Department for
Business, Energy
& Industrial Strategy

Office for Product
Safety & Standards

OPSS Product Safety and Consumers Wave 1

April 2021

BEIS Research Paper

April 2021

Any enquiries regarding this publication should be sent to us at:
enquiries@beis.gov.uk

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- When defining safety, the public feel that products must be safe for all members of society, particularly those who are the most vulnerable e.g. children.
- Six in ten (58%) of the public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe - a previous experience buying a product is the most common factor in building trust that a product is safe (42%).
- Four in ten (37%) of the UK public agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself. Less than a fifth (18%) disagreed with this statement.
- The UK public are most likely to say that Government is most responsible for setting product safety requirements (46%). Manufacturers are seen as being responsible for ensuring that a product meets the legal safety requirements (57% thinking this) and to resolve any product safety issues (62%).

Perceptions of the Office for Product Safety and Standards

- One third (33%) of the UK public report that they have at least some knowledge on OPSS.
- Those who know about OPSS have strong levels of trust in the department, the majority (56%) think it is a trustworthy organisation, with close to one in ten (9%) stating that it is very trustworthy.
- Over half (53%) of those who know about OPSS report that its work is effective compared to only 10% who think it is not.

Experiences of Safety Issues

- Less than one in ten (8%) had a safety issue with a product that they purchased in the last 6 months.
- The most commonly reported impact is stress (22%), followed by physical harm (15%) and damage to property/ household items (12%).
- The majority of individuals take action when they experience a safety issue (75%), with returning the item for a refund/ exchange the most common result (21%).
- Individuals often wish to protect others from safety issues therefore feel a responsibility to report the issue however others felt a sense of apathy around reporting a perceived 'minor' issue.

- A quarter of those who did not take action say the safety issue was not important enough (27%), while a fifth did not think taking action would have made any difference (21%) or reported that the issue resolved itself (19%).
- Two-thirds said that, when they first experienced the safety issue, they thought it would be easy to deal with on their own (65%) and just over half thought it would be easy to get help (54%).

Perceptions and Experiences of Product Recalls

- The majority (58%) of the UK public are aware of seeing or hearing about a product recall or safety notice in the last two years.
- Of those who were aware of product recalls, one in ten (10%) had seen or heard one for a product they own.
- Generally, most of the UK public would like to be contacted directly for a product recall notice for something they own; six in ten (61%) would like to be contacted directly by the manufacturer and just over half would like to be contacted directly by a seller (54%).
- However, those who had seen or heard about a recall for a product they own most commonly reported that they had heard about it through the media (36%), while comparably, only a fifth (22%) had been contacted by the manufacturer.
- One third (32%) of those who had seen a recall for something they own report returning the item for a refund or exchange while a fifth allowed the manufacturer to make modifications (21%) or followed the manufacturer’s guidance for safe use (20%).

Perceptions and Experiences of Product Registration

- Three in ten individuals who purchase an eligible product register it (31%), with the most common reason for registering a product is to validate a warranty (73%). Two-fifths register their product so that the manufacturer can contact them in case of an issue (43%).
- Eligible products are not being registered because individuals do not know they can (37%) or because they do not think it is necessary (35%).
- Those that do not think registration is necessary either see no benefit to registration (43%) or think the risk of issues with their product is low (42%).
- Clearer guidance on how to register the product or what the benefits are would encourage people to register their products in the future (with 60% reporting that).
- Younger respondents are more likely than older respondents to specifically want clearer guidance on how to register a product (39% of 18 to 29 year olds compared with 30% of those aged 65+).

Background

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

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

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

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

Aims and objectives

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

Key objectives of this research include:

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

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

[1] OPSS (2018) Strengthening national capacity for product safety: Strategy 2018-2020 https://www.gov.uk/government/publications/strengthening-national-capacity-for-product-safety-strategy-2018-2020
[2] Ibid.
[3] OPSS (October 2020), Consumer attitudes to product safety. https://www.gov.uk/government/publications/consumer-attitudes-to-product-safety Accessed January 2021

This report presents the findings from the first wave of tracking, including insights on registration rates and awareness/ action on product recalls. The report also includes an exploration of key topical policy areas including online shopping, second hand shopping, and inclusive design.

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

Approach

The findings are based upon a large scale representative sample of 10,230 people from across the United Kingdom (UK) collected through online research methods. Fieldwork was carried out between the 17th and 30th November 2020. A supporting survey of 512 people who are very low or non-internet users was conducted via telephone between the 23rd November and 12th December 2020.

After the close of the online survey, two focus groups were conducted with survey participants. Groups were split according to whether participants had experienced issues with product safety in the past and explored their attitudes to safety, experiences with products, and views on regulation and OPSS.

Unless otherwise stated, figures and data presented are from the online survey. Where two or more groups are discussed, only statistically significant differences to the 95% confidence interval are mentioned. Significance testing is not applied for figures based on fewer than 50 respondents. Where included, figures based on fewer than 50 respondents are noted and should be treated with caution.

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

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

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

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

Perceptions of Safety

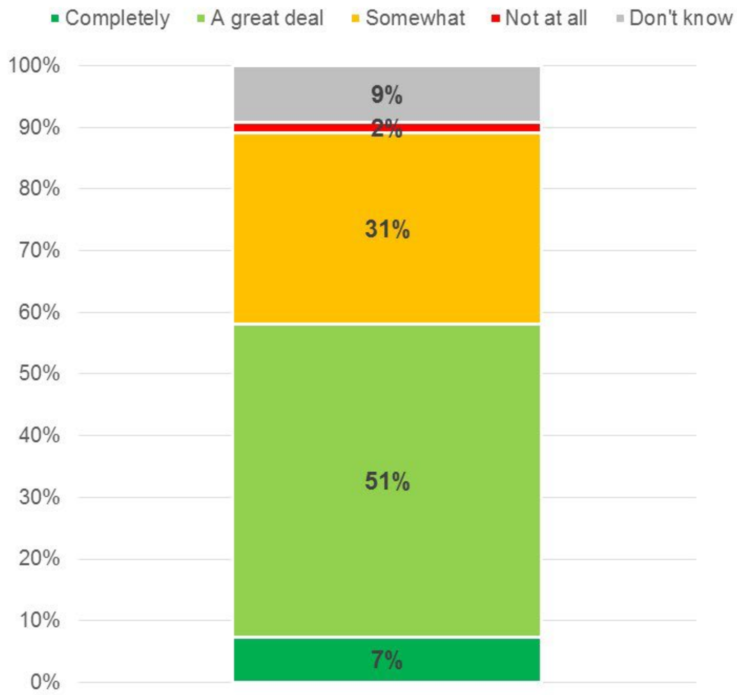
Key findings

- When defining safety, the public feel that products must be safe for all members of society, particularly those who are the most vulnerable e.g. children.
- Six in ten (58%) of the public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe.
- Perceptions of safety are often dependent on past experiences with products, individuals who have experienced product issues are more concerned about the safety of certain products, those without prior experience felt that standards have improved in recent years.
- A previous experience buying a product is the most commonly cited factor that builds trust that a product is safe (42%).
- One in ten people mentioned product safety as an important factor in product choice - the safety of the product ranks 10th out of 16 factors that were presented to people who had bought products recently.
- Three quarters (76%) of the UK public agree that products sold in the UK are generally safe as there are regulations in place to ensure that.
- Four in ten (37%) of the UK public agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself. Less than a fifth disagree with this statement (18%).
- The UK public are most likely to say that Government is most responsible for setting product safety requirements (46%). Manufacturers are seen as being responsible for ensuring that a product meets the legal safety requirements (57% thinking this) and to resolve any product safety issues (62%).
- Thinking about different stakeholders that operate in and around the product safety system, the UK public has strong levels of trust in consumer protection organisations, with eight in ten (79%) saying they consider them to be trustworthy in how they operate towards them personally.
- The lowest levels of trust are seen in UK government departments and local government. Although trust in UK Government departments' increases with age, with 43% of those aged 65+ considering UK government trustworthy compared with 30% of those aged 18-29 years old.

The UK system for regulating product safety

Six in ten (58%) of the UK public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe. Three in ten (31%) feel the product safety system only somewhat ensures that products are safe and a very small minority (2%) feel this system doesn't at all keep products safe. This sentiment is a consistent picture across the varying demographics of the UK public.

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



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

Offline adults are more likely than the general population to feel that the UK's system for regulating the safety of products COMPLETELY ensures that products purchased are safe – 25% stating that compared with 7%.

Factors that influence perceptions of safety and product purchasing

Key drivers of confidence in the regulatory system

The results presented below are the outputs of logistic regression models that aim to predict which demographic or contextual factors are most closely associated with the perception that the UK's system for regulating the safety of products ensures that products purchased are safe.

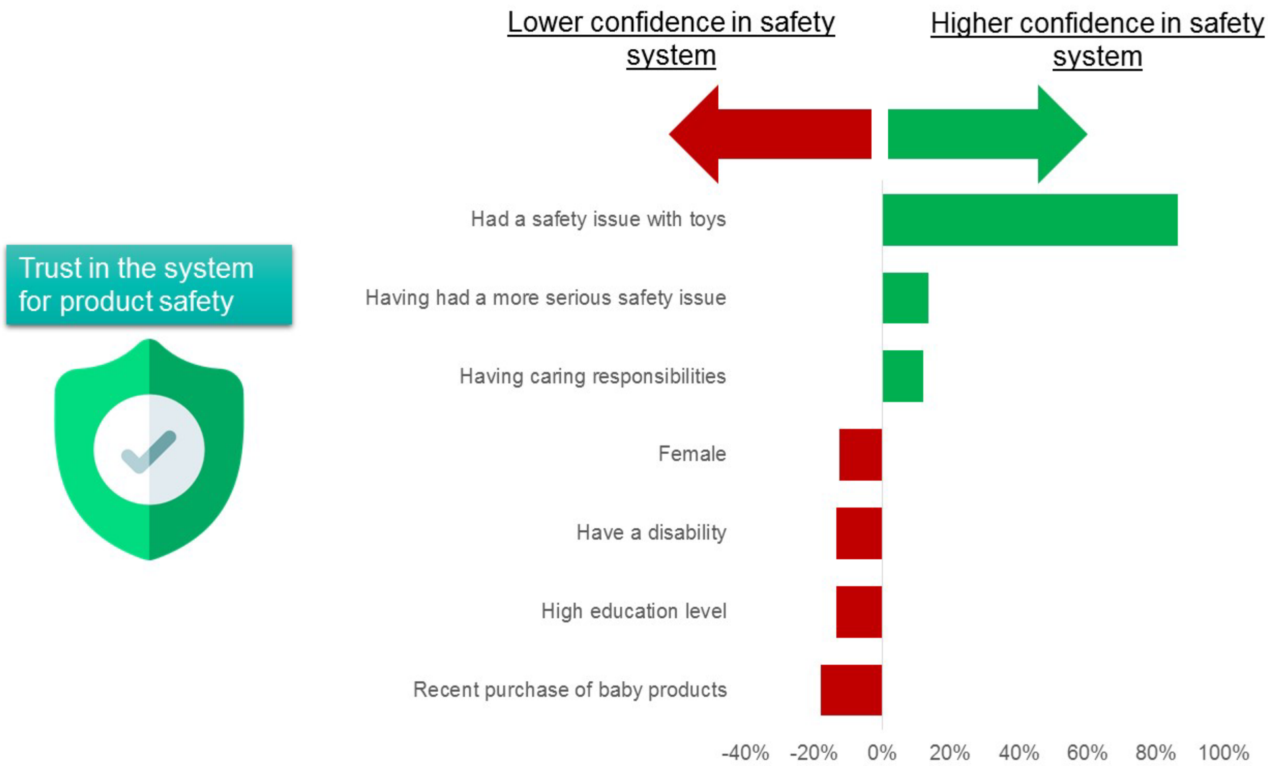
Including this multivariate analysis provides a more robust understanding of behaviour through looking at a number of variables at the same time, which isolates the effect of each factor after taking into account the simultaneous effects of other factors.

Figure two below shows the demographics and experiences which are most highly associated with higher or lower levels of confidence in the UK regulatory system. This shows that statistically having a previous experience of a safety issue with a toy results in higher predicted levels of confidence that the regulatory system ensures that products are safe.

We hypothesise that the reason for this is that a person having an experience of a safety issue and that being actioned and/ or resolved gives people greater confidence that the regulatory system works.

In contrast, the regression model predicts that an individuals' recent purchasing patterns is connected to their perceptions of the product safety system. Generally those people that have recently purchased baby products are likely to have lower levels of confidence in the regulatory system. As are women, people with a disability and those with a higher level of education than people in the opposite demographic groups.

Figure 2: The most important drivers of having higher or lower confidence that the UKs regulatory system keeps products safe



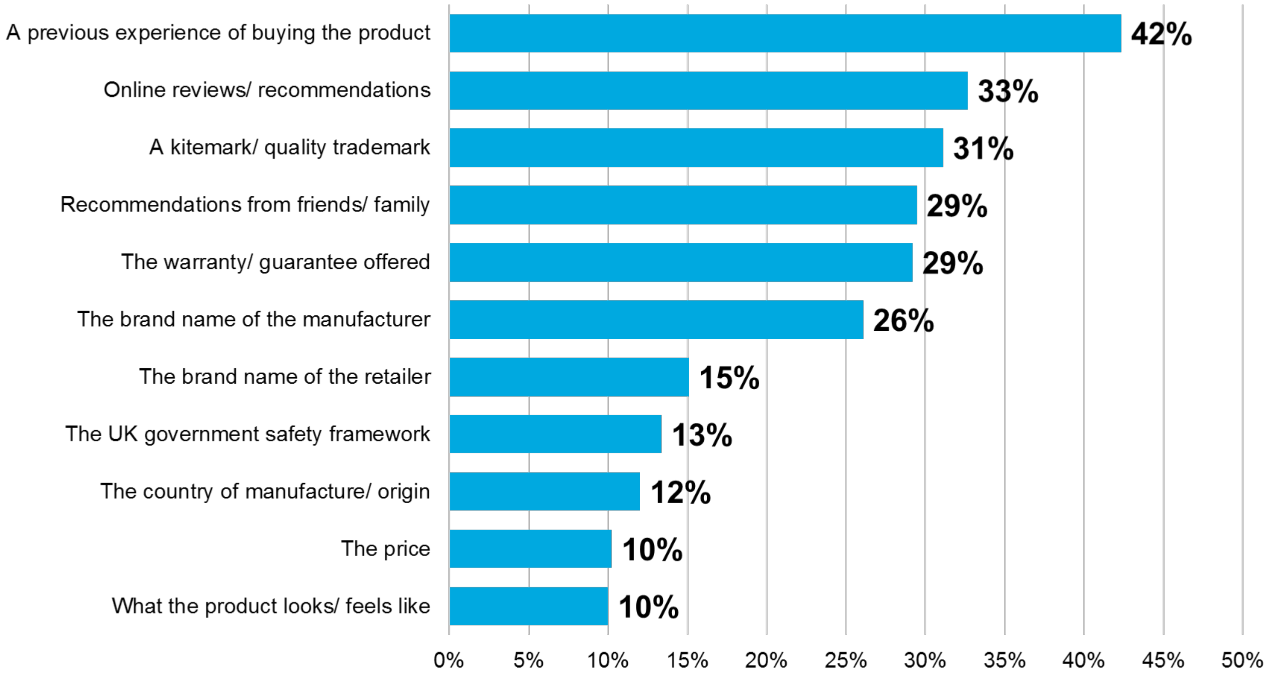
Base: All respondents in model (n=9,198)

Important factors in product choice and safety

A previous experience buying a product is the most commonly cited factor that builds trust that a product is safe (42%). Other factors such as online reviews (33%), quality marks (31%), recommendations from people they know (29%), the warranty (29%) and the brand name of the manufacturer (26%) are also important in building trust.

The price (10%) and what the product looks/ feels like (10%) are only influential factors in whether a product is safe for a small minority of the UK public.

Figure 3: Factors that most influence trust in a product being safe



Q: Which, if any, of the following most influence you having trust in a product being safe? (Please select up to three options)
Base: All respondents (n=10,230)

There are differences in what influences trust in product safety by different types of consumers. Older consumers aged 65 years and over are more likely than younger consumers (aged 18-29 years old) to be influenced by a quality mark (38% vs 16%), a previous experience (51% vs 37%) and the warranty (35% vs 21%). Whereas younger consumers (aged 18-34) are much more likely than those aged 55+ years of age to be influenced by online reviews (49% vs 19%) when considering product safety.

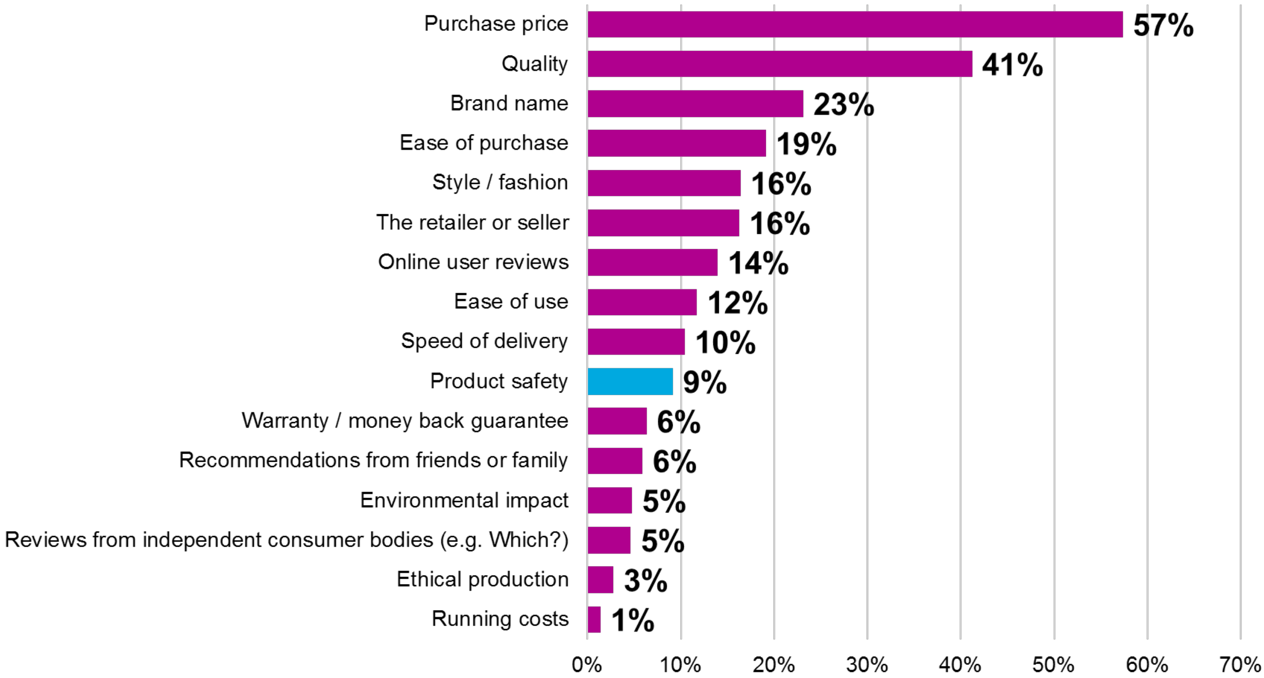
One in ten (9%) people mentioned product safety as an important factor taken into account when purchasing a product. Six in ten (57%) consumers say the price was important when purchasing a product and four in ten (41%) the quality of the product.

Participants in the qualitative research recalled the types of product safety standards that they trust, portable appliance testing (PAT) and kite marks were most commonly top of mind. Kite marks do not tend to be actively searched for, however they do offer reassurance when they are noticed by participants.

> *"Kite marks I would take to be a visual indicator that a given product has passed the relevant safety standards" (Has not experienced issues[4])*

[4] All quotations in this report are copied from the transcripts of the online focus groups. The text-based groups were split according to whether participants had experienced product safety issues, we also recruited a mix of age, genders, ethnicities and those with disabilities. Full transcripts of both groups can be shared upon request.

Figure 4: Factors taken into account when purchasing a product

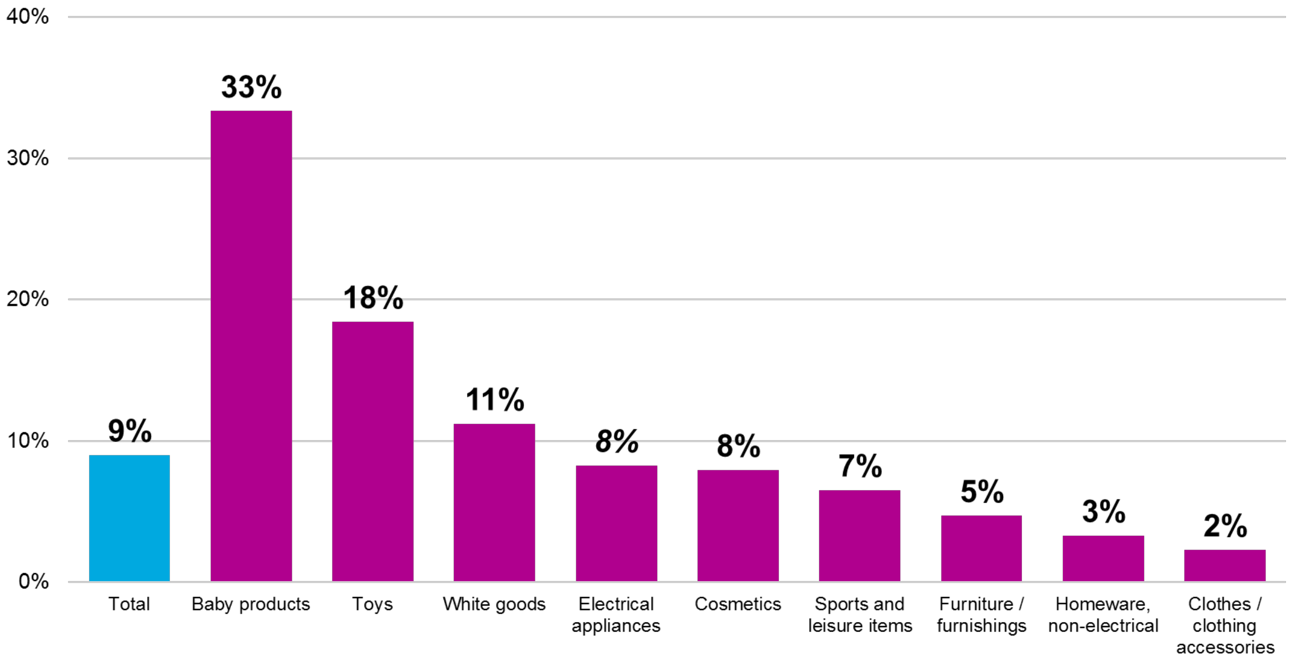


Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents (n=10,230)

When considering purchasing a product, the safety of the product ranks 10th out of 16 factors that were presented to people who had bought products recently.

There are no real differences across different types of consumer and the key distinguishing factor as to how important product safety is in purchase choice, is the type of product purchased. As Figure 5 shows, when purchasing baby products (33%) or toys (18%) the consideration of product safety is much higher than when purchasing other categories of products.

Figure 5: Importance of product safety in purchase choice by category of product purchased



Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents (n=10,230), product asked about: baby products (n=386), toys (n=943), white goods (n=674), electrical appliances (n=1,039), cosmetics (n=986), sports and leisure items (n=990), furniture/ furnishings (n=1,072), homeware (n=577), clothes/ clothing accessories (n=1,013)

For other product categories such as furniture/ furnishings (54%) and homeware, non-electrical goods (49%) the quality of the product is more important in the purchase choice. For cosmetic products the brand name (44%) is more important than when purchasing other categories of products.

Perceptions of safety

Contextualising perceptions of safety

The qualitative online focus groups explored how participants defined safety. Across both groups safety was not viewed as something which is individual, safety must be relevant to every member of society, particularly not causing harm to those who are the most vulnerable. Participants highlighted that adults have different safety requirements and some are in need of explanations around how certain products should be used. However children were felt to be the most disparate group when it comes to product safety needs, the potential for choking or other physical threats tends to be higher when it comes to children. Overall products should be designed with the most vulnerable in society in mind.

> *"Lots of thing[s] that are perceived to be safe to me may be more likely to cause harm to children. Such as choke risk on small items" (Has experienced issues)*

Perceptions of safety also depend on past experiences with products. Those who had not experienced safety issues were more likely to comment that products are inherently safer now, due to the increasingly stringent standards and tougher regulations placed on companies.

> *"I feel products are tested and safer now" (Has not experienced issues)*

Those who had previous experience of a safety issue were more concerned about product safety, there were multiple factors which contributed to this increased concern. Some were new parents who commented that they were more aware of potential harm since caring for a young child. Finally, they indicated that news stories about accidents has influenced their concerns around product safety, as well as the increased availability of products online from unknown sellers.

The qualitative research further explored how participants define hazards and risks. Overall hazards were felt to be something which are immediate and inherent in an object or situation, being more likely to have a physical impact. A risk tends to be something which is a potential hazard, but its impact depends on the individual and whether they take the risk, whereas a hazard is something which is innate.

> *"A risk is something you take or don't. A hazard is something that always exists" (Has experienced issues)*

Participants respected the idea of product safety and its role in protecting public health. Initial discussions of product safety centred on certain objects, for example children's toys, electrical objects as well as food.

> *"I think product regulation is important and makes a difference" (Has not experienced issues)*

> *"I feel regulation is of great importance and reassurance to customers, it does make a difference" (Has not experienced issues)*

> *"Very important, it is a way to ensure that we are not swamped with products that are fake, dangerous, bad quality or will cause us harm" (Has experienced issues)*

Perceptions of safety

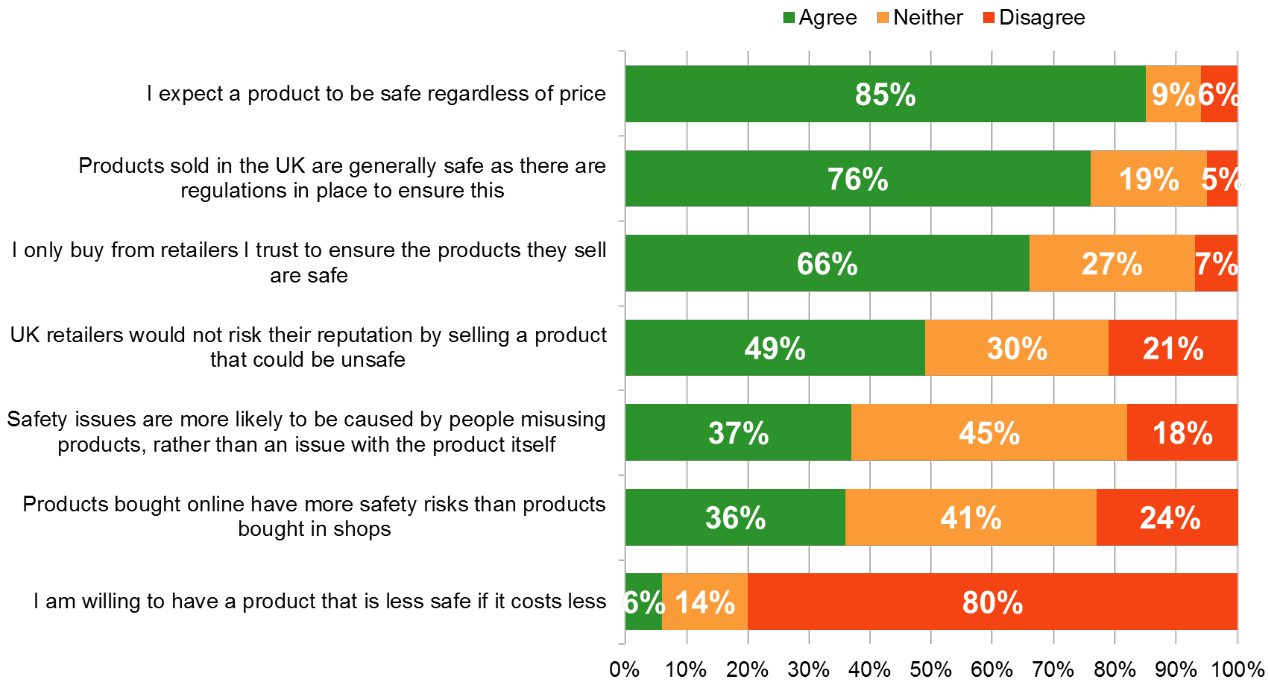
Nine out of ten (85%) of the UK public expect a product to be safe regardless of the price they pay for it. In a similar view, eight in ten (80%) of the UK public disagree that they are willing to have a product that is less safe if that product cost less than other products.

Three quarters (76%) of the UK public agree that products sold in the UK are generally safe as there are regulations in place to ensure that. With two-thirds (66%) of the UK public in agreement that they only buy from retailers they trust to ensure products are safe.

Younger people (aged 18-29 years old) are more likely to disagree that they buy products from retailers they trust to ensure products are safe, with one in ten (10%) disagreeing compared with 4% of those aged 65+. Younger people aged 18-29 are also more likely than older people (aged 65+) to agree that they are willing to have a product that is less safe if it costs less, with 13% in agreement compared to 2% of those aged 55+.

Four in ten (37%) of the UK public agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself. Men (43%) are more likely than women (32%) to agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself.

Figure 6: Levels of agreement with different aspects of product safety



Q: To what extent do you agree or disagree with the following statements?
Base: All respondents (n=10,230)

The offline population is more likely than the general population to agree that UK retailers would not risk their reputation by selling a product that could be unsafe (69%) and that safety issues are more likely to be caused by people misusing products, rather than an issue with the product itself (72%)

Participants in the qualitative research also take notice of the brand they are buying from. The reputation of a brand is felt to be an important indicator of the trust they have in a product, and the retailer which they purchased the product from has some impact. Participants take into account the service history they have with a certain brand as well as their transparency, reviews and recommendations.

> *"I would trust household/ well-known brands more as they tend to be more reliable" (Has experienced issues)*

> *"I always think that buying well-known brands ensures product safety" (Has not experienced issues)*

"Awareness, experience, experiences of others, how they have acted ethically and morally in the past - all these things make an organisation trustworthy" (Has experienced issues)

Established brands tend to be more trusted, whereas brands and products which feel new were felt to be more open to potential problems as they are less likely to have established checks and tests in place. A notable exception is "smart" products as most were not concerned about this as a new technology. Although participants were more concerned about how their data is stored and shared than for other products, this felt to be is a less tangible danger than the dangers of most other new electrical products.

Responsibilities for product safety

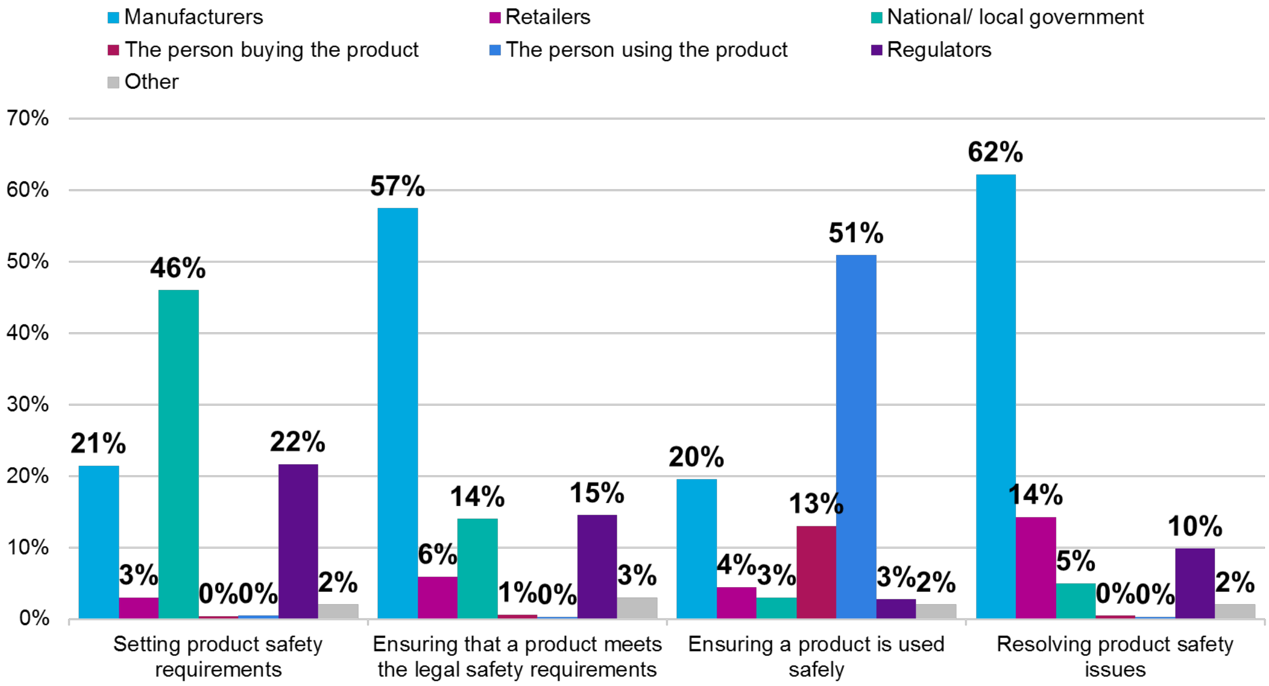
The UK public are most likely to say that Government is most responsible for setting product safety requirements (46%) but only small minorities feel the Government is responsible for ensuring a product meets safety requirements (14%), that a product is used safely (3%) or resolving any safety issues that might arise (5%).

Manufacturers are seen as being responsible for ensuring that a product meets the legal safety requirements (57% thinking this) and to resolve any product safety issues (62%).

Half of the UK public see the responsibility for ensuring a product is safely used sitting with the user themselves (51%). Although a fifth (20%) of the public put responsibility on manufacturers for ensuring a product is used safely.

A larger proportion of people from a White British background than those from a BAME background feel that the person using the product has the responsibility for a product being used safely (53% v 38%).

Figure 7: Organisation most responsible for aspects of the product safety system



Q: In your opinion, who is most responsible for:
Base: All respondents (n=10,230)

Those people who are classified as having a low level of educational attainment are less likely than those with a high level of educational attainment to think that the Government is responsible for setting product safety requirements (39% vs 54%). Those with lower educational levels are more likely to put responsibility on manufacturers to set safety standards (30% vs 13% of those with high education attainment).

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

- 46% of the offline population feel that manufacturers have responsibility compared with 21% of the general population. Whereas 22% of the offline population feel that Government has responsibility compared with 46% of the general population

The offline population is also less likely than the general population to feel that the person using a product has responsibility that a product is used safely:

- 23% of the offline population feel that the person using the product has responsibility that it is used safely compared with 51% of the general population

In the qualitative research, participants commented that the individual holds some responsibility when it comes to the safety of products e.g. by reading safety information regarding the product, however the consequences of faulty design should not be the responsibility of the individual.

> *“You have to treat things with respect and use them as they are designed to be used” (Has experienced issues)*

> *“There is a safe way to open a bottle but if someone chooses to hit it over their head to open it, what can you do!” (Has not experienced issues)*

Overall participants felt that ensuring product safety is a joint responsibility between the individual, the seller and the manufacturer, with each entity holding responsibility to contact the other in case an issues arise. Regulators and governments also hold responsibility in the context of product safety as they set the standards which must be followed.

> *“I think government has the role of making sure the correct legislation is there to protect consumers” (Has not experienced issues)*

> *“Shared responsibility - it’s like a chain - consumer pressures the regulator - regulator sets standards for the seller and seller enforces standards with the manufacturer” (Has experienced issues)*

The qualitative research also explored what responsibilities lay with different sites. There was a mixed response around who is responsible on eBay and Etsy, overall the sites are felt to have some responsibility, being proactive when it comes to product safety issues, but they cannot be expected to manage all sellers and products. Companies like Amazon are also not expected to police all manufacturers, but if there are multiple complaints then they have a responsibility to take action.

> *“I think they should but I don't think they do. How can they - they literally have millions of sellers on a site like eBay” (Has experienced issues)*

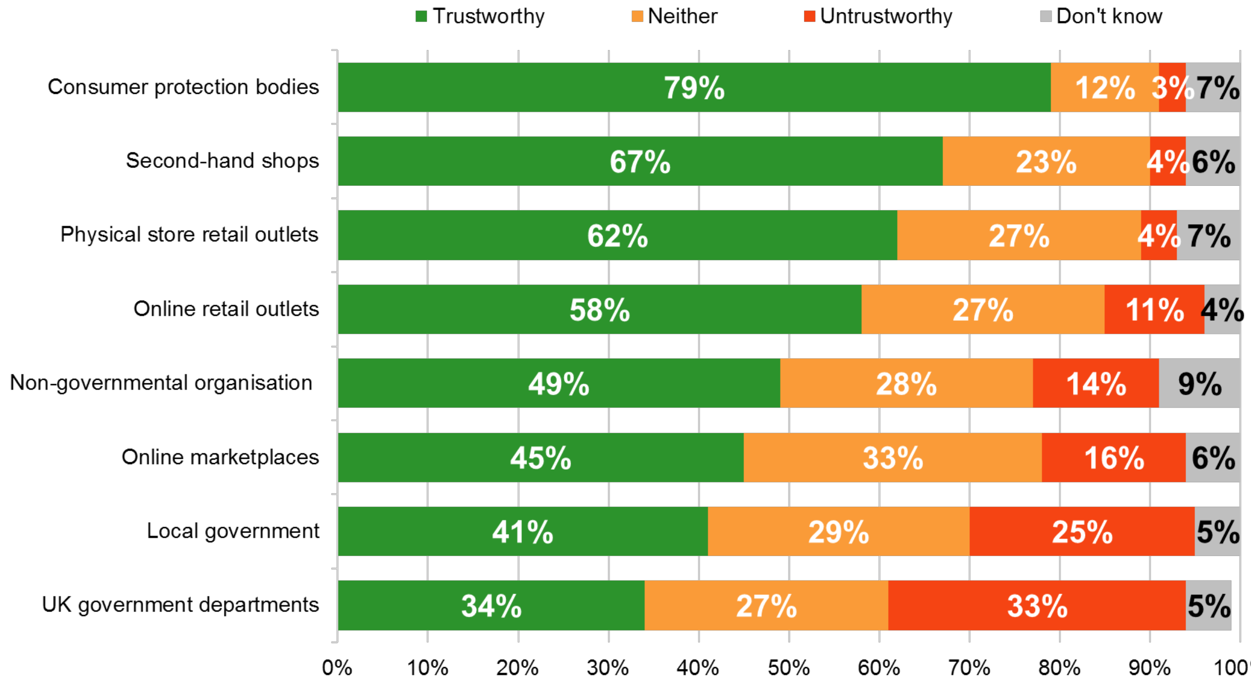
> *“[Companies need to be] proactive, too late when someone has been hurt - or worse” (Has experienced issues)*

Trust in organisations associated with product safety

The UK public were asked to rate organisations that they may interact with as part of the product safety system; from government departments, who set the legal framework for product safety, the retailers which are expected to sell safe products, to the consumer protection organisations which may provide advice on issues. The UK public has strong levels of trust in consumer protection organisations (e.g. Citizens Advice, Which?), with eight in ten (79%) saying they consider them to be trustworthy in how they operate towards them personally.

Over half the UK public also consider second-hand shops (67%), physical store retail outlets (62%) and online retail outlets (58%) to be trustworthy in how they operate.

Figure 8: Levels of trust in different organisations



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

The lowest levels of trust are seen in UK government departments and local government. Although trust in UK Government departments' increases with age, with 43% of those aged 65+ considering UK government trustworthy compared with 30% of those aged 18-29 years old.

Close to half (45%) of the UK public feel that online marketplaces are trustworthy in how they operate towards them. This is broadly consistent across most demographics, although those with a high level of educational attainment (20%) are more likely than those with a low level of educational attainment (13%) to disagree that online marketplaces are trustworthy.

Perceptions of the Office for Product Safety & Standards (OPSS)

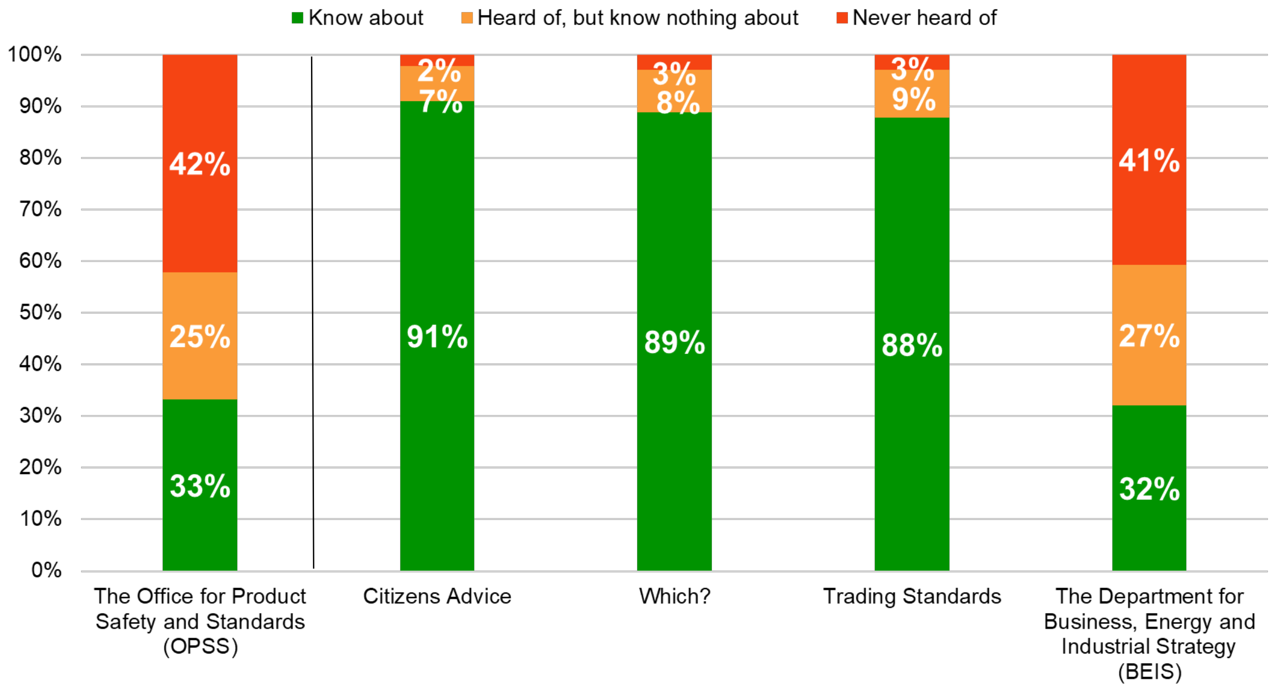
Key findings

- One third (33%) of the UK public report that they have at least some knowledge of OPSS. On par with the proportion of the public (33%) who know something about the Department for Business, Energy and Industrial Strategy (BEIS)
- This increases to just under six in ten (58%) when looking at overall awareness of OPSS
- Those who know about OPSS have strong levels of trust in the department; the majority (56%) think it is a trustworthy organisation, with close to one in ten (9%) reporting stating that it is very trustworthy
- Over half (53%) of those who know about OPSS report that its work is effective compared to only 10% who think it is not
- OPSS is most commonly associated with being professional (25%) by those who are aware of it. This is followed by accountable and impartial (both 22%)
- Participants in the qualitative research valued the fact that OPSS was an organisation which valued consumer protection

Awareness of OPSS

When asked to what extent they had heard of, or knew about, OPSS, three-fifths (58%) of the UK public have an overall awareness of OPSS. Looking specifically at knowledge, one third (33%) report they have at least some knowledge of OPSS and its work. This group is largely driven by those reporting they know 'just a little' (23%), while the minority of this group report they know 'a great deal' (2%) about OPSS.

Figure 9: Organisation Awareness



Q: How much, if anything, would you say you know about the following organisations and their work?
Base: All respondents (n=10,230)

The offline population's awareness of OPSS is consistent with these findings, with half (50%) reporting that they have never heard of OPSS, just over a quarter saying they have heard of but know nothing about the organisation (28%) and just a fifth saying they do have knowledge of OPSS' work (22%).

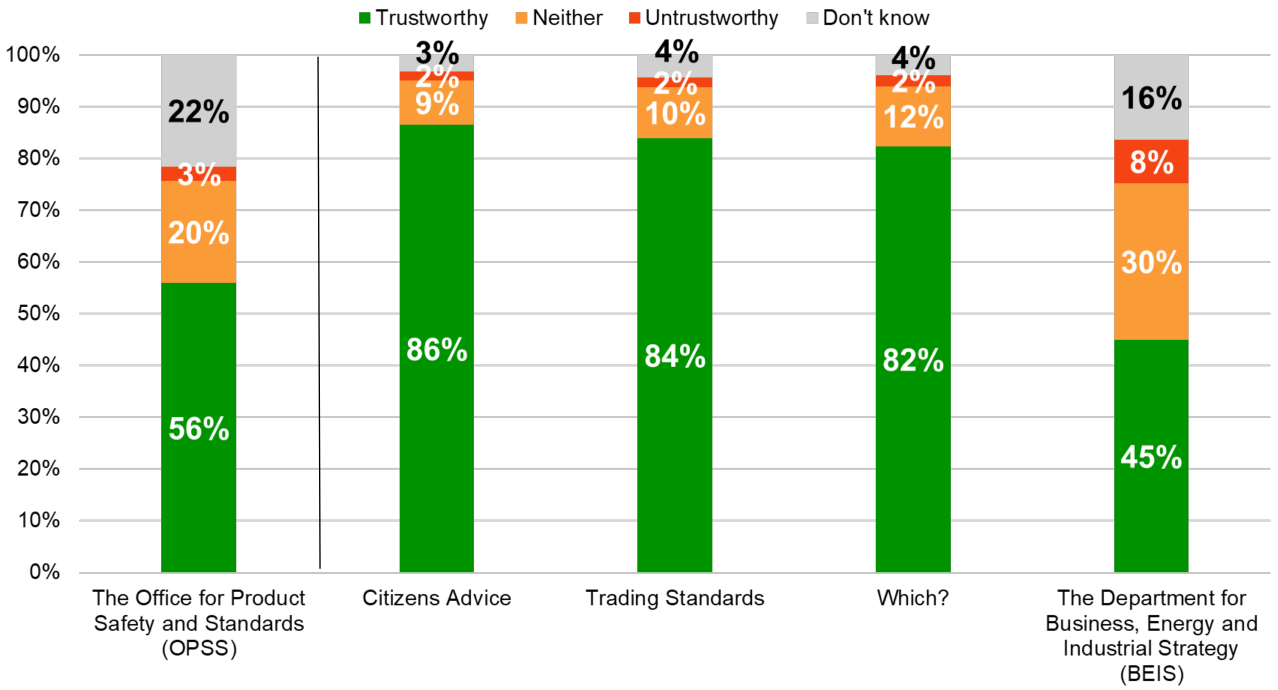
Comparatively, knowledge and awareness for OPSS sits below other organisations (Figure 9), although The Department for Business, Energy and Industrial Strategy (BEIS) sees similar levels of knowledge and awareness (32% and 59% respectively).

Knowledge of OPSS increases with age, among those aged 65+ two-fifths (41%) report having at least some knowledge, compared to three in ten (31%) of those aged 18-64. However, UK adults with low and medium educational attainment are the most likely to report knowing about OPSS (36% and 34% respectively), compared to 30% of those with a high educational attainment, showing there is not a relationship between higher education and knowledge.

Trust in OPSS

Of those who know about OPSS, the majority think it is a trustworthy organisation (56%), with 9% of this group reporting it is 'very trustworthy'. This trust increases amongst those who think that UK Government departments generally are trustworthy (69%).

Figure 10: Trust in Organisations



Q: Of the following organisations, in general how trustworthy or not do you think each are in how they operate?
Base: All respondents who know of organisation (OPSS n=3,314; Citizens Advice n=9,280; Trading Standards n= 8,932; Which n=9,073; BEIS n=3,241)

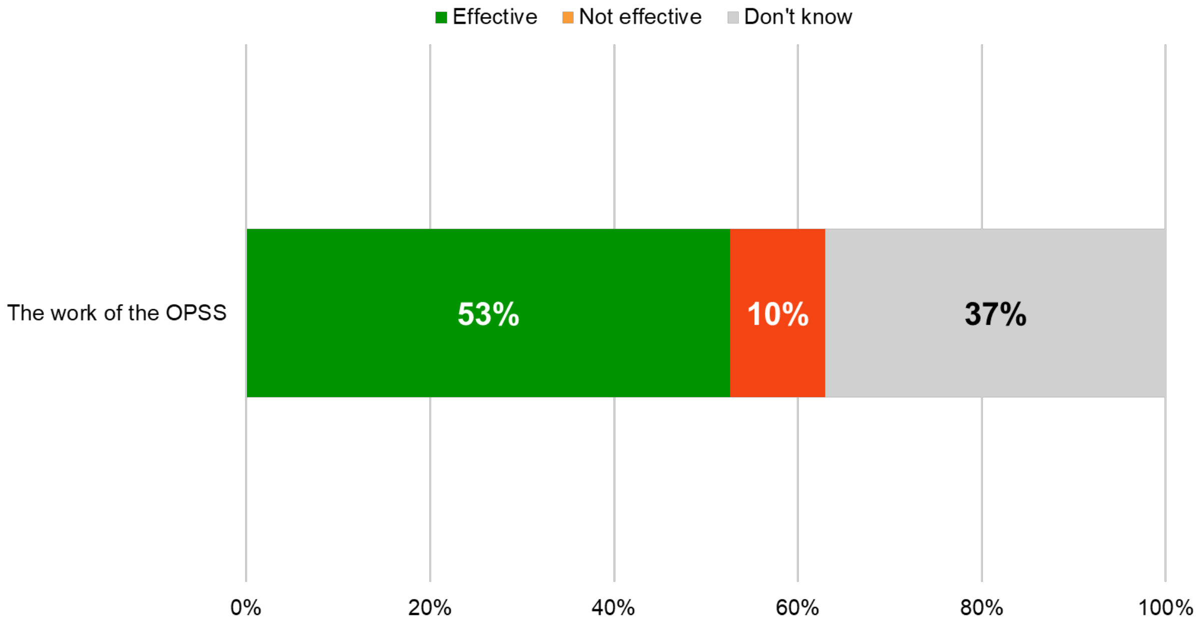
A very small minority believe OPSS is untrustworthy (3%). There is a relatively large proportion of uncertainty, with a fifth (20%) reporting neither trustworthy nor untrustworthy and a similar proportion (22%) reporting they don't know. This is most likely due to most of this audience being populated by those who reported they knew 'just a little' about the Office before.

The offline population are more likely to trust OPSS, with seven in ten of those aware of OPSS saying they consider it trustworthy (70%). Notably, this is not driven by higher trust in general, as levels of trust in Citizens Advice (88%), Trading Standards (82%) and Which? (80%) are all consistent with the general public.

Effectiveness of OPSS

Linked with the strong perception of trust; over half of those who know about OPSS report that its work is effective (53%), compared with only 10% who think it is not effective. The proportion who think it is effective increases significantly to three-fifths (60%) when looking at those who trust UK government departments and continues to increase for those who think OPSS is trustworthy (76%).

Figure 11: Effectiveness of the work of OPSS



Q: How effective or not do you think the work of The Office for Product Safety and Standards (OPSS) is?
Base: All respondents who know of OPSS (n=3,314)

Perceptions of effectiveness increases for respondents who reported experiencing a safety issue with an item they had purchased in the last 6 months; three fifths (60%) of this audience state that OPSS is effective, higher than those who know about OPSS generally.

Comparatively, younger respondents are significantly more likely to think that the work OPSS does is ineffective, with 13% of 18-29 year olds reporting this compared to 8% of those aged 65 and older.

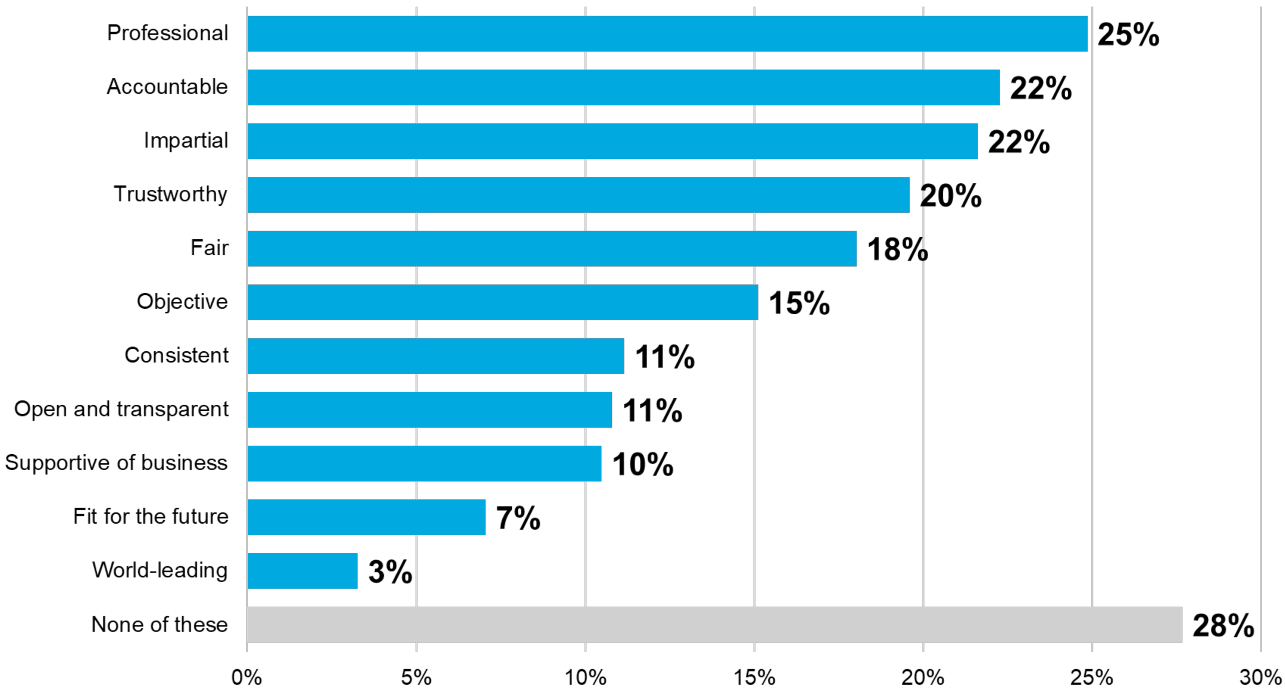
BAME respondents are more likely to think OPSS is not effective (15%), compared to one in ten (10%) white respondents. This is also the case for those living with a disability, (12%) who are more likely to report the Office is ineffective compared to those without a disability (9%).

The offline population are also more likely than the general public to think OPSS is effective (74%), with only one in six (16%) saying the work the organisation does is ineffective. The offline population show much less uncertainty around the effectiveness of OPSS with one in ten (10%) reporting they don't know compared to close to two fifths (37%) of the general public.

Associations with OPSS

Respondents were given a list of words and asked which, if any, they most associated with OPSS. Of this list, professional is the most commonly associated word; a quarter (25%) of those who know about OPSS reported this. This is closely followed by accountable and impartial (both 22%).

Figure 12: Word association with OPSS



Q: Which of the following words, if any, do you most associate with how the Office for Product Safety and Standards (OPSS) operates?
Base: All respondents who know of OPSS (n=3,314)

Three in ten (28%) of respondents report they associate none of the words with OPSS, this is largely driven by those who previously stated they know 'just a little' about OPSS, with the percentage increasing to just under a third (32%) for this audience. Likewise, this proportion decreases when looking at those who reported they know 'a fair amount' (19%) or 'a great deal' (14%), showing a positive correlation between knowledge and favourable associations with OPSS.

All associations increase significantly when looking at respondents who believe OPSS is trustworthy; notably 35% of this audience associate OPSS with being professional, while 30% cite accountable and impartial. Similarly, respondents who reported knowing 'a great deal' about OPSS also saw increased association for many words, a third of this audience report that it is accountable and professional (32%), a quarter report it is trustworthy (26%) and a fifth report the office is open and transparent (20%).

The offline population are more likely to associate almost all words with OPSS than the general public were – only 7% say they do not associate any of the words with OPSS. In particular, the offline population are more likely to consider OPSS as fair (58% vs 18%) and fit for the future (42% vs 7%).

In the qualitative research we explained the role of OPSS, participants valued the fact that there is an organisation which is set up to protect the consumer, alongside other organisations such as Citizens Advice. OPSS were viewed as an organisation which worked to protect the consumer and safeguard the UK public. Though some were concerned about whether OPSS aimed to support businesses or the consumer, as this could lead to tensions.

> *"I think they are doing a difficult job managing both the interests of the consumers and the businesses. Raising awareness of their role would be great" (Has not experienced issues)*

> *"They seem invested both in the consumer and the businesses" (Has not experienced issues)*

Participants would welcome more information on OPSS' work in the future, and feel that their future work could broaden to focus on our relationships with non EU countries as well as local businesses.

> *"If they are resourced and empowered then I think this would be a very worthwhile department" (Has experienced issues)*

> *"I hope they will continue to ensure our imports are safe as well as home grown / made items" (Has experienced issues)*

A focus on online purchasing[5]

Key findings

This section of the survey covered people's experiences and perceptions of product safety when purchasing products through online channels. People were asked to think about purchasing products from different kinds of online channels that covered, online marketplaces which host 3rd party sellers (e.g. Amazon Marketplace and other marketplaces such as eBay, Etsy), online retailers of a range of products (e.g. Argos) and individual manufacturer websites.

- 84% of the UK public agree that the seller is responsible for ensuring a product bought online is safe.
- Compared with other online channels there is greater uncertainty about whether products bought from Amazon marketplace or other online marketplaces are safe. A quarter (24%) of the UK public think that products bought from Amazon marketplace are unsafe and that rises to a third (35%) who think that products bought from other online marketplaces are unsafe. This compares with just 4% who feel that products purchased from online retailers of a range of products (e.g. Argos) are unsafe.
- The qualitative research mirrored quantitative findings in that there is uncertainty around responsibility when it comes to online purchasing from certain sellers, particularly those on online marketplaces.
- While two fifths (39%) agree that online marketplaces take action if there is an unsafe product being sold on their platform, a further two fifths (40%) are unsure and one fifth disagree (21%).
- The UK public is more likely to be concerned (67%) about the safety of products from outside of the EU/UK bought through an online marketplace than they are with products from within the EU/UK.

Perceptions around safety when purchasing online

In the survey, over three fifths (62%) of those who purchased a product in the last six months did so online, including "click and collect" orders. The qualitative research highlights that the ongoing Covid-19 pandemic has meant that buying items online is viewed as not only the most convenient but also the 'go-to' option for buying certain products. Many stated that their attitude towards shopping online had adjusted in the last year; shopping in store has not been possible therefore many have learnt to shop online, often through trial and error.

[5] To ensure all topics could be covered in the survey the sample was split at random and half the sample saw the online purchasing questions and half saw the second-hand purchasing questions

"I'm actually more open to it now than I was a couple years back, I've seen where not to shop" (Has experienced issues)

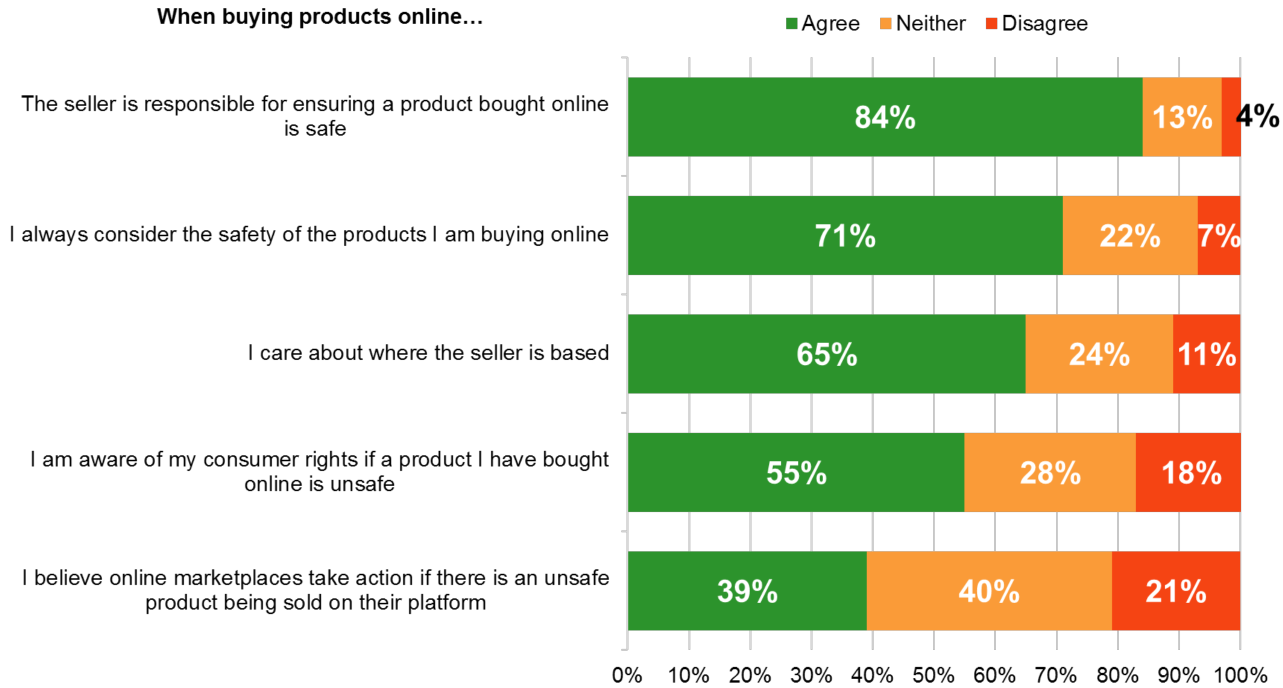
"Personally I've started buying more than ever online due to not being able to go to actual shops due to the virus" (Has experienced issues)

"I prefer to buy some in store to support local businesses but it's harder at the moment" (Has not experienced issues)

There are strong levels of agreement from the UK public that the seller is responsible for ensuring a product bought online is safe, with eight in ten (84%) agreeing that is the case. Seven in ten (71%) agree that they consider the safety of products they are buying online and that they care about where the seller is based (65%).

A fifth (21%) of the UK public disagree that online marketplaces take action if there is an unsafe product being sold on their platform. Although four in ten (40%) neither agree nor disagree that this is the case.

Figure 13: Attitudes towards buying products online



Q: For the following question please think about when you are buying products online… To what extent, if at all, do you agree with the following statements?
Base: All respondents (n=10,230)

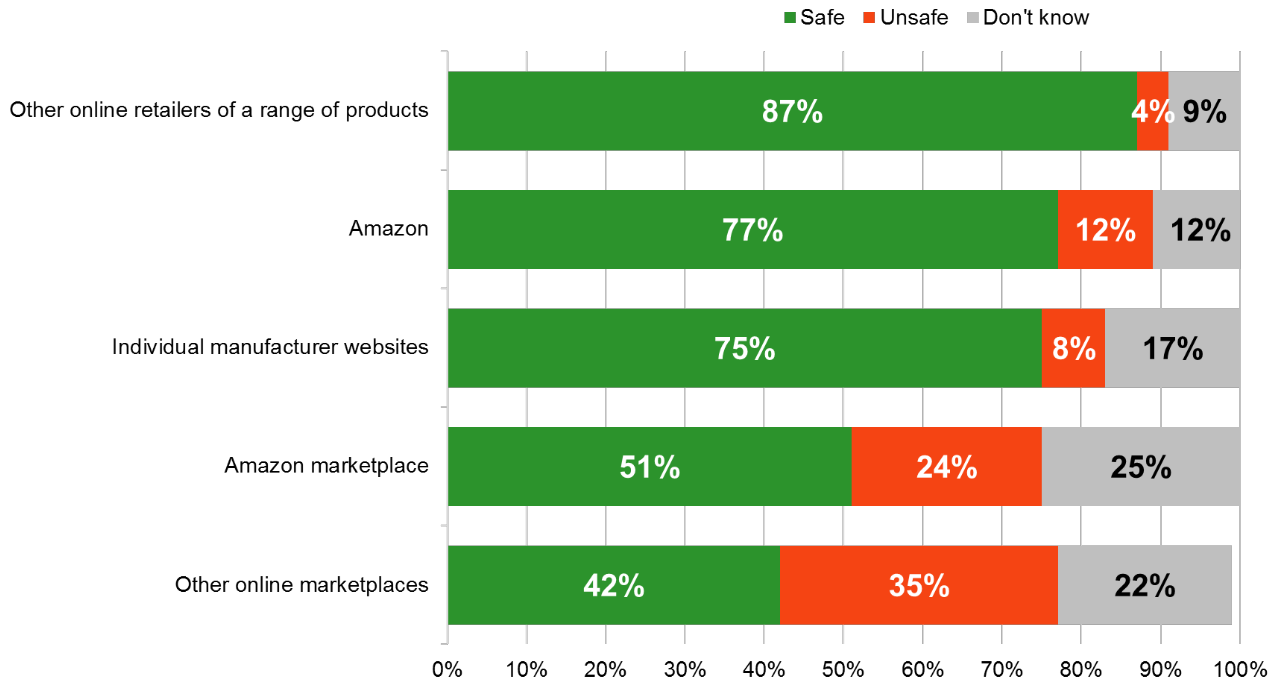
While still a majority, younger respondents (aged 18-29) are less likely than those aged 65+ years of age to always consider the safety of products they buy online (57% in agreement compared with 81%).

Overall, 55% of the UK public agree that they are aware of their consumer rights if a product they have bought online is unsafe. However, younger respondents (aged 18-29) are less likely to be aware of their consumer rights – with a third (33%) disagreeing they are aware compared with only 10% of those aged 65 years plus.

The majority of the UK public are confident in the safety of products bought from online retailers of a range of products or directly from a manufacturer website. Nine in ten feel products purchased from online retailers of a range of products (e.g. Argos) are safe (87%), with three quarters thinking that products from Amazon (77%) or manufacturer websites (75%) are safe.

There is greater uncertainty about whether products bought from Amazon marketplace or other online marketplaces are safe. A quarter (24%) of the UK public think that products bought from Amazon marketplace are unsafe and that rises to a third (35%) who think that products bought from other online marketplaces are unsafe.

Figure 14: Perceptions of safety of products from different online environments



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

The qualitative research found that perspectives on buying online differ significantly depending on website. eBay tends to be met with the unease due to lack of trust with unknown sellers, this can also be the case for Amazon, where there is a perception that certain products and sellers do not have sufficient checks in place. Therefore many prefer buying products direct from manufacturers, as this is felt to increase the likelihood of safety checks being in place.

> *"I feel [with] Amazon and eBay there is a higher chance of purchasing an unsafe product" (Has experienced issues)*

> *"I would like the products that I buy not to blow up or catch on fire but if I'm buying from an unknown source with no safety regulations then there is a risk there" (Has experienced issues)*

In the qualitative research, most participants had a good understanding of what an online marketplace is, they referred to eBay and Etsy as examples, though there was some confusion around the difference between Amazon and Amazon Marketplace.

Participants were reliant on reviews on marketplaces, as well as this, they would often investigate how 'established' the seller appeared to be, as many were concerned about fake reviews on certain sites.

Online marketplaces were thought of as featuring homemade or handmade products made by independent sellers which were felt to be unique.

> *"I'd be less trusting of marketplace, it's a bit of a gamble. Fake reviews can be rife so it'd be reputation of the seller" (Has not experienced issues)*

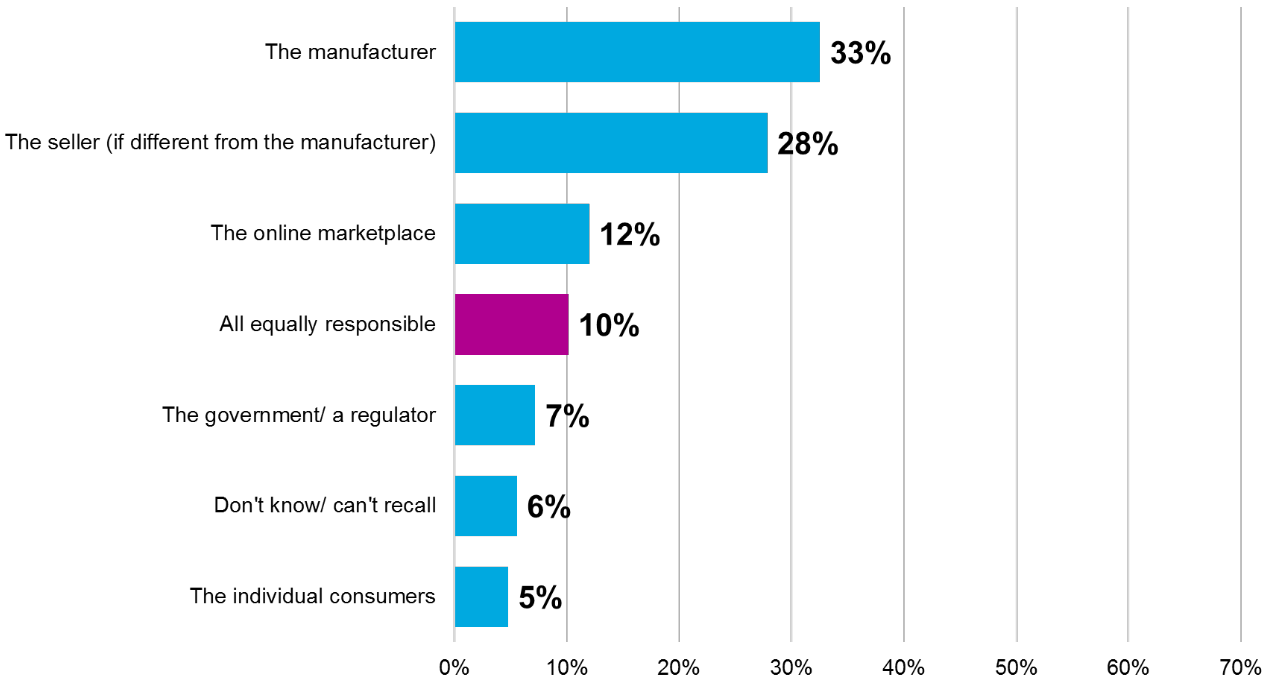
> *"It's hard as I have brought a few geeky bits and pieces off Etsy before but its worrying that they have no form of product safety instructions with them" (Has experienced issues)*

Responsibility for safety when purchasing online

Of people who have purchased products from an online marketplace, one in ten (12%) of them feel that the online marketplace is most responsible for ensuring that the product they purchased is safe.

Similar proportions feel that the manufacturer (33%) and the seller (28%) are responsible for ensuring a product is safe.

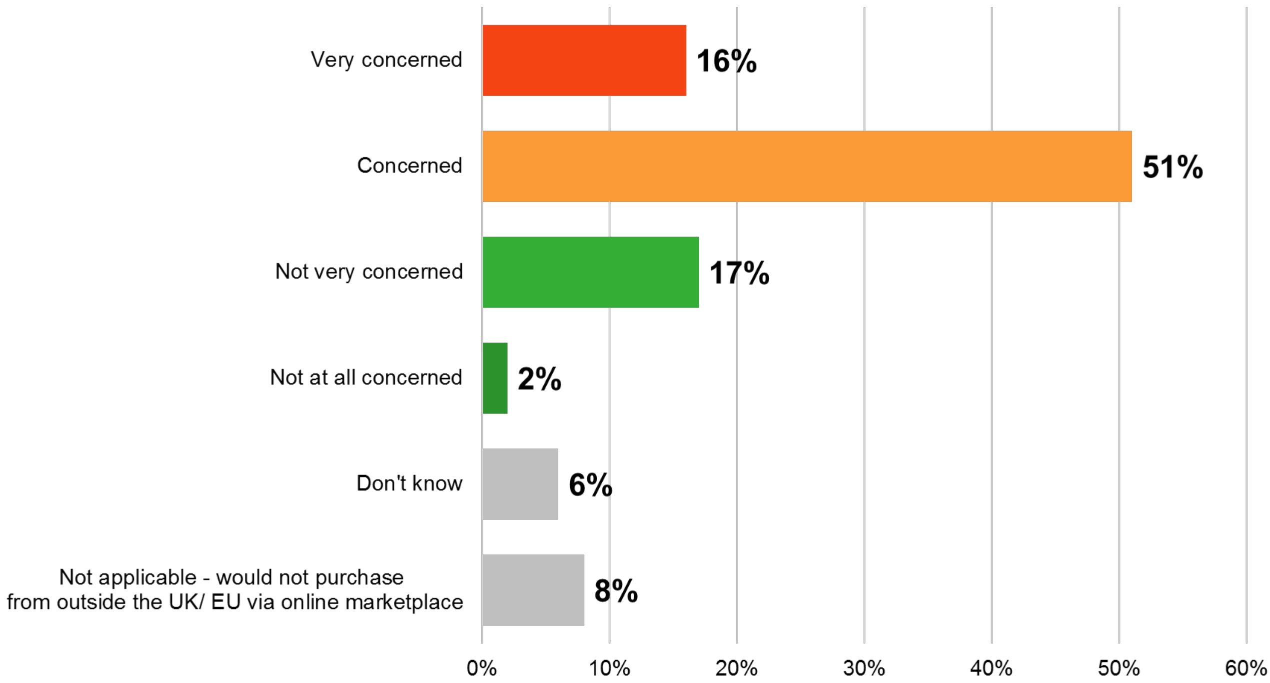
Figure 15: Responsibility for ensuring a product is safe for UK consumers



Q: Who do you think is most responsible for ensuring that the product is safe for UK consumers?
Base: All respondents who purchased a product from an online marketplace (n=795)

Seven in ten (67%) of the UK public would be concerned about a product from outside of the EU/ UK being unsafe compared to a product from within the UK/ EU. Levels of concern increase with age, with 75% of those aged over 65 years of age being concerned about the safety of products bought from outside the EU/ UK compared with 55% of those aged 18-29 years of age.

Figure 16: Concern for a product from outside UK/ EU on an online marketplace being unsafe compared to product from within UK/ EU



Q: If you were purchasing a product from outside the UK/EU through an online marketplace (e.g. eBay, Etsy,

AliExpress etc.), how concerned would you be about the risk of a product being unsafe compared to a product from within the UK/ EU?
Base: All respondents [in online section] (n=5,115)

A focus on second hand goods[6]

Key findings

- Nearly two thirds (65%) of the UK public identified at least one product they would be likely to buy second hand
- Furniture and soft furnishings (37%) and clothes and clothing accessories (32%) are the most frequently cited items that the public would buy second hand
- Those who would buy second hand more commonly say they would do this through offline means (86%) rather than online (79%)
- The majority (78%) who would buy second hand agree that they would consider the safety of the product they are buying. A similar proportion (77%) agree that it is the seller's responsibility to ensure the product is safe, while just over half agree that they are aware of their consumer rights if a product they have bought is unsafe
- Checking the reviews of the seller is the most commonly cited way of ascertaining whether a second hand product is safe (47%), followed by checking to see if the product looks used (40%)

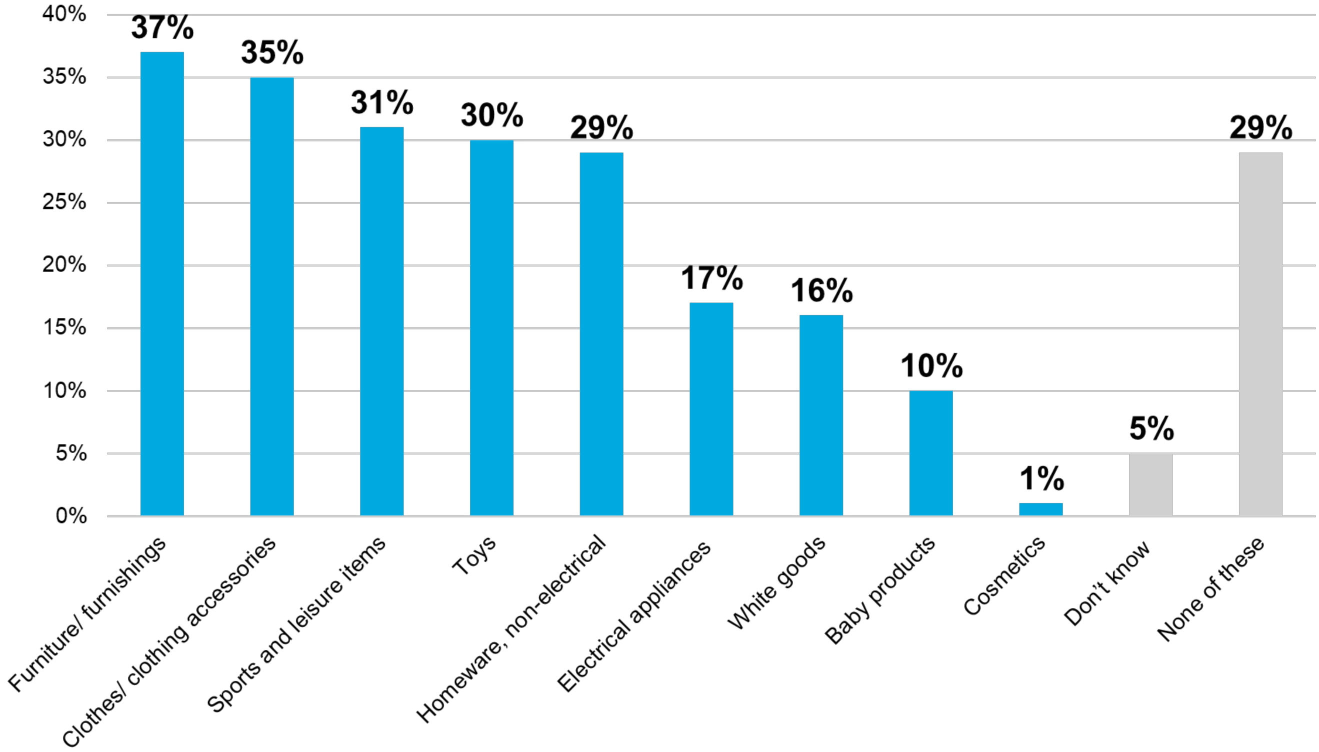
Consideration for second hand purchases

Nearly two thirds (65%) of the UK public identified at least one product they would be likely to buy second hand. Of these products, respondents are most likely to purchase furniture / furnishings (37%), clothes / clothing accessories (35%) and sports and leisure items (31%). While white goods (16%), baby products (10%) and cosmetics (1%) are the least likely to be reported.

Respondents with a household income of under £25,000 are more likely to purchase at least one product second hand (69%) compared to the overall, as are those who have at least one child in their household (70%).

[6] To ensure all topics could be covered in the survey the sample was split at random and half the sample saw the online purchasing questions and half saw the second hand purchasing questions

Figure 17: Products likely to buy second hand

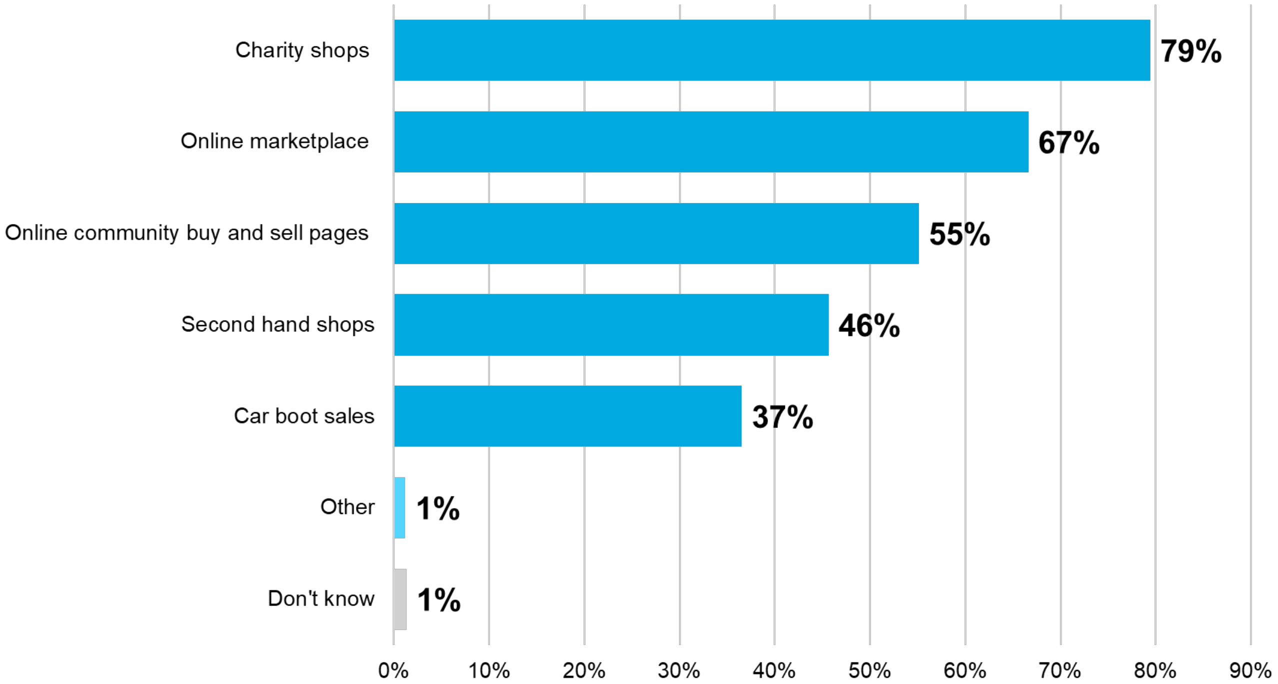


Q: Today, if you were looking to buy these types of products, which would you be likely to purchase second hand rather than new? (Please select all that apply)
Base: All respondents [in second hand section] (n=5,115)

Offline consumers are less likely than the general public to say they would buy products second hand – half (51%) would not buy any of the listed product categories second hand.

Although overall people are more likely to purchase second hand products through offline means rather than online (86% compared to 79% respectively), the top three methods are charity shops (79%), online market places e.g. Amazon, eBay, Etsy etc. (67%) and online community buy and sell pages e.g. social media community groups such as Facebook Marketplace, Gumtree etc. (55%).

Figure 18: Places to purchase second hand products



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

Although the majority report they would use a charity shop for second hand purchases, those buying electrical appliances are most likely to report they would use online marketplaces (e.g. Amazon Marketplace, eBay, Etsy) (79%), while those who would buy cosmetics are most likely to report online community buy and sell pages (58%).

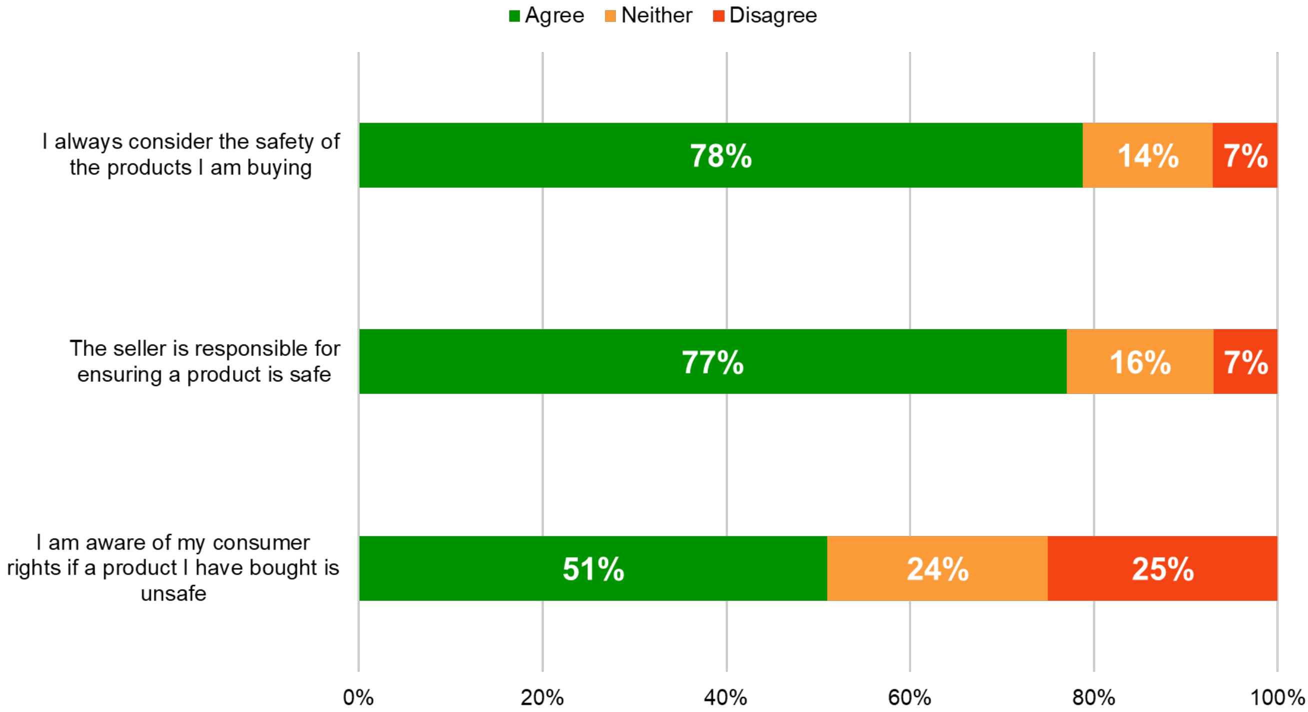
Participants in the online focus groups stated that they were trusting of charity shops as they were likely to have checks in place, particularly PAT testing. This implies there is good knowledge of the official guidance that charity shops should have official permission to sell electrical equipment and the right safety checks in place. As well as this, charity shops tend to be established within communities therefore are trusted; though some stated that they would be unlikely to buy electrical equipment from them.

> *"More trusting of charity shop, feel they have checks in place" (Has not experienced issues)*

Safety considerations for second hand products

The majority of respondents who would buy items second hand agree that they consider the safety of these products when purchasing (78%). Those aged 65+ are the most likely to consider this (92%), significantly higher than all other age groups. Comparatively those aged 18-29 are significantly more likely to disagree that they consider the safety of their second hand purchases (16%) compared to all other age groups.

Figure 19: Agreement on second hand products and safety



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

Concurrently, younger age groups (18-29) are the most likely to assume responsibility of the seller. A little over four fifths (83%) of 18-29 year olds who would purchase second hand products agree that the seller is responsible for ensuring a second hand product is safe, compared to three quarters (77%) of respondents overall.

Despite over three quarters considering the safety of their purchases, one half (51%) of those who report they would purchase second hand products agree they are aware of their consumer rights if a product they have bought is unsafe. Of this group, one in ten (10%) strongly agree that they are aware of their consumer rights.

The proportion of those who agree that they are aware of their consumer rights is consistently higher when looking at those who know about different consumer and business rights organisations[7], overall half (52%) of those who report knowing about any consumer and business rights organisation report they are aware of their rights. For those who report knowing about OPSS, the proportion who agree that they are aware of their consumer rights increases significantly to 67%.

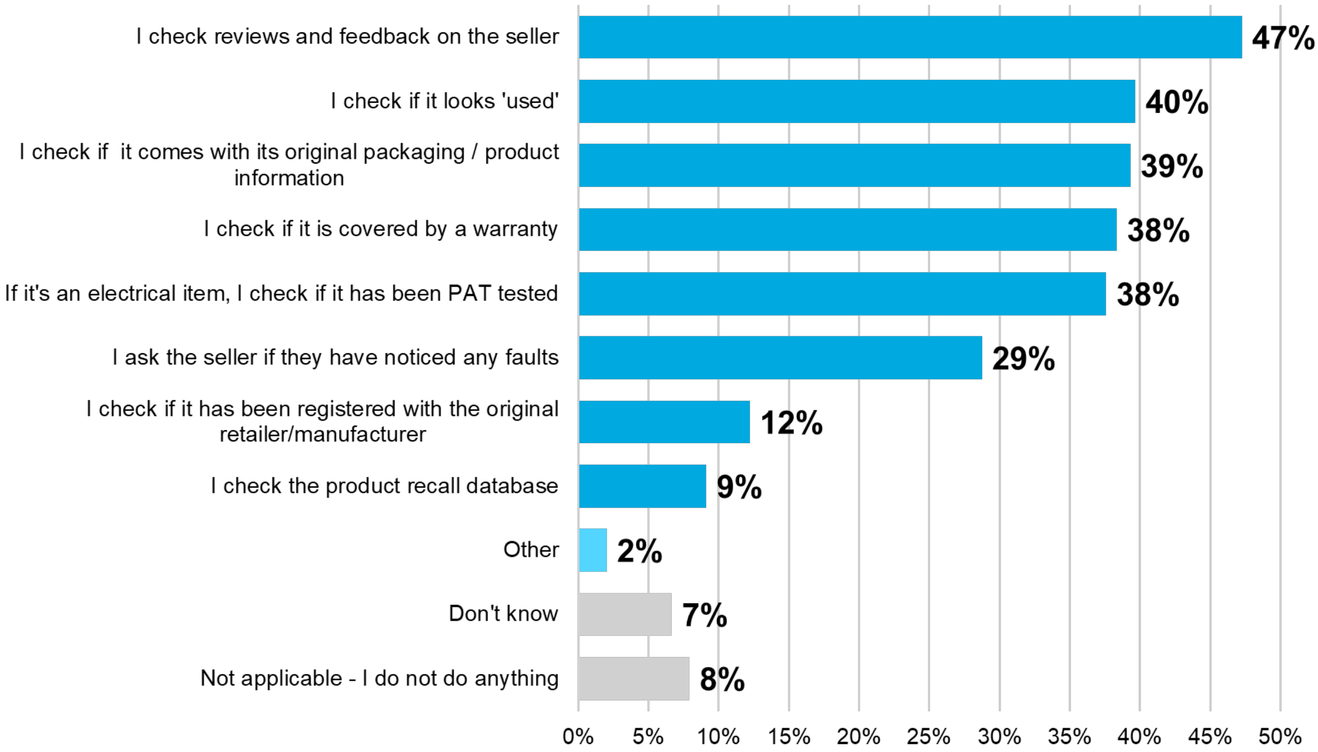
Offline consumers who shop second hand are more likely than the general public to agree with each statement – nine in ten say they always consider the safety of products

[7]The Office for Product Safety and Standards (OPSS), The Department for Business, Energy and Industrial Strategy, Trading Standards, Which?

(91%), eight in ten believe the seller is responsible for ensuring a product is safe (81%), and seven in ten are aware of their consumer rights if a purchase is unsafe (72%).

A small minority of respondents who would buy second hand do not do anything to determine whether a product is safe (8%). For those who do check, checking reviews and feedback on the seller are the most commonly used method to ascertain safety with just under a half reporting this (47%). This is followed by checking to see if it looks 'used' (40%) or if it is in its original packaging (39%).

Figure 20: Ways of determining safety of second hand products



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

The proportion of those who check reviews and feedback on seller increases to 55% for those who would purchase second hand through an online marketplace or online community buy and sell pages. Just under two fifths of those who would buy second hand on a marketplace (36%) or community buy and sell pages (37%) check to see if it has been PAT tested, this is significantly lower than those making a second hand purchase in charity shops.

Respondents who would buy baby products, electrical items and white goods are the most likely to check if a product is safe through reviews and feedback on the seller (59%, 58% and 55% respectively).

Just under one in ten (9%) report checking a database of products that have been recalled to ascertain the safety of a second hand product. This is largely driven by older respondents; 12% of those aged 55 and over report checking this, compared to 6% of 18-29s.

Experiences of Safety Issues

Key findings

- Less than one in ten have experienced safety issues with products they purchased in the last 6 months. Safety issues are most prevalent for extractor fans (11%), cots (10%) or baby carriers (10%).
- On average, where one is the least serious issue and 10 the most serious, those who experienced a safety issue rated the seriousness just below the midpoint at 4.41. Those with an issue related to baby products gave the highest serious rating.
- The most commonly reported impact is stress (22%), followed by physical harm (15%) and damage to property/ household items (12%).
- The majority of individuals take action when they experience a safety issue (75%), with returning the item for a refund/ exchange the most common result (21%).
- Individuals often wish to protect others from safety issues therefore feel a responsibility to report the issue however others felt a sense of apathy around reporting a perceived ‘minor’ issue.
- A quarter of those who did not take action say the safety issue was not important enough (27%), while a fifth did not think taking action would have made any difference (21%) or reported that the issue resolved itself (19%).
- Two-thirds said that, when they first experienced the safety issue, they thought it would be easy to deal with on their own (65%) and just over half thought it would be easy to get help (54%).

Seriousness of safety issues

Of those who bought a product within the last six months, less than one in ten had a safety issue with that product (8%). This rises to one in ten of those who bought an extractor fan (11%), cot (10%), or baby carrier (10%).

On a scale of one to ten, where one represents respondent’s perception of the least serious type of issue and 10 the most serious – on average, individuals rate their safety issue with the product they purchased as just below the midpoint at 4.41.

The perception of severity varies considerably according to the context of the product category. Although only a small number experienced issues with baby products, issues with baby products are on average perceived to be more serious than other product categories (5.51). Those who experienced a safety issue with cosmetics gave the lowest average rating of seriousness (3.62).

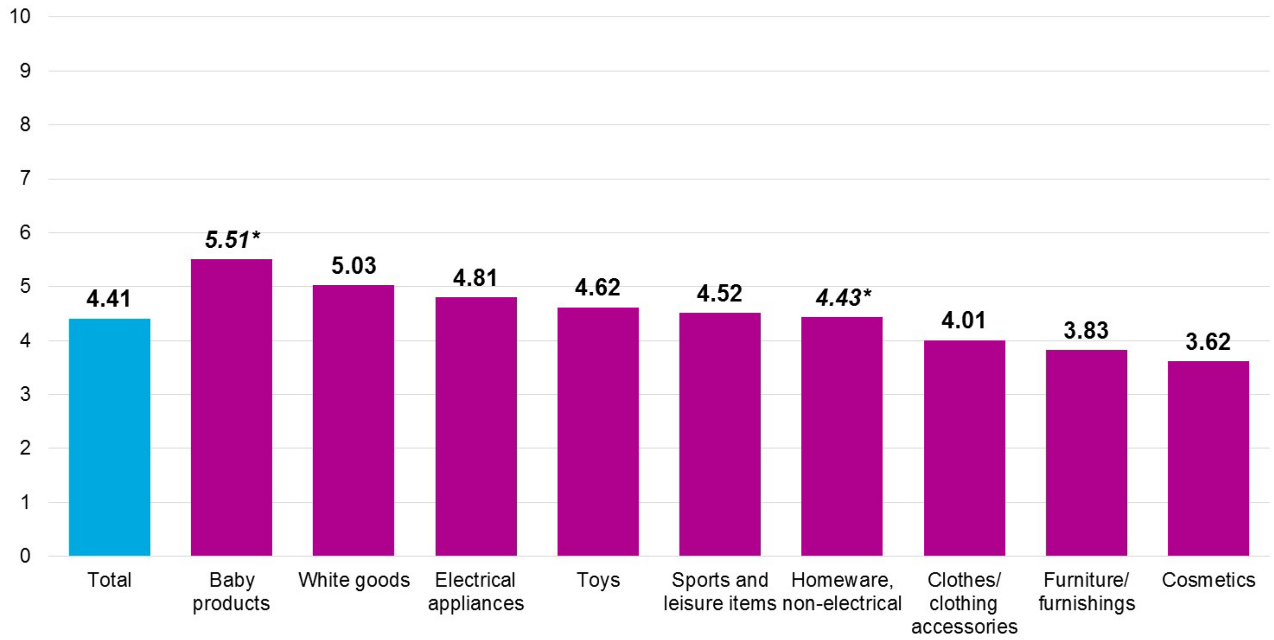
Overall a quarter of respondents (24%) gave the lowest possible seriousness rating (one out of ten), with this rising to two-fifths of those who experienced a safety issue related to cosmetics (40%). A third of those who experienced a safety issue with clothes/ clothing accessories (33%) gave it the lowest possible seriousness rating as did three in ten of those who experienced a safety issue with furniture/ furnishing (29%).

People aged 30 to 49 gave their safety issue the highest average rating on the scale of seriousness (4.82), while older adults aged 65+ rated their issue as only 3.55 overall. Black, Asian, and minority ethnic (BAME) individuals gave a higher average rating for their issue (4.92) than individuals from a White background (4.25).

> *"I purchased a toy from Amazon which I thought was unsafe for the age of the child. Loose parts falling off which were a choking hazard. I just threw it in the bin and did not raise it anywhere" (Has experienced issues)*

> *"My phone battery charger when connected to the mains power it started to melt and went pop" (Has experienced issues)*

Figure 21: Average perceived rating of the seriousness of their safety issue

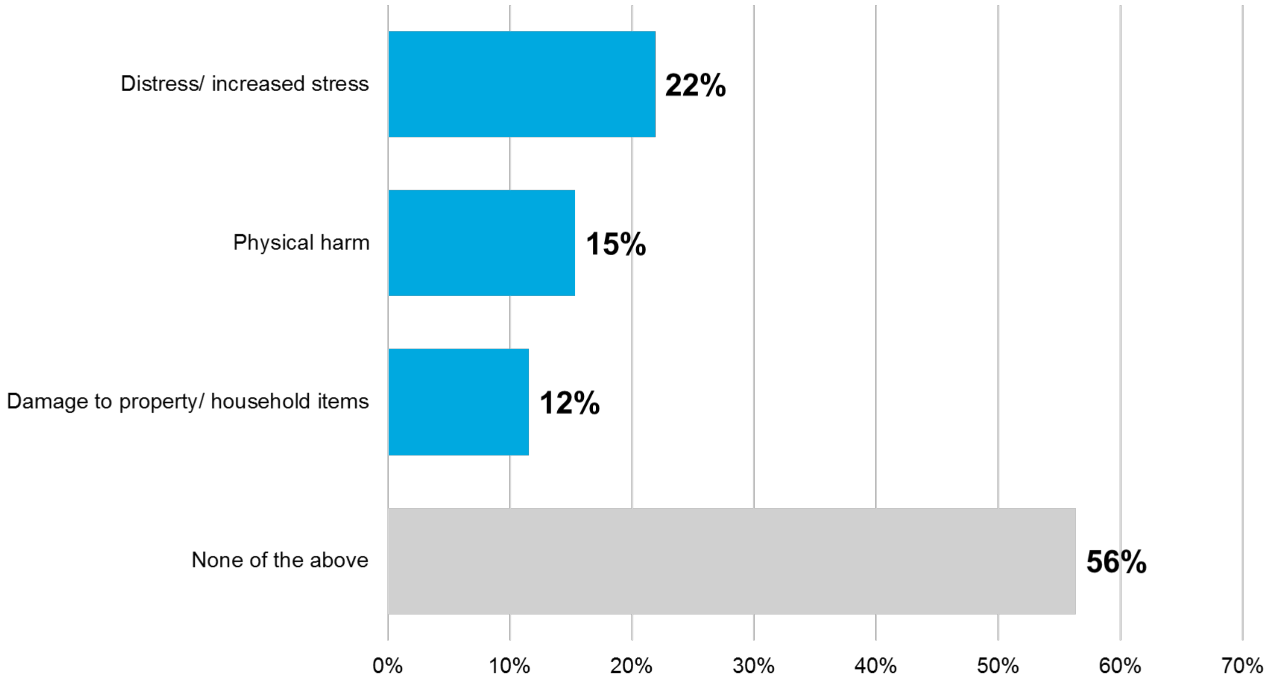


Q: Thinking about the safety issue you had with the following product: Please consider a scale of 1 to 10, where 1 represents the least serious type of issue you could face and 10 represents the most serious. What number best represents the seriousness of the issue?
Base: All who experienced a safety issue with a listed product: total (n=591), product asked about: baby products (n=29*), toys (n=61), white goods (n=50), electrical appliances (n=110), cosmetics (n=79), sports and leisure items (n=67), furniture/ furnishings (n=62), homeware (n=47*), clothes/ clothing accessories (n=86)
*Note: small base, treat with caution

Impact of safety issues

Among those who have experienced a safety issue with the product they purchased, the most commonly reported impact is stress (Figure 22). Just over a fifth (22%) say they experienced distress/ increased stress as a result of their safety issue, while one in seven (15%) report experiencing physical harm, and over one in ten (12%) report damage to their property/ household items. Those who experienced an issue with cosmetics are the most likely to report experiencing physical harm (33%), while those who had an issue with white goods are most likely to report property damage (26%).

Figure 22: Experiences as a result of a product safety issue



Q: You said you experienced a safety issue with the following product: Did that safety issue cause any of the following?
Base: All who experienced a safety issue with a listed product (n=591)

Of those who experienced physical harm as a result of their safety issue, three in ten (30%) did not need any aid or healthcare and a similar proportion required first aid such as a plaster or compression bandage (29%). However, one in eight required either urgent medical attention such as visiting Accident and Emergency (13%) or non-urgent medical attention such as visiting their GP (13%). A further 8% required tertiary medical attention such as specialist or prolonged healthcare as a result of the harm caused by their safety issue.

The most common form of property damage experienced as a result of safety issues is dents/ scratches to their property (51% of those who experienced damage), followed by electrical damage (28%) and smoke damage (17%). One in eight (13%) experienced fire damage as a result of their safety issue. The average (mean) monetary value of the damage experienced and any repairs needed was £470 and the typical (median) monetary value was £100.

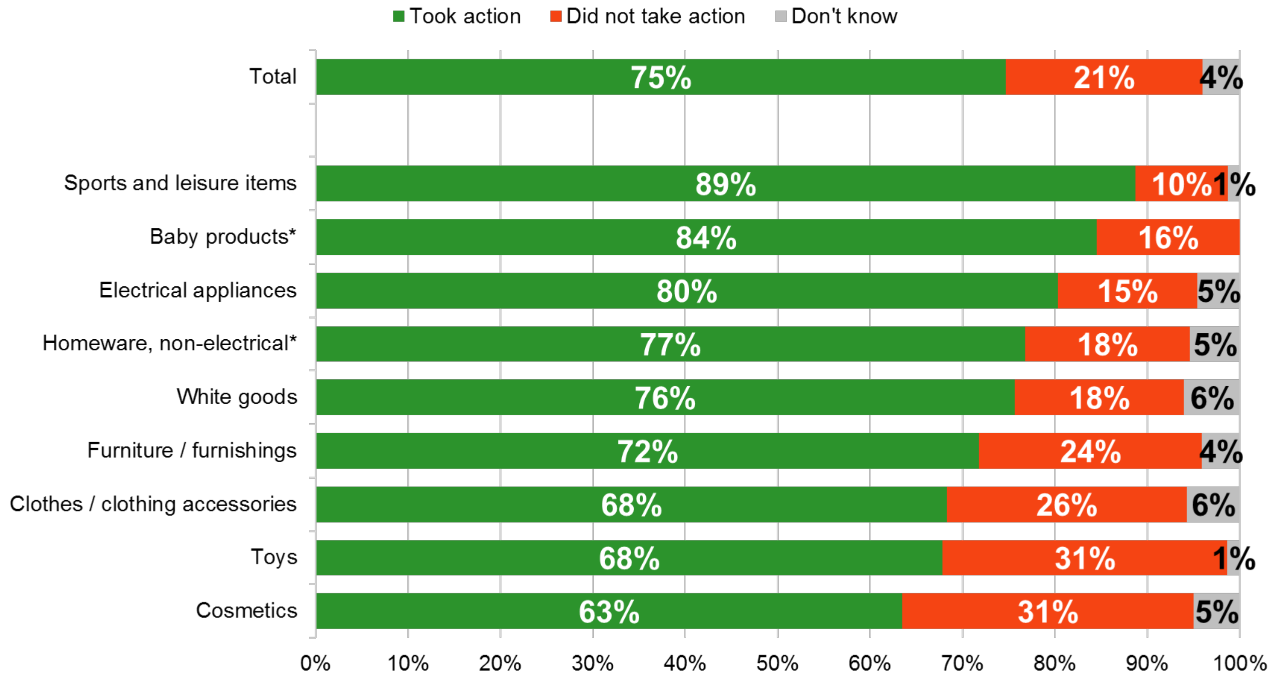
Actions as a result of safety issues

Overall, when people faced a safety issue, three quarters of individuals (75%) take some form of action. This varies across product categories, with individuals who experienced a safety issue with a sport or leisure item the most likely to take some form of action (89%), followed by those who experienced a safety issue with baby products (84%). Just under a third of those who experienced a safety issue with toys or cosmetics took no action at all (31% each).

There is a downward trend across age for taking action as a result of a safety issue - young people aged 18 to 29 are the most likely to take some form of action as a result of their safety issue (79%), compared to less than two-thirds of those aged 65 and over (63%). Black, Asian, and minority ethnic (BAME) individuals were more likely to take action compared to people from a White background (82% vs 72%).

Those who give their safety issue a score of eight or more out of ten for perceived seriousness are more likely to take action to those who only give their issue a score of three or less (85% vs 62%).

Figure 23: Actions taken or not, by product category of the safety issue



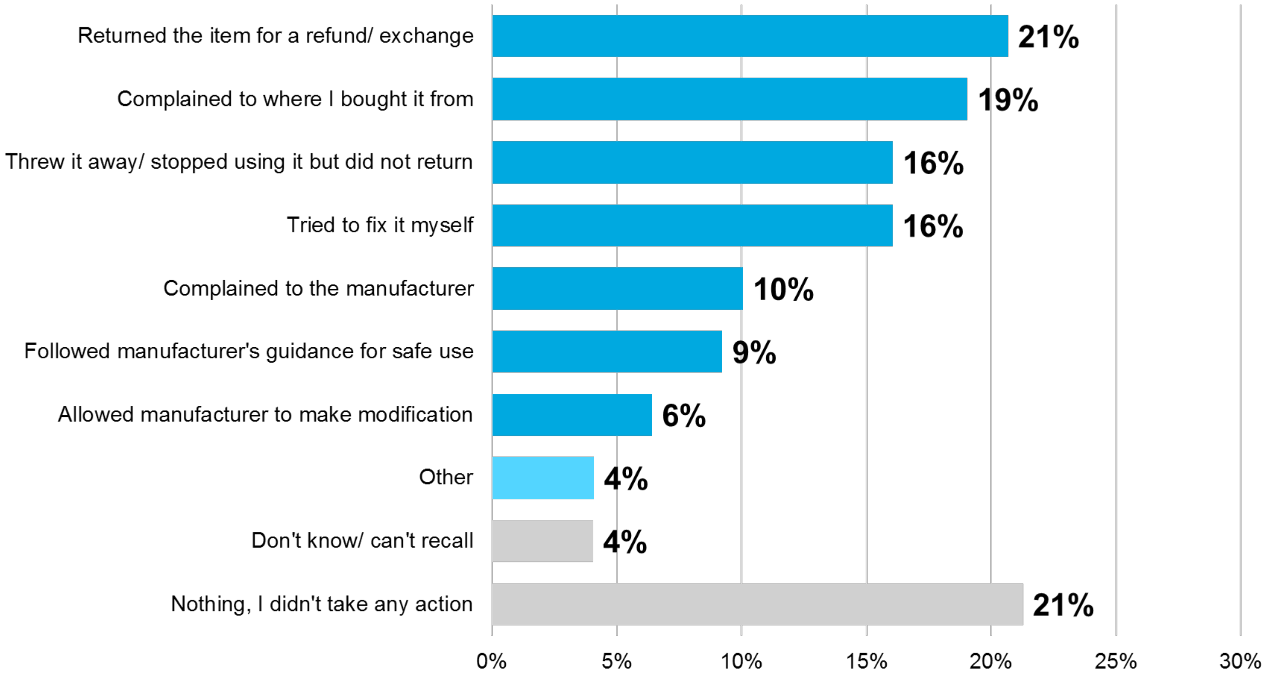
Q: Which of the following actions did you take after becoming aware of the safety issue with the following product:
Base: All who experienced a safety issue with a listed product: total (n=591), product asked about: baby products (n=29*), toys (n=61), white goods (n=50), electrical appliances (n=110), cosmetics (n=79), sports and leisure items (n=67), furniture/ furnishings (n=62), homeware (n=47*), clothes/ clothing accessories (n=86)
*Note: small base, treat with caution

As Figure 24 shows, when faced with a product safety issue, the most common action is to return the item for a refund/ exchange (21%), followed by complaining to the seller (19%). One in six discarded the item in question (16%) or attempted to resolve the issue themselves (16%).

The likelihood that an individual will attempt a repair themselves is linked to age – a quarter of those aged 18 to 29 (25%) attempt to fix the item themselves, less than a fifth of 20 to 49 year olds (17%), one in ten of 55 to 64 year olds (9%), and only 6% of those aged 65 and over do so.

Those aged 65 and over are the most likely to follow manufacturer guidelines for the safe use of an item they have had a safety issue with (15%). Black, Asian, and minority ethnic (BAME) individuals are more likely than their white counterparts to complain to the manufacturer (19% vs 7%) or allow the manufacturer to make modifications (10% vs 5%) while individuals from a White background were more likely than their BAME counterparts to not take any action (24% vs 12%).

Figure 24: Actions taken as a result of product safety issue



Q: Which of the following actions did you take after becoming aware of the safety issue with the following product:
Base: All who experienced a safety issue with a listed product (n=591)

The most common reason for not taking any action in response to a product safety issue is that the safety issue was not important enough (27%). A fifth believe that taking action would not have made any difference (21%) and a similar proportion report that the issue resolved itself without the need to act (19%). A small proportion of individuals cite taking action as being too difficult (9%) or that they did not know what to do in light of their safety issue (3%).

In the qualitative research many felt that they had a responsibility to inform the seller or manufacturer of the safety issue, to ensure the issue didn't occur for other consumers, as well as to ensure they get a refund for the product. However others felt that the issue was not severe enough to warrant getting in touch with the seller.

> *"I went back to both the online store and the manufacturer but they both tried to pass me off on to the other and neither would take responsibility!" (Has experienced issues)*

> *"Things that are dangerous should be reported. If I had left my laptop on charge and went out for the day my house might have burnt down" (Has experienced issues)*

The qualitative research found that price should not have an impact on safety but it often does. Participants who had experienced product safety issues often felt that this was due to the lower price of the product and some were not surprised when they had an issue with it.

> *"Price and safety go hand in hand - cheap prices often mean corners are cut" (Has experienced issues)*
>
> *"Price should not make it less safe however unfortunately safety does come at a price" (Has experienced issues)*
>
> *"Sometimes if you don't pay much you feel responsible and guilty" (Has experienced issues)*

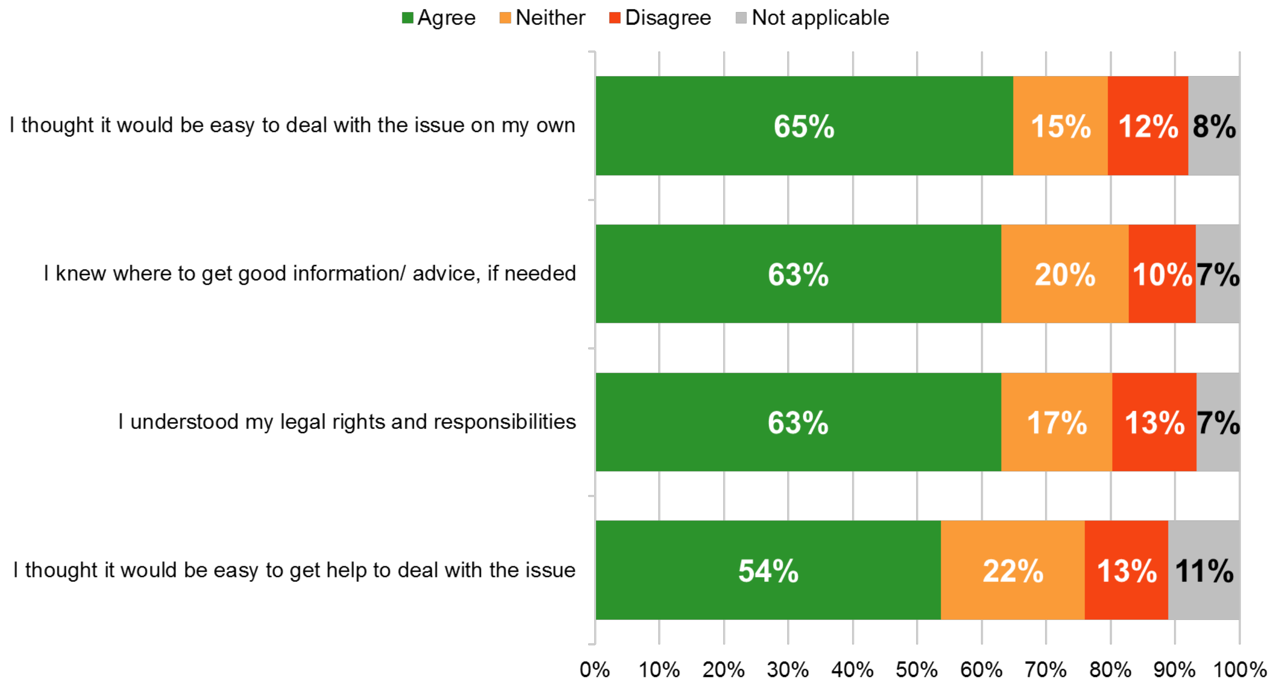
Understanding of rights and responsibilities

When those who experienced a safety issue were asked to think back to the time their issue first started, two-thirds thought it would be easy to deal with their issue on their own (65%), and just under two-thirds (63%) believed they knew where to get good information/ advice if they needed it. Those whose safety issue was with furniture were most confident in their sources of information advice (82%).

Almost two-thirds believe they understood their legal rights and responsibilities (63%) and only one in eight report not understanding their legal rights and responsibilities (13%). Individuals who had a safety issue with white goods were the most likely to think they understood their rights (71%). The age of a person is a distinguishing feature in the understanding rights and responsibilities – half of those aged 18 to 29 understood their rights (49%), rising to two-thirds of those aged 30 to 49 (66%) and those aged 50 to 64 (65%), and highest for those aged 65 and over (76%).

Over half of individuals who had a safety issue said they thought it would be easy to get help for their issue (54%); those who had an issue with furniture the most likely to say so (60%).

Figure 25: Agreement with statements about when safety issue first started



Base: All who experienced a safety issue with a listed product (n=591)

When asked how they felt "today", there was little change in perceptions – just under two-thirds said that it was easy to deal with on their own (64%) or that they now know where to get good information/ advice (64%). Thinking issues are easy to deal with was also unchanged (54%), but there was a small dip in understanding legal rights and responsibilities (60%) – suggesting that legal frameworks were more difficult to understand than initially expected.

Perceptions and Experiences of Product Recalls

Key findings

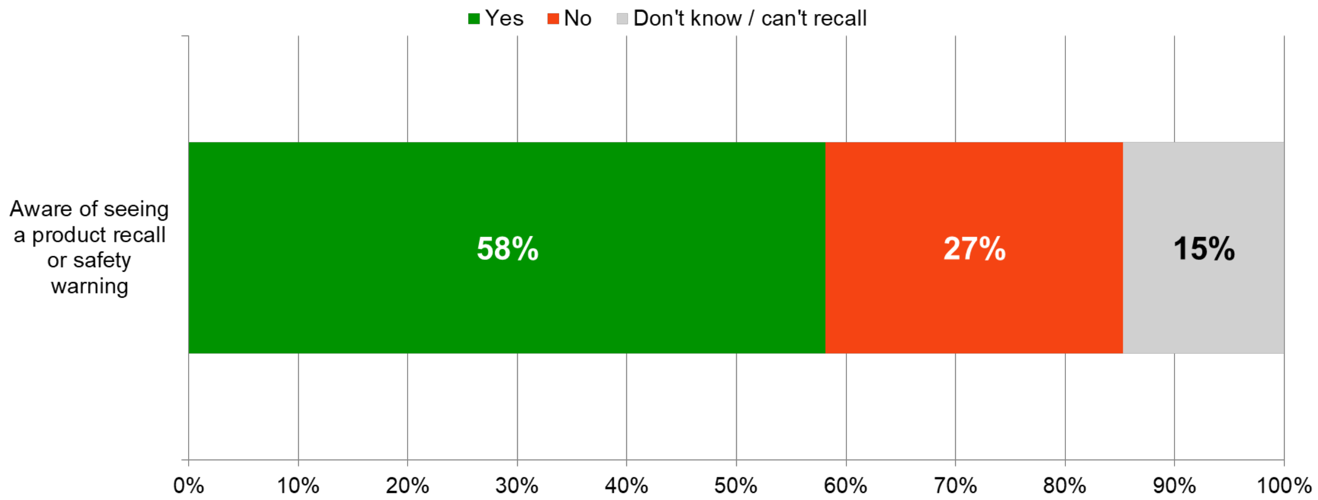
- The majority (58%) of the UK public are aware of seeing or hearing about a product recall or safety notice for consumer products[8] in the last two years.
- Of those who were aware of product recalls, one in ten (10%) had seen or heard one for a product they own.
- Generally, most of the UK public would like to be contacted directly for a product recall notice for something they own; six in ten (61%) would like to be contacted directly by the manufacturer and just over half would like to be contacted directly by a seller (54%).
- However, those who had seen or heard about a recall for a product they own most commonly reported that they had heard about it through the media (36%), while comparably, only a fifth (22%) had been contacted by the manufacturer.
- White goods are the most frequently cited recalled product by those who had seen or heard about a recall for a product they own (45%), followed by electrical appliances (17%).
- One third (32%) of those who had seen a recall for something they own report returning the item for a refund or exchange while a fifth allowed the manufacturer to make modifications (21%) or followed the manufacturer's guidance for safe use (20%). Nearly one in ten (8%) took no action and continued to use the product as it was.

Attitudes towards product recalls

The majority (58%) of the UK public are aware of seeing a product recall or other safety warning for a consumer product (excluding food, pharmaceutical, or vehicle product recalls) in the last two years, compared to just over a quarter (27%) who report they have not seen one.

[8] Excluding food, pharmaceutical, or vehicle product recalls

Figure 26: Awareness of product recalls in the past two years



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

Those aged between 18 and 49 years old are the most likely to report seeing a recall (60%), this is significantly higher than those aged 50+ (57%). There is generally a relatively large level of uncertainty around recollection of product recalls, with just under a sixth (15%) of UK adults reporting they don't know or can't recall. Respondents aged 65 and over are the most likely to state they don't (19%), followed by those aged 50 to 64 (15%).

Those with a high educational attainment are the most likely to report seeing a product recall in the last two years (65%), significantly higher than those with medium (58%) or low (51%) educational attainment, suggesting a link between education and awareness. Similarly, respondents with an ABC1 social grade are more likely than those with a C2DE social grade to report seeing a recall (61% vs 54% respectively)[9]. While C2DE respondents see higher levels of uncertainty (18%) compared to ABC1s (13%).

The offline population are more likely to report not seeing a recall in the past two years (44%) compared to just over a quarter of the general public (27%). They also show a higher level of certainty around recollection of recalls, only 2% report being unsure of whether they have seen or heard one, compared to 15% of the general public.

The qualitative research found that if a product needs to be recalled it damages overall brand reputation, however if the recall is handled early and effectively then recalls do not necessarily mean that brands will be looked upon unfavourably 'forever'.

> *"I remember when there was safety issues with certain brands of dryers, will admit I was cautious of those brands" (Has not experienced issues)*

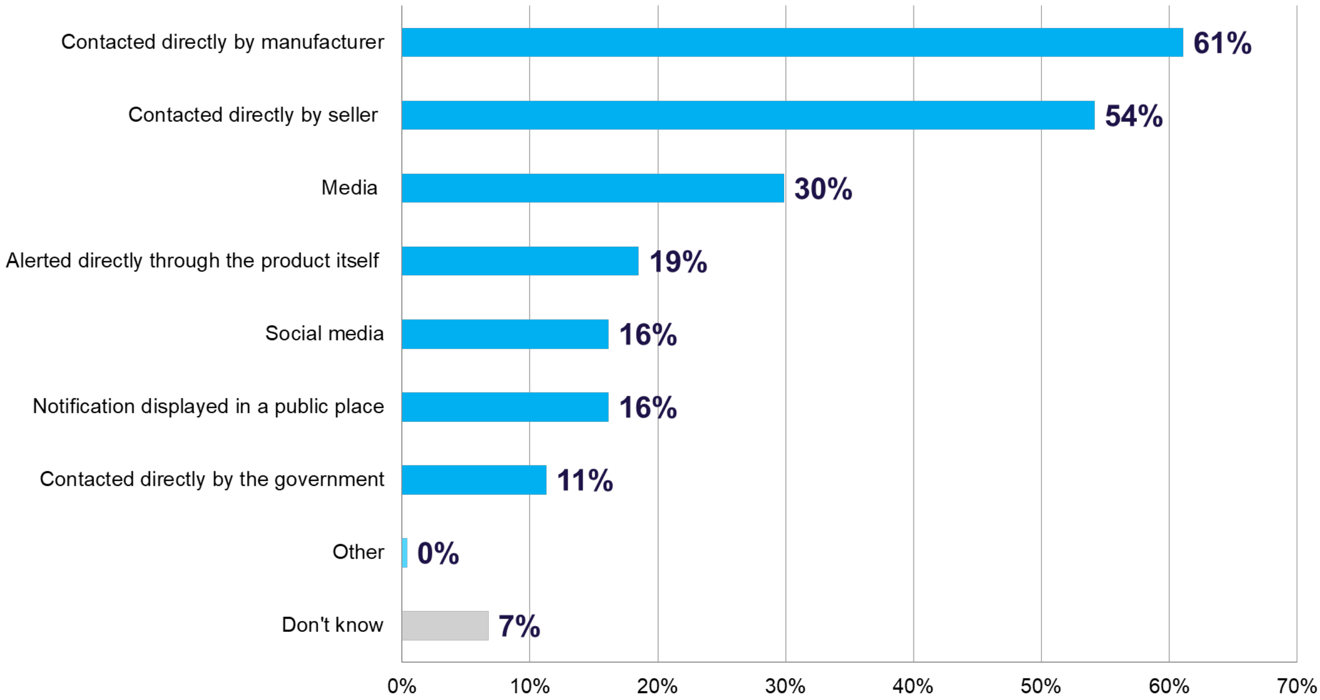
[9] ABC1 and C2DE are references to NRS social grades. Those in ABC1 comprise the three higher socio-economic groups, while those in C2DE comprise the lower three socio-economic groups.

Product recall preferences

Most of the UK public would like to be contacted directly for a product recall notice for something they own: three fifths (61%) report they would like to be contacted directly by a manufacturer, while just over a half (54%) would like to be contacted directly be a seller. This is largely driven by those aged 65 and over, with nearly three quarters (73%) reporting they would like to be contacted by the manufacturer, and 63% reporting they would like to be contacted by the seller.

Despite most preferring to be contacted directly about a recall, of these groups, the majority reported not registering products that could be registered. One third who would like to be contacted directly by a manufacturer (34%) or seller (33%) registered their product, compared to three fifths who did not (58% and 59% respectively).

Figure 27: Preferred way to be informed of a product recall notice



Q: How would you best like to be informed about a product recall notice for a product you own? Please choose up to three methods.
Base: All respondents (n=10,230)

Conversely, younger respondents are more likely to prefer to see a notification displayed in a public place, such as a shop, compared to older respondents; a fifth of 18-29 year olds cited this, compared to 12% of those aged 65 and over.

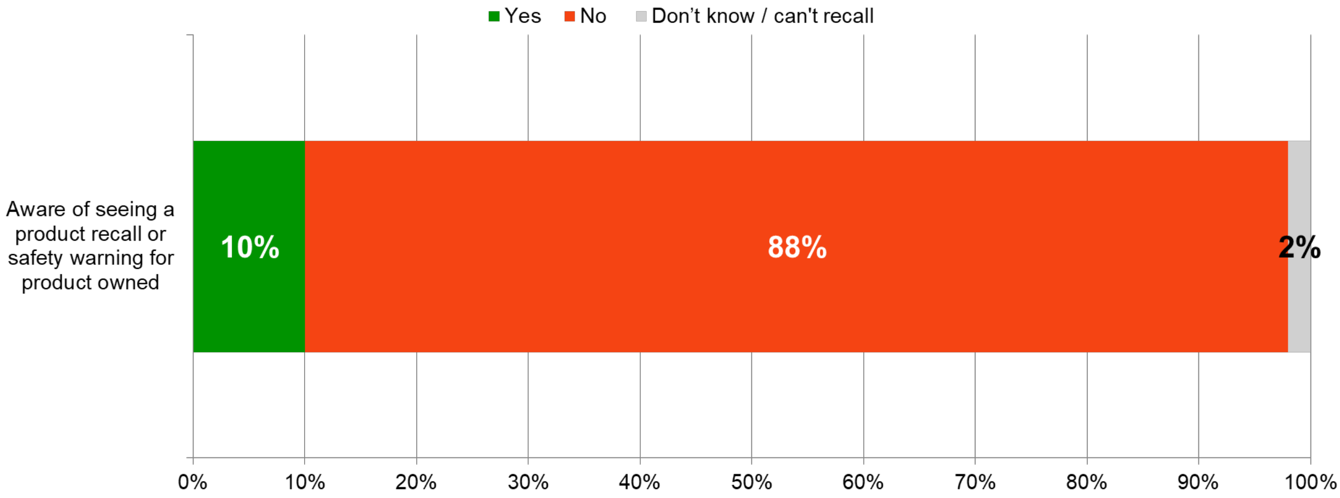
Those who are living with a disability are significantly more likely to want to be contacted directly, compared to those without a disability: 63% report wanting to be contacted by the manufacturer (compared to 60% of adults without a disability), and 13% would like to be contacted directly by the government (compared to 10% without a disability).

Although contact from the manufacturer (53%) or the seller (40%) are the offline population's preferred methods of contact for a recall, they are less likely to want this compared to the general public.

Experience of product recalls

Of those who were aware of product recalls, the minority (10%) had seen a recall for a product they own. However, this significantly increases for those who had experienced a safety issue with a product bought in the last 6 months (22%). Despite this, the majority of those who had experienced a safety issue with a product they had bought report not seeing any recall for something they own (75%).

Figure 28: Awareness of seeing a product recall relating to an owned product



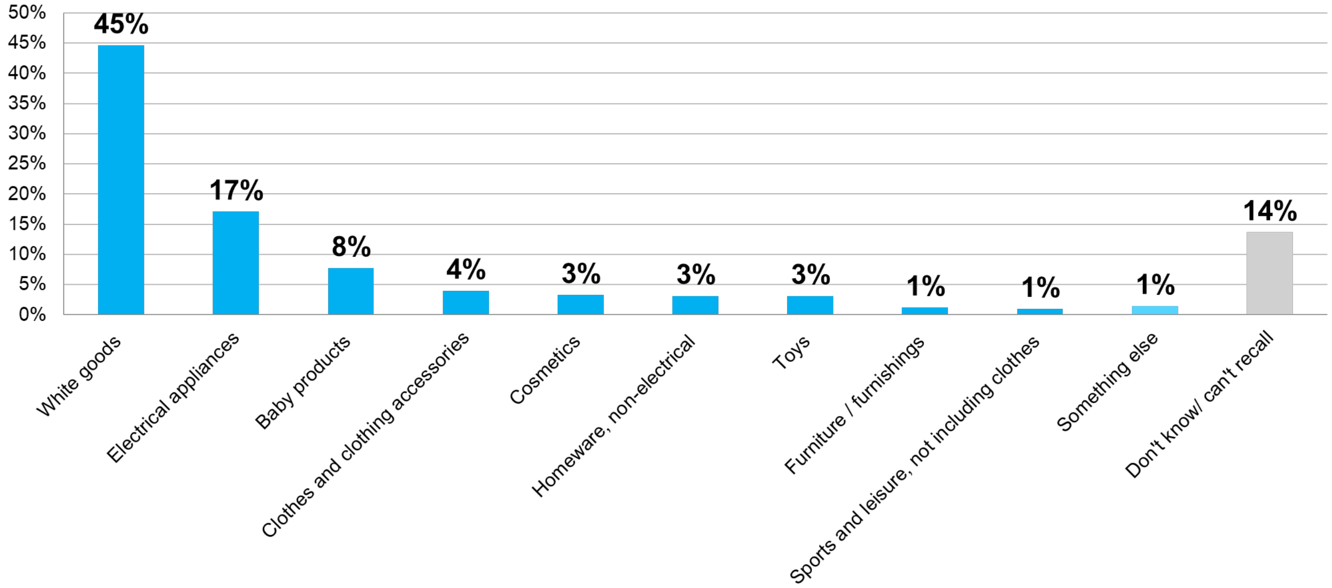
Q: And in the past two years, have you ever seen a product recall notice or other safety warning about something you own?
Base: All respondents who have seen or heard about a recall (n=5,948)

Although younger respondents are more likely to remember seeing a product recall generally, 18 to 29 year olds are significantly less likely than any other age group report they have seen it for something they have owned in the past two years (8%), compared to 11% of those aged 30+.

Generally respondents with a high education attainment are more likely than any others to report being aware of a product recall in the last two years, whereas respondents with low educational attainment are more likely than highly educated respondents to report seeing a recall for a product they own (12% vs 9% respectively).

For those who have seen a recall or safety notice for something they own, this is most commonly for white goods (45%), followed by electrical appliances (17%). Those aged 65 and over are the most likely to report seeing a recall notice for white goods that they own (60%), while those aged between 18 and 29 are more likely than any other age group to report seeing a recall notice for a cosmetic product they own (11%).

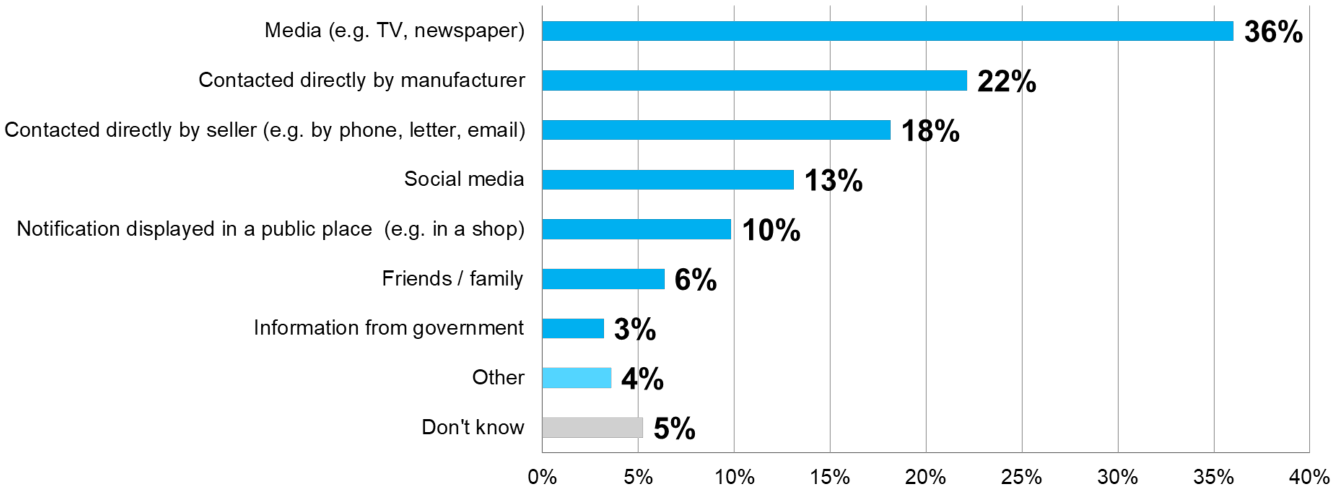
Figure 29: Type of products owned seen in recall notices



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

Although the majority of the UK public reported being contacted directly by the manufacturer would be their preferred way of hearing about a recall or safety notice, for those who have seen a recall for a product they own, media (e.g. TV, newspaper) is the most commonly cited method (36%), while just over a fifth (22%) report being contacted by the manufacturer.

Figure 30: Hearing about recall for product owned

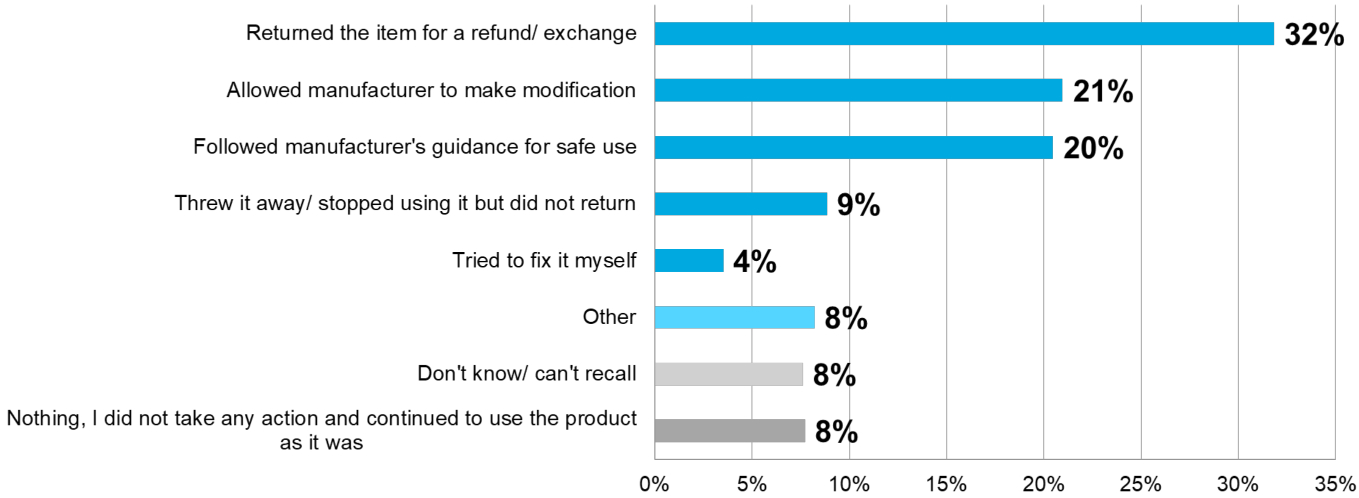


Q: Where did you hear about the product recall notice, or other safety warning?
Base: All who saw product recall notice for something they own (n=620)

There is a discrepancy in how people would prefer to be contacted and how they actually find out about the recalls. Of those who initially reported they would prefer to be contacted by a manufacturer, only three in ten (28%) of this audience report being contacted by one when they experienced a product recall themselves. Likewise of those who stated they wanted to be contacted by a seller, only a quarter (25%) of this group actually experienced this.

After seeing a product recall or safety notice, a third report returning the item for a refund or exchange (32%), followed by a fifth (21%) who allowed the manufacturer to make modifications to the product and 20% who followed the manufacturer's guidance for safe use. Just under one in ten (8%) of those who saw a recall notice for something they own report not taking any action and continuing to use the product as it was.

Figure 31: Action as a result of recall



Q: Which of the following actions did you take after becoming aware of the product recall notice?
Base: All who saw product recall notice for something they own (n=620)

Those aged 18 to 29 are the most likely to report throwing away or stopping using an item because of a recall notice (21%), compared to only 2% of those aged 65 and over. Six per cent of those who are living with a disability reported trying to fix it themselves, significantly higher than those without a disability (2%).

Those who had white goods which were recalled are most likely to either follow the manufacturer's guidance for safe use or allow the manufacturer to make modifications to the product (both 28%).

Those who heard about the recall for something they own from the media are most likely to return the item for an exchange or refund (28%), while 26% followed the manufacturer's guidance for safe use. Comparatively, for those who were contacted directly by the manufacturer about the recall, 33% allowed the manufacturer to make modifications while 31% returned the item.

Perceptions and Experiences of Product Registration

Key findings

- Three in ten individuals who purchase an eligible product register it (31%), with uptake highest for white goods (60%) – specifically washing machines (64%) or dishwashers (63%).
- The most common reason for registering a product is to validate a warranty (73%). Two-fifths register their product so that the manufacturer can contact them in case of an issue (43%).
- Over nine in ten of those who registered a product found the product registration process to be easy (92%), although this drops to eight in ten of those who purchased a sports/ leisure item.
- Eligible products are not being registered because individuals do not know they can (37%) or because they do not think it is necessary (35%). Half of those who bought baby products did not know they could register their product.
- Those that do not think registration is necessary either see no benefit to registration (43%) or think the risk of issues with their product is low (42%). Over a quarter of those who do not think it necessary to register a baby product say they do not understand why they should (28%).
- Clearer guidance on how to register the product or what the benefits are would encourage people to register their products in the future, with younger respondents particularly in need of guidance.

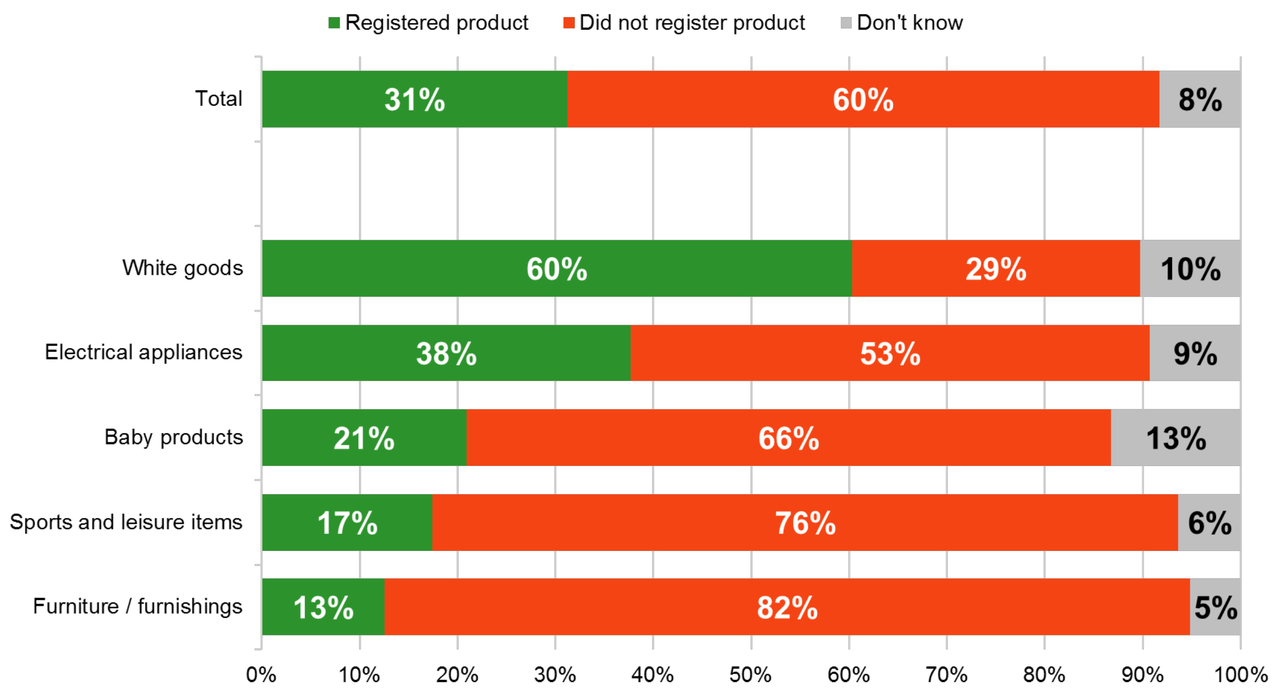
Experiences of registering an eligible product

Individuals who had purchased an eligible product within the last 6 months were asked their experiences of the product registration process – the process of providing their details and the product's details to the manufacturer when they bought it so that the manufacturer could contact them if a safety issue was later identified with that make/ model. Eligible products included electronic appliances, selected baby products, white goods, selected furniture/ furnishings, and selected sports/ leisure equipment. A full list can be found in the technical report.

Overall, three in ten individuals registered their product when they purchased it (31%), with uptake highest for those who had purchased a white good (60%). Two-fifths of those who bought an electrical appliance registered it (38%) and around a fifth of those who bought a selected baby product (21%) or sports and leisure item (17%) registered their purchase. Only one in eight individuals who had purchased furniture/ furnishings registered it with the manufacturer (13%).

Across individual products, respondents who purchased a washing machine/ combined washer-dryer (64%) or a dishwasher (63%) were the most likely to register their purchase. Those who purchased a car seat were the most unsure about whether they had registered it or not (19%).

Figure 32: Registered product, by product category



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

In general, only a quarter of individuals with high education levels registered their product (25%), compared to a third of those with medium or lower education levels (34% each) – suggesting that education is not a barrier to product registration.

Product registration sees an upward trend with age. Less than a fifth of 18 to 29 year olds registered their product (17%), a quarter of 30 to 49 year olds (26%), over a third of 50 to 64 year olds (36%) and almost half of those aged 65+ (46%). To some extent, this may be due to the types of product purchased across age – for example, those aged 18 to 29 are the least likely to purchase white goods (4%), with purchase rising steadily to a high of 13% for individuals aged 65+.

However, younger respondents who did purchase white goods are less likely to register them than any other age group who made the same purchase (36%, 55% for those aged 30 to 49, 63% for those aged 50 to 64, 70% for those aged 65+) – thus the lower levels of product registration amongst younger respondents are not solely due to the categories of product purchased. Similarly, there is no significant difference between younger respondents who live in rented accommodation compared with those that own their own home – they are consistently less likely to register products than older counterparts.

Although, in the general population those people who own their home (37%) are more likely than those who rent their home (25%) to say they did register their product.

The main reason for registering products is to validate a warranty (73%). Product safety is second priority when it comes to product registration, with two-fifths of individuals registering their product so that the manufacturer can let them know if there are any problems (43%).

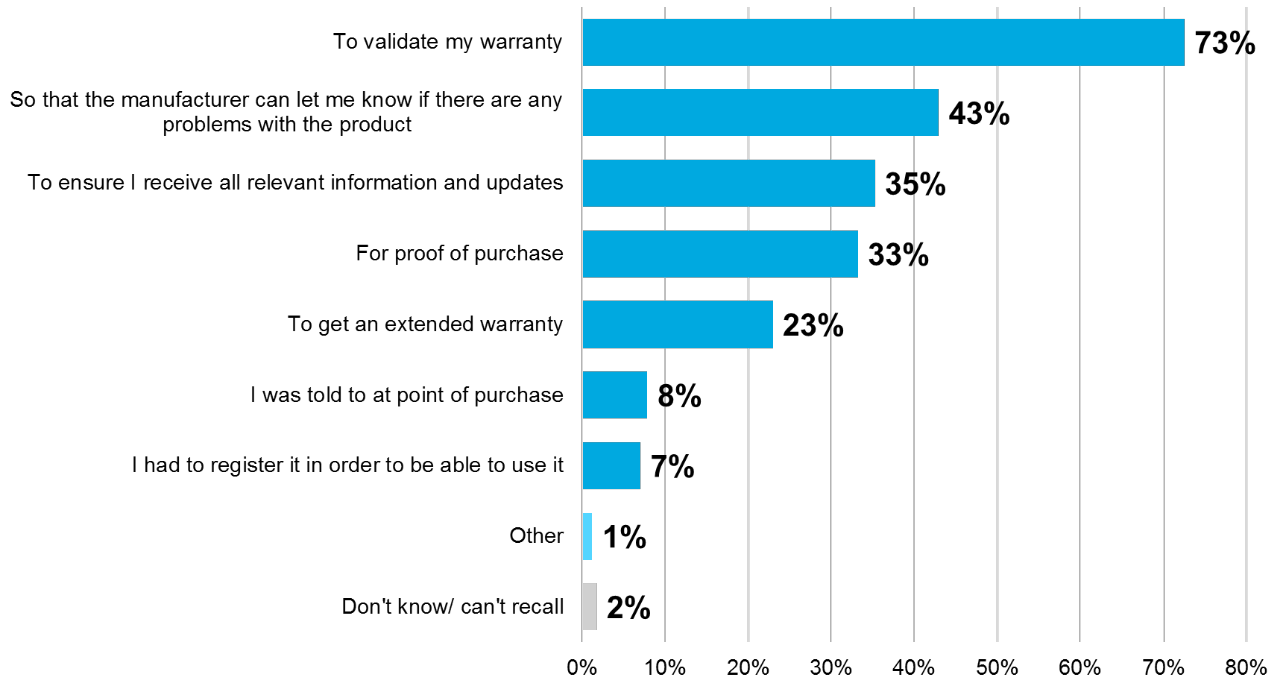
> *"I always register electronic products for the warranty in case something goes wrong you can go back to the manufacturer because some online retailers are useless handling customer complaints especially later on" (Has experienced issues)*

Offline adults are less likely to register a product in order to validate a warranty (66%), in order to get an extended warranty (29%), or because they were told to at the point of purchase (32%).

Two fifths registered a product so that the manufacturer could get in touch if there were problems (39%) – broadly consistent with the general population.

There is a clear upward trend by age for registering their product in order to validate their warranty (47% of 18 to 29 year olds vs 86% of 65+) or so that the manufacturer can get in touch if there are problems (21% of 18 to 29 year olds vs 60% of 65+). However, there is the opposite when it comes to registering the product because they were told to at the point of purchase, with older respondents much less likely to do so than younger respondents (16% of 18 to 29 year olds vs 10% of 65+). Younger respondents are also more likely to register in order to be able to use the product (20% 18 to 29 year olds vs 2% 65+). These trends are consistent even after considering the differences across product categories – older respondents who did purchase an electrical good are less likely than younger respondents to register it in order to use the product (6% vs 29%).

Figure 33: Reasons for registering product



Q: Which, if any, of the following are reasons you registered the [product]?
Base: All who registered their eligible product (n=1,044)

Those who purchased white goods were the most likely to register in order to let the manufacturer contact them in case of problems (51%) compared to only three in ten of those who purchased sports/ leisure products (30%). Those who purchased sports/ leisure products were more likely to register their product for proof of purchase (47%).

Figure 34: Top three reasons for registering a product, by product category

White goods	Electrical appliances	Baby products	Sports and leisure items	Furniture/ furnishings
To validate the warranty **82%**	To validate the warranty **70%**	To validate the warranty **63%**	To validate the warranty **64%**	To validate my warranty **59%**
So the manufacturer can let me know if there are any problems **51%**	To ensure I receive relevant information and updates **44%**	So the manufacturer can let me know if there are any problems **45%**	For proof of purchase **47%**	So the manufacturer can let me know if there are any problems **33%**
For proof of purchase **35%**	So the manufacturer can let me know if there are any problems **40%**	To ensure I receive relevant information and updates **42%**	To ensure I receive relevant information and updates **34%**	For proof of purchase **28%**

Q: Which, if any, of the following are reasons you registered the [product]?

Base: All who registered their eligible product (n=1,044)

The majority of product registrations are carried out online – either on the manufacturer's website (44%) or the retailer's website (28%). A small proportion of individuals registered their product by phone (9%), app (5%), post (4%) or in-store (3%). White goods are the most likely product category to be registered by phone (15%) while furniture/ furnishings are the most likely to be registered in store (13%).

Younger respondents aged 18 to 29 are the most likely to register their product via an app (10%) and the least likely to register on the manufacturer's website (27%). Registering a product over the phone is more common for BAME respondents (16%), those with low education levels (11%) or those on low incomes (12%).

Offline consumers are more likely than the general population to register their product by post (27% vs 4%), in-store (25% vs 3%) or over the phone (17% vs 9%).

A small number of offline respondents did register their product online, but were much less likely to than the general population (19% vs 74%).

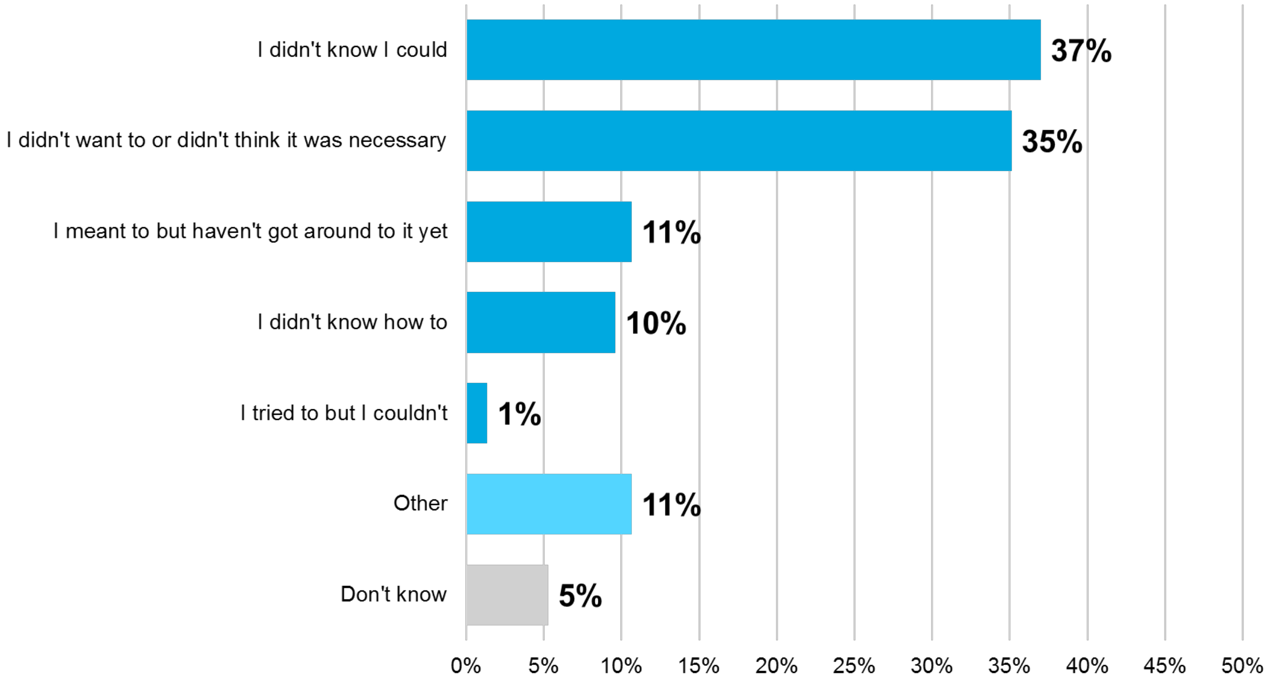
The overwhelming majority of those who registered their product found the process easy. Over nine in ten said it was easy, although this drops to around four-fifths of those who bought and registered a sports and leisure item (82%).

Reasons for not registering products

Amongst those who did not register their product, over a third did not know they could (37%) or did not want to/ did not think registration was necessary (35%). One in ten did not know how to register their product (10%) and a similar proportion simply had not got around to it yet (11%).

Individuals who purchased baby products are the most likely to say they did not know they could (51%) while those who purchased sports and leisure items are the most likely to not think it necessary (45%) and those who purchase white goods the most likely to say they had not got around to it (37%).

Figure 35: Reasons for not registering an eligible product

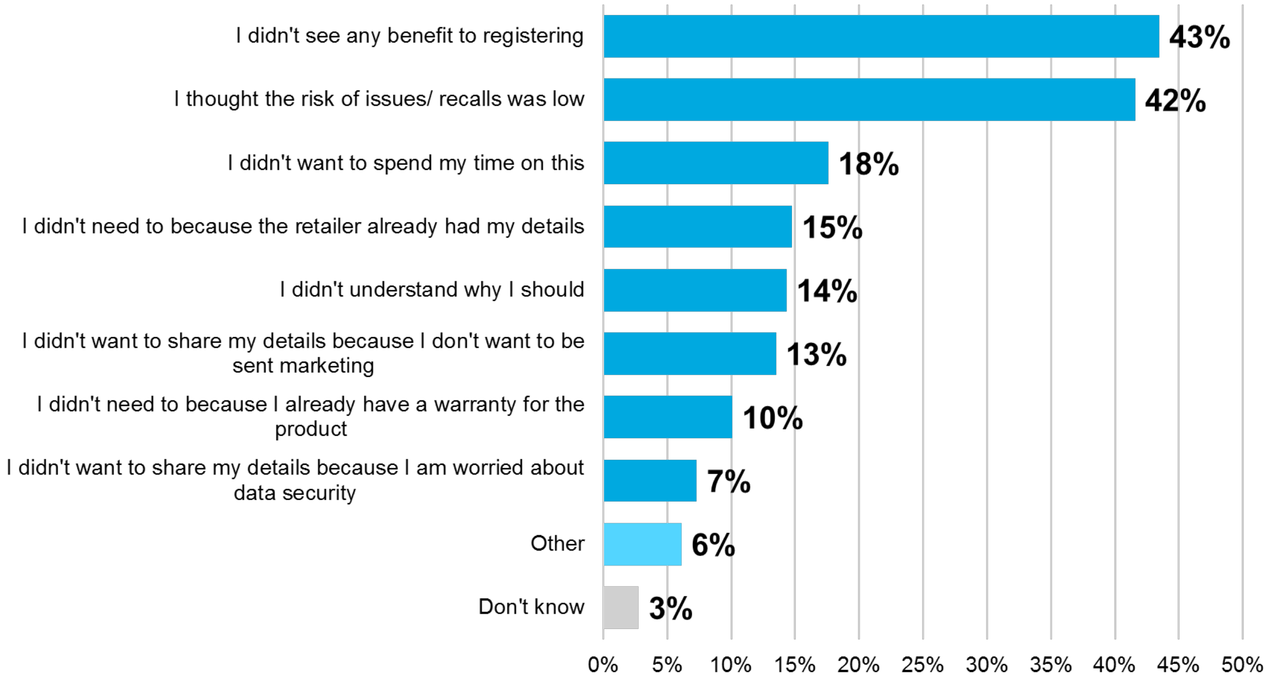


Q: You said you didn't register the [product] when you bought it. Which, if any, of the following are reasons for this?
Base: All who did not register product (n=2,093)

Those who did not want to register their product or did not think it necessary to do so were asked their reasons for this – the most common answers are that there were no benefits to doing so (43%) or thinking the risk of issues was low (42%). Just under a fifth did not want to spend time registering products (18%), while around one in seven cited not needing to because the retailer had their details (15%) or not understanding why they should register their product (14%). A small proportion did not want to share details, either because they did not want to be sent marketing (13%) or because they worry about data security (7%).

Individuals who purchased and did not want to/ did not think it necessary to register white goods were the most likely to say that they did not need to register because they did not want to be sent marketing (27%) or because they already had a warranty for the product (24%). Over a quarter of those who purchased and did not want to/ did not think it necessary to register baby products said they did not understand why they should (28%).

Figure 36: Reasons for not wanting to register product/ not thinking registration necessary



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

Looking ahead, three-fifths of those who did not register their purchase say that clearer guidance would make them more likely to register products in the future (60%). Around three in ten say that specifically clearer guidance on how to register (34%), clearer guidance from the manufacturer on the benefits (31%), or clearer guidance from the retailer on the benefits would make them more likely to register a product in the future. A smaller proportion say that clearer guidance from the government on the benefits of registering a product would make them more likely to do so (15%).

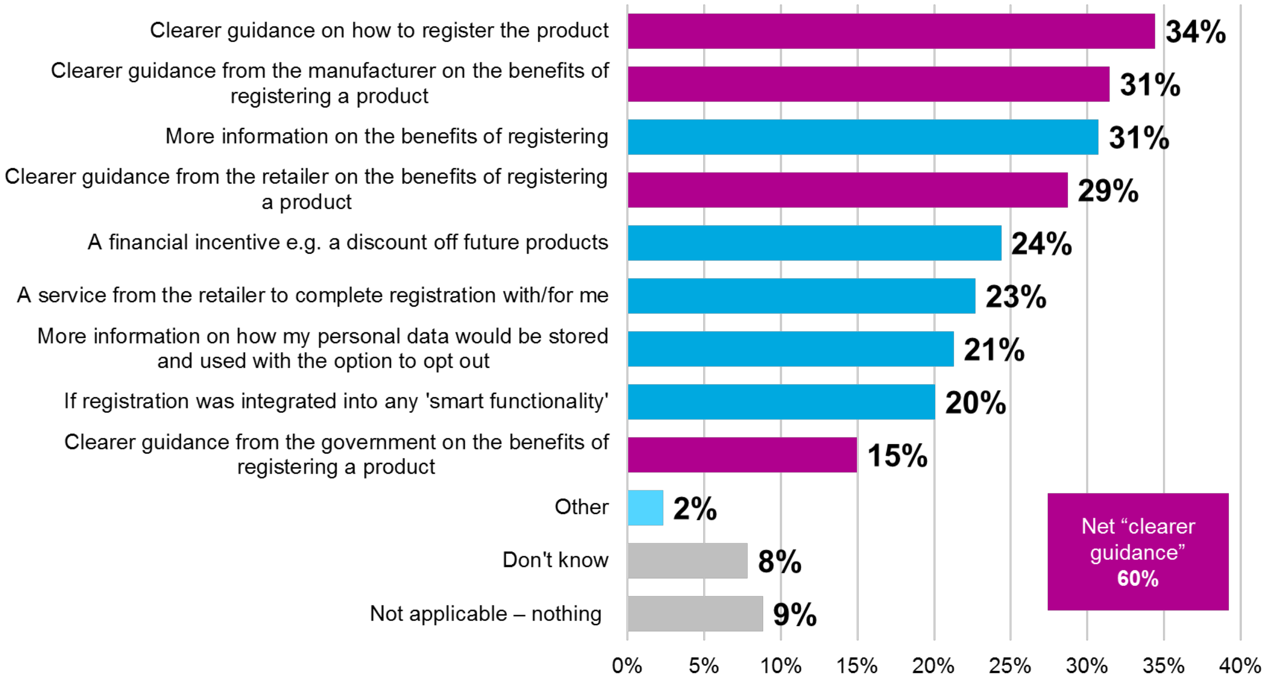
Offline consumers are more likely than the general population to say that nothing would make them more likely to register their products in the future (28% vs 9%), with a particular lack of interest in registration integrated with any 'smart' functionality (4% vs 20%).

Those who purchased and did not register baby products are the most likely to want clearer guidance on how to register the product (40%), while those who purchased and did not register white goods want a service from the retailer to complete registration for them (27%).

There is a declining trend across age for interest in guidance for how to register products; from two-fifths of 18 to 29 year olds (39%), a third of 30 to 49 year olds (35%), to three in ten of 50 to 64 year olds (31%) and those aged 65+ (30%). This suggests that advice and guidance is most necessary for those who have less experience registering various products over a lifetime.

Younger respondents aged 18 to 29 are also the most likely to want clearer guidance from a retailer on the benefits of registering a product (33%) while respondents aged 65 and over are more likely to want this guidance to come from the manufacturer (39%).

Figure 37: Would encourage registration of products in future



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

Conclusions

This important research builds upon previous research undertaken in the product safety policy area and benchmarks where the UK public stand on a range of issues related to product safety.

The UK public have clear expectations about what roles the Government and manufacturers should play in the product safety system. The UK public feel Government is most responsible for setting product safety requirements. Manufacturers are seen as being responsible for ensuring that a product meets the legal safety requirements and to resolve any product safety issues.

Overall, over half of the UK public feel that the UK's regulatory system ensures the products they purchase are safe and three quarters agree that products sold in the UK are generally safe as there are regulations in place to ensure that. In contrast, the UK public are less trusting of other nations when it comes to the perceived safety of the products they manufacture.

Perceptions of product safety are generally very high and that may explain why product safety ranks relatively low (10th out of 16 factors) as an important factor when purchasing a product. However safety is much more likely to be a consideration when buying baby products and toys.

Perceptions of safety are often dependent on past experiences with products. Individuals who have experienced product issues are more concerned about the safety of certain products, whereas those without prior experience felt that standards have improved in recent years.

The proportion of people who experience safety issues with products they purchased in the last six months is low, at less than one in ten people. Where people do face a safety issue with a product, three quarters of them take some form of action, with this most likely to be returning the item for a refund or exchange.

Product recalls for products people own are similarly rare as experiencing safety issues. When thinking generally the UK public would most like to be contacted directly by the manufacturer or the seller when a product needs to be recalled. However, those people who have direct experience of a product recall most commonly report that they found out through the media first and a smaller minority report being contacted directly by the manufacturer.

Product registration varies by product type. Overall, three in ten of those who bought products that could be registered did register them and that increases to six in ten of those people who bought white goods. There is also a clear upward trend of registering products as age increases, regardless of the product purchased.

Although the vast majority of those who do register products find that process easy, clearer guidance on how to register the product or what the benefits are would encourage people to register their products in the future - with younger respondents particularly in need of guidance.

This research explored in more detail the experiences and perceptions around online shopping and in particular the growth of online marketplaces. Compared with other online channels (such as online retailers of a range of products) there is greater uncertainty about whether products bought from Amazon marketplace or other online marketplaces are safe. Geography is also a factor, the UK public is more likely to be concerned about the safety of products from outside of the EU/ UK bought through an online marketplace than they are with products from within the EU/UK.

Throughout this research delving behind the headline findings we uncover different experiences by consumers of varying socio-economic characteristics. In particular, age is an influential factor in how people perceive and experience the UK product safety system. The trust younger consumers have in product safety is less likely to be influenced by quality marks and previous experiences and much more influenced by social interactions and online reviews. Younger consumers' lack of experience also manifests itself in them being less likely than older consumers to understand their rights and responsibilities when they have experienced a product safety issue.

The experiences of consumers from different demographics is an important area to explore further and this robust and large dataset provides many opportunities to compare and contrast the experiences of different groups in the UK population.

Appendix A: Topical Spotlights

In order to include a range of topical policy areas while maintaining respondent engagement, participants to the online survey were shown a random selection of topical modules. The overall sample was randomly shown three modules out of six: country of origin labelling, furniture labelling, fireworks, inclusive design, magnets, and COVID-19 face coverings.

Country of origin labelling

Respondents were asked a selection of questions around product labelling and country of origin. They were asked to think about this in relation to a product they had bought within the past 6 months[10].

Overall, respondents most commonly report that labels stating a product has been ‘Made in the UK’ make them more likely to purchase their product (60%), including a third (32%) stating it would make them much more likely to purchase. Comparatively, although over a third (35%) report a ‘Made in the EU’ label would make them more likely to purchase a product, only 9% report it would make them much more likely. Likelihood declines significantly for products with ‘Made in China’ and ‘Made in India’ labels (2% and 3% respectively).

Half of respondents report that ‘Made in China’ (51%) or ‘Made in India’ (47%) labels would make them less likely to purchase a product, although the absence of any country of original label has the most detrimental effect to purchase intent, with 54% of respondents reporting it would make them less likely. These responses are generally driven by respondents aged 65 and over who are significantly more likely than any other age group to report they would be less likely to purchase products made in other countries over three in five reporting this for India (63%) and China (65%).

Despite this, considerable proportions across all label types report the country of origin making no difference to their purchase decisions. Across all countries, those aged 18 to 29 are the most likely to report that a label would make no difference to their purchase decisions, and report significantly higher incidences of this than any other age group for the UK (42%), China (54%), India (58%) or no country original label (58%).

Participants in the qualitative research considered where the product they are purchasing is from when determining product safety. There are varying levels of trust depending on the country. There was a preference for primarily buying British products due to standards for product manufacturing; generally buying from European nations was felt to be trustworthy due to EU standards, whereas China was looked upon negatively when it comes to product safety standards, with the perception that manufacturing laws were more lax.

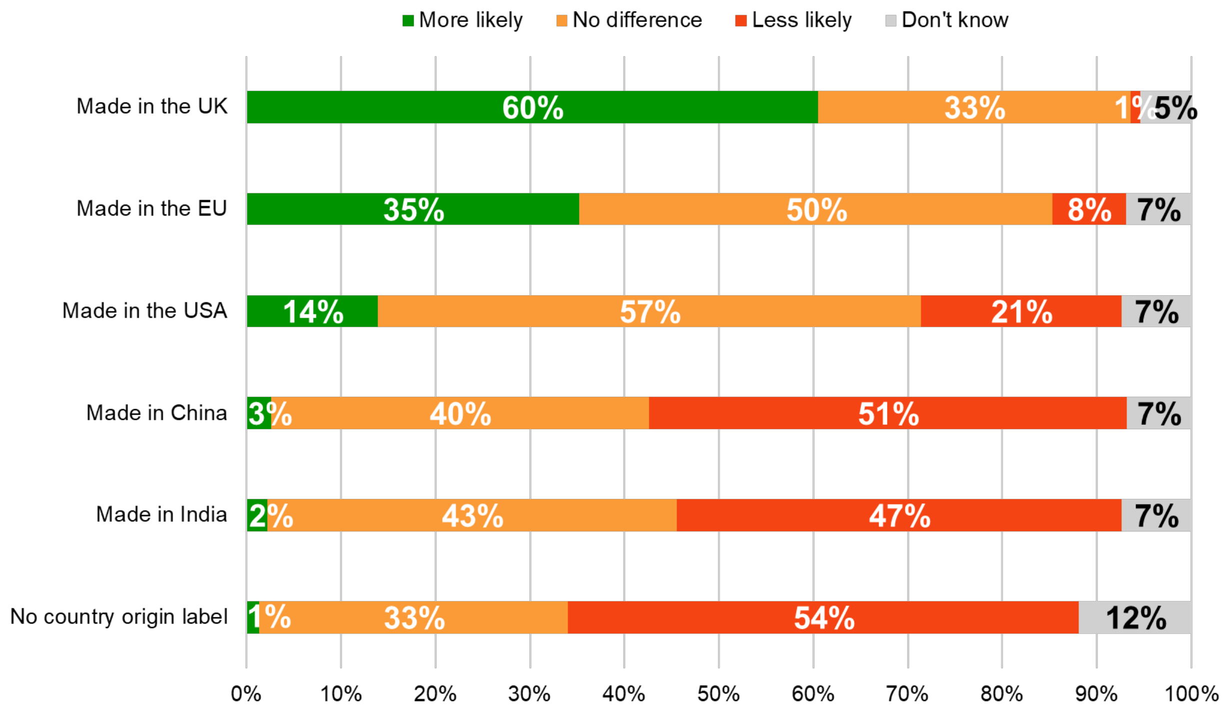
[10] Respondents were previously asked to identify products they had purchased in the last 6 months. From their selection they were randomly allocated a relevant product to think about for this module in the survey.

"I feel like items that are mass manufactured i.e. in China, etc. may not have the same standards as UK/Europe" (Has experienced issues)

"I would be dubious about buying from some countries. Not just for safety, but also for quality" (Has experienced issues)

"I definitely feel safer under current EU reg. for products" (Has experienced issues)

Figure 38: Impact of country of origin label on purchase decision



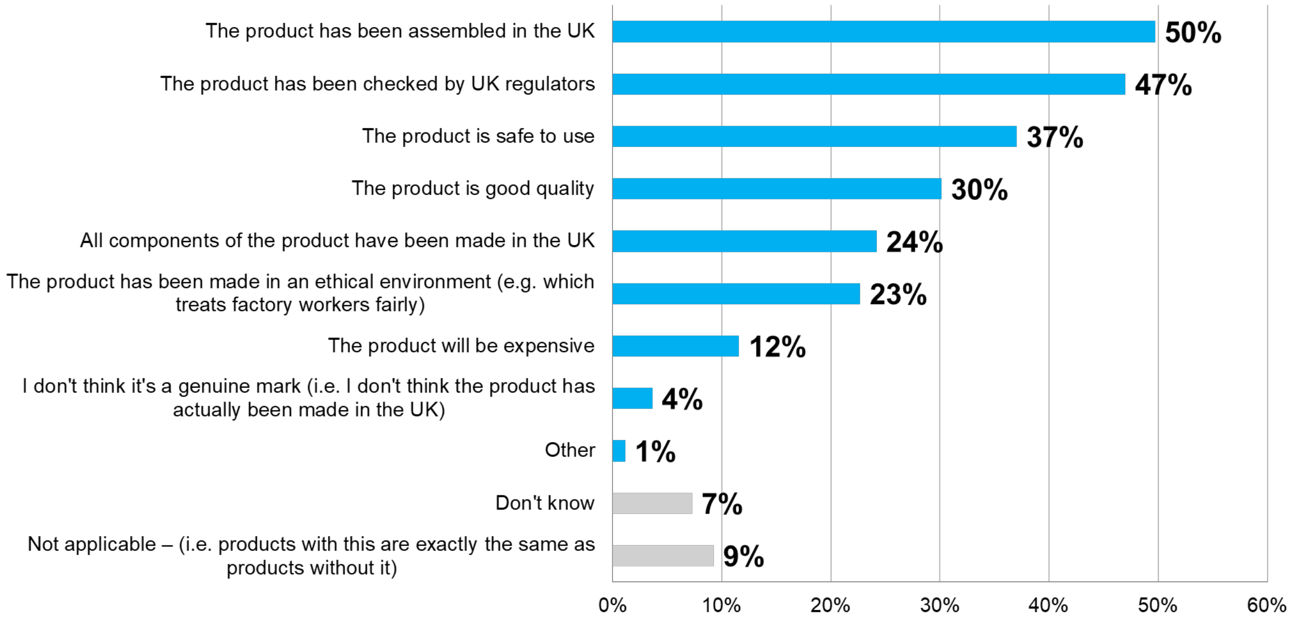
Q: To what extent, if at all, would seeing each of the following on a labelling/ packaging impact your decision to buy that product?
Base: All respondents [in product labelling section] (n=3,403)

Those who were asked about baby products, cosmetics and white goods are the most likely to report being deterred by 'Made in India' and Made in China' labels.

Offline consumers are more negative than the general public about products made in the EU – only a fifth say a 'Made in the EU' label would make them more likely to purchase a product (18%) and over a quarter say it would make them less likely to do so (27%).

Half of respondents report that 'Made in the UK' labels or packaging mean that a product has been assembled in the UK (50%) or it has been checked by UK regulators (47%). This latter definition is most commonly cited by those who were allocated white goods (55%), baby products (54%) or electrical appliances (51%).

Figure 39: Meaning of 'Made in the UK' label



Q: When you see "Made in the UK" on labelling/ packaging, what does it mean to you?
Base: All respondents [in product labelling section] (n=3,403)

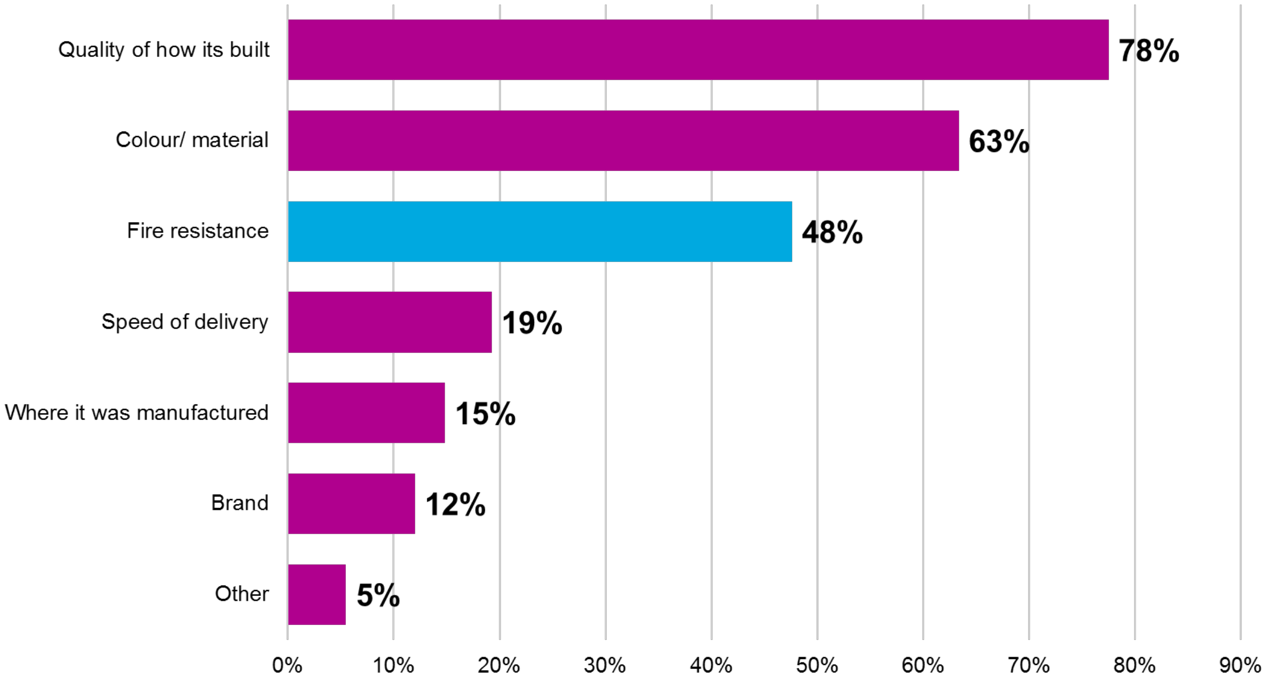
A small minority (4%) report that they do not think 'Made in the UK' is a genuine mark while almost one in ten (9%) report that it is not applicable (i.e. products with this are exactly the same as products without it). Younger respondents are most likely to report that it is not applicable; close to a sixth (15%) of 18 to 29 year olds report this.

Furniture labelling

When asked to exclude price and size, half (48%) of the UK public feel that fire resistance of upholstered furniture is an important purchase consideration. Those who had purchased an item of furniture in the last six months were less likely than average to say the fire resistance is an important consideration (43%). There is an upward trend by age for considering fire resistance important – only 28% of those aged 18 to 29 think it is important, compared to 69% of those aged 65+, and this is consistent regardless of whether they had bought furniture in the past six months.

Overall, the most important factors considered when buying upholstered furniture are the quality of how it is built (78%) and the colour/ material (63%). Those who purchased an item of furniture were more likely to cite these and speed of delivery than those who had not purchased any furniture.

Figure 40: Most important factors when purchasing an item of upholstered furniture

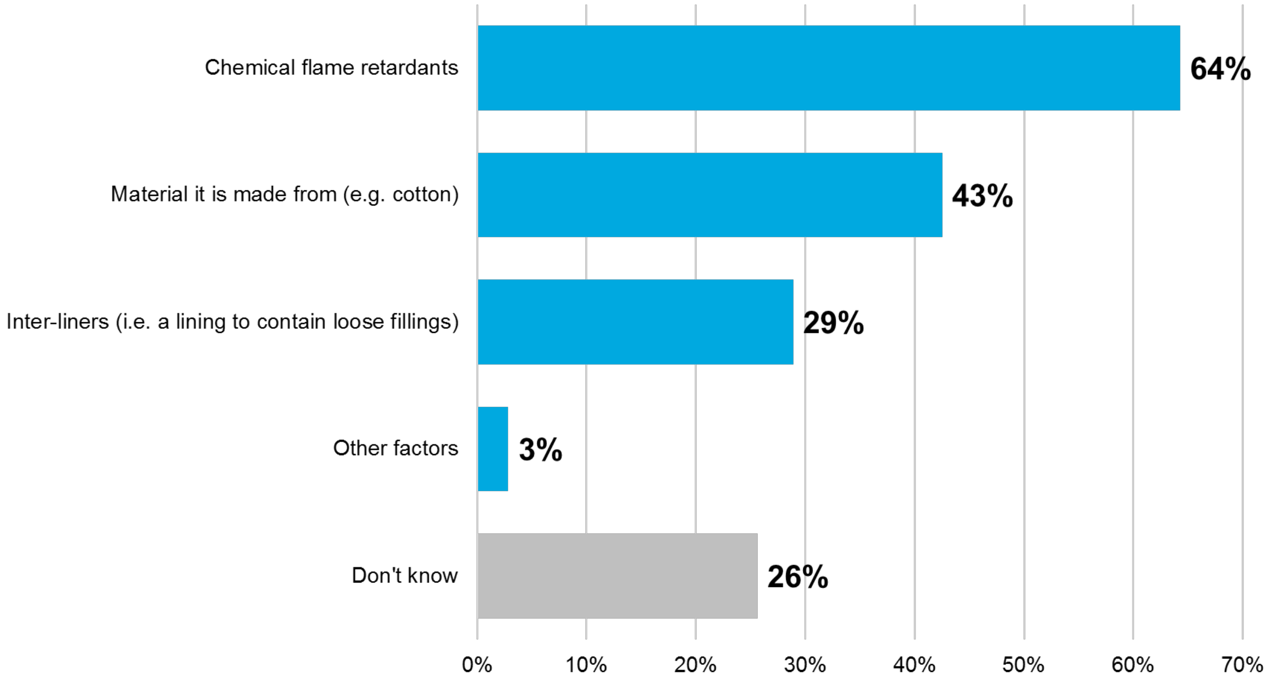


Q: For the following question, please do NOT consider the price or the size of the furniture… Which of the following factors are the most important to you when buying an item of upholstered furniture (e.g. a sofa)? (Please select up to 3 options)
Base: All respondents [in furniture labelling section] (n=3,411)

With specific regard to fire safety, 64% of the UK public think that chemical flame retardants ensure that upholstered furniture meets fire safety requirements. A further 43% think that the material upholstered furniture is made from ensures it meets fire safety standards.

It should be noted that a quarter (26%) of the UK public don’t know what ensures that upholstered furniture meets fire safety standards. Younger consumers (aged 18-29 years old) are more likely than older consumers (aged 65+) to not know what ensures that upholstered furniture meets fire safety standards (38% vs 17%).

Figure 41: Factors that mean that upholstered furniture meets fire safety requirements



Q: Which, if any, of the following do you think ensures your upholstered furniture meets fire safety requirements?
Base: All respondents [in furniture labelling section] (n=3,411)

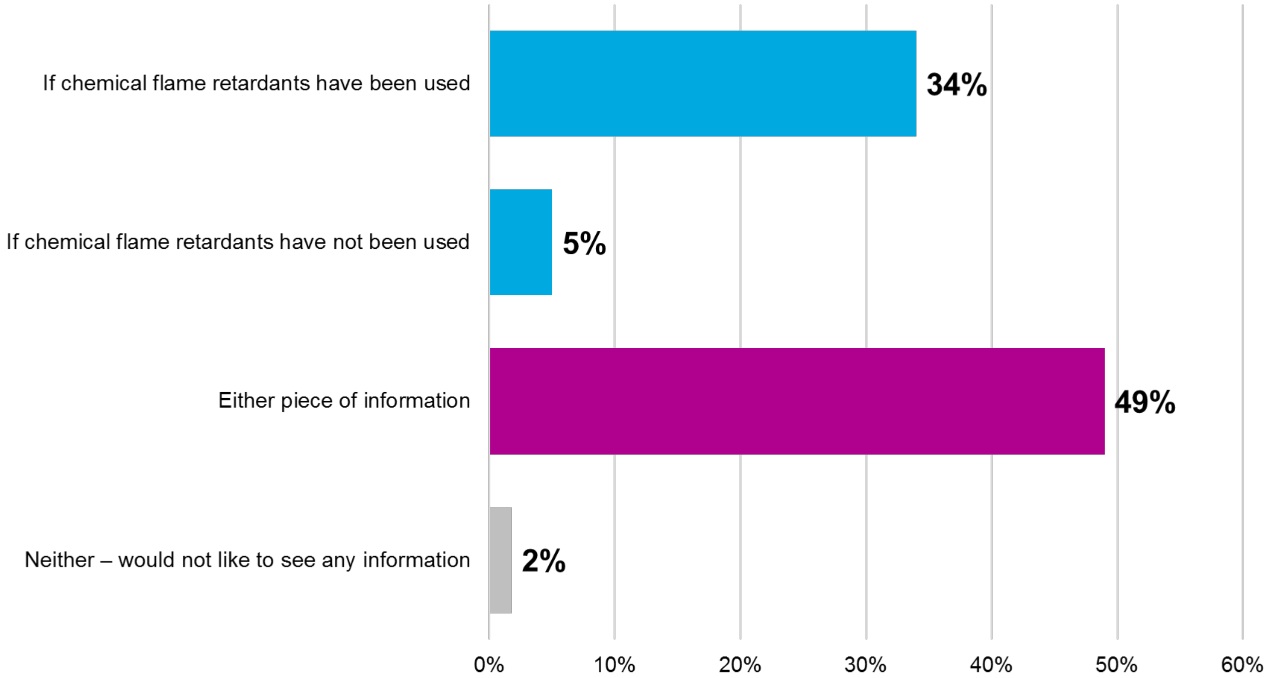
Seven in ten (70%) of the UK public are aware that upholstered furniture usually comes with chemical flame retardants. Awareness varies by demographics, with younger respondents least likely to be aware (46% 18 to 29 year olds, compared to 83% of 65+ year olds). White respondents are more likely than BAME respondents to be aware that upholstered furniture includes chemical flame retardants (72% vs 55%).

The offline population is less likely than the general population to be aware that upholstered furniture usually comes with chemical flame retardants, with 59% aware compared with 70% of the general population.

Among those aware that upholstered furniture includes chemical flame retardants, very few have ever specifically looked for items without chemical flame retardants with one in ten who have looked for beds (8%), baby products (7%), sofas/ armchairs (10%) or other upholstered furniture (8%).

The UK public are generally ambivalent regarding what information on chemical flame retardants they would like to see, with half (49%) saying they would like to see either piece of information. A third (34%) would prefer knowing if chemical flame retardants have been used, while only 5% definitively prefer to be informed if they have not been used. A small minority (2%) would not like any information on chemical flame retardants.

Figure 42: What information relating to chemical flame retardants people would like to see?



Q: When thinking about fire safety information on furniture, which of the following pieces of information relating to chemical flame retardants would you like to see?
Base: All respondents [in furniture labelling section] (n=3,411)

A similar pattern is seen with general fire resistance information - 43% wanting to know whether a product is fire resistant and only 7% preferring to be informed if the furniture is not fire resistant. A very similar proportion (42%) would be happy to see either piece of information about fire resistance. Only a very small minority (2%) do not want to have any information about the fire resistance of their furniture.

> The offline population is much more likely than the general population to want to see whether a piece of furniture uses chemical flame retardants (54% vs 34%) or if it is fire resistant (81% v 43%).

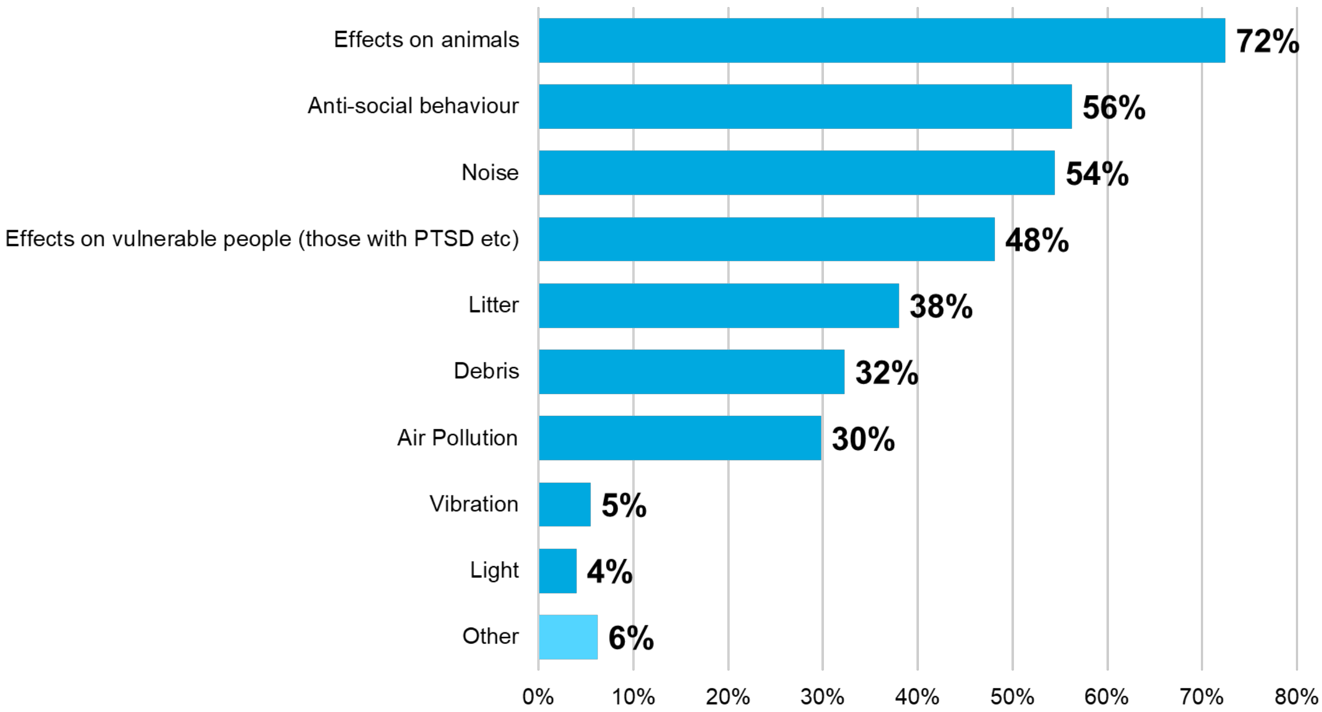
Fireworks

Respondents were asked a series of questions regarding fireworks, their enjoyment of them, and their perceived safety.

There is a relatively even split across the UK public when looking at the enjoyment of fireworks; just over half (55%) report they enjoy fireworks, compared to 43% of the public who do not. Younger respondents are significantly more likely to report enjoying fireworks, with three fifths (61%) of 18-29 year olds reporting this, compared to 47% of those aged over 65. Likewise, respondents with at least one child in the household are significantly more likely to report enjoying fireworks (61%) than those without any children (53%).

For those who do not like fireworks, the effects on animals is cited as the top reason, with close to three quarters (72%) citing this. This is followed by just over half of this group reporting anti-social behaviour (56%) and noise (54%).

Figure 43: Reasons for not enjoying fireworks



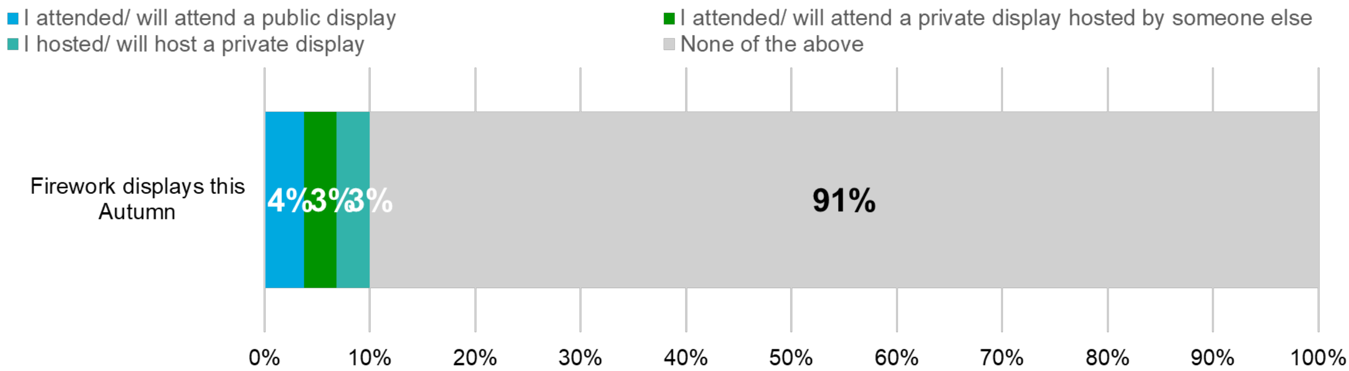
Q: What is it that you do not like about fireworks?
Base: All who don't completely enjoy fireworks [in fireworks section] (n=2,681)

Respondents living with a disability are significantly more likely than those without a disability to report not enjoying fireworks (52% vs 39% respectively). Alongside this they are also significantly more likely to select every reason with the exception of light and litter. Most notably, over half of those living with a disability who do not like fireworks cited 'effects on vulnerable people' (56%), compared to 45% of those without a disability.

Offline adults are less likely than the general public to say they enjoy fireworks (39% vs 55%). Most reported the effect on animals as a reason for disliking fireworks (47%). Two fifths (41%) stated ‘other’ reasons for disliking fireworks, such as them being ‘dangerous’ or a ‘waste of money’.

Fieldwork was undertaken during the national lockdown in November, as a result incidence of respondents attending or hosting a fireworks display is, expectedly, low. The vast majority of respondents this year report neither attending or hosting a firework display in 2020 (91%), while 9% report attending or hosting a display.

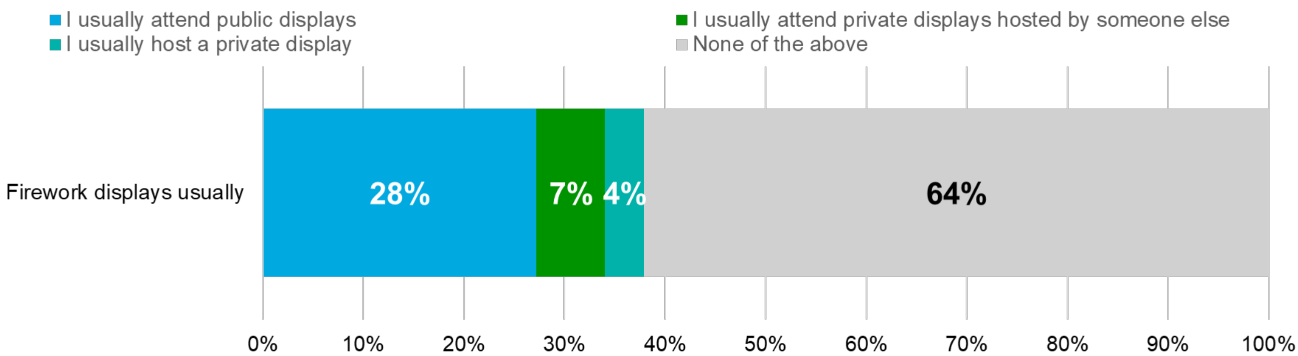
Figure 44: Firework display attendance – 2020



Q: Thinking about fireworks displays this autumn (e.g. for Diwali, Bonfire night), which of the following apply to you?
Base: All respondents in fireworks module (n=3,418)

Comparatively, when thinking about usual behaviour, overall slightly more than a third (36%) of respondents report usually attending or hosting a fireworks display. This is driven by just over quarter (28%) reporting they attend a public display, while 4% would usually host a private display.

Figure 45: Firework display attendance usually

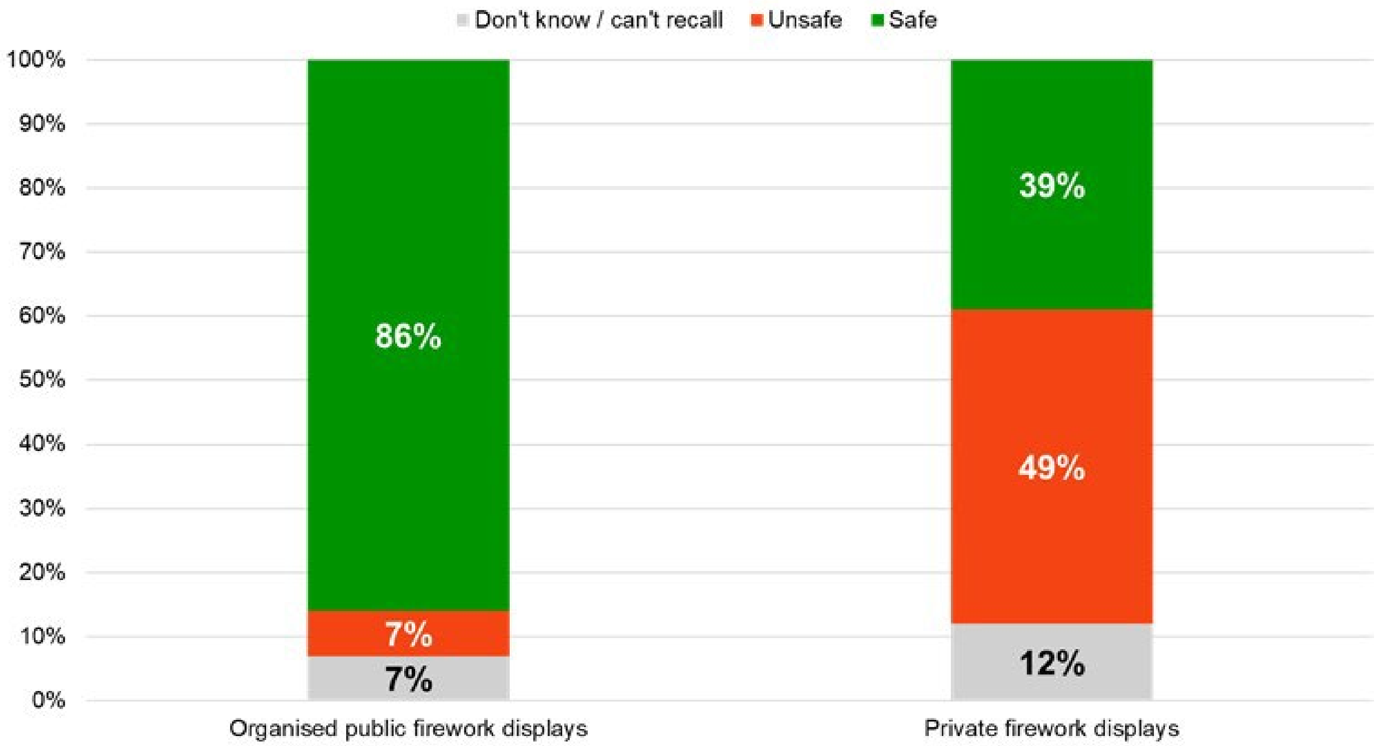


Q: And thinking about what you usually do for autumn firework displays (e.g. for Diwali, Bonfire night), which of the following apply to you?
Base: All respondents [in fireworks section] (n=3,418)

Over half (54%) of respondents who don’t enjoy fireworks reported noise as a reason for this. Likewise, respondents who would host a display are more likely to report preferring to purchase quiet fireworks (44%) compared to loud (39%). However, for just under a sixth (14%) of respondents, noise is not a consideration in their purchases.

Overall, of those who had attended a public firework display, most report that it was safe (86%), compared to 7% who report it was unsafe. Comparatively, three in ten (39%) reported the last private firework display they attended was safe, compared to nearly half (49%) who felt it was unsafe.

Figure 46: Safety of last firework display attended



Q: Thinking about the last fireworks display you attended of each of the following types... Overall how safe, if at all, do you think the fireworks display was?
Base: All respondents who had attended a fireworks display [in fireworks section] (attended a public display=2,972; attended a private display=2,657)

Those who enjoy fireworks are significantly more likely to report that the last firework display they attended was safe, compared to those who do not like fireworks: for public displays, over nine in ten (93%) respondents who enjoy fireworks report the last display they attended was safe, compared to 78% of those who do not enjoy fireworks. Comparatively, for private displays, 49% of those who enjoy fireworks felt their last display was safe, compared to 24% of those who do not.

Younger respondents are the most likely to report thinking their most recent display was safe: nearly nine in ten (87%) of 18 to 29 year olds reported the last public display they attended was safe, compared to 83% of those aged 65 and over.

Large crowds and not having enough space to stand far enough away from fireworks and bonfires are commonly reported as reasons for both public and private displays not being safe. Likewise, falling debris from fireworks and or fireworks being set off towards the crowds is commonly mentioned. For those who reported a private display was unsafe, many mentioned untrained operatives or people not using fireworks correctly.

Respondents were shown a recent campaign from OPSS[11] and were asked if they recalled seeing any similar adverts about fireworks in the past three months. Just over one in ten (12%) remember seeing a campaign advert around fireworks in the past three months.

Inclusive design

Inclusive design is the design of mainstream products and/ or services that are accessible to, and usable by, as many people as reasonably possible without the need for special adaptation or specialised design. Just over a third of individuals think that inclusive products are widely available (35%), although half neither agreed nor disagreed (51%). Similarly, almost two-fifths think that inclusive products cost more than non-inclusive products (38%), but over half are uncertain (55%).

Older respondents are more likely to be uncertain about whether inclusive products are widely available (60%). Younger respondents are the strongest in their answers – with those aged 18 to 29 the most likely to both agree (45%) or disagree (10%) that inclusive products are more expensive, and the least likely to be uncertain (45%). BAME individuals were more likely to think that inclusive products are widely available (40% vs 34% from White backgrounds) and that inclusive products are more expensive than non-inclusive products (44%).

Disabled respondents are more likely to say that inclusive products cost a lot more than non-inclusive products (42% vs 37% non-disabled). Individuals whose daily activities are limited a lot by a health condition or disability are more likely than non-disabled respondents to strongly agree that inclusive products cost a lot more than non-inclusive products (13% vs 7%) but also more likely to strongly agree that inclusive products are widely available (9% vs 6%).

When purchasing products, the vast majority of individuals can easily find products that they can use/ operate easily (89%). However, one in six of disabled respondents (17%) and a fifth of those whose day-to-day activities are limited a lot say it is difficult to find products they can use (20%), compared to just one in ten non-disabled respondents (9%).

Offline consumers are more likely than the general population to say that inclusive products are widely available (60% vs 35%) and that inclusive products cost more than non-inclusive products (57% vs 38%).

A quarter of offline consumers also say it is difficult to find products they can use/ operate easily (25%).

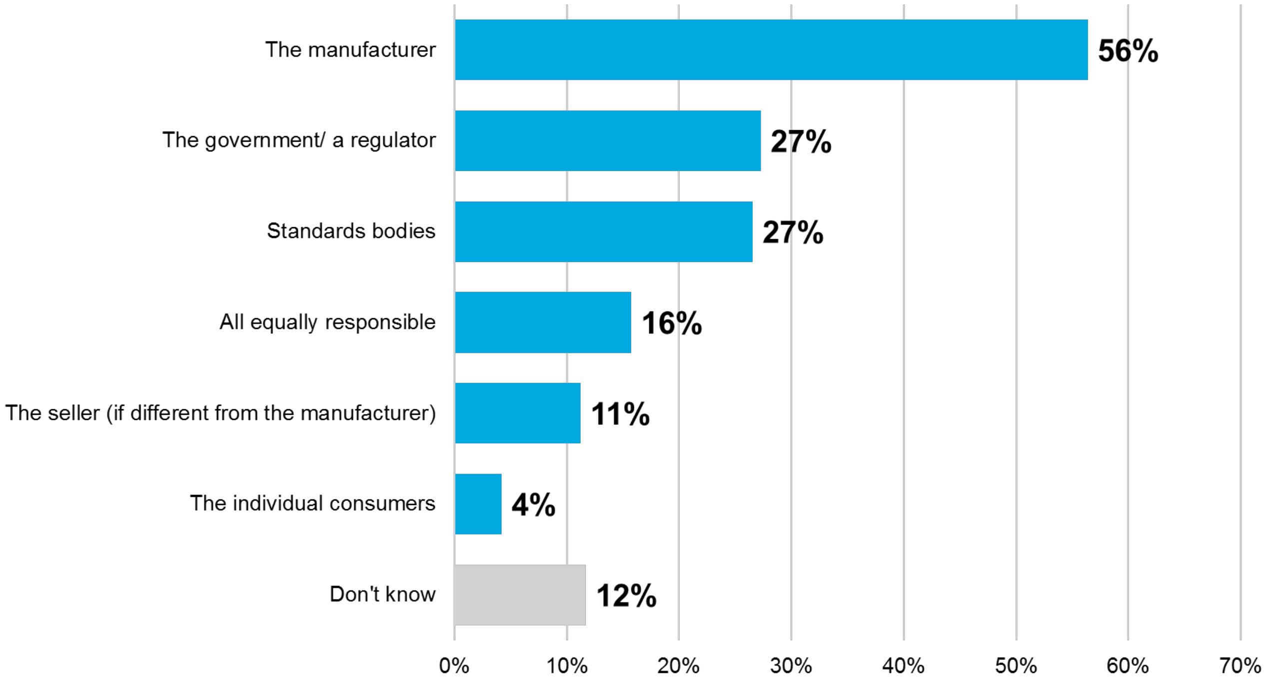
In terms of ensuring products are designed so that they are usable to a wide range of UK consumers with differing needs, over half place this responsibility with the manufacturer (56%).

[11] The campaign images shown to respondents can be found in the technical report

A quarter think the government/ a regulator or standards bodies should take responsibility (27% each) while one in six think all are equally responsible (16%).

Around a fifth of disabled respondents think that all the listed organisations are equally responsible for ensuring products are designed to be usable for a wide range of differing needs (20%). Those aged 65 and over are the most likely age group to think that all organisations are equally responsible (20%), compared to only 12% of those aged 30 to 49. There is also a marked difference by education level, with those who have high education levels more likely than those with medium or low education levels to think the manufacturer (61% vs 54% medium, 54% low), government/ regulator (34% vs 25% medium, 23% low) or standards bodies (32% vs 24% medium, 24% low) should be responsible.

Figure 47: Who has responsibility for ensuring products are designed so that they are usable to a wide range of UK consumers with differing needs



Q: Who do you think is responsible for ensuring products are designed so that they are usable to a wide range of UK consumers with differing needs?
Base: All respondents [in inclusive design section] (n=3,399)

In the qualitative research participants defined inclusive design as when an object is designed to be used by anyone, regardless of ‘ability’ as it considers all potential needs. Participants felt that inclusive design was widely available and tended to be subtle, objects are often designed to be adaptable therefore should not cost more, though they often do.

Ultimately the manufacturer was felt to be responsible for creating inclusive products, as it is in their interest to create and distribute inclusive products which are relevant to a wide range of society.

Though inclusive design was felt to be important most felt that it was not at the forefront of most companies’ minds, with only certain products being designed for certain disabilities.

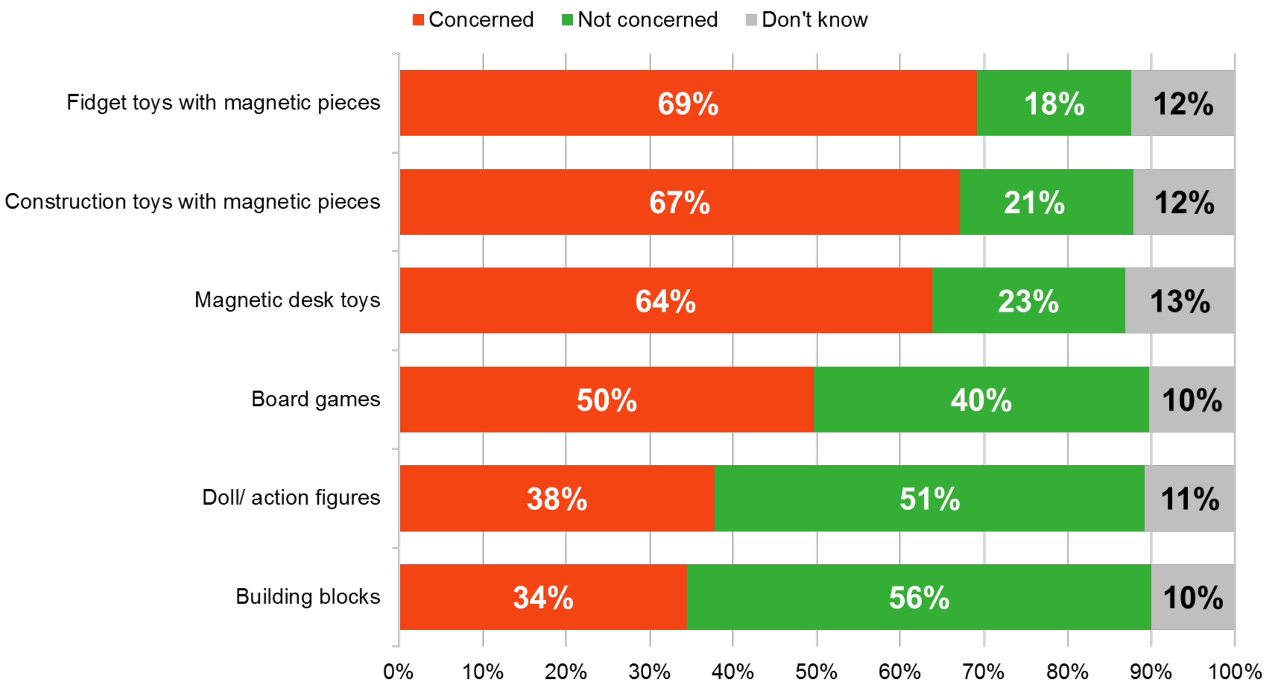
Certain products were less likely to be inclusive than others, buildings were not always felt to be inclusive and phones as well as cars were felt to be designed ‘for men’.

Magnets

Over two thirds would be concerned about whether fidget toys with magnetic pieces (69%) or construction toys with magnetic pieces (67%) are safe for a child under five to play with. Doll/ action figures (38%) and building blocks (34%) are the least concerning for a young child to play with.

Perhaps surprisingly, individuals with children in their household are more likely to be unconcerned about the safety issues each item presents to a child under five. Over a fifth are not concerned about safety issues from fidget toys (22%), a quarter are not concerned about construction toys or desk toys (26% each) and three-fifths are not concerned about safety issues presented by dolls/ action figures (58%) or building blocks (61%).

Figure 48: Safety concerns for a child under 5 to play with each item



Q: Thinking about the following types of toy, how concerned or not would you be that they are safe for a child under 5 to play with?
Base: All respondents [in magnets section] (n=3,399)

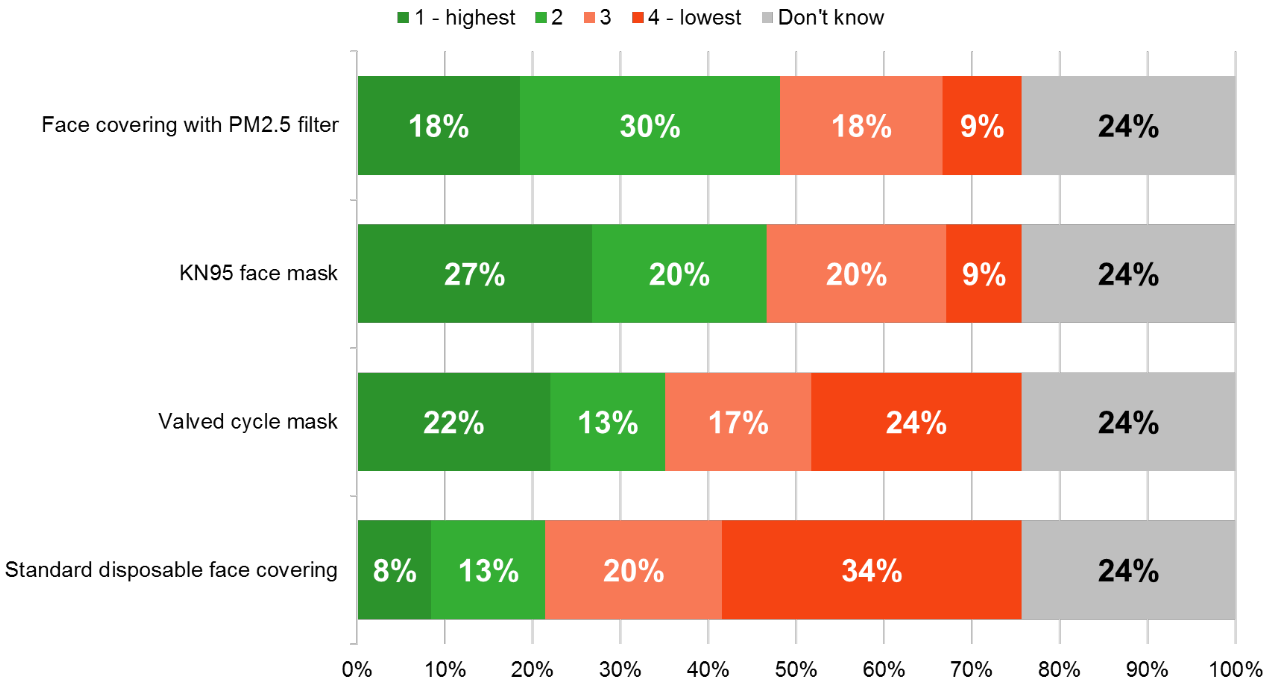
Those with children in their household were also the more likely than those without children to have purchased an item with magnetic pieces in the past six months (12% vs 3%). People with children in their household predominately bought children's construction toys (7%) although a few also bought fidget toys (3%) or desk toys (2%).

COVID-19 face coverings

Respondents were shown pictures of four types of face covering/ mask – coverings with a PM2.5 filter insert, a valved cycle mask, a standard disposable face covering, and a KN95 face mask (images provided in the technical report). When asked to rate the coverings in order of how much protection they offer the wearer from COVID-19, just over a quarter of respondents said that a KN95 mask offered the highest level of protection (27%).

In general, face coverings with PM2.5 filters and KN95 face masks are considered to offer a higher level of protection than other types of face covering. Less than one in ten (8%) said a standard disposable face covering offered the wearer the highest level of protection against COVID-19, with a third saying this offered the lowest protection of the four coverings presented (34%).

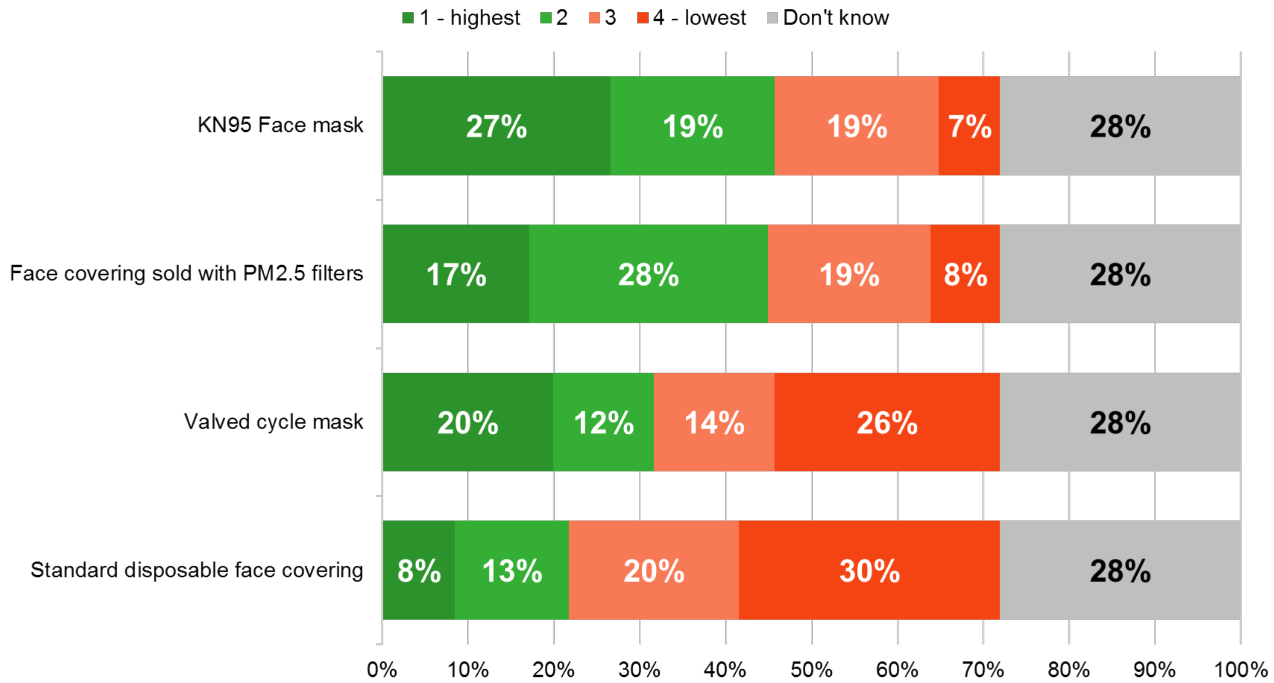
Figure 49: Protection offered by mask to the wearer



Q: Please rank the coverings/ masks in order from high to low of how much protection they would offer to the wearer from COVID-19, where 1 is the highest level of protection and 4 is the lowest
Base: All respondents [in COVID-19 section] (n=3,421)

A similar pattern is seen when respondents were asked to rate how much protection the face coverings offer to other people in close contact to the wearer. The KN95 face mask is considered as offering the highest level of protection, while a face covering with PM2.5 filters offers comparable protection at the two highest levels. A standard disposable face covering is seen as offering the lowest level of protection of the four masks ranked.

Figure 50: Protection offered by mask to people close to the wearer



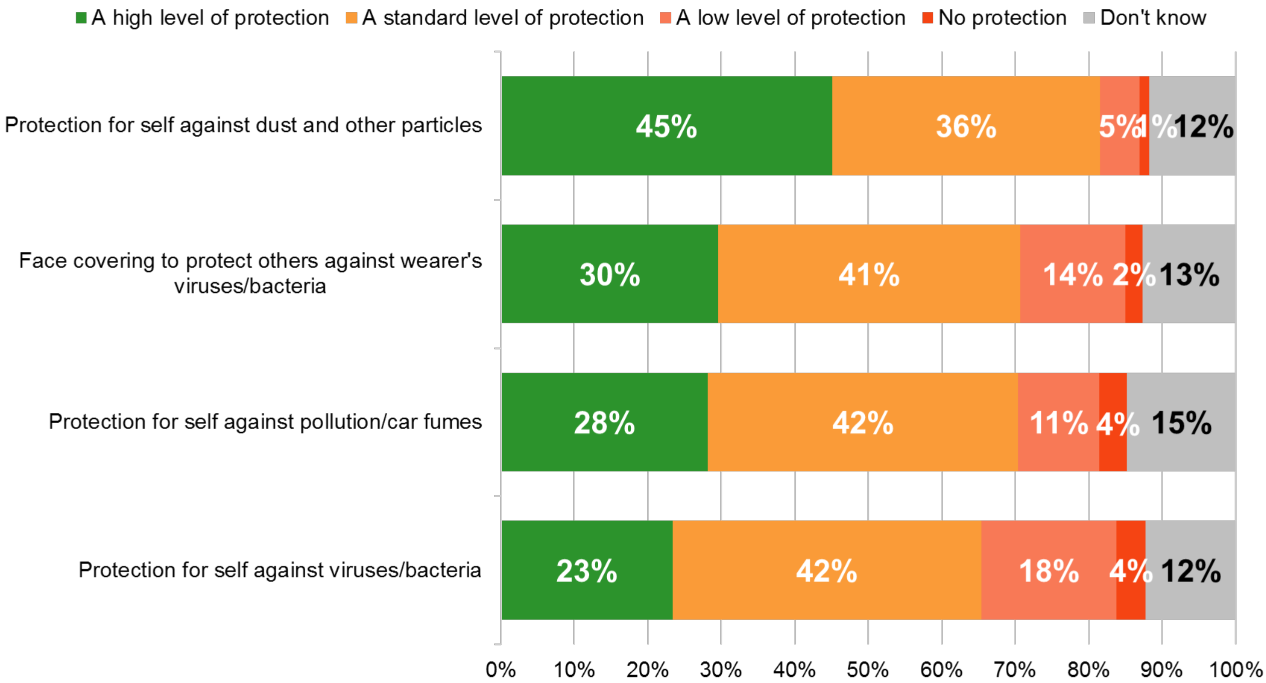
Q: Now, please rank the face coverings/ masks in order of how much protection they would offer people in close contact to the wearer from COVID-19, where 1 is the highest level of protection and 4 is the lowest
Base: All respondents [in COVID-19 section] (n=3,421)

A quarter of respondents were aware of PM2.5 filters before taking part in the survey (25%). Those aged 65 and over were the least likely to be aware of PM2.5 filters (21%). BAME individuals were more likely than their white counterparts to be aware of the filter (30% vs 24%) and individuals with high education levels the most likely to be aware (32%).

Respondents are most confident in a PM2.5 filter offering protection against dust and other particles with just under half saying the filter would offer a high level of protection in this scenario (45%). Three in ten think a PM2.5 filter offers a high level of protection to protect others against the wearer’s viruses/ bacteria (30%), while less than a quarter think the filter offers a high level of protection for the wearer themselves against viruses/ bacteria (23%).

There is a notable trend across age for thinking the PM2.5 filter offers a low level of protection for the wearer against viruses/ bacteria – those aged 18 to 29 the most likely to think so (23%), falling to a fifth of 30 to 49 year olds (2%), 15% of 50 to 64 year olds, and only 14% of those aged 65+. Those with low education levels are the most likely to think that the PM2.5 filters offer a high level of protection (28%).

Figure 51: Levels of protection indicated by a PM2.5 filter in each scenario

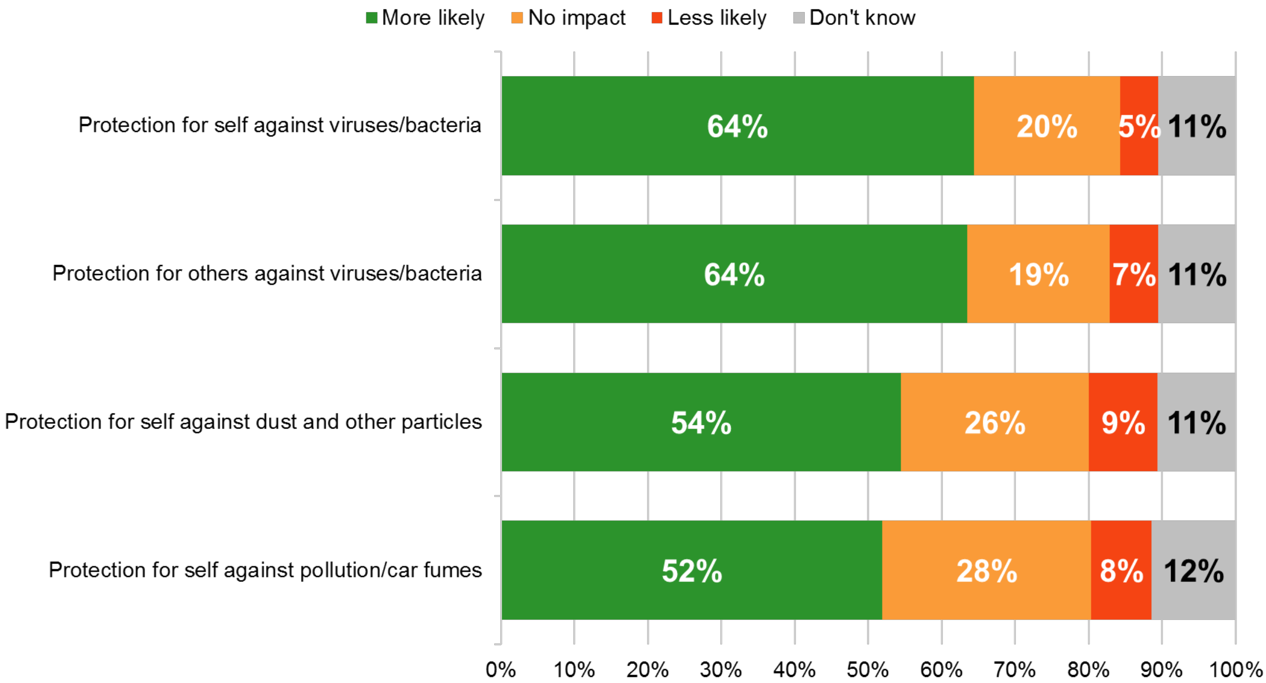


Q: What would a PM2.5 filter indicate for each of the following?
Base: All aware of PM2.5 filters [in COVID-19 section] (n=855)

When looking for a face covering/ mask to protect themselves against viruses/ bacteria, the addition of a PM2.5 filter makes almost two-thirds of individuals more likely to buy that covering (64%). The same is true when looking for a face covering/ mask to protect others against viruses/ bacteria (64%). This implies that, although PM2.5 filters are not regarded as offering the highest level of protection, the level that they do offer is enough to encourage individuals to purchase them when available.

Those aged 65 and over were the most likely to be positively influenced by the addition of a PM2.5 filter – the most likely to say that it would make them more likely to purchase when looking for a face covering to protect themselves against viruses/ bacteria or when looking for a face covering to protect others against viruses/ bacteria (73% each).

Figure 52: Impact of a PM2.5 filter on purchase decision in each scenario



Q: To what extent, if at all, would the addition of a PM2.5 filter affect your purchase decision when looking for a face covering / mask for the following reason(s)?
Base: All aware of PM2.5 filters [in COVID-19 section] (n=855)

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