in ten (57%) report that purchase price was the most important consideration, compared to two in five (41%) who report the same for running cost.

Figure 4. Comparative importance of purchase price and running cost



Q: You previously said they you took both price and running costs into account when buying If you had to choose… Which was most important to you when purchasing this product?
Base: All respondents who identified purchase price and running costs (W3 n=70)

Responsibilities for product safety

The UK public are most likely to say that the government is most responsible for *setting* product safety requirements (36%) but only a small minority feel the government is responsible for ensuring a product *meets* these requirements (10%) (figure 5). Both measures have seen a slight decline compared to wave one (46%,14% respectively), with this wave on wave decline consistent across demographic sub-groups and not driven by a particular audience.

A very small proportion report that the government is responsible for resolving any safety issues that might arise (4%).

Manufacturers are seen as being responsible for ensuring that a product meets the legal safety requirements (51%), and to resolve any product safety issues (54%). Again, both representing a decline on wave one (57%, 62% respectively). Despite these decreases, manufacturers are still much more commonly identified than any other stakeholder. As above, this decline is not driven by a particular audience but rather as a result of wider shifting attitudes.

Those people with a low level of educational attainment are less likely than those with a high level of educational attainment to think that the government is responsible for setting product safety requirements (27% vs 43%). Those with lower educational levels are more likely to put responsibility on manufacturers to set safety standards (25% vs 13% of those with high education).

Over two-fifths of the UK public see the responsibility for ensuring a product is safely used sitting with the user themselves (45%). Although, a sixth (15%) of the public put responsibility on manufacturers for ensuring a product is used safely.

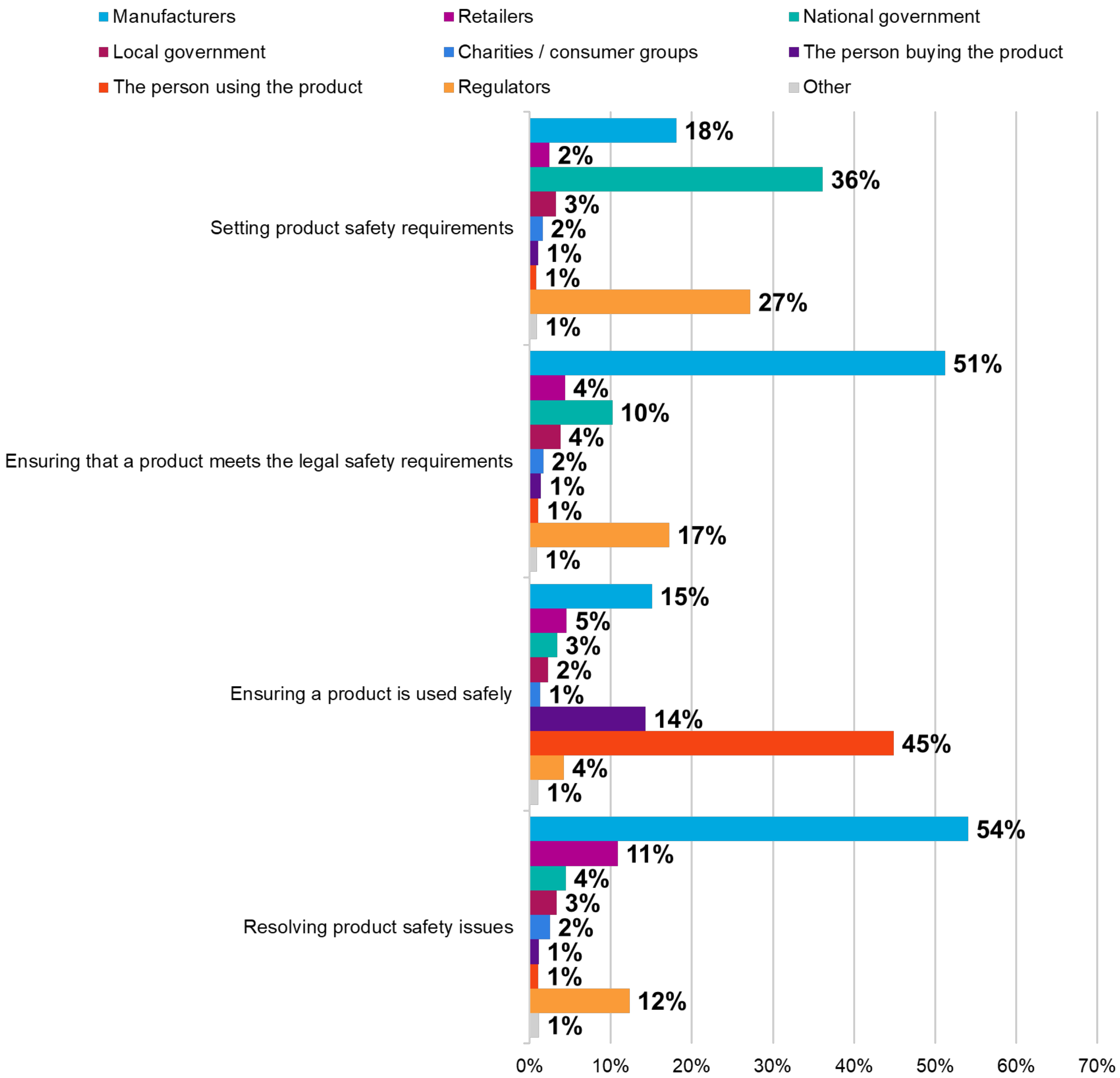
Those without children are more likely to place responsibility for ensuring a product is used safely with the user (48%), compared to 39% of those who have children in their household. UK adults without a disability are also more likely to identify the user of the product as responsible for ensuring a product is used safely (47%), compared to those who have a disability (41%).

The offline population is more likely than the general population to feel that manufacturers rather than government have responsibility to set product safety requirements:

41% of the offline population feel that manufacturers have responsibility compared with 18% of the general population. Whereas, 23% of the offline population feel that government has responsibility compared with 36% of the general population

Unlike the general public, perceptions of responsibility among the offline population have remained generally consistent with wave one.

Figure 5. Organisation most responsible for aspects of the product safety system



Q: In your opinion, who is most responsible for:
Base: All respondents (W3 n=10,187)

A larger proportion of people from a White background than those from a BAME background feel that the person using the product has the responsibility for a product being used safely (47% v 31%).

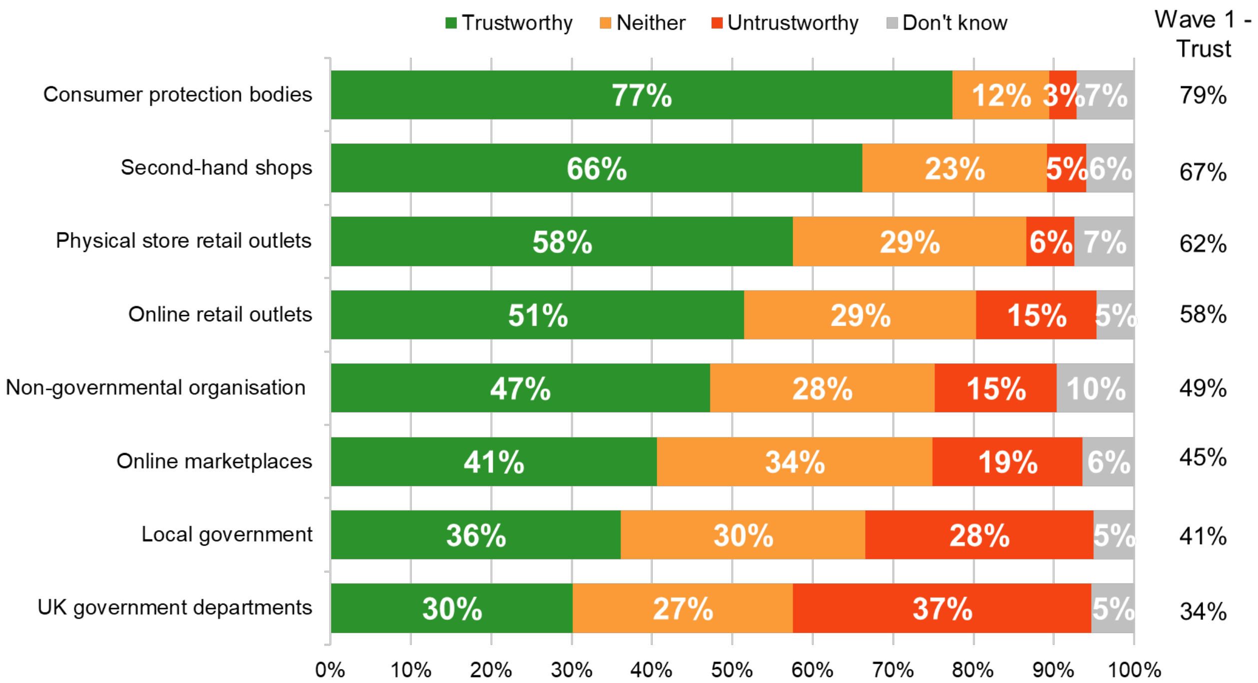
Trust in organisations associated with product safety

The UK public were asked to rate organisations that they may interact with as part of the product safety system - from government departments, who set the legal framework for product safety; the retailers which are expected to sell safe products; to the consumer protection organisations who may provide advice on issues.

The UK public has strong levels of trust in consumer protection organisations (e.g. Citizens Advice, Which?), with eight in ten (77%) saying they consider them to be trustworthy in how they operate towards them personally.

Over half the UK public also consider second-hand shops (66%), physical store retail outlets (58%) and online retail outlets (51%) to be trustworthy in how they operate. However, online retail outlets have seen a decline in trust since wave one (58%), a trend which is generally evident across all demographic subgroups.

Figure 6. Levels of trust in different organisations



Q: Of the following types of organisations, in general how trustworthy or not do you think each are in how they operate towards you?
Base: All respondents (W1 n=10,230; W3 n=10,187)

The lowest levels of trust are seen in UK government departments (30%) and local government (36%), with both also experiencing a decline in trust compared to wave one (34%, 41% respectively). Both see a corresponding increase in the proportion reporting they are untrustworthy, with UK government departments increasing from 33% to 37% and local government increasing from 25% to 28%. Similar to online retail outlets, this is a trend which is evident across demographic sub groups.

Respondents with a disability are less likely to identify UK government departments (27%) and local government (33%) as trustworthy, compared to those without (32% and 38% respectively).

Respondents identifying as LGB+ are also less likely to feel that UK government departments are trustworthy compared to heterosexual respondents (23% versus 32%).

Respondents from lower social grades (C2DE) are the least likely to find UK government department (26%) and local government (30%), compared to those in higher social grades (ABC1) (33%, 41% respectively).

As seen in wave one, trust in UK government increases with age: one quarter (26%) of 18-29 year olds reporting trust, compared to just under two fifths (37%) of 65 year olds and over. Although both groups report decreasing trust since wave one (30% 18-29s; 43% 65+).

Two fifths (41%) of offline adults identify UK government departments as trustworthy, significantly higher than the general public (30%).

This is also the case when thinking about local governments (46% compared to 36% of general public).

Comparatively, offline respondents report lower trust for consumer protection bodies (68%) compared to the general public (77%).

Qualitative findings on trust in organisations

In the qualitative research, sources of trust differed according to age/ generation. Whilst the younger groups were more likely to trust advice and information from friends and family above all else, older groups preferred to trust official sources of scientific research and tended to undertake personal research on an array of topics, instead of relying on media sources, or word of mouth.

"I usually research everything and never trust a newspaper or news channel." (40+, 2CDE).

Overall, the research indicated that participants' trust in various organisations has changed due to the impacts of COVID-19 and subsequent events. Most trust the NHS and health officials implicitly - in part due to their efforts during the pandemic, and their association with 'science-based information'.

"I trust top scientists rather than idle gossip online." (18-40, 2CDE)

"If you can't trust doctors and medical professionals then there is something clearly wrong." (18-40, ABC1)

Nonetheless, the groups were critical of the system that health professionals operate in, which was seen to be a state of needless bureaucracy.

"[the NHS has] too many overpaid managers spending their day having meetings." (40+ ABC1)

"I trust the NHS staff but think their management is useless and overstaffed." (40+, ABC1)

Most maintained trust in health professionals – and to an extent, health organisations. A decline in trust in big businesses was indicated, as it was felt that hardships throughout the pandemic revealed businesses' true priorities, which were often perceived to be 'selfish'.

"During a time where everyone is struggling, we have learnt how selfish businesses can be… they took advantage of people's fears." (18-40, 2CDE)

Both the older and younger groups were also particularly distrustful of government. For some, this was part of a long-term attitude, whilst for others it was as a consequence of media coverage around the Conservative's Christmas parties in 2021.

"*I'm finding it harder to trust business and the government as more and more negative information comes forwards." (18-40, 2CDE)*

"I don't trust the government at all at the moment, not after those parties." (40+, ABC1)

Despite current distrust in government being pervasive in the focus groups, some were more likely to trust associated government departments than others. The younger groups were more inclined to trust government departments, such as OPSS, to advise and disseminate information as specialists in their subject matter.

"They are a separate department so I would trust them more than the wider government as what they do is more specific." (18-40, 2CDE)

In contrast, the older groups were more dubious and suspected that government departments lacked impartiality. Thus, their distrust extended beyond the incumbent government to its arm's-length bodies, regardless of the department's aims.

"I have no trust in anybody who deals with the government." (40+, 2CDE)

Levels of trust in organisations that deal with consumer protection and standards was largely dependent on how independent and impartial they were viewed as being, without vested interests in profit-making, or government relations.

Consequently, some participants were sceptical of consumer-specific government departments, such as the Competition Markets Authority (CMA).

"Independent and impartial organisations are easier to trust as they have no specific party's interest at heart." (18-40, 2CDE)

"The CMA can't be trusted as they are influenced too much by major corporations." (40+, 2CDE)

Citizens Advice and Which? were amongst the most trusted organisations amongst respondents, though the level of 'trust' not only depended on the organisation's impartiality, but their level of reliability to help when the consumer needs them.

"Regarding Citizens Advice, it's not that I don't trust them, it's that it's impossible to get in touch with them if something goes wrong, the lines are always busy." (18-40, ABC1)

"Citizens Advice is okay, but so hard to see or speak to anyone." (18-40, ABC1)

Participants emphasised the importance of conducting research both when buying products, and when in receipt of information. However, many cited that when purchasing products, it has become increasingly more difficult to ascertain quality and legitimacy. A crucial part of the pre-purchase process for many involved consulting user reviews, but due to an increase in 'fake reviews', the pre-purchase process has become less transparent.

Consequently, there was a perception that relying on one's own 'common sense' was essential in buying products and being aware of things to look out for.

"I know that some reviews on Amazon and Google are paid for, so it's really difficult to trust this information." (18-40, 2CDE)

"Reviews are a must [in ascertaining the safety of a product] but even reviews can be false now." (40+, 2CDE)

"I think trial and error and common sense have served me best." (18-40, 2CDE)

Participants tended to consider a number of factors when determining product safety, from the origin of the seller and product to the reputation of the manufacturer. Sellers that were based in or products that originated from China were considered to be untrustworthy, with many participants ruling out buying products, or certain kinds of products from that area altogether.

Participants also acknowledged that it was now more difficult to ensure that sellers from online marketplaces such as Amazon were UK-based.

"Anything on eBay coming from China I would expect to be of poor quality hence the price." (18-40, ABC1)

"I wouldn't buy an electrical product from China." (40+, 2CDE)

"I'm very wary of Amazon as a lot of products will give you a UK address but come from China." (40+, ABC1)

There was a broad assumption that product testing standards in the U.K. were the 'gold standard' and greater in rigour, and so this offered peace of mind.

A select number of retailers or manufacturers that were larger and more 'reputable' (i.e., long-established) were preferred and seen to be low risk, particularly for more expensive, branded items.

"I tend to trust UK manufacturers and retailers because there are strict quality control tests before things pass to the shelves." (18-40, 2CDE)

"As soon as I see 'Made in UK' or 'EU' I feel more comfortable." (40+, 2CDE)

"I just would not buy anything of high value from [anywhere] other than the website of a reputable retailer – John Lewis…Marks and Spencer…"(40+, ABC1)

Perceptions of the Office for Product Safety and Standards

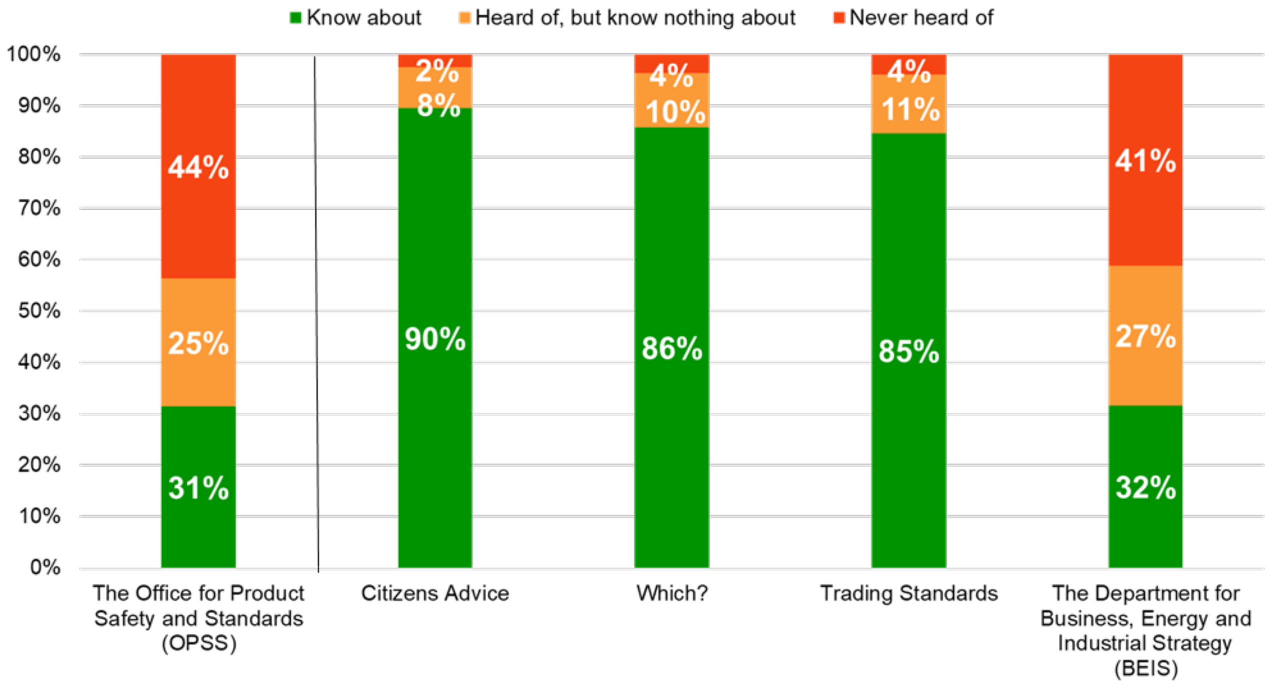
Key findings

- Over half (56%) report that they have at least heard of the OPSS, with 31% reporting that they know something about the OPSS. This is broadly comparable to awareness of BEIS (59%), and those who know something about BEIS (32%).
- A majority (52%) of those who are aware of OPSS say they trust the organisation. However, this is mostly driven by those who say it is trustworthy (45%), compared to very trustworthy (7%).
- Half of the respondents (50%) who are aware of OPSS report that their work is effective, compared to 14% who think it's not effective.
- The most common word associated with the OPSS is professional (25%), followed by impartial (21%), although among the offline population the most associated word is fair (40%).

Awareness of OPSS

A majority (56%) of UK adults report that they have heard of the Office of Product Safety and Standards (OPSS), a slight reduction from wave one (58%). The number of respondents who reported that they knew about the organisation and their work in some sense was less than a third (31%), which is also a slight reduction from wave one (33%). Those reporting that they knew 'just a little' about the OPSS's work drove this figure, with 22%. Whereas those who know a fair bit about (7%) and a great deal (2%) were very much in the minority.

Figure 7. Organisation Awareness



Q: How much, if anything, would you say you know about the following organisations and their work?
Base: All respondents (n=10,187)

Compared with other organisations, awareness of OPSS is lower, as is knowledge of their work. Citizens Advice (90%), Which? (86%) and Trading Standards (85%) all have a majority of respondents reporting that they know about those organisations, while OPSS and the Department for Business, Energy, and Industrial Strategy (BEIS) have lower levels of knowledge. More respondents report having never heard of OPSS (44%) than BEIS (41%). Knowledge of BEIS remains consistent between wave one and three, however the other organisations all had a small reduction in awareness between the waves.

BAME respondents are more likely to report that they know about the OPSS to some extent (37%), than White respondents (31%).

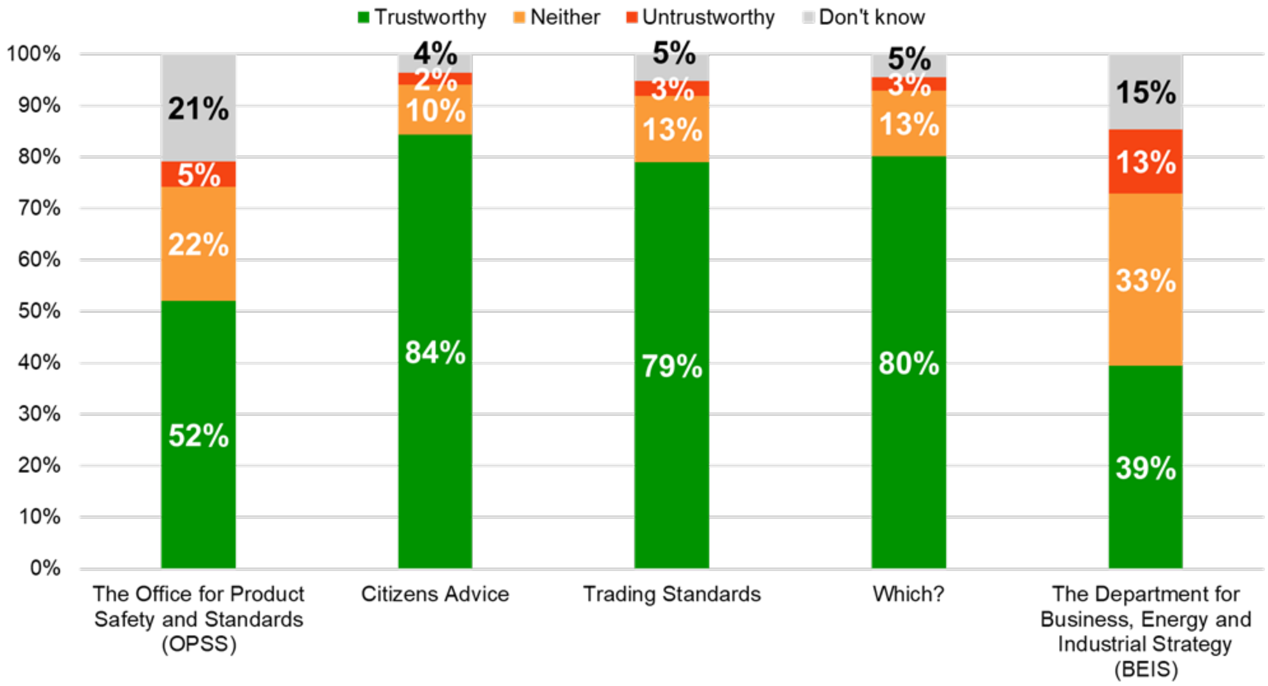
This is mostly driven by BAME respondents reporting they know a fair amount (14%) and a great deal (5%) about the OPSS - this is a higher rate than white respondents who reported 7% and 2% respectively.

Awareness and knowledge of OPSS increases among older respondents with 69% of respondents aged 65+ having heard of OPSS, compared to 50-64 year olds (33%), 30-49 year olds (28%) and 18-29 year olds (27%). Despite general awareness increasing among older age groups, in-depth knowledge amongst those aware does not increase with age. Only 1% of those in the 65+ age group report knowing a great deal, whereas 4% of those aged 18-29 report high levels of knowledge.

Trust in OPSS

Among those aware of OPSS, a majority consider it a trustworthy organisation (52%), although, this is a reduction from wave one figures (56%). Despite this, there is a low untrustworthy score, with only 5% of respondents reporting that the OPSS is untrustworthy. Respondents instead selected neither (22%) or don't know (21%). This demonstrates that it is a lack of in-depth knowledge which is preventing the OPSS from being seen as trustworthy – respondents do not know the OPSS well enough to report high levels of trust.

Figure 8. Trust in Organisations



Q: Of the following organisations, in general how trustworthy or not do you think each are in how they operate?
Base: All respondents who know of organisation (OPSS n=3,124; Citizens Advice n=9,131; Trading Standards n= 8,621; Which? n=9,073; BEIS n=3,185)

Trust in Citizens Advice (84%), Which? (80%) and Trading Standards (79%), is higher than that of OPSS, however these organisation benefit from having higher awareness which may reduce uncertainty around trust. Untrustworthy scores are only slightly higher for OPSS (5%), than for Trading Standards (3%), Which? (3%) and Citizens Advice (2%). BEIS has lower scores for trustworthiness (39%), as well as being seen as more untrustworthy (13%) than the other organisations.

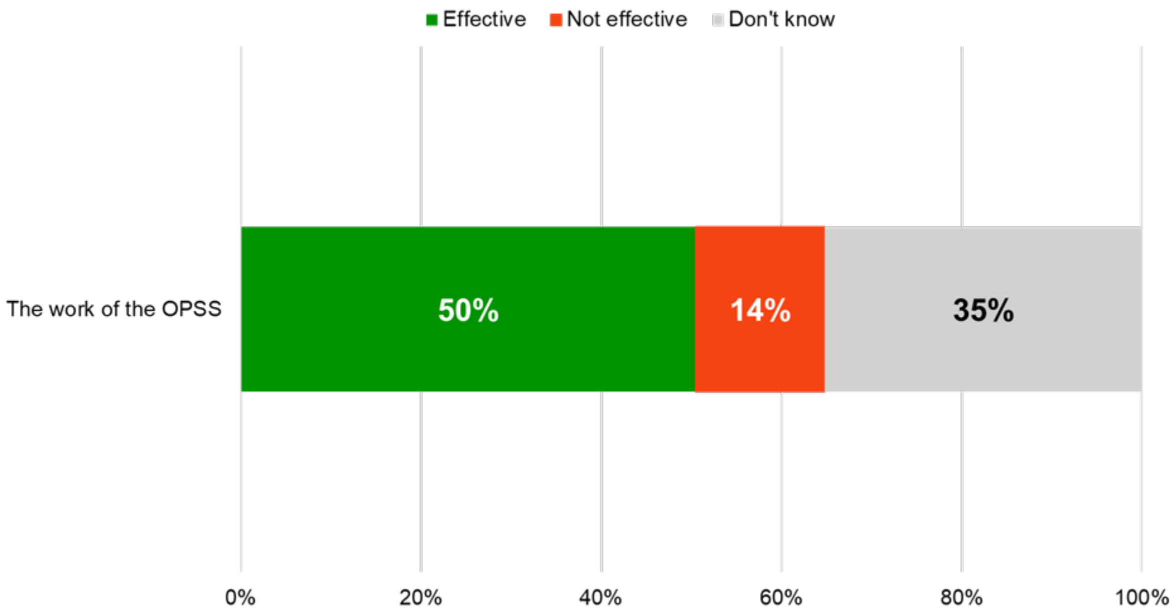
Trust in the OPSS is linked with trust in the UK government departments, with 69% of respondents who consider government departments trustworthy also considering the OPSS trustworthy, compared to 38% who don't trust government departments but do trust the OPSS.

The offline population are more trusting of the work of the OPSS, with 66%. The offline population are unlikely to consider the OPSS untrustworthy (1%, compared to 5% of the general population). However, 21% of offline report thinking the OPSS is neither trustworthy or untrustworthy, which is in line with the online population (22%).

Effectiveness of OPSS

Half of respondents (50%) aware of the OPSS consider their work to be effective, compared with 14% who report that their work is not effective – with the latter figure having increased significantly from wave one (10%). Over a third (35%) of respondents reported that they don't know how effective the work of the OPSS is.

Figure 9. Effectiveness of the work of OPSS



Q: How effective or not do you think the work of The Office for Product Safety and Standards (OPSS) is?
Base: All respondents who know of OPSS (n=3,124)

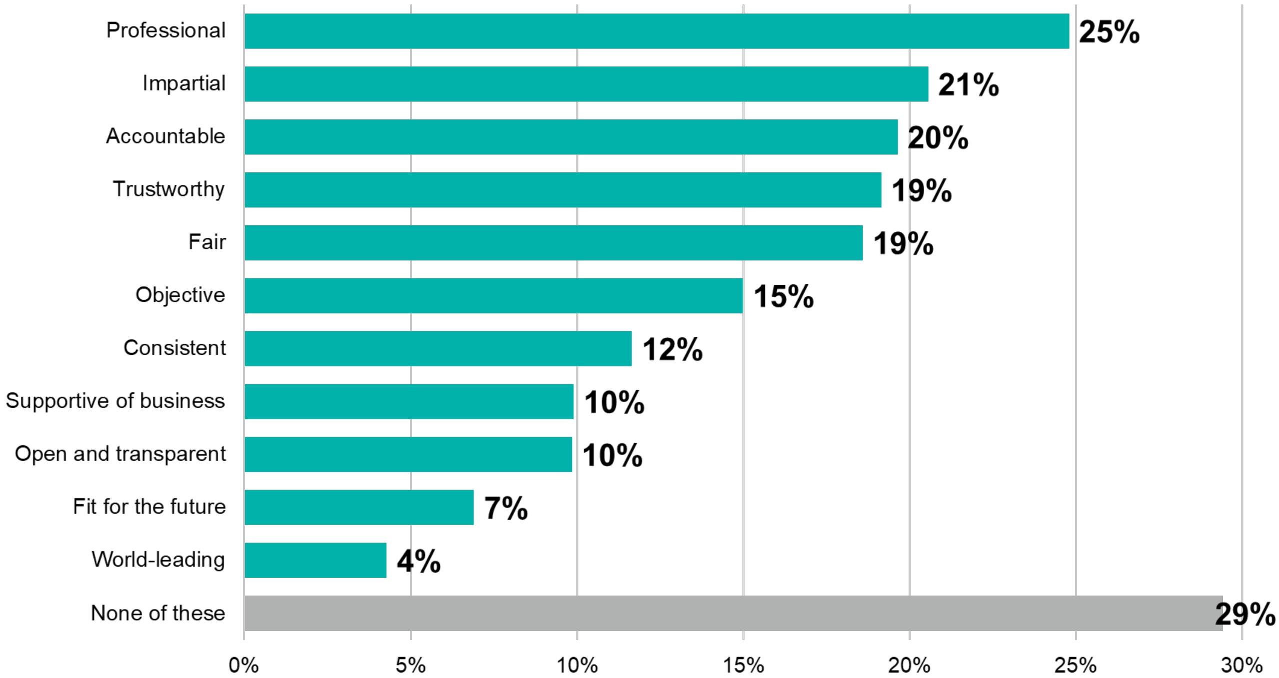
Respondents aged 18-29 (19%) and 30-49 (17%) are more likely to report that the work of the OPSS is not effective compared to respondents aged 50-64 (10%) and 65+ (13%). Don't know scores are highest among respondents aged 65+ (40%), in comparison to 18-29 year olds (32%).

Those with children in the household are significantly more likely than those without to say the work of the OPSS is effective (55% vs 50%).

Associations with OPSS

The top word which respondents associated with the OPSS is 'professional', with one in four respondents choosing this word (figure 10). 'Impartial' (21%), 'accountable' (20%), 'trustworthy' (19%) and 'fair' (19%) are also associated with the OPSS, but to a lesser extent. The most selected option was 'none of these' (29%), showing that this list of words doesn't fit with some respondent's image of the OPSS.

Figure 10. Word association with OPSS



Q: Which of the following words, if any, do you most associate with how the Office for Product Safety and Standards (OPSS) operates?
Base: All respondents who know of OPSS (n=3,124)

White respondents are more likely to report that the OPSS is 'accountable' (20%) compared to 15% of BAME respondents reporting this.

BAME respondents are however, significantly more likely (8%) to associate the OPSS with the phrase 'world-leading', compared with white respondents (4%).

All associations (with the exception of supportive of business) increase significantly among those who report being trustworthy of UK government departments. With 35% of respondents who consider government departments trustworthy saying that the OPSS is 'professional', compared with 17% of those who do not trust UK government departments.

'Professional' rises to 37% among those who consider the OPSS effective, compared to 7% among those who do not consider it to be effective, and 25% for the total sample. 'Trustworthy' also increased to 30% compared to those who don't consider the OPSS effective (5%) and the population as a whole (19%).

The offline population are more likely to have a stronger association with the OPSS as being fair (40%), than the online population (19%). This is their strongest association followed by professional (31%), and consistent, impartial and trustworthy (all 28%).

A focus on online purchasing

Key findings

- Rates of online shopping have fallen from almost two-thirds (65%) to just under three-fifths (58%) of consumers reporting to have purchased something online in the last six months. This may be due to COVID-19 restrictions around in-store shopping being relaxed.
- Consumers are less aware of their consumer rights than before - half (51%) of consumers are aware of their consumer rights if a product purchased online is unsafe, down from 57% in wave two.
- Broadly, online retailers of a range of products (e.g. Argos) are the most likely to be considered a safe online retail environment (84%) while fewer view Amazon marketplace (49%) or other marketplaces (44%) as safe.
- Of people who have purchased from an online marketplace, there is a marked increase in the proportion thinking sellers are mainly responsible for ensuring safety (31%) and a fall in thinking manufacturers are mainly responsible (31%).
- Most qualitative participants were familiar with online marketplaces but had mixed experiences using them. Some online marketplaces felt more legitimate and 'safe' e.g. Etsy, whilst platforms such as Facebook Marketplace felt risky. Consequently, many reported avoiding buying 'high-risk' items such as toys or electronics that could be faulty or unsafe.
- Levels of concern about safety of a product from outside the EU/ UK on an online marketplace are consistent (65%) and older respondents aged 65 and over are the most likely to be concerned (75%).
- The qualitative research found that many are now taking substantiated steps to shop more sustainably and locally where possible, in efforts to support their local economy.

Context around online marketplaces

The qualitative research found that most participants were familiar with online marketplaces, with the most common examples being Amazon, eBay, Etsy, Facebook Marketplace and Vinted. Whilst the younger groups were more likely to associate online marketplaces with unique, bespoke items such as Etsy, the older (40+) participants were more familiar with online marketplaces in the context of Facebook marketplace. Overall, marketplaces were associated with variety in both items and sellers.

"For me, a marketplace is somewhere where there are a lot of options and variety" (18-40, 2CDE)

"[Online marketplaces sell] maybe cheaper reconditioned or second-hand products." (18-40 2CDE)

"[Online marketplaces sell] different products from different sellers from different countries" (18-40 2CDE)

"I see that as people selling their items like a car boot sale" (18-40 ABC1)

"My interpretation of it [an online marketplace] would be a place where multiple online sellers come together in a shared platform to sell their wares." (40+ ABC1)

Participants had faced a wide variety of experiences when purchasing items from online marketplaces. Overall, attitudes towards online marketplaces were broadly positive, and online marketplaces were seen to be useful when trying to find unusual items, or shop more sustainably.

"I have purchased from Etsy. The customer service was great, and the seller kept me informed and up-to-date throughout the whole process from order to delivery." (18-40, 2CDE)

"I needed a rather niche plumbing part last month. I found the exact, genuine product on eBay via Google. It was a positive experience as I got the correct part at a good price. I felt protected through eBay, PayPal and my credit card (it was over £100), so if it wasn't the correct part or a fake, I would have been protected." (18-40, 2CDE)

"I bought a bed for my daughter, it was fine till I stood on it to reach something and broke the clips the slats go in to but bought replacements online and fixed!" (40+, ABC1)

"I generally use Amazon had a few bad items so am wary and take time to read up on the seller." (18-40, ABC1)

"I think Vinted/ Etsy are the future for more sustainable online shopping." (18-40, ABC1)

"You can get more unique items that others won't have and can buy direct from makers, so I like that." (18-40, ABC1)

However, most participants felt that purchasing from online marketplaces required extra caution and that there was less consumer protection.

"I like selling second-hand items on there, but I would never buy from Facebook, I find it terrifying." (18-40, ABC1)

"I use Facebook sales a lot as you can usually meet someone locally. I have had some really good finds on there. No protection though!!" (18-40, ABC1)

"Third party sellers could be small time scams; you pay for something that never arrives" (40+, 2CDE)

Equally, accessibility of support on online marketplaces appeared to be mixed.

"I'm a regular buyer from eBay for many years, it's mostly positive but when it comes to finding customer service support it's not straight forward." (18-40, 2CDE)

"I honestly have no worries with Amazon. Had problems with products and been refunded immediately. It makes me feel safe as had issues in store before when trying to take something back, only to get store credit for my troubles." (40+, 2CDE)

Similar to consumer organisations, perceived accessibility of support influenced levels of trust in online marketplaces, as it was felt that they couldn't trust a service if they were unable to receive help in the event of something going wrong. For most participants, the first port of call when experiencing issues on an online marketplace would be to contact the customer service, making accessibility of support an imperative factor.

For many, online marketplaces were only suitable for particular items, and most avoided purchasing electrical goods.

"If it's a product that should last several years (TV, fridge, mattress etc) I would want to use an established retailer." (18-40, 2CDE)

"I use them [online marketplaces] often to buy low risk items such as books, clothes, or items which are not of high value." (18-40, ABC1)

"Clothes tend to be a lot cheaper off vinted etc, I don't trust electricals as they aren't necessarily tested etc." (18-40, ABC1)

"The risk of receiving a faulty item and causing harm is low, worst-case scenario I have bought a faulty jumper and I can use it for something else. If they are instead selling a washing machine and it floods the house it would have a great impact on my life." (18-40, ABC1)

"Electrical goods are the thing I'm mainly wary about. I bought a cheap solar charger from eBay which doesn't work at all and I should have known better really." (40+, ABC1)

"I'd steer clear of any electricals. There have been too many scare stories of substandard, unsafe electrical goods being sold online." (40+, ABC1)

The level of 'safety' across various online marketplaces also differed, certain products such as electricals were broadly avoided. However, marketplaces such as eBay were considered to be safer due to the protections provided via PayPal, whilst Facebook Marketplace was seen as much less safe when it comes to financial protection.

"I think your expectations of what you receive are variable to where you shop – e.g Wish = cheap China stuff, Etsy handmade items etc." (18-40, ABC1)

"Yes websites such as eBay offer more guarantees that you can be refunded if you are not happy with a product whereas for somewhere like Facebook or Gumtree it's really more at your own risk." (18-40, ABC1)

Nonetheless, the 'safety' of an item was not always considered and tended to be more imperative when items were purchased on behalf of children or others.

> *"It depends what I am buying. I am much more concerned about safety if I'm buying electricals or things for the kids." (18-40, 2CDE)*

> *"For toys etc I am very wary - also when buying things for my dog." (18-40, 2CDE)*

> *"I'm more likely to buy cheap nonsense for me than someone else." (40+, ABC1)*

> *"[I'm] especially [careful] with a child. I've bought many books online for my son, but toys etc I will order through Smyths Toys or other well-known retailers." (40+, ABC1)*

> *"I think I'd exercise the same caution but there again it depends on the product - I don't buy cheap tat in the first place so if I'm buying some Lego or Duplo, well, the trust is in the brand that it's a quality product, not necessarily the seller." (40+, ABC1)*

Perceptions around safety when purchasing online

In wave three, just under three-fifths of those who purchased a product in the last six months (58%) did so online, including "click and collect" orders, down from almost two thirds (65%) who purchased a product in the six months prior to wave two. This decline in online shopping may be related to relaxing COVID-19 restrictions - wave two took place in May and June 2021 so included purchase behaviour in January 2021 during the third national lockdown which included the closure of non-essential retail.[4] Wave three took place in November and December 2021, so recalled purchase behaviour after the lifting of these restrictions on non-essential retail.

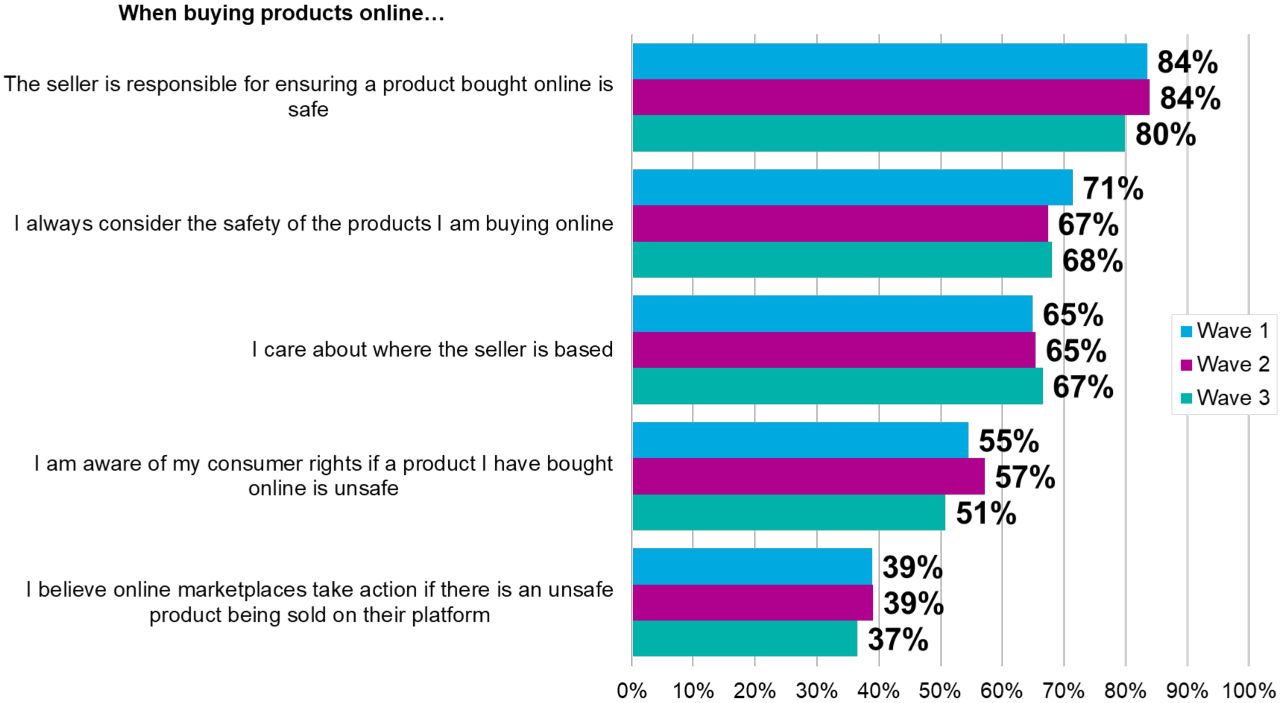
Uncertainty about safety may also be driving lower online purchasing rates; there has been a significant drop in the proportion of people who are aware of their consumer rights if a product purchased online is unsafe (57% W2, 51% W3).

This shift has primarily come from those aged 30 or over. In previous waves, it has been noted that awareness of consumer rights rises with age. This trend is still true, but there has been no change in younger respondents' awareness of their rights between wave two and three (40% W2, 41% W3). In contrast, awareness of consumer rights has dropped across all other age groups (30 to 49s: 55% to 48%, 50 to 64s: 63% to 56%, 65+: 68% to 58%) – the age trend is still evident but has flattened considerably.

There has also been a slight fall in perception that online marketplaces take action against unsafe products (39% W2, 37% W3). Previously younger respondents under 30 were the most likely to believe marketplaces do take action. As before, the age trend is still evident, but older respondents have seen the largest fall in agreement between wave two and three (65+: 36% to 29%).

[4] https://www.instituteforgovernment.org.uk/sites/default/files/timeline-coronavirus-lockdown-december-2021.pdf

Figure 11. Attitudes towards buying products online



Q: For the following question please think about when you are buying products online… To what extent, if at all, do you agree with the following statements?
Base: All respondents [in online section] (W1 n=5,115; W2 n=5,161; W3 n=5,096)

Those with low education levels are more likely to say they know their consumer rights if a product bought online is unsafe (53% low, 48% high).

Women are more likely than men to say they always consider the safety of products they purchase online (70% women, 66% men)

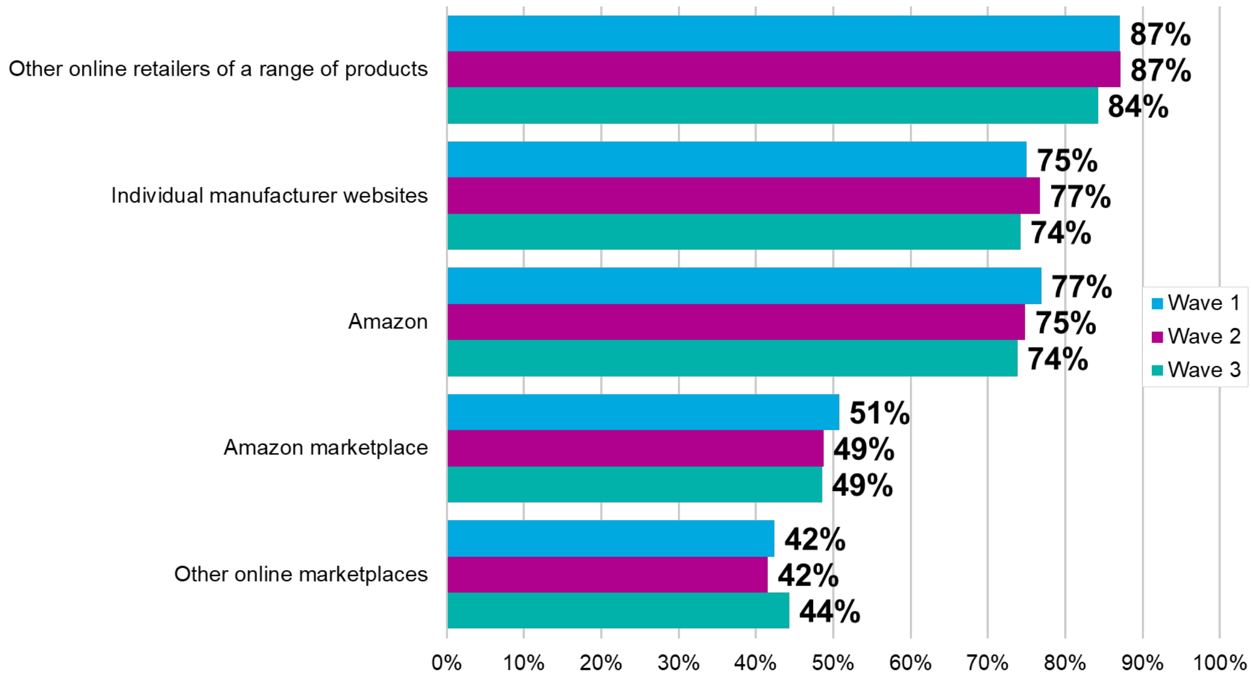
BAME respondents are more likely than white respondents to think online marketplaces take action against unsafe products (44% BAME, 36% white)

However, most of the UK public continue to feel that products bought from online retailers, marketplaces, and manufacturers are safe. As in previous waves, online retailers of a range of products are most likely to be seen as safe (84%), followed by three quarters who believe products bought from individual manufacturer websites (74%) or Amazon (74%) are safe.

In wave three, there has been a marked drop in the proportion of women who see online retailers with a range of products as safe (88% W2, 83% W3) while there has been no shift in the perception amongst men. This has meant that, while they remain the most likely to be considered safe, online retailers of a range of products are seen as slightly less safe than in wave one and two.

Marketplaces continue to be seen as less safe in general, with just half considering products bought from Amazon marketplace (49%) being seen as safe and there is now a consensus across all age groups. In wave one and two, there was a clear age trend with younger consumers (aged 18-29) more likely than older consumers to question the safety of products purchased through Amazon marketplace, but in wave three around a quarter of all age groups consider Amazon marketplace to be unsafe (27% 18 to 29, 28% 30 to 49, 25% 50 to 64, 25% 65+).

Figure 12. Perceptions of safety of products from different online environments



Q: Generally when purchasing products online from online marketplaces or direct from individual company websites how safe or not do you think the products you purchase are?
Base: All respondents [in online section] (W1 n=5,115; W2 n=5,161; W3 n=5,096)

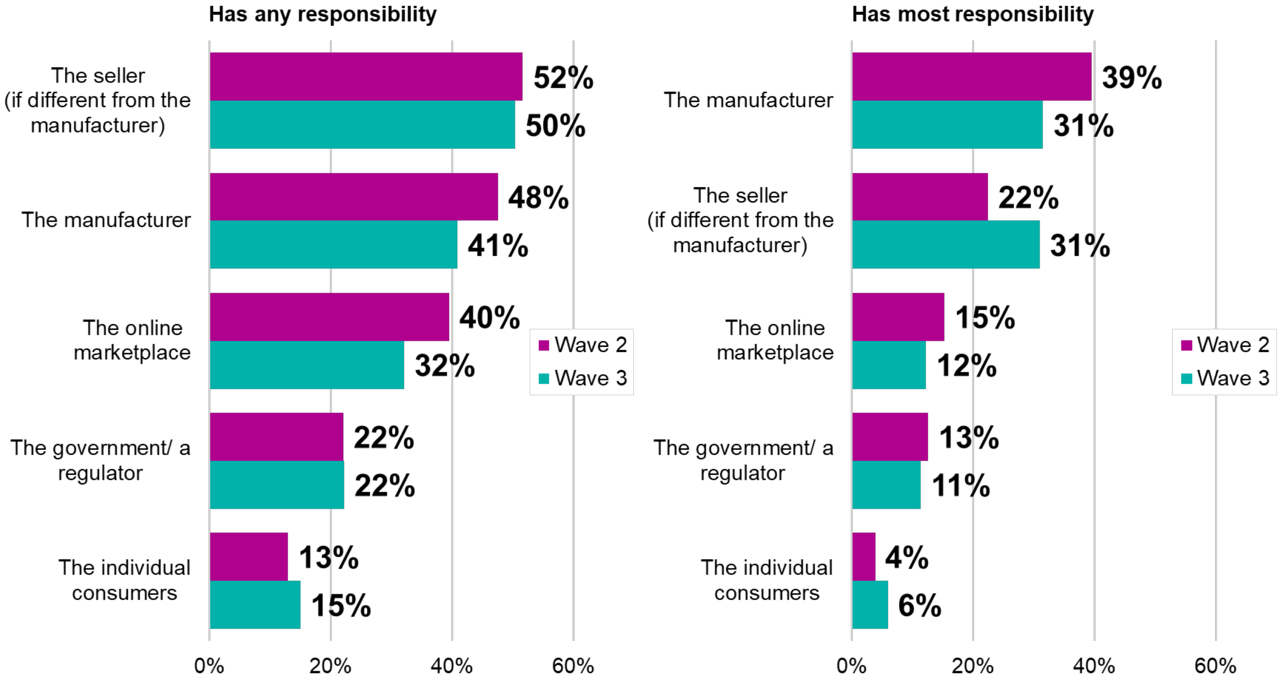
Responsibility for safety when purchasing online

Of those who have purchased products from an online marketplace, half (50%) continue to think the seller has some responsibility for ensuring the product is safe. However, there has been a marked fall in the proportion of believing the manufacturer (41%) or online marketplace (32%) has any responsibility for ensuring products are safe.

In wave three, there has been a marked increase in the proportion thinking the seller has the most responsibility in this regard (31%). The rise in perceived responsibility lying with the seller has come from a significant drop in the those who believe the manufacturer has the most responsibility (31%) – meaning the UK public is now split on who has the most responsibility.

Specifically, men are now significantly more likely to say the seller has main responsibility (24% W2, 32% W3) and less likely to say the manufacturer has main responsibility (39% W2, 29% W3). White respondents, regardless of gender, have also shifted towards sellers having main responsibility for ensuring product safety (21% W2, 31% W3) and away from manufacturers having this responsibility (41% W2, 31% W3).

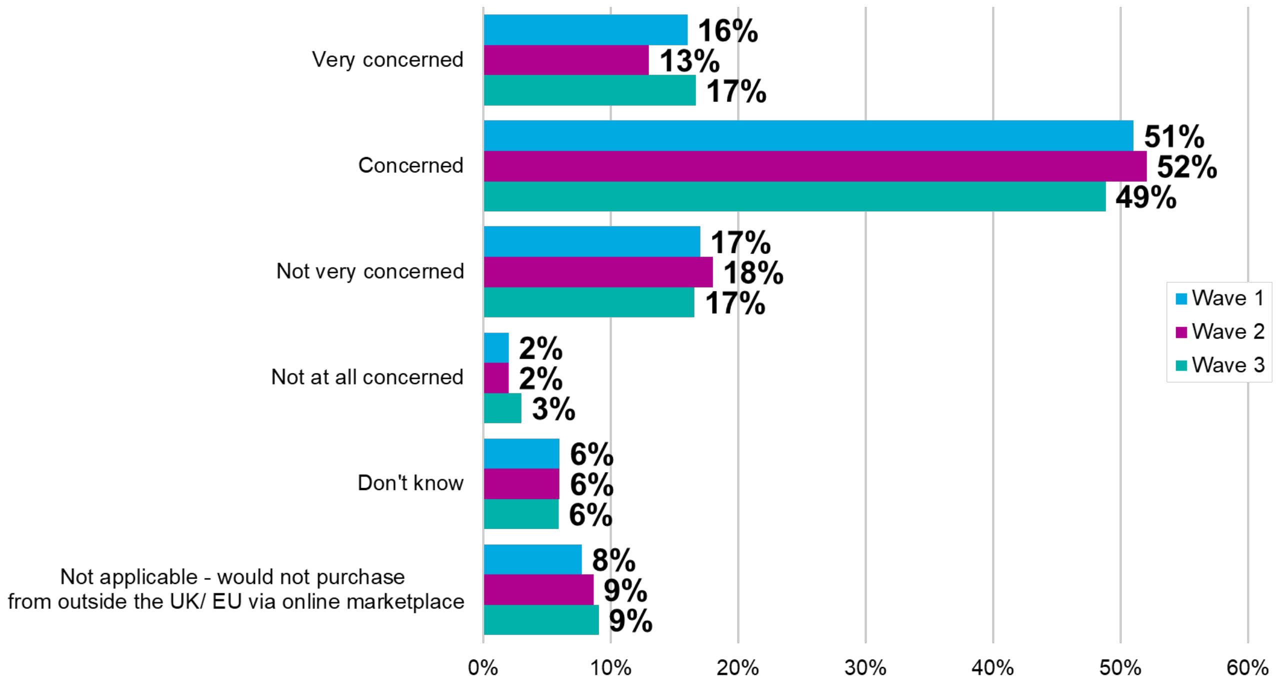
Figure 13. Responsibility for ensuring a product is safe for UK consumers



Q: Who do you think is most responsible for ensuring that the product is safe for UK consumers?
Q: Who do you think has any responsibility for ensuring that the product is safe for UK consumers?
Base: All respondents who purchased a product from an online marketplace (W2 n=695; W3 n=686)

Around two thirds (65%) of the UK public continue to be concerned about a product from outside the EU/ UK being unsafe compared to a product from within the EU/ UK – this is broadly unchanged from the previous waves. Similarly, concern remains highest amongst older consumers with three-quarters (75%) of those aged 65 and over concerned about non-EU products compared to just over half (55%) of those aged 18 to 29.

Figure 14. Concern for a product from outside EU/ UK on an online marketplace being unsafe compared to product from within EU/ UK



Q: If you were purchasing a product from outside the EU/ UK through an online marketplace (e.g. eBay, Etsy, AliExpress etc.), how concerned would you be about the risk of a product being unsafe compared to a product from within the EU/ UK?
Base: All respondents [in online section] (W1 n=5,115; W2 n=5,161; W3 n=5,096)

Black, Asian, and Minority Ethnicity (BAME) respondents are now less likely to be concerned (61%) about purchasing from outside the UK/ EU than white respondents (66%).

Consumers whose first language is English (66%) are more likely than those whose first language is not English (57%) to be concerned

Qualitative findings on online purchasing

The findings indicated that there were a persistent few that made an extra effort to ‘shop local’ either in-person or online with independent retailers, due to the decline of high street, alongside a more overarching effort to be more sustainable. The commitment to shop independently and sustainably predominantly came from the higher social grade participants, perhaps due to them possibly having greater disposable income to steer their purchase choices. There was reluctance from some to shop with ‘chains’, which aligns with the initial decline in trust of big businesses.

“I think that during the pandemic, [online shopping] was my only distraction, however now that shops are open, I try to buy from local/ UK-based brands more and to reduce my carbon footprint.” (18-40, ABC1)

"For the run-up to Christmas I got most of my stuff from independent retailers." (18-40, ABC1)

"I am way more conscious of environmental impact of purchases now and I try to find sustainable solutions." (18-40, ABC1)

"I prefer to shop at bricks and mortar, I like to see it in its integrity. If we all shopped online, there will be no high streets, and the world will become a closed culture." (40+, 2CDE)

"I try and support local where I can as a lot of people where I live have their own business." (40+, ABC1)

"DVDs I try to buy more in physical stores because it goes some way to help the high-street and people's jobs, and I'm happy to pay the little bit extra knowing that the online sellers like Amazon only undercut because they 'operate' out of tax havens like the Channel Islands." (40+, ABC1)

However, for some, the opportunity to buy things online was a necessary lifeline, as they were more vulnerable, or their mental wellbeing had declined as a result of COVID-19.

Amongst most participants, there was a sense that shopping online had become safer throughout COVID-19, which participants suspected was as a result of online offerings for retailers being more crucial than ever.

"I rely on online shopping heavily due to my health. It's a lifeline for me." (40+, 2CDE)

"My anxiety of shopping in public has increased due to COVID-19." (18-40, ABC1)

"COVID-19 has played a major part [in shopping changes] for me and has made me depressed up to a point where I struggle to leave the house on some days." (18-40, ABC1)

"Payment options online and the protection they offer make a big difference." (18-40, 2CDE)

For many participants, this impression that online shopping had become safer encouraged them to move more of their shopping online and continue to once that shops reopened and become more accessible again. Nevertheless, participants were still very vigilant with their purchases and carried out research where they deemed it necessary.

"There's more protection now than there was." (18-40, 2CDE)

"These days online shopping is safer than the high street." (40+, 2CDE)

"Transactions can be traced back a lot easier nowadays so more confidence and trust." (40+, 2CDE)

A focus on second hand purchasing

Key findings

- Nearly two thirds (65%) of the UK public identified at least one product they would be likely to buy second hand, unchanged from wave one.
- Clothes / clothing accessories (36%), furniture / furnishings (34%), and sports and leisure items (29%) are the most frequently cited items that the public would buy second hand.
- Those who would buy second hand more commonly say they would do this through offline means (85%) rather than online (77%).
- In line with wave one, the majority (79%) who would buy second hand agree that they would consider the safety of the product they are buying. A similar proportion (76%) agree that it is the seller's responsibility to ensure the product is safe, while just under half (49%) agree that they are aware of their consumer rights if a product they have bought is unsafe.
- Checking the reviews of the seller is the most commonly cited way of ascertaining whether a second hand product is safe (50%), followed by checking to see if the product looks used (42%).
- A small minority who would buy second hand would not do anything to determine whether the product is safe (8%).

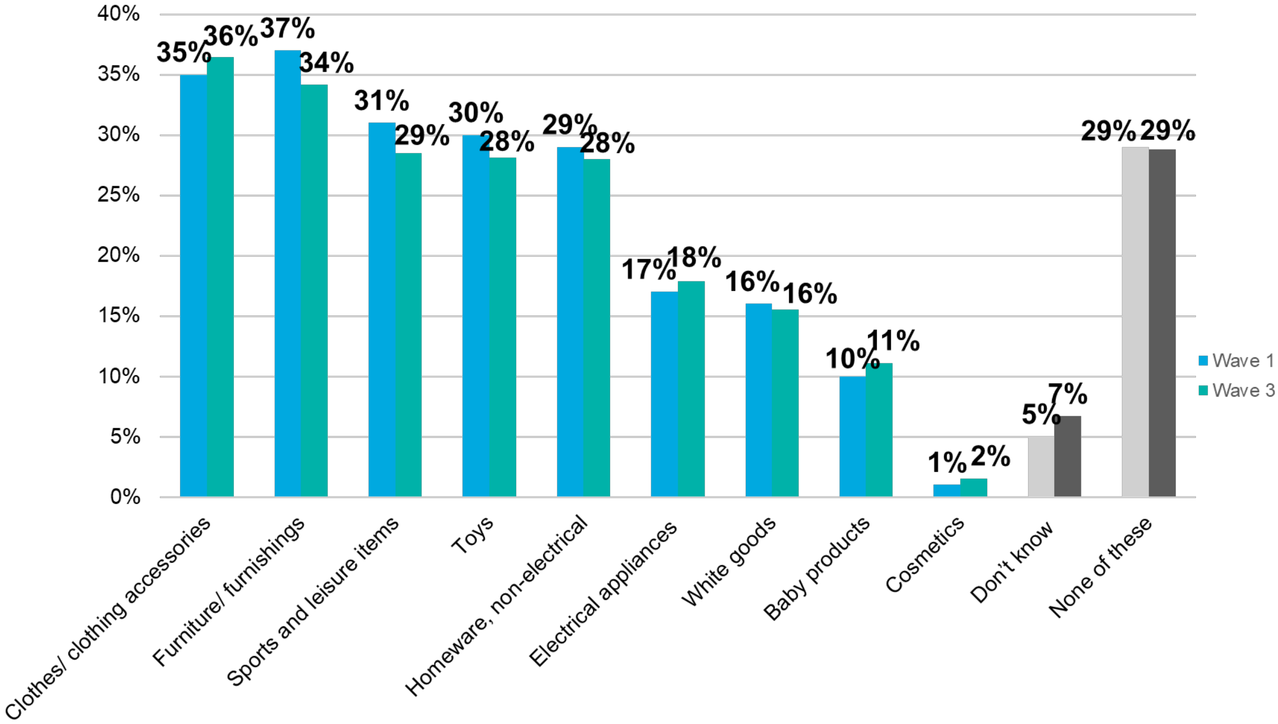
Consideration for second hand purchases

Nearly two thirds (65%) of the UK public identified at least one product they would be likely to buy second hand, remaining unchanged from wave one. Of these products, respondents are most likely to purchase clothes / clothing accessories (36%), furniture / furnishings (34%), and sports and leisure items (29%). While white goods (16%), baby products (11%) and cosmetics (2%) are the least likely to be reported.

As with wave one, those with children in their household are more likely to report they would purchase at least one product second hand (70%), compared to both the general public and those with no children in their household (64%). Among this group, those with children 5 years old and under are the most likely to report buying second hand (76%).

Respondents with a household income of under £25,000 (69%) are also more likely than average to report likelihood. Comparatively, those with low educational attainment (61%) are less likely than those with high attainment (68%) to report doing so.

Figure 15. Products likely to buy second hand



Q: Today, if you were looking to buy these types of products, which would you be likely to purchase second hand rather than new? (Please select all that apply)
Base: All respondents [in second hand section] (W1 n=5,115; W3 n=5,091)

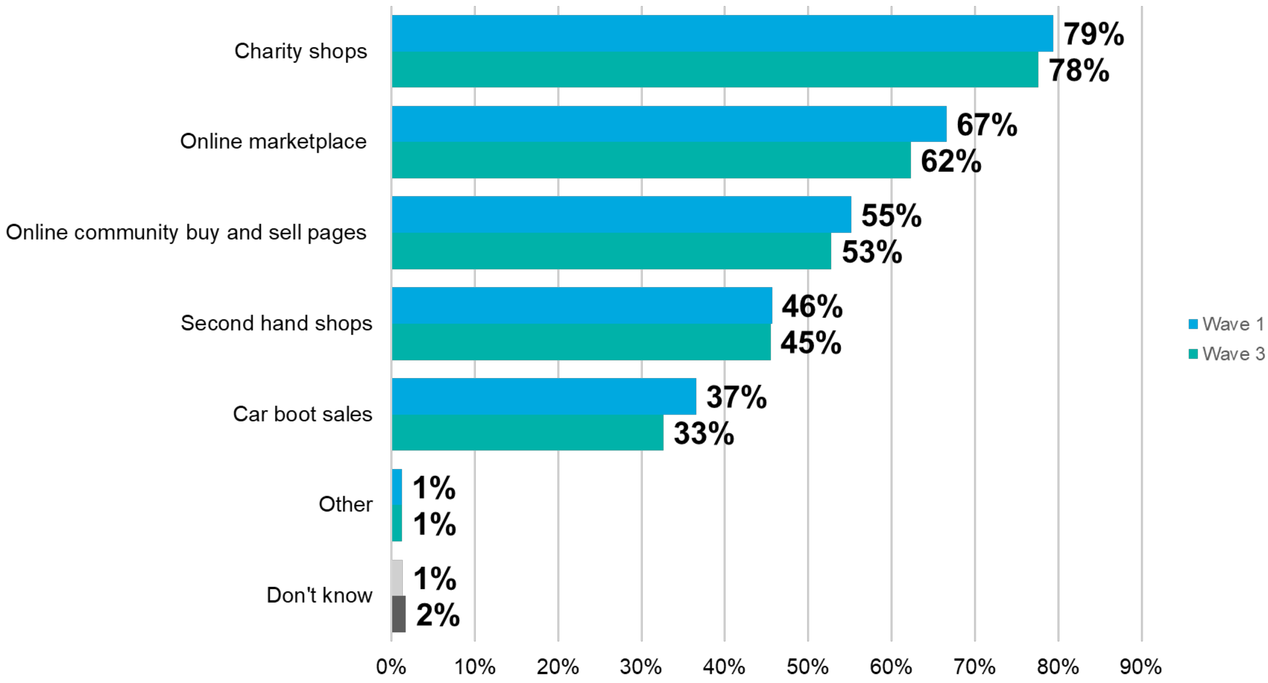
Offline consumers are less likely than the general public to say they would buy products second hand – a little under half (48%) would not buy any of the listed product categories second hand.

Respondents with a disability are more likely to report they would purchase a product second hand (68%), compared to 64% of those without a disability.

Of this group, likelihood is driven by those who are limited a little by a disability (70%), compared to those who report they are limited a lot (66%).

Although overall people are more likely to purchase second hand products through offline means rather than online (85% compared to 77% respectively), the top three methods are charity shops (78%), online market places e.g. Amazon, eBay, Etsy etc. (62%) and online community buy and sell pages e.g. social media community groups such as Facebook Marketplace, Gumtree etc. (53%).

Figure 16. Places to purchase second hand products



Q: In which, if any, of the following places would you purchase second hand products? (Please select all that apply).
Base: All who would buy second hand [in second hand section] (W1 n=3,383; W3 n=3,338)

There are limited changes compared to wave one in likelihood to use a certain source for second hand purchases, however, the proportion reporting they would use an online marketplace decreased from 67% to 62% and car boot sales declined from 37% to 33%.

Although the majority report they would use a charity shop for second hand purchases, and this is the case across most products, those buying electrical appliances are most likely to report they would use online marketplaces (e.g. Amazon Marketplace, eBay, Etsy) (75%).

Respondents aged 65 and over are most likely to report they would use a charity shop for a second hand purchase (90%) compared to all other age groups, while they are significantly less likely than all other ages to identify online marketplaces (49%), online community buy and sell pages (38%) and second hand shops (36%).

Respondents of a higher social grade (ABC1) are most likely to identify charity shops (79%) and online community buy and sell pages (55%) compared to those of a lower social grade (C2DE) (charity shops 76%; online community buy and sell pages 51%). Meanwhile, those of a lower social grade are more likely to identify car boot sales (36%) compared to ABC1s (30%).

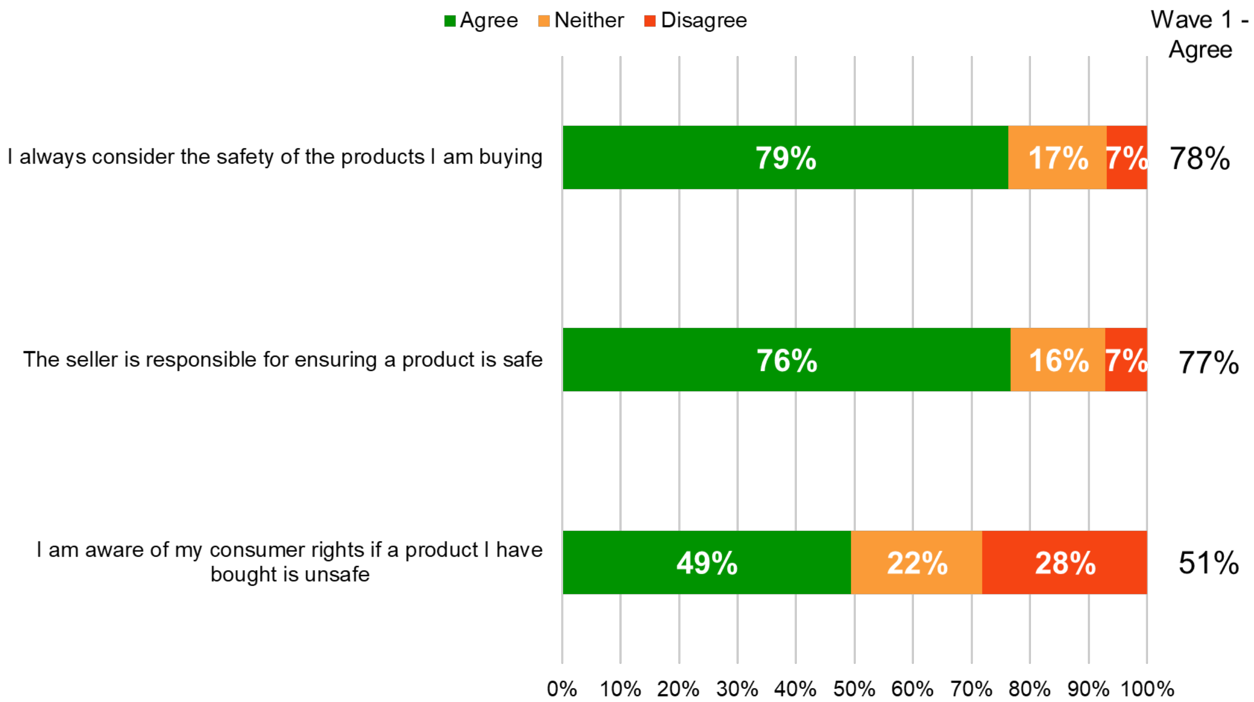
Respondents with a disability are more likely to identify offline means (87%) compared to those without a disability (84%):

For example, this audience is more likely to identify car boot sales (37%) compared to 31% of those without a disability.

Safety considerations for second hand purchases

There is very little change from wave one when examining considerations with second hand purchases. Nearly eight in ten who would buy items second hand agree that they consider the safety of these products when purchasing (79%), three quarters agree that the seller is responsible for ensuring safety (76%) and just under half (49%) agree they are aware of their consumer rights.

Figure 17. Agreement on second hand products and safety



Q: To what extent, if at all, do you agree with the following statements?
Base: All who would buy second hand [in second hand section] (W1 n=3,383; W3 n=3,338)

Those aged 65+ are the most likely to agree they consider the safety of the products they are buying (92%), significantly higher than all other age groups. Comparatively those aged 18-29 are significantly more likely to disagree that they consider the safety of their second hand purchases (15%) compared to all other age groups.

As seen in wave one, younger age groups (18-29) are the most likely to assume that the seller is responsible for ensuring a product is safe . A little over four fifths (80%) of 18-29 year olds who would purchase second hand products agree that the seller is responsible for ensuring a second hand product is safe, compared to three quarters (76%) of respondents overall.

Those with low educational attainment are most likely to agree they consider the safety of the products they are buying (82%), compared to those with a medium (78%) or high (77%) attainment.

This is also the case with awareness of consumer rights: 56% of those with low educational attainment agree they are aware, compared to 50% of medium and 43% of high.

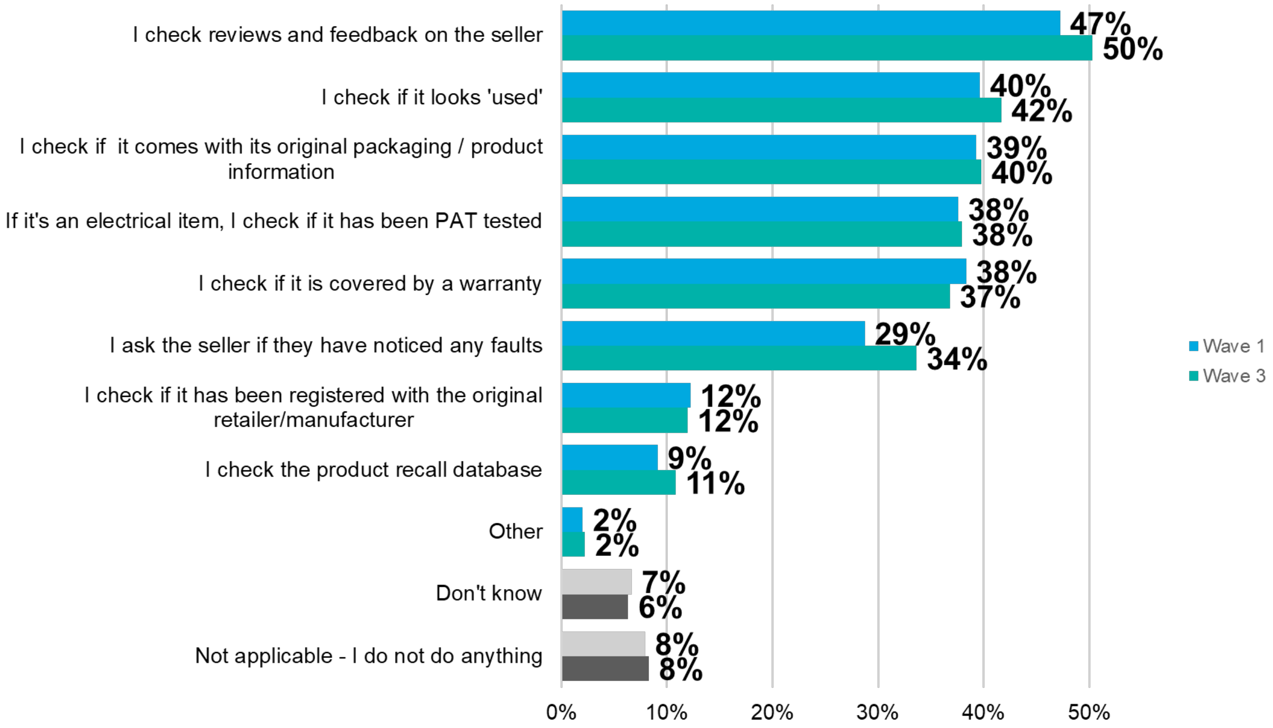
Respondents from a Black, Asian and minority ethnic (BAME) background (55%) are also more likely than white respondents (49%) to report being aware of their consumer rights.

The proportion of those who agree that they are aware of their consumer rights is consistently higher when looking at those who know about OPSS and BEIS. For those who report knowing about OPSS, the proportion who agree that they are aware of their consumer rights increases significantly to 69%, and for BEIS it increases to 66%.

Offline consumers who shop second hand are more likely than the general public to agree with each statement – nine in ten say they always consider the safety of products (92%), eight in ten believe the seller is responsible for ensuring a product is safe (83%), and a similar proportion agree they are aware of their consumer rights (83%). For the latter, this represents a significant increase compared to wave one (72%).

In line with wave one, a small minority of respondents who would buy second hand do not do anything to determine whether a product is safe (8%). For those who do check, checking reviews and feedback on the seller are the most commonly used method to ascertain safety with just under a half reporting this (50%), which is a small, although statistically significant increase on wave one (47%). This is followed by checking to see if it looks ‘used’ (42%) or if it is in its original packaging (40%).

Figure 18. Ways of determining safety of second hand products



Q: In which, if any, of the following are ways you determine whether a second hand product is safe?
Base: All who would buy second hand [in second hand section] (W1 n=3,383; W3 n=3,338)

A little over one in ten (11%) report checking a database of products that have been recalled to ascertain the safety of a second hand product, a small but significant increase on wave one (9%). This is part could be due to an increase among those aged 18-29, in wave one only 6% reported checking this, this has now increased to 10% for this age group. Resultantly, there is no longer any difference between the age groups when identifying this safety measure.

There is also an increase in those who ask the seller if they have noticed any faults (from 29% to 34%), which is somewhat driven by those aged 30-49. The proportion in this age group who report this increased between wave one and wave three (from 30% to 37%), while other age groups remained stable.

The proportion of those who check reviews and feedback on seller increases to six in ten for those who would purchase second hand through an online marketplace (59%) or online community buy and sell pages (60%). Just under two fifths of those who would buy second hand on a marketplace (37%) or community buy and sell pages (39%) check to see if it has been PAT tested, this is significantly lower than those making a second hand purchase in charity shops (42%), second hand stores (42%) and car boot sales (43%).

Experiences of safety issues

Key findings

- One in ten respondents who bought a product within the last 6 months reported experiencing a safety issue of some kind.
- Those who bought baby monitors (16%), extractor fans (14%) and musical instruments (14%) were the most likely to have a safety issue.
- Issues with sports and leisure items were reported as the most serious by respondents (5.5 out of 10).
- Distress/ increased stress is the most common impact from a safety issue with a product (19%), with the exception of 'none of the above' (56%).
- Of those who experienced physical harm (17%) due to a safety issue with a product, 32% needed some form of first aid and 17% needed urgent medical attention.
- Out of respondents who had a safety issue with a product, the majority (71%) took some form of action as a result. The most common action is to return the item for a refund/ exchange (23%).

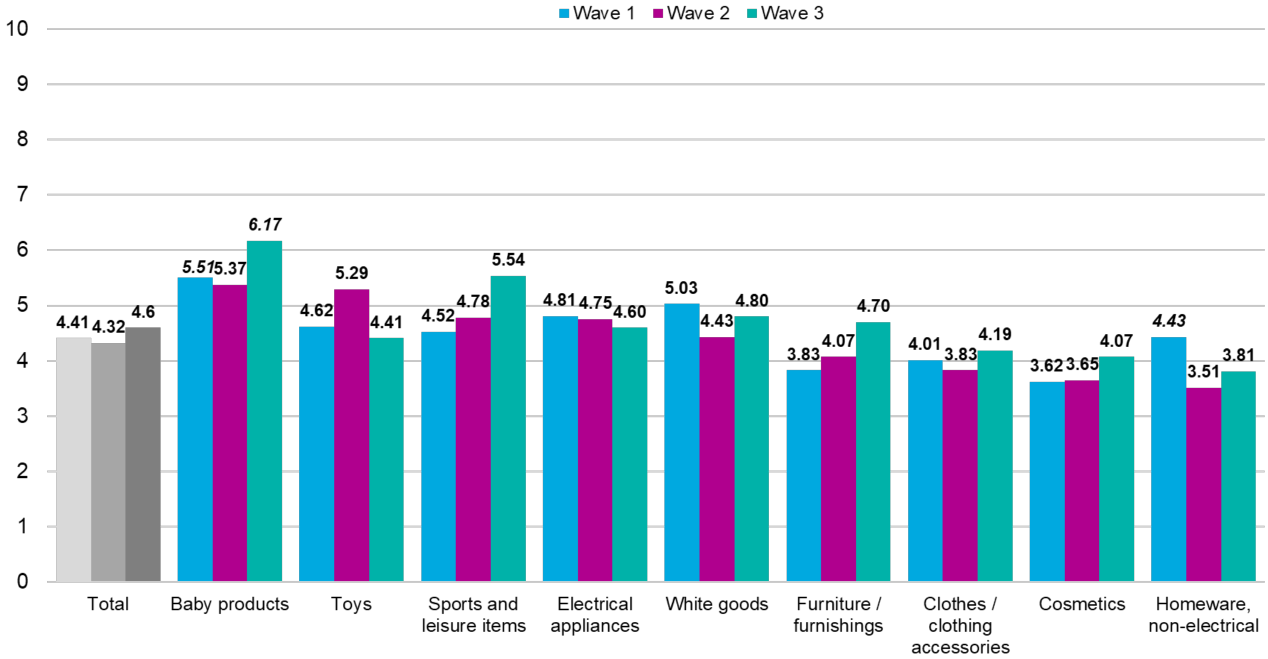
Seriousness of safety issues

Out of those who bought a product within the last 6 months, 10% experienced a safety issue of some kind. This is in line with the wave two survey (10%) and a slight increase from wave one (8%). The most likely products which respondents reported a safety issue with in wave three are a baby monitor (9% W2, 16% W3), extractor fan (20% W2, 14% W3) and musical instruments (18% W2, 14% W3). These figures are a reduction from wave two where the top product to have had a safety issue was a changing table (13% W1, 23% W2, 13% W3). However, there has been no significant reduction in safety issues overall.

There has been no significant increase in the seriousness of safety issues, with wave three having a mean of 4.6 on a ten-point scale, compared to 4.32 in wave two. However, there is a significant decrease in the percentage of those who said the issue was less serious, from 46% in wave two, to 40% in wave three.

Safety issues with baby products are consistently considered to be more serious (6.17) than safety issues with other products. However, in wave three white goods safety issues were considered more serious (4.80) than they were in wave two (4.43).

Figure 19. Seriousness of safety issue with product



Q. Thinking about the safety issue you had with the following product: product …Please consider a scale of 1 to 10, where 1 represents the least serious type of issue you could face and 10 represents the most serious. What number best represents the seriousness of the issue?
Base: All who experienced a safety issue with a listed product: total (W1=591; W2=783; W3=721), product asked about: baby products (W1=29[5]; W2=41[5];W3=36[5]), toys (W1=61; W2=62; W3=68), white goods (W1=50; W2=66; W3=56), electrical appliances (W1=110; W2=120; W3=127), cosmetics (W1=79; W2=122; W3=114), sports and leisure items (W1=67; W2=90; w3=75), furniture/ furnishings (W1=62; W2=90; W3=74), homeware (W1=47[5]; W2=63; W3=55), clothes/ clothing accessories (W1=86; W2=129; W3=116)

Impact of safety issues

The impacts of the safety issue experiences remain consistent with the previous wave, with 44% of respondents who had an issue with a product experiencing physical harm, distress/ stress and or property damage, in line with wave one and wave two.

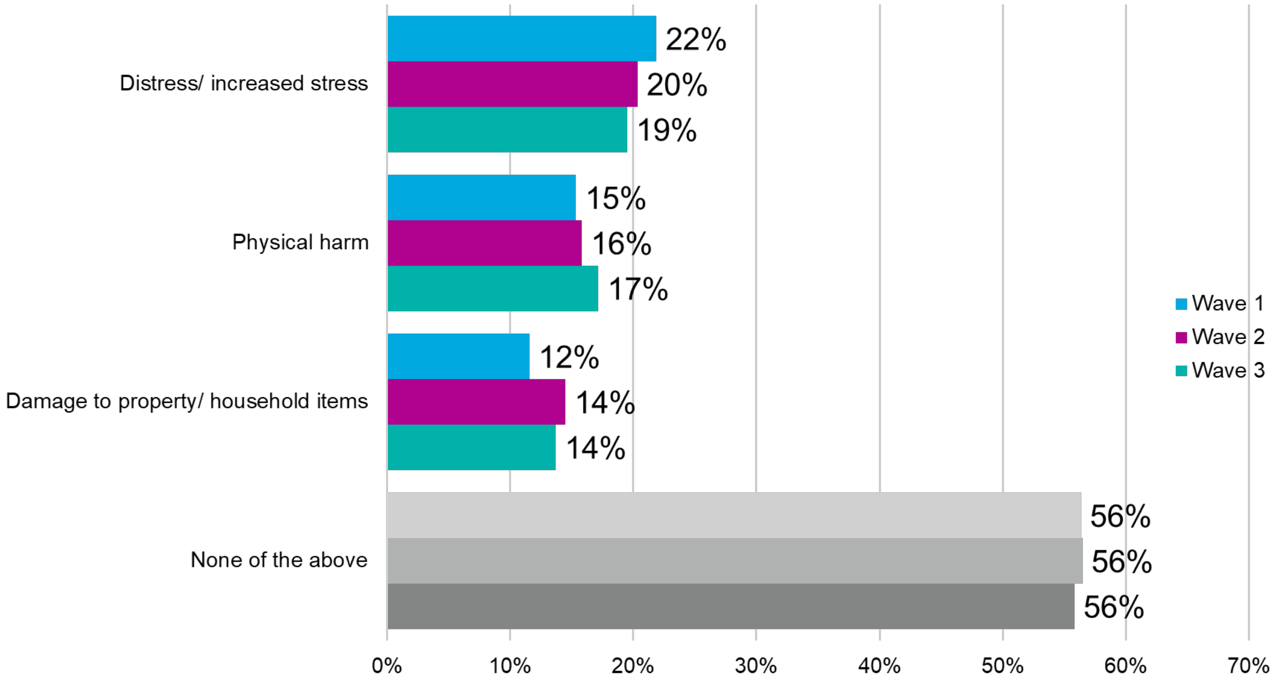
Distress/ increased stress is consistently the most frequently encountered effect of the safety issue, with 19% of respondents who had a safety issue reporting they experienced this. Those who had a safety issue with a white good are the most likely to report distress/ increased stress (24%).

Respondents with a disability which limits their day-to-day life are more likely to have had the safety issue they experienced cause physical harm (21%), than those without a disability (14%).

They are also more likely to have had property damage as a result of the safety issue (18%) than those without a disability (10%).

[5] Note: small base, treat with caution

Figure 20. Effects of the safety issue



Q. You said you experienced a safety issue with the following product: product … Did that safety issue cause any of the following?
Base: All who experienced a safety issue with a listed product (W1=591, W2=783, W3=721)

Out of those who experienced property damage due to a safety issue with a product, dents and/or scratches to property is the most common resulting issue (41%), followed by electrical damage (34%) and fire damage (24%). The mean cost of the repairs necessary due to the property damage is £135, however this figure was driven by repair costs under £100 (32%).

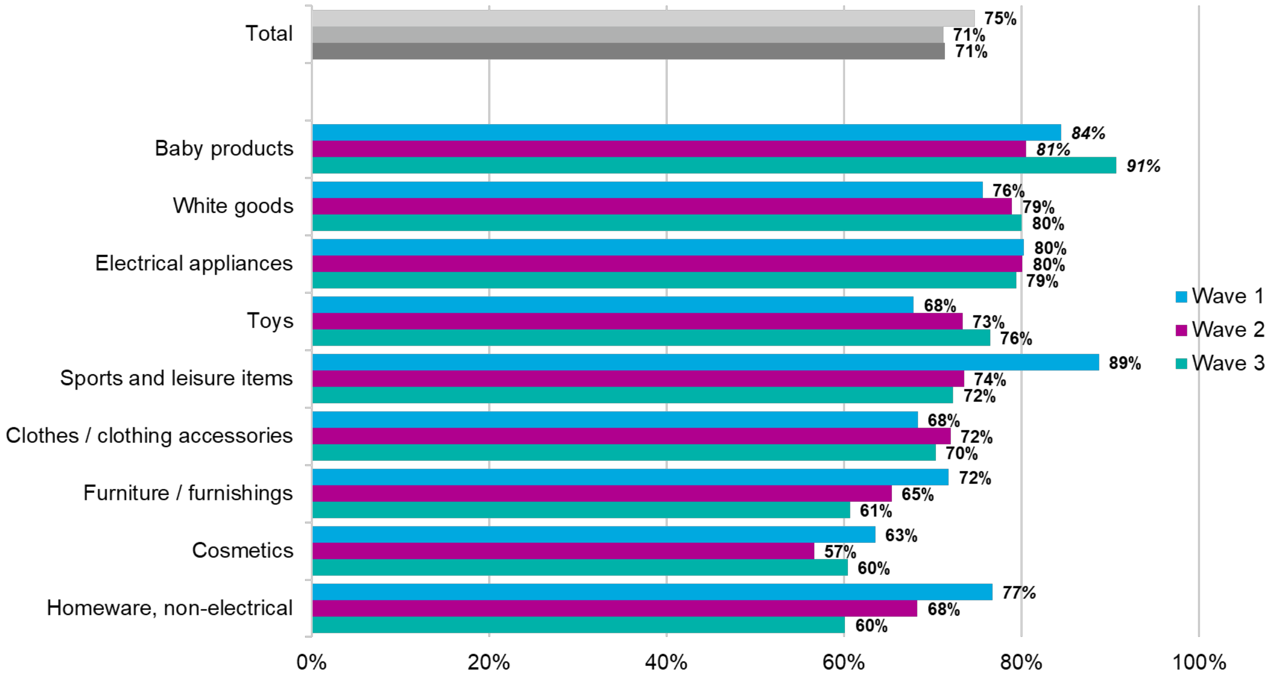
Of those who experienced physical harm due to a safety issue with a product, 32% needed some form of first aid, 23% needed no aid and 17% needed urgent medical attention.

Actions as a result of safety issues

Of those who experience a safety issue with a product, the majority (71%) report they took some action. Issues with white goods or electrical appliances are more likely to prompt an action of some kind (80%, 79% respectively).

Respondents with children in the household are significantly more likely to take an action (84%), than those without children in the household (62%). This difference is more pronounced among those with children under 5 years old in the household (87%). The same is true of respondents with caring responsibilities (82%), when compared to those without caring responsibilities (69%).

Figure 21.Proportion who took action, by product category of the safety issue



Q. Which of the following actions did you take after becoming aware of the safety issue with the Base: All who experienced a safety issue with a listed product: total (W1=591; W2=783; W3=721), product asked about: baby products (W1=29[6]; W2=41[6];W3=36[6]), toys (W1=61; W2=62; W3=68), white goods (W1=50; W2=66; W3=56), electrical appliances (W1=110; W2=120; W3=127), cosmetics (W1=79; W2=122; W3=114), sports and leisure items (W1=67; W2=90; w3=75), furniture/ furnishings (W1=62; W2=90; W3=74), homeware (W1=47[6]; W2=63; W3=55), clothes/ clothing accessories (W1=86; W2=129; W3=116)

The most common action taken by respondents who experienced a safety issue with a product is to return the item for refund/ exchange (23%). This is followed by submitting a complaint with the retailer/ place it was purchased (15%), then throwing it away but not returning it (14%).

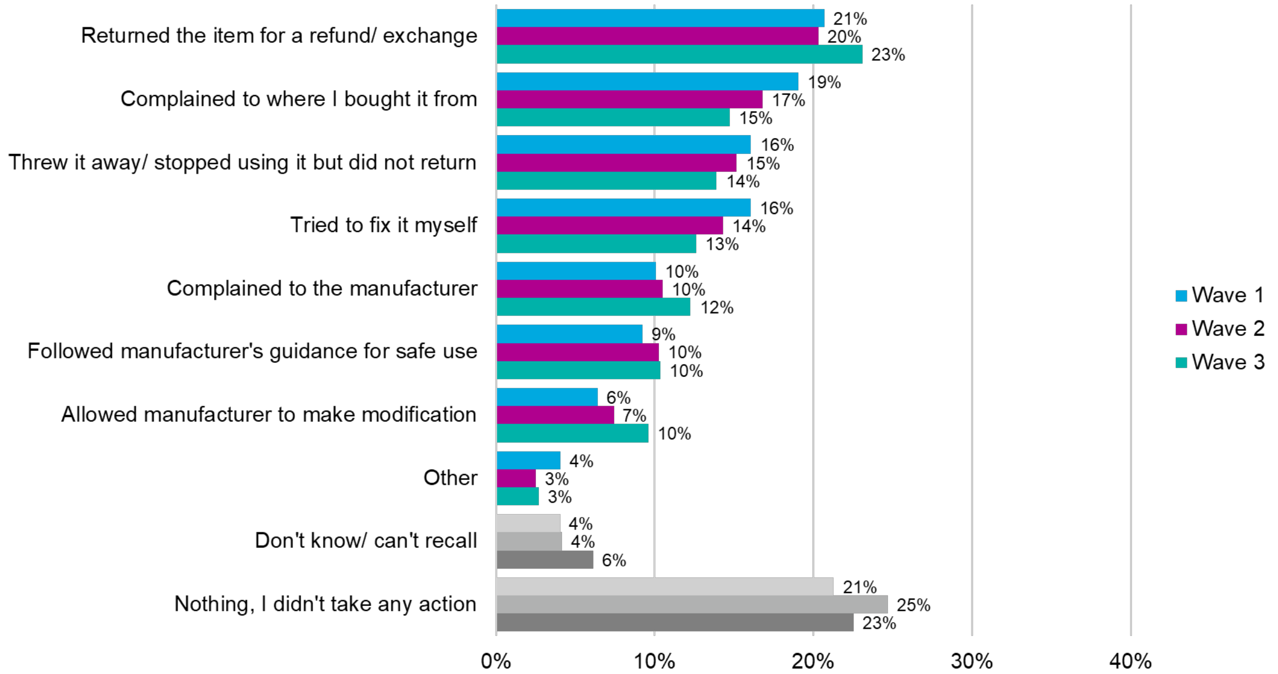
Those in age groups 30-49 and 50-64 (both 27%) are more likely than 18-29 year olds to return the item for a refund/ exchange (17%). Respondents aged 18-29 are more likely than older respondents to involve the manufacturer in some way, by either complaining directly to the manufacturer or allowing the manufacturer to make a modification (both 16%), which is consistent with previous waves. BAME respondents are also more likely to

[6] Note: small base, treat with caution

allow the manufacturer to make a modification (16%) in comparison with white respondents (7%).

Respondents with high educational attainment are more likely to try and fix the product themselves (16%), than those with low education (8%). Women are significantly more likely to throw away the product or stop using it but not return it (18%), than men (10%), but men are less likely to take any action at all (69%), than women (73%).

Figure 22. Actions taken as a result of product safety issue



Q. Which of the following actions did you take after becoming aware of the safety issue with the following product?
Base: All who experienced a safety issue with a listed product (W1=591; W2=783; W3=721)

A quarter of those who took no action, said they did not because the safety issue was not important enough to do so, which is consistent with wave two. However, 16% said they didn’t take any action because it would not have made any difference, and 13% reported that the issue resolved without the need to act. Those with high educational attainment were more likely to think their safety issue was not important enough to warrant any action (35%), than those with medium level of educational attainment (19%).

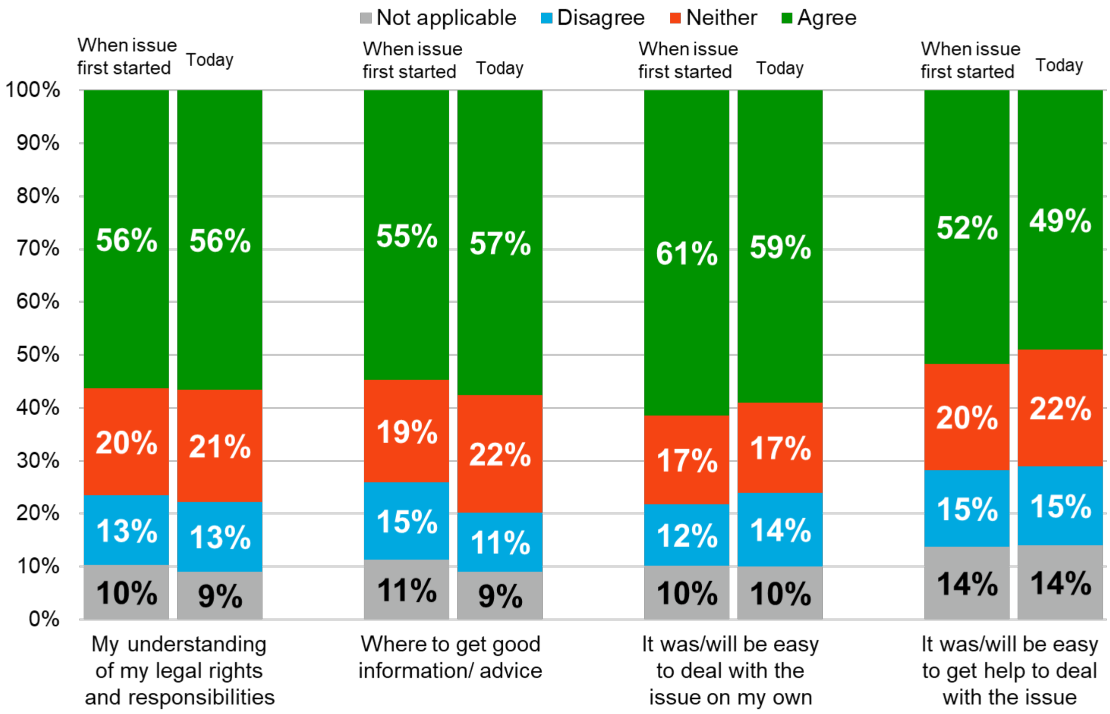
Understanding rights and responsibilities

When respondents who experienced a safety issue of some kind were asked to think about when their issue first started, the majority (61%) believed the issue would be easy to handle on their own and 52% believed it would be easy to get help with the issue. These figures are consistent with the wave one data (65% believed the issue would be easy to deal with on their own, 54% thought it would be easy to get help). While both agreement levels fall slightly when the respondents were asked how they feel about the statement 'today', they are still broadly comparable with how the respondents felt at the beginning of the safety issue.

Over half of respondents (56%) agreed that they understood their legal rights and responsibilities when the issue first started; however, this is a significant reduction from wave one data (63%). The wave three proportion remains consistent when asked the same question thinking about 'today'.

Comparing how they felt when the issue first started to the point of interview, there was a significant reduction in the number respondents who disagreed that they knew where to get good information/ advice, from 15% when the issue started, to 11% "today". With respondents instead moving into the neither agree nor disagree (from 19% to 22%) category or the agree category (from 55% to 57%).

Figure 23. Do you agree or disagree with the statements about the safety issue you had: When the issue first started…/ And today…



Q. To what extent do you agree or disagree with the following statements about the safety issue you had with the following product: product? When the issue first started/ And today …
Base: All who experienced a safety issue with a listed product (W3 n=721)

Perceptions and experiences of product recalls

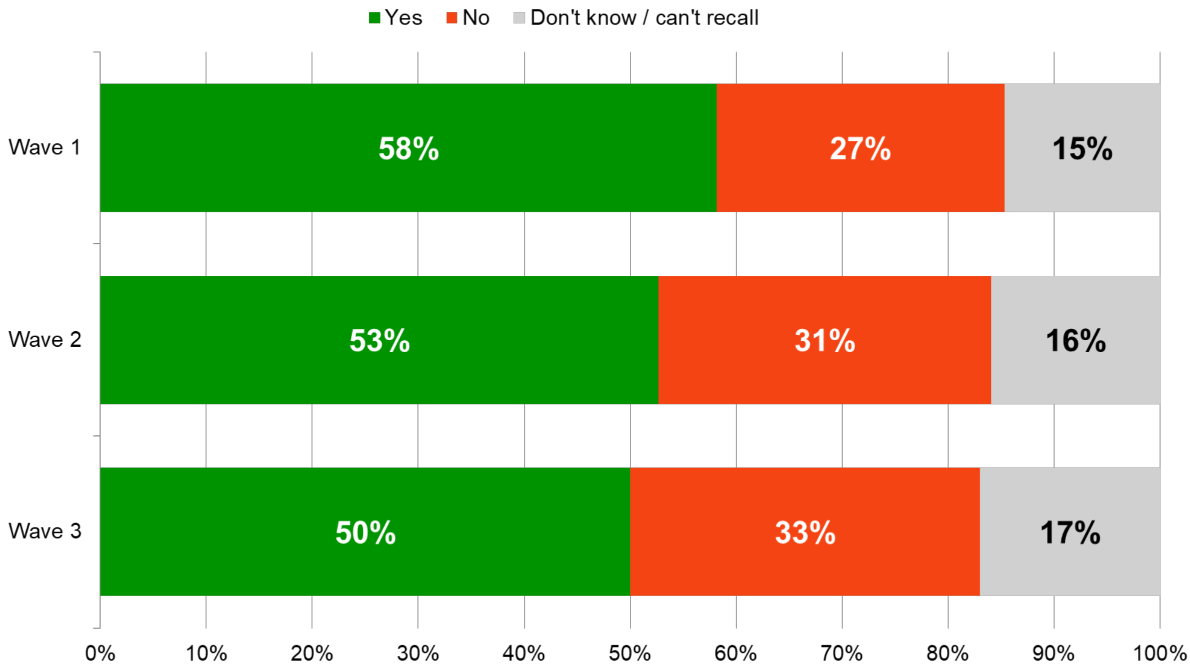
Key findings

- Awareness of product recalls over the last two years is falling (58% W1, 53% W2, 50% W3), with young people maintaining the strongest awareness of product recalls.
- Consistent with previous waves, most of the UK public would prefer to be contacted directly about a product recall for something they own – either via the manufacturer (57%) or seller (52%).
- Despite lower awareness in general, the proportion reporting a product they own having been recalled is consistent at one in ten (11%).
- White goods remain the most common product recalled (29%), but this has significantly declined compared to wave one (44%). There has been a marked rise in the proportion reporting recalls for electrical appliances (17% W1, 21% W3).
- Although direct contact is the preferred method of learning about a recall, the proportion saying they found out about their recall from the seller has fallen (27% W2, 18% W3). The proportion finding out about recalls from the media continues to grow (27% W1, 32% W2, 36% W3).
- Despite the changes in type of product recalled, and source of awareness, the actions taken because of a recall remain consistent with previous waves. The most common activity is still to return/ exchange the product (31%).

Attitudes towards product recalls

There has been a downward trend in the UK public seeing product recalls/ other safety warnings for a consumer product (excluding food, pharmaceutical, vehicle products) in the last two years – from 58% of the UK public in wave one recalling a product recall, 53% in wave two, down to just half (50%) in wave three. This decline may be due to several high-profile national recalls no longer being within the recall time frame.

Figure 24. Awareness of product recalls in the last two years



Q: In the past two years have you ever seen or heard about a product recall or other product safety warning?
Base: All respondents (W1 n=10,230; W2 n=10,296; W3 n=10,187)

Consistent with the previous waves, those under 50 years old are more likely than those over 50 years old to report having seen a recall. Indeed, the trend across age has become stronger – in wave one, 59% of 18 to 29 year olds had seen a recall compared to 55% of those 65+ years old; a difference of only four percentage points. Now, in wave three, the youngest respondents are more than ten percentage points more likely to have seen a recall (56% 18 to 29, 52% 30 to 49, 48% 50 to 64, 45% 65+).

It is specifically young women who are maintaining awareness of product recalls. In all waves, men are generally less likely than women to have seen a product recall in the last two years (56% vs 60% W1, 50% vs 55% W2, 48 vs 52% W3). In wave three, the gender difference is evident across those under 50 years old (50% vs 57%) but men over 50 years old are just as likely as women over 50 to report seeing a product recall (46% vs 47%).

Previously, those who own their own home were more aware of product recalls (W1 59% homeowners vs 57% renters). There is now no difference in awareness across housing tenure (W3 51% homeowners vs 50% renters).

Consistent with previous waves, those with children in their household are more likely than those without children to be aware of product recalls (53% vs 50%)

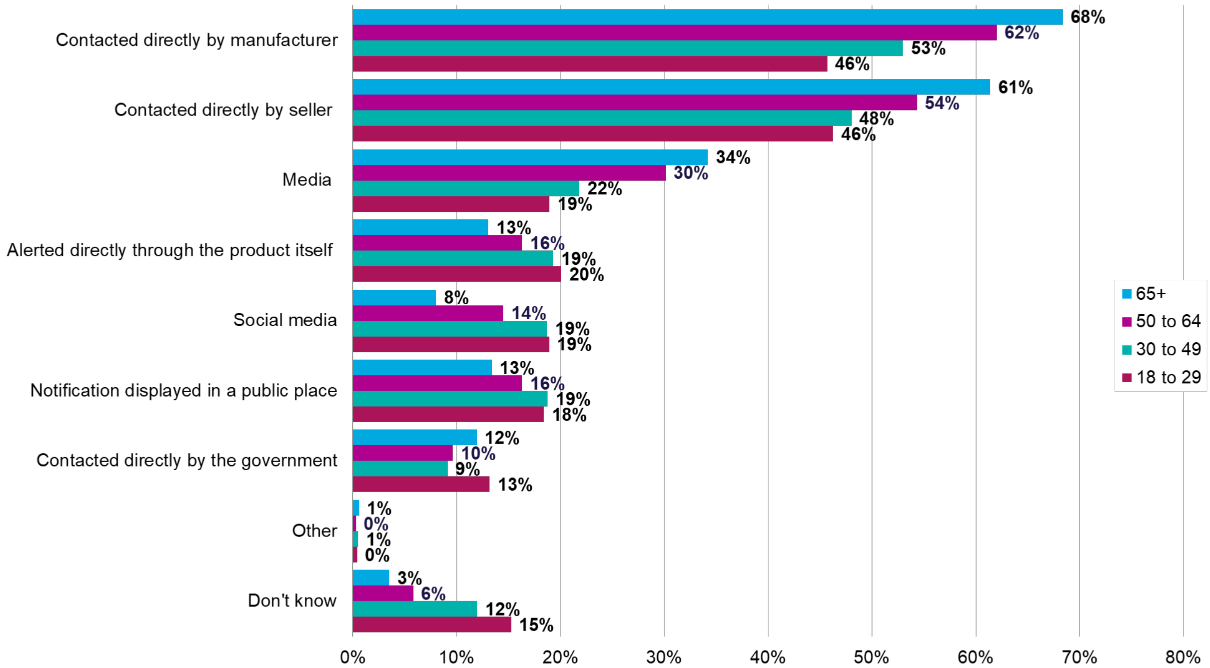
Consistent with previous waves, the offline population are more likely to report not seeing a recall in the past two years (44% W1, 48% W2, 42% W3). This is mostly as they are less likely to be unsure than the general public – only 4% report being unsure if they have seen/ heard about a recall (vs 17% of the general public

Product recall preferences

Consistent with wave one, most of the UK public would like to be contacted directly if a product they own is recalled: 57% would prefer to be contacted by the manufacturer and 52% would like to be contacted by the seller. As in the first wave, there is a clear age trend with those aged 65 and over the most likely to prefer direct contact from either the manufacturer (68%) or seller (61%).

As with general awareness of product recalls, there is a sharp divide by age for how people would prefer to be contacted. Those over 50 years old prefer to be contacted directly by a manufacturer or seller while those under 50 prefer to be alerted directly through the product, on social media, or via a notification in a public place (see figure 25). These age trends are consistent with wave one data. However, in wave three, younger respondents aged 18 to 29 are now the most likely age group to want direct contact from the government (13%, rising from 11% in wave one).

Figure 25. Preferred way to be informed of a product recall notice



Q: How would you best like to be informed about a product recall notice for a product you own? Please choose up to three methods.
Base: All wave three respondents (18 to 29 n=1,899; 30 to 49 n=3,468; 50 to 64 n=2,576; 65+ 2,244)

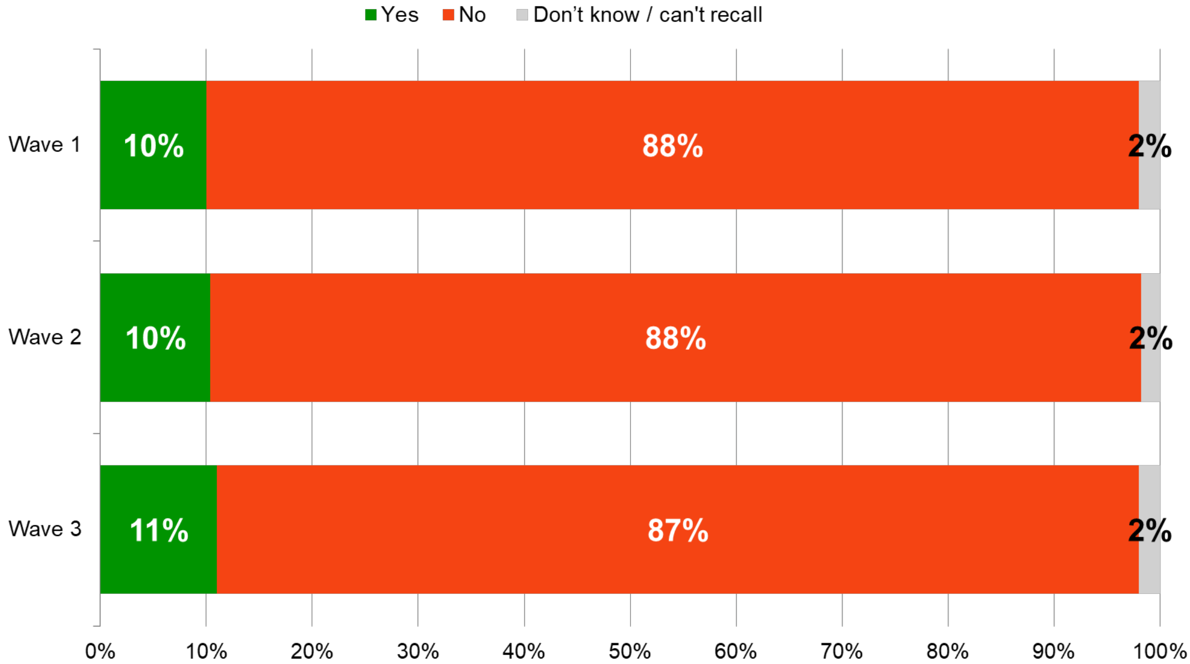
Those with low or medium education levels (both 27%) are more likely than those with a high education level (24%) to want to be notified about product recalls via the media.

People whose first language is not English are now more likely than those who speak English as a first language to want alerts directly from a product (21% vs 17%). In wave one there was no significant difference.

Experience of product recalls

Of those aware of product recalls, the proportion reporting that they have seen one for a product they own in the last two years has remained consistent at around one in ten people.

Figure 26. Awareness of seeing a product recall relating to an owned product



Q: And in the past two years, have you ever seen a product recall notice or other safety warning about something you own?
Base: All who have seen/ heard about a recall (W1 n=6,011; W2 n=5,539; W3 n=5,070)

Compared to wave one, there has been an increase in the youngest respondents being aware of recalls for products they owned – this has risen from 8% of 18 to 29 year olds in wave one to 12% in wave three. There has also been a significant increase in the proportion of BAME respondents who report seeing a recall for something they own (15% W1, 21% W3), predominantly driven by the younger age groups - 14% of BAME 18 to 29 year olds in wave one saw a product recall for something they owned compared to a quarter (26%) in wave three.

As noted in previous reports, those with high education levels tend to be most aware of product recalls in general while those with low education levels are more likely to have seen a recall for something they own. This gap in awareness has widened – now, 15% of those with low education attainment are aware of a recall for something they own, compared to only 10% of those with high education.

Those with children in the household are more likely than those without children to have seen a product recall for something they own (16% vs 9%) – this is also a significant increase from previous waves (13% of those with children in household in both wave one and two)

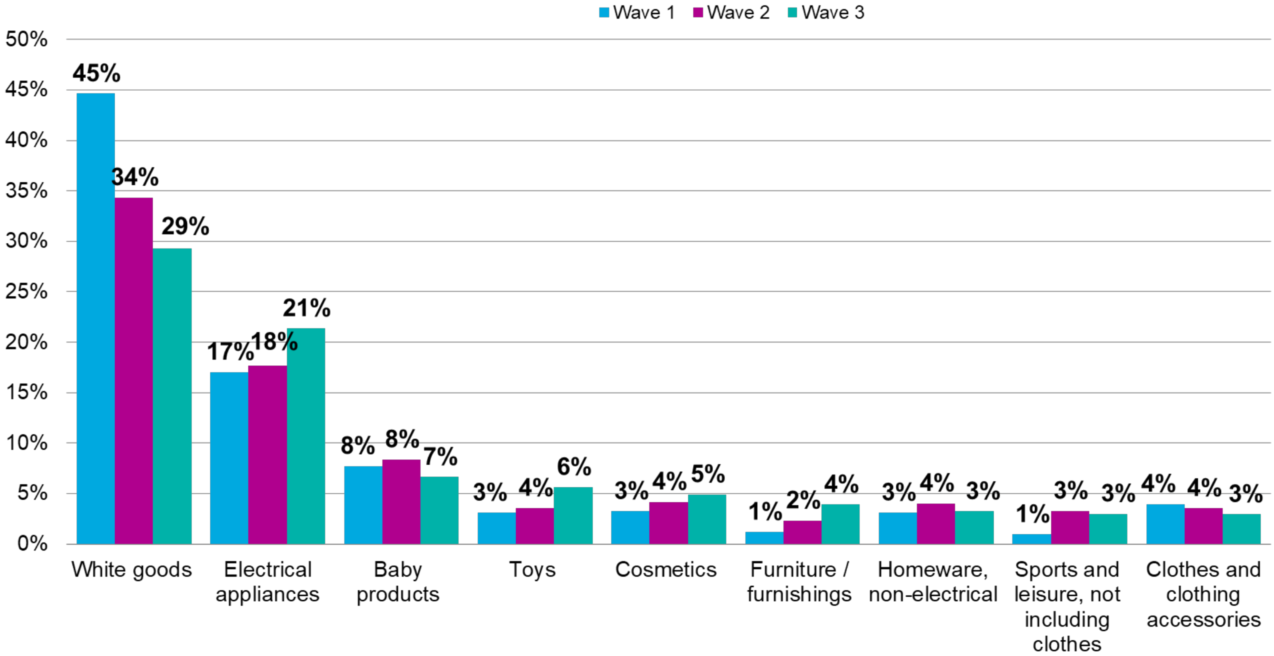
There has continued to be a significant fall in the proportion saying their white good had been recalled – only three in ten (29%) now report this, compared to 45% in wave one. This may be due to a series of high-profile white good recalls now being more than two years ago and no longer within the recall period for the tracker.

However, in wave three, there have been slight increases for seeing recalls of other items – including electrical appliances (17% W1, 18% W2, 21% W3), toys (3% W1, 4% W2, 6% W3), and furniture/ furnishings (1% W1, 2% W2, 4% W3).

In previous waves, BAME respondents have been more likely than white respondents to have seen a recall for electrical appliances (27% vs 15% W1, 25% vs 16% W2). However, the number of white respondents who have seen a recall for an electrical appliance has risen – which means that the proportion who have seen a recall for these items is now on par with the proportion of BAME respondents (21% white, 22% BAME).

The proportion of those renting their home reporting an electrical appliance being recalled has also risen (16% W1, 22% W2, 28% W3). Homeowners have not noticed an increase in electrical appliance recalls (17% W1, 16% W2, 19% W3), meaning renters are now significantly more likely than homeowners to report this.

Figure 27. Types of products owned seen in recall notices

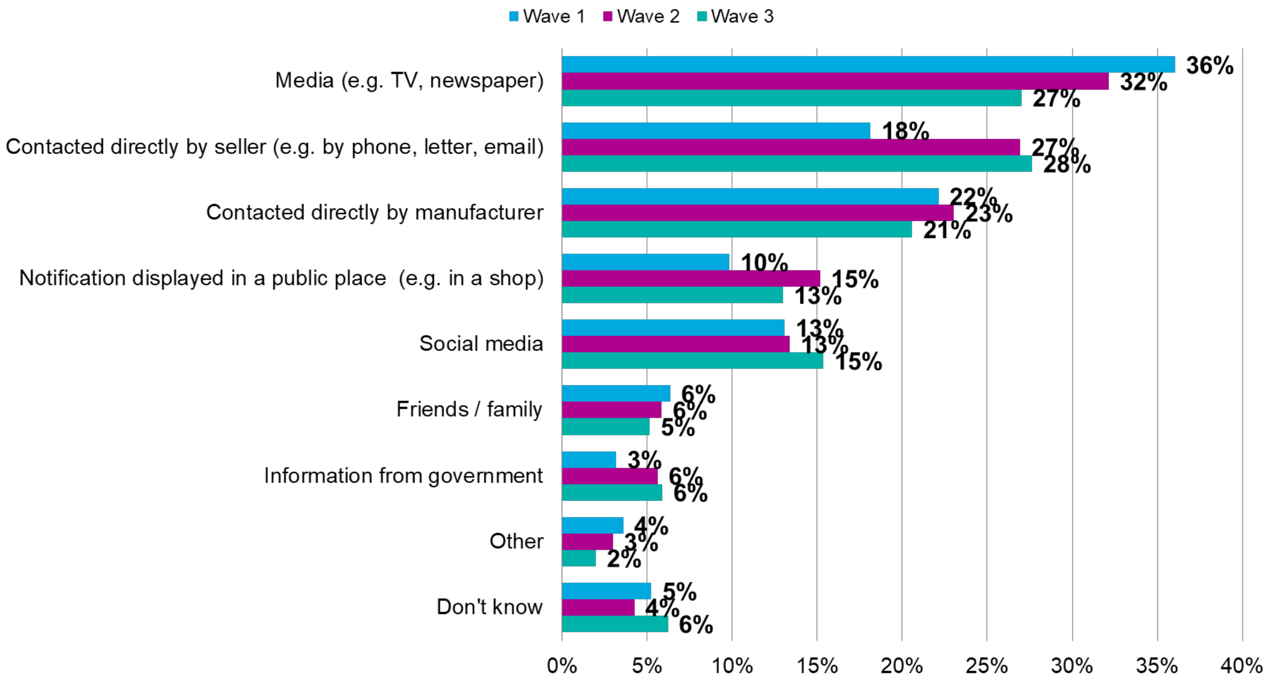


Q: What type of product was it that you saw a product recall notice for?
Base: All who saw product recall notice for something they own (W1 n=620; W2 n=514; W3 n=526)

In terms of where they heard about the product recall, there has been a consistent fall in the proportion saying they saw something in the media (36% W1, 32% W2, 27% W3), although those aged 65 and over are still most likely to find out about a recall in this way (41%). With younger respondents driving the increased awareness of product recalls, it is interesting to note that there has been an increase of younger respondents finding out about recalls through social media or the government. In wave three, the proportion of 18 to 29 year olds finding out about product recalls via social media has doubled since wave one (11% W1, 20% W2, 22% W3), and the proportion finding out directly from the government has tripled (4% W1, 5% W2, 13% W3).

Those who saw a recall for their electrical appliance are most likely to have been contacted directly by the seller (46%). The fall in hearing about recalls via the media is also evident here, with only one in seven of those who reported an electrical appliance recall now finding out via TV/ newspapers (32% W1, 22% W2, 16% W3).

Figure 28. Source of recall awareness



Q: Where did you hear about the product recall notice, or other safety warning?
Base: All who saw product recall notice for something they own (W1 n=620; W2 n=514; W3 n=526)

White respondents are much more likely than BAME respondents to be contacted directly by the seller about a recall (30% vs 21%), while BAME respondents find out about recalls from 'informal' sources like social media (11% vs 31%) or family/ friends (4% vs 11%)

Those with children in the household are less likely than those without children to find out about recalls via the media (18% vs 33%)

Despite the changes in type of product being recalled and sources of recall awareness, there has been little change in what actions people take as a result of a recall. The most common activity remains returning the product for a refund/ exchange (31%), a quarter follow the manufacturer's guidance for safe use (23%) and a fifth allow the manufacturer to make modifications (21%). These are all in line with previous waves.

As before, those who are contacted by the manufacturer are the most likely to allow the manufacturer to make modifications (40%) while those contacted by the seller are the most likely to return it for a refund/ exchange (43%). There has been a fall in the proportion of people with recalled electrical appliances allowing the manufacturer to make modifications (28% W1, 18% W2, 16% W3).

Consistent with previous waves, around one in ten did not take any action and continued to use their product as before (10%). The main reason for this is considering the product low risk (26%), although this is closely followed by a quarter of respondents simply not knowing/ recalling why they did not take any action (25%). A fifth of respondents said their recalled product was working and so they thought it was fine to continue using (21%) and one in seven thought there was only an issue if the product was used incorrectly (16%). As similar proportion report that the recall process was too inconvenient for them to go ahead with (16%).

Perceptions and experiences of product registration

Key findings

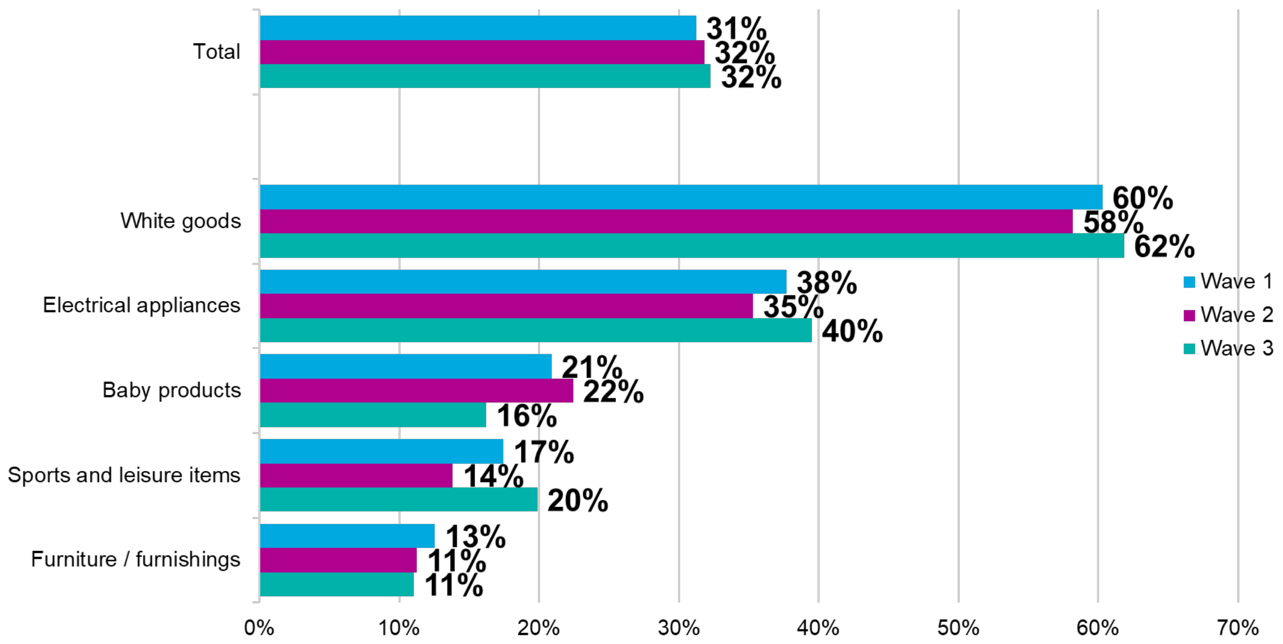
- A third of those who purchase an eligible product register it (32%) and uptake remains highest for white goods (62%).
- Registration for electrical appliances (40%) and sports items (20%) has increased significantly since wave two.
- The most common reason for registering a product is still to validate a warranty (68%).
- The majority of those who register their products do so online (72%), with two fifths (44%) using manufacturers websites and a quarter (26%) using retailer websites.
- Almost all of those who registered a product found the product registration process to be easy (91%). The proportion who report that registering by post was easy has gradually decreased over the waves leading to a significant difference between waves one (94%) and three (78%).
- The most common reason to not register an eligible product that they did not know they could (39%). The proportion stating they did not want to/ did not think it was necessary decreased since wave two (34%, down from 37% in W2).
- Those that do not think registration is necessary continue to say there is no benefit to registration (42%).
- In wave three there is an increase in the proportion stating that they didn’t understand why they should, with one fifth (20%) identifying this compared to 15% in wave two.
- The appetite for clearer guidance remains consistent with wave two – just over half of those who did not register their product in wave three say that clearer guidance would make them more likely to register a product in the future (56%).
- The qualitative research found that registration was attractive based on the type of product and its overall value. Most weigh up the cost and time it would take to repair the item with the original cost and compare this with replacing the product.
- Automatic registration was generally felt to be appealing but some were concerned about how their data might be used.

Experiences of registering an eligible product

Those who had purchased an eligible product in the last six months were asked about their experiences of the product registration process – the process of providing their details and the product’s details to the manufacturer when they bought it so that the manufacturer can contact them if a safety issue is later identified with that make/ model. Eligible products include electronic appliances, selected baby products, white goods, selected furniture/ furnishings, and selected sports/ leisure equipment. A full list can be found in the technical report.

In line with wave one and wave two, around a third of individuals who bought an eligible product registered it (32%) and uptake remains highest for those who have purchased a white good (62%). Two fifths of those who bought an electrical appliance registered it (40%), a significant increase on wave two (35%). Similarly, an increase in registration can also be seen among those who bought an eligible sports and leisure item, with one fifth (20%) reporting they registered it, compared to 14% in wave two. One in six (16%) of those who bought baby products registered them and only one in ten of those who bought eligible furniture/ furnishings (11%) did the same.

Figure 29. Proportion who registered product, by product category



Q: Product registration involves providing your details and model details to the manufacturer when you bought it so that they could contact you if a safety issue was later identified with your make/model of product. Did you register the [product] when you bought it?
Base: All who purchased an eligible item in the last six months: total (W1=3,425; W2=3,120; W3=3,307), product asked about: electrical appliances (W1=1,039; W2=1,235; W3=1,021), baby products (W1=292; W2=107; W3=298), white goods (W1=674; W2=676; W3=661), furniture/ furnishings (W1=798; W2=668; W3=780), sports and leisure items (W1=622; W2=434; W3=547)

Consistent with waves one and two, those with high education levels are generally less likely to register their product than those with medium or lower education levels. Just under three in 10 of those with high education levels registered their product (28%), compared to over a third of those with medium (34%) or lower education levels (35%) – reinforcing the perception that education is not a barrier to product registration.

Respondents living with a disability are more likely to report they have registered an eligible product (37%), compared to those without a disability (30%).

Those with children in their household are most likely to report they have not registered an eligible product (63%), compared to 58% of those without children in their household.

As in previous waves, there continues to upward trend by age. In wave three, a fifth of 18 to 29 year olds registered their product (22%), over a quarter of 30 to 49 year olds (25%), a third of 50 to 64 year olds (38%) and almost half of those aged 65+ (49%). As discussed in wave one and two, this may in part be due to the types of product purchased across age – for example, those aged 18 to 29 are the least likely to purchase white goods (8%).

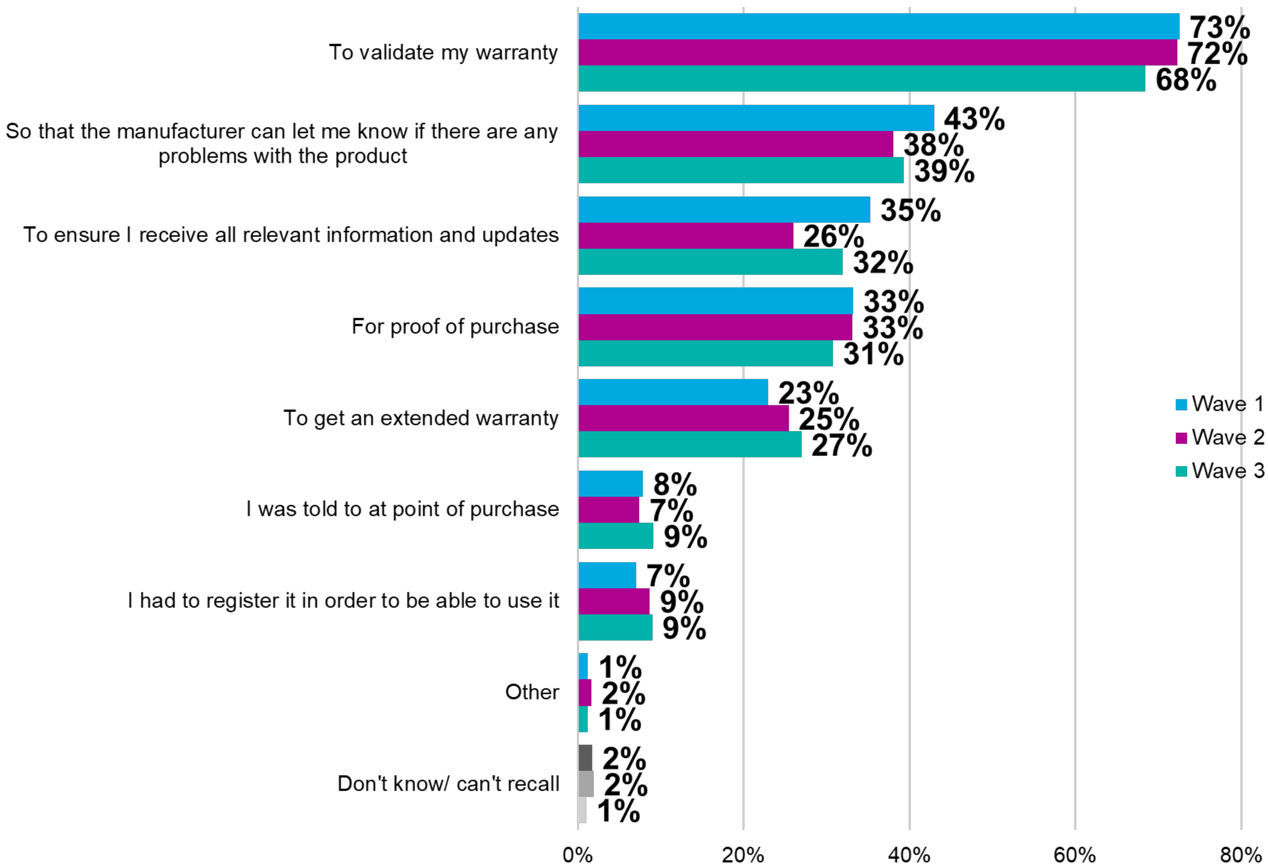
That being said, similar to wave one and two, younger respondents who were asked about white goods are still less likely to register them than any other age group who made the same purchase (41% 18-29, 51% 30-49, 64% 50-64, 81% for those aged 65+) – thus the lower levels of product registration amongst younger respondents are not solely due to the categories of product purchased.

Linked to this, those who live in rented accommodation are less likely than those who own their home to report registering a product (25% compared to 37% respectively). This intersects somewhat with age of respondent, as those aged 18-49 are more likely to live in rented rather than owned accommodation. Despite this, even among 18-29s, those who own their home are more likely to report registering a product (29%) compared to those who live in rented housing (19%).

It remains that the most commonly cited reason for registering a product is to validate warranty (68%), consistent wave on wave. Product safety is a consideration, a fifth report they register their products so that the manufacturer can let them know if there are any problems (39%), as in wave two, this still sits significantly below the proportion who reported this in wave one (43%).

Those aged 65 and over are most likely to report doing so they can be notified of any problems by the manufacturer (47%), compared to 25% of 18 to 29 year olds. This is also the case when validating warranty: 80% of those aged 65 and over register their products to do this, compared to 45% of 18 to 29 year olds. Indeed, it remained that there is an upward trend for registering a product to validate the warranty, with identification incrementally increasing (45% 18-29, 59% 30-49, 75% 50-64, 80% 65+).

Figure 30. Reasons for registering a product



Q: Which, if any, of the following are reasons you registered the [product]? (Please select all that apply)
Base: All who registered their eligible product (W1=1,044; W2=972; W3=1,047)

Respondents living with a disability are more likely to report registering a product so the manufacturer can notify them of any problems (45%) compared to 36% of those without a disability.

Those who have purchased white goods are most likely to report registering their product to validate their warranty (78%). Baby products are the only exception here, where– half (51%) of the respondents who reported purchasing eligible baby products registered the product so the manufacturer could contact them, although this is closely followed by warranty validation (49%).

Figure 31. Top three reasons for registering a product, by product category (wave one and two figures in brackets)

White goods	Electrical appliances	Baby products*	Sports and leisure items	Furniture/ furnishings
To validate the warranty **78%** (W1 82%; W2 81%)	To validate the warranty **64%** (W1 70%; W2 68%)	So the manufacturer can let me know if there are any problems **51%** (W1 45%)	To validate the warranty **59%** (W1 64%; W2 62%)	To validate my warranty **65%** (W1 59%; W2 64%)
So the manufacturer can let me know if there are any problems **44%** (W1 51; W2 44%)	To ensure I receive all relevant information and updates **40%** (W1 35%; W2 29%)	To validate the warranty **49%** (W1 63%)	So the manufacturer can let me know if there are any problems **42%** (W1 30%; W2 27%)	For proof of purchase **40%** (W1 28%; W2 39%)
For proof of purchase **30%** (W1 35%; W2 31%)	So the manufacturer can let me know if there are any problems **34%** (W1 40%; W2 35%)	To ensure I receive all relevant information and updates **41%** (W1 42%)	For proof of purchase **34%** (W1 47%; W2 28%)	So the manufacturer can let me know if there are any problems **29%** (W1 33%; W2 34%)

Q: Which, if any, of the following are reasons you registered the [product]?
Base: All who registered their eligible product: electrical appliances (W1=379; W2=433; W3=397), white goods (W1=405; W2=394; W3=410), baby products (W1=60; W3=53), furniture/ furnishings (W1=95; W2=67; W3=84), sports and leisure items (W1=105; W2=54; W3=103)
*In wave two, only 24 respondents had registered an eligible baby item. This group has not been reported on due to small sample size.
Figures in green are significantly higher in wave three than in wave two

Largely, reasons for registration remain consistent across the product types wave on wave, although there has been a significant increase in the proportion reporting they registered electrical appliances in order to ensure they receive all relevant information and updates, from 29% in wave two to 40% in wave three.

Three quarters (72%) of those who register their products do so online. Of this group 44% use the manufacturers website and 26% use the retailers website. Under one in ten report registering a product through an app (8%), or by phone (7%). All remain consistent wave on wave. White goods continue to be the most likely product to be registered over the phone (16%). The proportion who register their electrical appliances via an app increased between waves two (8%) and three (13%), meanwhile those who bought furniture / furnishings are less likely in wave three (2%) to state they registered by post compared to in wave two (11%). The increase observed between wave one (3%) and two (11%) in those registering a sport and leisure item through the government is not maintained, with wave three levels comparable once again with wave one (1%).

Those aged 18 to 29 are less likely than all other age groups to report registering the product on the manufacturer's website (25% compared to 47% 30-49, 47% 50-64, 45%

65+), however, as in wave one, they are the most likely to report doing this via an app (17%), significantly more likely than those aged 50 to 64 (6%) or 65 and over (2%).

Respondents from a Black, Asian and minority ethnic (BAME) background continue to be more likely to identify using the Trade Association website (5%) compared to white respondents (2%).

In line with previous waves, almost all of those who registered their eligible product found the process easy (91%), with 53% reporting it was very easy and 38% reporting it was fairly easy. However, the proportion who report that registering by post was easy has gradually decreased over the waves (94% W1, 87% W2, 78% W3), leading to a significant difference between waves one and three.

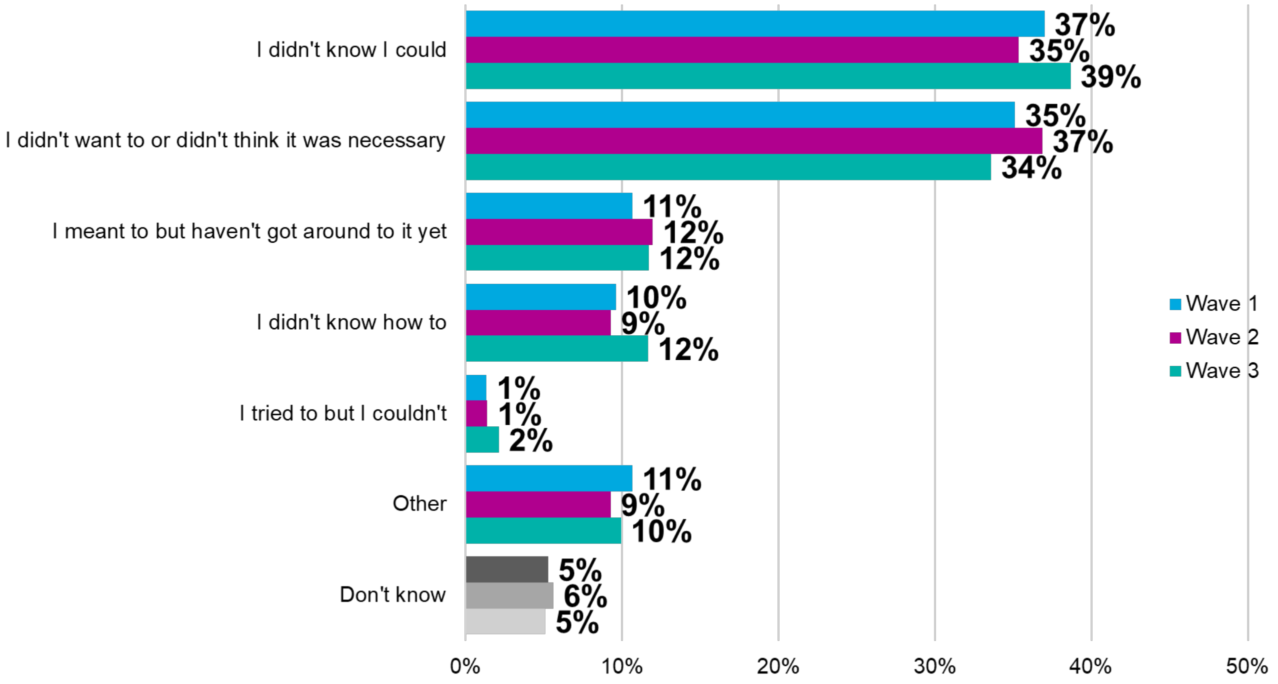
Reasons for not registering products

For those who have not registered an eligible product, the most common reasons in wave three is that they did not know they could (39%) or that they did not want to / didn't think it was necessary (34%). The latter saw a small but significant decrease since the last wave (37%), meaning that not knowing they could became the most commonly identified reason. Around one in ten meant to register their product but had not done so yet (12%) or did not know how to register it (12%), both figures are consistent with wave two.

Younger respondents in wave three have the least knowledge about registering products: two fifths (18%) of 18 to 29 year-olds who didn't register a product stated that they didn't know how, and over half (52%) stated that they didn't know they could – both proportions are significantly higher than any other age group

There is no link between educational attainment and knowing how to register a product. The same proportion of respondents with a low educational attainment stated that they did not know how to register a product as those with a high level of attainment (13% and 14% respectively). However, those with a high level of educational attainment are more likely to state that they didn't know they could (42%) compared to those with a low level of attainment (32%).

Figure 32. Reasons for not registering an eligible product



Q: You said you didn't register the [product] when you bought it. Which, if any, of the following are reasons for this?
Base: All who did not register product (W1=2,093; W2=1,877; W3=1,979)

Respondents from a Black, Asian and minority ethnic (BAME) background who didn't register an eligible product are more likely than white respondents to state that they tried but couldn't (6% compared to 2% respectively).

Those with a disability are more likely than those without to report they didn't register an eligible product because they didn't know how (14% compared to 11%). However, they are significantly less likely than those without a disability to state that they didn't know they could (34% compared 41%).

In wave two, those who purchased furniture/ furnishings, or baby products, are the most likely to say they did not know they could register the item (45%). For those who purchased baby products there was a significant increase in the proportion reporting they tried to register but couldn't between wave two (2%) and three (6%).

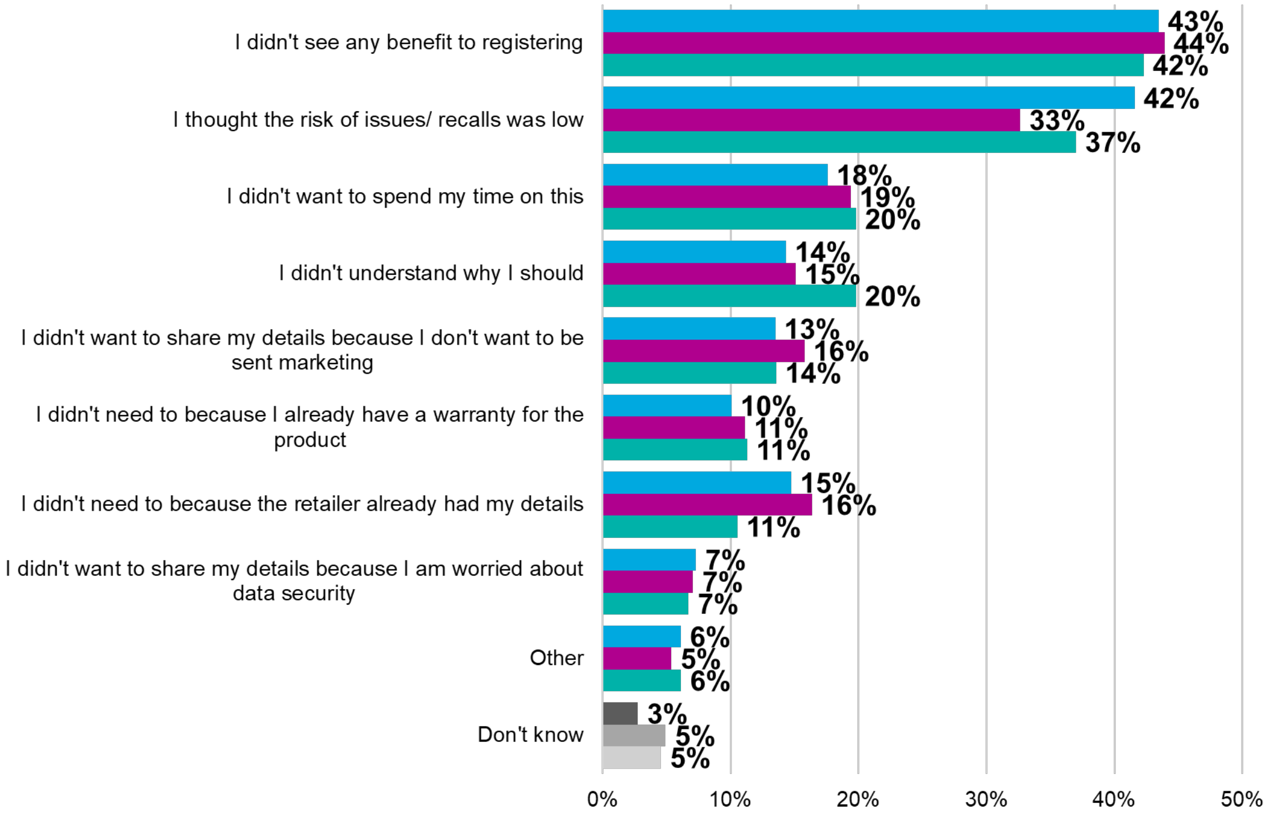
Those who tried to register the product but couldn't[7], this was due to technical issues (38%), while three in ten report that they could not find/remember all required product details (29%) or that they ran out of time (28%).

When those who did not want to register their product or did not think it was necessary were asked why they thought this, the top answer is consistent – not seeing any benefit to doing so (42%). However, in wave three there is an increase in the number stating that

[7] Note: small base (n=40), treat with caution

they didn't understand why they should, with one fifth (20%) identifying this compared to 15% in wave two. This increase was mainly evident among younger respondents, while older respondents remained consistent wave on wave.

Figure 33. Reasons for not wanting to register product/ not thinking registration necessary

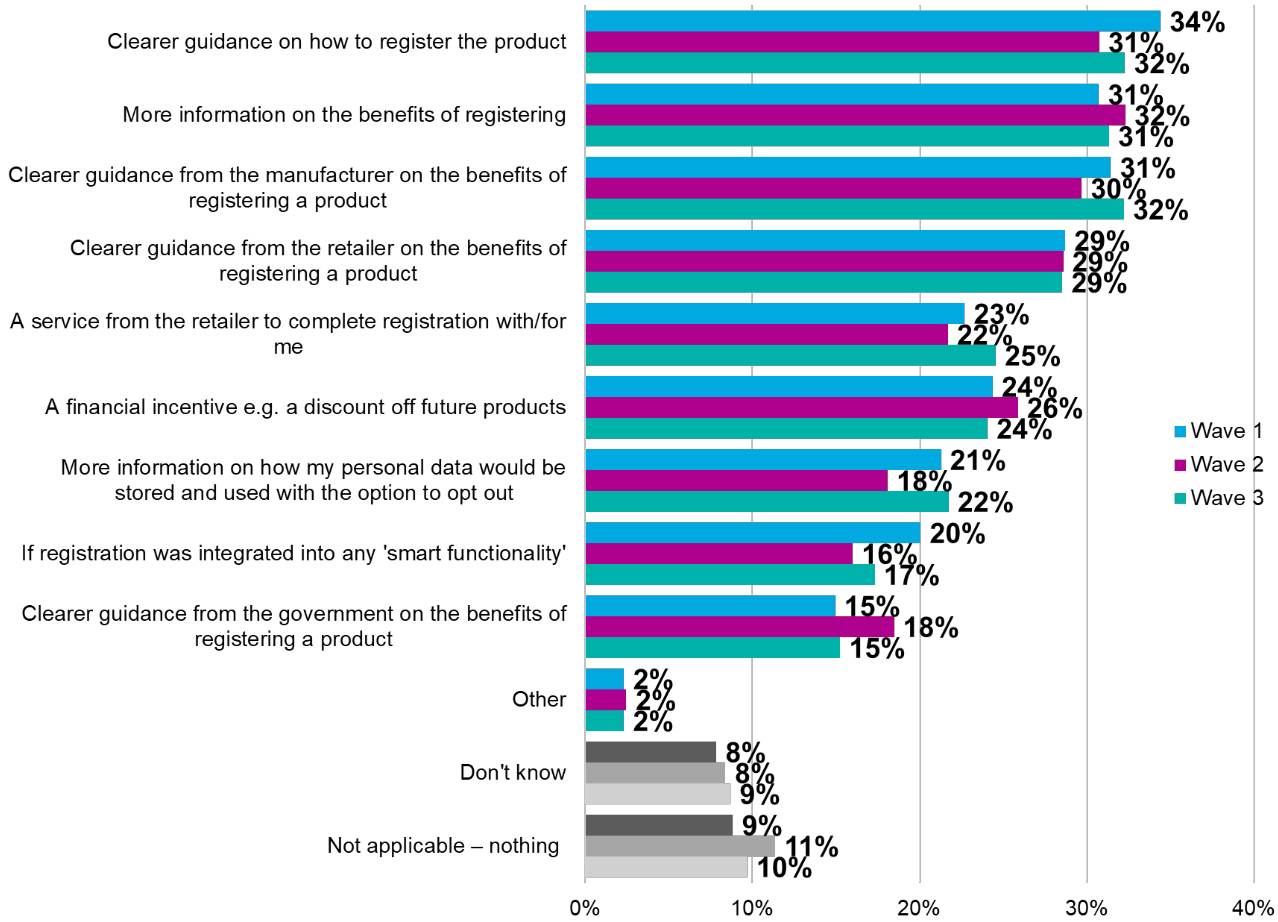


Q: You said that you didn't want to register [product]/ didn't think it was necessary… Which, if any, of the following are reasons for this? (Please select all that apply)
Base: All who did not register product because they did not want to/ didn't think it was necessary (W1=725; W2=679; W3=666)

Overall, there was a decline between waves two and three in those saying they didn't because the retailer already had their details (from 16% to 11%) and this is largely driven by those who had purchased electrical products (17% W1 to 8% W3) or furniture / furnishings (26% W2 to 13% W3).

After declining in wave two, the appetite for clearer guidance remains consistent – just over half of those who did not register their product in wave three say that any clearer guidance would make them more likely to register a product in the future (56% wave three; 55% wave two), although this remains significantly below wave one (60%).

Figure 34. What would encourage registration of products in future



Q: Which, if any, of the following would make you more likely to register your products in the future?
Base: All who did not register their eligible product (W1=2,093; W2=1,877, W3=1,979)

Those who bought a white good that they did not register are less likely, on average, to report that they would like clearer guidance on how to register the product (24%) or that they would like clearer guidance from the retailer on the benefits of registering a product (20%). Comparatively, those who have purchased furniture or furnishings are more likely than average to identify that they'd like clearer guidance from the retailer on benefits (32%).

Overall, two fifths (42%) identified that they would want more information before registering. While this is in line with previous waves, compared to wave two there has been a slight increase in the proportion stating they would want more information on how their personal data would be stored with the option to opt out (from 18% to 22%).

As seen in previous waves, younger respondents are the most likely to support incentives for future registration of products, including a particular desire for financial incentives (35%), guidance on how to register the product (38%), more information on the benefits (31%), or guidance from the government on what the benefits are (32%). This suggests that advice and guidance is still valuable for those who have had fewer opportunities to register products over a lifetime, even if it is now less necessary for the UK public overall.

Qualitative findings on registration

The idea of registration was attractive to participants in the qualitative research, though the overall appeal was dependent on the price and type of the product. If a product is considered to be expensive, participants would be more likely to want to have it registered, as there would be significant cost implications if there was an issue with the product.

This was also the case for electrical items or white goods, where there could be a safety implication if there was an issue with the product and it needed to be recalled e.g., gas leaking from a hob or a fridge fire.

Participants commented that they would expect to be offered product registration by established brands such as Curry's or John Lewis, as they have the infrastructure to successfully implement communications about product recalls and / or warrantees.

"John Lewis automatically provides a product guarantee which I like as it saves me from registering. Anything high value or that I depend on I'll register online with the manufacturer too" (40+, ABC1)

"I always register bigger more expensive items and items I use frequently. It's a guarantee for me that they will intervene if something happens with the product" (18-40, 2CDE)

"Depends on what the item is. If it's expensive then I would register it" (40+, 2CDE)

"John Lewis automatically provides a product guarantee which I like as it saves me from registering. Anything high value or that I depend on I'll register online with the manufacturer too" (40+, ABC1)

Participants commented that registering the product would make it easier for them to keep note of the warranty date of their product, this gives consumers peace of mind when using the product, as they know that it can be fixed without any additional cost.

Some participants had already registered a product previously and had a positive experience.

"Remember registering my Bosch tumble dryer, thinking that if there is a safety issue (I think Hotpoint had an issue with dryers catching fire) then they could easily contact me." (18-40, 2CDE)

"Product registration has always been safety for me as my first-hand experience when we moved into our own place, we had many issues resolved due to items being registered" (18-40, ABC1)

As previously mentioned, participants expected that registration would be more likely for more expensive items or for products purchased at more reputable retailers. They also expected product registration to take place online rather than in store due to the ease - as they are already sharing contact information for the delivery service. Furthermore, many expected to receive email confirmation of registration included within the confirmation of purchase email. This email could also outline the benefits of registration e.g., maintenance fees, the length of the warranty and where personal details are stored.

"I'll register some higher value products but I'm not going to register anything that probably cost less than £50" (40+, ABC1)

"I bought a Hotpoint washing machine, registered it -it was recalled, and I got a bigger, better machine as a replacement" (40+, 2CDE)

Though there are many benefits to registering products, some participants were concerned about data protection, specifically whether their details would be used for marketing purposes without their consent. Many had previous experiences of their contact details being misused so they are now more wary of sharing these.

Participants would like clarity on who holds their information e.g., the manufacturer, the retailer or a third party, so they can make an informed decision about whether to share their details. But overall participants felt that the advantages of registering a product (safety, ease) outweighs the disadvantages (potential issues with spamming).

"I am reticent to register particularly lower cost items because although I'm not some paranoid conspiracy nut, I despise the way companies do play fast and loose with people's personal information." (40+, ABC1)

"I have also heard of stolen goods and illegally dumped goods being traced back through being registered with companies" (40+, ABC1)

"A lot of the time you feel that companies are trying to gather as much data on you as possible in order to be able to sell that data to third parties" (18-40, ABC1)

Most participants like the choice of whether they would like to register products, so automatic registration was not appealing for all, but participants would be more likely to accept this if they were making large purchases online.

Participants would also like to limit the amount of information they need to share, and only mention their contact details if necessary. Participants would also like the option to opt out of any communications related to the product.

"Confirmation email and an option to opt out from offers from other companies would be good" (18-40, 2CDE)

"I would prefer that [automatic registration], but only if they don't share my details with them (e.g., only an email address, not my name or age" (18-40, ABC1)

"Automatic registration can be a good thing, as I sometimes don't get round to registering the item" (40+, 2CDE)

Conclusions

This report represents the third wave of tracking the UK public's perceptions and experiences within the product safety policy area. The three waves of data provide a valuable insight into the UK public's experiences of product safety from before the COVID-19 pandemic, during lockdowns and restricted activity, and now during the loosening of restrictions.

Although much of the UK public continue to believe the UK's system for regulation ensures products are safe, uncertainty is rising. Awareness of the OPSS has broadly risen, but trust in UK government departments (including the OPSS) has fallen, driven by wider shifts in sentiment around the government due to recent events.

Despite this fall in trust, the UK public continue to think that the government is most responsible for *setting* product safety requirements, although the majority do not expect the government to ensure that products *meet* these requirements. Many report feeling that they can only trust a few organisations, like healthcare professionals or some consumer protection organisations, relying instead on instincts and their own research to evaluate a product's safety.

The COVID-19 pandemic led to a growth in the amount of online shopping and, although overall rates have dropped, over half of consumers continue to shop online, which may have led to wider attitudinal and lifestyle changes. The UK public are less aware of their consumer rights than they were before and continue to feel that some online marketplaces are too 'risky' to buy from. Consumers who purchase items via online marketplaces are also now split on whether the seller or manufacturer is responsible for ensuring product safety.

The majority of consumers continue to be comfortable purchasing second hand items, although this does vary according to product type and how the item is purchased. As with online shopping, only half are aware of their consumer rights if a product they purchase is unsafe, although second hand shoppers are much more certain that the seller is responsible for ensuring safety. Linked to this, the most common way of checking if a second-hand product is safe is by investigating the seller's reviews – checking the actual product itself is secondary to the seller's reputation.

Only one in ten consumers who purchased a product in the last six months saying they experienced a safety issue of some kind. Behaviour is also unchanged from previous waves as seven in ten of those who faced a problem took action of some kind; most replacing/ exchanging the item.

General awareness of product recalls is falling, potentially due to a series of high profile recalls now being more than two years ago and recall of those dwindling accordingly. However, consumers finding out about recalls for products they own from the media has risen. With the variation in media habits across the UK public, there is a risk that those who own a recalled product are not being made aware – older respondents have maintained awareness of recalls via the media, but all other age groups have moved away from this channel. This is an area for further work – although many would prefer the seller to directly contact them about a recall for a product they own, the proportion who report this happening has fallen.

Further work should also be done to improve understanding of the benefits of product registration. Around a third continue to think that product registration is not necessary (although this has fallen slightly) and many continue to see no benefit to registering. Automatic registration generally appealed to participants, but consumers continue to have concerns about potential data misuse.

Appendix A: Topical spotlights

Fireworks

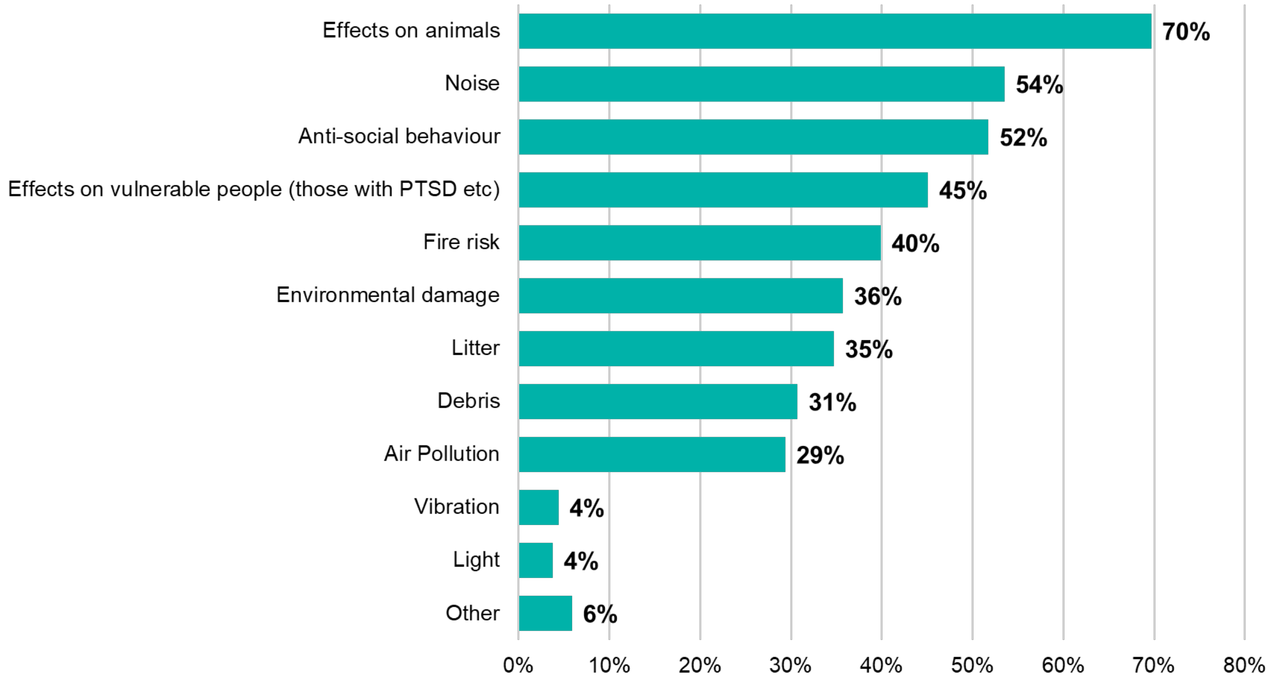
Key findings

- The majority of adults enjoy fireworks (56%), this increases to 60% among younger respondents (aged 18-29).
- Those who don't enjoy fireworks are most likely to state the effect of fireworks on animals (70%), as a reason to not enjoy fireworks.
- A minority (17%) of respondents said they will/ did attend a fireworks display in Autumn 2021, this increased to 28% among respondents who live with children.

While there is a slight majority in the proportion of respondents who enjoy fireworks (56%), this is compared to 41% who don't like fireworks. Younger respondents have higher levels of enjoyment, with 18-29 year olds (60%) having the highest levels of enjoyment and those aged 65+ (49%) having the lowest levels of enjoyment.

Among those who do not fully enjoy fireworks, the effect on animals is reported as the top reason for not enjoying them (70%), with women (74%) reporting this at a greater rate than men (65%). Women also dislike the noise at a greater rate than men (58% vs 48%) and the effects on vulnerable people (51% vs 39%). The only reason which men report at a greater rate than women is anti-social behaviour around fireworks (55% for men vs 49% for women).

Figure 35. Reasons for not enjoying fireworks



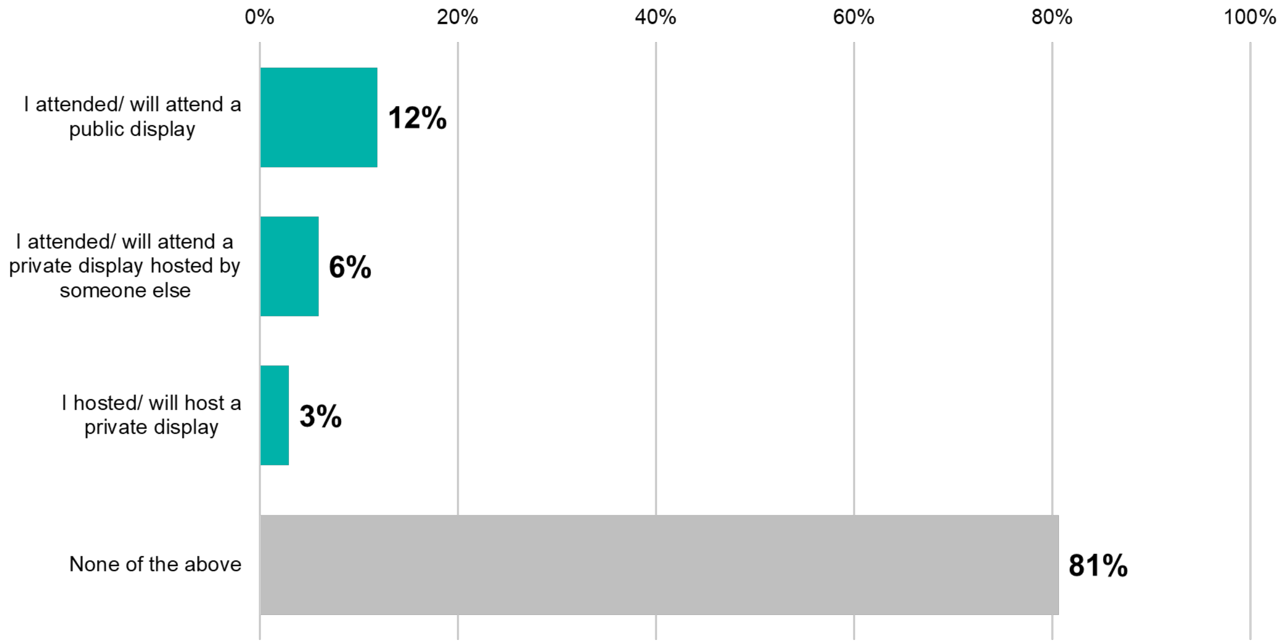
Q: What is it that you do not like about fireworks?
Base: All in fireworks section who don't completely enjoy fireworks (5,161)

Respondents living with a disability are less likely to enjoy fireworks than those without a disability (52% vs 59%) and more likely to say they don't like them (47% vs 38%). Those with a disability report that their reason for not enjoying fireworks is the effect on animals (75%), followed by the noise and anti-social behaviour (both 58%). They are significantly more likely to not like fireworks due to the effects on vulnerable people (55%) than respondents who do not have a disability (41%). These figures are in line with wave one.

The vast majority of respondents (81%) said they did not/ will not attend a fireworks display in autumn 2021, however 17% said they attended/ will attend a display. In terms of the kinds of displays respondents attended/ will attend, 12% said a public display, 6% said a private display hosted by someone else and 3% said a private display which they hosted. Due to the previous wave of data collected on this question being during a national lockdown, the data is not consistent. However, there is a notable increase in respondents attending displays of any kind in wave three, with the exception of respondents who reported hosting private displays which remains consistent from wave one to wave three (3%).

Those with children in their household are more likely to attend a display of any kind (28%) than those without (13%), with attending a public fireworks display being the most popular option (18%). BAME respondents are also more likely to attend a fireworks display, with 24% saying they did/ will attend a fireworks display compared with 16% of White respondents.

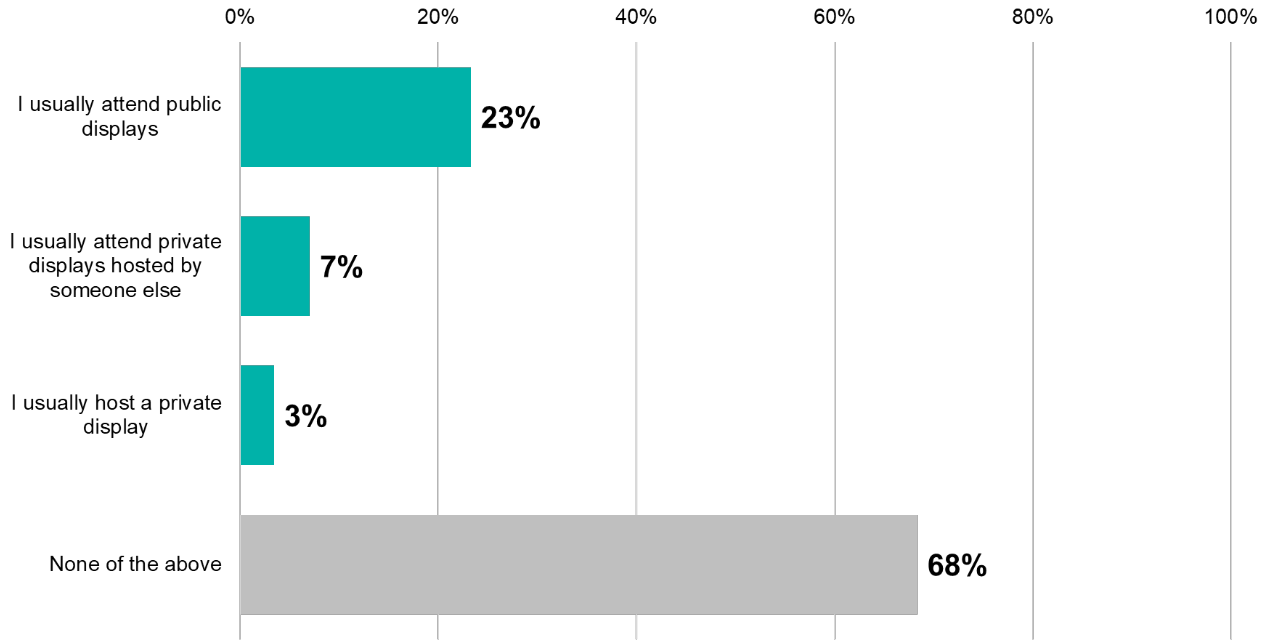
Figure 36. Firework display attendance – 2021



Q: Thinking about fireworks displays this autumn (e.g. for Diwali, Bonfire night), which of the following apply to you?
Base: All in fireworks section (n=6777)

When compared with respondent answers to whether they would attend fireworks displays normally, a larger proportion say they do attend public displays (12% attending in autumn 2021, to 23% usually). This is a reduction from the number of respondents who said they usually attend fireworks displays in wave one (28%). Due to the previous wave being asked during a COVID-19 lockdown, it could be that more respondents would have considered going to a fireworks display because they had limited options to do so.

Figure 37. Firework display attendance usually

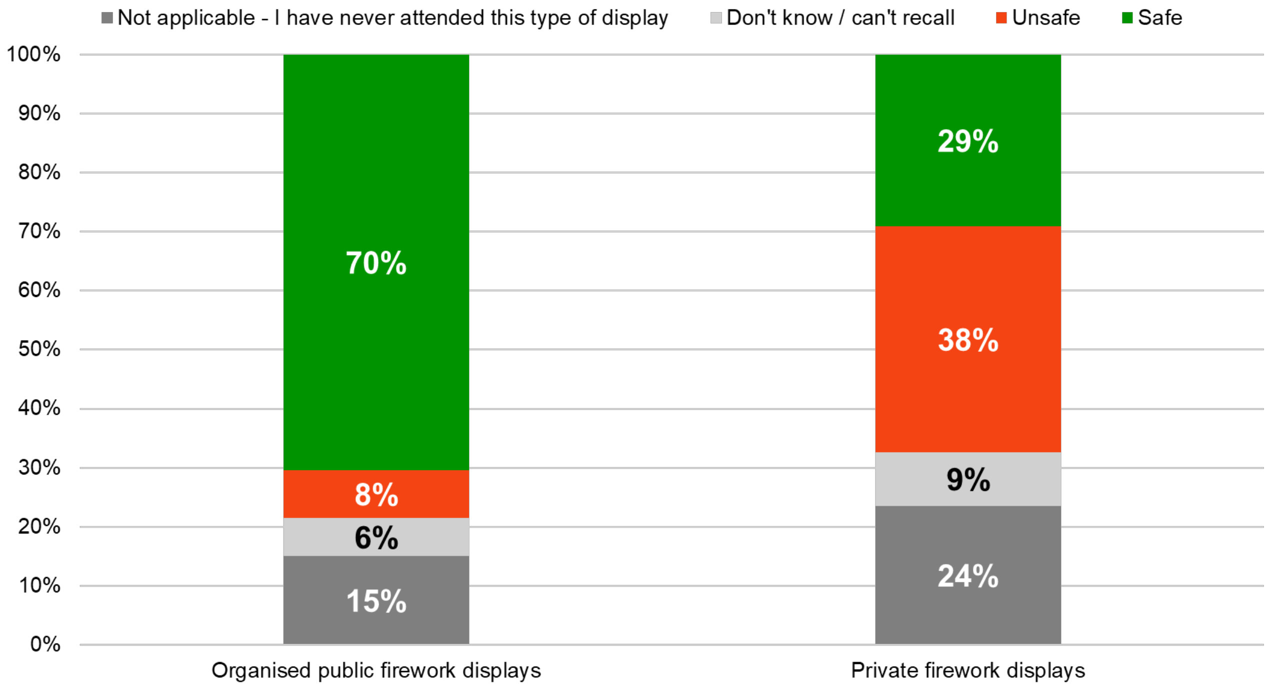


Q: And thinking about what you usually do for autumn firework displays (e.g. for Diwali, Bonfire night), which of the following apply to you?
Base: All in fireworks section (n=6777)

Half (51%) of respondents who purchase fireworks for a private display do not take noise into account, compared with 46% who report they do take noise into account.

Public displays are considered to be safe, with 70% of respondents saying that the last public fireworks display they attended was safe, compared to 8% saying unsafe. This is in comparison to private displays, for which more respondents say they are unsafe (38%) than safe (29%).

Figure 38. Safety of last firework display attended



Q: Thinking about the last fireworks display you attended of each of the following types... Overall how safe, if at all, do you think the fireworks display was?
Base: All in fireworks section (n=6777)

When asked what made the private fireworks display they attended unsafe, respondents mostly cited that fireworks are generally unsafe/ unpredictable (52%), followed by the fact that fireworks were set off too close to people (44%), and that there were too many attendants (18%). A few respondents said that someone was hit by a firework (6%) at their private display and 4% reported that something caught fire.

At a total level, 4% of respondents have bought fireworks in the past three months. The most common place to have purchased them from was the supermarket (online or offline) (43%). This was followed by a high street retailer and specialist fireworks shop (both 16%). The most common place to store the fireworks once they had been bought was in the home (74%): inside the house (35%), in a garage (22%) or in a shed (21%).

The majority of respondents who had bought fireworks in the past three months did report reading the instructions at some point (77%). This figure rises for respondents with children in the household (82%), compared to 69% of those without children in their household. Over one in ten (13%) said they didn’t read the instructions at all.

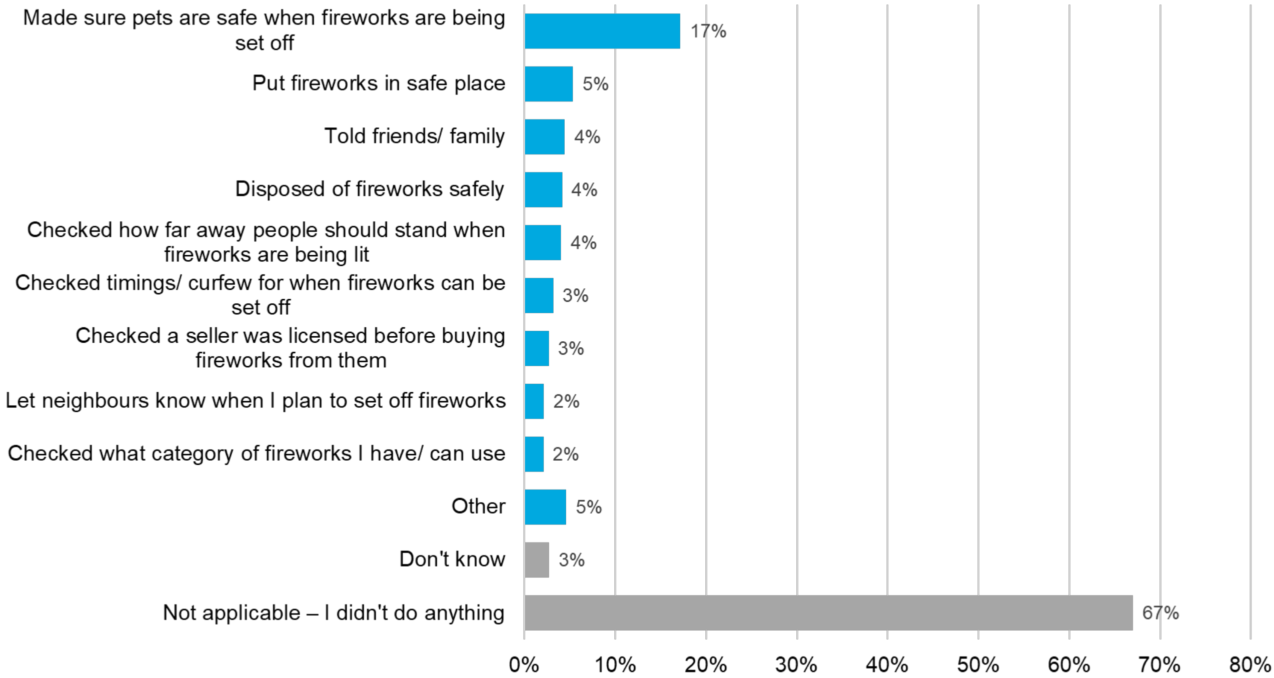
Over a third (37%) of respondents looked for any safety advice about fireworks. The most common advice searched for was how far away people should stand when fireworks are being lit (23%), followed by general instructions on how to use fireworks safely (20%) and how fireworks should be safely stored (17%). More than half of respondents have never looked up any safety advice about fireworks (54%), while the remaining 9% could not recall.

Campaign

When shown an advert from a recent campaign by OPSS, 15% of respondents report they had seen similar adverts about firework safety from the OPSS or government in the last few months. This is higher than wave one, where 12% of respondents reported awareness in a similar question. Recognition is higher among women (17%) than men (13%). It is also higher among respondents with children in the household (18%), compared with those without children in their household (14%).

The most common place for respondents to have recently seen adverts about fireworks safety is on Facebook (38%), followed by on TV (27%), in newspapers (13%) and on news websites (10%). Three in ten of those who saw the campaign (30%) took some form of action, with making sure pets are safe when fireworks are being set off (17%) being the most reported action.

Figure 39. Actions taken as a result of seeing fireworks campaign



Q. You said that you'd seen adverts about firework safety recently...Which, if any, of the following places did you see them?
Base: All aware and allocated to fireworks campaign (n=1091)

Magnets and batteries

Key findings

- The majority of adults report concern around toys with magnetic pieces (69% fidget toys; 64% construction toys; 60% desk toys). The majority (71%) of respondents state they would be concerned with a toy that contained a button or coin battery

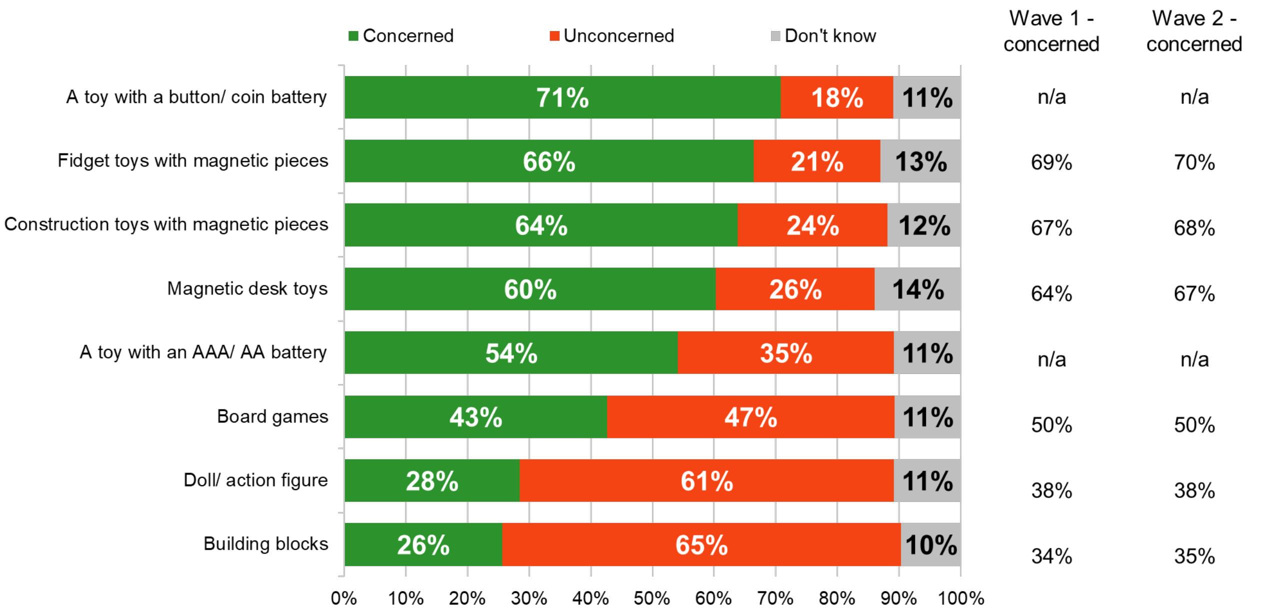
- Reported purchase behaviour for magnetic toys is relatively low: one in ten (10%) of respondents stated that they had purchased any items with magnetic pieces in the last six months. One quarter (25%) state they had purchased any items that contained button batteries.
- Those who have purchased a product with a button battery are most likely to identify battery life (39%) as being important to them when making a purchase. However, safety considerations are comparable - one third (33%) state whether the battery compartment is secured.
- A very small minority of the UK public (2%) report that someone in their household has ever swallowed or nearly swallowed a button battery.

Two-thirds (66%) of adults would be concerned about whether fidget toys with magnetic pieces are safe for a child under five to play with. Slightly fewer feel the same way about construction toys with magnetic pieces (64%). These figures represent a small, but statistically significant, decline in concern compared to wave one and two (figure 40), however this is a pattern seen across all toy types asked about, not only those with magnetic pieces. Building blocks (26%), doll/action figures (28%) and board games (43%) are the least concerning toys for a young child to play with.

When thinking about toys with magnetic pieces, older age groups concern remained consistent with one wave: 78% of those aged 65 and over are concerned about fidget toys and 75% of the same group are concerned about construction toys. This was also the case for those aged 50 to 64 (72% fidget toys, 69% construction toys). Comparatively, all younger age groups saw declining concern.

Wave three also asked around concern for a child playing with items that use batteries. The majority (71%) of respondents state they would be concerned with a toy that contained a button or coin battery. Comparatively, significantly fewer would be concerned about a child playing with a toy with an AAA/AA battery (54%).

Figure 40. Safety concerns for a child under 5 to play with each item



Q: Thinking about the following types of toy, how concerned or not would you be that they are safe for a child under 5 to play with?
Base: All respondents [in magnets and button battery section] (W1=3,408; W2=4,127; W3=6,795)

As in wave two, there continues to be a gender divide in concern. Women are more likely than men to report being concerned about fidget toys with magnetic pieces (72% vs 60%), construction toys with magnetic pieces (70% vs 57%), and magnetic desk toys (66% vs 54%). This divide was also seen when thinking about toys with a button battery (75% vs 66%) or AAA/AA battery (57% vs 51%).

Those aged 18 to 29 with children in their household remain least concerned about the safety of items for a child under five. Just over half (54%) of this audience report concern about a product with a button battery, much lower than all other age groups[8] (70% 30 to 49, 75% 50 to 64, 82% 65+), and a similar proportion (52%) report concern for fidget toys with magnetic pieces, compared to two thirds of those aged 30 to 49 (67%) and three quarters of those aged 50 to 64. This represents a marked shift in attitude, wave two found limited difference between the different ages of those with children in their household.

Interestingly, parents of a young child up to 5 years old are less concerned about the safety of items than those with children over 18 – two thirds (66%) of parents with children under five are concerned about toys with a button battery, compared to 80% of those with children over 18.

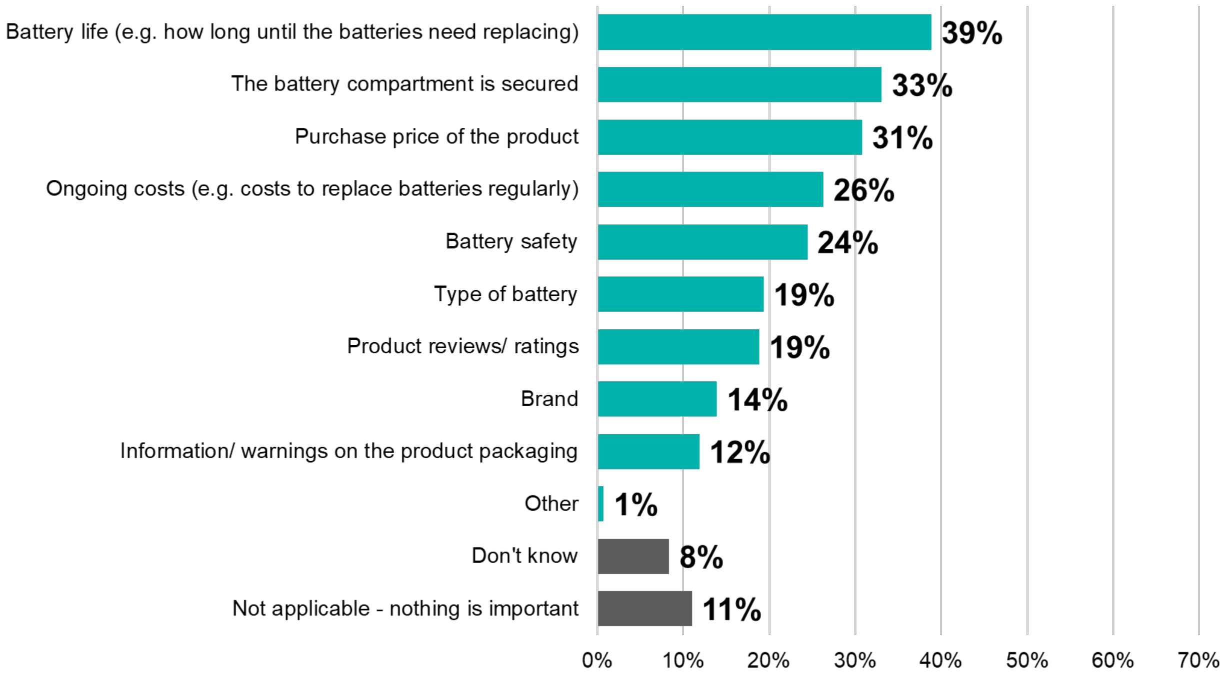
Reported purchase behaviour for magnetic toys remains relatively low: one in ten (10%) of respondents stated that they had purchased any items with magnetic pieces in the last six months, compared to 25% of those who stated they had purchased any items that contained button batteries. Across both product types, younger respondents are more likely to state they have purchased something: 12% of 18 to 29s report purchasing a product with a magnet in, compared to 4% of those aged 65 and over. Likewise, 27% of 18

[8] Note: small base (n=34), treat with caution

to 29s report purchasing a product with a button battery, compared to 21% of those aged 65 and over. A small majority (52%) report that items with button batteries in their home have secured battery compartments, compared to 23% who state they have items with unsecured batteries.

Those who have purchased a product with a button battery are most likely to identify battery life (39%) as being important to them when making a purchase. However, safety considerations are comparable - one third (33%) state whether the battery compartment is secured, and a quarter (24%) identify battery safety.

Figure 41. Important features when buying a product with a button battery



Q: Which, if any, of the following are important to you when buying an item which uses button batteries?
Base: All respondents who bought a battery item [in magnets and button batteries section] (W3=1,692)

Although there is no difference among age groups when thinking about battery safety, those aged 65 and over are most likely to state they consider whether the battery compartment is secured (48%), higher than all other age groups but especially those aged 18 to 29 (21%).

Respondents from a Black, Asian and minority ethnic (BAME) background are less likely to identify whether the battery compartment is secured (25%), compared to 35% of White respondents.

A very small minority of the UK public (2%) report that someone in their household has ever swallowed or nearly swallowed a button battery. Younger respondents (4%) are significantly more likely to report that this has happened compared to all other age groups (3% 30-49, 1% 50-64, 0% 65+).

Possibly linked with age, those with children in their household are most likely to identify that someone has or has nearly swallowed a button battery (4%) compared to 1% of those with no children in their household. Among this group, those with children under 5 are most likely to report this happening (5%), with incidence declining as the age of the children increases.

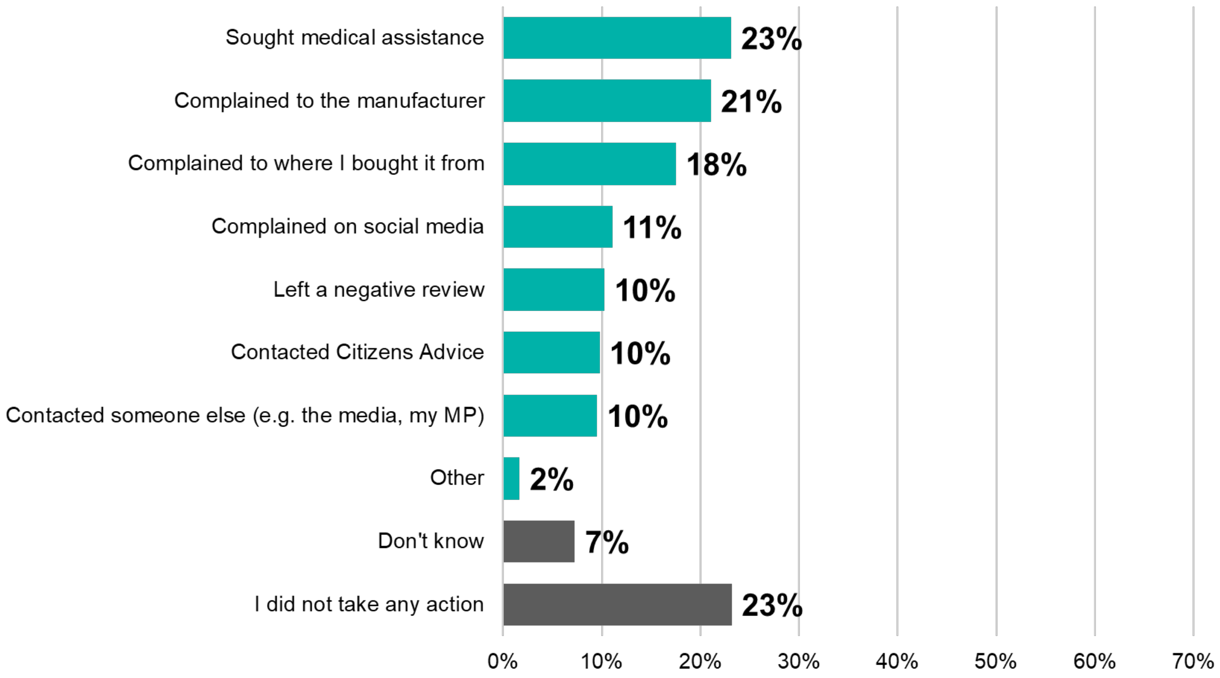
Respondents from a Black, Asian and minority ethnic (BAME) background are more likely to state that someone in their household has or has nearly swallowed a button battery (6%), compared to 1% of white respondents.

Those living with a disability are also more likely to report this (4%) compared to those without (1%).

Stress is the most commonly identified (39%) result of swallowing, or nearly swallowing, a button battery. Three in ten (29%) respondents stated that doing so caused physical harm.

Nearly a quarter (23%) of those who experienced this took no action as a result, meanwhile the same proportion sought medical assistance (23%). One fifth of respondents report complaining to the manufacturer (21%) or to the place the item was bought from (18%). While one in ten contacted either Citizens Advice (10%), or someone else, such as the media or an MP (10%).

Figure 42. Action as a result of swallowing button battery



Q: And which, if any, of the following did you do as a result of that safety issue?
Base: All respondents who report someone in their household swallowed or nearly swallowed a button batter (W3=167)

Key driver analysis

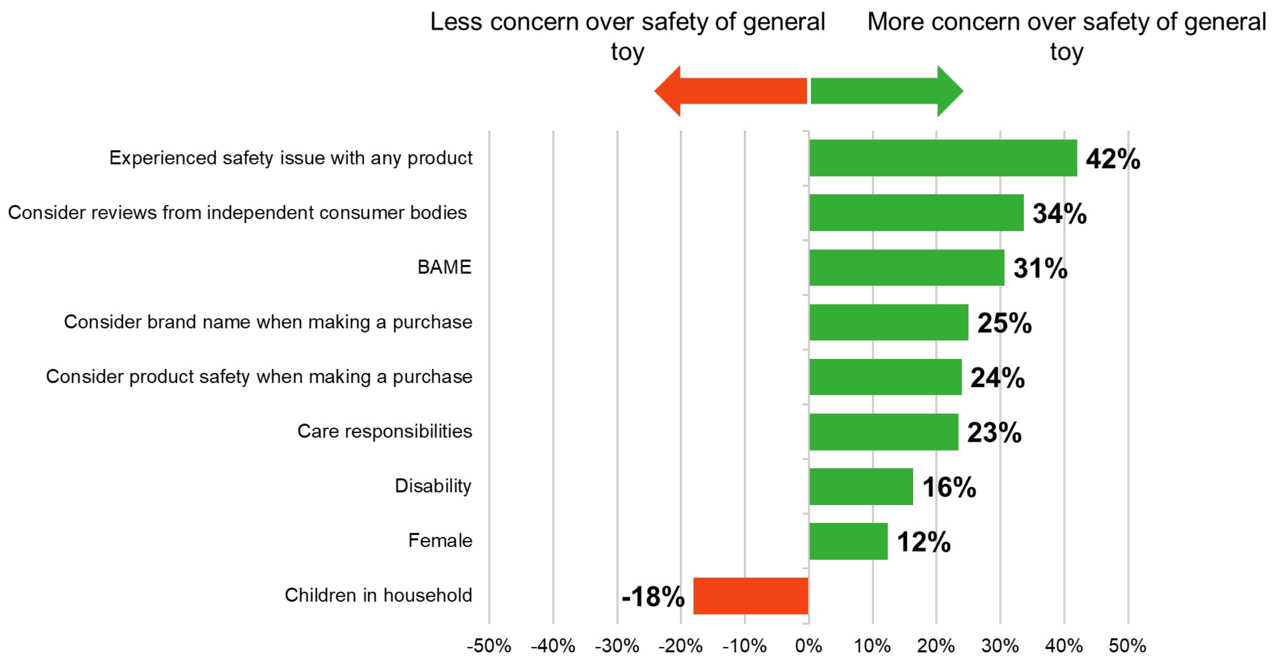
The results presented in this section are the outputs of logistic regression models that aim to predict which demographic or contextual factors are most closely associated with safety concerns with toys.

Including this multivariate analysis provides a more robust understanding of behaviour through looking at a number of variables at the same time, which isolates the effect of each factor after taking into account the simultaneous effects of other factors.

For the purposes of this analysis, board games, dolls/ action figures, and building blocks will be referred to as generic toys, while magnetic building blocks, magnetic fidgets and magnetic desk toys as magnetic toys, and toys powered by button batteries as battery-powered toys.

The figures below show the demographics, experiences and perceptions which are most highly associated with concern over different toy types. The model identifies that concern levels increase with age, although this is predominately seen when thinking about magnetic or battery powered toys, compared to general toys. The gender of respondents also impacts concern, women are considerably more likely to identify a concern with toys, particularly with magnetic toys and then battery-powered toys. Possibly linked to this, those with care responsibilities[9] are consistently more likely to state concern over any of the toys. Interestingly, increased concern is not evident among those with children in their household, in fact concern for battery-powered and general toys decreases among this group.

Figure 43. Key drivers for concern of general toys

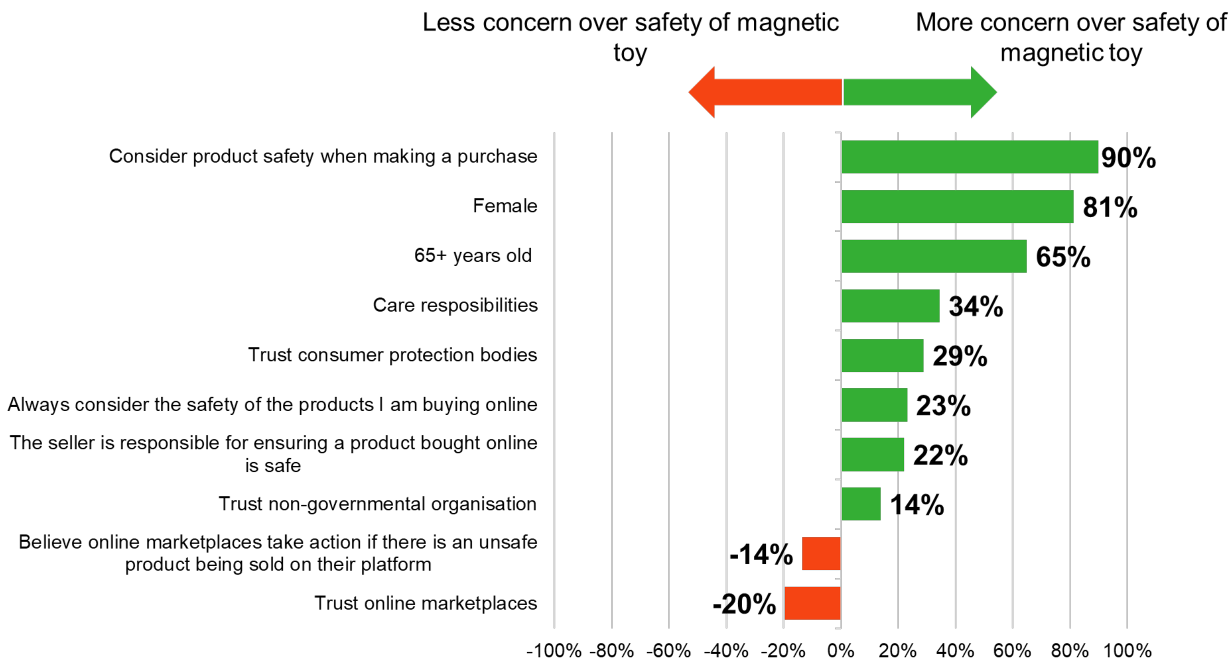


When examining the effect of institutions that play a role in the product safety environment, it appears that the more individuals trust non-governmental organisations or consumer

[9] Caring responsibilities may be short term, e.g. supporting someone with recovery following an accident, or long term, e.g. helping someone with a long-term illness.

protection bodies, the more likely they are to be concerned with toys safety, across all categories, although this is especially pronounced with magnetic and battery-powered toys, possibly as a result of increased awareness around safety messaging for these types of toys. Comparatively, the more trusting that individuals are of the vendors, such as online marketplaces, the less likely they are to be concerned with the safety of magnetic or battery-powered toys, possibly due to assumed safety of the products. Likewise, respondents who believe marketplaces act against safety issues are less likely to report concern with toy safety.

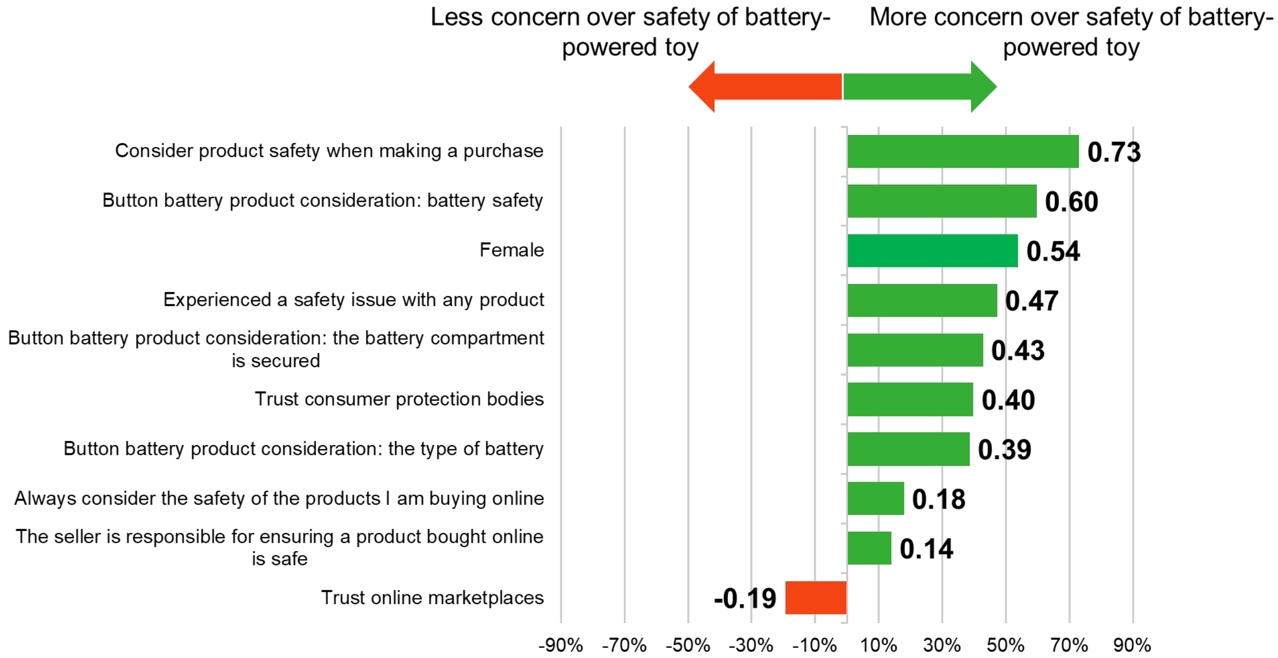
Figure 44. Key drivers of concern of magnetic toys



Those who consider the safety of the products they buy online are more likely to be concerned with the safety of toys – again, especially when thinking about magnetic or battery powered toys. In line with this, higher consideration of product safety when making a purchase is also linked with increased concern. Interestingly, where consumers place responsibility of safety also impacts their concern over toys: those who think sellers are responsible for ensuring the safety of the products see increased concern.

Looking at battery-powered toys specifically, safety considerations are strongly connected to what people look for in a product, namely the battery safety and the battery compartment being secured alongside the type of battery. Those who report concern about such features are more likely to be concerned with the safety of battery-powered toys. Conversely, the more individuals care about the price of the product, the less likely they are to show safety concerns.

Figure 45. Key drivers of concern of battery-powered toys



Qualitative findings on button and coin batteries

Participants in the qualitative groups had button and coin batteries in their home, they were often featured in watches, toys, car keys and in kitchen scales in their homes. In general, participants were aware of issues around button and coin batteries; many had been made aware of the dangers through the media and hearing cautionary tales from friends and family. They had knowledge of specific hazard around swallowing these batteries. As well as being a swallowing hazard, participants also mentioned that they can leak and that they are a fire hazard.

"We have them in a little Tamagotchi toy my son has, several watches, car keys and a mini lava lamp" (40+, ABC1)

"Unfortunately, there is a family local to us that lost their young daughter, and they are currently campaigning against their use" (40+, ABC1)

These preoccupations about safety meant that they were very cautious about these types of batteries being close to children, therefore batteries are kept out of reach. Those who had children were more acutely aware of safety issues with these types of batteries and were more likely to report having multiple ways to keep them away from children e.g., have them locked away or in a high place which was hard to access.

"I keep them well away from my kids and don't store them loose… I have heard stories of children dying/almost dying from eating them" (18-40, 2CDE)

"I put them in a tin and hide them on top of a cupboard out of reach from my 4-year-old" (18-40, ABC1)

"I keep all batteries away from children, but button cells batteries are particularly well guarded, I keep them in a toolbox which is difficult to open and out of reach of children" (18-40, ABC1)

Most participants were familiar with secured compartments, they appreciated their purpose and how they were effective in protecting children. Some felt that they were inconvenient when needing to change batteries as they often required a screwdriver or other tool, and they need to be disposed of in a safe away e.g., at a supermarket.

> *"Of the ones I have seen, they are more secure as they have a screw or special way to take them off kind of like a medicine bottle top" (18-40, 2CDE)*

> *"Bit of a pain when you have to go and look for a screwdriver, but well worth it for the safety of everyone" (40+, 2CDE)*

Though most did not feel that warnings were featured on button or coin batteries they were aware that they should be treated differently to 'normal' batteries. Their knowledge of this also came from consumer programmes, many felt that there is a need to continue to educate consumers about the hazards of button and coin batteries.

> *"I haven't seen any warnings on packaging or safety campaigns" (40+, ABC1)*

> *"I watch consumer programmes and see it mentioned there but there need to be safety ads in the middle of prime-time programmes" (40+, ABC1)*

Magnet campaign

Since March 2021, four percent said that they had seen adverts about magnet safety that were in the style asked about in the survey[10], this is a marginal shift one wave two (3%). This rose to seven percent for those aged 18 to 29, this is significantly higher than those 65 and over (3%).

The adverts are also more commonly recognised by those with children in their household (8%) compared to those without (3%). Among this group, respondents with children 10 years old and under are most likely to report seeing them before (9%).

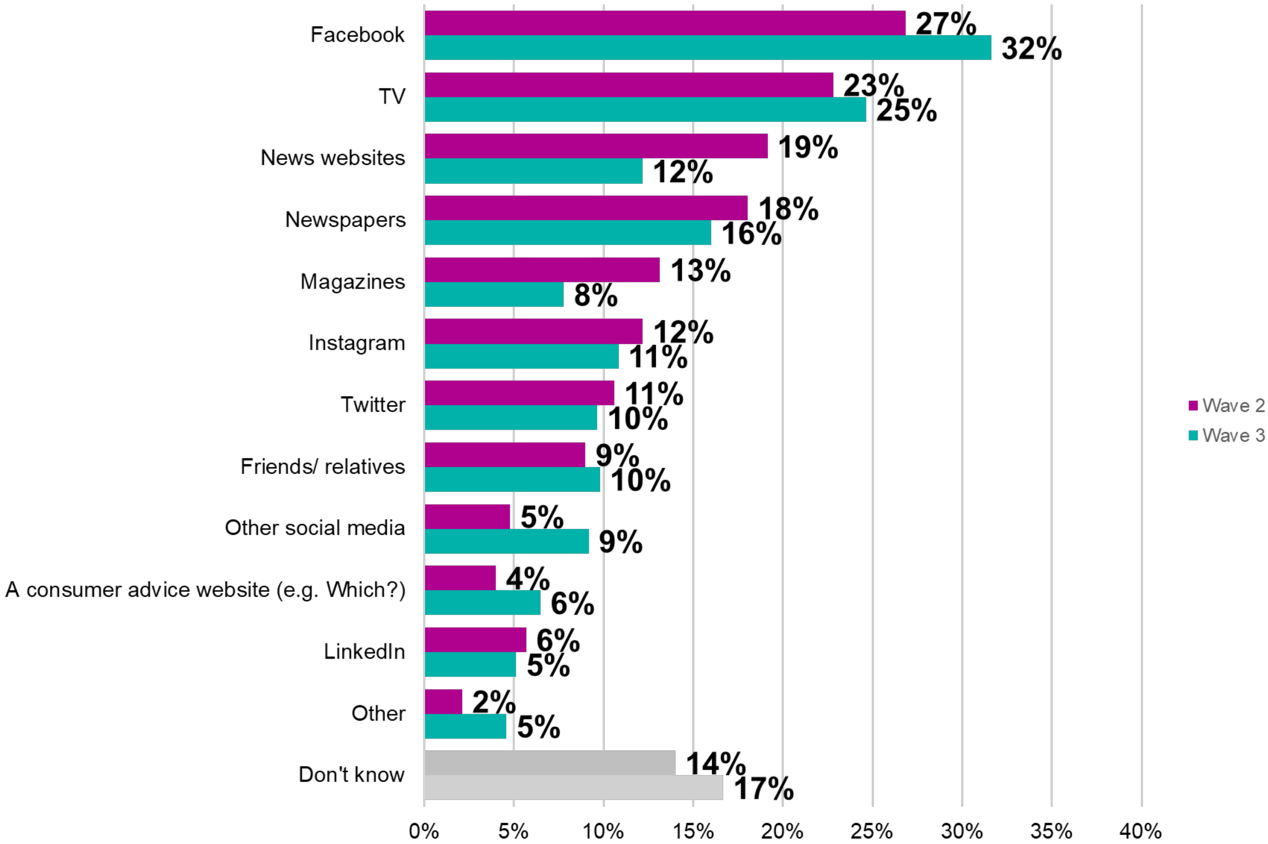
Respondents from a Black, Asian and minority ethnic (BAME) background are more likely to state they have seen an advert in that style (8%) compared to white respondents (4%).

Among those saying that they had seen adverts about magnet safety since March 2021, most commonly people saw these on Facebook (32%) or TV (25%), both in line with wave two. The next most common sources were newspapers (16%) and news websites (12%) – the latter of which saw a significant decline compared to wave two (19%).

Generally, there is little difference in source recall across the demographic groups, younger respondents are more likely to identify Instagram, with a quarter (24%) of 18 to 29s reporting this, which is significantly higher than all other age groups. Conversely, those aged 65 and over are most likely to identify TV (40%) and newspapers (32%).

[10] Images of the adverts shown are provided in the technical report

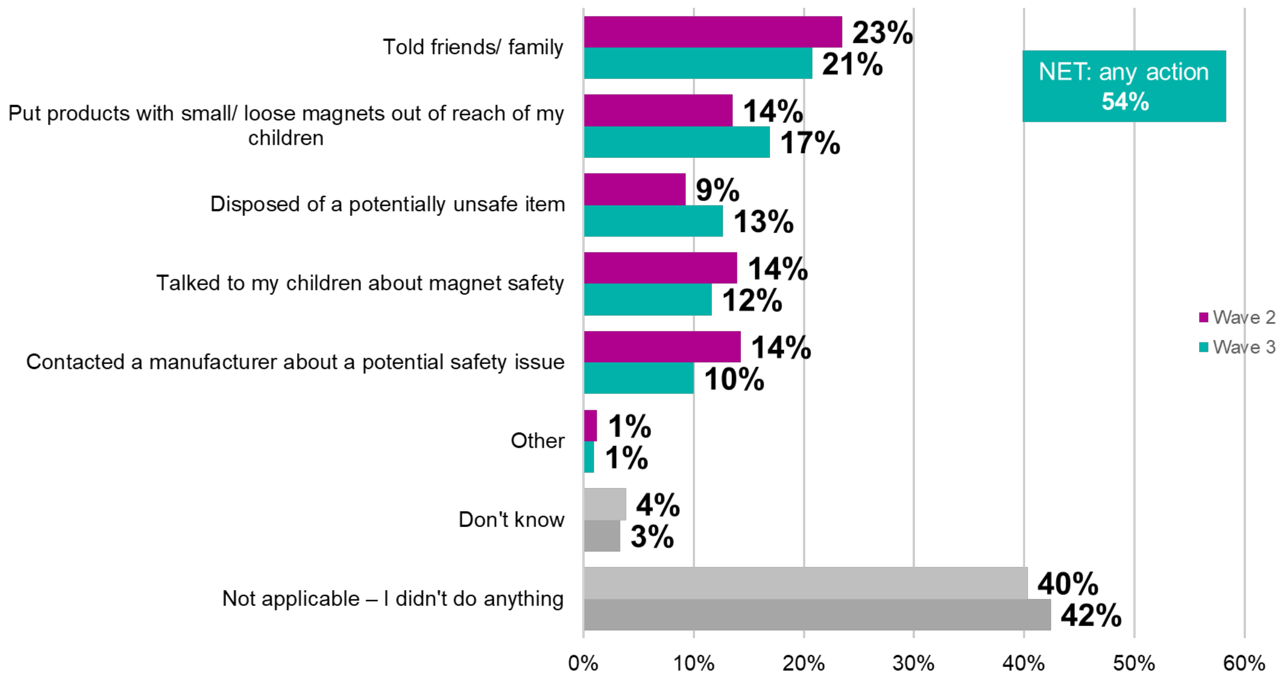
Figure 46. Where adverts about magnet safety were seen



Q: You said you'd seen adverts about magnet safety recently. Which, if any, of the following places did you see them? (Please select all that apply)
Base: All who saw campaign (W2=294; W3=337)

As seen in wave two, among those that had seen adverts about magnet safety in the last six months, over half (54%) took at least one of the actions listed. Most commonly, they told friends/ family (21%). Around one in ten talked to their children about magnet safety (12%) or contacted a manufacturer about a potential safety issue (10%). All actions remain consistent with last wave. However, it remains that a relatively high number (42%) say that they didn't do anything.

Figure 47. Actions taken as a result of seeing adverts about magnet safety



Q: You said that you have seen adverts about magnet safety recently...Which, if any, of the following did you do as a result? (Please select all that apply)
Base: All who saw campaign (W2=294; W3=337)

As is wave one, respondents with children in the household are much more likely than those without to say that they took one of the actions listed (71% vs. 39%). One fifth (21%) report they spoke to their child about magnet safety and a quarter (25%) told their friends and family.

Interestingly, the survey suggests that the adverts resonated more strongly with minority ethnic respondents than white respondents. The vast majority (83%) of respondents from BAME backgrounds say that they took at least one of the actions listed after seeing the adverts (compared to 46% of white respondents). This is also the case when looking at those with a disability, six in ten (61%) report taking any action, compared to 47% without a disability.

Batteries campaign

Five percent of the UK public report that they had seen adverts about button / coin battery safety in the style asked about in the survey[11] in the last six months. Unlike the magnet campaign, recognition was similar across age groups: 6% of 18 to 29s stated they had seen one, while 5% of those aged 65 and over reported the same.

Similar to the magnet campaign, the adverts are also more commonly recognised by those with children in their household (9%) compared to those without (4%). Among this group, respondents with children five years old and under are most likely to report seeing them before (12%).

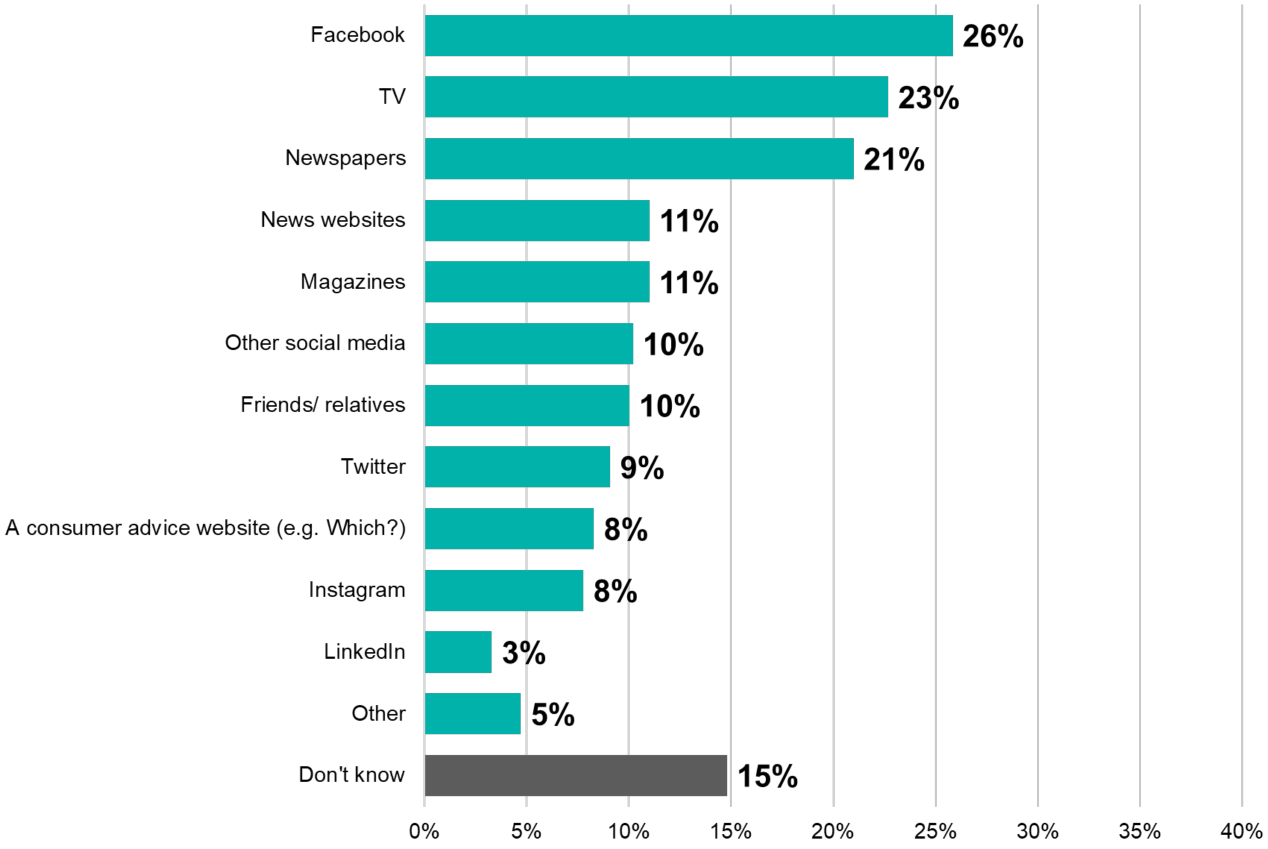
[11] Images of the adverts shown are provided in the technical report

Respondents from a Black, Asian and minority ethnic (BAME) background are more likely to state they have seen an advert in that style (9%) compared to white respondents (5%).

Those with lower and medium educational attainment are also more likely to report campaign recognition (both 6%), compared to 4% of those with high educational attainment.

Among those saying that they had seen adverts about button / coin batteries, respondents most commonly stated they saw them on Facebook (26%) or TV (23%). Those aged 18 to 29 are more likely than any other age group to report seeing them on Instagram (26%) or Twitter (22%). Comparatively, those aged 65 and over are most likely to report seeing them in newspapers (35%) or on the TV (36%).

Figure 48. Where adverts about button / coin battery safety were seen



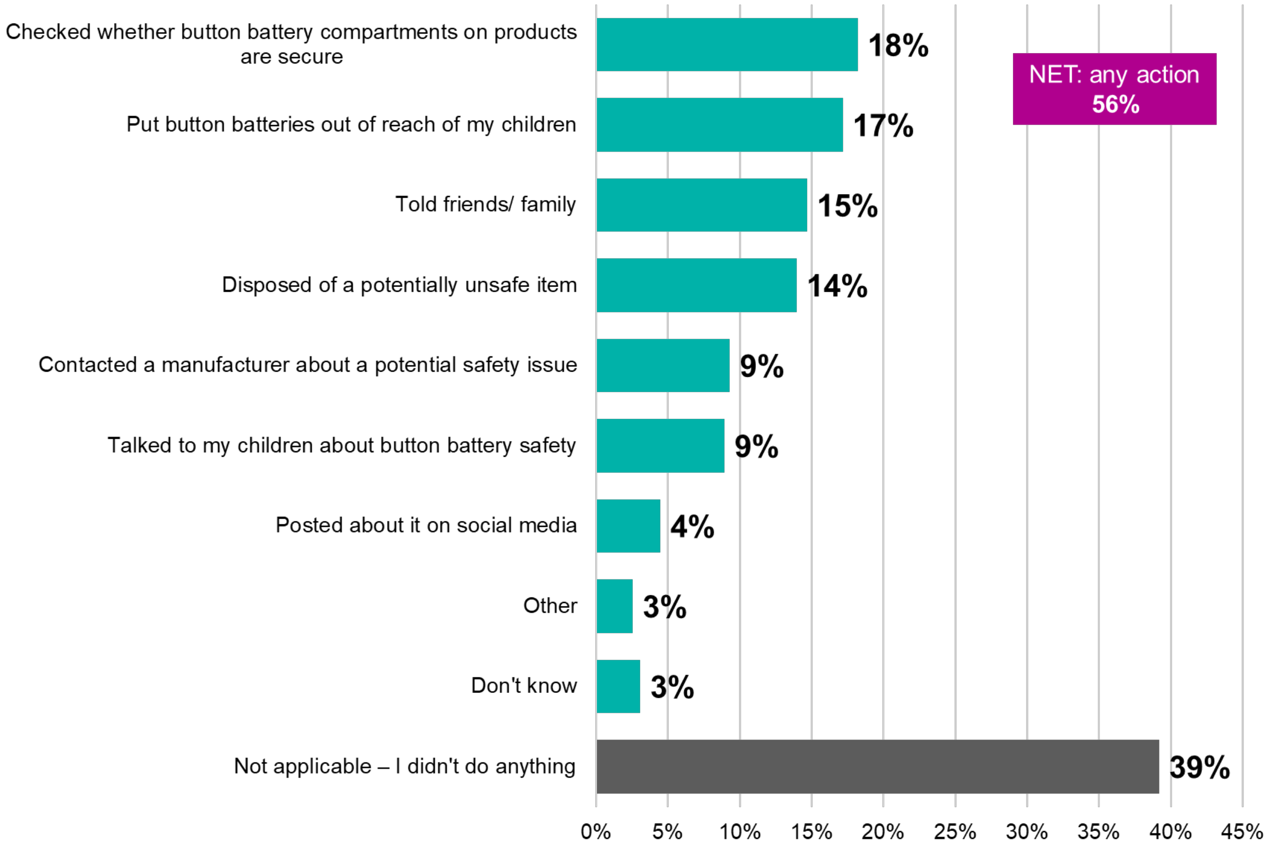
Q: You said that you'd seen adverts about button battery safety recently...Which, if any, of the following places did you see them? (Please select all that apply)
Base: All who saw campaign (W3=329)

Among those that had seen adverts about magnet safety since March 2021, over half (56%) took at least one of the actions listed. Most commonly, they checked that button battery compartments on relevant products were secure (18%) or moved the button batteries out of reach of children (17%).

However, nearly two fifths report doing nothing as a result of seeing the campaign (39%) – this was driven by those without children in their household (52%), while a fifth (19%) of those with children in their household did nothing.

Despite most people with children in their household reporting taking action (77%), only just over a sixth (17%) report talking to their children, while just under two fifths (18%) contacted a manufacturer.

Figure 49. Actions as a result of seeing adverts about button / coin battery safety



Q: You said that you have seen adverts about button battery safety recently...Which, if any, of the following did you do as a result? (Please select all that apply)
Base: All who saw campaign (W3=329)

Those living with a disability are also more likely to report taking any action (65%) compared to those without (49%), especially: talking to children (15% compared to 4%) and contacting the manufacturer about a potential safety issue (15% compared to 5%).

Circular economy: Right to Repair

Key findings:

- Most would replace a broken item, rather than repair it - over eight in ten said they would replace broken electrical appliances (87%), baby products (85%), homeware (84%), or furniture (81%).

- When thinking about their most recent experience of an electrical item breaking, over half of those who thought about a small kitchen appliance (61%), or charger (57%) reported buying a new one.
- The qualitative groups noted that people considered multiple factors - weighing up the original price of the item, the price it would be to fix the item, the price it would cost to replace it, along with the sentimental value

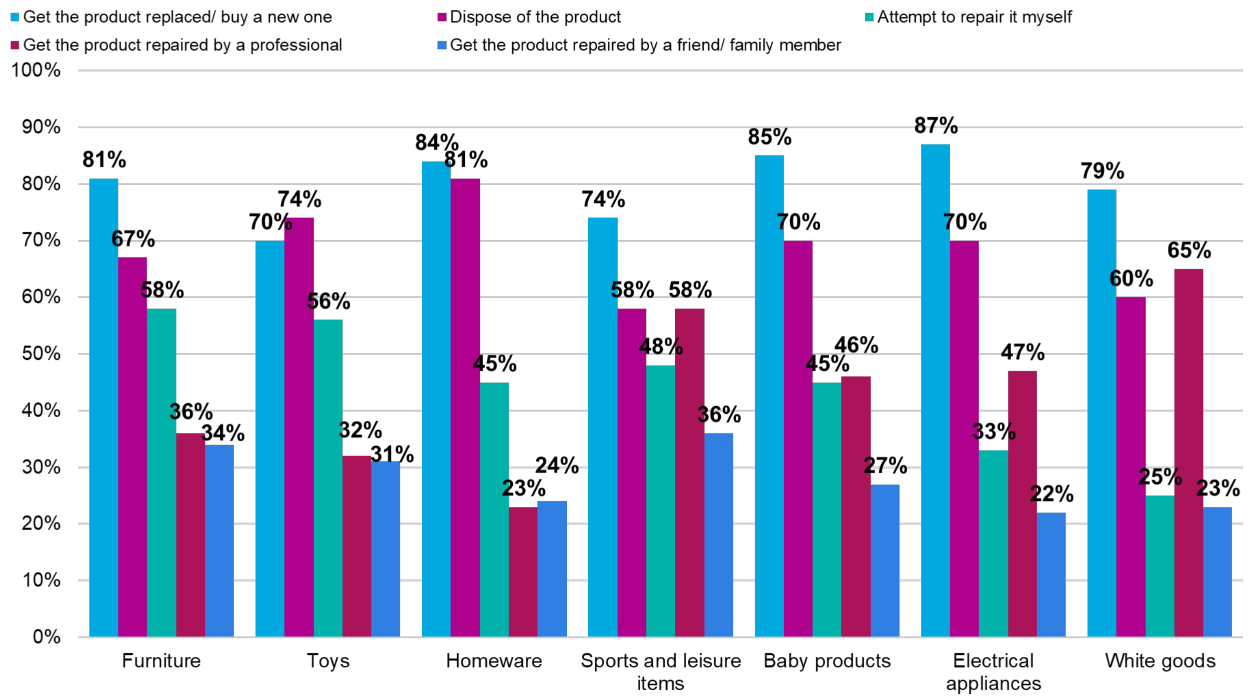
The circular economy involves reducing, reusing, and recycling resources – which includes repairing items to ensure their lifespan is as long as possible.

When asked what they would do if a specific product broke so that it was no longer operating correctly, the most common answer is generally to directly replace it/ purchase a new one. Over eight in ten said they would replace broken electrical appliances (87%), baby products (85%), homeware (84%), or furniture (81%). If a toy broke and was no longer working correctly, most would likely dispose of the item (74%) with slightly fewer reporting that they would replace it (70%).

All the options around repairing products were much less popular, although over half would attempt to personally repair furniture (58%) or toys (56%). Respondents were less likely to attempt a repair of more complicated items, with most preferring to get a professional involved for the repair of white goods (65%), sports/ leisure items (58%), and electrical appliances (47%) instead of attempting a fix themselves.

Younger respondents are the most likely to get someone, anyone, else involved – whether that is a professional or a friend/ family member. Over half would get a professional to repair an electrical appliance (51% 18-29 vs 46% 65+) and two-fifths would get a friend/ family member to do it (40% vs 10% 65+). This pattern is true even for items where repairs may be more accessible to laypeople - two-fifths would find a professional to repair toys (41% vs 34 65+) and almost half would ask a friend/ family member (48% vs 20% 65+).

Figure 50. Proportion likely to take each action if a given item was no longer operating correctly.



Q: For the following question, please imagine you owned a [product] which had broken and was no longer operating correctly. How likely, if at all are you to do each of the following things?
Base: All in circular economy section: (electrical appliances n=1,109; baby products n=948; toys n=1,107; white goods n=946; furniture n=1,266; homeware, non-electrical n=475; sports and leisure items not including clothes n=947)

Thinking about their own experiences many have had an electrical appliance, which was not covered by guarantee or warranty, stop working in the last year. The most common appliances to stop working outside warranty/ guarantee are chargers and small kitchen appliances (both 14%).

Once an electrical appliance stops working, the most common action is simply to purchase a new product. Respondents were asked to think about their most recent electrical appliance which stopped working – over half of those who thought about a small kitchen appliance (61%) or charger (57%) reported buying a new one. Generally, buying a new item is in the top three actions people take when an electrical appliance stops working, with the exception of smart home devices – only 16% of people who reported a broken smart home device in the last year say they bought a new one as a result.

Those with out-of-warranty broken smart home devices are the most likely to contact the manufacturer or retailer (21%) – fewer than one in ten with a broken kitchen appliance (7%) or charger (6%) report doing so.

Figure 51. Top three actions in response to each item stopping working while out of warranty/ guarantee

Laptop/ tablet/ mobile phone	Charger	Speaker	Small kitchen appliance	Electronic game/ console	Vacuum cleaner	Smart home device
Bought a new one 41%	Bought a new one 57%	Bought a new one 31%	Bought a new one 61%	Attempted to repair it myself 23%	Bought a new one 49%	Attempted to repair it myself 22%
Attempted to repair it myself 23%	Disposed of it 37%	Attempted to repair it myself 25%	Disposed of it 42%	Disposed of it 23%	Disposed of it 21%	Contacted manufacturer/ retailer 21%
A professional attempted to repair it 19%	Did not take any action 9%	Disposed of it 25%	Attempted to repair it myself 7%	Bought a new one 21%	Attempted to repair it myself 21%	Did not take any action 20%
N=420	N=566	N=92	N=589	N=71	N=318	N=76

Q: For the following question, if multiple products have stopped operating correctly in the past year, please think about the most recent instance of this. Which, if any, of the following actions did you take when this product stopped operating correctly?
Figures in green/ red are significantly higher/ lower than average

Overall, just over two-fifths (43%) of those who sought a repair for their electrical item were successful. A fifth (20%) were successful in repairing the item themselves. The highest rate of failure is in attempting to repair small kitchen appliances or speakers, regardless of who attempted the repair (both 61%).

Although people are more likely to attempt to repair a laptop/ tablet/ phone themselves, those who took it to a professional were more likely to be successful (37% who attempted a repair themselves vs 49% who went to a professional).

When the repair is being done by the respondent themselves or a friend/ family member, almost half turned to YouTube for information (47%). Over half of those repairing a laptop/ tablet/ phone looked at YouTube (55%), but they also looked at general search engines (44%), and online forums (34%). Those attempting to fix their vacuum cleaner were the most likely to turn to official sources such as the manufacturer's website (29%) or their product manual (28%).

Qualitative findings on Right to Repair

In the qualitative research, participants reflected that they would repair products based on a number of factors, largely focused on complexity.

Participants weighed up the original price of the item, the price it would be to fix the item, the price it would cost to replace it, along with the sentimental value. After weighing up these factors, consumers would then decide whether to dispose of the item, fix it themselves or have the item fixed by a professional.

"I would bring it to the seller or manufacturer, not try to repair it myself. I don't have the knowledge to safely do it" (18-40, ABC1)

"[I consider] cost of repairing, along with age of product, versus, cost and affordability of a replacement" (40+, ABC1)

Some participants commented that they enjoy the process of learning how products work and how they might be able to fix it. They might attempt to fix the product themselves and see whether this is successful, then reach out to other contacts.

They often rely on family members to fix items based on their experience. They might also ask family and friends for recommendations for a professional to repair an item in their local area.

"If I had the knowledge to fix, I would fix, if I cannot then I would contact the company & resolve through repair or, swap or refund" (18-40, ABC1)

"100% try to repair it. I've done this frequently with items that are out of warranty. I am happy to take stuff apart and get a soldering iron out" (18-40, 2CDE)

"[I would only trust] my stepdad. He is amazing. If he can't fix it no one can. Although YouTube can be excellent." (40+, 2CDE)

They would look to a professional to fix an item if it was deemed to be complex e.g., a white good or electrical item, where they might need professional training in order to repair it correctly.

Many mentioned that they would consider how difficult the item was to repair, looking at how complex it might be to dismantle and reassemble it. Some also consider how long the repairing process may take, this has an impact on whether they would start the task.

Though a minority would look online to see if other consumers had similar problems which they had resolved, looking on sites such as YouTube or reading an instruction manual. Others also look to FAQs on the company website and any troubleshooting tips, a minority would contact customer services directly.

Participants often consider their safety and the safety of those around them when deciding whether to repair an item, many would not even consider repairing an item if there was a potential hazard.

"I'm funny with electrical got to know what you're doing to repair or know who to trust" (18-40, 2CDE)

"Personally, I would never try to repair myself as I wouldn't risk messing it up" (18-40, 2CDE)

"I think the older things are the easier they seem to be to repair. more modern items seem to have sealed units or need a whole replacement rather than just a part" (18-40, 2CDE)

Some would contact the retailer or manufacturer and see what their policy is for repairing items which are under warranty. Others might check to see if their insurance covers the specific item and the issue they were facing.

Participants felt that manufactures have a responsibility to share how to repair items, whoever then repairs the product holds liability if there is a further fault. Many commented that they feel that manufactures are not open about how to fix items as they would prefer that consumers buy a new product, rather than repair their current one.

"I would try to get it repaired. If it was still under warranty, I would contact the retailer. If it wasn't under warranty, I would ask friends and family do they know anyone who would look at it" (40+, 2CDE)

"The repairer is responsible for their actions, but the manufacturer would be held accountable" (18-40, 2CDE)

Participants asserted that they often try to repair products so as not to create more waste, making their overall purchases more sustainable, instead of purchasing an item new. Apple was felt to be a brand which prefers consumers to buy more products, whereas brands like Dyson encourage repairs and recycling.

Participants commented that they now look out for brands which explicitly outline their policies around replacement and repairing, and that they are more likely to purchase from 'green' brands, as their products will last in the long term.

"I would not like to dispose of an electrical item if it can be avoided. I would rather it be recycled where possible" (18-40, ABC1)

"Unfortunately, in this society it costs more getting it repaired/buy one part than replacing it all together. If I can find a way to reuse it or recycle it I will" (18-40, ABC1)

"I would hope that in the future things will be made to be repaired rather than just sent to landfill" (18-40, 2CDE)

"Somethings are also easily repaired i.e., Dyson, Shark etc easy to source replacement parts and click into place" (40+, ABC1)

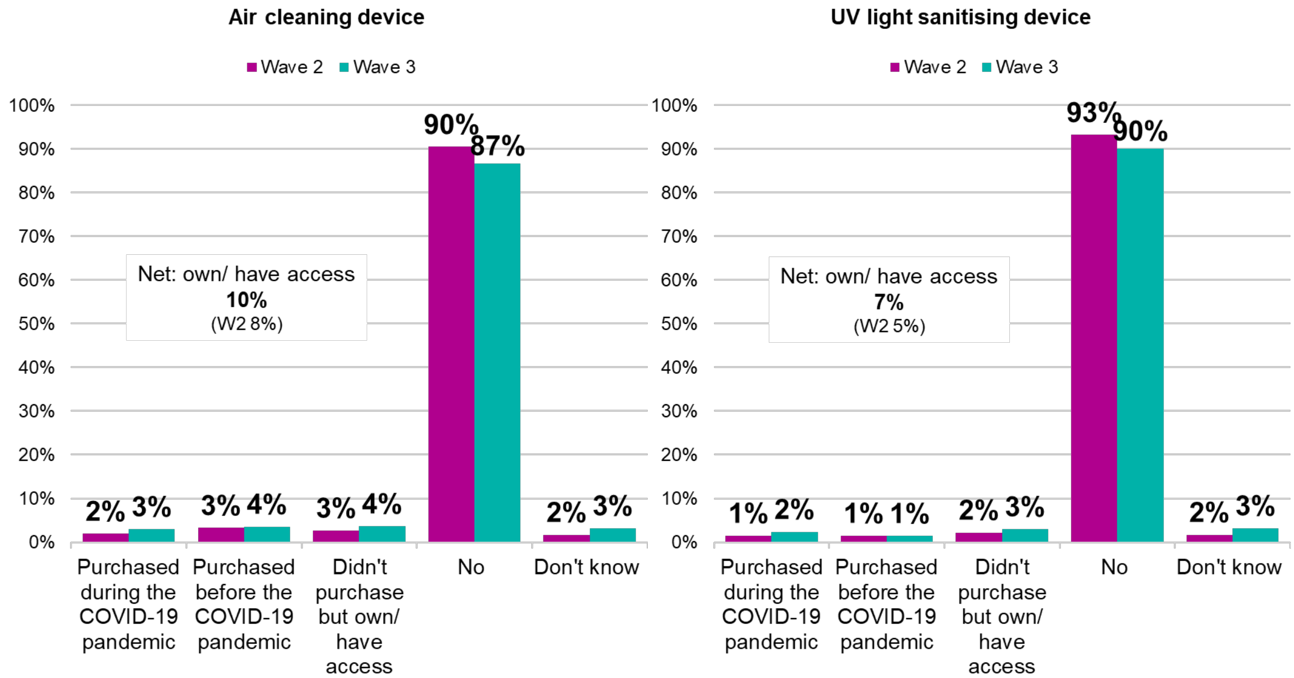
UVC and air cleaners

Key findings

- One in ten of the UK public own an air cleaning device (10%), with slightly fewer owning a UVC light sanitizing device (7%).
- Over a third of those with UV devices (37%) said that they or someone in their household experienced negative side effects either during or shortly after using the device. Two-fifths said it happened during normal operation of the device while following the manufacturer's instructions and warnings (41%).

There has been a significant rise in the proportion of the UK public owning/ having access to an air cleaning device (8% W2, 10% W3), or a UVC light sanitising device (5% W2, 7% W3). Consistent with wave two, younger consumers are the most likely age group to own/ have access to an air cleaning device (16%) or UV device (13%). Also consistent with wave two, BAME respondents are more than twice as likely as white respondents to own an air cleaning device (22% vs 9%) or UV device (16% vs 5%).

Figure 52. Purchase of air cleaning/ UV light sanitising devices



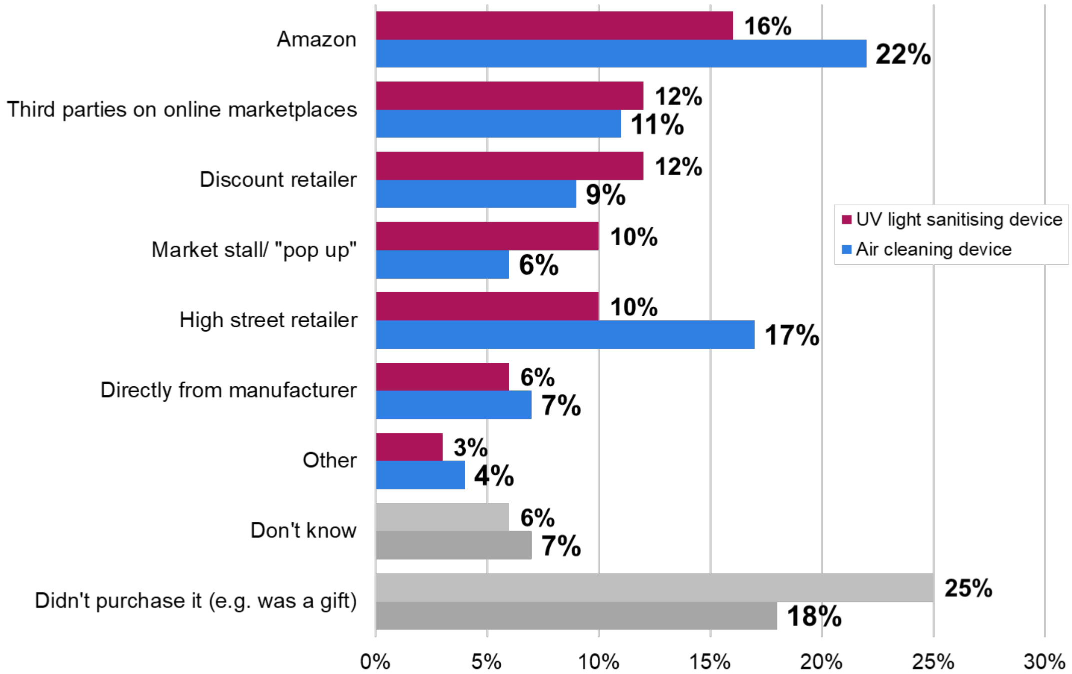
Q: Have you purchased the following for use against bacteria and viruses, including COVID-19?
Base: All respondents (W2 n=10,296; W3 n=10,187)

Ownership of UV devices and air cleaners in the offline population is consistent with the general public – 5% own/ have access to a UV device and 8% own/ have access to an air cleaning device

Of those who have an air cleaner, around a fifth (18%) did not purchase it themselves. The most common source for those who did purchase the device themselves is Amazon (22%), followed by high street retailers (17%). There is an upward trend by age for purchasing an air cleaning device from a high street retailer – older respondents are much more likely to do this than younger respondents (10% 18 to 29, 15% 30 to 49, 20% 50 to 64, 27% 65+).

Of those who have a UV light sanitising device, a quarter (25%) did not purchase it themselves. The most common source for those who did make the purchase remains Amazon (16%), followed by discount retailers (12%), and third parties on online marketplaces (12%). Overall, only one in ten purchased their UV device from a market stall/ “pop-up” (10%), but there is a clear trend by age with no respondents aged 65 and over purchasing their device from a market (13% 18 to 29, 12% 30 to 49, 2% 50 to 64, 0% 65+).

Figure 53. Place air cleaning device/ UV light sanitising device was purchased from



Q: From which, if any, of the following did you get your device?
Base: All who have an air cleaning device (955); All who have a UV light sanitising device (n=625)

The most common types of UV device are lamps which sit on the floor/ a table and sanitise a wide area (21%) or a handheld wand/ stick (20%). Almost three in ten respondents with a UV device are unsure what type of device they have (28%), although those who were gifted the device or simply have access to one are not sure of the specifics - over three-fifths (63%) of respondents who did not personally purchase the UV device do not know what type it is.

Over a third of those with UV devices (37%) said that they or someone in their household experienced negative side effects either during or shortly after using the device. The most common side effect is eye pain (12%). A quarter of those who experienced eye pain reported it happening many times (26%) and two-fifths said it happened during normal operation of the device while following the manufacturer's instructions and warnings (41%). Only one-fifth (21%) said the eye pain was caused when not following the usual instructions and warnings. When asked to rate the severity of the side effect experienced, a third considered it serious (35%).

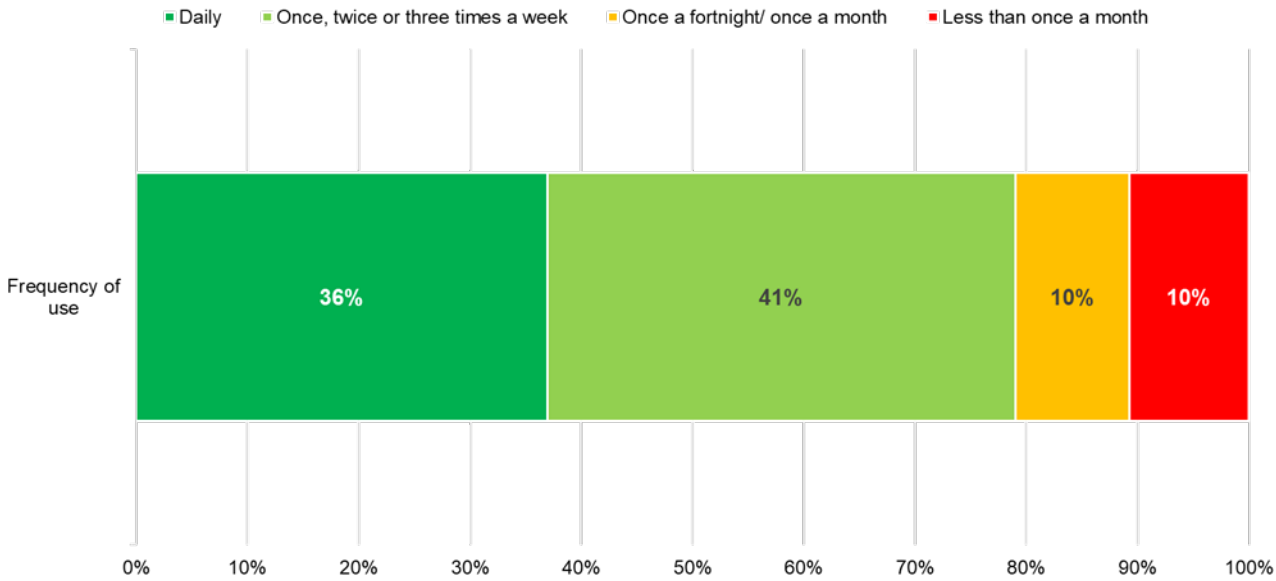
One in ten of those who own/ have access to UV devices said they/ someone in their household experienced headaches during/ after using the device (10%). A third say the headaches occurred when following instructions and warnings (34%), but a similar proportion were not following the instructions (31%). A quarter said the side effect was serious (24%) but a third said they were just mild side effects (34%).

Eyelash serums/ creams

- Nine out of ten (91%) of the UK public have not used any eyelash serums/ creams, with younger respondents (aged 18 to 29) being the most likely to have used them (11%).
- A quarter of those who bought eyelash serums/ creams themselves, purchased them from a high street retailer (24%).
- Almost half (46%) of respondents who use eyelash serums experienced a side effect of some kind, with itchiness and irritation being the most common (12%).

The majority of respondents have not used any eyelash serums/ creams (91%). 18 to 29 year olds (11%) are significantly more likely to have used them, compared to any other age groups, and women are more likely to have used them (8%), than men (3%). Out of those who do use eyelash serums/ creams, the majority use them either daily (36%) or once a week or more (77%).

Figure 54. How often eyelash serums/ creams used

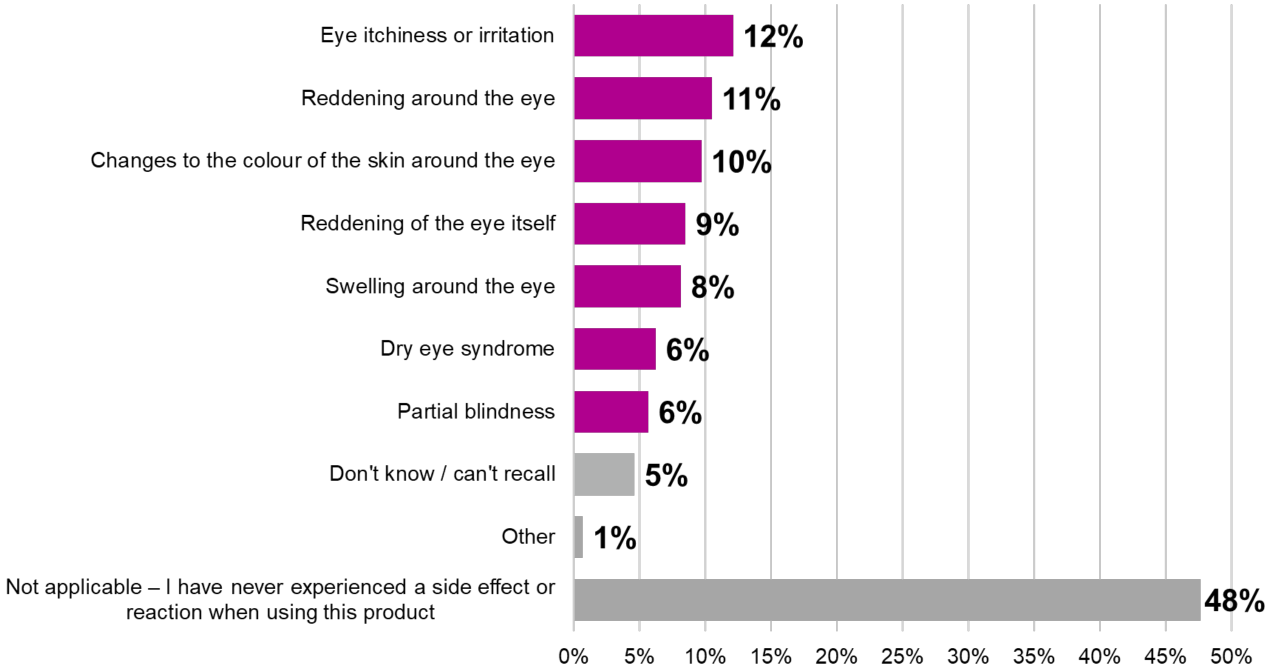


Q. You said that you have used a cosmetic product for the purpose of lengthening your eyelashes (not including mascara)...How often do you/did you usually apply the product?
Base: All in eyelash growth section (n=537)

Out of those who purchased the eyelash serum/ cream themselves, the most common places to buy them was at a high street retailer (24%), followed by an online marketplace (21%) and then a specialist cosmetics website (15%).

Out of those who use eyelash serums 46% experienced a side effect of some kind. Men who used the product were significantly more likely (84%) to experience a side effect than women who had used eyelash serums (33%). At a total level, the most common side effects are eye itchiness and irritation (12%), reddening around the eye (11%) and changes to the colour of the skin around the eye (10%).

Figure 55. Side effects of eyelash serums/ creams



Q. Have you ever experienced any of the following side effects or reactions when using this product?
Base: All in eyelash growth section (n=537)

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