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Office for Product
Safety & Standards

Consumer attitudes to product safety

Research report

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Headline findings

The Office for Product Safety and Standards (OPSS) commissioned Kantar's Public division to explore consumers' attitudes and behaviours in relation to product safety, their awareness of the product safety system and their assumptions regarding the role of different actors within it. To achieve this Kantar conducted two-phases of qualitative research, as well as a nationally representative survey of UK consumers (n=4,265). Further information on the methodology can be found on page 13 as well as appendices A and B. This report combines the findings from all three phases of research. Where percentages are presented they refer to quantitative survey results.

Both the qualitative research, and the quantitative survey found that consumers implicitly trust the product safety system, **believing the regulations in place ensure products in the UK are safe to use**. Qualitative interviews revealed that products that inherently pose the greatest risk, for instance electrical items that involve heating elements or ovens, are assumed to be most heavily regulated and therefore the least likely to present safety issues or defects.

Consequently, consumers **rarely consider product safety** when making purchase decisions: the survey found that cost and quality are overriding factors. Both the survey and the qualitative research revealed there to be some variation by product category. Safety is more likely to be considered during the purchase of baby products, which are considered to present the strongest risk to others.

Both the survey and the qualitative interviews found that when they do occur, **safety issues are largely considered to be a result of misuse**. As a result, responses to recalls and warnings vary. Sixteen percent of survey respondents had personally experienced a safety issue or defect with a product: many of those affected by a safety issue said they had contacted the manufacturer (30%) or retailer (27%) to let them know. However, of those that had seen or heard a product recall notice, or other safety warning from a retailer of manufacturer for something they owned, 19% said they did not react to the recall. This is in line with existing evidence about low consumer response rates to product recalls.

The survey findings are also in line with the fact that **few consumers habitually register their products:** 28% of those who have ever registered a product said this was something they 'always' do, limiting the extent to which product owners can be contacted directly with safety and or recall information. The survey found that 73% of consumers keep and store their receipts, and 59% say they read the instructions before using a product for the first time, but only 45% would register a product.

Product registration is not linked to safety. The survey found that even when consumers do register a purchase, the motivation for doing so is primarily to get or extend a warranty, 83% said this was why they had registered their product. In contrast just 3% of those that had registered their product had done so for the sole purpose of ensuring the manufacturer could contact them with safety information.

Awareness is a key barrier to registration. The survey found that generally, consumers had not registered their products because they did not want to or did not believe it was necessary (46%) or because they did not know they could (17%). Others are unclear about how to register their items (4%).

Registration is more common for products in certain categories. The survey found that **white goods are most likely to be registered**, and qualitative interviews revealed that this is linked to both the value of the items in this category, their relative importance to consumers' daily lives (increasing the attractiveness of a warranty) and the fact that registration is often explicitly prompted at the point of sale or installation. Among the recent purchasers of white goods included in the survey, 53% had registered their purchase compared with 30% of those that had purchased electrical appliances, 11% of those that had purchased baby products and 2% of those that had purchased toys.

This quantitative and qualitative research suggests that consumers require a product registration system that is **easy to use and where the purpose and benefit for the individual is clear**.

When prompted to think about how the product safety system functions, consumers interviewed were clear that they **expect government to show strong leadership in setting and upholding legal safety requirements**. The survey showed that responsibility for ensuring products meet safety requirements, and responding to safety issues when they arise, is seen to reside firmly with manufacturers.

Executive summary

Aims and objectives

The Office for Product Safety and Standards (OPSS) commissioned Kantar's Public division to explore consumers' attitudes and behaviours in relation to product safety, their awareness of the product safety system and their assumptions regarding the role of different actors within it. The research was designed to establish where safety sits within consumers' priorities when purchasing a product, as well as the extent to which it is considered after purchase. Five priority product categories were the focus of the research[1]: white goods, electrical appliances, baby products, toys and cosmetics. Consumer habits regarding the registration of their products with the manufacturer, to enable manufacturers to share safety information and warnings when necessary (referred to as product registration throughout this report), were explored within this context to identify the factors that underpin the current low rates of registration in the UK[2].

The research also sought to explore consumers' interactions with the product safety system, including their experiences with, and responses to, product recalls (a request from a manufacturer to return an item after the discovery of an issue or defect that might endanger the consumer) and safety incidents. Consumers' awareness of the product safety system was also investigated, in particular the qualitative research sought to establish how much is understood about how the system works and how the responsibilities are shared within it.

This study sits within OPSS' wider programme of behavioural insights research, which also consists of a literature review and trials of interventions aimed at improving product registration rates and responses to recalls.

Approach

To achieve these aims Kantar conducted two phases of qualitative research consisting of 36 accompanied shops[3] and a series of 12 deliberative workshops, involving 96 consumers. Kantar also conducted a nationally representative survey of 4,256 UK consumers. The results of the survey were used both to validate the findings that emerged from the qualitative research and to undertake a segmentation analysis. All phases of fieldwork were conducted, consecutively, between November 2018 and April 2019.

This report combines the findings from all three phases of research and the qualitative and quantitative findings are presented side by side. For further information on methodology and interpreting the results of this research see page 13 and appendix A.

[1] Selected because they are the direct responsibility of OPSS.
[2] In 2017 a survey undertaken for the Association of Manufacturers of Domestic Appliances (AMDA) found that found that less than half of adults (43%) usually register large domestic appliances.
[3] Accompanied shops are a qualitative method which involves researchers accompanying consumers to the retailer in which they previously bought a product. Discussing a topic in context provides real-world stimulus for discussion and can prompt the consumer to recall details of the purchase which they would otherwise be unable to. Further information on the methodology and the research materials used are provided in Appendix A.

Key findings

Role of safety in product purchasing and usage behaviour

Across all phases of the research it was clear that product safety was rarely a top of mind concern for consumers when purchasing a product. Purchase decisions were largely driven by cost and quality. As discussed further below, consumers trusted that the system will protect them by ensuring the products available for them to buy are safe.

The extent to which safety was considered varied between product categories. Survey respondents were asked the extent to which they had taken a range of factors into account when making a specific, recent purchase. The survey found that safety was of greatest concern for those that had purchased baby products (46%). This is in line with the qualitative research, which found that greater consideration of safety in the purchase of baby products, compared with items in other categories, stems from the fact that these items are used directly by children, who were not capable of making safety judgements or assessing risks themselves. Safety was least likely to have been considered in the purchase of cosmetics (10%).

The research also examined post-purchase behaviour. Most consumers in the survey reported doing things like storing their receipts and warranty in a safe place (73%), keeping the instructions (68%) and following the guidance for safe use (67%). However, 21% said they were unlikely to read instructions carefully and 15% were unlikely to follow guidance for safe use. Forty-five percent of those surveyed said they were likely to register a new product with the manufacturer when the option was available. Correspondingly, 49% of those surveyed had never registered a product. Rates of registration varied by product type: white goods were the most likely product to be registered 53%, followed by electrical appliances (30%), baby products (11%) and toys (2%).

Considerations of safety rarely underpinned consumers' post-purchase behaviours. The qualitative interviews found that faults and issues with products were viewed as inconveniences that would be costly and time consuming to resolve. The motivation for keeping receipts and warranty information, and for registering products, was minimising this inconvenience and ensuring a swift replacement. The risk to safety posed by a fault was seldom front of mind. Among the survey respondents that had registered their recent purchase (23% overall), 83% had done so to validate or extend their warranty. Few were aware of any safety benefits, 16% said they had registered the product so the manufacturer could let them know if there were any problems with the product.

Interaction with the product safety system

The fact that consumers rarely consider the safety of their products reflects an inherent trust in the product safety system to protect them. Across all phases of the research, consumers were consistently found to trust and believe that an effective system is in place in the UK.

This trust in the system was based on a number of assumptions. Qualitative interviews found there was a common assumption amongst consumers that manufacturers would not risk reputational damage by making unsafe products, that retailers would thoroughly check the manufacturers they purchased from, and that regulations are in place to stop potentially dangerous products from entering the market. This was supported by the quantitative survey findings; 74% agreed with the statement ‘UK products are generally safe as there are regulations in place to ensure this’. Qualitative interviews also found that consumers assumed that retailers would thoroughly check the manufacturers they purchased from.

In addition, consumers used the fact that they had rarely experienced safety issues to confirm their assumptions. The qualitative research found that the perception that safety incidents were an infrequent occurrence was persistent. Those that had experienced issues with products they owned, for instance safety warnings or product recalls, viewed them as ‘one-off’ isolated incidents. During the qualitative interviews, consumers also pointed out that following ‘sensible behaviours’ would ensure safety, even if they did not necessarily engage with safety guidance themselves.

Thirty-two percent of those surveyed said they had seen a product recall notice, or other safety warning, from the retailer or manufacturer, for a product they owned. However, the survey also found that this had not always prompted action. While 41% of survey respondents who had experienced a recall for something they owned said they had allowed the manufacturer to make modifications and 28% had returned the item in response to a recall or safety warning, 19% said they had taken no action[4].

During the deliberative workshops, consumers provided a number of reasons for not responding to a recall, including the time and inconvenience of organising a return or modification, and the belief that the user could avoid any safety risks by taking additional care when using the item. Direct experience of a safety issue or defect was more likely to have prompted action than a recall or safety warning: 50% of those that had directly experienced a defect had contacted the manufacturer or retailer and 34% had returned their faulty product[5].

Role of actors in the product safety system

Both the qualitative and quantitative elements of the research showed that consumers believed that manufacturers have the greatest responsibility for setting product safety standards, ensuring they were met and resolving any product safety issues, with the government playing a secondary role.

Participants in the deliberative workshops, who were given a more detailed explanation about how the system currently works in practice, raised a number of concerns. First and foremost, consumers were concerned about the extent to which the system appeared to be reliant on consumer awareness of, and engagement with, safety - particularly around registering appliances and responding to recalls. This was not consistent with their assumption that the system would protect them without their input. Consumers expressed further concern about the distribution of responsibilities across different actors, including different levels of government. Consequently, consumers sought reassurance that central government are providing an overall leadership role in setting and upholding safety standards.

[4] Multiple responses were permitted. In addition to the responses outlined in the text, 8% said they had followed the manufacturers guidance for safe use, 5% said they had thrown the item away or stopped using it (but did not return it), 3% said ‘other’ and 1% said they had tried to fix the product themselves.
[5] Multiple responses were permitted. In addition to the responses outlined in the text, 17% had stopped using the product, 11% had discarded the product, 5% had made adjustments to product of the way they were using it to make it safer, 3% had contacted a consumer rights organisation, 3% had taken an ‘other’ action, 6% had taken no action.

Segmenting consumers by attitude to product safety

As part of the research, a segmentation was developed to better understand how attitudes and stated behaviours in relation to product safety, varied across adults in the UK. Responses to 19 'golden questions' were used to allocate respondents to segments and discriminant analysis was undertaken to identify the importance of different questions in explaining the segments. The segmentation analysis is explored in Chapter 4. Further details on the methodology, along with the 'golden questions' are listed in appendix B.

This analysis identified seven discrete groups who vary in their attitudes and stated behaviours in relation to product safety, the percentages indicate the size of each segment:

- Less connected (14% of the population)
- Quick to replace (15% of the population)
- Second hand shoppers (10% of the population)
- Buy to last (11% of the population)
- Busy families (12% of the population)
- Latest quality (17% of the population)
- Aware and organised (21% of the population)

Echoing the findings above, most segments generally trusted that products in the UK are safe to use but differed in their purchasing priorities and attitudes and behaviours related to product safety. The segment names reflect the key characteristics of each group and were developed together with OPSS.

The *less connected* segment was least likely to register products (1% likely), largely as a consequence of a lack of awareness of the possibility or purpose of registering. Ninety percent believed it was their responsibility to ensure the products in their home are safe to use. Ninety-three percent will follow the instructions and guidance for safe use once they have bought something new. Eighty-six percent trusted that UK products are generally safe to use and there is regulation in place to ensure this.

This segment was older, female, and more likely to be living alone. The majority were home owners (66%) and 33% are retired. This segment contained the largest proportion of socio-economic group DE (37%) and internet usage for this group was particularly low.

The *quick to replace* segment was also unlikely to register their products (16% likely). They were less likely than other segments to believe it is their responsibility to ensure products in their home are safe to use (56% agree) and, as a result, were less likely to say they will follow the instructions and guidance for safe use once they have bought something new (21%) than others. This segment was among the least trusting of the product safety system, with 49% agreeing that UK products are generally safe to use as there are regulations in place to ensure this.

This segment was the youngest of the seven identified and comprised mainly of young people working full time as well as students. This segment was the most likely to be living in privately rented accommodation. They were found to prioritise having up-to-date products in their household (44% said this is important to them) and were willing to pay more for something if it means they can have it straight away.

Second hand shoppers were also relatively unlikely to register their products (35% likely). The majority of this segment believed it was their responsibility to ensure products in their home are safe to use (82%) and 69% said they are likely to follow the instructions and guidance for safe use once they have bought something new. *Second hand shoppers* were also relatively less trusting of the product safety system: 53% trusted that UK products are generally safe to use as there are regulations in place to ensure this.

This segment was older (40% over 55) and more likely than most others to fall into the DE socio-economic group (36%). Twenty-four percent were retired and a further 12% were unemployed and not seeking work. This group were the most likely of all of the segments to say that cost is the most important factor for them when making a purchase (61%) and 46% said they often buy second hand as it offers better value for money.

Among the *buy to last* segment, 38% said they were likely to register a product. Again, most of this group (84%) believed it was their responsibility to ensure products in their home are safe to use, however only 21% said they were likely to follow the instructions or guidance for safe use once they had bought something new (although were likely to store receipts and warranty information). The majority (71%) believed that UK products are generally safe to use as there are regulations in place to ensure this.

Those in the *buy to last* segment tended to prioritise quality when purchasing new items, 82% said they would be willing to pay more for quality, and 62% said they bought from well-known retailers because they know if there is a problem they will deal with it. In contrast to *quick to replace*, this group would prefer to keep an item until they absolutely must replace it. This segment tended to be in employment (71%) and 69% were home owners.

A similar proportion of the *busy families* segment said they were likely to register a product (40%). This segment was by far the least likely to believe it was their responsibility to ensure the products in their household were safe (18%), although 64% said they would be likely to follow the safety instructions for safe use once they had bought something knew. Again, the majority (77%) believed that UK products are generally safe to use as there are regulations in place to ensure this.

This segment was younger, with 37% aged between 16 and 35. They were also most likely to live in households containing children (36%). Sixty-six percent were in employment. After *second hand shoppers* this group were most likely to say they often buy second hand (25%).

Two of the segments identified were very likely to register their products: *latest quality* (75% likely) and *aware and organised* (86% likely). Both segments were more knowledgeable and more engaged with their purchases than the other five segments. These two were by far the most likely to say that before they buy a product they will do a lot of research (52% and 50% respectively).

These were also the most likely of the 7 segments to view it as their responsibility to ensure the products in their home are safe to use: 92% of *aware and organised* and 91% of *latest quality* agreed this was the case. Correspondingly 92% of *aware and organised* and 89% of *latest quality* said they would follow the instructions and guidance for safe use once they had bought something new. Both also reported high levels of trust in UK safety regulations: 86% of *aware and organised* and 88% of *latest quality* agreed products in the UK are generally safe to use.

The key differences between these two segments were demographic. *Latest quality* (representing 17% of the population) tended to be employed full time (50%), working age (55% aged 25-55), and home owners (68%). *Aware and organised*, was the largest segment, representing 21% of UK consumers. They were typically older (48% aged 55+) homeowners. Thirty percent of this segment was retired.

Introduction and background

Background

The Department for Business Energy and Industrial Strategy (BEIS) has policy responsibility for consumer product safety. The Office for Product Safety & Standards (OPSS) was established by BEIS in January 2018 to enhance protections for individuals, families and communities while driving forward increased productivity, growth and business confidence. Following the establishment of OPSS, it set out an ambitious strategy to strengthen national capacity for product safety. OPSS has a broad remit, covering all general (non-food) consumer product safety (excluding vehicles, medicines and workplace equipment).

The establishment of OPSS is part of the Government response to recent high-profile, product safety related incidents and the evolving challenges of product safety in a global market. As the BEIS Select Committee noted, in the last decade numerous fires, caused by faulty domestic appliances, have had devastating consequences. In 2016/17, 16% of all accidental fires were a result of faulty appliances [6]. At the same time the channels to buy, and sources of, products continue to widen. Consumers can now purchase products online or offline, second hand or directly from a retailer, from established brands and from producers making products in their living room. In addition, they can purchase goods from anywhere around the globe. OPSS must ensure UK safety regulation keeps pace with this evolution without becoming a barrier to innovation and growth.

The Government has already been working to address existing evidence gaps in understanding of the workings of the product safety system and its impact on consumers. The Lynn Faulds Wood Product Recall Review (2016) and Working Group on Product Recalls and Safety (2017) have both gathered insight into the views of key stakeholders from manufacturing, retail and consumer bodies[7]. However, the OPSS identified a need for more detailed insight into consumers' general attitudes and behaviours in relation to product safety. That which does exist indicates low public awareness of the product safety system resulting in limited action[8].

Aims and objectives

In commissioning this work, OPSS sought to fill the existing evidence gap on consumer attitudes towards product safety, as well as to better understand their behaviour in order to inform the design of future government interventions and to strengthen the national capacity for product safety. This research sits within a wider programme of behavioural insights research, consisting of a trial of interventions aimed at improving product registration rates, a historical review of recalls and an examination of industry attitudes towards product safety.

The central aims of this research were to:

- Benchmark public perceptions of product safety and awareness of risks

[6] https://www.gov.uk/government/statistical-data-sets/fire-statistics-data-tables#cause-of-fire
[7] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/630364/wgprs-report.pdf
[8] You Gov survey for Association of Manufacturers of Domestic Appliances, 2017 cited in OPSS 2018-2020 strategy for strengthening national capacity for product safety

- Explore behaviours and decision-making processes in relation to product safety
- Understand consumer interaction with the product safety system and identify potential improvements

To achieve these aims, OPSS commissioned Kantar's Public division to explore consumers' attitudes and behaviours in relation to product safety, their awareness of the product safety system and their assumptions regarding the role of different actors within it.

This research explored attitudes and behaviours in relation to product safety overall, including product registration. Product registration is the system for collating contact details for purchasers of products with the manufacturer, post-purchase, to enable manufacturers to share safety information and warnings directly with product owners where necessary. It also includes product recalls, that is where manufacturers request products are returned due to the discovery of a defect that has safety implications for the consumer. Five priority product categories were the core focus of the research: white goods, electrical appliances, baby products, toys and cosmetics. These were selected because they are the direct responsibility of OPSS.

Methodology

The research undertaken was mixed-method, combining two phases of qualitative research as a well a nationally representative survey of UK consumers.

Qualitative research

First, Kantar conducted qualitative accompanied shops and journey mapping to provide insight into where product safety fits in the purchase journey. Thirty-six accompanied shops were conducted with people who had purchased from one of the following categories in the last month: large domestic appliances, other electrical goods, cosmetics, toys and baby products. The sessions were centred on a store or online visit relating to the actual purchase, where a researcher accompanied a consumer to a store or a website they had recently purchased a product from, and journey mapping was used to trace the purchase journey. For instore visits a researcher accompanied the consumer to the store they had made the purchase in, for online purchases, a researcher visited the consumer at home and observed while they recreated their online purchase process.

These were followed by deliberative workshops exploring consumers' awareness of the product safety system and factors driving perceptions of safety and risk. We conducted 12 workshops with each group involving eight to nine participants responsible for household purchasing decisions.

Quantitative research

In order to quantify the awareness and perceptions identified in the qualitative phases, Kantar conducted a survey of 4,256 UK consumers, designed to be statistically representative of the UK adult population. The questions were included on two consecutive weeks of Kantar's face-to-face Omnibus study with interviews conducted across the UK.

The results of the survey were used to undertake descriptive analysis of stated attitudes and behaviours in relation to risk as well as understanding of the product safety system. In addition, the data was used to produce an attitudinal segmentation of UK consumers, to further understand how people purchase products, and in turn inform how they may respond differently to interventions from different actors within the system. For further detail on methodology, see appendix A.

Reporting Notes

The findings from all phases of the research are outlined in the following report. Insights from the qualitative and quantitative research are provided side by side. The distinction between them is signposted throughout. **Chapter 1** focuses on consumer behaviours in relation to purchasing and using products, and where product safety features. **Chapter 2** covers consumer interactions with the product safety system, for instance experiences with faulty or recalled products. **Chapter 3** explores awareness and knowledge of the product safety system, including public perceptions of the roles and responsibilities of the different actors. **Chapter 4** outlines the findings from the segmentation analysis. Overall conclusions are provided in **chapter 5**.

Where results are reported from 'quantitative research', the 'survey', 'those 'surveyed' or where percentages are reported, this denotes that findings are from the large-scale quantitative research survey.

Where results are reported from 'qualitative research' or, 'interviews/those interviewed', this denotes the findings are from the qualitative strands of this research. Qualitative findings should be assumed to be derived from both the accompanied shops and deliberative workshops. If the findings are from accompanied shops alone or deliberative workshops alone, this source is stated within text (e.g. 'the deliberative workshops revealed.'). Due to small base sizes, percentages are not reported for qualitative research.

The word 'significant' is only used where quantitative research findings are statistically significant. Where charts compare two groups, statistically significant differences between the groups are flagged on charts with an asterix (*). Footnotes below each chart detail the significance testing which was carried out. When reporting quantitative research, any differences discussed in text are statistically significant unless otherwise stated. Significance is reported at the 95% confidence interval.

Due to the nature of qualitative research, no findings from qualitative research will be reported as statistically significant or otherwise.

1. Role of safety in product purchasing and usage behaviour

Chapter summary

Consumers surveyed were asked which factors they had considered when making a recent purchase. Price and quality were the most common considerations, cited by 58% and 56% of survey respondents respectively.

Overall 17% of survey respondents indicated they had considered product safety when making their recent purchase. This was most commonly considered by those that had purchased baby products (46% of these shoppers considered product safety).

Forty-five percent of those surveyed said they were likely to register a new product when the option was available. Again, there was variation by product type: white goods were the most likely product to be registered.

Consumers often equated product registration with activating or extending their warranty, rather than safety. Only 16% of those who had registered their recent purchase did so to enable the manufacturer to get in touch if there was a problem with the product.

This chapter examines consumer behaviours in relation to purchasing and using products, and where product safety features. The focus of both the quantitative and qualitative phases of the research were the five main categories of products, which are the responsibility of OPSS: white goods, baby products, toys, electrical appliances and cosmetics. In both the survey and the accompanied shop, research participants were asked to think about a specific, recent, purchase and then respond to questions about that purchase. This chapter primarily focuses on these specific purchases although more general attitudes and behaviours were also examined, in section 1.2.

1.1. Product purchasing

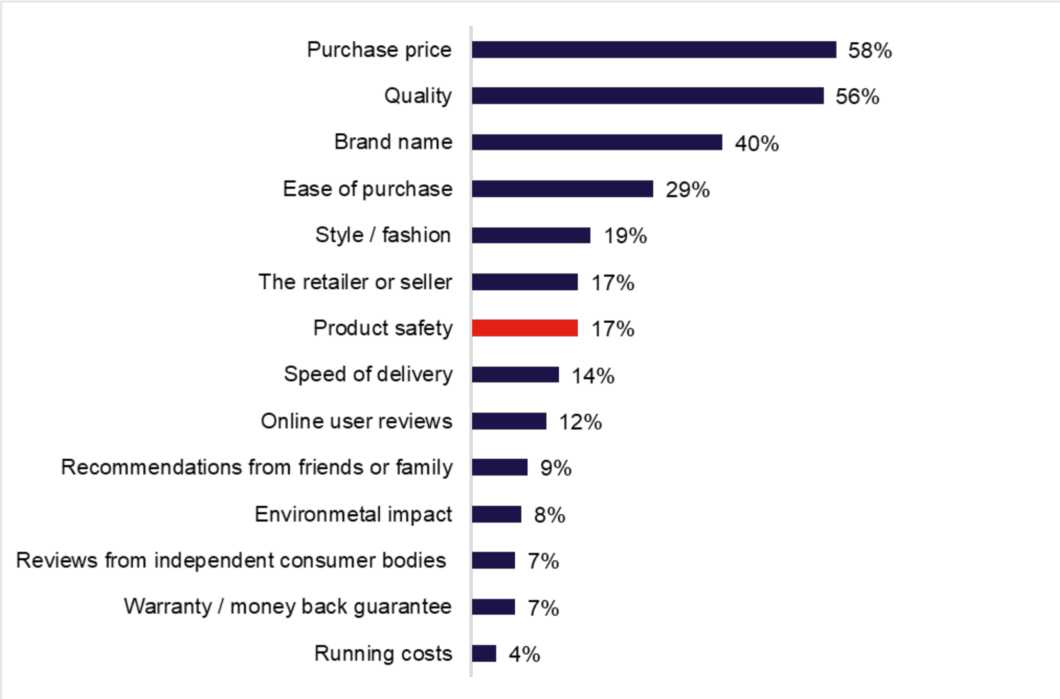
Consumers had a wide range of priorities when purchasing goods. Price and quality were the overriding concerns, while the safety of the product was a lower order consideration.

In the quantitative survey, consumers were asked to think about a specific recent purchase[9] and then to select all of the factors they had considered when buying this product. Purchase

[9] The questionnaire was routed so that respondents indicated all product categories they had purchased from within the last 3-6 months. Where multiple categories were selected, respondents were prompted to think about their most recent purchase in a ‘priority category’. These priority categories were selected based on those which are the direct responsibility of OPSS: baby products, white goods, toys, electrical appliances, cosmetics. If respondents had made purchases in multiple product categories, they were asked to think only about their most recent purchase in the highest priority category. The prioritisation was based on the likelihood of purchase, with those products purchased least frequently prioritised first, to ensure sufficient coverage of purchasers of all five categories.

price (58%) and quality (56%) were the most common responses, followed by brand name (40%) and ease of purchase (29%) (Figure 1). Seventeen percent of respondents stated that product safety was an influencing factor on their purchase. This ranks alongside the 'style' of the product (19%) and speed of delivery (14%).

Figure 1: Influencing factors when purchasing a product



Q: Which of the following did you take into account when you were considering buying this product? (select all that apply). Base: All who had made a purchase in the last 3 months (3562)

Respondents were then asked which of the factors they had considered was the most important. Again, quality and price were prioritised: 30% said quality was the most important consideration when purchasing the item, 28% said purchase price and 11% said brand name. Seven percent said that product safety was the most important factor they had considered when making their purchase decision.

1.1.2. Factors which influence safety considerations

The findings from the survey echoed the qualitative research results. Product safety was rarely a top of mind consideration for consumers when making a purchase decision. However, certain factors were found to increase the likelihood that product safety was considered. These are outlined below.

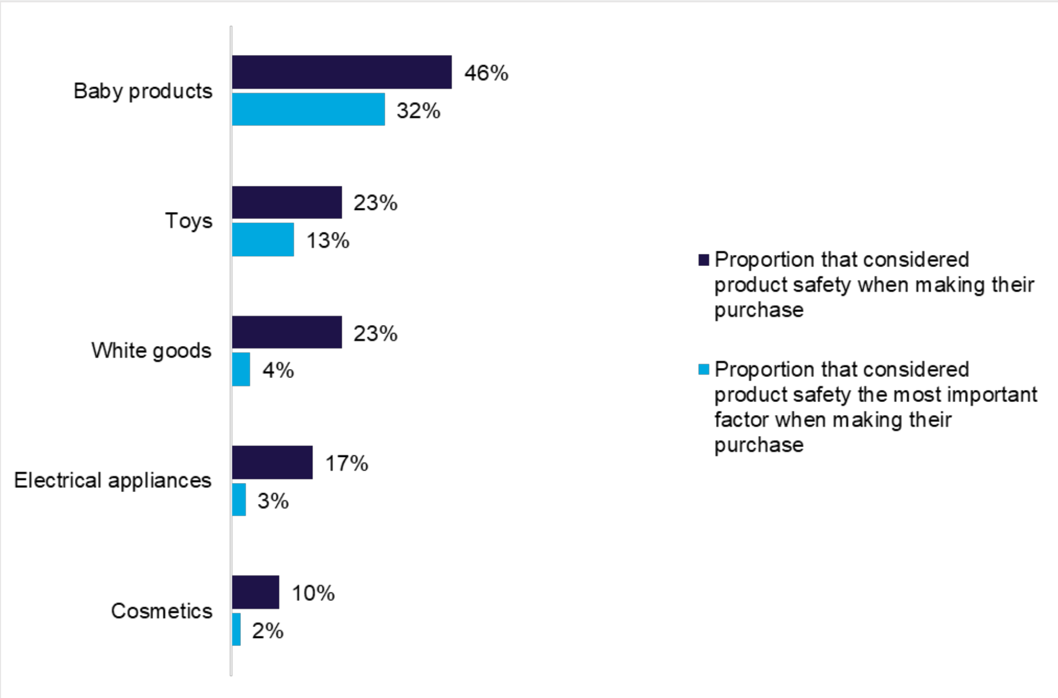
Product Type

Both the quantitative and qualitative elements of the research found that the most important factor influencing considerations of product safety was product type. **Product safety was of greater concern for certain product categories, namely baby products and toys.**

Forty-six percent of those surveyed that had purchased a baby product said they had considered safety when purchasing it, making it one of the top three considerations for this product type; (52% had considered purchase price and 58% had considered quality) (figure 2). For all other product categories, the survey found that purchase price, quality and brand name were the most commonly stated considerations. The survey also revealed that those purchasing cosmetics were the least likely to consider product safety: just 10% said this was a consideration when making their latest purchase.

Survey respondents were also asked to select which of the factors they had considered was *most* important in driving their purchase decision. Those that had purchased baby products and toys were significantly more likely to say that product safety was the most important factor (32% and 13% respectively). For white goods, electricals and cosmetics, product safety was rarely the most important factor when deciding to make a purchase (4%, 3% and 2% respectively) (Figure 2).

Figure 2: Consideration of product safety by product type



Q: Which of the following did you take into account when you were considering buying this product? (select all that apply; purchase price, running costs,

al impact, style/fashion, quality, product safety, brand name, the retailer or seller, warranty/money back guarantee, online user reviews, reviews from independent consumer bodies, recommendations from friends and family, ease of purchase, speed of delivery.) / Which of these factors was the most important when you decided to make this purchase. Base: All who had made a purchase (3562).

Parents spoken to as part of the qualitative research explained that product safety was top of mind when buying toys and baby products because these items were used directly by children, who were not capable of making safety judgements or assessing risks themselves. When asked about product safety for other items (white goods and electrical appliances) in their household, parents were more likely to be concerned about their children harming themselves through an accident, for example by touching a hot stove, and less worried that an appliance could cause a risk to their family because it was inherently unsafe. When probed about this, parents and other consumers explained that they would not be able to live a normal life, if they worried about the safety of all of their appliances.

"If you had to worry about safety then you'd be worried about everything really, I've got TVs in all my kids' rooms, I'd be a complete nervous wreck"

Female, mother of 5, recently bought a washing machine

The qualitative interviews also identified a common underlying assumption, that **items that inherently pose the highest risk, such as electrical appliances and white goods go through more safety checks and were, therefore, less likely to be faulty or cause harm**. When this assumption was explored further, consumers were unclear about the specifics of these safety checks – particularly around what they actually entailed. Despite this, consumers trusted that advanced checks were in place for products that could be dangerous. This was also underpinned by the assumptions highlighted in section 2 that UK products were generally well regulated, and manufacturers would not risk their reputation by selling unsafe products. This contributed to the low level of concern about product safety when purchasing.

Whether the purchase was made online

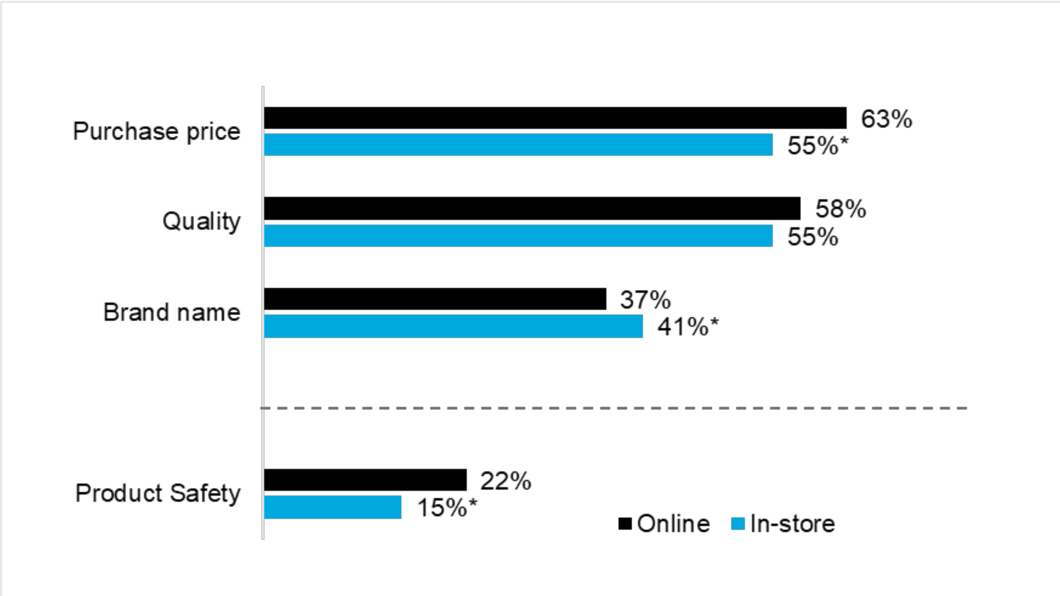
In both the survey and the accompanied shops, online and offline purchases were examined, to establish if considerations varied depending on how the purchase was made. Qualitative 'accompanied shops' were carried out for 16 online and 20 offline purchases.

Amongst those surveyed, 30% had made their recent purchase online, either from an online marketplace such as Amazon or eBay (45%), a high street retailer's website (20%) or from an online only retailer (16%). The majority (70%) had made their purchase instore, these consumers were most likely to have shopped at a high street retailer (50%) or supermarket (41%).

The survey results demonstrated that **regardless of whether a product was purchased online or in-store price, quality and brand name were the overriding priorities for consumers.** However, there was a difference in how these three factors were ranked by online purchasers compared with in-store purchasers. From the range of options provided, purchase price and quality were the most commonly cited considerations for both online and in-store shoppers (see figure 3). In-store shoppers were significantly less likely to indicate they had taken purchase price into account (55% vs 63%) and more likely to say they had considered brand name (41% vs 37%).

While for both online and instore purchases product safety was a lower order consideration than price, quality and brand name, the survey revealed a difference in the extent to which consumers reported that product safety had been considered for online and in-store purchases. From the range of options available, a higher proportion of survey respondents who made their purchase online indicated they had taken product safety into account: 22% said this was a consideration compared with 15% who made their purchase in-store (figure 3).

Figure 3: Factors taken into consideration when purchasing online vs in-store



Q: Which of the following did you take into account when you were considering buying this product (select all that apply). Base: all who made purchase online (960), all who made purchase in-store (2,602). Showing top three most commonly selected answer codes + 'product safety'. * Indicates statistically significant difference between 'online' and 'in-store' group.

The above finding may suggest consumers have a higher level of trust in the safety of products purchased in store.

'I take it for granted, if it's in store then it's safe'

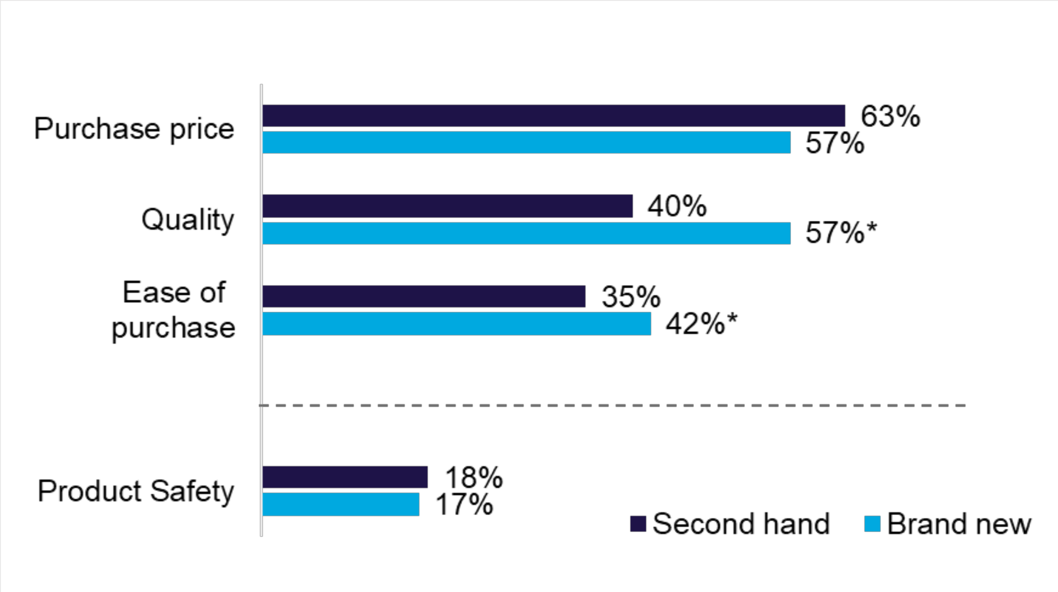
Male, recently bought a mini fridge

However, this is also likely to be linked to the type of product purchased online and instore. The consumer survey revealed cosmetics to be the product category least likely to be purchased online; 8% of consumers that had purchased cosmetics said they had done so online. Those that had purchased cosmetics were least likely to say they had considered safety when doing so, as shown previously in figure 2. In contrast, within the product categories where safety was found to be of greater concern, a larger proportion of purchases had been made online; 40% of baby products, and 40% of toys, as well as 44% of electrical appliances and 50% of white goods.

Buying second hand

Consumers surveyed were also asked whether their recent purchase was new or second hand. The majority (94%) were brand new, 4% second hand and 2% unused but missing original packaging or unsealed. The survey results suggested that whether the purchase was new or second hand had some impact on the factors prioritised during purchase. Those that had made a second hand purchase were significantly less likely to indicate they had considered quality (40% vs 57%) and brand name (23% vs 42%) compared with those who had made a brand-new purchase (figure 4). However, **buying second hand was not found to impact on the likelihood that product safety was considered**; 18% of those buying second hand and 17% of those buying brand new stated this was a factor they had considered when deciding to make their purchase.

Figure 4: Factors taken into account when purchasing second hand vs brand new



Q: Which of the following did you take into account when you were considering buying this product (select all that apply). Base: all who made purchased second hand (148), all who purchased brand new (3339). Showing top three most commonly selected answer codes + ‘product safety’. * Indicates statistically significant difference between ‘second hand’ and ‘brand new’ groups.

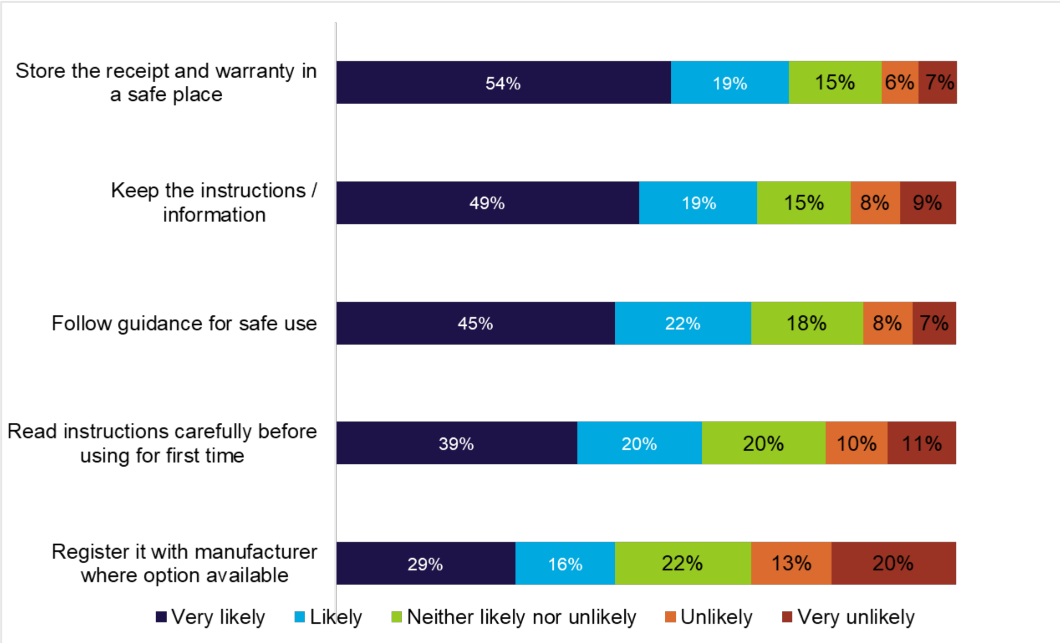
Consumers that made second hand purchases, spoken to as part of the qualitative research, expressed concern about second hand purchases breaking due to the quality of items, but these concerns centred around personal inconvenience and wasted money. The potential for a faulty product to present a safety risk was not a prominent concern. Again, when probed about the safety of second hand items, consumers tended to trust that a system was in place to protect the public, although with limited knowledge of how it worked or exactly who was responsible for it. For instance, one consumer interviewed explained that ‘seller refurbished’ products must be safe as they were all checked for faults as standard during refurbishment.

1.2. General post purchase behaviours

In addition to the questions about specific purchases, all consumers surveyed were asked about general post purchase behaviours. These behaviours included product registration, which is the registering of a product with the manufacturer, post purchase, so that owners can be contacted if a safety fault is later identified with a particular make or model of product.

Seventy three percent of consumers surveyed said that after making a purchase they ‘store the receipt and warranty in a safe place’ (figure 5). A much smaller proportion of respondents, (45%) said that they were likely or very likely to register a product with the manufacturer, where the option was available and 33% said they were unlikely or very unlikely to do this. Most consumers surveyed also reported being likely to follow guidance for safe use and reading instructions before using a product for the first time, but a sizeable portion said that they were unlikely to do so; 21% said they were unlikely to read instructions carefully and 15% were unlikely to follow guidance for safe use.

Figure 5: Likelihood of carrying out certain post-purchase behaviours



Q: Once you have bought something new, how likely is it that you will do each of the following… Base: All respondents (4256). Significance testing not applied to chart.

The results suggest that, to an extent, these habits and behaviours were linked to one another. Survey respondents who indicated they had never registered a product on average rated themselves as being less likely to take any of the other actions. Of those who had never registered a product before, 54% said they were likely to read instructions carefully and 62% were likely to follow guidance for safe use. For those who had registered a product in the past, this increased to 64% likely to read instructions carefully and 73% likely to follow guidance for safe use.

1.2.1 Product registration behaviours

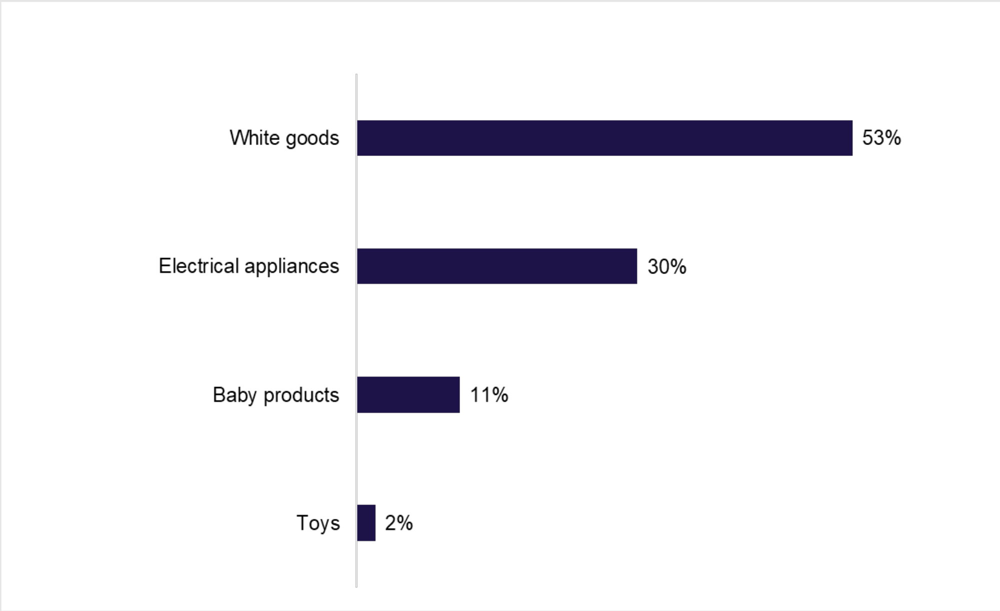
In line with the fact that 45% of consumers said they were likely to register a product when they purchase it, the research found that 47% of consumers had *ever* registered a product (49% had never done so). Four percent were not sure if they had or not[10]. Of the 47% that had ever registered a product, 28% said that they 'always' registered their products, and 25% said that they 'often' did. Forty-five percent said registering was something that they did 'sometimes'. **Of all the UK consumers surveyed, 14% indicated that they always register their products.**

When asked about their specific recent purchase, 23% of those who could have registered it had done so[11]. **Rates of registration were higher for certain product categories.** As shown in figure 6, those who had recently purchased a white good were most likely to have registered (53%), compared with 30% of those who had purchased an electrical appliance, 11% of those that had purchased baby products and 2% that had purchased toys.

[10] These have been calculated by taking the total proportion that said they had registered their specific product as well as any respondents that said they registered any product at the follow up question asked of all those who had not registered their specific product or who were not asked the specific question because they had purchased a product outside of a registerable category.

[11] Not all products can be registered, only respondents who had purchased Electrical appliances, Baby products, Toys, White goods or Furniture or furnishings were asked about registration.

Figure 6: Rates of registration by product type



Q: Did you register this product when you bought it? Base: All who had purchased in 'white goods' category (334), All who had purchased in 'electrical appliances' category (606), All who had purchased in 'baby products' category (316), All who had purchased in 'toys' category (415)

Registration was typically done online either through the manufacturer's website (48%) or retailer's website (16%). A further 15% had registered by phone and 9% by post.

1.2.2. Reasons for registering a product

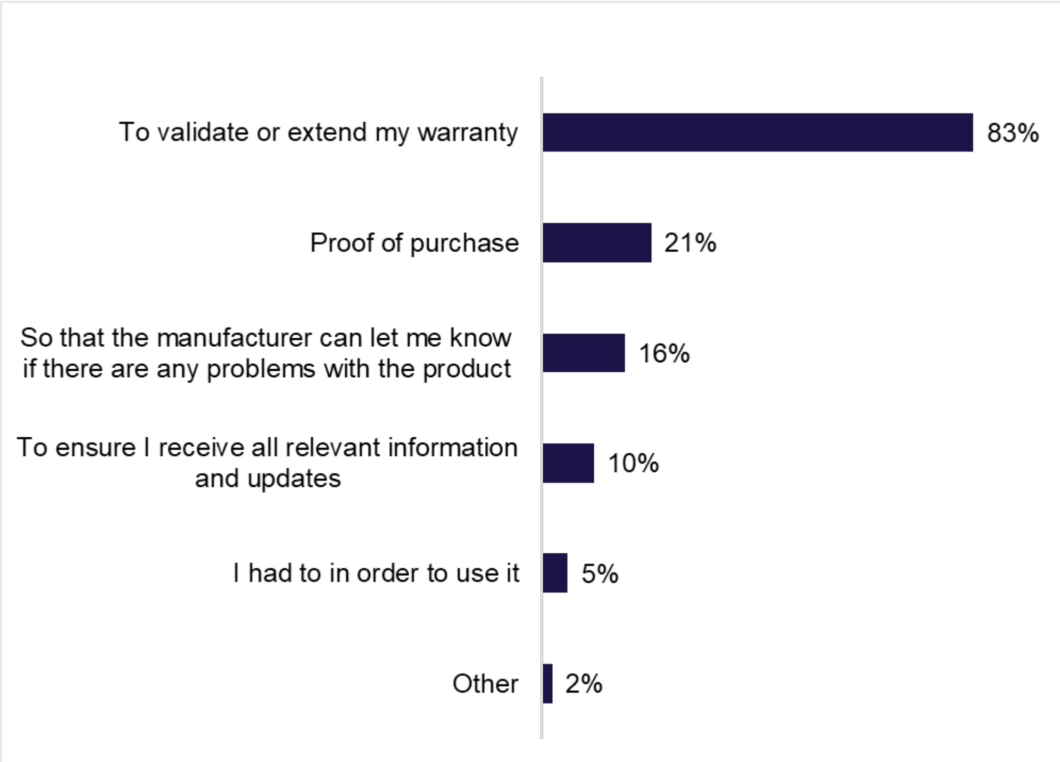
Both the quantitative and qualitative research found that those **consumers that had registered their products, were not motivated to do so by safety considerations. Consumers overwhelmingly equated registration with activating or extending their warranty.**

'You're shooting yourself in the foot if you don't register…(it's) effectively like insurance'

Female, 31, recently bought fridge

Overall, 83% of consumers that said they had registered their recent purchase said they had done it to validate or extend their warranty (figure 7). Only 16% of consumers said they had registered so that the manufacturer could let them know if there were any problems with the product, and almost all selected this in conjunction with another reason – just 3% said this was their sole motivation for doing so.

Figure 7: Reasons for registering recent purchase



Q: Why did you register it? (Select all that apply) Base: All who registered their recent purchase (412). Significance testing not applied to chart.

1.2.3. Reasons for not registering a product

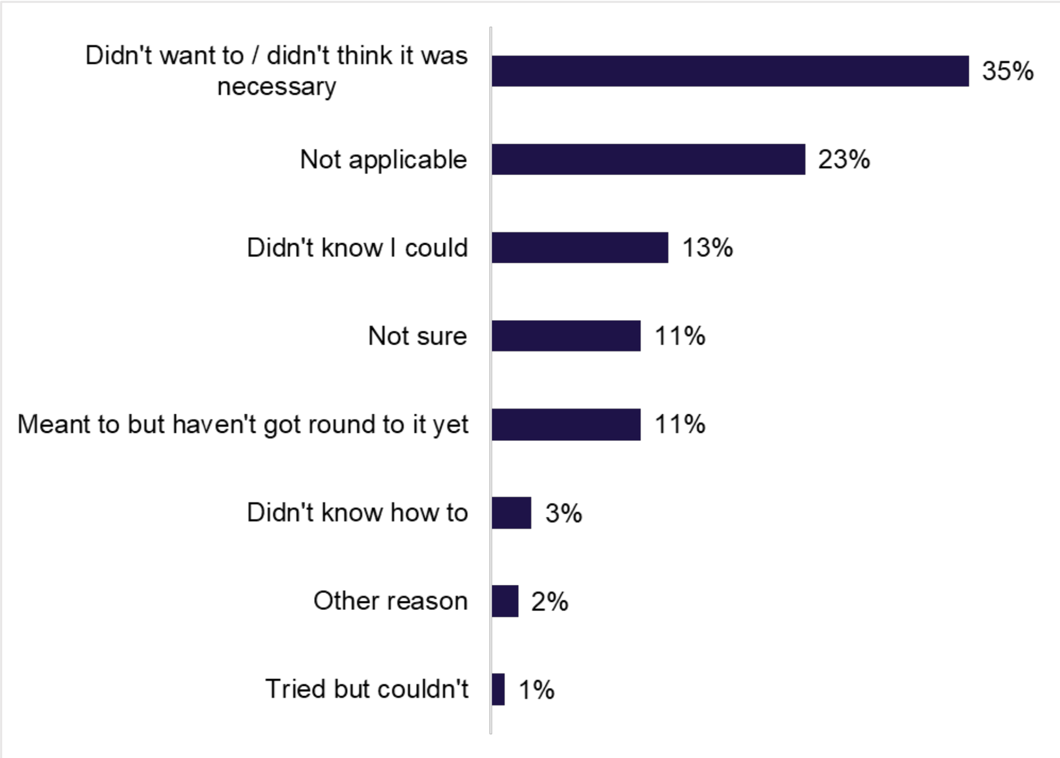
The qualitative and quantitative research identified two main barriers to product registration. **The first was a view that registration is unnecessary or has a limited benefit to consumers** and the second was a lack of awareness of the purpose of registration and the fact that it is possible.

In the qualitative phases of the research, consumers often could not identify any benefit of registering beyond the warranty. For those that did not feel the warranty was necessary, registration was seen as irrelevant. Some also felt that if a retailer holds contact information for a customer, for instance for delivery purposes, they could be contacted if necessary.

Consumers surveyed who had not registered their specific recent purchase[12] were asked why they had chosen not to. Thirty-five percent said they ‘didn’t want to or didn’t think it was necessary’. These respondents were asked a follow up question to pinpoint why they believed this. Fifty-two percent of this group said they didn’t see any benefit and 23% said they didn’t want to spend their time on it. Six percent indicated they didn’t need to register either because the retailer already had their details, or because they already had a warranty (figure 8).

[12] This question was only asked to respondents whose recent purchase was in the white goods, electrical appliance, baby products, toys or furniture/furnishings category.

Figure 8: Reasons for not registering their recent purchase



Q: Why didn't you register it? Base: All who recently purchased a product in registerable category but did not register it (1032). Significance testing not applied to chart.

A small proportion of quantitative survey respondents indicated that concerns about being sent marketing deterred them from registering (3% of all those who didn't register overall). This concern was also expressed during the qualitative interviews, primarily when consumers traded off the benefits of registering against the drawbacks. The perceived benefits of registering were deemed not to be worth the time, effort or the perceived risk of receiving additional, unwarranted communications from retailers or manufacturers.

'I already have cover from my insurance so there's no need to register, I'd only end up getting a load of emails I don't need'

Male 32, recently bought fridge

The second barrier was a lack of awareness of both the purpose of registration, and the fact that registration is possible. Thirty-six percent of all survey respondents who did not register their recent purchase indicated that they believed registration was 'not applicable' for their product or 'didn't know they could' register. A further three percent didn't know how to (figure 8).

In addition to the two barriers identified, the survey also found that registration was a very low priority for consumers. Even when consumers knew they could register, and intended to do so, a lack of time and motivation had prevented them from doing so. Eleven percent of survey respondents that had not registered said that they 'meant to but haven't got around to it yet' and a small proportion (1%) said they tried to register but were not able to (figure 8).

These findings echoed results from the qualitative research. Consumers interviewed pointed to the fact that they were prompted to register at the moment of installation, when the installation itself was the priority and their attention was elsewhere. Once installation was complete, even in cases where the intention to register existed, it was relegated as day-to-day priorities took precedence. Intentions to register were also undermined by a perceived lack of urgency – linked to the lack of awareness of the benefits of registering other than warranty. There was also a perception that the process would be difficult or time consuming. As a result, consumers found it easy to forget or justify putting off registering their products.

‘I have recently purchased a washing machine and still have the product registration documents in my utility room – each time I see them I am reminded to register but even the lure of the 10-year warranty seems to be a fairly uninspiring reward for the time it will take’

- *Male, 49, recently bought washing machine*

2. Interaction with the product safety system

Chapter summary

The research found that consumers typically trusted the product safety system

Faults with products were primarily associated with inconvenience and cost, rather than the potential for a safety issue to arise.

Consumers assumed that brands would only make safe products, and that regulations were in place to stop potentially dangerous products from entering the market.

Consumers often relied on their own lack of experience of a safety issue to confirm their assumptions; even those that had experienced issues with products they owned, for instance safety warnings or product recalls, viewed them as 'one-off' isolated incidents.

Product safety recalls had not always prompted action – almost one in five who had seen a recall or safety warning for something they owned had taken no action.

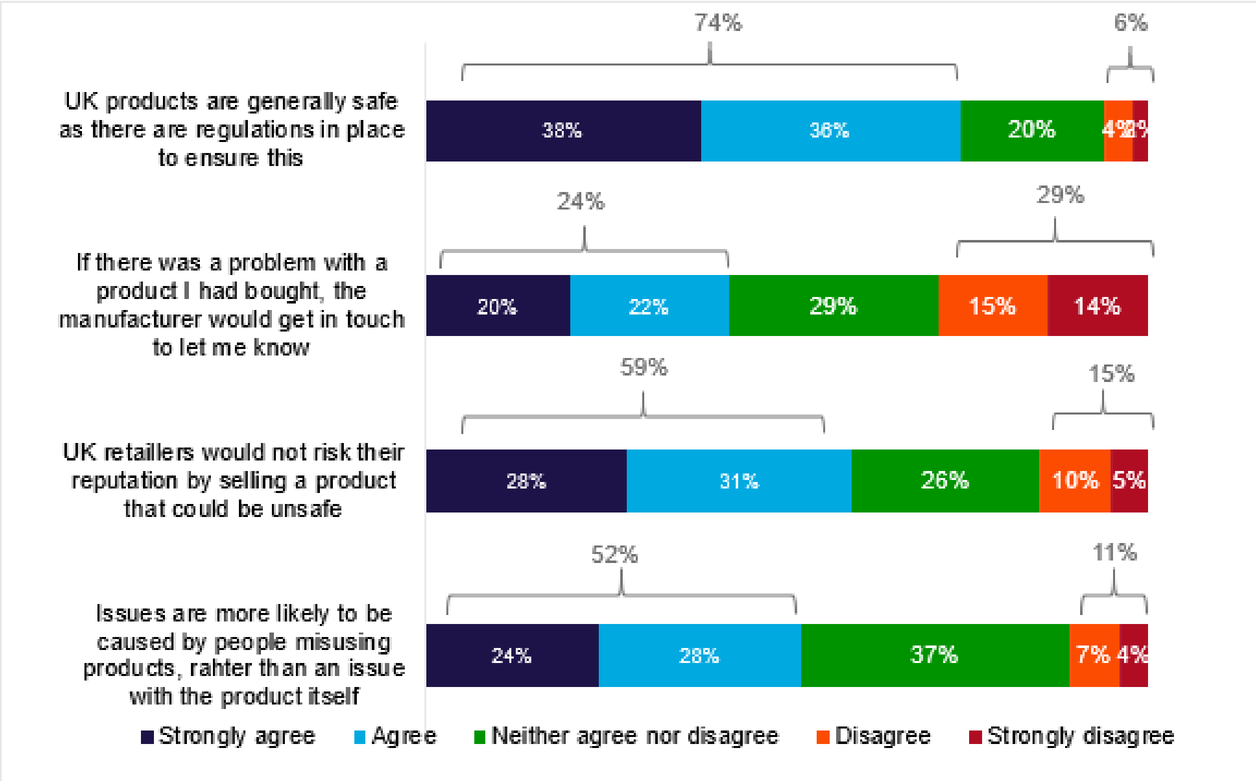
This chapter explores the assumptions consumers were found to make about the different elements of the product safety system and how interactions with the system impact on attitudes and behaviours.

2.1. Consumer attitudes towards the product safety system

Consumers across all elements of the qualitative research generally believed their products would be safe. It was clear that consumers implicitly trusted that an effective safety system was in operation - one in which government, manufacturers and retailers worked together to ensure products on the market were safe.

The quantitative survey findings also support this as evidenced by the levels of agreement with the statements about the system shown in figure 9. These results are discussed throughout the following section.

Figure 9: Level of agreement with statements about the product safety system



Q. To what extent do you agree or disagree with the following statements about product safety. Five-point answer scale, where 1 is strongly disagree and 5 is strongly agree. Base: all respondents (4,256). Significance testing not applied to chart.

2.1.2. Trust in existing regulation

Seventy-four percent of survey respondents agreed that ‘UK products are generally safe as there are regulations in place to ensure this’, echoing assertions made by consumers during the accompanied shops and the deliberative workshops. Exploration of this view, in the qualitative research, revealed that it was largely based on what consumers think should be happening rather than what they knew about how products were regulated and checked for safety issues.

Consumers interviewed viewed the government as having a legal and moral obligation for ensuring the safety of its citizens. Therefore, they also felt the government held overall responsibility for ensuring that manufacturers and retailers comply with safety standards. Despite limited awareness of safety regulation, or the effectiveness of it, a level of implicit trust was identified. Consumers trusted that the government would effectively manage the system to ensure the products available for them to buy and use would be safe.

Consumers interviewed believed that regulation was likely to be most stringent for items and products that they deemed to be ‘higher risks’, for instance electrical items that involve heating elements (hair dryers and styling implements) and whitegoods such as ovens and tumble dryers. Parallels were regularly drawn between these ‘high risk’ household items and the way in which safety is regulated in the car industry.

‘I don’t really know how it works but I assume that there will be a regulatory body making sure that products have gone through the right safety checks to be allowed on the market. It probably works a bit like how car safety is regulated.’

– Male, 54, recently bought an oven

2.1.3. Views of manufacturers and retailers

This implicit trust in the government was accompanied by an assumption that manufacturers and retailers would also be unlikely to make or sell unsafe products. The rationale for this assumption, provided by the consumers interviewed during the qualitative research, was that neither manufacturers nor retailers would risk reputational or financial damage by making or selling items that were unsafe. Consumers believed that retailers would take the verification of the manufacturers supplying them with goods seriously, given the potential for damage to their own reputation if products were found to be faulty or of poor quality. Again, this view was reflected in the quantitative survey responses, 59% agreed that UK retailers would not risk their reputation by selling a product that could be unsafe (figure 9).

Consumers interviewed also expressed some distrust about the behaviour of manufacturers, specifically that some may develop products which were 'designed to break' after a certain amount of time to force owners to replace them. Across both phases of qualitative research, consumers expressed dissatisfaction with household goods that regularly needed replacing due to a fault. It should be noted however that these faults had rarely prompted consumers to consider potential safety risks due to the fault, their dissatisfaction was a consequence of the inconvenience and financial cost of replacing the item.

'Nowadays everything is designed to break, it's almost like they do it deliberately. Years ago, your appliances would last for ages, now you have to replace them all the time.'

– Female, 32, recently bought a fridge-freezer

2.1.4. Understanding the lack of engagement with product safety

Consumers pointed to the fact that safety information is often displayed at the back of instruction manuals, or at the bottom of the product boxes and is therefore largely 'out of sight, out of mind.' On top of this, consumers said they found safety information difficult to engage with, given it was often relatively complex, and in a small font-size. Furthermore, consumers recognised that it was rarely a requirement to engage with safety information in order to use a product, leading them to the conclusion that it was not something they needed to expend time or effort on.

Consumers interviewed also interpreted the lack of visibility of product safety information to mean that the products were unlikely to be 'actually dangerous' and instead was included as a 'regulatory requirement,' insisted on by government. It was clear that over time, ignoring such safety information had become habitual for consumers, further increasing the likelihood that product safety would not be a consideration for them when buying or using their products. This was evident by remarks consumers made such as 'I never look at safety instructions' and 'I know exactly how to use these products.'

Despite the fact that a significant proportion of consumers surveyed could recall seeing or hearing about a product recall or safety warning (discussed in detail in section 2.2), the assumption that safety incidents were a rare occurrence was commonly shared. Consumers from the qualitative research explained that safety issues were more likely to be a consequence of other people's recklessness or a 'one-off' isolated incident. Similarly, 52% of the quantitative survey respondents agreed with the statement 'safety issues are caused by people misusing products, rather than an issue with the product itself' (figure 9).

Consumers, spoken to as part of the qualitative research, also pointed out that following 'sensible behaviours' would ensure safety, despite not necessarily engaging with safety guidance themselves. When probed on what these behaviours would entail, consumers pointed out that cleaning ovens properly and not overloading washing machines would be sufficient. Interestingly, these behaviours were not always followed by those who commented on ‘other consumer recklessness.’ For instance, this research found instances where consumers ‘confessed’ that on some occasions, particularly when busy, they may overload their machines or avoid cleaning out tumble-dryers or ovens. In these cases, they explained that they would ‘just know’ when their own behaviour would result in a tangible safety issue. Further to this, one consumer pointed out that he assumed household appliances were now robustly designed to withstand ‘daily wear and tear.’ For him, the need to follow safety recommendations had decreased over time.

> *‘We all know the vast majority of us are busy and constantly loading and unloading. These machines are designed to withstand us, if they weren’t they’d break within two minutes!’*
> - Male, 34, recently bought a washing machine

In addition to the reasons outlined above, consumers interviewed as part of the accompanied shops and depth interviews also articulated a need to trust the safety of their products, given the importance and presence of household appliances in consumers lives. Without this trust, consumers argued that they would be unlikely to live a ‘normal life’ due to constant concerns about the safety of their everyday appliances.

2.2 Experiences of product safety recall notices and safety warnings

Sixty five percent of survey respondents could remember seeing a product safety recall notice or other safety warning from a retailer or manufacturer. Fifty six percent of these heard about the recall through media channels such as TV or newspaper. Thirty-two percent had seen a product recall notice, or other safety warning about something they personally owned. Recalls of motor vehicles and motor vehicle parts dominated this. Given they fall outside of the categories of product that OPSS is responsible for, respondents were asked to discount food and vehicle recalls when responding to this question. Thirty three percent of this group said the recall they were thinking about in responding was a motor vehicle or motor vehicle part. If the question had asked about motor vehicles / motor vehicle parts, it is likely that the percentage of respondents indicating that they had experienced a recall or safety notice would have been higher.

Respondents spoken to as part of the qualitative research also referred to motor vehicle and food items being recalled, as well as high profile white good recalls, such as the Whirlpool tumble dryers, Samsung mobile phones and certain baby products. Few could spontaneously remember a cosmetic item being recalled which may help to explain why these products are considered safer.

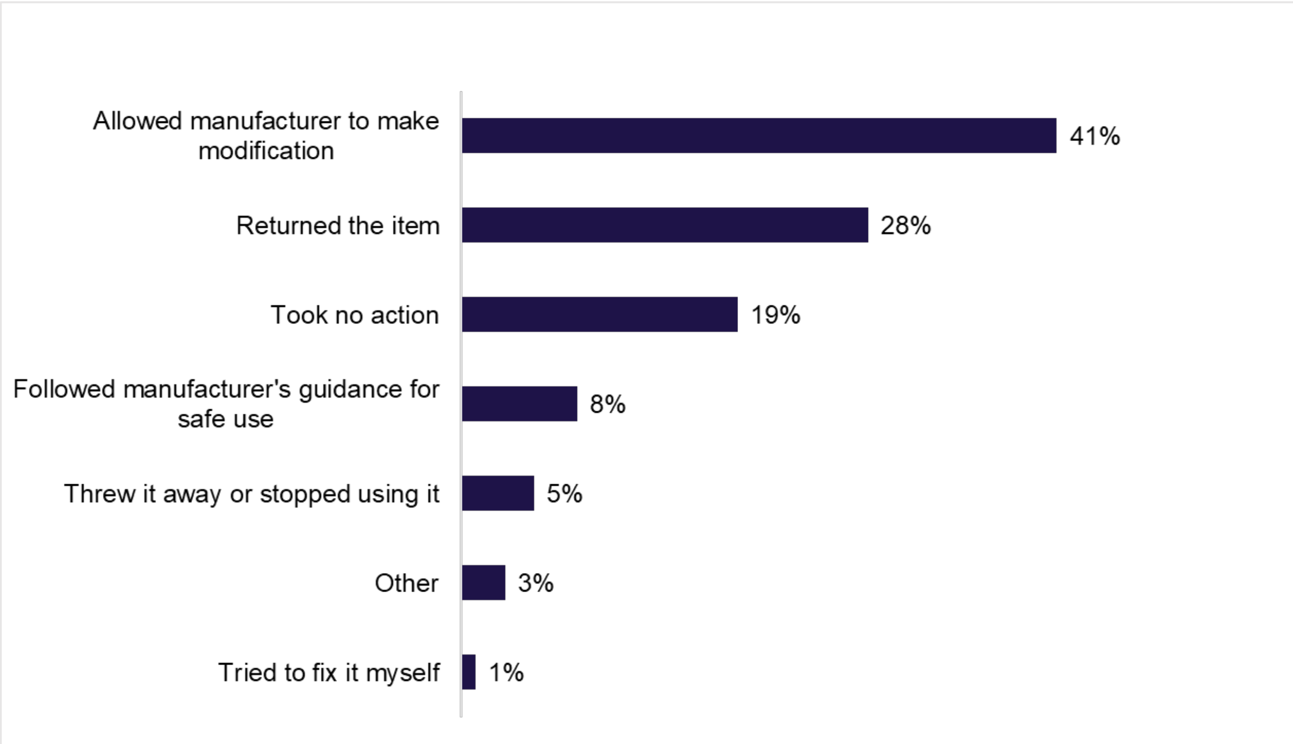
Survey respondents who had experienced a product recall or other safety warning about something they owned were asked how they heard about this recall. Fifty-eight percent had been contacted directly by the seller or the manufacturer. Twenty-six percent heard about this through the media and 17% had found out through a notification displayed in a public place.

These survey respondents were then asked what actions they had taken. Their responses varied but the most common course of action was to ‘allow the manufacturer to make modifications’ (41%) (figure 10). Twenty-eight percent of respondents said they returned the item and a smaller proportion followed the manufacturer’s guidance for safe use (8%). Five percent stopped using it. In the qualitative research consumers who had a product replaced or modified following a product safety recall did not have heightened concerns around using it again subsequently. There was typically an assumption that the product was now checked and guaranteed to be safe.

'My tumble dryer was recalled because it started smoking. I contacted the manufacturer and they replaced it. Now I know it will be absolutely fine because they've had proper engineers look at it.'

- *Female, 30, recently bought speakers*

Figure 10: Responses to a product recall



Q: Which of the following actions did you take? Base: All who have experienced a product safety recall or other product safety warning for something they own (811). Significance testing not applied to chart.

Nineteen percent of survey respondents reported taking no action after seeing the recall or safety warning. Qualitative research revealed a number of reasons why consumers would not respond to a recall including the time and inconvenience of organising a return or modification, and the belief that they could avoid any safety risks by taking additional care when using the item. As outlined in section 2.1 above, the quantitative survey revealed that consumers tended to believe that safety issues were a result of careless use, rather than an inherent issue with the product line.

Previous experience of a recall or safety warning for a product they owned was found to have some impact on future habits and behaviours. Survey respondents who indicated they had experienced a recall or safety warning for something they owned did not rate themselves as more likely to follow guidance for safe use. However, this group did, on average, rate themselves as more likely to store the receipt and warranty (80% vs 71%) and register products (55% vs 43%) compared with the group who had never experienced a recall or safety warning.

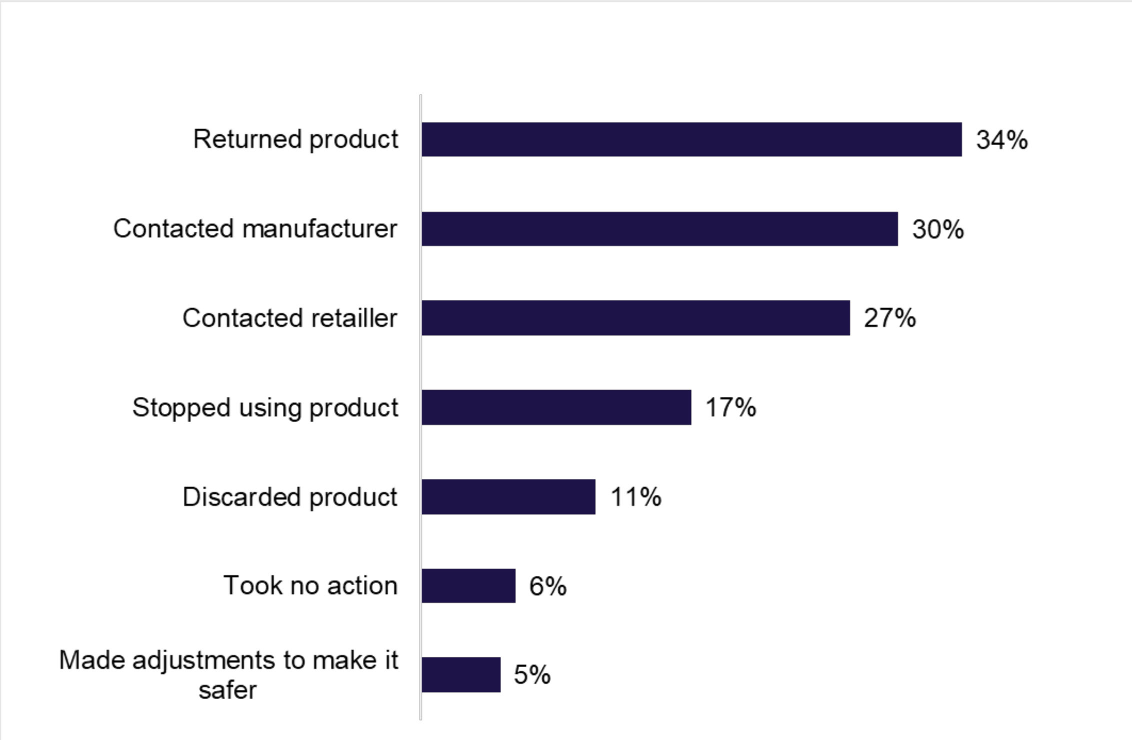
2.3 Experiences of product safety incidents

A smaller proportion of consumers had experienced a safety incident due to a defective product. Sixteen percent of survey respondents reported directly experiencing a safety issue or defect with a product, most commonly due to a defective electrical appliance (47%) or white good (25%). Twelve percent of those who had experienced a safety issue or defect reported that it had caused damage to their property or other household items, and 9% said that it had caused harm to the user.

2.3.1 Actions taken in response to a safety issue or defect

Experience of a safety issue or defect was more likely to have prompted action than a recall or safety warning (figure 11). Six percent of those who had experienced a safety issue had taken no action (compared with 19% of those who had experienced a recall / safety warning for something they own). Thirty percent had contacted the manufacturer (30%), 27% had contacted the retailer and 34% had returned their faulty product. Seventeen percent discarded and 11% stopped using the product whilst 5% said they had made adjustments to make it safer to continue to use the product.

Figure 11: Action taken following experience of safety issue or defect



Q. What action did you take following this experience of a safety issue or defect? Multiple responses permitted. Base: all who have ever personally experienced a safety issue or defect with a product (622). Significance testing not applied to chart.

The qualitative research showed that consumers have similar reasons for not taking action in response to a safety issue or defect as they do for ignoring recalls and safety warnings. Again, those who did not return their products cited inconvenience of needing to contact the manufacturer to replace the item or experiencing difficulties in doing so. Some found it quicker and easier to work out a way to continue using the product despite it not being fully functional, the qualitative research uncovered a number of instances where consumers had found 'work-arounds' to make otherwise faulty products work. One consumer pointed out that it was not uncommon for him to tape down loose wires on his products. Despite living in a semi-detached household with his wife and children, he had not considered how the products themselves could present a safety risk to others. So, while he had told his children not to use them, in case they did not work correctly, this was not as a result of the safety issues they could present. While this is an isolated example, this assumption that individual behaviour is unlikely to impact on safety and that faulty products pose little risk, was commonly expressed across the interviews.

'The dog tends to chew through wires, but I can't afford to replace everything that breaks in this house. Tape will do the trick nine times out of ten. I tell the kids not to use the hoover which is all taped up as you need a special knack at holding it so the wires work!'
- Male, 32, recently bought a laptop

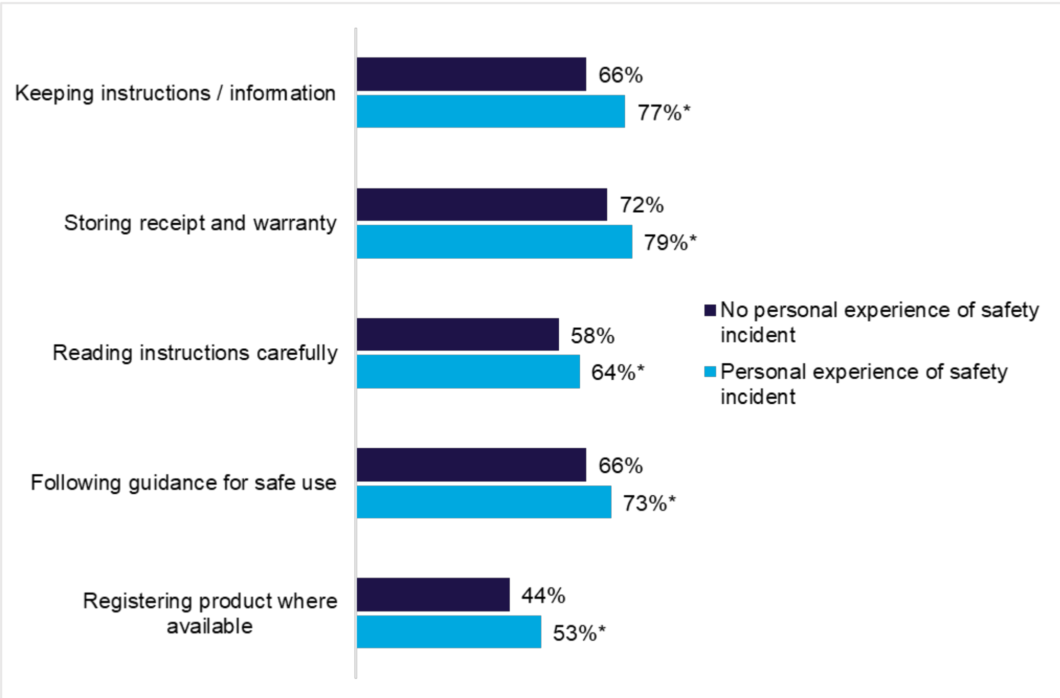
Similarly, consumers interviewed described instances where their own ovens had sparked or washing machines had begun to smoke. In both these cases, these issues were explained as a 'product fault,' safety was not raised as a specific issue.

'I had a tumble dryer that had begun to smoke. I realised that there was a design fault in one of the filter systems because dust was getting caught in it…I just started making sure I cleaned it really well.'
- Female, 30, recently bought a speaker

2.3.2. Impact on future behaviour

As shown in figure 12, survey respondents who had previously experienced a safety issue or defect were found to be slightly more likely to exhibit the behaviours outlined in section 1.2.

Figure 12: Impact of personal experience of safety issue on likelihood to carry out certain behaviours



Q. Once you have bought something new, how likely is it that you will do the following. Base: All who have not personally experienced a product safety incident (3,629), All who have personal experience of product safety incident (622). * Indicates statistically significant difference between 'no personal experience of safety incident' and 'Personal experience of safety incident' group.

Fifteen percent of those surveyed who had experienced a safety incident said they were unlikely or very unlikely to follow guidance for safe use when they purchased a new product. Twenty-six percent said they were unlikely or very unlikely to register it with the manufacturer. This supports findings from the qualitative research that, even after a personal experience of a safety issue, consumers still have high level of trust in the safety of the products they buy, with faults or defects viewed as one-off incidents.

2.3.2 Impact on attitudes to product safety

Personal experience of a product safety incident was also found to have no impact on trust in the product safety system as a whole. The survey revealed that those who had experienced an issue were just as likely to agree with the statement 'UK products are generally safe as there are regulations in place to ensure this' (76% vs 74%). As previously discussed, qualitative research found that consumers rarely considered product issues or faults to be indicative of a wider safety problem and tended to view such issues as potentially causing individual, rather than a collective impact.

In addition to this, the qualitative research revealed that consumers tended to view product faults as an issue with an individual appliance, rather than indicative of wider issues with the product batch or manufacturer. As previously discussed in section 2.3.1. for some the effort required to contact the manufacturer or retailer about their specific appliance was deemed too cumbersome – and they chose instead to it devise 'work arounds' or simply stop using their appliance instead. The common assumption that a product fault would only affect the individual user, meant that consumers who experienced an issue rarely felt a need to engage with the product safety system.

3. Role of actors in the product safety system

Chapter summary

Consumers were often unaware of how the product safety system worked or how responsibilities were shared between the different actors within it.

Manufacturers and retailers were found to be the most trusted source of information on product safety.

Consumers typically believed that manufacturers had greatest responsibility for setting product safety standards, ensuring they were met and resolving any product safety issues.

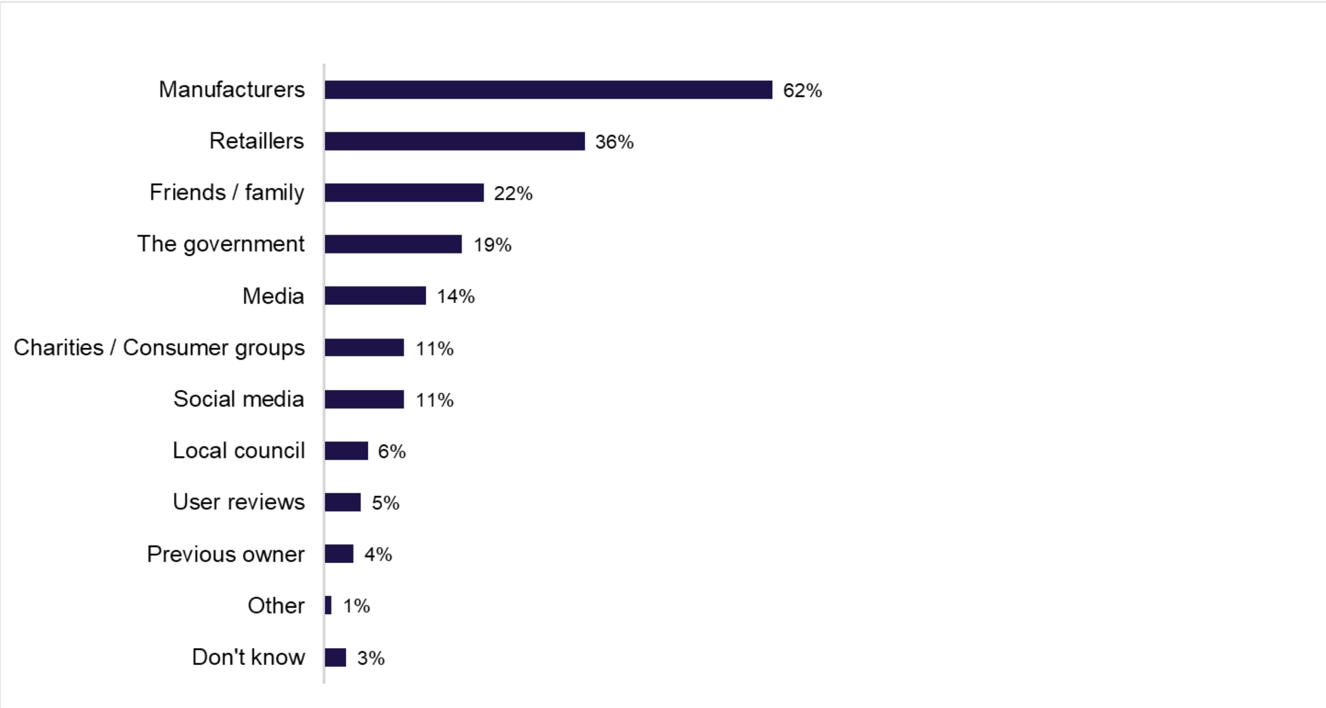
Consumers expect the government to play a strong role in setting and upholding legal safety requirements.

This chapter outlines how consumers view the role of different actors in the product safety system. In all phases of the research, consumers were asked about the roles and responsibilities of the government, manufacturers, retailers as well as other actors, including consumer groups and consumers themselves in relation to product safety. This was explored in greater detail in the deliberative workshops. As well as sharing unprompted thoughts, in the workshops participants were given information about how the system works in practice, both as a way to identify misconceptions and to facilitate more detailed conversations about the system.

3.1 Trusted sources of information on product safety

When asked in the survey who they would trust most to provide them with information on product safety, consumers overwhelmingly pointed to manufacturers (62%), followed by retailers (36%) (figure 13). Those who had experienced a product recall for something they owned were significantly more likely to trust manufacturers as a source of information (68% compared with 60% among those that had not).

Figure 13: Most trusted sources of information on product safety



Q. Who would you trust the most to provide you with information or advice on product safety? (up to three answers permitted) Base: all respondents (4256). Significance testing has not been applied to this chart.

The findings of the quantitative survey supported the learnings from the qualitative research. Consumers interviewed explained how manufacturers and retailers were generally their 'first port of call' when seeking advice about their products. However, echoing the findings discussed in chapter 2, consumers had generally been motivated to contact manufacturers about faulty items to gain a replacement or have the item fixed, either by activating or invoking their warranty. Safety was rarely considered. The trust in manufacturers and retailers was likely to be a consequence of the transactional relationship consumers have with them, and the view that fixing or replacing the product was the manufacturers responsibility, rather than because they were felt to be implicitly trustworthy.

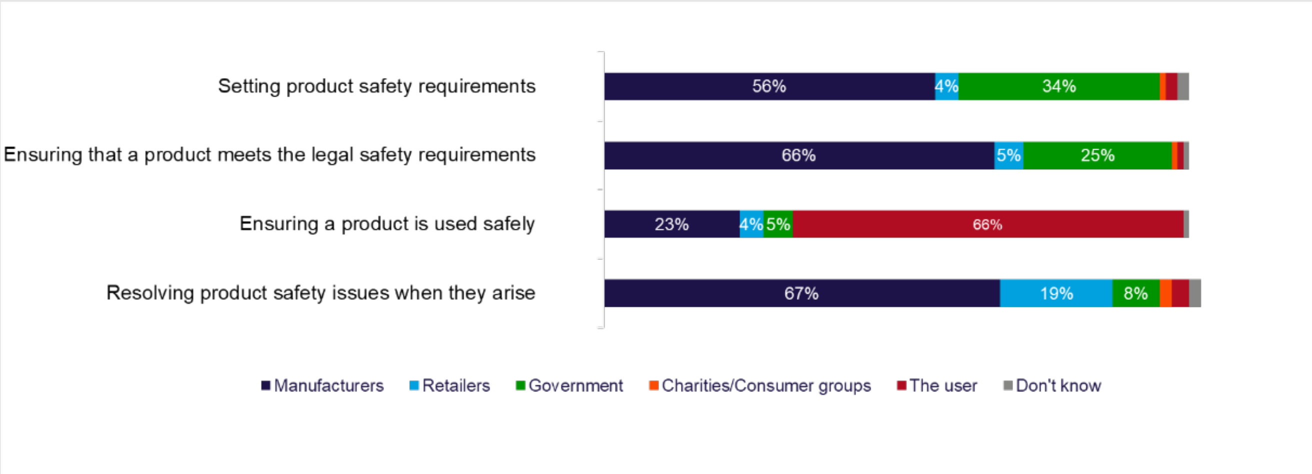
'When there's an issue I suppose the first place I'd go is back to the manufacturer or where I'd bought it. Especially if it's within the warranty.'
- Female, 23, recently bought a washing machine

3.2 Actors responsible for ensuring products are safe

As part of the survey, consumers were asked who they felt was responsible for four different aspects of product safety. Sixty seven percent said that manufacturers had most responsibility for resolving safety issues as well as for ensuring that products met legal safety requirements (66%) (figure 14). In addition, 58% of consumers said that manufacturers also had most responsibility for setting product standards.

The Government was also seen to have a role to play. Thirty four percent of consumers surveyed believed government was most responsible for setting product safety requirements; this was most frequently seen as the role of national government (22%), rather than the EU (9%). Twenty five percent said that government had a leading role in ensuring a product met legal safety requirements, again typically national government (18%) rather than EU (5%). Users themselves were seen as responsible for ensuring their products were used safely (66%).

Figure 14: Responsibilities within the product safety system



Q. In your opinion who is most responsible for… Base: all respondents (4256). Significance testing has not been applied to this chart.

While these figures indicate an expectation that manufacturers will play a leading role in the product safety system, qualitative research found that consumers do not have a clear understanding or awareness of what manufacturers are actually responsible for. In the deliberative workshops, it became evident that consumer perceptions were built on a range of assumptions and a lack of awareness about how the system operates. Therefore, while the survey results suggest that manufacturers were seen to have the greatest role to play, this should not be interpreted as an expression of awareness of and satisfaction of the responsibility manufacturers are currently taking over ensuring product safety.

3.3. Concerns with current practice

In the deliberative workshops, consumers were initially asked for their views on the current effectiveness of the product safety system and the roles they thought key actors played. Following on from this exercise, they were introduced to a high-level version of the current system (figure 15) which outlined the current roles and responsibilities of key actors. This safety system map was used as stimulus for discussion, particularly regarding whether the system operates in a way which consumers had expected; whether there were any gaps between expectation and reality and whether they had any concerns as a result. Given the purpose of this map as a discussion aid, it does not fully represent the intricacies of the whole system. Furthermore, given the complexity and evolving nature of the system, it should not be taken as a standard and agreed representation of the safety system.

Figure 15: Prompt used in deliberative workshops - Outline of the current product safety system

	1. MAKING SAFE PRODUCTS	2. ENSURING SAFETY AT SALE AND AFTER	3. ENSURING CORRECT USE	4. ENFORCEMENT / CORRECTIVE ACTION
EUROPEAN UNION	Sets most of legal framework	Encourage countries to share info about safety risks		Publish product recalls
UK GOV (OPSS)	Sets some areas of law Provide guidance for business & trading standards Scientific evidence for safety hazards	Share intelligence Identify national risks and issues Support trading standards	Run public safe use campaigns Research consumer behaviour	Publish product recalls Support trading standards & large-scale recalls Investigate national issues
STANDARDS & TESTING BODIES	Create voluntary standards Test higher risk products		Create voluntary standards to encourage safe use	
LOCAL AUTHORITY TRADING STANDARDS	Provide advice to manufacturers & importers	Carry out risk-based surveillance If appropriate, test products If deemed a risk - monitor & investigate consumer complaints	Run / participate in safe use campaigns	Advice businesses on corrective action Remove unsafe products on market / from entering If necessary, take enforcement action
MANUFACTURERS (or importers if product made outside EU)	Produce safe products Conduct or organise safety tests	Have measures to identify, monitor and act on safety risks/issues Report risks to trading standards	Ensure design has considered all types of reasonable use & include safety instructions	Contact customers if issue found Take corrective action (e.g. repair, recall, consumer warning)
RETAILERS & DISTRIBUTORS		Assure themselves that products they sell/distribute are safe		Share info about recall / safety issues with customer
CONSUMER ORGS			Provide information on safe use	Raise awareness of recalls
CONSUMERS			Read and follow safety instructions	Register appliances Respond to recalls

Of greatest concern to consumers when engaging with this map was the lack of clarity on the chains of communication and lines of responsibility between consumers and manufacturers, retailers and government. Consumers pointed out that the system appeared to be reliant on consumer awareness of, and engagement with, safety - particularly around registering appliances and responding to recalls. Consumers expressed concern that it would be unlikely they would know that their product was unsafe as a result of a recall.

Figure 16: Prompt used in deliberative workshop - details of high-profile product safety incident

- Manufacturer X identified a fault with two of their products, manufactured over a 10 year period between 2005 and 2015. In some cases a fault with the product existed which could present a fire risk.
- Manufacturer X asked the public to check whether their product was one of those affected and, if so, to contact the company through its dedicated website. Consumers were also advised to wait for an engineer visit, although due to demand this could be up to 12 months
- Manufacturer X and their local Trading Standards agreed collectively to advise that owners who had a potentially effected product to continue using them, provided they took certain precautionary measures and did not leave the product unattended when in use.
- After the advice was issued, there was a fire at a block of flats which began as a result of a faulty machine – no one was injured but it took over 100 officers to bring the blaze under control
- In the months following the fire a consumer group launched a judicial review against the advice, as it thought the local Trading Standards should have enforced a change in advice earlier. Following the filing of the judicial review, Trading Standards issued two enforcement notices requiring Manufacturer X to change its advice.
- After initially lodging an appeal against the wording of the new advice, Manufacturer X complied and advised that until repaired, the product should not be used

Once consumers engaged with this incident, they pointed out a range of concerns they now had about the role of manufacturers and whether they could ‘trust’ them. For instance, some pointed out that while they do trust their chosen brands to provide ‘good quality products,’ they had concerns that they may prioritise brand reputation over genuine consumer safety issues. Similarly, workshop participants pointed out that brands may provide consumers with guidance on how to use a product safely without yet knowing the outcomes of an investigation. In fact, several consumers spoken to as part of this research had received such guidance while their products were under investigation. In these instances, consumers described how at the time of receiving this guidance they felt ‘relieved’ that the manufacturer had said they would be able to keep using their appliance (tumble dryer) if they ‘cleaned it’ correctly. For these consumers, this suggested that the appliance was in fact safe and the manufacturer’s decision to investigate was either to find ‘faulty products’ within the batch or to be ‘extra cautious.’ After reading about the safety incident above, namely that some appliances had caught fire, these consumers became concerned that they had unknowingly been using an unsafe product.

‘The recall letter I received about my tumble dryer wasn’t even a recall. It said I could keep using it if I cleaned it properly and I thought, well I do always clean it, so it should be fine. It sort of reassured me that there was nothing really wrong with it.’
- Female, 32, recently bought a washing machine

Building on this concern about the actions and behaviour of individual manufacturers, consumers also felt that responsibility for ensuring safety was overly distributed. In the case of the safety incident above, this included a concern that the level and weight of government authority may be restricted by voluntary standards and local authorities may not be able to thoroughly oversee investigations as a result. Some consumers also pointed out that their own local authorities appeared to be experiencing financial and resourcing difficulties and therefore their ability to adequately investigate a nation-wide safety issue would be limited. Of particular concern for some was the ability of their local authority to investigate a ‘large-scale manufacturer’ or ‘big brand’ and effectively communicate progress and information at a national level.

'I know my local authority is really struggling at the moment. I can't see how they would be able to take on such a big business and win.'
- Male, 64

3.4 The role of government in setting and upholding safety requirements

In addition to these concerns, consumers pointed out that within the safety incident presented to them in the deliberative workshop, it appeared to be a consumer group who was campaigning on behalf of the consumer. Consumers were surprised and disappointed that government did not appear to be insisting on a judicial review and publicly supporting the issuing of an enforcement notice on the manufacturer. Consumers felt that the role of government was to provide an overall leadership role in setting and upholding safety standards, yet this did not appear to the be case in practice. This was in direct contrast to their initial perception, which is that government was providing leadership over the entire regulatory system.

'It feels like government are leaving it up to businesses to do the right thing, I'd expect them to be doing more to make sure we're safe.'
- *Female, 52*

For some consumers in the deliberative workshops, the relationship between government and businesses was a contentious issue - with some questioning the likelihood that the government would forcefully regulate the market or that brands would take notice of voluntary standards. Others recognised that they would be more likely to view brands favourably if they were seen to be actively collaborating with government to ensure the safety of consumers. For them, the relative attractiveness of brands was not just about the quality of their products but also the ways in which they were visibly concerned about their customer base.

'I would look more favourably on a brand if they looked as if they were taking my safety really seriously. Otherwise it looks like they're trying to avoid responsibility.'
- *Female, 32*

4. Segmenting consumer attitudes to product safety

Chapter summary

Segmentation analysis identified seven discrete groups who varied in their attitudes and stated behaviours in relation to product safety.

Across all the segments, most trusted that products in the UK are safe. As explored in the preceding chapter, safety was rarely a top of mind consideration. Even among the segments where likelihood to register products was highest, the motivation for registration tended to be related to activating or extending a warranty.

Two segments (*aware and organised* and *latest quality*), which represented 38% of the population, were the most likely to register their products. These segments were most likely to prioritise quality over cost, and to buy from well-known retailers because they trust them to deal with any problems should they arise.

Three segments (*busy families*, *buy to last* and *second hand shoppers*), which represented 33% of the population in total, were less likely to register. These segments tended to be more cost conscious. *Second hand shoppers* were among the least trusting of the product safety system and the actors that operate within it.

Quick to replace (15% of the population) were high frequency purchasers but were among the least likely to register their products. This segment was younger, containing the greatest proportion of people working full time and students of all the segments. They were also most likely to be living in privately rented accommodation.

The *less connected* (14% of the population) were very likely to read and follow instructions but were the least likely to register products. This is likely to be a consequence of their lack of awareness of the need to register. This segment has one of the oldest age profiles and was least likely to have access to the internet.

4.1 Developing the segmentation

As part of the quantitative analysis, a segmentation was developed to better understand how attitudes, and stated behaviours in relation to product safety, varied across adults in the UK. It will help to inform how consumers will respond to different interventions and how messaging can be more effectively targeted. The segmentation was developed by clustering consumers by their attitudes and behaviours, rather than typical socio-economic characteristics.

Nineteen ‘golden questions’ were used to allocate respondents to segments and discriminant analysis was undertaken to identify the importance of different questions in explaining the segments. Many of these questions have been presented in the preceding chapters and cover both attitudes and behaviours. The ‘golden questions’ are listed in full in appendix B, along with further detail on the methodology.

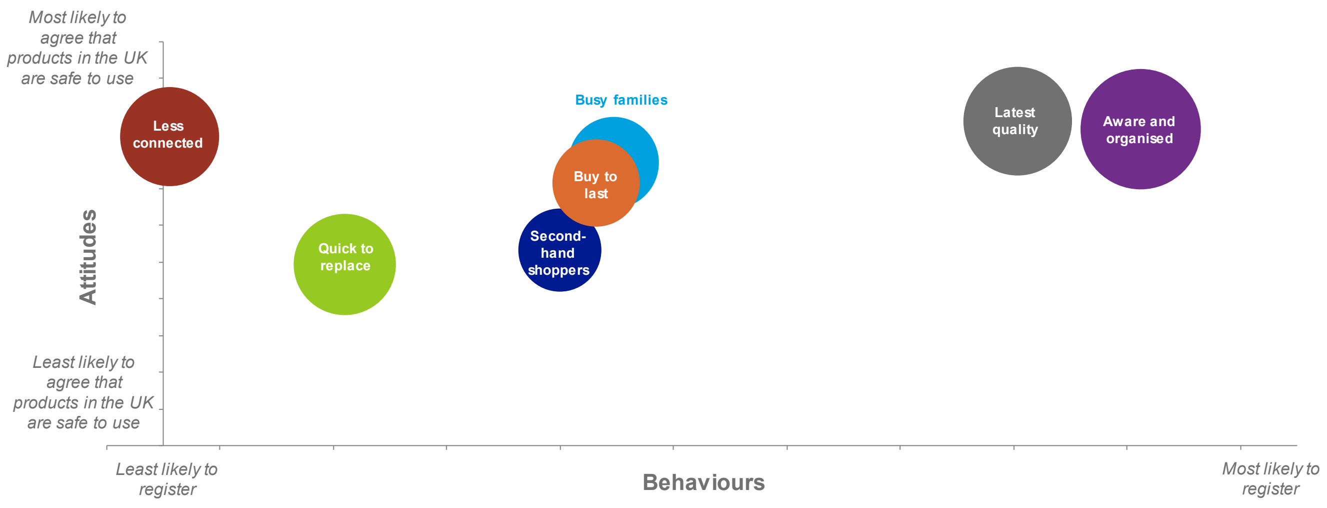
The final segmentation identified seven distinct groups. The segment names reflect the key characteristics of each group and were developed together with OPSS.

- Less connected (14%)
- Quick to replace (15%)
- Second hand shoppers (10%)
- Buy to last (11%)
- Busy families (12%)
- Latest quality (17%)
- Aware and organised (21%)

4.2 Introducing the segments

The segmentation analysis identified seven discrete groups who varied in their attitudes and stated behaviours in relation to product safety. Consumers in all segments were likely to agree that products in the UK were safe to use. The main differences were in their safety related behaviour, with the *less connected* being the least likely to register products, and *aware and organised* being the most likely to do so (figure 17). This section presents an overview of the seven segments, which are then discussed individually in more detail in section 4.3.

Figure 17: Attitudes against behaviours for the seven segments

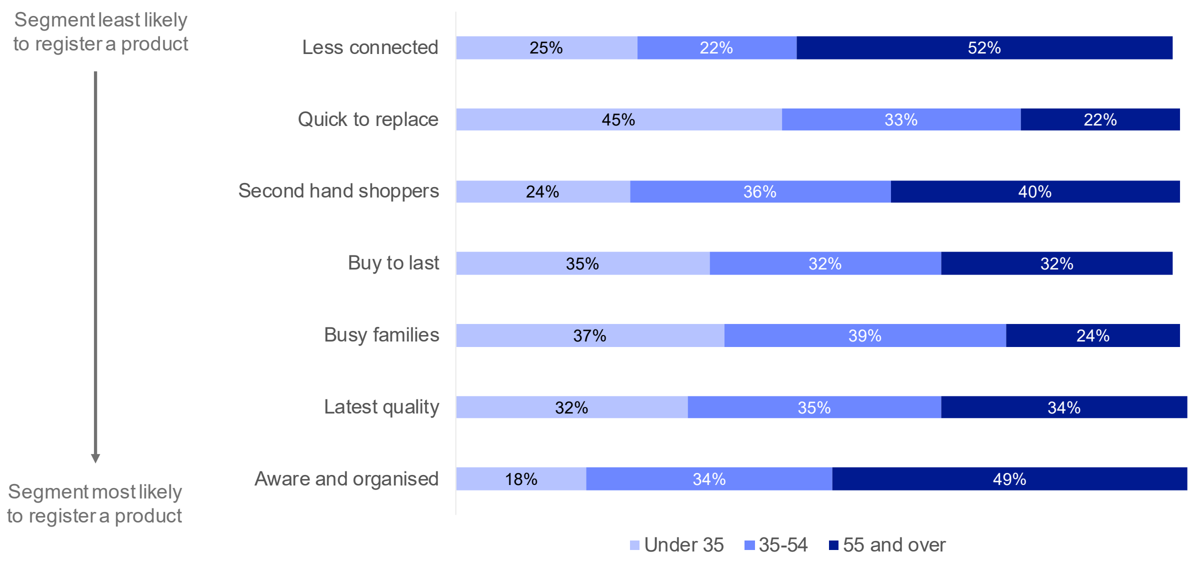


Demographic Characteristics

Across the seven segments there were some variations in demographic characteristics. The split between men and women tended to be even with the exception of *loected*, where there was a skew towards women (63%) compared to men (37%).

The age profile of the segments also varied, as demonstrated in figure 18. The oldest two segments were at opposite ends of scale regarding their likelihood to register. Fifty- two percent of those in the segment that were the least likely to register, *less connected*, were aged 55 or over, with 35% aged 65 or over. The proportions were similar in the segment most likely to register, *aware and organised*, with 49% aged 55 or over and 31% aged 65 or over. Perhaps reflecting the age profiles, those in *less connected* and *aware and organised* had the highest proportion of those who were retired (33% and 30% respectively). The youngest segments were *quick to replace,* with 45% aged under 35, and *busy families*, with 37% aged under 35. The *quick to replace* segment had the highest proportion of full-time workers (54%).

Figure 18: Age profiles for the seven segments



Q. Age. Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892) Base: all respondents (4256)

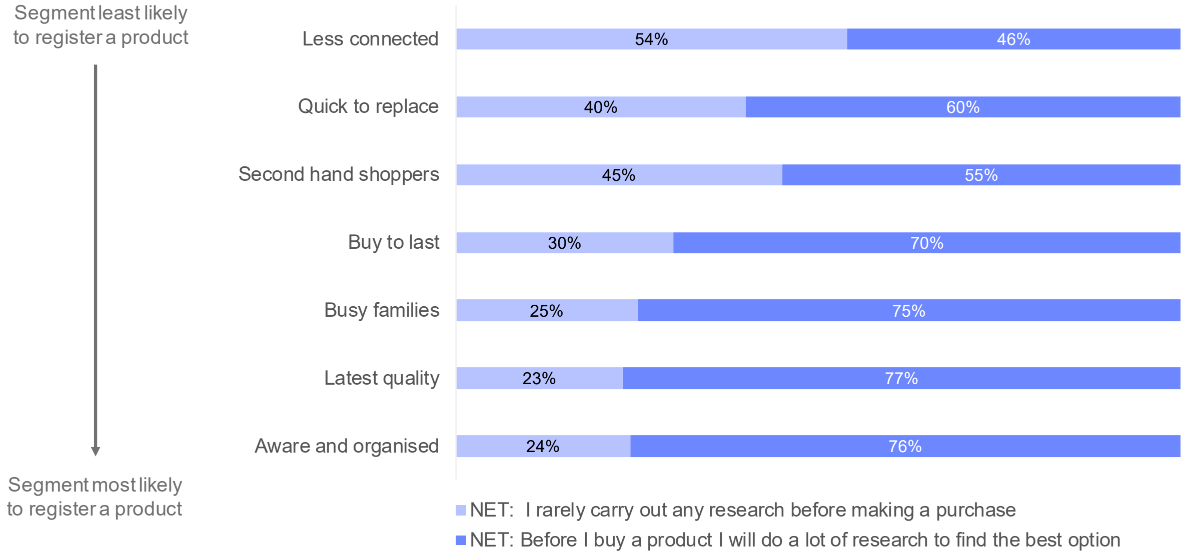
Aware and organised, the segment most likely to register a product, contained the largest proportion of homeowners (76%). *Quick to replace* contained the greatest proportion of those who rented privately (23%), and *second hand shoppers* the highest proportion who rented through a Local Authority (23%).

There was also some variation between the segments in terms of socio-economic grouping. *Second hand shoppers* and *less connected* had the largest proportion of those classified as DE (36% and 37% respectively). *Aware and organised* and *Busy families* contained the largest proportion of ABs (23% and 24% respectively).

Purchasing attitudes and behaviours

The segments where likelihood of registering a product was highest, *aware and organised* and *latest quality*, were also the most likely to say that before they buy a product they do a lot of research to find the best option (76% of *aware and organised*, 77% of *latest quality*). In contrast, *less connected* were the least likely to do a lot of research. (54% said they rarely carry out research before making a purchase (figure 19).

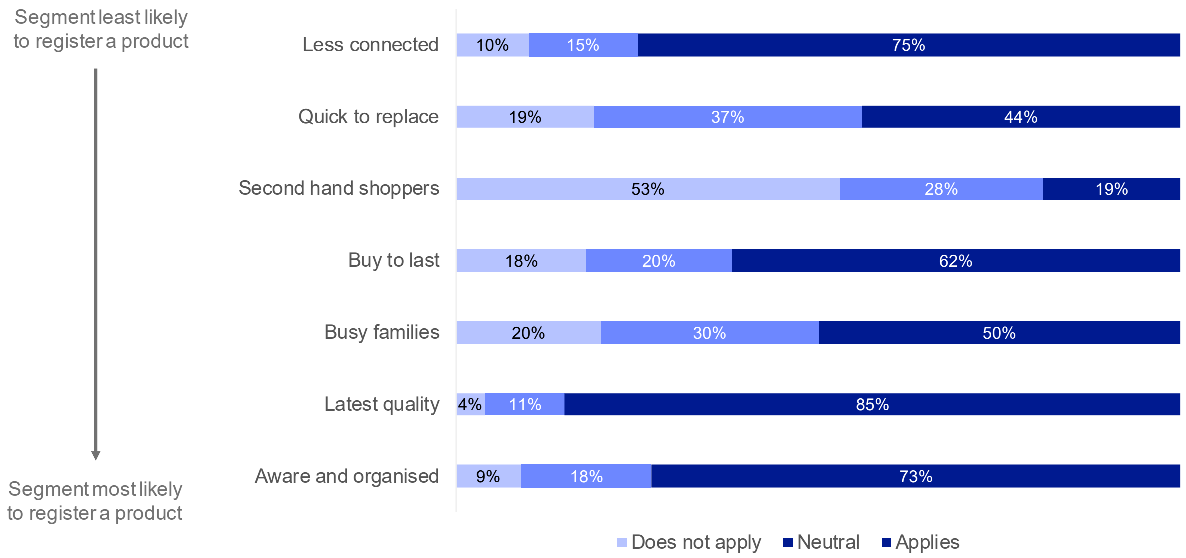
Figure 19: Likelihood to carry out research before making a purchase



Q. Please tell me where you feel you fit best between these two statements: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

The *latest quality* segment was the most likely to agree that they buy from well-known retailers because if there is a problem they will deal with it (85%, figure 20). Agreement rates were also high for *less connected* (75%) and *aware and organised* (73%). *Second hand shoppers* were the least likely to agree (19%).

Figure 20: Proportion agreeing that 'I always buy from well-known retailers because I know if there is a problem they will deal with it' applies to them

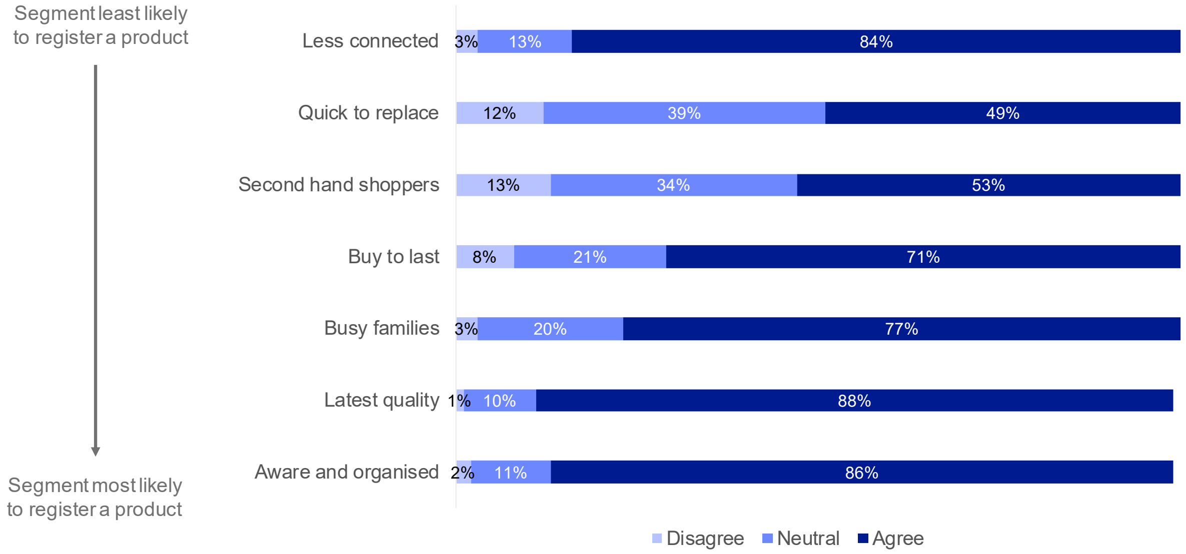


Q. To what extent would you say that the following statement applies to you: I always buy from well-known retailers because I know if there is a problem they will deal with it. Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

Second hand shoppers were also the most cost sensitive of the segments, 61% agreed that the statement 'cost is always the most important factor for me when making a purchase' applies to them. High rates of agreement with this statement were also found among the *latest quality* and *less connected* segments (54% and 53% respectively).

Across all of the segments, most agreed that UK products are generally safe as there are regulations in place to ensure this. Levels of agreement were the highest among *latest quality* (88%), *aware and organised* (86%), *and less connected* (84%). Two segments had notably lower levels of agreement; *second hand shoppers* (53%) and *quick to replace* (49%) however as figure 21 shows, generally this was due to greater levels of uncertainty, rather than disagreement with the statement.

Figure 21: Proportion agreeing that 'UK products are generally safe as there are regulations in place to ensure this'



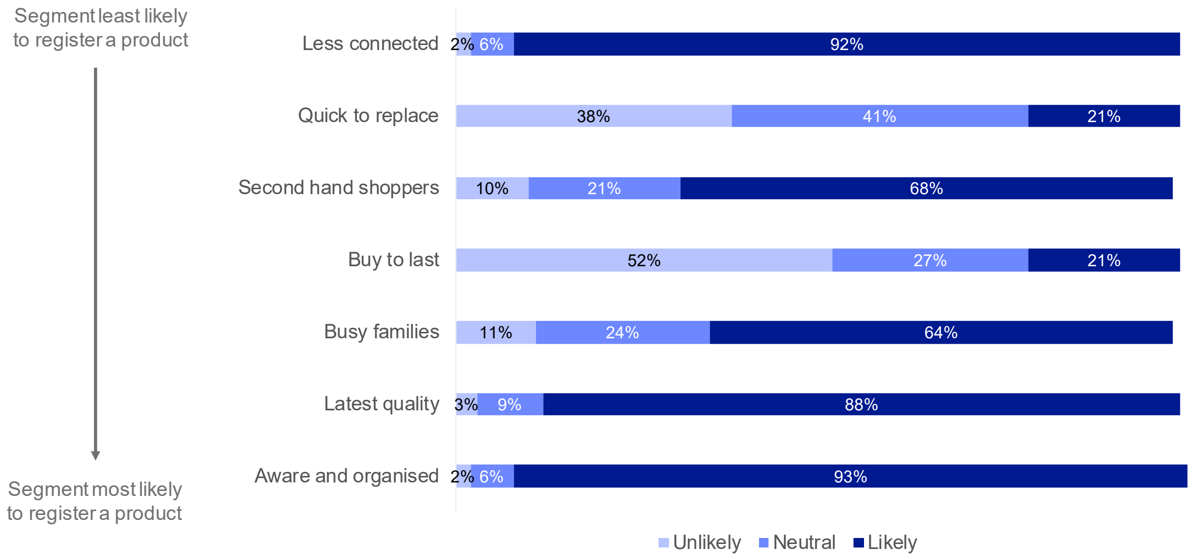
Q. To what extent do you agree or disagree with the following statements about product safety: UK products are generally safe as there are regulations in place to ensure this. Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

Post purchase behaviours

Consumers were asked how likely they would be to follow the instructions and guidance for safe use once they had purchased a product. The segments most likely to register a product had high levels of agreement; 93% of those in *aware and organised* and 88% of those in *latest quality* agreed that they would follow the instructions and guidance for safe use. The lowest rates of agreement were seen in *quick to replace* (21%) and *buy to last* (21%), two of the segments less likely to register.

High rates of agreement were also found amongst the *less connected* segment at 92%, despite the fact that this segment was the least likely to register a product. The survey results suggest that this apparent irregularity in behaviour – that the *less connected* will follow the instructions and guidance but not register their products – is due to a lack of awareness of registration, rather than a disregard for safety. Those in the *less connected* segment were the least likely to have registered the recent purchase they were asked about in the quantitative survey (82% had not registered, and 14% said it was not applicable). When asked why they had not registered 22% said they did not know they could, while 54% said they did want to or did not think it was necessary.

Figure 22: Likelihood to follow the instructions/guidance for safe use once a product has been purchased

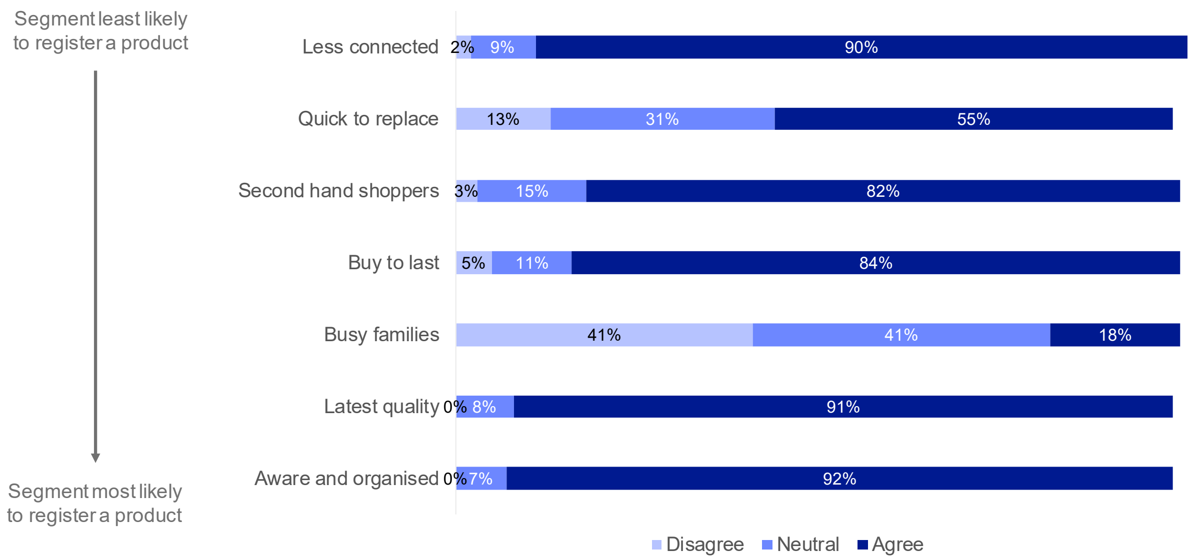


Q. Once you have bought something new, how likely is it that you will do the following: Follow the instructions/guidance for safe use. Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

Respondents were also asked how likely they would be to read the user instructions carefully before using a product for the first time. Once again, *aware and organised* (86%), *less connected* (86%) and *latest quality* (83%) were the segments most likely to carry out this behaviour, and *quick to replace* (17%) and *buy to last* (5%) were the least likely.

Again, *aware and organised* (92%), *latest quality* (91%) and *less connected* (90%) were the segments most likely to agree to the statement ‘it is my responsibility to ensure the products in my home are safe to use’. The segments least likely to agree were *quick to replace* (55%) and *busy families* (18%).

Figure 23: Proportion agreeing that ‘it is my responsibility to ensure the products in my home are safe to use’



Q. To what extent do you agree or disagree with the following statements about product safety... It is my responsibility to ensure the products in my home are safe to use. Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

Most trusted sources of information

Survey respondents were asked who they would trust most to provide them with information or advice on product safety; up to three answers were permitted. Across all the segments, manufacturers were the most trusted source of information. *Latest quality* had the highest proportion of those who trusted manufacturers (71%), followed by *aware and organised* (67%) and *busy families* (66%). *Quick to replace* had the lowest proportion who said they trusted manufacturers for information on product safety (53%).

Retailers were the second most frequently trusted source of information on product safety among all the segments, with the highest rates of trust seen within the *latest quality* (42%), *less connected* (41%) and *aware and organised* (40%) segments. *Second hand shoppers* were the segment least likely to trust retailers (29%). Friends and family were also commonly given as a trusted source of information, particularly among the *less connected* (24%), *quick to replace* (25%) and *second hand shoppers* (25%).

There was some variation between other sources of information and advice. *Buy to last* (15%) and *quick to replace* (15%) were the most likely to trust social media. The *less connected* segment was the most likely to say that they did not know who they would trust for information or advice on product safety (5%).

Table 1: Most trusted sources of information or advice on product safety *(showing top 7 overall and don't know)*

	Less connected	Quick to replace	Second hand shoppers	Buy to last	Busy families	Latest quality	Aware and organised
Manufacturers	61%	53%	55%	58%	66%	71%	67%
Retailers	41%	30%	29%	35%	35%	42%	40%
Friends / family	24%	25%	25%	24%	18%	19%	19%
The Government	18%	22%	15%	17%	22%	19%	17%
The media	14%	11%	15%	16%	18%	12%	15%
Charities / consumer groups	11%	9%	12%	8%	12%	11%	14%
Social media	8%	15%	10%	15%	10%	11%	8%
Don't know	5%	3%	4%	2%	2%	2%	2%

Q. Who would you trust the most to provide you with information or advice on product safety? (up to 3 answers permitted). Base: less connected (686), quick to replace (624), second hand shoppers (482), buy to last (409), busy families (463), latest quality (670), aware and organised (892)

4.3 Exploring the segments

4.3.1 Less connected (14% of the population)

The *less connected* segment was the least likely to register a product (1%).

Demographics: This segment was the oldest, with 52% aged 55 or older, and 35% aged over 65. The majority were female (63%) and homeowners (66%). Reflecting its older age profile, this segment contained the highest proportion of people who were retired (33%) and lived alone (26%). Twenty percent of people in this segment did not have access to the internet, the lowest internet penetration of all the segments. This segment had the largest proportion of those in the socio-economic group DE (37%).

Purchasing attitudes and behaviours: Typically, consumers in this segment kept products until they needed to be replaced (82%). They were the least likely to carry out research before making a purchase (54% rarely carried out research), but the majority (83%) bought from retailers they trusted to ensure products were safe.

Product safety: This segment was the least likely to register a product (1%), however they scored highly on other behaviours, such as keeping the instructions and information that comes with the product (84%) and reading the user instructions carefully before using it for the first time (85%). Ninety percent of this segment agreed that it was their responsibility to ensure the products in their home are safe to use, amongst the highest agreement rate of any segment.

When those in this segment were asked why they had not registered a product, they were among the most likely of all the segments to have said that they didn't know that they could (22%). A further 54% said they did not want to or did not think it was necessary.

Most trusted sources of information: Of all the segments, this group was the most likely to say they did not know who to trust for information on product safety (5%). The most trusted sources were manufacturers (61%) and retailers (41%).

Figure 24: Less connected profile

Less connected

Meet David

- Aged 71
- Retired mechanic
- Lives with wife outside Manchester
- Owns home
- Recently purchased an oven

Behaviours and attitudes:

- Rarely purchases new goods or products
- Purchases in-store and relies on customer assistant for recommendations
- Concerned about safety
- Never registered a product or aware of its purpose

“You have to be careful these days with things causing fires and children hurting themselves. You hear about some terrible things in the news”

4.3.2 Quick to replace (15% of the population)

This segment was the second least likely to register their products (16%).

Demographics: This segment was typically made up of young people, with 45% aged 16-34. Fifty-four percent were working full time, and seven percent were students. This segment was the most likely to be living in privately rented accommodation (23%), and the most likely to have 3 or more adults living in the household (32%).

Purchasing attitudes and behaviours: People in this segment liked having the most up-to-date products, 96% said it was important to them that the products in their home are new and up to date. Sixty percent preferred to shop online as it was quick and easy, the highest of all the segments. A smaller proportion than most other segments agreed that cost was always the most important factor when making a purchase (30%).

Product safety: consumers in this segment were unlikely to register a product (16%) and it was the segment least likely to have seen or heard about a product recall (54%). For those who had, this was most likely to have been on social media (23%). People in this segment were unlikely to keep instructions or information that comes with the product (57% unlikely) and rarely followed guidance for safe use (38% unlikely). This segment was less likely, than all but the *busy families* segment, to agree that it was their own responsibility to ensure product in their home are safe to use (56%).

Most trusted sources of information: This group, along with the segment *buy to last* were more likely, than other segments, to trust social media to provide them with information or advice on product safety (15%). In line with the other segments, manufacturers and retailers were the most trusted sources of information (53% and 30% respectively).

Figure 25: Quick to replace profile

Quick to replace

Meet Louise

- Aged 28
- Full-time communications executive
- Lives with husband
- Rents flat in Southampton
- Recently purchased a Sonos speaker

Behaviours and attitudes:

- Enjoys purchasing homeware and goods for new flat
- Tends to purchase online and read reviews
- Has never registered an appliance

“We’ve just moved into a new flat and my husband wanted new speakers. He’d heard about the Sonos so I had a look to see where I could get it delivered quickest from for the cheapest price.”

4.3.3 Second hand shoppers (10% of the population)

Thirty-five percent of this segment was likely to register a product.

Demographics: *Second hand shoppers* were typically older with 40% aged 55 or older. Twenty-four percent were retired and a further 12% were unemployed and not seeking work. Along with the *less connected*, this segment had the greatest proportion of those that fall into the socio-economic group DE (36%). Twenty-three percent of the segment rented from the local authority and 23% lived alone.

Purchasing attitudes and behaviours: Forty-six percent said that they often buy second hand as you can get better value for money - the largest proportion of all of the segments. Eighty-nine percent said that they agreed that once a product is in their home, they will keep it until they absolutely must replace it. This segment was cost conscious, with 61% saying that cost was the most important factor when making a purchase. Similarly, this group were the least likely of all the segments to say they would be willing to pay more for something if they thought that the quality will be better (33%).

Product safety: This segment was one of the least likely to register a product with the manufacturer with 35% saying they were likely to do so. Of those who had registered a recent purchase, 30% did so to get an extended warranty. *Second hand shoppers* do however agree it is their responsibility to ensure the products in their home are safe to use (82%).

Most trusted source of information: Of all the segments, *second-hand shoppers* were among the least trusting that manufacturers would contact them to warn them of a safety issue*:* 19% agreed that the manufacturer would get in touch if there was a problem with a product they had bought. This segment was more likely than others to trust other user reviews (6%) or previous owner reviews (6%) and among the least trusting of manufacturers (55%) and retailers (29%) as sources of information.

Figure 26: Second hand shopper profile

Second-hand shoppers

Meet Anne

- Aged 64
- Part-time sales assistant, currently off work due to ill-health
- Has four older children
- Lives in housing association flat in Glasgow
- Recently purchased a baby bouncer

Behaviours and attitudes:

- On a tight budget
- Buys a lot of goods second-hand – but likes to read online user reviews
- Does not register, but is concerned about manufacturers and government regulations

"You can't really trust anything. You don't know what's going on behind the scenes with these big companies, so there's no point worrying."

4.3.4 Buy to last (11% of the population)

Of this group, 38% were likely to register a product.

Demographics: The age profile of this segment was mixed, with 35% aged under 35, and 32% aged 55 or more. Seventy-one percent were in work, and a similar proportion were homeowners (69%).

Purchasing attitudes and behaviours: This group were willing to pay more for quality, but not for convenience: 82% said that they would be willing to pay more for something if they thought that the quality would be better. In contrast, just 28% said they would be willing to pay more for something if it meant they could get it straightaway. Thirty-nine percent said that cost was not the most important factor for them when making a purchase. This group tended to buy well-known brands, rather than buying cheaper brands or overly premium brands: 62% said they always buy from well-known retailers.

Product safety: This segment had the highest proportion (93%) who said that they would store the receipt and warranty in a safe place once they've bought something new, however they were also the least likely to read the user instructions (5%) or follow instructions and guidance for safe use (21%). This being said, they agreed it was their responsibility to ensure the products in their home are safe to use (84%). Seventy-five percent recalled seeing or hearing about a product recall or other product safety warning, the highest among all the segments.

Most trusted source of information: This segment, along with *quick to replace,* was more likely to trust social media as a source of information on product safety (15%) compared to other segments.

Figure 27: Buy to last profile

Buy to last

Meet Rochelle

- Aged 34
- Estate agent
- Lives with son
- Owns home in South London
- Recently purchased fridge-freezer

Behaviours and attitudes:

- Always researches appliances before buying and reads reviews online
- Tends to always buy the same brands which are in a 'medium price bracket'
- Limited awareness of purpose for registration

"I always get a warranty, because you never know what might happen. I've only registered my fridge but that's because I want it to last."

4.3.5 Busy families (12% of the population)

Forty percent of those in the *busy families* segment were likely to register a product.

Demographics: This segment was more likely to have larger households, with 55% living in a household of three or more, and to have children (36%). They were more likely than other segments to live in London (17%) or the South East (17%). Sixty-six percent of people in this segment were working. This segment had one of the youngest age profiles, with 37% aged under 35 (including 18% aged under 24). Only *quick to replace* were younger.

Purchasing attitudes and behaviours: This segment was cost focussed, 25% often buying second hand and 72% agreed that once they've bought a product they tended to keep it for as long as possible. Fifty-four percent preferred to shop online as it was quick and easy.

Product safety: This segment was by far the least likely to feel responsible for product safety at home: 18% agreed it was their responsibility to ensure products in their home were safe to use. Most agreed that UK products were generally safe to use (77%).

Most trusted source of information: This group were more likely that the others to trust the media to provide them with information about product safety (18%).

Figure 28: Busy families profile

Busy families

Meet Rachel

- Aged 29
- Works part-time as a care assistant
- Has two young children
- First time property owner
- Recently purchased a pram

Behaviours and attitudes:

- On a 'very tight budget'
- Trusts regulations are in place, despite being sceptical about manufacturers
- Uses social media and online reviews
- Does not read safety instructions
- Never registered an appliance

"We did have a look at the pram on Youtube to see what it was like before we bought it"

4.3.6 Latest quality (17% of the population)

Seventy-five percent of the *latest quality* segment was likely to register a product.

Demographics: This segment contained a spread of ages. Sixty-six percent were in full or part time work, with a further 18% retired. Sixty-eight percent owned their own home and 35% had children in the household.

Purchasing attitudes and behaviours: This segment valued quality and convenience and was willing to pay more for both. Ninety percent were willing to pay more for quality, and 54% were willing to pay more if it meant they could get it straight away. Despite this, 54% said that cost was the most important factor when making a purchase. This group were the most likely to carry out a lot of research before making a purchase (77%) and most likely to say they buy from well-known retailers because if there is a problem they will deal with it (85%).

Product safety: This segment took product safety in the home seriously. Ninety-one percent agreed that they only buy from retailers they trust to ensure the products they sell are safe. Ninety-one percent also agreed that it is their own responsibility to ensure the products in their home are safe to use. Eighty-two percent read the user instructions carefully before using a product for the first time, and 89% followed instructions and guidance for safe use. This segment was the second most likely to register products, the primary reason given for registering a recent purchase (among those that had) was to validate a warranty (72%).

Most trusted source of information: Sixty-four percent agreed that the manufacturer would get in touch if there was a problem with a product they had bought – the highest level of agreement of any segment. This may be down to previous experience, as for those who had seen or heard about a product safety notice for a product they owned, over half said they had been contacted directly by the manufacturer (56%).

Figure 29: Latest quality profile

Latest quality

Meet Richard

- Aged 52
- Construction surveyor
- Lives with wife
- Owns home in Glasgow
- Recently purchased new kitchen appliances for son's new flat

Behaviours and attitudes:

- Enjoys purchasing new technology for himself
- Tends to buy from same retailers
- Has registered his appliances and on behalf of his son

"We've been sorting my son out in his new place. We've kitted him out with the appliances he'll need. We made sure we got a warranty and registered everything though, as we knew he wouldn't!"

4.3.7 Aware and organised (21% of the population)

Aware and organised, was the largest segment. It was also the segment that was most likely to register products (86%).

Demographics: This segment was older, with 48% aged 55 or more. This segment was the most likely to own their own home (76%). Thirty percent were retired.

Purchasing attitudes and behaviours: Most were willing to pay more for quality (87%) and carry out research before buying a product (76%). Seventy-one percent preferred to shop in store to see exactly what they were buying. Almost all (99%) said that once a product was in their home they tended to keep it unless it must be replaced. Seventy-three percent agreed that they always buy from well-known retailers because they know they will deal with any problems.

Product safety: This segment was most likely to register a product (86). Ninety-two percent agreed that it was their own responsibility to ensure the products in their home were safe to use. This was reflected in other behaviours. Nine in ten (90%) were likely to store the receipt and warranty in a safe place, and 92% said they were likely to follow instructions and guidance for safe use.

Most trusted source of information: This segment generally trusted government, manufacturers and retailers. Fifty-four percent agreed that the manufacturer would get in touch if there was a problem with a product they had bought. Fourteen percent said they would trust charities and consumer groups the most for information on product safety, more than any other segment.

Figure 30: Aware and organised profile

Aware and organised

Meet Derek

- Aged 72
- Retired engineer
- Lives with wife
- Owns home in Cheshire
- Recently purchased a vacuum cleaner

Behaviours and attitudes:

- Likes to 'invest' in appliances
- Always purchases same brand, and mainly in John Lewis so he can 'look at the goods'
- Keeps his instructions
- Habitually registers appliances,
- Subscribes to Which magazine

"I don't want to waste my money on something that's going to break. I know what brands are good quality as I used to be an engineer myself."

Conclusions

This research has identified a series of assumptions and beliefs which appear to be held consistently by UK consumers, although there is some variation in the extent to which these are held, and the way in which different consumers behave as a consequence.

Underlying the attitudes and behaviours observed, was an implicit trust that products available to buy in the UK will be safe to use. Despite having a limited knowledge of how products are regulated, consumers believed that the system would protect them effectively. This view was based on a number of different assumptions: that safety regulation is effective, that the self-interest of manufacturers and retailers - who would not risk reputational or financial damage - would result in thorough checks and processes that guarantee safety, and that sensible usage behaviours would minimise safety risks.

These assumptions allowed consumers to largely ignore product safety. It was rarely considered at the point of purchase, or afterwards, with the exception of baby products. These items were considered to present the strongest risk to others because they would be used directly by children and infants who are more vulnerable. Other household items were categorised as posing less risk because safety was almost universally viewed in the context of how an item would be used. Consumers assumed that if a product was used correctly or sensibly it would be safe. Consumers acknowledged seeing and hearing about safety issues and product recalls, but they tended to be dismissed as one-offs or instances of misuse by the owner.

Consumer disengagement from product safety is at the heart of low response to recalls and safety warnings. This is compounded by the fact that few consumers habitually register their products, limiting the extent to which product owners can be contacted directly with safety or recall information. This research identified a clear lack of awareness of the purpose of registration. It was rarely associated with product safety. Those consumers that had registered items had done so to validate or extend a warranty. Those that were not motivated by a warranty were unaware of further benefits of registering, and so had chosen not to. Similarly, faults with products were viewed as inconvenient and possibly expensive – rather than potential safety risks.

Changing attitudes and behaviours in relation to registration, to facilitate more effective recalls, will require a significant shift in the perception that the system will protect consumers regardless of their engagement with it. While the segments identified as part of this research varied in their behaviours around product safety, and their attitudes to various actors, all held the view that the regulation would ensure products in the UK are safe. Despite the fact that two segments, *aware and connected* and *latest quality*, were very likely to register their products, in both cases products were registered as a means to access the benefits of a warranty.

Consumer behaviour in relation to registration demonstrates that the benefit to the individual must be made clear if behaviours are to be changed. For those consumers that were not motivated by the warranty and were unlikely to register their products, emphasising the safety benefits whilst reassuring them that the process is simple and will not result in burdensome communications from the manufacturer and retailer, could increase their willingness to register.

Appendix A – further details on methodology and sample

Qualitative methods

Overview

Qualitative research was divided into two stages: an initial stage of Accompanied Shops, conducted in November-December 2018; and a second stage of Deliberative Workshops, conducted in January-February 2019. The design was iterative, with findings from the Accompanied Shops feeding into the design of the Deliberative Workshops and informing the Quantitative Survey design.

Accompanied shops

We conducted a series of 36 x 75 minute accompanied shops with participants across England, Wales and Scotland who had purchased from one of the following categories within the last month: large domestic appliances, other electrical goods, cosmetics, toys and baby products. The interviews were split evenly across those who had purchased goods online or in store, and included a mixture of age, gender, ethnicity and housing tenure (see Table 1 below)

Accompanied shops were used to explore individual views on safety within the context of a specific purchase journey. The actual online/offline store environment was used to prompt a discussion of potential safety cues (such as packaging, labelling and brand) that would be difficult to discuss out of context.

Sessions centred on a store visit relating to the actual purchase, with researchers meeting participants at a public location near to physical stores or at home for online purchases. Journey mapping was used to trace the purchase journey, followed by an in-store walk-through to explore key elements of the journey in detail. The store environment was also used as a prompt to discuss safety communications, referring to in-situ signage where possible. For home visits, participants were asked to recreate the online purchase journey and demonstrate post-purchase safety measures, such as the storage of documentation.

Table 1: Accompanied shops achieved sample

Accompanied Shops – achieved sample	
BUYING FORMAT	
Offline/ Instore	20
Online	16
PURCHASE	
1. Appliances (white goods)	9
2. Electrical appliances	8
3. Cosmetics	5

Accompanied Shops – achieved sample	
4. Toys	6
5. Baby products	8
CONDITION	
1. New	29
2. Previously Owned	6
SOCIAL GRADE	
1. ABC1	18
2. C2DE	18
AGE	
2. 18-34	11
3. 35-44	12
4. 45-54	9
5. 55-64	2
6. 65+	2
HOUSING TENURE	
1. Home Owner	5
2. Buying home with mortgage/loan	16
3. Shared Ownership	1
4. Private Renting	9
5 Council Renting	4
GENDER	
1. Male	12
2. Female	24
ETHNICITY	
1. White - British	30
3. Any other white background	1
4. Mixed - White & Black Caribbean	1
10. Black / Black British - Caribbean	1
13. Asian / Asian British - Indian	3

Discussion guide for accompanied shops

1. Introduction (3 minutes)

- **Warm up and introduction:**
  - Introduce moderator and Kantar Public
  - Research on behalf of BEIS (Department for Business Energy Industrial Strategy)
  - Aim of the discussion is to understand more about how you make decisions when shopping with a focus on one specific purchase you have recently made (Researcher to confirm what this was)
  - We are going to begin by discussing yourself and the product you recently bought before heading to a shop / going online to talk a bit more about how you went about purchasing the product
  - Interview length – 75 minutes
  - Research is voluntary / have right to withdraw at any time
  - Confidential and pseudonym
  - *Confirm consent and if applicable, permission to record*
  - *Confirm consent for photos / video and explain these will be shared with BEIS as part of the final outputs. Please use media release form to capture this.*
  - Any questions?

2. Participant background (5 mins)

- **About them**
  - Where they live
    - If meeting outside of home: type of accommodation they live in
  - Who they live with
  - Typical weekly routine
    - Best and worst parts of week
  - How they would describe themselves in three words
  - If they could make one dream purchase, what would it be and why

3. Product considerations (10 mins)

Note to researcher: please <u>do not</u> explicitly mention product safety as a starting point for discussion

We want to lead with the product they have recently bought, but please also ask about the range of other products in questions below. Note that not all products mentioned below will be applicable to each participant.

- **Purchasing priorities (7 mins)**
  - Explore main priorities when buying recently purchased product:
    - Prompt if necessary: value for money; brand preference; appearance/aesthetics; ethics; ease of use etc.
  - What do they look for to ensure their priorities will be met?
    - Probe: brand; price; labelling; packaging etc.
  - How do these priorities differ depending on the product type?
    - Probe in comparison to: Large appliances; electrical appliances; cosmetics; toys and baby products

- **Product risk and safety (3 mins)**

  - (If not mentioned) explore the extent to which product safety / risks associated with products are a consideration when purchasing their product
    - Probe: what, if any, key risks would they would be thinking about?
  - How would they know / trust whether a product is safe?
    - What would they be looking for?
  - How would this differ depending on the product type
    - Probe in comparison to: Large appliances; electrical appliances; cosmetics; toys and baby products

4. Journey (20 mins)

Note to researcher: we now want to focus in on the product they have recently bought. Please use blank paper provided to create purchase journey and build on throughout the interview with these key points in time highlighted:

- Initial prompt to purchase a product
- Decision-making process to purchase the particular product
- Product purchase
- If applicable, whether they had any issues / further contact regarding the product after purchase

Please use these points in time above, to aid discussion on the below. Please record the key channels and drivers of decision making involved at each point in the purchase journey. N.B. this will involve a combination of online and offline activity and influences:

- **Initial prompt to purchase**
  - Explore their key priorities before purchasing the product
    - Probe: what their needs were at that point in time
  - How did they find out about the product?
    - Probe: advert; social media post; reviews; recommendation; etc.
  - Explore whether decision to purchase was spontaneous or was considered prior to entering shop / going online
  - Explore whether they did any research prior to purchase
    - Probe: what did they research / search for; where did they look for information; did they read any reviews or discuss with others
    - Explore balance of online vs. offline research
    - How did they trust this information was correct?

- **Decision making**
  - Did they consider purchasing any other products?
    - Why didn't they choose these?
  - Explore extent to which decision-making process for this product was similar to other products they might purchase
    - What kinds of products / why?
  - Did they have any concerns at this time?
    - What were these?
    - Did they discuss these? / Who with?

- **Purchasing process**
  - Where did they purchase the product?

        - e.g. in-store / online; first / second hand; what particular store
    - Why did they decide to buy from that store/channel?
    - (If not already mentioned) Why did they decide to buy that product?
        - Probe: did any other products catch their attention?
    - Did they speak to a sales person during this process?
        - What did they ask / what was discussed?

- **Post-purchase**
    - How have things been with the product?
    - Did they use it immediately?
    - How long do they expect it to last?
    - Any issues / concerns?
        - Who would they/who have they contacted about these?
        - (If applicable) what happened?
    - Would they be likely to buy it again?
        - Why/why not?

Researcher: then go back over key points in journey and ask the following:

- **Product risk and safety**
    - At what points, if any, did they think about the risks associated with the product?
        - Probe: what risks, if any, were they thinking about?
    - Were they given any further information about the product?
        - Probe: warranty; how to use manual; care instructions; safety instructions etc.
        - Did they read any of these?
        - Why / why not?
    - What would they do if they felt the product wasn't safe?
        - Who would they contact?
        - Why would they contact them?
    - (If applicable) Have they registered the product?
        - Why / why not?
        - How did they know to register the product?
        - Where did they register it?

5. In-store / online journey (25 mins)

Researcher: Please ask the participant to take you through their journey to buying the product. The intention is to both understand their experience of purchasing the product, as well as to watch and listen to how the participant moves through the store / navigates the website. Please use the information gathered from the previous sections as prompts for discussion.

Please also use the immediate environment to prompt discussion by pointing out other products / signs and link these to the information they have previously shared and questions below. Please also remember that the decision to purchase a product will include a combination of both online and offline influencers, so please probe around both channels.

If comfortable, please also take photographs of the participant within the shop environment / online.

- What were the key things they were looking for when purchasing their product?

- What caught their immediate attention in the store / online?
  - Probe: signs; labels; packaging etc.
  - Probe: balance of online vs. offline influencers
- Why did they choose this product over others which were available?
  - Probe: cost; quality; brand; convenience; habit
- What was it about other products that were less appealing?
- To what extent did they not trust the other products would meet their priorities?
  - Why did they think this?

Product Safety:

- Did they notice any information about product safety?
  - Can they point out where this was? / Show us online?
- Would they consider some products safer than others?
  - Why? / What is about that product?
  - Probe: brand; cost; provenance; appearance etc.
  - Explore extent to which the retailer / how they found out about the product influences how safe they think products are
    - Probe: influence of social media / reviews etc.
- Did they notice any information about product recall?
  - Can they point out where this was? / Show us online?

If conducting interview in-home / online:

Researcher: ask participant to search for https://productrecall.campaign.gov.uk/

- Would they be likely to use this site?
  - Why / why not?
- What information would they be looking for?
- How do they think it could be improved to encourage use?

Researcher: ask participant to show you their recently purchased product

- How do they maintain their product?
- (If applicable) can they point out any stamps / symbols / kite marks?
  - What do they think these symbolise?
- Can they point out any issues / concerns?

6. Reflecting on experience (10 mins)

- **Reflecting on product safety**
  - Explore what they think about product safety having completed the interview
  - Do they think differently about safety when shopping for other types of product from the one they purchased?
    - Why is this?
    - What concerns would they have about the different types of product?

- **Reflecting on product safety system**
  - How safe do they feel when purchasing products?

    - What concerns do they have about product safety?
    - What steps would they take if they didn't think their product was safe?
    - Whose responsibility do they think is it to ensure product safety?
    - Who would they trust most to communicate messages about product safety?

Researcher note: please use the final few minutes as an opportunity to take a vox-pop video of participants response to the question:

- How would you summarise in a couple of sentences what you think about in terms of product safety when purchasing products?

7. Close (2 mins)

- **Thank you and close**
    - Reminder of incentive (£60)
    - GDPR leaflet
    - Media release form

Deliberative workshops

We held a series of 12 x three-hour deliberative-style group discussions across England, Scotland, Wales and N. Ireland. Groups were segmented by life stage and made up of 8-9 participants, all responsible for household purchasing decisions. Two groups were recruited via free-find recruitment partners to lack digital confidence, defined as those who felt they lacked the confidence to use social media, price comparison sites or online banking. Within the overall sample, we included a mix of gender, ethnicity and housing tenure.

The workshops were designed to validate and deepen insight into how consumers conceptualise product safety across categories and their perceptions of the product safety system. Materials were created to illustrate the current product safety system and the role of different actors within it, to prompt discussion. Groups ended with a co-creation exercise to brainstorm potential improvements to the system.

Table 2: Deliberative Workshop sample

Group	Location	Seg	Life Stage
1	England S	ABC1	Pre-Family
2	England S	C2DE	Empty-nesters / 55+ (Low digital confidence)
3	England M	ABC1	Empty-nesters / 55+
4	England M	C2DE	Family
5	England N	ABC1	Family

Group	Location	Seg	Life Stage
6	England N	C2DE	Pre-Family
7	Scotland	ABC1	Empty-nesters / 55+
8	Scotland	C2DE	Pre-Family
9	Wales	ABC1	Family
10	Wales	C2DE	Empty-nesters / 55+
11	NI	ABC1	Pre-Family
12	NI	C2DE	Family (Low digital confidence)

Deliberative workshop research materials

Topic Guide

Key Questions	Stim	Approx. Timing
1. Welcome and Introduction – 6.00pm		**8 mins**

1.1 Introduction
• Welcome from KP
• KP to introduce
  • Intro to KP and BEIS (Department for Business Energy & Industrial Strategy)
  • Purpose of the dialogue
  • Discussion ground rules
  • Aims of the research
  • Brief over view of session agenda
  • Housekeeping (fire exits; toilets etc.)
  • Ground rules; no right or wrong, important to hear from everyone, one conversation a time, share and respect different views
  • Research is confidential and voluntary – your personal details will not affect future relationship with BEIS
  • We may have representatives from BEIS (Office for Product Safety); Organisation for Economic Co-operation and Development (OECD)
  • Permission for recording
		2 mins

Key Questions	Stim	Approx. Timing
1.2 Introduction to participants • Name • Who they live with, type of property they live in (e.g. owned / rental) • If they work what do they do • Last product they bought (focus on electrical; white-goods; cosmetics; toys and baby products) • How would they describe a good quality product **Moderator:** Throughout all of the following activities please note down any key points which are discussed or deliberated within break-out groups. This will support analysis about the types of issues people spontaneously raise / discuss. Throughout ask participants to give examples from their own products and experiences.		6 mins
2. Attitudes and awareness towards product safety		**1 hour 10**

2.1 Attitudes towards safety across product categories (40 mins)
 	
Moderator: Split participants into two groups, hand out 'product category photo cards.' Give groups 5 minutes to complete this activity.
 	
Moderator explain: *'We want you to rank these different product categories in terms of which of these you would consider more or less safe for consumers to buy, use or consume.'*
 	
Moderator: Feedback for 10 minutes. Note down how participants have ranked the categories.
 	
• How have they ranked the categories
  o Reasons for this
  o Could you rank these differently? (Moderator: gauge for extent to which participants focus on safe use vs. other factors)
 	
Moderator: Hand out 'product category worksheets.' Give groups 10 minutes to complete this activity.
 	
Moderator explain: *'I now want you to write the names of the products across the top of your sheet, from less to more risky. Please then write down the safety risks you would consider when buying, using or consuming these products.'*
 	
Moderator: Feedback as group for 15 minutes. Please ensure conversation is cross-category, but you may use one specific category as a way into conversation.
	Stim 1: Product category photo-cards
	
	Stim 2: Product
		5 mins
		
		10 mins

<table>
<tr><th>Key Questions</th><th>Stim</th><th>Approx. Timing</th></tr>
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- What safety risks have they written under [if necessary, choose a category to lead with]?
  - Reasons for this
  - Do these risks appear in other categories?
  - What kinds of safety concerns come up in other categories?
  - Why are these similar/different?
  - Why are some risks prioritised / appear more frequently than others across the categories?

- At what points in time do these safety risks present more of a risk to the consumer?
  - Who do they think is involved in mitigating against these risks?

2.2 Attitudes and behaviour towards safety within priority categories / across product life-span (30 minutes)

<u>2.2.1: Purchasing products (10 mins)</u>
Moderator: Ask participants to remove food; car; pharmaceutical photocards and focus on whitegoods, electricals, cosmetics, baby products and toy photocards.

Moderator explain: *'We are interested in understanding a bit more about how you make decisions when buying products from across these five product categories.*

I want you think about what you consider, look or search for, to let you know that the product won't present any risks. An example could be, buying from a retailer you know and trust. I'd like you to think generally across the five priority categories.'

Moderator: Discuss as group. Write down key points on flipchart.

- What do the remaining cards have in common?
- What do they consider / look for to let them know products present no risk to them?
  - Reasons for this
- Are these common across product categories?
  - If there are differences across product categories, where do they differ?
  - Reasons for this

- Would purchasing new or second hand impact on how risky they would consider the product to buy?
  - Reasons for this
  - Does this differ depending on the product category? Why?
- Would purchasing online what they would be looking for?
  - Probe: seller reviews etc.
  - Does this differ depending on the product category? Why?

</td><td>Category Worksheets</td><td>10 mins

15 mins

10 mins</td></tr>
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<tr><th>Key Questions</th><th>Stim</th><th>Approx. Timing</th></tr>
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<u>2.2.2: Using products (10 mins)</u>
Moderator explain: 'I want to focus on the experience of using your products and how you would know and ensure your products are <u>safe to use.</u> Please think generally.
Moderator: Discuss as a group.

How would they know their products are safe to use?

How would they know if there was anything unsafe about their product / what would signify this to them?
Do they do anything as consumers to ensure their product is safe to use?
What would make that product unsafe to use? (Probe: types of behaviour / actions of consumer which might impact on safety)

How does this compare across categories?

Which product categories do they think they have more / less control over in terms of ensuring the products are safe to use? Why?
Across the product categories, whose responsibility is it to ensure these products are used safely?

Who has a warranty for their products? (hands up)

Which product categories do they have a warranty for?
What is the purpose of a warranty?
Was this a priority for them on purchase? Why/why not?

Who has registered their white goods or electrical products? (hands up)

What products have they registered?
When did they register their product and why?
What is the purpose of registering?
How does this differ from a warranty?
(For those who haven't) why haven't they?

<u>2.2.3: Issues with products (10 mins)</u>
Moderator explain: I now want you to think about a situation where your products do not appear to be working properly or there is an issue.
Example of issue could include: cosmetics product causing a skin irritation; a baby high-chair becoming unstable and an electrical device sparking.
Moderator: Discuss as a group.

If there was an issue with their products what would they do? / steps they would take?

How would they know if the issue was a safety risk?
Does this differ depending on the product category?

</td><td>Stim 1: Product category photo-cards</td><td></td></tr>
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<tr><th>Key Questions</th><th>Stim</th><th>Approx. Timing</th></tr>
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Do they have any experiences of an unsafe product?

What happened?
Who did they contact / were contacted by?
What happened as a result?
Has this changed their approach to product safety since?
In what ways?

Do they have any experiences of, or have heard of a product being recalled?

If experienced, what happened?
Who did they contact / were contacted by?
What happened as a result?
Has this changed their approach to product safety since?
If not experienced, what do they know about product recall?
How do they think it works in practice?
Who is involved?

</td><td></td><td></td></tr>
<tr><td>3. Current understanding of the product safety system</td><td></td><td>30 mins</td></tr>
<tr><td>
3.1. Spontaneous awareness of effectiveness of system / safety incidents (5 mins)

From their current understanding, is the system of ensuring product safety clear; working well?

Why do they think this?
Are they aware of any issues with the system? What are these?
Are they aware of any product safety incidents?
From their current understanding – what happened with these incidents?
Where did they hear about this?

3.2. Spontaneous understanding of system (5 mins)
Moderator explain: ‘I now want to understand a bit more about what you know about the product safety system; who you think is involved and what roles and responsibilities you expect them to take. Again, please focus on the four product categories we have been focusing on.’
Moderator: Discuss as a group. Use insights from above discussion (e.g. key actors already mentioned) as probes and note down any key actors mentioned.

Spontaneous: Who do they think is currently involved in ensuring product safety?

What do they think they do?
What do you think the role of these different actors is?

If they mention an actor e.g. ‘Government’ probe as to who exactly they think is (such as national/local/international)

Why do they think this?

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</table>

Key Questions	Stim	Approx. Timing
○ Where did they find out about the different roles? **3.3. Understanding across different areas of system (20 mins)** **Moderator:** Split group into two groups. Hand out product safety system worksheet. When feeding back go through area of product safety (making safe products; ensuring safety at point of sale and after; ensuring correct use and enforcement/corrective action) at a time. Give participants 10 minutes to complete. **Moderator explain:** *'Using the sheets provided, I now want you to note down who you expect to be involved and the roles / responsibilities would expect them take within the five areas outlined on your sheets.* **Moderator:** Write actors below on flip-chart and pin on wall **Moderator:** Present back their maps for 10 minutes. • How did they find the exercise? ○ Were there areas which they felt more / less clear about? ○ What role / responsibilities do they expect different actors to take? ○ What role / responsibilities do they expect consumers to take? ○ Who do they think should have overall responsibility? ○ Having done the exercise do they have any concerns with the system?	**Stim 3:** Product Safety System Worksheet	
5 minute active comfort break		**5 mins**
Moderator to ask participants to get a tea / coffee, toilet break etc.		

4. Introduction to system and potential optimisation		**65 mins**
4.1 Top-of-mind reactions to actual system (10 mins) **Moderator:** Hand out product safety system map. Give participants a couple of minutes to read / engage with it.	**Stim 4:** Product Safety System Map	

4. Introduction to system and potential optimisation		65 mins
Moderator explain: *I want to you have a look at the map I just handed out. This is a map of how the product safety system actually works and the role of different actors and the areas they are responsible for. Please spend a couple of minutes looking at it, before feeding back your thoughts.* • Spontaneous reactions • Anything surprising / stands out? **4.2 Reactions to system (20 mins)** **Moderator:** Discuss below questions as a group. When feeding back ask about the system as a whole before probing <u>into specific areas of product safety.</u> Throughout the discussion probe on whether the actors involved are as expected, and whether are any issues / concerns / questions within each of these areas. **Moderator explain:** *Looking across the four areas of product safety, I now want to understand a bit more about your reactions to the system and whether it raises any questions.* • What are your views on this system as a whole? o Does this meet your expectations? o Does this differ from what you expected? If so how? o Are there any specific roles or responsibilities which are different to what you expected? At what points / area within system? o Probe on key actors listed o Is there anyone missing? o Does this raise any immediate concerns for you as a consumer? o Is there anything that doesn't make sense? / Is not clear? • Focusing on product registration, is it clear how this works? o Are the roles and responsibilities as expected / clear? o Why/why not? o Are they clear what they would need to do as a consumer? o <u>Repeat questions for process for product recall</u> **Moderator:** If unsure what registration is, explain that '*manufacturers may identify problems with an appliance once the product has been in use for some time. However, it can be difficult to trace customers as they often do not provide contact details when they buy a product. By registering products, it provides manufactures with these contact details.'* If unsure what a product recall is, explain that '*A recall is a corrective action, or a series of corrective actions such as repair, replacement or refund, undertaken by businesses to address one or more safety risks in a consumer product that has been or is being supplied to consumers.'*		

4. Introduction to system and potential optimisation		65 mins
4.3. Reactions to handling of safety incident (10 mins) **Moderator explain:** *'I now want to get your thoughts on a product safety incident and how it was handled by those involved. I am going to hand you out a sheet which explains what happened.'* o What do they think about what happened? o Is the action what they expected? o What would they have expected to have been done differently? o Do they have any questions/concerns about the key actors involved? (Probe: role of Local Authority; consumer bodies and manufacturer) **4.4. Potential improvements (25 mins)** **Moderator explain:** *'Having seen how the system operates in practice, I'd now like to understand what improvements you would like to see as a result. Please note that making these improvements may not all be viable, but it is important we capture them.'* **Moderator:** Write down feedback on flipchart. Explain to participants these may not be possible in practice, but we are keen to gather their feedback. • Are there improvements they would like to see across the system as a whole? o What are these? o Reasons for this **Moderator:** Ask participants to return to their product safety system worksheet where they originally wrote down who they expected to be involved and the roles/responsibilities they expected them to take. Ask them to use map for comparison. **Moderator explain:** *'I now want to look back at the worksheet you filled out at the start of this section. I want you to think about specific ideas for optimising this system to ensure consumers are aware of or are more likely to consider product safety.'* • Focusing in on the role of consumers, how can they be made more aware of or engaged with their responsibility towards product safety? o What kinds of information should they be made aware of? o Ideas for how to go about this? / format this should be communicated? o Who should be involved in this? Probe: key actors • Focusing on product registration and recall o How would you improve this process for consumers? o What key information should consumers be made aware of? o At what points should this be / who should be involved in communicating this?	**Stim 5:** Safety incident hand-out	

4. Introduction to system and potential optimisation		65 mins
○ Probe: key actors ○ <u>Repeat questions for product recall</u> **Moderator explain:** *'I want to quickly gather your feedback on a potential new product which is aimed at improving the recall process…* ▪ *Vodafone has demonstrated a SIM card- based module which could allow manufacturers to deliver a message on the safety recall status of a product to the consumer via an LED light* ▪ *Green would indicate no known issues, amber a warning and need to call manufacturer and red a signal to discontinue use and contact the manufacturer immediately* ▪ *The module does not require any connectivity from, or with the consumer: no WiFi Bluetooth, nor any apps to operate. It will be connected to a nation-wide narrowband internet of things, as used for devices like temperature and water pressure sensors, and would only allow notifications to be delivered without knowing the actual location of the product it resides in. The module does not require any action by, or data relating to the consumer in order to activate or operate.* ▪ *It would, however, require the user to contact the manufacturer should the light status change from green to either amber or red, to receive notification of the corrective action required to return its status back to green.* ▪ *Corrective actions could vary from a small modification that needs to be carried out by the user or a qualified engineer to collection or return of the product in the event of a product recall.'* • Gather feedback on this idea ○ Spontaneous reaction ○ Would they be likely to use it? Why / why not? ○ Explore extent to which they think this would improve recall process **Moderator explain:** *'I want to quickly get your thoughts on the work currently being undertaken by Office for Product Safety to improve consumer awareness of and engagement with product safety. This is a digital one-stop shop, where members of the public can access up to date information about which products are currently being recalled or where there are safety concerns.'* • Gather feedback on this idea ○ Spontaneous reactions ○ Would they be likely to engage with this? Why/why not?	**Stim 3:** Product Safety System Worksheet AND **Stim 4:** Product Safety System Map	
4. Wrap up		**2 mins**

4. Introduction to system and potential optimisation		65 mins

4.1 Conclude
 	
• As a group, explore:
    o Key thoughts / ideas for how to raise consumer awareness of and engagement with product safety
    o Anything they found surprising
    o Anything to add to key questions / information needs
 	
4.2 Close session
 	
• Thank everyone for input
• Incentives £80/ GDPR forms		

Quantitative survey

Data collection

The product safety survey questions were included on the Kantar face-to-face omnibus – a multi-client survey which surveys a cross-section of c 2000 adults aged 16 and over each week. It uses a random location sampling approach to ensure a representative cross-section of adults is surveyed each wave.

A total of 4,256 interviews were conducted with respondents aged 16 or older in the UK. Fieldwork was conducted between March and April 2019 across two waves of the survey:

Each interviewer was equipped with a tablet computer which allow for high quality data collection with full verbatim responses when required.

The results were weighted at the analysis stage to be fully representative of adults in the UK. All results presented in this report are based on weighted data.

Sampling

In addition to conventional quota sampling Kantar Omnibus uses random location sampling. Specifically, a computerised sampling system is used to integrate the Postcode Address File (PAF) with the 2011 Census small area data at output area level. This enables replicated waves of multi-stage stratified samples to be drawn with accurate and up to date address selection using PPS methods (probability proportional to size). Quotas are managed to incorporate key characteristics; notably employment status, which is known to have a bearing on individuals' probabilities of being at home and so available for interview. To ensure a balanced sample of adults within the effective contacted addresses, quotas are set by gender and within this work status as well as presence of children. Additionally, interviewers work within rules that governed the distribution, spacing and timings of interviews. Within each sample point, only one interview is undertaken per household and a minimum of three households left between each successful interview. In general, sampling points all have the same quota set. However, there are two sets of quotas:

- London
- The rest of England excluding London

This difference is primarily because in general interviewers tend to achieve fewer interviews in London – so the quotas are set to account for this.

Weighting

Despite following the above quota plan we applied weighting for the following reasons:

- To ensure the data matched the ONS mid-year population estimates for 2017
- To reduce error. There are two main components to error: bias (how accurate the results are) and variance (linked to the size of the margins of error – the greater the variance, the larger the margins of error).

Table 3 shows the variables used to address any imbalances.

Table 3: Variables used to address imbalances

Demographic variable	Source for weighting targets
Age and gender	ONS Mid-Year Population Estimates 2017
Region	ONS Mid-Year Population Estimates 2017
Working status	ONS Annual Population Survey April 2017 - March 2018
Ethnicity[13]	ONS Annual Population Survey April 2017 - March 2018
Housing tenure	ONS Annual Population Survey April 2017 - March 2018
Household size	ONS Labour Force Survey April - June 2018
Presence of children aged under 16	ONS Labour Force Survey April - June 2018

The estimated weighting efficiency was 82%.

[13] Respondents that refused to answer the ethnicity question were assigned to “White” (the modal category) for the purpose of weighting.

Appendix B – further details on developing the segmentation

Segmenting consumers

The overall purpose of the segmentation was to identify how respondents' attitudes towards product safety and behaviour around registering products vary by segment, and to understand how they may respond differently to interventions. Furthermore, the segmentation allows us to prioritise which groups to target with different types of campaigns.

The final segmentation identified seven distinct groups.

The segment names were developed together with researchers from OPSS. They are intended to highlight a particularly defining characteristic of the consumers within the segment, to aid recall of the profiles. For instance, the *less connected* segment contained a greater proportion of people without internet access than any other, while the *busy families* segment over indexed on having children living in the household.

Allocation of respondents

To find the 'golden questions' crucial to allocating respondents to our segments, we undertook a discriminant analysis. Discriminant analysis identifies the order of importance of different variables in explaining the segments.

The variables chosen were questions that cover both attitudes and behaviours.

- QC1 - attitudes towards quality, convenience, cost & willingness to pay more when buying products (5-point scale)
- QC2 – bipolar questions about what buyers find important (e.g. research before buying products, keeping products vs. regularly updating, shopping online or in-store)
- QC3 – product safety related behaviours around reading/storing instructions and receipts, and registering with manufacturers (5-point scale)
- QC4 – questions about who respondents trust – manufacturers, retailers, government regulations (5-point scale)

We undertook initial analysis where we included the original 20 variables from section C in the questionnaire. This allowed us to see which of these variables are important in accurately allocating people into the seven segments. We found that 19 variables are important to predict the segments, shown in table 4.

Table 4: Golden questions for allocation of respondents

Rank	Question
1	C2B. 1 Once a product is in my home, I will keep it until I absolutely must replace it VS. 4 - It is important to me that the products in my home are new and up-to-date
2	Q.C3_3 Read the user instructions carefully before using it for the first time - Once you have bought something new, how likely is it that you will do the following:
3	Q.C3_5 Register it with the manufacturer where the option is available - Once you have bought something new, how likely is it that you will do the following:
4	Q.C3_2 Store the receipt and warranty in a safe place - Once you have bought something new, how likely is it that you will do the following:
5	Q.C4_3. It is my responsibility to ensure the products in my home are safe to use - To what extent do you agree or disagree with the following statements about product safety...
6	QC1_1. I am willing to pay more for something if I think that the quality will be better - To what extent would you say that the following statement applies to you:
7	Q.C3_4 Follow the instructions\guidance for safe use - Once you have bought something new, how likely is it that you will do the following:
8	Q.C4_2. I only buy from retailers I trust to ensure the products they sell are safe - To what extent do you agree or disagree with the following statements about product safety...
9	Q.C3_1 Keep the instructions and information that comes with the product - Once you have bought something new, how likely is it that you will do the following:
10	Q.C4_6. UK retailers would not risk their reputation by selling a product that could be unsafe - To what extent do you agree or disagree with the following statements about product
11	QC1_5. I often buy-second hand, as you can get better value for money - To what extent would you say that the following statement applies to you:
12	QC1_4. I always buy from well-known retailers because I know if there is a problem they will deal with it - To what extent would you say that the following statement applies to you
13	C2A. 1 - I rarely carry out any research before making a purchase VS. 4 - Before I buy a product I will do a lot of research to find the best option
14	Q.C4_4. UK products are generally safe as there are regulations in place to ensure this - To what extent do you agree or disagree with the following statements about product safety
15	QC1_3. Cost is always the most important factor for me when making a purchase - To what extent would you say that the following statement applies to you:

Rank	Question
16	C2C. 1 - I prefer to shop online as it is quick and easy vs. 4 - I prefer to shop in store so that I can see exactly what I am buying
17	Q.C4_1. If there was a problem with a product I had bought, the manufacturer would get in touch to let me know - To what extent do you agree or disagree with the following statemen
18	QC1_2. I am willing to pay more for something if it means I can get it straight away - To what extent would you say that the following statement applies to you:
19	Q.C4_5. If there is an issue with the safety of a product I buy, it will only affect me - To what extent do you agree or disagree with the following statements about product safety

The accuracy of the allocation increases as more questions are included in the analysis. We would recommend 12 or more to ensure higher accuracy of allocation across all the segments, particularly to *second hand shoppers*. Table 5 shows how accuracy increases as more questions are included.

Table 5: Accuracy of segment allocation

	Number of questions					
	6	**8**	**10**	**12**	**15**	**19**
Less connected	73.7	82.1	81.8	84.7	87.6	92.1
Quick to replace	77.8	81.2	87.8	89.9	91.4	93.1
Second hand shoppers	42.6	50.6	54.7	70.1	78.0	83.5
Buy to last	70.8	78.0	84.7	86.6	93.2	93.7
Busy families	64.4	67.8	75.4	75.6	80.4	84.7
Latest quality	86.3	89.4	90.6	90.9	92.8	93.7
Aware and organised	75.9	81.7	81.9	84.6	91.2	92.6
Overall	72.3	77.7	81.0	84.1	88.5	91.0

Appendix C – survey materials

Product Safety Questionnaire

Section A: Experience

A1. Ask all – multi-code

[Prompted. First 5 codes to remain at top of list, randomise order]

Which of the following have you purchased for yourself or your household to use in the last 3 months? This includes items bought new or second hand.

Please select all that apply.

Please do not include gifts for somebody outside of your household.

INTERVIEWER NOTE IF NECESSARY: Please do not include items that you bought on holiday or whilst overseas.

1. **Electrical appliances *e.g. laptop, toaster, hairdryer, lights, vacuum cleaner, electronic game***
2. **Baby products *e.g. baby car seat, cot, pushchairs, bedding, changing table***
3. **Toys *e.g. board game, action figure, building blocks***
4. **Cosmetics *e.g. hair dye, make up, shampoo, toothpaste***
5. **White goods *e.g. refrigerator, washing machine, oven***
6. Clothes / clothing accessories *e.g. shoes, sportswear, bags, jewellery*
7. Furniture / furnishings *e.g. sofa, bed, curtains, carpets*
8. Homeware (non-electrical) *e.g. crockery, wall decorations, towels*
9. Sports and leisure item(s) (not including clothes) *e.g. treadmill, bikes and accessories, musical instruments, books*
10. Have not made any purchases in the last 3 months DO NOT SHOW

A2. Ask if A1=10 – multi-code

Which of the following you have bought for yourself or your household most recently? This includes items bought new or second hand.

Please select all that apply.

Please do not include gifts for somebody outside of your household.

1. **Electrical appliances *e.g. laptop, toaster, hairdryer, lights, vacuum cleaner, electronic game***
2. **Baby products *e.g. baby car seat, cot, pushchairs, bedding, changing table***
3. **Toys e.g. board game, action figure, building blocks**
4. **Cosmetics *e.g. hair dye, make up, shampoo, toothpaste***
5. **White goods *e.g. refrigerator, washing machine, oven***
6. Clothes / clothing accessories *e.g. shoes, sportswear, bags, jewellery*
7. Furniture / furnishings *e.g. sofa, bed, curtains, carpets*
8. Homeware (non-electrical) *e.g. crockery, wall decorations, towels*

9. Sports and leisure item(s) (not including clothes) *e.g. treadmill, bikes and accessories, musical instruments, books*
10. None of the above / prefer not to say DO NOT SHOW [SKIP TO SECTION C]

Dummy variable here to identify which product the respondent is asked about in section B. If only one selected that will be used, where multiple products are selected will prioritise.

Section B: Behaviour – *specific to products purchased at section A*

Ask all who have made a purchase [A1=1-9 OR A2=1-9] - Single code

INTERVIEWER NOTE – ASK OR RECORD

B1. For the following questions please think about the {textfill from A1 OR A2} you purchased [in the last three months[14]] [recently[15]].

IF YOU HAVE PURCHASED MORE THAN ONE ITEM IN THIS CATEGORY: Please think about the product you purchased most recently.

What was this product?
[Prompted]

If A1 = 1 (Electrical appliances category)

1. Laptop / tablet/ mobile phone
2. Charger
3. Speakers / headphones
4. Small kitchen appliance (toaster, kettle, blender)
5. Electronic game / console
6. Vacuum cleaner
7. Other, specify

If A1 = 2 (Baby product category)

1. Pushchair
2. Cot
3. Car seat
4. Changing table
5. Baby carrier
6. Baby monitor
7. Other, specify

If A1 = 3 (Toys)

1. Baby toy
2. Sports toy
3. Board game
4. Doll / action figure
5. Construction toy
6. Building blocks

[14] If A1=1-9,
[15] If A2= 1-9

7. Other, specify

If A1 = 4 (Cosmetics category)

1. Make-up
2. Toothpaste
3. Moisturiser
4. Shampoo
5. Hair dye
6. Other, specify

If A1 = 5 (White goods category)

1. Refrigerator / freezer
2. Extractor
3. Washing machine / combined washer-dryer
4. Tumble dryer
5. Oven
6. Dishwasher
7. Other, specify

Ask all who have made a purchase [A1=1-9 OR A2=1-9] – single code
B2. Was this new or second hand?

1. Brand new (unopened, in original packaging)
2. New 'other' (unused, no signs of wear but may be missing original packaging or unsealed. Includes factory seconds or unused item with defect).
3. Second hand used

Ask all who have made a purchase [A1=1-9 OR A2=1-9] – single code
B3. And did you make this purchase online? (this includes 'click and collect' orders. This does not include products advertised online but paid for in person)

1. Yes
2. No

Ask all who have made a purchase [A1=1-9 OR A2=1-9] – single code
B4. Which of the following best describes where you purchased it from?

IF NOT ONLINE
[Prompted]
1. High street retailer
2. Discount retailer or outlet
3. Supermarket
4. Market stall or 'pop-up' shop
5. [if second hand] Directly from the previous owner
6. [if second hand] A nearly new sale
7. Directly from the manufacturer
8. Buying from someone who makes things at home
9. Other

IF ONLINE

[Prompted]

10. High street retailer (online)
11. Supermarket (online)
12. Online only retailer (e.g. Asos)
13. Online market place (e.g. Amazon, Ebay, Etsy)
14. Directly from manufacturer (online)
15. Other online retailer

Ask all who have made a purchase [A1=1-9 OR A2=1-9] - multicode
B5a. Which of the following did you take into account when you were considering buying the [insert product from B1]?
[Prompted]

Select all that apply

1. Purchase price
2. [ASK IF A1 = 1 OR 5] Running costs
3. Environmental impact
4. Style / fashion
5. Quality
6. Product safety
7. None of these

Ask all who have made a purchase [A1=1-9 OR A2=1-9] - multicode
B5B. And did you take into account any of the following when you were considering buying the [insert product from B1]?

Select all that apply

1. Brand name
2. The retailer or seller
3. Warranty / money back guarantee
4. Online user reviews
5. Reviews from independent consumer bodies (e.g. Which)
6. Recommendations from friends or family
7. Ease of purchase
8. Speed of delivery
9. None of these

Ask all who have made a purchase [A1=1-9 OR A2=1-9] – single code

B6. Which of these factors was the most important when you decided to make this purchase?
[Prompted]

Filter response codes selected at B5A and B5B

1. Upfront cost of product
2. Running costs
3. Environmental impact
4. Style / fashion
5. Quality
6. Brand name
7. The retailer or seller
8. Product safety
9. Warranty / money back guarantee
10. Online user reviews
11. Reviews from independent consumer bodies (e.g. Which)
12. Recommendations from friends or family
13. Ease of purchase
14. Speed of delivery

Filter only to those categories that you can register products *[if A1= Electrical appliances, Baby products, Toys, White goods, Furniture / furnishings]* – single code

B7. Did you register the [insert product from B1] when you bought it?

IF NECESSARY: 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

1. Yes
2. No
3. Not applicable
4. Don’t know

Ask all who registered their product IF B7 = YES (CODES 1,2) – multi-code
B8. Why did you register it?

1. To validate my warranty
2. To get an extended warranty
3. I had to register it in order to be able to use it
4. To ensure I receive all relevant information and updates
5. So that the manufacturer can let me know if there are any problems with the product
6. Proof of purchase
7. Other, please specify

Ask all who registered their product IF B7 = YES (CODES 1) – single code
B9. And how did you register it?

1. Phone
2. Post
3. App
4. In store
5. Online

- manufacturer's website
- retailer's website
- government website

6. Trade Association website

7. Other [specify]

Ask if haven't registered product and could have done so (B7 = 2) – single code
B10. Why didn't you register it?

1. I meant to but haven't got around to it yet
2. I tried to but I couldn't
3. I didn't know how to
4. I didn't know I could
5. I didn't want to or didn't think it was necessary
6. Not sure
7. Other

Ask if B10 = didn't want to (CODE 5) – multi-code
B11. Why did you not want to register this product?

1. I didn't want to share my details because I don't want to be sent marketing
2. I didn't want to share my details because I am worried about data security
3. I didn't need to because I already have a warranty for the product
4. I didn't need to be because the retailer already had my details
5. I did not see any benefit to registering
6. I did not want to spend my time on this
7. Other [specify]
8. Don't know

Ask if B10 = tried to but couldn't (code 2) – single code
B12. Why couldn't you register this product?

1. I could not find the website / phone number / address
2. I could not find/remember all required product details
3. Technical issues (e.g. issue with online form submission)
4. I ran out of time
5. Other [specify]
6. Don't know

Ask all who did not, or could not, register their product (HIDE IF B7 = 1) – single code
B13. Product registration involves providing your details and model details to the manufacturer when you buy a product. This is so that they could contact you if a safety issue was identified with your make/model of product
Have you ever registered a product before?

1. Yes

2. No

3. Not sure

Ask if registered product purchased recently, or if have ever registered (B7 OR B13 = 1)
B14. Would you say that registering the products you buy is something that you…?

1. Always do
2. Often do
3. Sometimes do
4. Never do

Section C: Attitudes towards product safety

Now we would like to ask you some questions about you and your attitudes towards purchasing and using products…

[If A1 is not code 12]

Please think about your attitude towards products in general, not just {textfill from A1}

Ask all – single code
C1. To what extent would you say that the following statements apply to you? Please use a scale of 1-5 where 1 means does not apply at all and 5 means strongly applies. Please use a scale of 1-5 where 1 means does not apply at all and 5 means strongly applies.

- 1 – does not apply at all
- 2
- 3
- 4
- 5 – strongly applies

[Randomise list order]

1. I am willing to pay more for something if I think that the quality will be better
2. I am willing to pay more for something if it means I can get it straight away
3. Cost is always the most important factor for me when making a purchase
4. I always buy from well-known retailers because I know if there is a problem they will deal with it
5. I often buy-second hand, as you can get better value for money

Ask all – do not randomise order – single code
C2. Please indicate where you feel you best fit between these two statements, please use the scale of 1-4.
[Prompted]

1 - Before I buy a product I will do a lot of research to find the best option

2 -

3 -

4 - I rarely carry out any research before making a purchase

1 - It is important to me that the products in my home are new and up-to-date

2 -

3 -

4 - Once a product is in my home, I will keep it until I absolutely must replace it

1 – I prefer to shop online as it is quick and easy

2-

3-

4- I prefer to shop in store so that I can see exactly what I am buying

Ask all – single code
C3. Once you have bought something new, how likely is it that you will do each of the following?
Please use a scale of 1-5 where 1 means it would be very unlikely and 5 means it would be very likely.

- 1 – very unlikely
- 2
- 3
- 4
- 5 – very likely

[Randomise list order]

1. Keep the instructions and information that comes with the product
2. Store the receipt and warranty in a safe place
3. Read the user instructions carefully before using it for the first time
4. Follow the instructions/guidance for safe use
5. Register it with the manufacturer where the option is available

Ask all – single code
C4. To what extent do you agree or disagree with the following statements about product safety?
Please use a scale of 1-5 where 1 means you do not agree at all and 5 means you strongly agree

- 1 – strongly disagree
- 2
- 3
- 4
- 5 – strongly agree

  [Randomise list order]

1. If there was a problem with a product I had bought, the manufacturer would get in touch to let me know
2. I only buy from retailers I trust to ensure the products they sell are safe
3. It is my responsibility to ensure the products in my home are safe to use
4. UK products are generally safe as there are regulations in place to ensure this
5. If there is an issue with the safety of a product I buy, it will only affect me
6. UK retailers would not risk their reputation by selling a product that could be unsafe
7. Safety issues are more likely to be caused by people misusing products, rather than an issue with the product itself

Section D: Product safety system

Ask all – single code
D1. Have you ever seen or heard about a product recall or other product safety warning? It does not have to be something you have purchased. Please exclude any food, pharmaceutical or vehicle product recalls.

IF NECESSARY: A product recall is a corrective action such as a repair, replacement or refund, undertaken by a business to address safety risks in a consumer product.

1. Yes
2. No

If D1 = yes – multi code
D2. Where did you see or hear about the product recall or product safety warning?

Select all that apply

1. Notification displayed in a public place e.g. in a shop
2. Contacted directly by seller (this could be by phone, letter, email)
3. Contacted directly by manufacturer
4. Friends / family
5. Social media
6. Media (e.g. TV, newspaper)

7. Other [specify]
8. Don't know [hidden]

If D1= yes – single code

D3. Have you ever seen a product recall notice, or other safety warning from a retailer or manufacturer, about <u>something you own</u>?

1. Yes
2. No

If D3=1 – multi code

D3a. Where did you see or hear about this product recall notice or safety warning?
IF NECESSARY: If experienced multiple product recall, please think of most recent product recall notice or safety warning

Select all that apply

1. Notification displayed in a public place e.g. in a shop
2. Contacted directly by seller (this could be by phone, letter, email)
3. Contacted directly by manufacturer
4. Friends / family
5. Social media
6. Media (e.g. TV, newspaper)
7. Other [specify]
8. Don't know [hidden]

If D3 = yes – multi code

D4. What type of product was it?
Select all that apply

[Prompted]

1. **Electrical appliances *e.g. laptop, toaster, hairdryer, lights, vacuum cleaner, electronic game***
2. **Baby products *e.g. baby car seat, cot, pushchairs, bedding, changing table***
3. **Toys *e.g. board game, action figure, building blocks***
4. **Cosmetics *e.g. hair dye, make up, shampoo, toothpaste***
5. **White goods *e.g. refrigerator, washing machine, oven***
6. Clothes and clothing accessories *e.g. shoes, sportswear, bags, jewellery*
7. Furniture / furnishings *e.g. sofa, bed, curtains, carpets*
8. Homeware (non-electric-al) *e.g. crockery, wall decorations, towels*
9. Sports and leisure (not including clothes) *e.g. treadmill, bikes and accessories, musical instruments, books*
10. Other

If D3 = yes – multi code
D5. Which of the following actions did you take?
Select all that apply

1. Returned the item
2. Threw it away or stopped using it but did not return
3. Followed manufacturers guidance for safe use
4. Tried to fix it myself
5. Allowed manufacturer to make modification
6. Other (specify)
7. Did not take any action

Ask all -single code
D7a. Have you ever personally experienced a safety issue or defect with a product? Please do not include vehicles, food and pharmaceuticals.

1. Yes
2. No
3. Not sure

If D7a=yes – multi code
D7b. Have any safety issues or defects you have experienced cause any of the following?
Select all that apply

1. Harm to the user
2. Damage to property or other household items
3. None of the above [EXCLUSIVE]

Ask if D7a = 1 yes [multicode]
D8. For what product did you experience a defect or safety issue?
[Prompted. First 5 codes to remain at top of list, randomise order]

INTERVIEWER NOTE: if experienced this same type of incident with several different items, please select most recent

1. **Electrical appliances *e.g. laptop, toaster, hairdryer, lights, vacuum cleaner, electronic game***
2. **Baby products *e.g. baby car seat, cot, pushchairs, bedding, changing table***
3. **Toys *e.g. board game, action figure, building blocks***
4. **Cosmetics *e.g. hair dye, make up, shampoo, toothpaste***
5. **White goods *e.g. refrigerator, washing machine, oven***
6. Clothes and clothing accessories *e.g. shoes, sportswear, bags, jewellery*
7. Furniture / furnishings *e.g. sofa, bed, curtains, carpets*
8. Homeware (non-electrical) *e.g. crockery, wall decorations, towels*
9. Sports and leisure (not including clothes) *e.g. treadmill, bikes and accessories, musical instruments, books*

Ask if experienced safety issue (Ask if D7a = 1)

D9. What action did you take following this experience of a safety issue or defect [select as many as apply].

1. Stopped using product
2. Returned product
3. Discarded product
4. Made adjustments to product or the way of using product to make it safer
5. Contacted retailer
6. Contacted manufacturer
7. Contacted consumer rights organisation (e.g. Citizens Advice)
8. Other action (specify)
9. Took no action

Ask all
D12. Information about product safety can be found from a range of sources. Who would you trust the most to provide you with information or advice on product safety? Please select up to three.
[Prompted]

1. Manufacturers
2. Retailers
3. Previous owner (if buying second hand)
4. The Government
5. Your local council
6. The media (newspapers, magazines, tv, radio)
7. Charities or consumer groups (e.g. Citizens Advice, Which?)
8. Friends / family
9. Social media
10. Other users' / owners' reviews on line
11. Other (specify)
12. Don't know [hidden]

Ask all – single code
D13. In your opinion who is most responsible for:

- Setting product safety requirements
- Ensuring that a product meets the legal safety requirements
- Ensuring a product is used safely
- Resolving product safety issues

[SINGLE CODE FOR EACH ROW] [Prompted]

1. Manufacturers
2. Retailers
3. Government
4. Charities / consumer groups
5. The user
6. Don't know [hidden]

If D13 = Government – single code for each row

D14. You said the government is most responsible. Is that:

1. The EU
2. National Government
3. Local Government

This publication is available from: www.gov.uk/government/publications/consumer-attitudes-to-product-safety