



Department for
Business, Energy
& Industrial Strategy

BEIS PUBLIC ATTITUDES TRACKER

June 2019 (Wave 30)

Questions on clean growth, renewables, shale gas, consumer markets and artificial intelligence



OGL

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Contents

Glossary	4
Executive summary	6
Introduction	9
Headline findings	10
Clean growth	10
Energy infrastructure	11
Renewables	11
Shale gas	12
Consumer markets	17
Shopping around	17
Switching	21
Consumer rights	26
Consumer protection	32
Consumer dispute resolution services	34
Consumer problems	37
Trust in consumer organisations	39
Artificial intelligence	41
Awareness of artificial intelligence	41
Interest in artificial intelligence	42
Perceptions of artificial intelligence	43
Applications of artificial intelligence	45
Technical appendix	48
Technical notes	48
Fieldwork dates and sample sizes	48

Glossary

- **Artificial intelligence:** Technologies with the ability to perform tasks that would otherwise require human intelligence, such as visual perception, speech recognition, and language translation.
- **Base:** The number of people answering a survey question.
- **Cognitive testing:** An in-depth interviewing method to determine the reliability and validity of survey questions.
- **Consumer dispute resolution services:** Independent organisations which help people resolve a consumer dispute, such as an ombudsman.
- **Clean growth:** Growing national income while cutting greenhouse gas emissions.
- **Energy infrastructure:** A term used to capture a range of different energy sources that are covered by the survey and the interconnections between them. This includes a range of renewable sources (on-shore and off-shore wind, solar, wave and tidal, and biomass), nuclear, shale gas, and carbon capture and storage as well as the pipeline and other interconnectors between them.
- **Fieldwork:** The period where face-to-face interviews are conducted.
- **Omnibus survey:** A method of quantitative survey research where data on a wide variety of subjects is collected during the same interview.
- **Privacy notices:** Information provided by a service provider to inform users how they will use their personal information.
- **Quotas:** A target number of interviews for a certain characteristic during survey fieldwork (e.g. age).
- **Random location quota sampling:** A form of quota sampling that combines elements of random sampling and quota sampling. Once a random sample of locations is drawn, interviewers are tasked with interviewing a range of sub-groups within each location across different timing patterns based on a pre-agreed number of respondents.
- **Representativeness:** Similarity of the sample profile to benchmark population statistics, such as the Office for National Statistics mid-year population estimates.
- **Sample size:** The number of people included in the sample (a subset of the population).
- **Shale gas and fracking:** Shale gas is natural gas found in shale, a non-porous rock which does not allow the gas to escape. Hydraulic fracturing or “fracking” is a process of pumping water at high pressure into shale to create narrow fractures which allow the gas to be released and captured. The gas can then be used for electricity and heating.
- **Shopping around:** Comparing different products, services, deals or providers.

- **Social grade:** Social grade is a classification system based on occupation.¹ It contains the following categories:
 - A: Higher managerial, administrative and professional
 - B: Intermediate managerial, administrative and professional
 - C1: Supervisory, clerical and junior managerial, administrative and professional
 - C2: Skilled manual workers
 - D: Semi-skilled and unskilled manual workers
 - E: State pensioners, casual and lowest grade workers, unemployed with state benefits only
- **Statistical significance:** A statistical test to determine whether relationships observed between two survey variables are likely to exist in the population from which the sample is drawn. We only report on findings that are statistically significant at the 95% level.
- **Survey outputs:** The key deliverables from the survey. This includes:
 - A key findings report, presenting summary headline findings from June 2019.
 - Summary tables (Excel), showing trends across all waves of the tracker.
 - An Excel dataset containing questionnaire variables, demographic variables and derived variables for further analysis. An SPSS version of the dataset is available upon request.
 - Excel label data (CSV), containing labels for all variables.
 - Excel numeric data (CSV), containing numeric values for all variables.
 - Cross tabulation tables (PDF and Excel) for the current wave, including demographic and key question sub-group comparisons for all questions.
- **Switching:** Changing provider or contract for products or services.
- **Terms and conditions:** The rules a consumer must abide by to use a service or purchase a product.
- **Weighting:** An adjustment made to the data to ensure that survey results are representative of the target population (in this case, all UK adults).

¹ More information is available at the Publishers Audience Measurement Company Ltd (PAMCo) website. This is available at: <https://pamco.co.uk/how-it-all-works/interview-and-questionnaire/social-grade/>

Executive summary

Clean growth

- In June 2019, 78% of the public were unaware of “clean growth”, a decrease from 81% in March 2019.

Renewables

- Support for renewable energy decreased from 84% in March 2019 to 82% in June 2019 and is now at a similar level to July 2018.

Shale gas

- In June 2019, awareness of fracking remained stable at 78%. Levels of awareness of fracking have remained between 70% and 80% since December 2013.
- The proportion of people opposed to fracking decreased to 35% in June 2019, down from its highest point across the tracker in March 2019 (40%). Support for fracking increased from 12% in March 2019 to 15% in June 2019. The proportion that said they neither support nor opposed fracking remained steady at 47%.
- The most common reasons for opposing fracking was the loss and destruction of natural environment (64% of those opposing fracking, up from 57% in March 2019), followed by the risk of earthquakes (36%, down from 45% in March 2019).

Shopping around

- In June 2019, the products most commonly taken out during the previous 12 months were car insurance (35%) and home insurance (23%), with the public most likely to have shopped around for car insurance (32%), energy (19%) and home insurance (18%).
- The public mainly shopped around by using online price comparison websites or apps, by visiting websites of individual providers or suppliers, by phoning or emailing the provider or supplier directly, and by using consumer websites such as Which? and Moneysavingexpert.com.
- The main reasons why people did not shop around were because the offer from the provider was just what they wanted (ranging from 8% to 35% across all product and services).

Switching

- In June 2019, people were most likely to have switched provider or contract for energy (16%) and car insurance (15%).
- The main reason why people did not switch providers or contracts in the last 12 months was because they were happy with their current provider or contract (ranging from 75% to 91% across all products and services).

- The public generally found it easy (either very or fairly) to exit their previous contract. This was the case across a range of products or services (typically ranging from 77% to 95%).
- People rarely experienced problems during the switching process once they selected a new provider or contract. Where they did, people were more likely to experience problems when switching energy provider (13%), broadband provider (12%), or switching contracts for a bundle combining two or more services (12%).

Consumer rights

- In June 2019, seven in ten (69%) had purchased from a website with multiple sellers in the last 12 months, a similar proportion to July 2018 (67%). Over four in ten (44%) had purchased from a single retailer website, a decrease from July 2018 (48%).
- The public were asked whether they had used a range of online services over the last 12 months. They were most likely to use social media (64%), followed by streaming services (48%, up from 43% in July 2018). Levels of use were highest among younger age groups and dropped as age increased.
- Around six in ten of those who had used these online services claimed that it was easy to understand the terms and conditions for website with multiple sellers (61%, up from 55% in July 2018); single retailer websites (57%, up from 53% in July 2018); renting a service from another individual (59%, up from 53% in July 2018) and streaming online services (58%). Between 10% and 13% found it difficult to understand terms and conditions across all of these products and services.
- Six in ten users (59%) found it easy to understand privacy notices on social media platforms, 17% found it difficult to understand privacy notices, a decrease from 23% in July 2018. Over two in ten (23%) had not seen or read privacy notices, an increase from 18% in July 2018.

Consumer protection

- In June 2019, the public were more likely to feel that they were offered better protection in terms of their consumer rights when buying from a store on the high street (29%), than when buying from the website of a high street retailer (11%). Over half (52%) felt there was no difference.
- The public were more likely to think that buying from the website of a high street retailer (47%) offered better protection than buying from a private seller online (4%).

Consumer dispute resolution services

- In June 2019, over six in ten (62%) were aware of consumer dispute resolution services. Those with higher household incomes were more likely to claim awareness (76% of those with household incomes of £50,000 or more, compared with 59% of those with household incomes under £16,000).

Consumer problems

- In June 2019, two in ten (20%) had experienced a problem with a provider in the last 12 months, a decrease from 23% in July 2018. Problems were most commonly experienced with retail or shopping providers (5%), energy providers (5%) and broadband providers (4%).

- Most people contacted their provider in response to their problem across a range of providers (typically ranging from 77% to 91%). It was less common for people to contact someone other than their provider. This was most common for energy providers (8%).

Trust in consumer organisations

- Levels of trust (either a lot or a fair amount) were highest for Citizens Advice (81%) and Trading Standards (76%), followed by consumer groups (70%).
- Levels of trust were lowest for energy suppliers. Four in ten (41%) people trusted energy suppliers a lot or a fair amount but over half (52%) said they did not trust them very much or did not trust them at all.

Artificial intelligence

- New questions were added in June 2019 to assess awareness and attitudes towards artificial intelligence (AI). Eight in ten people (80%) said they had heard of artificial intelligence (AI) with 19% having never previously heard of this. One in ten (11%) said they had heard or read a lot about AI, 23% a fair amount and 31% a little. A further 14% said they had heard of AI but knew nothing more than this.
- Just over two in ten (22%) said they were very interested in AI, with 7% saying they will actively seek out information about future developments and 15% that they will take an interest in news stories or articles about future developments. A further 27% said they were interested in AI but unlikely to make a special effort to keep informed.
- When the public were asked how positive or negative they felt about the impact of increasing use of artificial intelligence in the UK, three in ten (29%) said they were positive about AI while almost two in ten (18%) said they were negative. A greater number of people said they were neither positive nor negative (49%), with a further 4% saying they did not know.

Introduction

The Public Attitudes Tracker (PAT) survey covers public attitudes towards Department for Business, Energy and Industrial Strategy (BEIS) policies such as energy, climate change and workers' rights. The survey began in March 2012 and runs four times a year. Some questions on issues where we think attitudes might shift quickly or be affected by seasonal changes are repeated quarterly; other questions are asked annually. The tracker is regularly reviewed to ensure that the dataset continues to offer valuable insight.

This report presents summary headline findings from June 2019 (Wave 30).

Data for wave 30 were collected between 5 June and 16 June using face-to-face in-home interviews with a representative sample of 4,231 adults (aged 16 and over) in the UK. Interviews were carried out using the Kantar UK Omnibus, which uses a random location quota sampling method.

Most of the questions included at wave 30 had been asked in previous waves. New questions were added on artificial intelligence. These questions were jointly developed between BEIS and Kantar and refined through cognitive testing. Full details of the methodology are provided in the technical note.²

The wave 30 questionnaire covered the following topics:

- Clean growth
- Renewables
- Shale gas
- Consumer markets
- Artificial intelligence

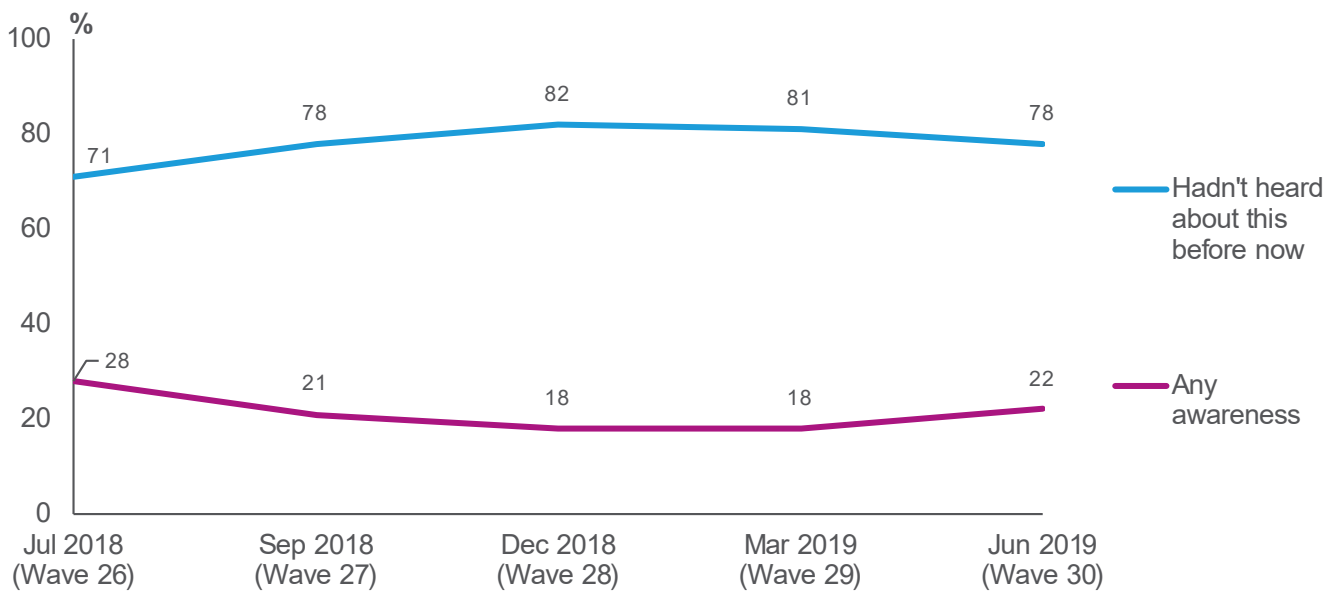
² Available at: <https://www.gov.uk/government/publications/beis-public-attitudes-tracker-technical-note>

Headline findings

Clean growth

In June 2019, 78% of the public were unaware of “clean growth”, a decrease from 81% when the question was previously asked in March 2019. The proportion who claimed to have any awareness of “clean growth” has increased from 18% in March 2019 to 22% in June 2019. Only 4% claim to know at least a fair amount about “clean growth”, with 1% claiming to know a lot.

Figure 1: Awareness of the concept of “clean growth” July 2018 to June 2019



Q80. The Government has recently begun to promote the concept of “clean growth”. Before today, how much, if anything, did you know about this concept?

Base: All wave respondents – July 2018 to June 2019. (Asked quarterly.) See technical appendix for base sizes.

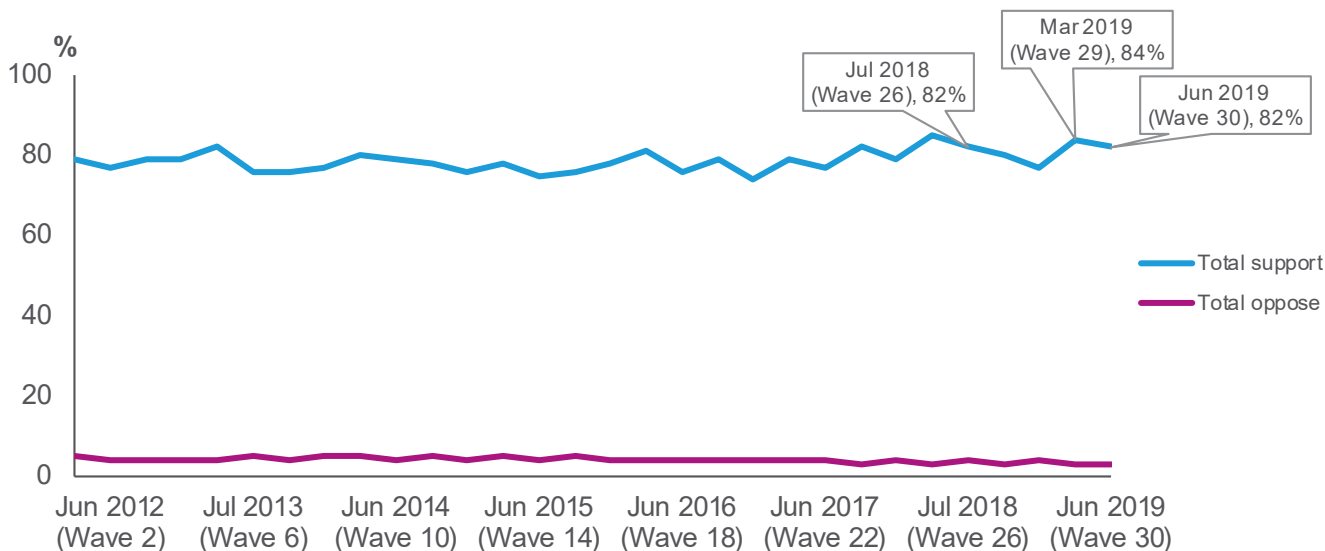
Men (25%, compared with 19% of women), those aged 16 to 24 (27%, compared with 17% of those aged 65 and over), and those in social grades AB (24%, compared with 17% of those in social grades DE) were most likely to claim awareness of “clean growth”.

Energy infrastructure

Renewables

Support for renewable energy decreased from 84% in March 2019 to 82% in June 2019 and is now at a similar level to July 2018. Opposition to renewable energy remained low in June 2019 at 3%, with only 1% strongly opposed. Levels of support and opposition have remained relatively steady since the question was first asked in March 2012.

Figure 2: Whether support or oppose renewable energy, 2012 to 2019



Q3. Do you support or oppose the use of renewable energy for providing our electricity, fuel and heat?

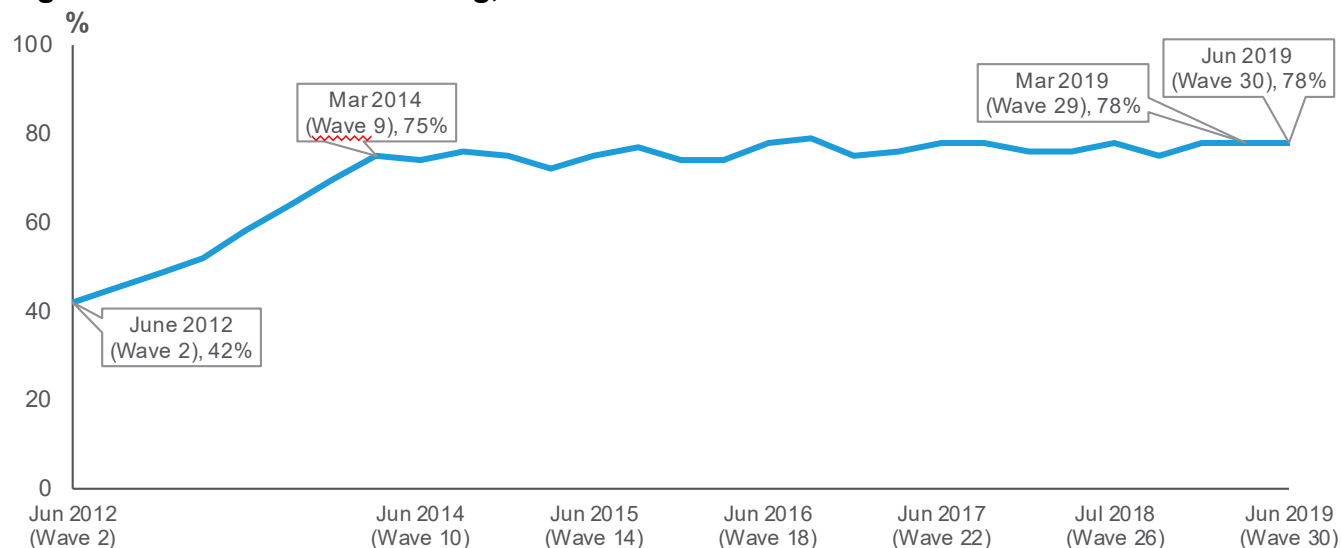
Base: All wave respondents. (Asked quarterly.) See technical appendix for base sizes.

Support for renewables was highest among men (85%, compared with 79% of women), those in social grades AB (92%, compared with 73% of those in social grades DE), and those with household incomes of £50,000 or more (90%, compared with 77% of those with household incomes under £16,000).

Shale gas

In June 2019, awareness of fracking remained stable at 78%. Levels of awareness of fracking have remained between 70% and 80% for the last five and a half years, following an increase between June 2012 (42%) and March 2014 (75%). A small proportion of people claimed to know a lot about it (12%), with 22% claiming to have never heard of it.

Figure 3: Awareness of fracking, 2012 to 2019



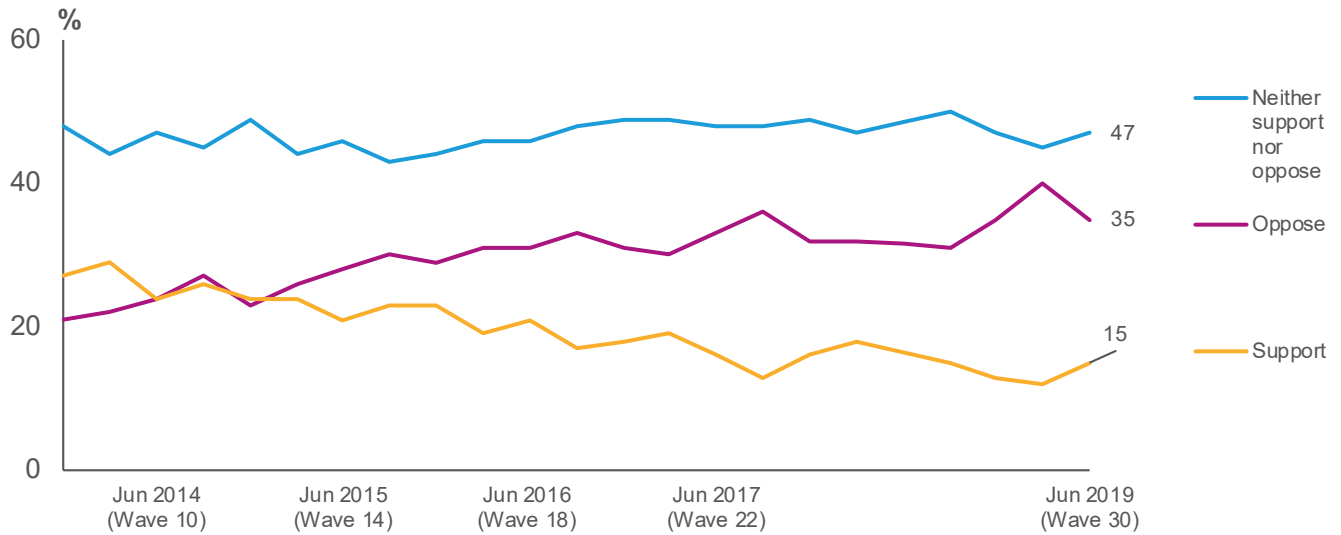
Q15a. Before today, how much, if anything, did you know about hydraulic fracturing for shale gas, otherwise known as fracking?

Bases: All wave respondents – June 2012, March 2013, December 2013 to June 2019. (Asked quarterly.) See technical appendix for base sizes.

Awareness of fracking was highest among men (82%, compared with 74% of women), those aged 65 and over (90%, compared with 61% of those aged 16 to 24), those in social grades AB (87%, compared with 65% of those in social grades DE), and those with household incomes of £50,000 or more (87%, compared with 71% of those with household incomes under £16,000). People living in the South West (90%), North West (88%) and Wales (87%) were also more likely to be aware of fracking, compared with those living in the East of England (64%) and London (65%).

The proportion of people opposed to fracking decreased to 35% in June 2019, down from its highest point across the tracker in March 2019 (40%). Support for fracking increased from 12% in March 2019 to 15% in June 2019. The proportion that neither support nor opposed fracking remained steady at 47%, with a further 4% saying they did not know whether they supported or opposed it.

Figure 4: Whether support or oppose fracking, 2014 to 2019



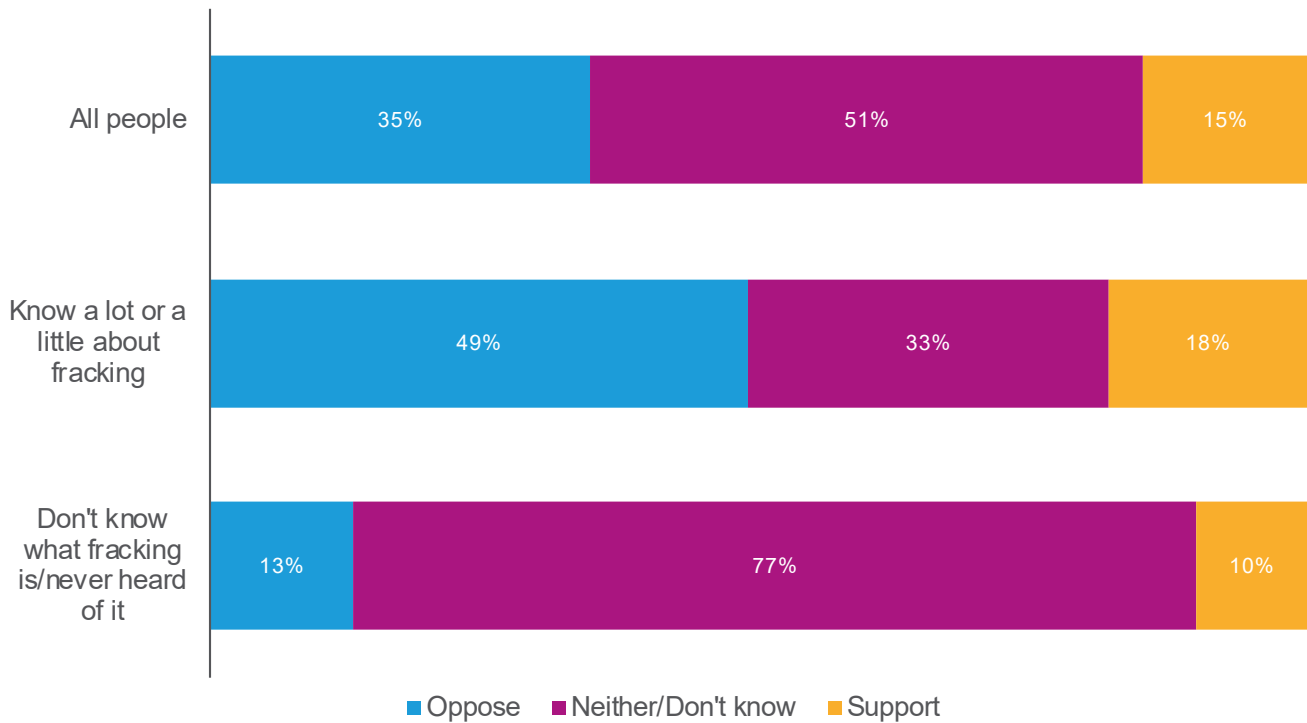
Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

Bases: All wave respondents – Asked all waves from December 2013 to June 2019 apart from July 2018. See technical appendix for base sizes.

Opposition toward fracking was higher among those in social grades AB (42%, compared with 27% of those in social grades DE), and those living in Scotland (47%), the South West (44%), Yorkshire and the Humber (41%), and the North West (40%). It was lowest among those living in the East of England (28%), London (28%), and the North East (29%).

Levels of support for fracking differed based on how much people said they knew about it. Among those who said they knew a lot or a little about fracking, 18% of people said they supported it and 49% said they opposed it. The majority of those who knew less about fracking said they neither supported nor opposed it (77%), with 10% supporting and 13% opposing.

Figure 5: Levels of support of fracking, by levels of fracking knowledge, June 2019



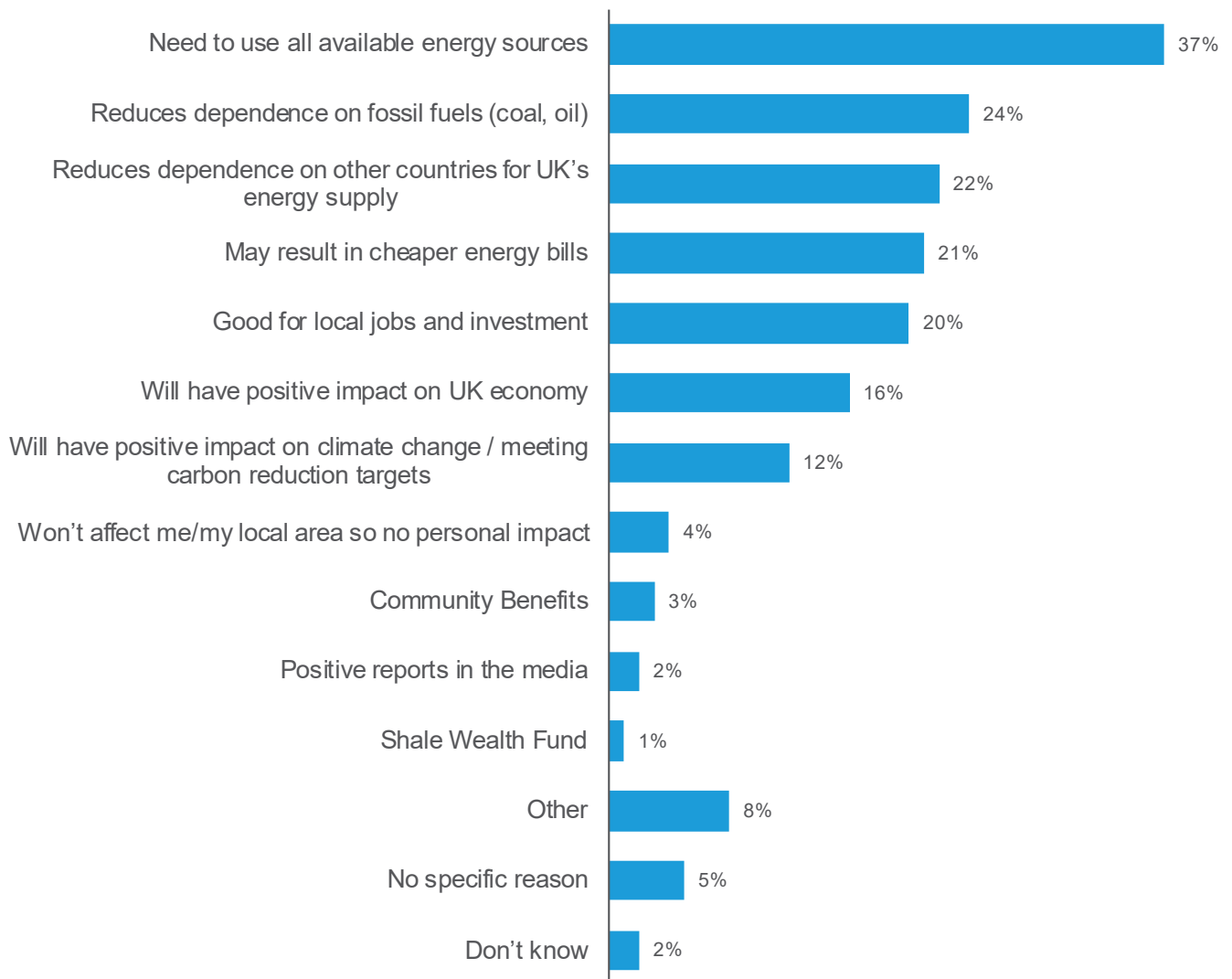
Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

Base: All wave respondents (4,231); Know a lot or a little (2,459); Don't know what it is/Never heard of it (1,772).

Follow up questions were then asked to determine why people support, oppose or are neutral about fracking.

In June 2019, the most common reasons for supporting fracking were the need to use all available energy sources (37%), reducing the dependence on fossil fuels (24%, down from 33% in March 2019), reducing the dependence from other countries for the UK's energy supply (22%), that it may result in cheaper energy bills (21%), and being good for local jobs and investment (20%).

Figure 6: Reasons for supporting fracking, June 2019

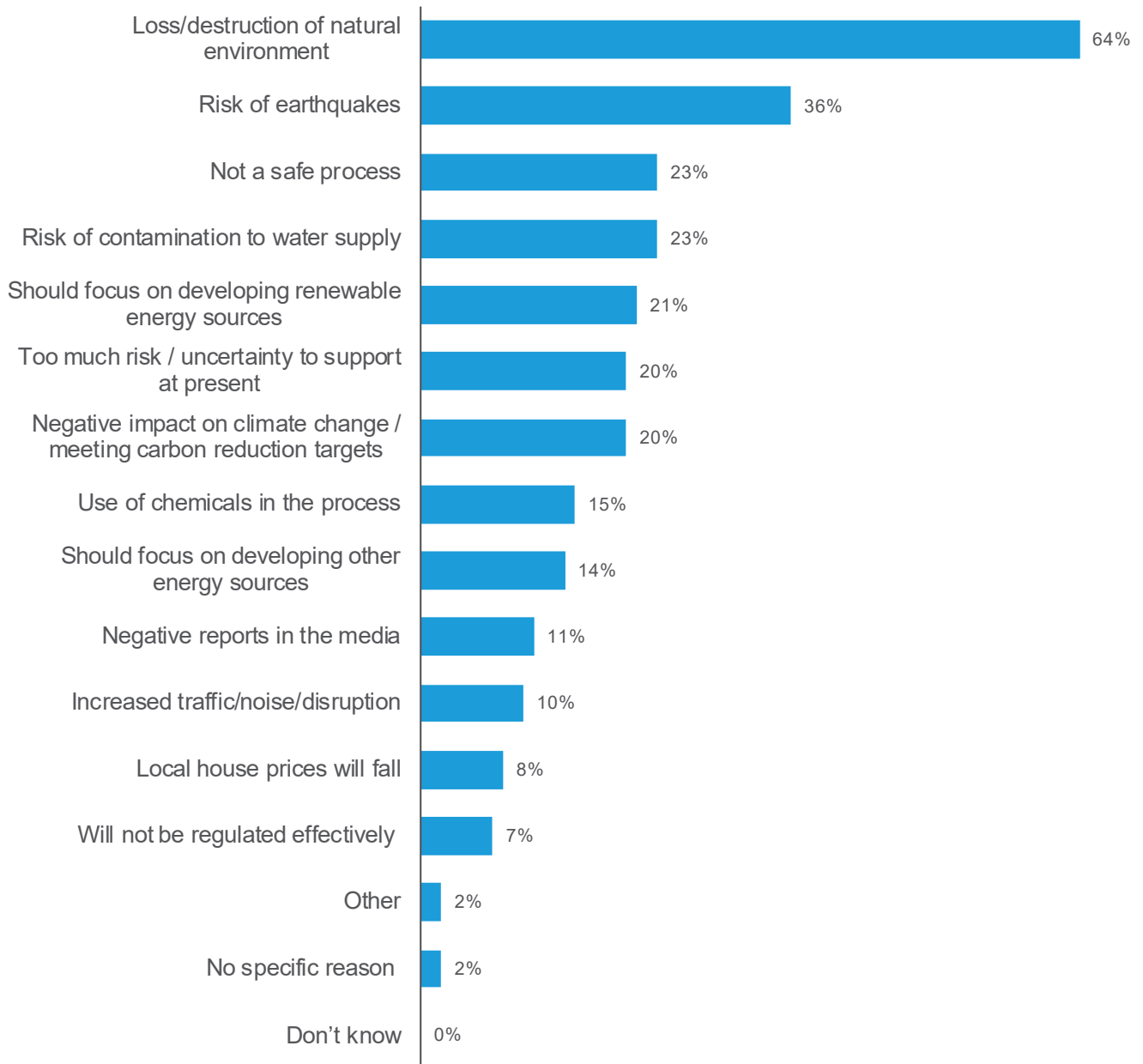


Q15c. You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?

Base: All who support fracking – June 2019 (632).

The main reason for opposing fracking was the loss and destruction of natural environment (64%, up from 57% in March 2019). Other common reasons mentioned were concerns about the risk of earthquakes (36%, down from 45% in March 2019), fracking not being a safe process (23%, down from 29% in March 2019) and the risk of contamination to the water supply (23%).

Figure 7: Reasons for opposing fracking, June 2019



Q15d. You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?

Base: All who oppose fracking – June 2019 (1,412).

The main reason for neither supporting nor opposing fracking is that respondents did not know enough about it (76%).

Consumer markets

Shopping around

In June 2019, the public were asked if they had taken out a range of different products and services in the last 12 months. The products most commonly taken out were car insurance (35%) and home insurance (23%). The products least commonly taken out were pay TV (4%), a current account (4%) and a mortgage (4%). These findings are consistent with those observed when the question was last asked in July 2018.

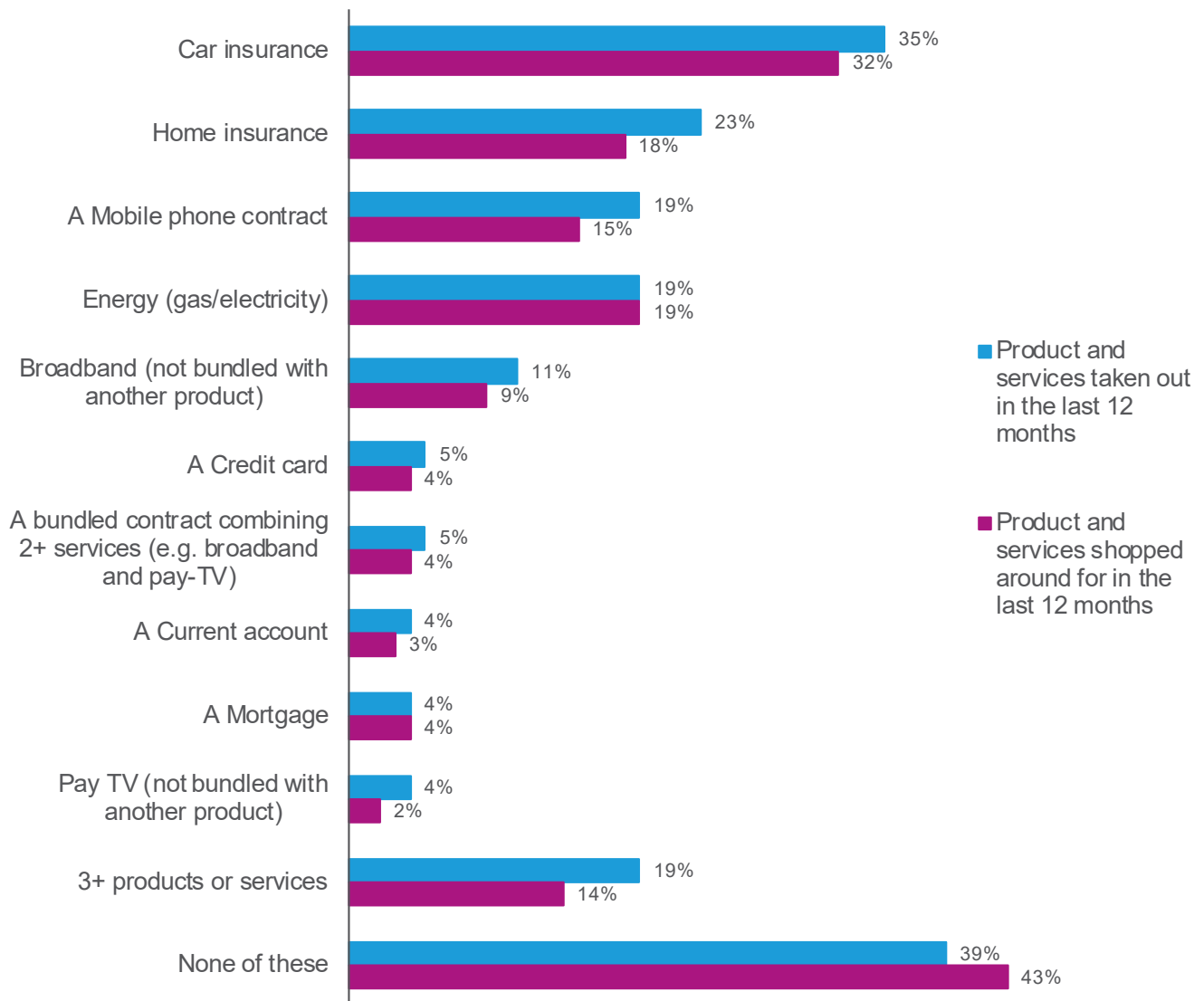
Two in ten (19%) had taken out three or more products in the last 12 months, while four in ten (39%) had not taken any out any products and services.

The public were also asked if they had personally shopped around for the same range of products and services in the last 12 months. They were most likely to have shopped around for car insurance (32%), followed by energy (19%) and home insurance (18%). They were least likely to have shopped around for a current account (3%) and pay TV (2%).

In June 2019, 14% had shopped around for three or more products and services in the last 12 months, while 43% had not shopped around for any products and services. Those more likely to shop around for three or more products included those with household incomes of at least £50,000 (33%, compared with 6% of those with household incomes under £16,000), those in social grades AB (22%, compared with 5% of those in social grades DE) and home owners (18%, compared with 10% of private renters and 5% of social renters).³

³ There is a similar pattern for those who have taken out products and services.

Figure 8: Products and services taken out and shopped around for in the last 12 months, June 2019



Q90. Which of these products or services have you taken out in the last 12 months? This includes making a new purchase, switching providers, upgrading or renewing existing deals. / Q91. Which, if any, of these products or services have you personally shopped around for in the last 12 months? Please include shopping around you did online, by telephone, or in person.

Base: All wave respondents – June 2019 (4,231).

As Figure 8 shows, there is a strong relationship between taking out products and services and shopping around for them. This is perhaps unsurprising as the products and services taken out more frequently by the public will likely be those that the public also shop around for more frequently.

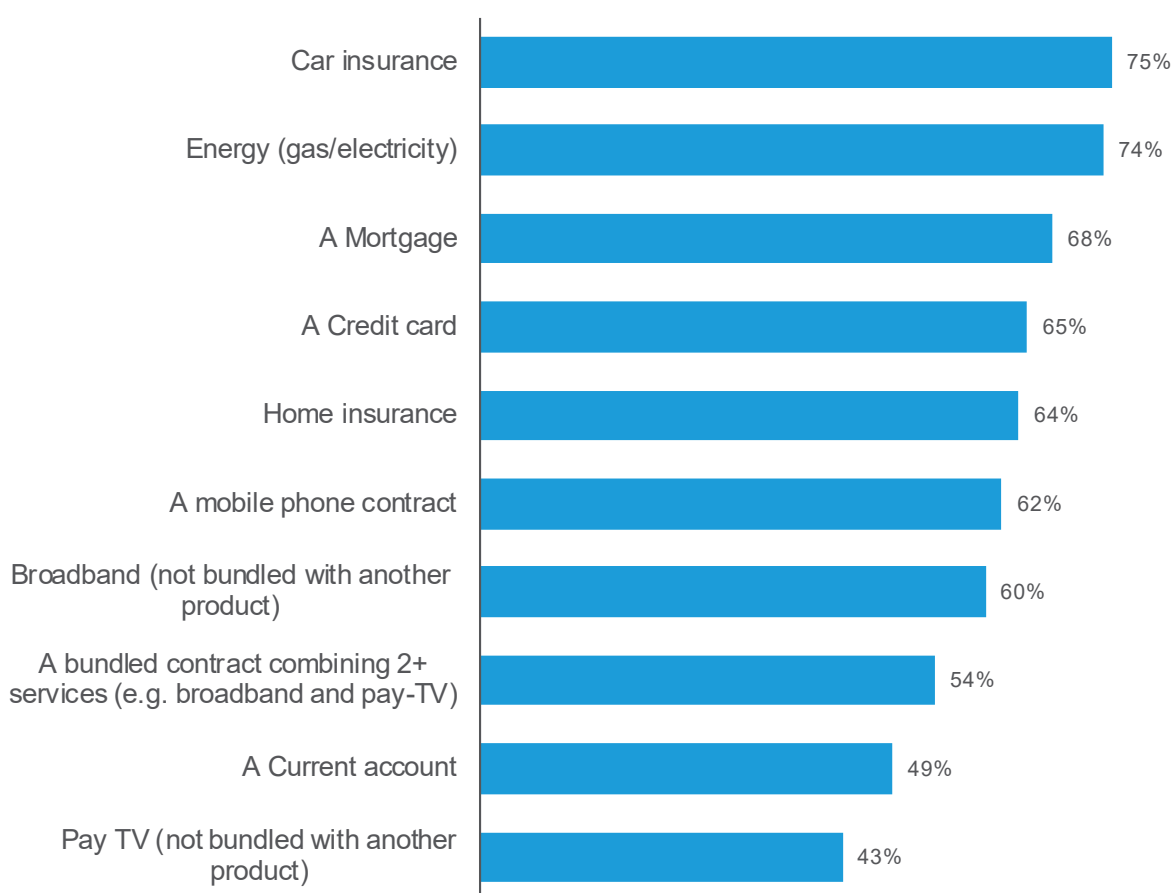
To provide an indication of the propensity for the public to shop around when making different purchases, Figure 9 shows the proportion who shopped around for each product or service based only on those who took out this product and service in the last 12 months.

This shows that shopping around for products taken out in the last year was most common for car insurance (75%), energy (74%) and mortgages (68%), and least common for bundled contracts combining two or more services (54%), current accounts (49%) and pay TV (43%).

There are some differences when comparing results with July 2018. In June 2019, people were more likely to shop around for credit cards (65% versus 53%), bundled contracts combining two or more services (54% versus 43%) and current accounts (49% versus 38%).

There are some notable differences in the proportions of people to shop around for different products and services based on Figures 8 and 9. These largely relate to how frequently products or services are taken out. For example, only 4% of people had shopped around for mortgages in the last 12 months (Figure 8), suggesting that this is a rare activity. However, Figure 9 shows that 68% of people who had taken out a mortgage in the last 12 months had shopped around for one. This shows that while taking out mortgages is a much rarer activity than some other products or services, when they are taken out most people do shop around.

Figure 9: Whether shopped around for product or service based on those who have taken out each product or service in the last 12 months, June 2019



Q90. Which of these products or services have you taken out in the last 12 months? This includes making a new purchase, switching providers, upgrading or renewing existing deals. / Q91. Which, if any, of these products or services have you personally shopped around for in the last 12 months? Please include shopping around you did online, by telephone, or in person.

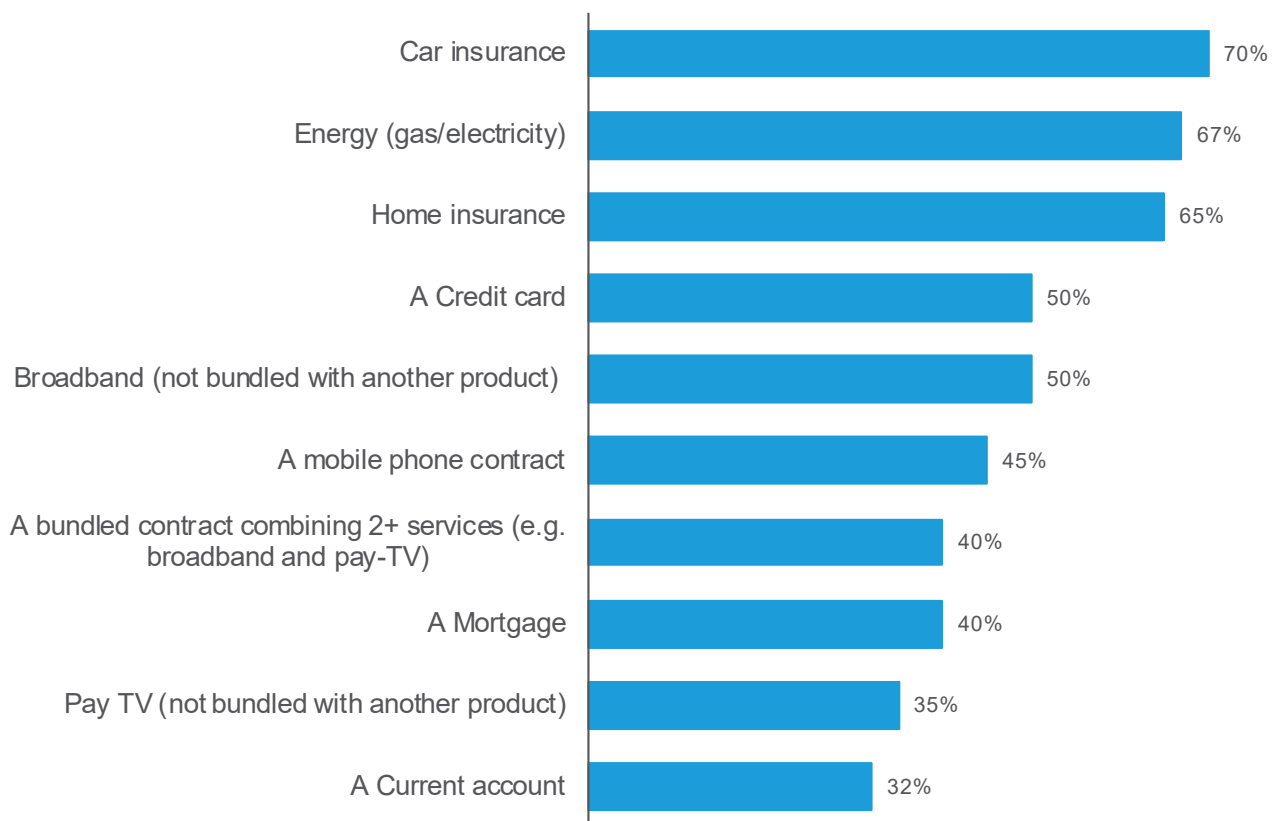
Base: All to take out each product or service in the last 12 months – June 2019: Car insurance (1,336); Energy (772); Mortgage (115); Credit card (176); Home insurance (873); Mobile phone contract (699); Broadband (not bundled) (427); Bundled contract (190); Current account (150); Pay TV (147).

How people shop around

In June 2019, the public mainly shopped around by using online price comparison websites or apps, by visiting websites of individual providers or suppliers, by phoning or emailing the provider or supplier directly, and by using consumer websites such as Which? and Moneysavingexpert.com.

Figure 10 shows that online comparison sites or apps were most commonly used when shopping around for car insurance (70%), energy (67%) and home insurance (65%). These findings are similar to those observed in July 2018.

Figure 10: Whether use price comparison site to shop around by product or service shopped around for in last 12 months, June 2019



Q92. Please think about the last time you shopped around for [PRODUCT] in the last 12 months. In which ways did you shop around for [PRODUCT]?

Base: All to take out each product or service in the last 12 months – June 2019: Car insurance (1,152); Energy (730); Home insurance (663); Credit card (148); Broadband (not bundled) (358); Mobile phone contract (543); Bundled contract (130); Mortgage (105); Pay TV (89); Current account (108).

Why people don't shop around

Those who had taken out products without shopping around were asked why they did not shop around for them.

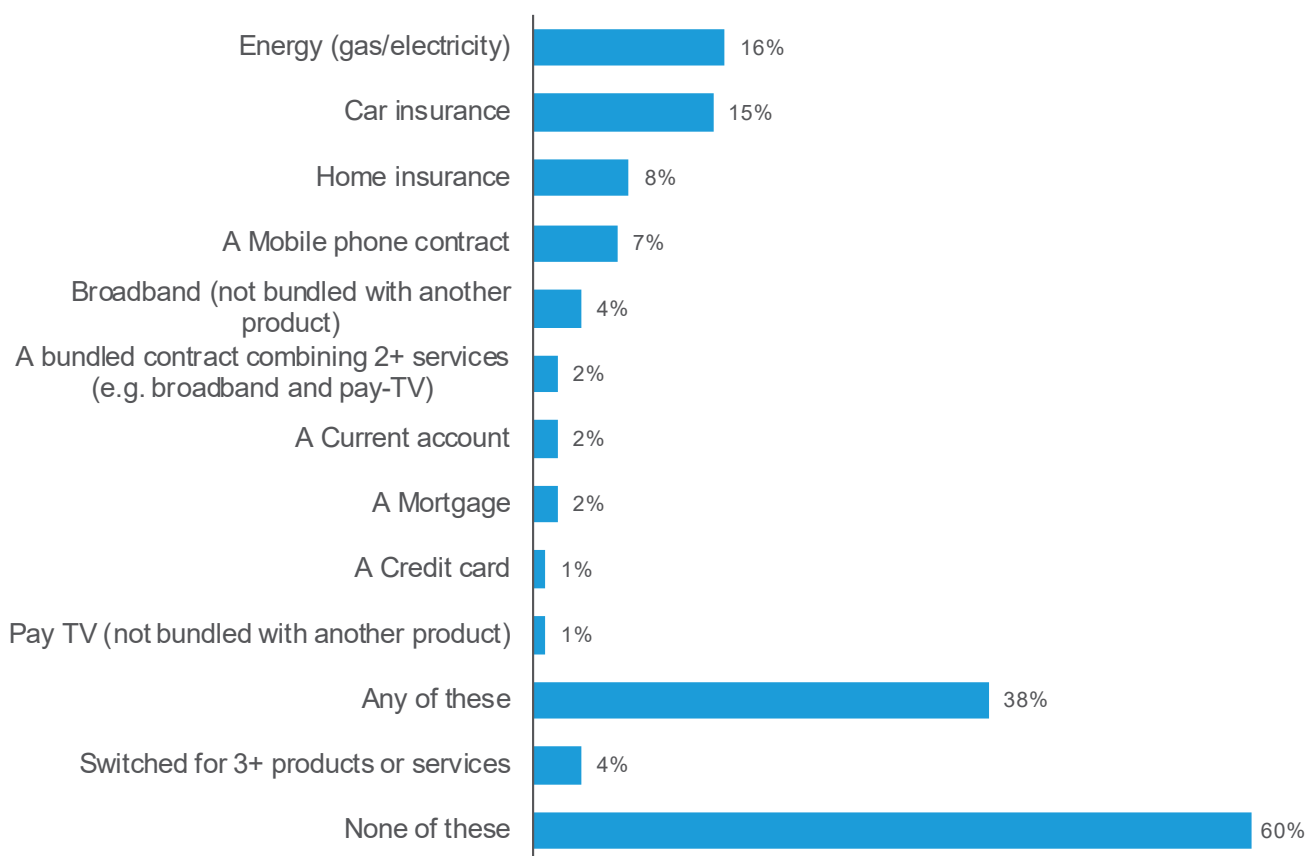
The main reasons were because the offer from the provider was just what they wanted (ranging from 8% for a current account to 35% for bundled contracts), it took too much time or effort (ranging from 11% for bundled contracts to 20% for energy providers) or because they felt loyalty to their provider or had an established relationship with them (ranging from 9% for energy providers to 20% for a current account). These reasons were consistent with those observed in July 2018.

Switching

In June 2019, people were most likely to have switched provider or contract for energy (16%) and car insurance (15%) and least likely to have switched pay TV (1%) and credit card (1%) providers or contracts. These findings are consistent with those observed in July 2018.

Four in ten (38%) had switched at least one product or service in the last 12 months, and 4% had switched at least three. Six in ten (60%) of the public had not switched providers or contracts for any of these products or services in the last 12 months.

Figure 11: Whether switched provider or contract for products or services in the last 12 months, June 2019

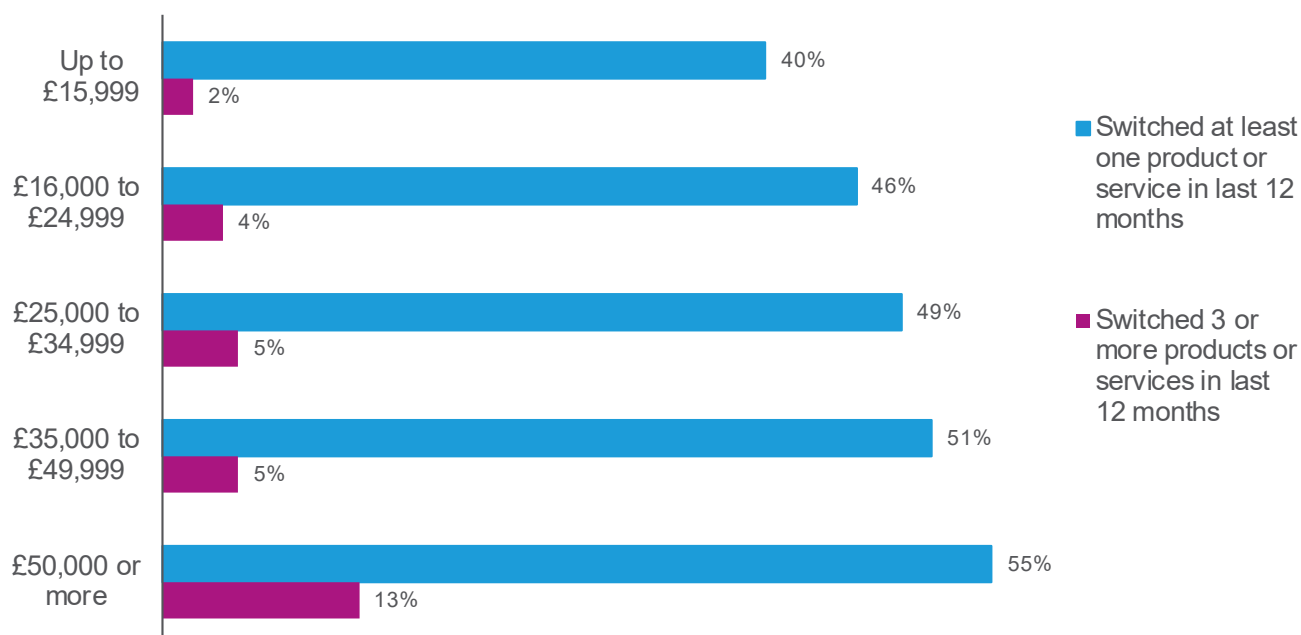


Q94. In the last 12 months, that is since [July 2018], have you switched provider or contract for any of these products or services?

Base: All wave respondents – June 2019 (4,231).

As Figure 12 shows, people with higher household incomes were more likely to have switched a product or service (55% for those with household incomes of £50,000 or more, compared with 40% for those with household incomes under £16,000) and to have switched three or more products and services (13% of those with household incomes of £50,000 or more, compared with 2% of those with household incomes under £16,000). This was also the case for those in higher social grades and home owners. Nearly half (47%) of those in social grades AB had switched a product or service (compared with 27% of those in social grades DE); and 42% of home owners had switched a product or service, compared with 33% of private renters and 28% of social renters.

Figure 12: Switching rate for any products and services and 3+ products and services by household income, June 2019



Q94. In the last 12 months, that is since [July 2018], have you switched provider or contract for any of these products or services?

Base: All wave respondents with household incomes up to £15,999 (805); £16,000 to £24,999 (519); £25,000 to £34,999 (397); £35,000 to £49,999 (355); and £50,000 or more (345).

Reasons for not switching

The main reason why people did not switch providers or contracts in the last 12 months was because they were happy with their current provider or contract. This ranged from 75% to 91% across all products or services. These findings are consistent with those observed in July 2018.

Ease of switching

People who had switched provider or contract for a product or service in the last 12 months were asked:

- How easy or difficult it was to exit the previous contract
- How easy or difficult it was to find a new provider or contract
- Whether they experienced any problems during the switching process once a new provider or contract was selected

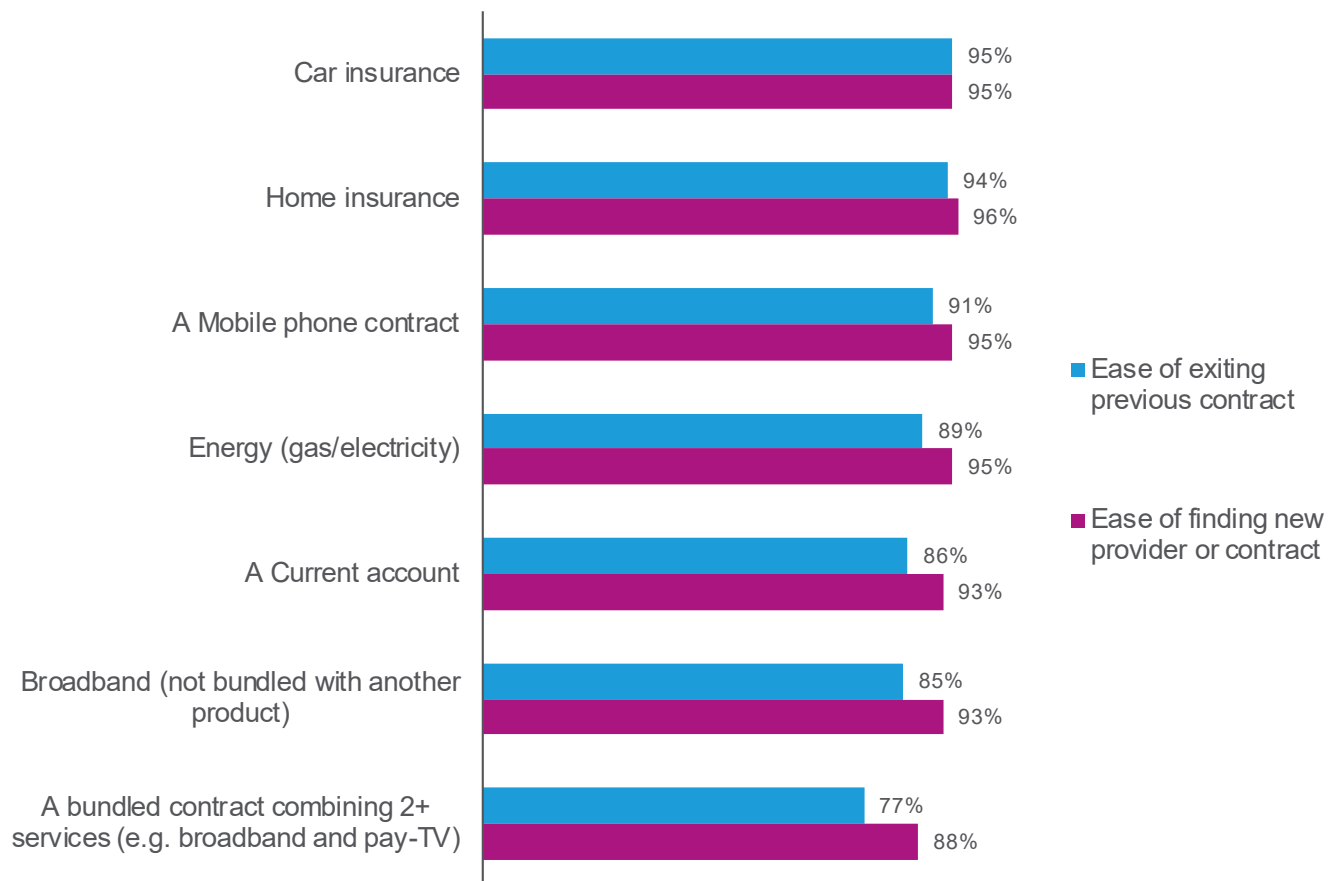
Due to the low incidence of those that switched provider or contract for a product or service, it is not possible to report robustly on these questions for each type of provider. We therefore limit this analysis to providers where at least 50 respondents experienced a problem: energy

(624 respondents); car insurance (570); home insurance (292); mobile phone (273); Broadband (not bundled) (174); and bundled contracts (68).

In June 2019, the public generally found it easy (either very or fairly) to exit their previous contract across all product or services, ranging from 77% for a bundled contract combining two or more services to 95% for car insurance.

The public also found it easy (either very or fairly) to find a new provider or contract, ranging from 88% for a bundled contract to 95% for car insurance, a mobile phone contract and energy and 96% for home insurance.

Figure 13: Proportion saying it was easy to exit a previous contract and to find new provider or contract, June 2019



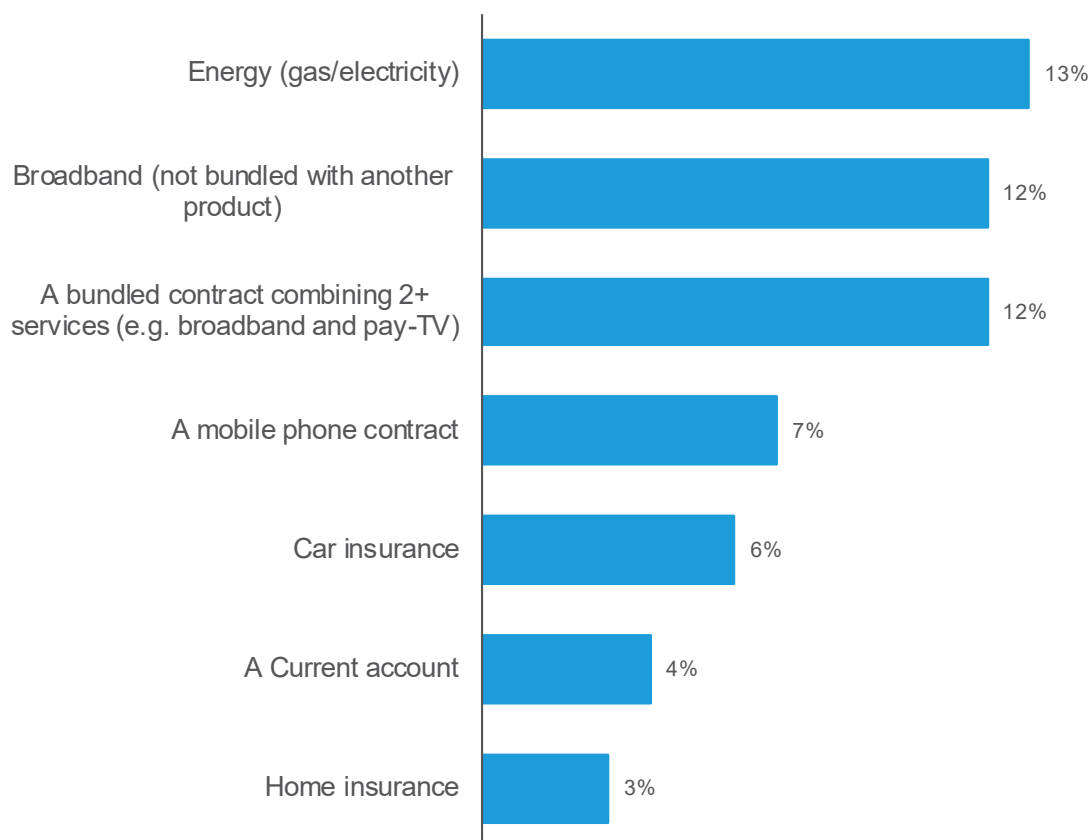
Q97. How easy or difficult did you find it to exit the previous contract? / Q98. How easy or difficult was it for you to find a new provider or contract?

Base: All wave respondents to switch provider or contract for each product or service in the last 12 months – Car insurance (570); Home insurance (292); Mobile phone provider (273); Energy (624); Current account (59); Broadband (not bundled) (174); Bundled contract (68).

The following have not been included due to having a small base size: Credit card (48); Mortgages (47); Pay TV (38).

People rarely experienced problems during the switching process once they selected a new provider or contract. Where they did, people were more likely to experience problems when switching energy provider (13%), broadband provider (12%), or switching contracts for a bundle combining two or more services (12%). Very few people experienced problems when switching a current account (4%) or home insurance (3%).

Figure 14: Whether experienced any problems during the switching process once a new provider or contract was selected, June 2019



Q99. Did you experience any problems during the switching process once you selected a new provider or contract?

Base: All wave respondents to switch provider or contract for each product or service in the last 12 months – Energy (624); Broadband (not bundled) (174); Bundled contract (68); Mobile phone provider (273); Car insurance (570); Current account (59); Home insurance (292).

The following have not been included due to having a small base size: Credit card (48); Mortgages (47); Pay TV (38).

Consumer rights

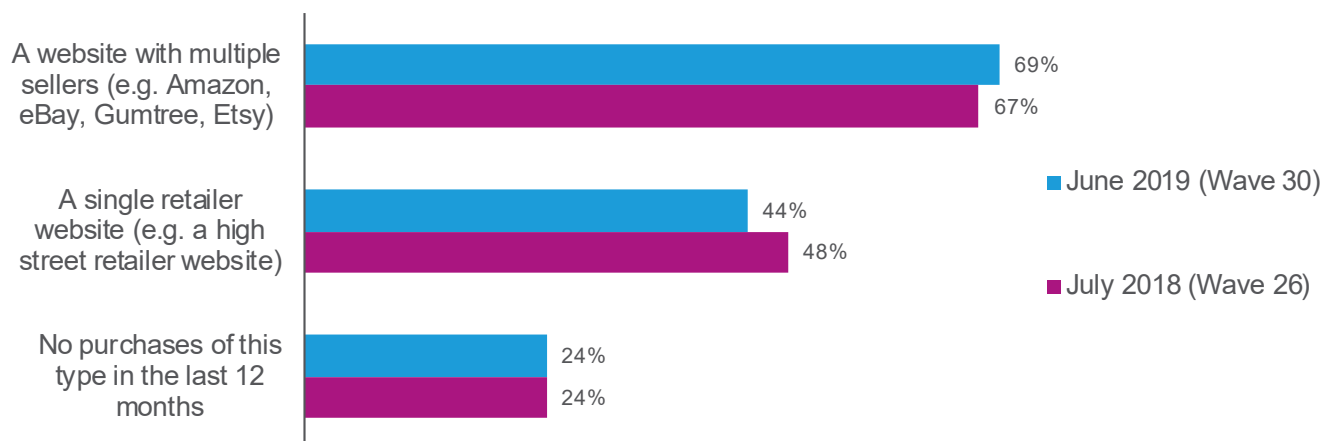
Use of websites and online services

The public were asked if they had purchased anything from two different types of websites in the last 12 months:

- A website with multiple sellers (e.g. Amazon, eBay, Gumtree, Etsy)
- A single retailer website (e.g. a high street retailer website)

In June 2019, seven in ten (69%) had purchased from a website with multiple sellers, a similar proportion to July 2018 (67%). Over four in ten (44%) had purchased from a single retailer website, a decrease from July 2018 (48%). A quarter (24%) had not purchased from either of these types of website in the last 12 months, unchanged from July 2018.

Figure 15: Whether bought anything from multiple or single retailer websites in last 12 months, July 2018 to June 2019

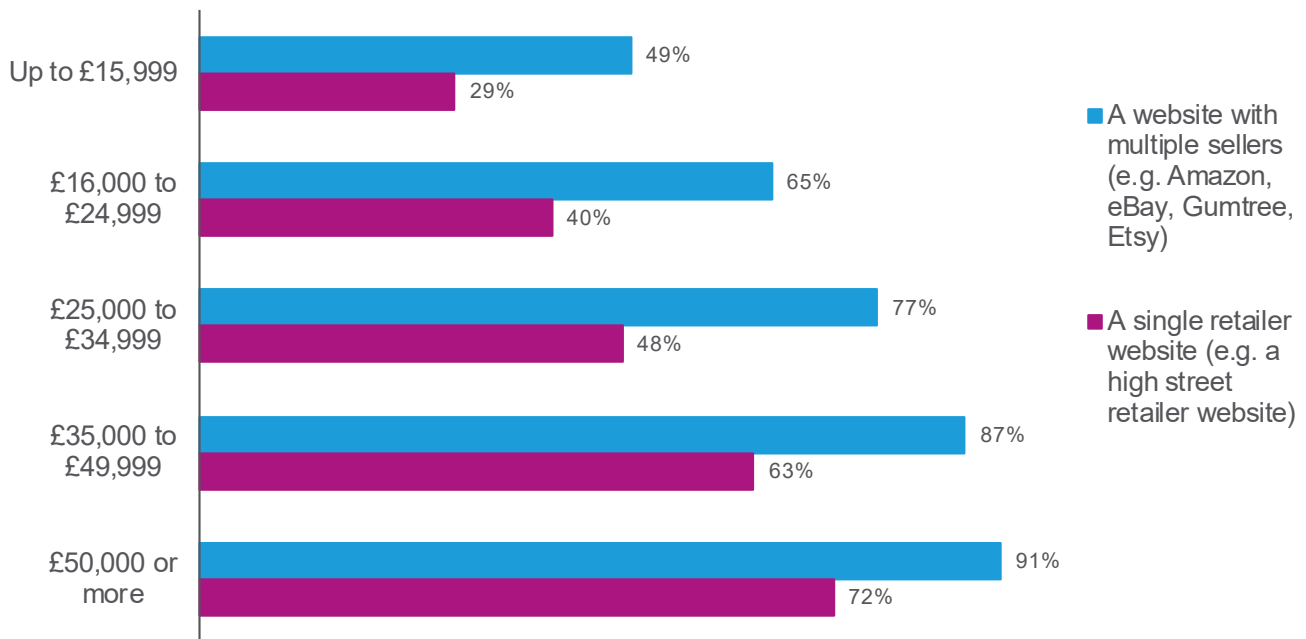


Q110. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents – July 2018 to June 2019. (Asked annually.) See technical appendix for base sizes.

There were some notable differences between demographic groups in their likelihood to purchase from these websites. As Figure 16 shows, those with higher household incomes were more likely to have purchased from both multiple retailer websites (91% of those with household incomes of £50,000 or more, compared with 49% of those with household incomes under £16,000) and single retailer websites (72% of those with household incomes over £50,000, compared with 29% of those with household incomes under £16,000). This was also the case for those in higher social grades. Those in social grades AB were more likely to have purchased from a multiple retail website (84%, compared with 47% of those in social grades DE) and a single retail website (62%, compared with 25% in social grades DE).

Figure 16: Whether bought anything from multiple or single retailer websites in last 12 months, by household income, June 2019



Q110. Which, if any, of the following online services have you used in the last 12 months?

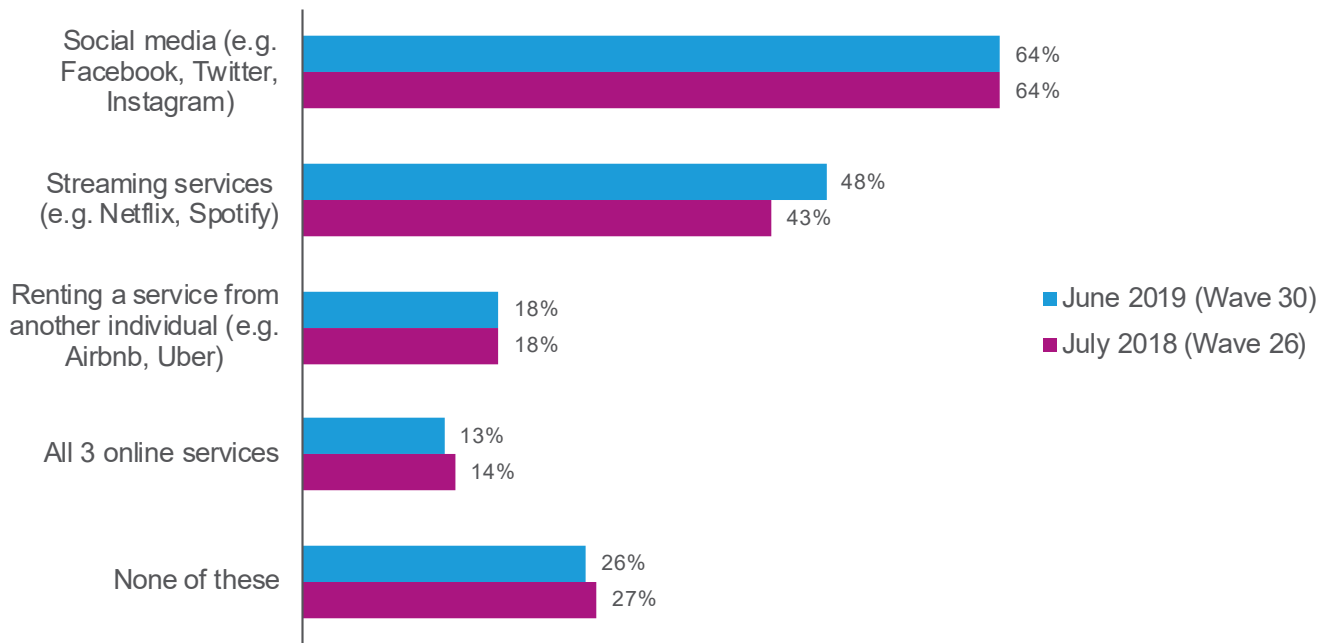
Base: All wave respondents with household incomes up to £15,999 (805); £16,000 to £24,999 (519); £25,000 to £34,999 (397); £35,000 to £49,999 (355) and £50,000 or more (345).

The public were also asked whether they had used a range of online services over the last 12 months:

- Social media (e.g. Facebook, Twitter, Instagram)
- Streaming services (e.g. Netflix, Spotify)
- Renting a service from another individual (e.g. Airbnb, Uber)

In June 2019, the public were most likely to use social media (64%), followed by streaming services (48%, up from 43% in July 2018) and renting services (18%). Around one in eight people (13%) had used all three online services in the last 12 months, while 26% had not used any of these services.

Figure 17: Online services used in last 12 months, July 2018 to June 2019

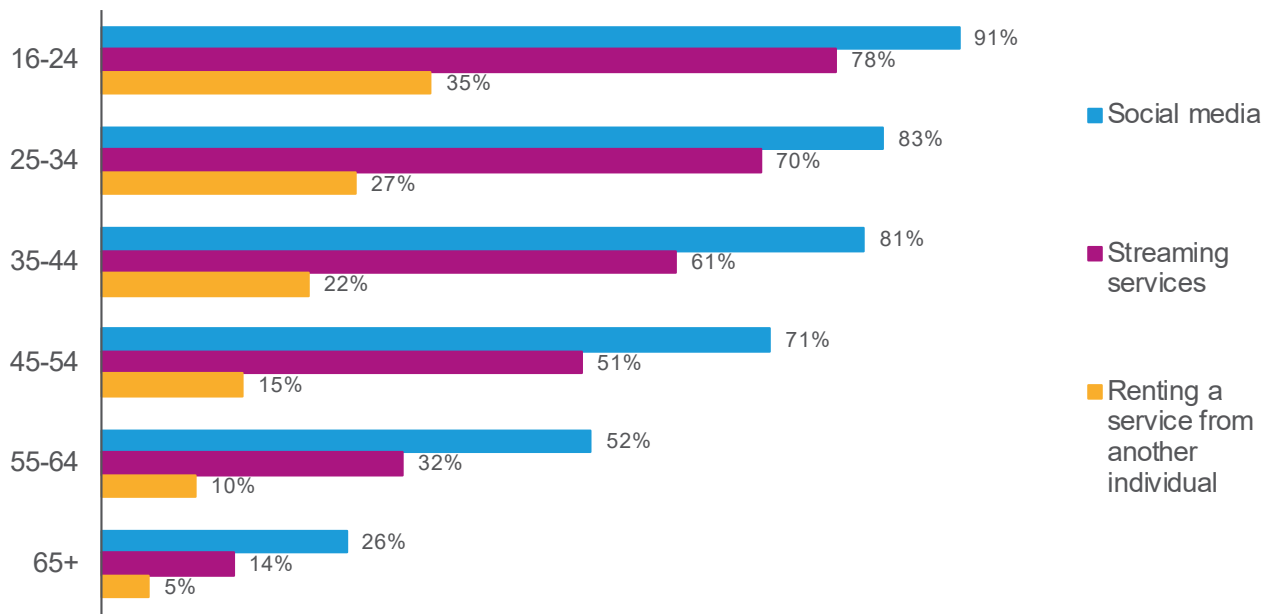


Q111. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents – July 2018 to June 2019. (Asked annually.) See technical appendix for base sizes.

There were age differences in use of these online services. For all three online services, levels of use were highest in the youngest age group and dropped as age increased.

Figure 18: Online services used in last 12 month, by age, June 2019

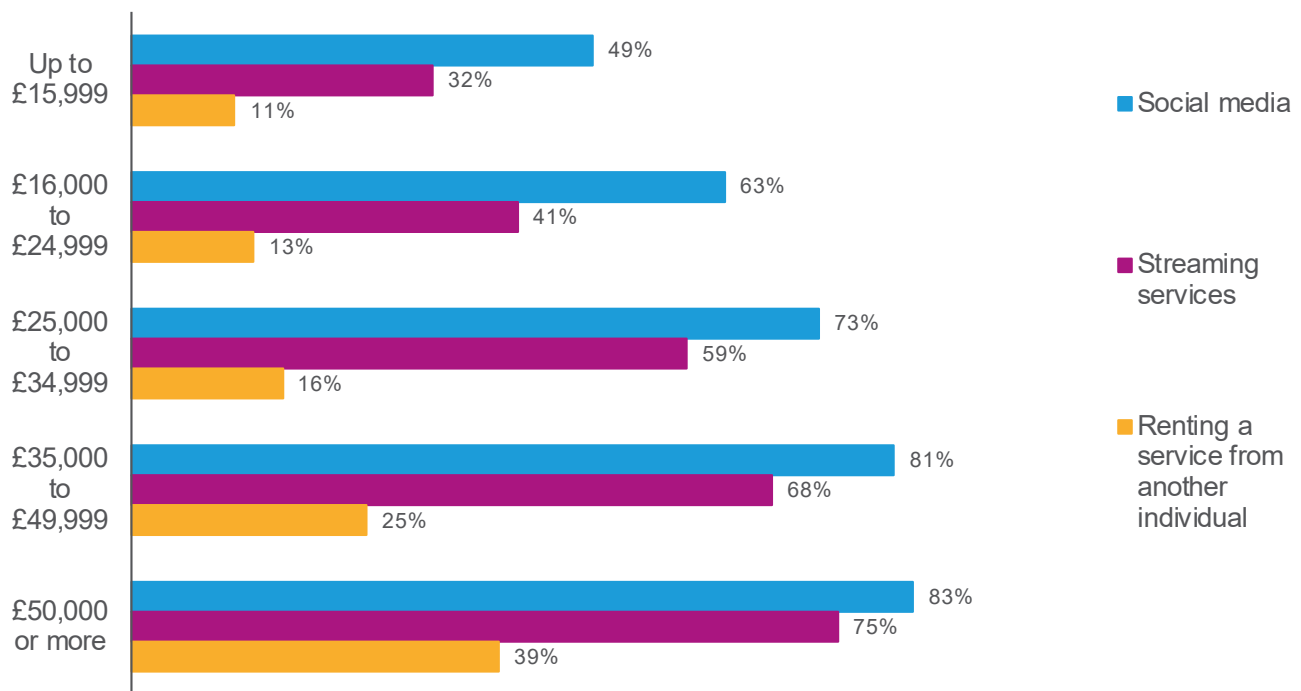


Q111. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents aged 16-24 (504); 25-34 (683); 35-44 (569); 45-54 (544); 55-64 (588); 65+ (1,343).

Those with higher household incomes were also more likely to use all three of the online services than those with lower household incomes.

Figure 19: Online services used in last 12 months, by household income, June 2019



Q111. Which, if any, of the following online services have you used in the last 12 months?

Base: All wave respondents with household incomes up to £15,999 (805), £16,000 to £24,999 (519); £25,000 to £34,999 (397); £35,000 to £49,999 (355) and £50,000 or more (345).

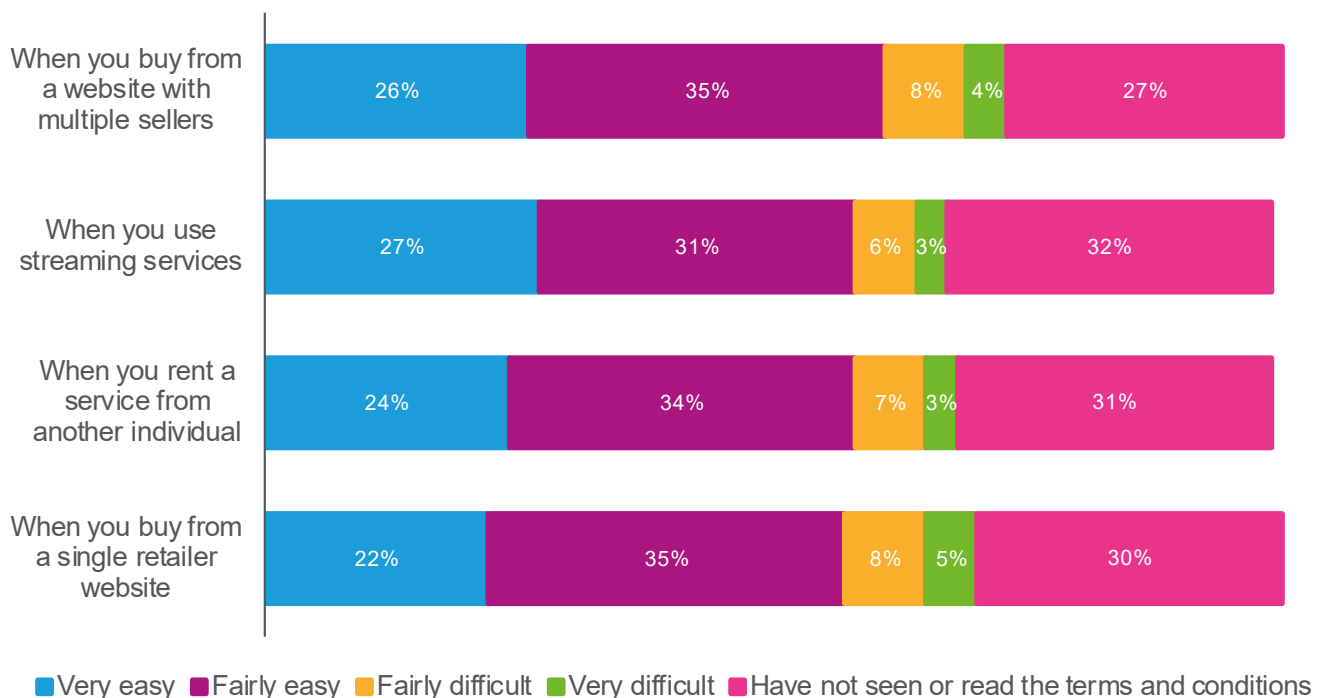
Understanding terms and conditions and privacy notices

Follow-up questions were asked of those who had bought something online or who had used online services (either streaming services or renting a service from another individual) in the last 12 months, to determine how easy or difficult they found it to understand their terms and conditions.

Around six in ten claimed that it was easy (very or fairly) to understand the terms and conditions of each product or service, with ease of understanding increasing for websites with multiple sellers, single retailer websites and renting a service from another individual since July 2018: 61% for websites with multiple sellers (up from 55% in July 2018); 57% for single retailer websites (up from 53% in July 2018); 59% for renting a service from another individual (up from 53% in July 2018). Ease of understanding the terms and conditions for streaming services saw a slightly smaller (but statistically insignificant) increase from 55% in July 2018 to 58%.

Around one in ten found it difficult (very or fairly) to understand the terms and conditions for all products and services: 13% when buying from a single retailer website, 12% when buying from a website with multiple sellers; 11% when renting a service from another individual; and 10% when using streaming services. Around three in ten (ranging from 27% for those buying from a website with multiple to sellers to 32% for those using streaming services) said they had not seen or did not read the terms and conditions.

Figure 20: Ease of understanding terms and conditions when purchasing or using services online, June 2019



Q112. I'm now going to ask you some questions about terms and conditions when you buy products and services online. Terms and conditions provide customers with additional information regarding the product or service they are purchasing and their rights if something goes wrong. How easy or difficult have you found it to understand the terms and conditions...

Base: All wave respondents to purchase from multiple retailer websites (2,593); single retailer websites (1,627); use streaming services (1,764); rent a service from another individual (623).

Those who had used social media in the last 12 months were asked how easy or difficult it was to understand privacy notices for the social media platforms used. Six in ten users (59%) found it easy (very or fairly) to understand privacy notices, while 17% found it difficult (very or fairly) to understand privacy notices, a decrease from 23% in July 2018. Over two in ten (23%) had not seen or read privacy notices, an increase from 18% in July 2018.

Those aged 16 to 24 were more likely to find it easy to understand privacy notices, while those aged 65 and over were least likely to find it easy (70% versus 50%). Those in social grades DE and those with household incomes under £16,000 were also more likely to say that privacy notices were easy to understand (64% for those in social grades DE, compared with 54% of those in social grades AB; and 64% for those with household incomes under £16,000, compared with 57% of those with household incomes of £50,000 and over).

Consumer protection

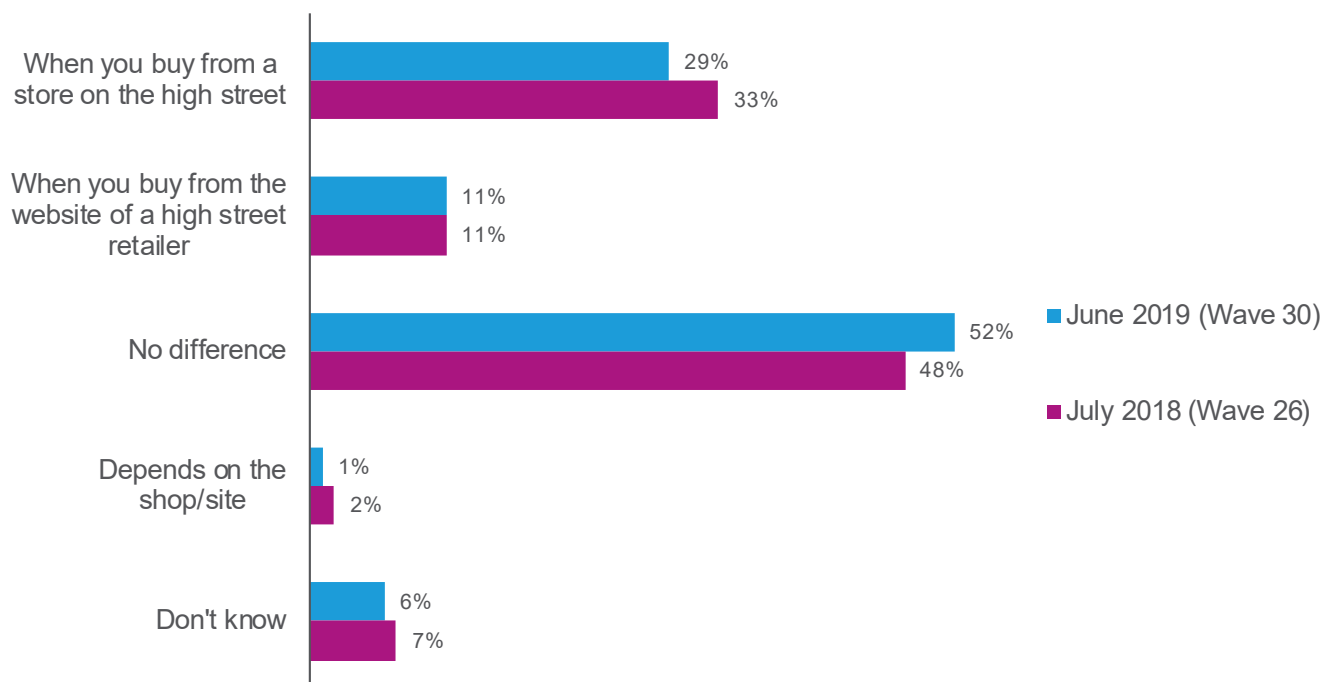
In June 2019, the public were asked who offered the best consumer rights protection:

- A store on the high street or the website of a store on the high street
- The website of a store on the high street or a private seller online

Consumers have similar protections whether purchasing goods from a high street retailer or a retailer online, although they do have enhanced rights on returns for online purchases.⁴ In June 2019, over half (52%) felt there was no difference. The public were more likely to feel that they were offered better protection in terms of their consumer rights when buying from a store on the high street (29%), than when buying from the website of a high street retailer (11%).

⁴ Purchases made online can be returned within 14 days as consumers have not had the chance to physically inspect them.

Figure 21: Whether buying from a website of a high street retailer or buying from a store on the high street offers the best protection in terms of consumer rights, July 2018 to June 2019



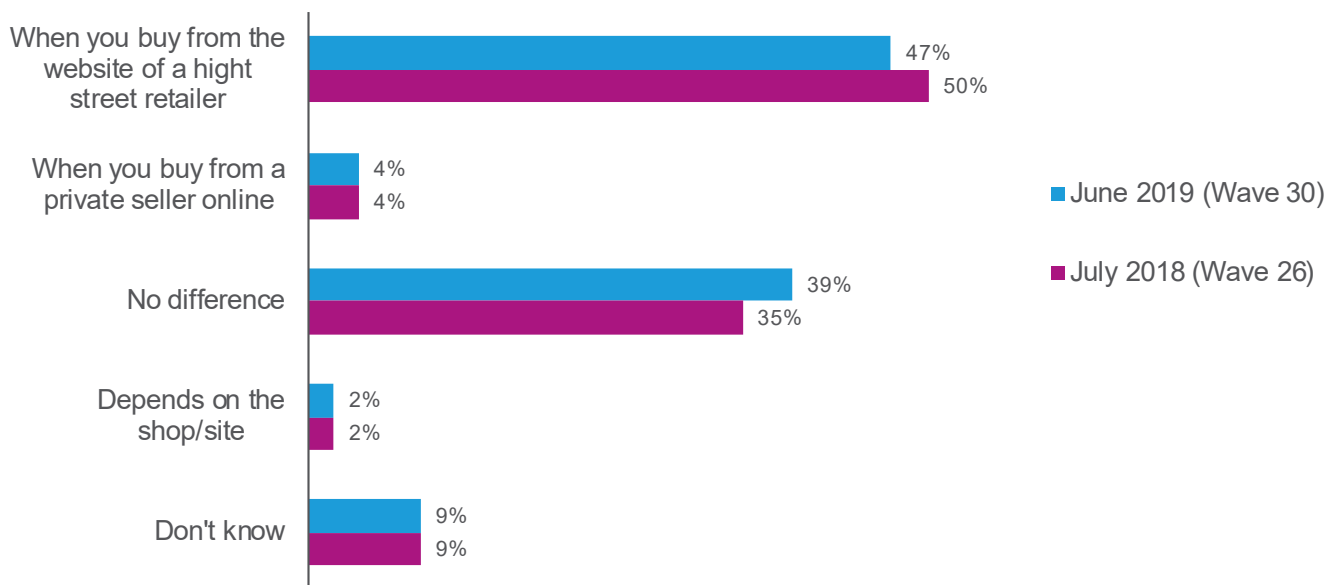
Q114. Which of the following do you think offers the best protection in terms of your consumer rights?

Base: All wave respondents – July 2018 to June 2019. (Asked annually.) See technical appendix for base sizes.

In general, the rights of a consumer are reduced when engaging in a transaction with a private seller, compared with a business online.⁵ In June 2019, the public were far more likely to think that buying from the website of a high street retailer (47%) offered better protection than buying from a private seller online (4%). Four in ten (39%) felt there was no difference, an increase from July 2018 (35%).

⁵ This reduction largely occurs when considering the rights related to the price and quality of the good/service, and the timeliness in which a service is provided. There are also some limited protections in consumer to consumer transactions with regards to redress if a product or service is faulty.

Figure 22: Whether buying from a website of a high street retailer or buying from a private seller online offers the best protection in terms of consumer rights, July 2018 to June 2019



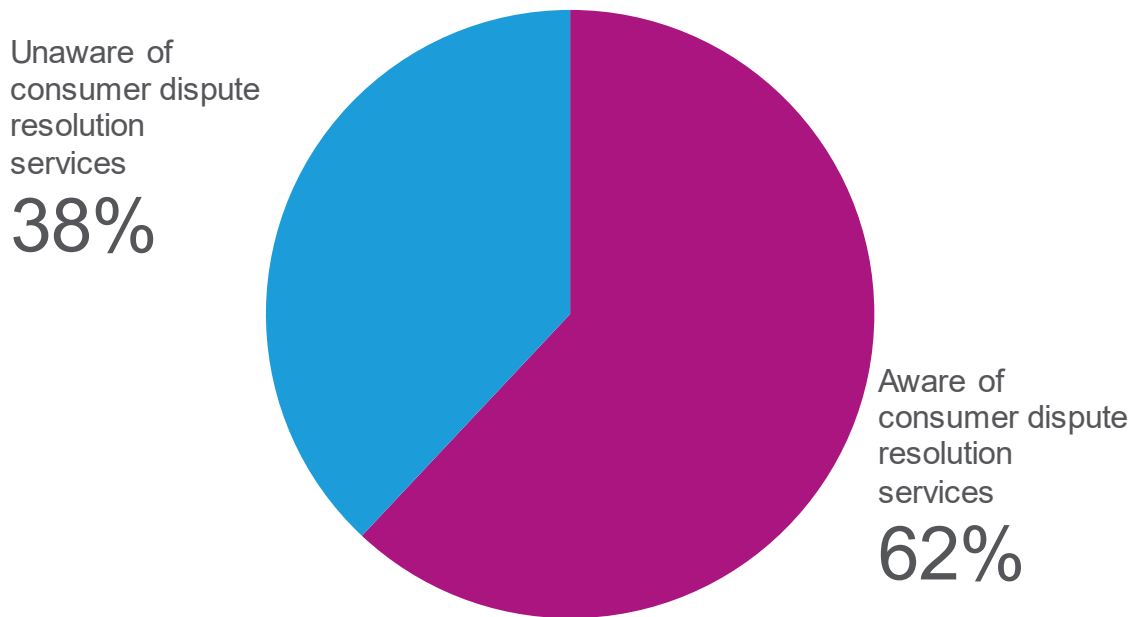
Q115. Which of the following do you think offers the best protection in terms of your consumer rights?

Base: All wave respondents – July 2018 to June 2019. (Asked annually.) See technical appendix for base sizes.

Consumer dispute resolution services

In June 2019, over six in ten (62%) were aware of consumer dispute resolution services. This figure has remained stable since July 2018 (61%). Those in social grades AB (75%, compared with 50% of those in social grades DE) and those with household incomes of £50,000 or more (76%, compared with 59% of those with household incomes under £16,000) were more likely to claim awareness.

Figure 23: Whether aware of consumer dispute resolution services, June 2019



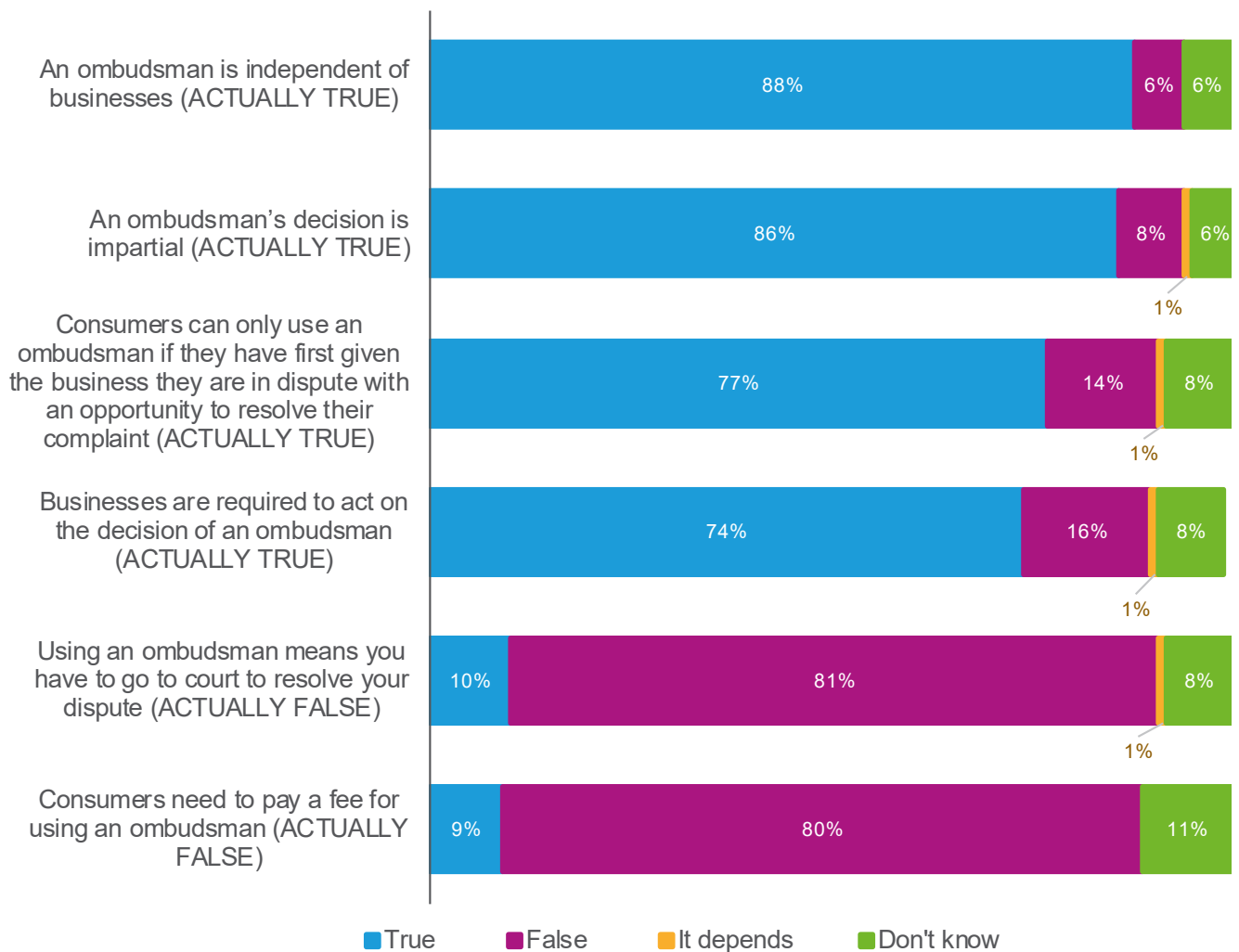
Q116. I would now like to ask you about consumer dispute resolution services. These are independent organisations which help people resolve a consumer dispute, such as an ombudsman. Before today, had you heard of any of these types of services?

Base: All wave respondents – June 2019 (4,231).

Respondents who had heard of consumer dispute resolution services were presented with six true or false statements on ombudsman services.

The majority were likely to correctly think that an ombudsman is independent of business (88%), that an ombudsman's decision is impartial (86%), that consumers can only use an ombudsman if they have first given the business they are in dispute with an opportunity to resolve their complaint (77%), and that businesses are required to act on the decision of an ombudsman (74%). One in ten incorrectly thought using an ombudsman means you need to go to court to resolve your dispute and that consumers need to pay a fee for using an ombudsman (10% and 9%, respectively). These findings are consistent with those observed in July 2018.

Figure 24: True of false statements on ombudsman services, June 2019⁶



Q117. I'm now going to read out a series of statements about ombudsman services. For each, please tell me whether you think it is true or false.

Base: All wave respondents aware of consumer dispute resolution services (2,546).

The correct answers for each of these statements are as follows:

- An ombudsman is independent of business: True
- An ombudsman's decision is impartial: True
- Consumers can only use an ombudsman if they have first given the business they are in dispute with an opportunity to resolve their complaint: True
- Businesses are required to act on the decision of an ombudsman: True
- Using an ombudsman means you have to go to court to resolve your dispute: False
- Consumers need to pay a fee for using an ombudsman: False

⁶ The correct answers for each statement are included in brackets.

Four in ten (39%) of those that had heard of consumer dispute resolution services provided the correct answer to all six statements. Those most likely to answer all six statements correctly included those aged 45 to 54 (46%, compared with 41% or less for other age groups); and those with household incomes of £35,000 or more (44%, compared with 34% of those with household incomes under £16,000).

Consumer problems

In June 2019, the public were asked about their experience of consumer problems. Two in ten (20%) had experienced a problem with a provider in the last 12 months, a decrease from 23% in July 2018. However, 5% or less experienced a problem with a specific type of provider. Problems were most commonly experienced with retail or shopping providers (5%), energy providers (5%) and broadband providers (4%). Three quarters of people (78%) had not experienced any problems with providers in the last 12 months.

Those who had switched provider for a product or service in the last 12 months were more likely to have experienced a problem with their provider for this product or service in the same period. This was particularly apparent for energy; 16% of those who had switched their energy provider or tariff had experienced a problem with their energy provider in the last 12 months, compared with 3% of those who had not switched. Since it is not clear whether problems were experienced with a current or previous provider, we cannot tell whether problems with providers prompted people to switch, or whether problems were more likely after switching to new suppliers.

Those in higher social grades were more likely to have experienced a problem with their provider for a product or service in the last 12 months. Nearly a quarter of those in social grades ABC1 (24%) were likely to have experienced a problem (compared with 17% of those in social grades C2DE). Those with household incomes of £50,000 (35%, compared with 27% of those with household incomes under £16,000), were also more likely to have experienced a problem. Those living in the South West (28%) and Scotland (28%) were more likely to have experienced a problem, whereas those living in the West Midlands and Northern Ireland were least likely to have experienced a problem (11% and 10%, respectively).

People who experienced a problem with a provider were asked a series of follow-up questions on their experience. Due to the low incidence of problems with some providers, it is not possible to report robustly on these questions for each type of provider. We therefore limit this analysis to providers where at least 50 respondents experienced a problem: energy providers (215 respondents), retail/shopping (210), broadband providers (147) and mobile phone providers (74).

Most people contacted their provider in response to their problem. They were most likely to contact their broadband provider (91%) and least likely to contact a retail /shopping provider (77%).

It was less common for people to contact someone other than their provider. This was most common for energy providers (8%) and least common for retail/shopping providers (3%)

Figure 25: Whether contacted provider or someone else in response to problem, June 2019



Q121. Thinking about your most recent problem with the [PROVIDER], did you contact anyone about this problem?

Base: All wave respondents who had a problem with their broadband provider (147); their energy provider (215); their mobile phone provider (74); retail/shop/online shopping provider (210).

People who had experienced problems were asked whether they had resolved their problem directly with the provider. Around seven in ten customers managed to resolve their problem directly, ranging from 68% to 73%.

Figure 26: Whether problem was resolved directly with the provider, June 2019



Q122. And did you resolve the problem directly with the provider?

Base: All wave respondents who had a problem with their broadband provider (147); their energy provider (215); their mobile phone provider (74); retail/shop/online shopping provider (210).

Further questions were included to ask people what other action they took in response to their problem and, where applicable, why they did not contact an ombudsman or other dispute

resolution service. However, due to small base sizes, it is not possible to report robustly on responses to these questions.

Trust in consumer organisations

The public were asked how much they trusted each of the following:

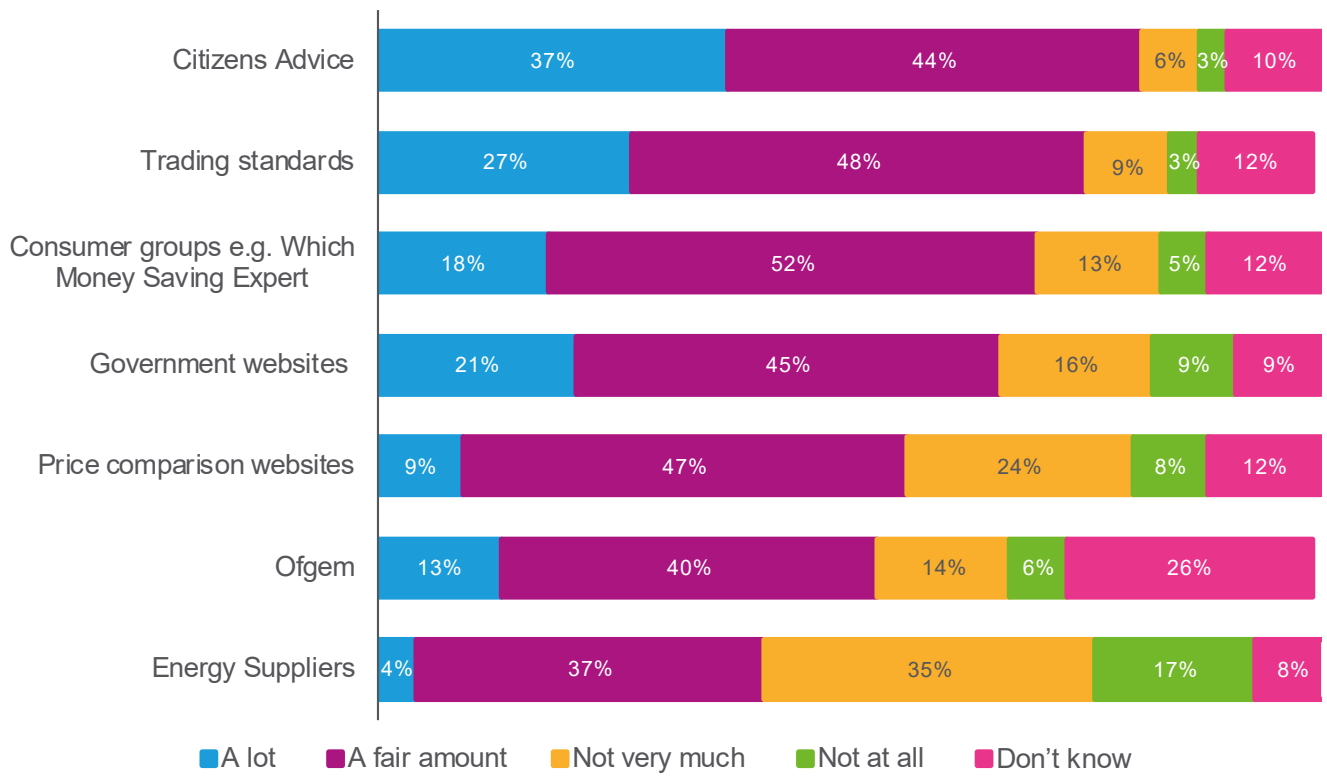
- Ofgem
- Energy suppliers
- Price comparison websites
- Consumer groups, including Which? and Money Saving Expert
- Citizens Advice
- Trading standards
- Government websites

Levels of trust (either a lot or a fair amount) were highest for Citizens Advice (81%) and Trading Standards (76%), followed by consumer groups (70%), government websites (67%), price comparison websites (56%) and Ofgem (53%). These findings are consistent with those observed in July 2018.

A quarter of people (26%) said they did not know how much they trusted Ofgem, probably indicating a lower level of awareness compared with the other organisations and services included at this question.

Levels of trust were lowest for energy suppliers. Four in ten (41%) people trusted energy suppliers a lot or a fair amount but over half (52%) said they did not trust them very much or did not trust them at all.

Figure 27: Trust in consumer or organisations, June 2019



Q130. How much, if at all, do you trust the following to give you impartial information?

Base: All wave respondents – June 2019 (4,231).

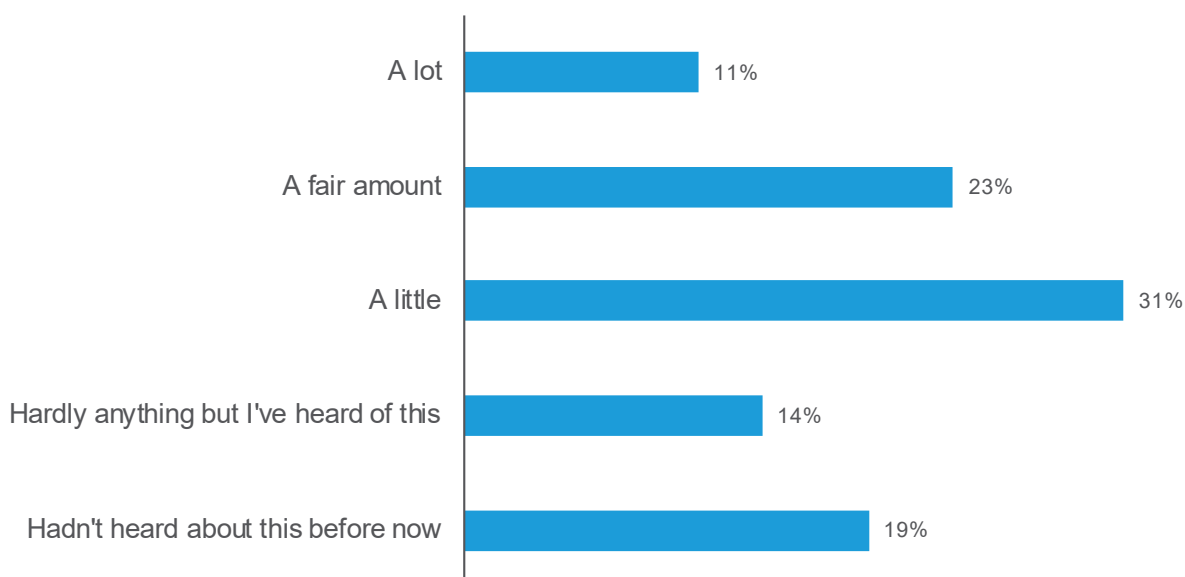
Artificial intelligence

New questions were added to the survey in June 2019 to assess current public knowledge, interest and attitudes towards artificial intelligence (AI). This was defined in the survey as “technologies with the ability to perform tasks that would otherwise require human intelligence, such as speech recognition and language translation”.

Awareness of artificial intelligence

All people interviewed in June 2019 were asked how much, if anything, they had heard or read about AI. Eight in ten people (80%) said they had heard of AI, with 19% having never previously heard of this. One in ten (11%) said they had heard or read a lot about AI, 23% a fair amount and 31% a little. A further 14% said they had heard of AI but knew nothing more than this.

Figure 28: How much heard or read about artificial intelligence, June 2019



Q210. Before today, how much, if anything, have you heard or read about artificial intelligence, otherwise known as 'AI'?

Base: All wave respondents – June 2019 (4,231).

Men were more likely than women to say they had heard or read about AI. More than eight in ten men (85%) had heard of AI compared with over seven in ten women (74%). Men were also more likely to claim to have heard or read greater amounts about AI: 45% of men said they had heard or read a lot or a fair amount about AI, compared with 24% of women.

People aged 65 and over were least likely to be familiar with AI. Just 66% of those aged 65+ said they had heard of AI, compared with between 81% and 85% in all younger age groups.

There were further differences based on social grade and income. Nine in ten (91%) of those in social grades AB had heard of AI and almost half (48%) said they knew a lot or a fair amount

about it. The equivalent figures were lower for those in social grades DE, with 64% of this group aware of AI and 20% claiming to know a lot or a fair amount about it. Awareness of AI increased with income: 93% of those with household incomes of £50,000 or more had heard of AI, compared with 69% of those with household incomes below £16,000.

Levels of awareness of AI also differed regionally. People living in London (43%) were most likely to say they knew a lot or a fair amount about AI. This was more than twice the level compared with Wales and Northern Ireland (20%), where people were least likely to claim this level of awareness.

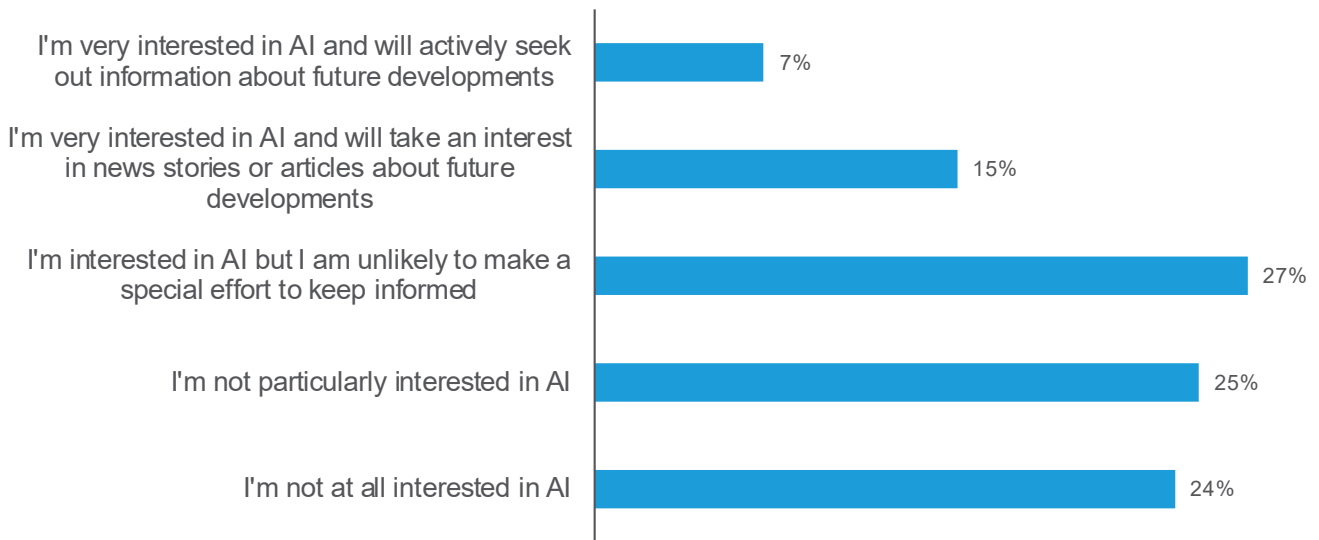
Interest in artificial intelligence

All people interviewed in June 2019 were asked their level of interest in AI (regardless of their level of awareness) from the following options:

- I'm very interested in AI and will actively seek out information about future developments
- I'm very interested in AI and will take an interest in news stories or articles about future developments
- I'm interested in AI, but I am unlikely to make a special effort to keep informed
- I'm not particularly interested in AI
- I'm not at all interested in AI

Overall, half of people (49%) said they were interested in AI. Over two in ten (22%) said they were very interested in AI, with 7% saying they will actively seek out information about future developments and 15% that they will take an interest in news stories or articles about future developments. A further 27% said they were interested in AI but unlikely to make a special effort to keep informed. A quarter said they were not particularly interested in AI (25%) with a similar number saying they were not at all interested in this (24%).

Figure 29: Level of interest in artificial intelligence, June 2019



Q211. Which of these statements best describes your level of interest in artificial intelligence?

Base: All wave respondents – June 2019 (4,231).

As might be expected, there was a relationship between interest in AI and how much people had previously heard or read about it. Eight in ten (80%) of those who said they had heard or read a lot or a fair amount about AI said they were interested in it.⁷ This compares with 51% of those who had heard or read a little about AI, 26% of those who had only heard or read hardly anything about it, and 10% of those who had never previously heard about AI.

Differences in levels of interest in AI between demographic sub-groups broadly reflected differences in awareness levels reported earlier. Those most likely to be interested included: Men (58% versus 40% of women); those aged 16 to 24 (63%, compared with 55% or lower in other age groups – and 32% of those aged 65 or over); those in social grades AB and C1 (64% and 54%, respectively, compared with 44% of those in social grades C2 and 33% of DEs); those with higher household incomes (68% of those with incomes of £50,000 or more and 66% of those with incomes between £35,000 and £49,999, compared with between 39% and 51% in lower income groups); and those living in London and the South East (60% and 55%, respectively, compared with between 37% and 51% in other regions).

Perceptions of artificial intelligence

All people interviewed in June 2019 were asked how positive or negative they felt about the impact of increasing use of artificial intelligence in the UK.

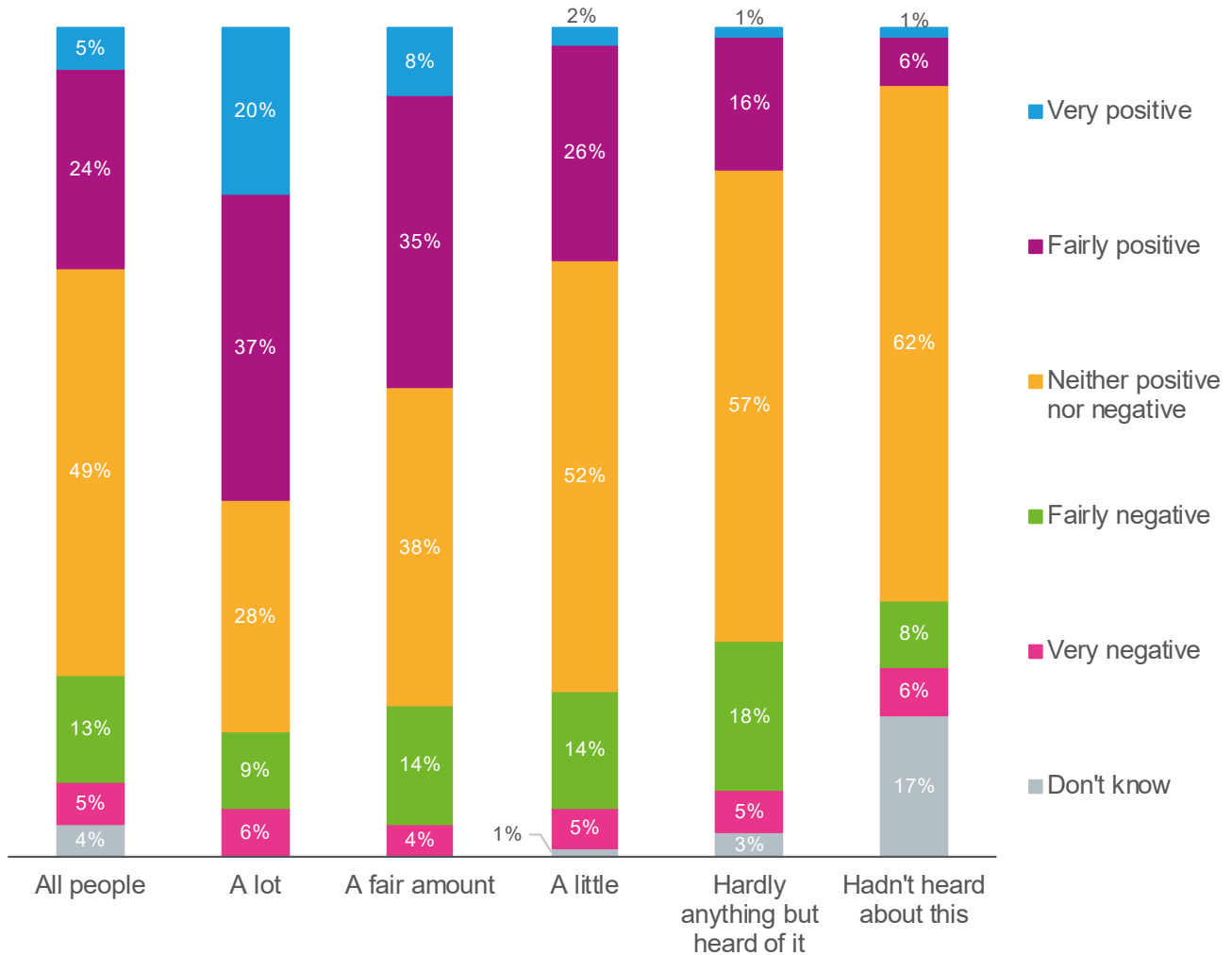
Three in ten people (29%) said they were positive about AI while 18% said they were negative. A greater number of people said they were neither positive nor negative (49%), with a further 4% saying they did not know.

As illustrated in Figure 30, responses to this question differed based on how much people had previously heard or read about AI. Those who had heard or read a greater amount were more positive about AI; among those who said they had heard or read a lot about AI, 20% said they were very positive about it and 37% that they were fairly positive. Those with lower levels of

⁷ This measure of interest combines the first three categories in Figure 29.

awareness of AI were far more likely to either say they felt neither positive or negative about it or that they did not know.

Figure 30: How positive or negative people feel about impact of increasing use of artificial intelligence in the UK – based on all respondents and by awareness of AI, June 2019



Q212. Overall, how positive or negative do you feel about the impact of increasing use of artificial intelligence in the UK? Q210. Before today, how much, if anything, have you heard or read about artificial intelligence, otherwise known as 'AI'?

Base for 'All people' bar: All wave respondents – June 2019 (4,231).

Bases for other bars: A lot (394); A fair amount (862); A little (1,272); Hardly anything but heard of it (657); Hadn't heard about this (1,006).

As was the case for interest in AI, differences in perceptions of the impact of AI between demographic sub-groups again closely related to differences in awareness levels. Those more likely to view the impact of AI as positive included: Men (38% versus 21% of women); those aged 16 to 24 (40%, compared with 34% or lower in other age groups – and 22% of those aged 65 or over); those in social grades AB (37%, compared with between 23% and 31% of those in lower social grades); and those with higher household incomes (43% of those with incomes of £50,000 or more and 37% of those with incomes between £35,000 and £49,999, compared with between 24% and 32% in lower income groups).

Applications of artificial intelligence

All people interviewed in June 2019 were asked further questions about five applications of AI:

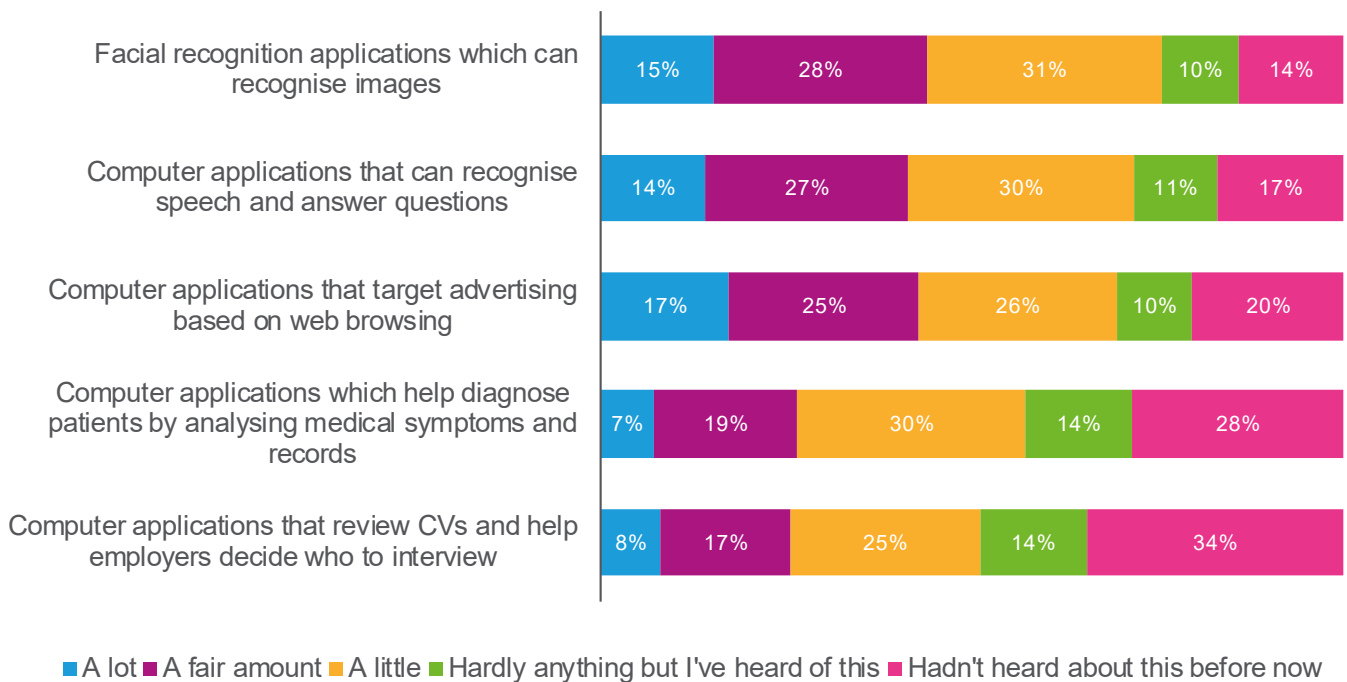
- Computer applications that can recognise speech and answer questions
- Facial recognition applications which can recognise images
- Computer applications that target advertising based on web browsing
- Computer applications which help diagnose patients by analysing medical symptoms and records
- Computer applications that review CVs and help employers decide who to interview.

For each application, people were first asked how much they had heard or read about it and then asked the extent to which they supported or opposed each application.

The applications with the highest levels of awareness were: facial recognition applications which can recognise images; computer applications that can recognise speech and answer questions; and computer applications that target advertising based on web browsing. For each of these applications, around eight in ten people said they were aware of them (84%, 81% and 77%, respectively) and around four in ten said they had heard or read a lot or a fair amount about them (43%, 41% and 42%, respectively).

Levels of awareness were lower for the other two applications. Seven in ten (70%) were aware of computer applications which help diagnose patients by analysing medical symptoms and records, and 64% were aware of computer applications that review CVs and help employers decide who to interview. Around a quarter of people said they had heard or read a lot or a fair amount about each application (26% and 25%, respectively).

Figure 31: How much heard or read about different applications of AI, June 2019



Q213. Before today, how much, if anything, have you heard or read about the following applications of artificial intelligence?

Base: All wave respondents – June 2019 (4,231).

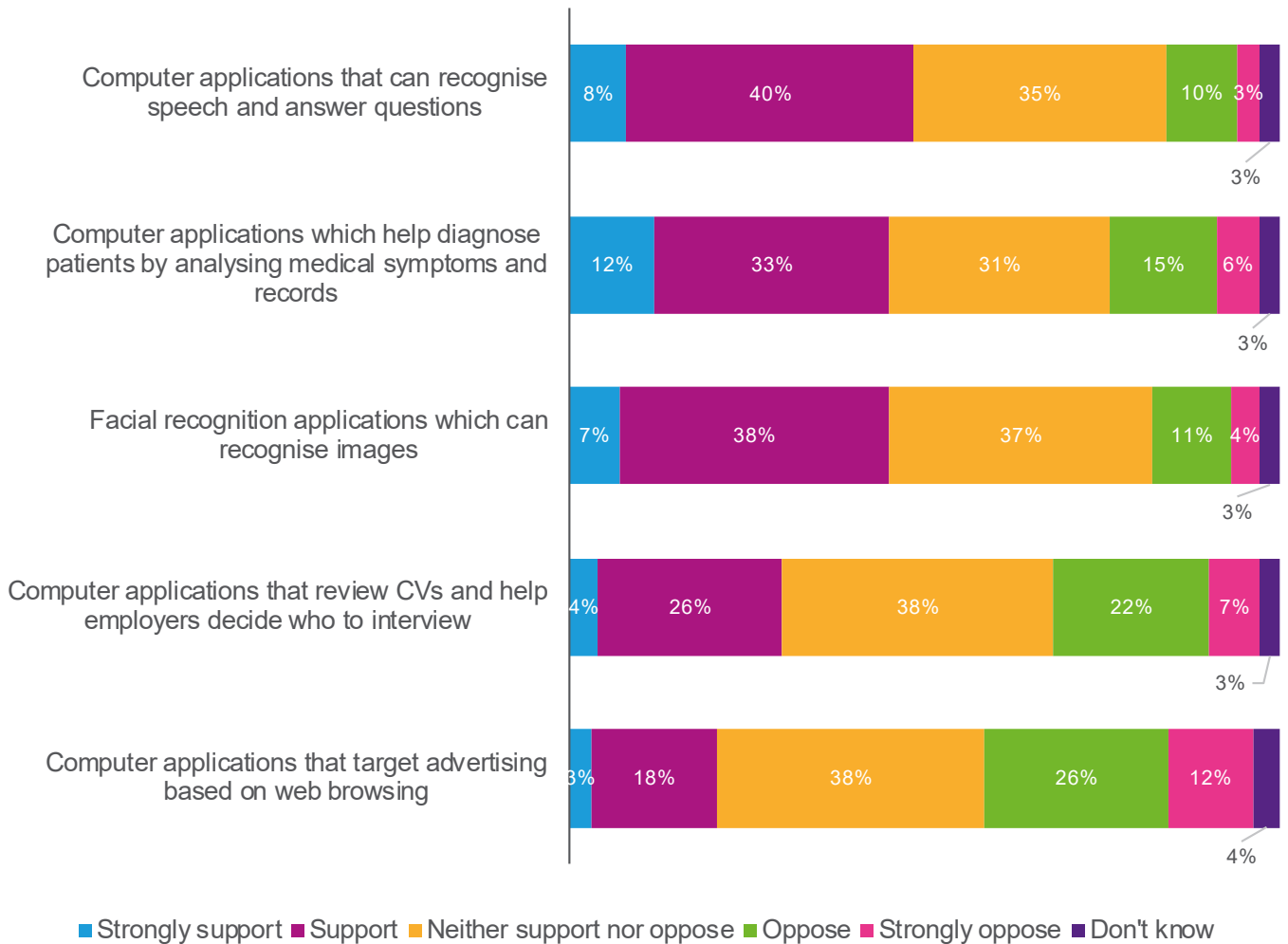
For three of the applications, people were more likely to support than oppose them: computer applications that can recognise speech and answer questions; facial recognition applications which can recognise images; and computer applications which help diagnose patients by analysing medical symptoms and records. For each of these, almost half supported (48%, 45% and 45%, respectively, compared with 13%, 15% and 21% that opposed them, respectively).

By contrast, people were more likely to oppose than support the use of computer applications that target advertising based on web browsing. This application was opposed by almost four in ten people (38%), with 20% supporting it.

Opinion was evenly divided for the remaining application: computer applications that review CVs and help employers decide who to interview. Three in ten people (29%) supported this while the same proportion (29%) opposed it.

For all five applications of AI, between 31% and 38% said they neither supported nor opposed its use. This response was more common among those who were previously unaware of AI or who had not heard or read much about this.

Figure 32: Whether support or oppose different applications of artificial intelligence, June 2019



Q214. And to what extent do you support or oppose each of the following applications of artificial intelligence?

Base: All wave respondents – June 2019 (4,231).

Technical appendix

Technical notes

The wave 30 report provides selected headline findings and highlights statistically significant differences at the 95% level between wave 30 and previous waves.

Percentages included on charts in this report may not add up to 100% due to rounding, the exclusion of some categories (e.g. 'Don't know' and 'Refused') and the option for more than one response to be selected at some questions.

This report is not an exhaustive overview of the findings. Please refer to the accompanying Excel summary tables, Excel dataset and PDF/Excel cross tabulation tables to see full responses to all survey questions.

The results shown here are based on 4,231 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 5 June and 16 June 2019 on the Kantar UK Omnibus, which uses a random location quota sampling method.

Most of the questions included at wave 30 had been asked in previous waves. New questions were added on artificial intelligence. These questions were jointly developed between BEIS and Kantar and refined through cognitive testing.

The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region and tenure. Results included here are based on weighted data.

More detailed information can be found in the technical note. This is available at: <https://www.gov.uk/government/publications/beis-public-attitudes-tracker-technical-note>

Fieldwork dates and sample sizes

Wave	Fieldwork dates	Sample sizes
Wave 1 (Mar 2012)	21 to 25 March 2012	2,121
Wave 2 (Jun 2012)	27 June to 1 July 2012	2,100
Wave 3 (Sep 2012)	26 to 30 September 2012	2,118
Wave 4 (Dec 2012)	12 December 2012 to 2 January 2013	2,107
Wave 5 (Mar 2013)	27 to 31 March 2013	2,051

Wave 6 (Jul 2013)	3 to 7 July 2013	2,124
Wave 7 (Sep 2013)	25 to 29 September 2013	2,103
Wave 8 (Dec 2013)	11 to 15 December 2013	2,110
Wave 9 (Mar 2014)	26 to 30 March 2014	2,040
Wave 10 (Jun 2014)	25 to 29 June 2014	2,087
Wave 11 (Sep 2014)	24 to 28 September 2014	2,103
Wave 12 (Dec 2014)	10 December 2014 to 8 January 2015	2,119
Wave 13 (Mar 2015)	18 to 29 March 2015	1,981
Wave 14 (Jun 2015)	24 to 28 June 2015	2,118
Wave 15 (Sep 2015)	23 to 27 September 2015	2,121
Wave 16 (Dec 2015)	9 to 13 December 2015	2,121
Wave 17 (Mar 2016)	23 to 27 March 2016	2,105
Wave 18 (Jun 2016)	29 June to 3 July 2016	2,114
Wave 19 (Sep 2016)	28 September to 2 October 2016	2,080
Wave 20 (Dec 2016)	14 to 18 December 2016	2,138
Wave 21 (Mar 2017)	29 March to 2 April 2017	2,180
Wave 22 (Jun 2017)	30 June to 4 July 2017	2,097
Wave 23 (Sep 2017)	27 September to 1 October 2017	2,105
Wave 24 (Dec 2017)	13 to 17 December 2017	2,078
Wave 25 (Mar 2018)	28 March to 6 April 2018	2,102

Wave 26 (Jul 2018)	11 to 17 July 2018	4,268 ⁸
Wave 27 (Sep 2018)	19 to 30 September 2018	4,258
Wave 28 (Dec 2018)	5 to 16 December 2018	4,273
Wave 29 (Mar 2019)	13 to 24 March 2019	4,224
Wave 30 (Jun 2019)	5 to 16 June 2019	4,231

⁸ The sample size increased to c. 4,200 from Wave 26 (July 2018) onwards to allow greater scope for regional analysis.

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