



Office for Product
Safety & Standards

OPSS Public Attitudes Tracker: Wave 2

BEIS Research Paper

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Executive Summary

Key comparisons with wave one

	Wave one	Wave two
Products sold in the UK are generally safe as there are regulations in place to ensure this	76%	78%
To what extent do you feel that the UK's system for regulating the safety of products ensures that products you purchase are safe? - completely/ a great deal	58%	58%
I am aware of my consumer rights if a product I have bought online is unsafe	55%	57%
Experienced a safety issue with a product purchased in last 6 months	8%	10%
Seen or heard about a product recall or other product safety warning in last two years	58%	53%
Registered a product purchased in last six months	31%	32%
Of those who registered product, consider the process "easy"	92%	93%

Key findings

Perceptions of safety

- Unchanged from wave one, three fifths (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.
- A previous experience buying a product remains the most commonly cited factor that builds trust in a product being safe (39%). Other factors such as online reviews (34%) and the brand name of the manufacturer (30%) are also important in building trust.
- Compared with wave one the existence of a kitemark/ quality trademark (26% from 31%) and the warranty/ guarantee offered (22% from 29%) are now less influential factors in trusting that a product is safe.
- As found in wave one, one in ten (9%) people mentioned product safety as an important factor taken into account when purchasing a product.
- Over three quarters (78%) of the public agree that products sold in the UK are generally safe as there are regulations in place to ensure this, a small increase from the 76% that reported this in wave one.

A focus on online purchasing

- There remains strong levels of agreement from the UK public that the seller is responsible for ensuring a product bought online is safe, with four in five (84%) agreeing that is the case.
- Two-thirds (67%) of the public agree that they always consider the safety of products they are buying online; however, this is lower than the 71% of the public who reported this in wave one.
- Three fifths (57%) of the UK public agree that they are aware of their consumer rights if a product they have bought online is unsafe.
- A quarter (26%) of the UK public think that products bought from Amazon marketplace are unsafe and that rises to close to two in five (37%) who think that products bought from other online marketplaces are unsafe.
- Of people who have purchased products from an online marketplace, 40% think the online marketplace has some responsibility for ensuring the product they purchased is safe, although ultimate responsibility lies with the manufacturer.

A focus on labelling

- When purchasing electrical equipment, two in five (40%) report looking for a CE mark. This is also the case when thinking about purchasing white goods (37%).
- Comparatively, when purchasing baby products or toys, one third report looking for the Age Warning Logo (33% and 34% respectively).
- Over half (54%) of UK adults correctly identify the meaning of the baby with a line label, and a similar proportion (50%) correctly identify the meaning of the Display label pursuant to Regulation 10 FFRs (Fire Resistance)
- The majority would prefer to access safety information through a physical product / label (53%).
- Respondents were asked their preference to use a range of product labels. Under one in ten (7%) would prefer to access safety information through a QR code printed on the product or label, and a smaller proportion would access information through a screen on the device or in device settings (if applicable) (4%).

Experiences of safety issues

- One in ten have had a safety issue with an item they purchased in the last six months. Safety issues are most common with changing tables (23%), extractor fans (20%), and musical instruments (18%).
- The most commonly reported impact of safety issues continues to be stress (20%) followed by physical harm (15%) and damage to property/ household items (12%).
- Most people do take some form of action when they experience a safety issue (71%). The most common action to take after experiencing a safety issue remains returning the item to the seller for a refund/ exchange (20%).

- 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%).
- The actions taken are consistent with wave one; the most common is to return the item for a refund/ exchange (20%).

Perceptions and experiences of product recalls

- Awareness of product recalls or safety notices of consumer products¹ remains consistent between wave one (58%) and wave two (53%).
- White goods continue to be the most commonly identified recalled product for something respondents own, with one third (34%) citing this in wave two. However, unlike other products it was the only one to see a significant decrease compared to wave one (45%).
- The most common sources for hearing about a product recall or safety notice continue to be the media (32%), directly by a seller (27%), or by a manufacturer (18%).
- One in three (31%) report returning the item for a refund / exchange after seeing or hearing the recall. One quarter (24%) report following the manufacturer's guidance for safe use and one in five (22%) allowed the manufacturer to make modifications to the product.
- Those who heard about their recall through information from the Government or by being contacted directly by the manufacturer are the most likely to report that they allowed the manufacturer to make modifications to the product (42% and 40% respectively).

Perceptions and experiences of product registration

- A third of those who purchase an eligible product register it (32%) and uptake remains highest for white goods (58%).
- The most common reason for registering a product is still to validate a warranty (72%). There has been a significant fall in the proportion of people registering an eligible product to receive information and updates (26% vs 35%).
- Almost all of those who registered a product found the product registration process to be easy (93%). However, those who registered their item via an app in wave two are more likely than those in wave one to have found the process difficult (10% vs 0%).
- The most common reason for not registering an eligible product is not wanting to/ not thinking it necessary (37%).
- There is sustained appetite for information around the benefits of product registration. In wave two, there is a marked increase in a desire for guidance on benefits from the government specifically.

¹ Excluding food, pharmaceutical, or vehicle product recalls as these are not within OPSS' remit

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 (2018²) 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 Strategy³.

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.⁴ It aims to benchmark and measure various key objectives of OPSS as well as filling evidence gaps for various policy topics.

Key objectives of this research include:

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

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

This report presents the findings from the second wave of tracking, including comparisons against wave one where applicable. The report also includes an exploration of key topical policy areas including magnets, smart devices, and the circular economy.

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.

² 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>

³ Ibid.

⁴ OPSS (October 2020), Consumer attitudes to product safety. <https://www.gov.uk/government/publications/consumer-attitudes-to-product-safety> Accessed January 2021

Approach

The findings are based upon a large-scale representative sample of 10,296 people from across the United Kingdom (UK) collected through online research methods. Fieldwork was carried out between the 17th May to 15th June 2021. A supporting survey of 251 people who are very low or non-internet users was conducted via telephone between the 3rd to 28th June 2021.

After the close of the online survey, three text-based online focus groups were conducted with survey participants. Groups were split by age (18 to 34, 35 to 60, 61+) and included a mix of genders, ethnicities, social grades, and locations. Participants were asked to respond to an open ended question as part of the recruitment criteria to ensure that participants were articulate enough to participate in text based research.

Where appropriate, comparisons have been made with data from wave one. The wave one online survey sample size was 10,230 adults. Fieldwork was undertaken between 17th and 30th November 2020. Wave one offline survey sample size was 512 adults. Fieldwork was undertaken between 23rd November and 12th December 2020.

Unless otherwise stated, figures and data presented are from the online survey. Where two or more groups are discussed, only statistically significant differences to the 95% confidence interval are mentioned. Significance testing is not applied for figures based on fewer than 50 respondents. Where included, figures based on fewer than 50 respondents are noted and should be treated with caution. Figures based on fewer than 30 respondents are not included or reported upon.

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

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 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

- Unchanged from wave one, three fifths (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.
- A previous experience of buying a product remains the most cited factor that builds trust in a product being safe (39%). Other factors such as online reviews (34%) and the brand name of the manufacturer (30%) are also important in building trust.
- Compared with wave one, the existence of a kitemark/ quality trademark (26% from 31%) and the warranty/ guarantee offered (22% from 29%) are now less influential factors in trust that a product is safe.
- As found in wave one, one in ten (9%) people mentioned product safety as an important factor considered when purchasing a product.
- Four in five (78%) of the public agree that products sold in the UK are generally safe as there are regulations in place to ensure this, a small increase from the 76% that reported this in wave one.
- People with a disability are also more likely than those without a disability to agree that they usually look for product safety labels and markings when making a purchase (53% compared with 43%).

The UK system for regulating product safety

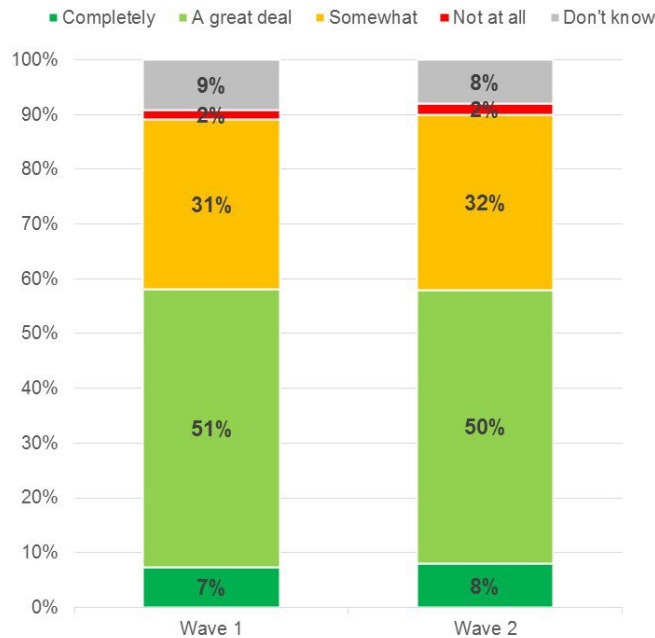
Three fifths (58%) of the UK public feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe. This viewpoint is unchanged from the wave one data. Almost a third (32%) feel the product safety system only somewhat ensures that products are safe and a very small minority (2%) feel this system doesn't keep products safe at all.

Younger people (aged 18 to 29) are less likely to feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe – 51% compared with 62% of those aged 65 and over. Similarly, those with lower levels of educational attainment (62%) are more confident in the UK safety system than those with high levels of educational attainment (56%)

- Respondents identifying as LGB+ are less likely to feel that the UK's system completely or to a great deal ensures that products they buy are safe – 52% compared with 60% of heterosexual people – it should be noted that younger LGB+ respondents are less likely than older LGB+ respondents to feel the UK's system completely or to a great deal ensures that products they buy are safe (46%, 18-24 year olds vs 66%, 50-64 year olds)

- There are no differences between the views of those respondents with a disability (57%) and those without a disability (59%)

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 (wave one n=10,230, wave two n=10,296)

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%.

The qualitative research found that perceptions of safety may be changing. COVID-19 has made those we spoke to more sensitive to the general idea of safety and the safety of those around them. Brexit has made some concerned about new UK regulations and whether these will protect the consumer in the same way European Union rules did. Those from our older group mentioned that regulations and standards have improved in the long term.

“Brexit adds fear that standards will drop” (35-60 years old)

“EU protections were top of the line and seriously progressive. Although Britain has always been at the forefront of safety, the protection of the EU regulations was comforting and a big loss” (18-35 year old)

Generally, regulation is taken as a ‘given’, participants in the qualitative research assumed that products go through comprehensive checks. Though certain standards are often presumed, participants valued having set regulations to protect themselves and others.

“I assume that most products have to be regulated to a certain standard” (18-35 year old)

In the qualitative research we spoke with participants about who holds the responsibility for maintaining the safety of products. The majority felt that the manufacturer holds ultimate responsibility, creating a product which can be used in a safe way, according to set standards so that they are 'fit for purpose'. Though the consumer has a responsibility to use items in a reasonable way and follow both instructions and safety warnings. Both the government and regulators have a responsibility to create and enforce standards.

"Companies can't be trusted to set the standards; it has to be a regulating body" 18-35 year old)

"I don't think that companies would bother anywhere near as much without governmental regulations and standards (younger - 18-35 year old)

"I think it has become something that is more closely monitored in recent years. There seems to be more and more regulations that things have to meet" 35-60 years old)

"Manufacturers are the ones who actually make the product so they are able to factor in safety when designing a product" (younger - 18-35 year old)

"I think having regulations is very important as most of us aren't knowledgeable enough to determine a product's safety ourselves" (18-35 year old)

"Manufacturers have an outright responsibility... The seller has some but limited responsibility" (61+)

Factors that influence perceptions of safety and product purchasing

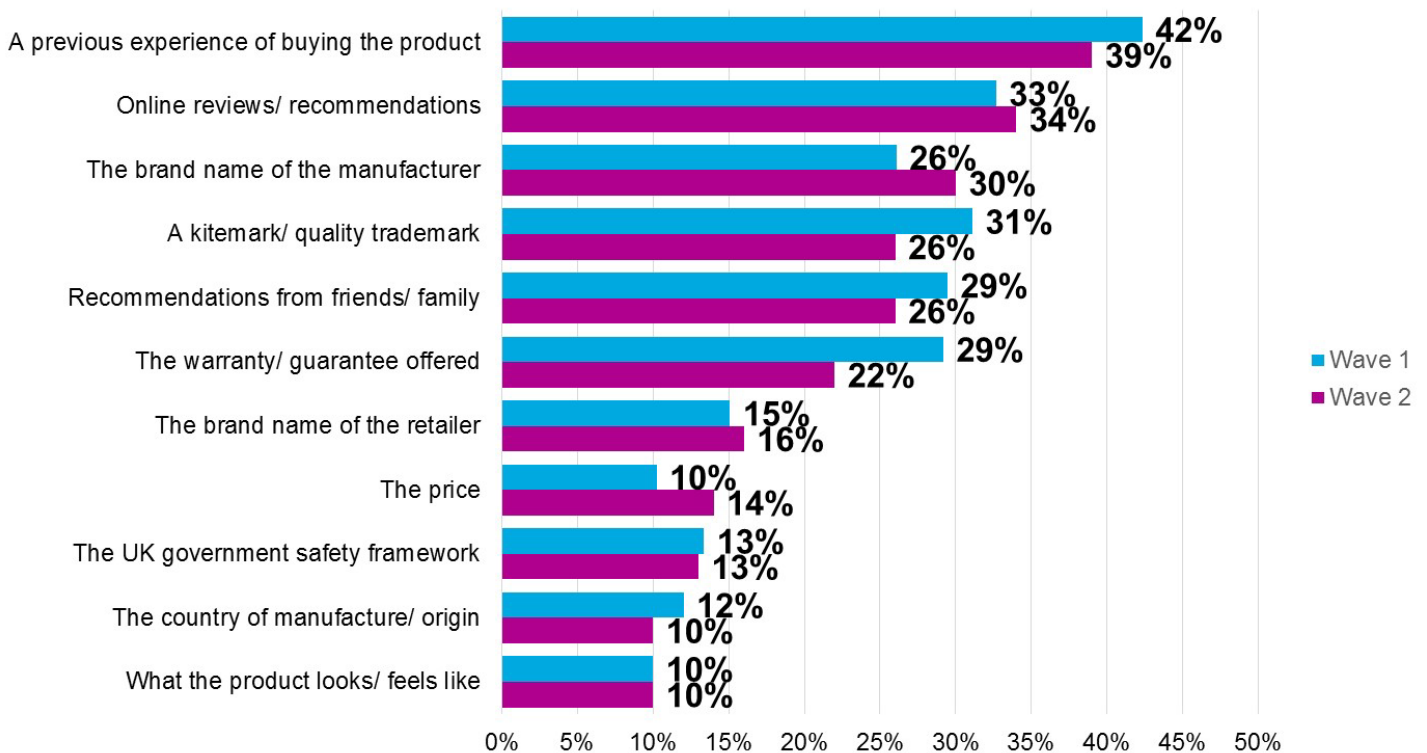
Important factors in product choice and safety

A previous experience of buying a product remains the most commonly cited factor that builds trust in a product being safe (39%). Other factors such as online reviews (34%) and the brand name of the manufacturer (30%) are also important in building trust.

In line with the wave one findings, what the product looks/ feels like (10%) and the country of origin/ manufacture (10%) are only influential factors in whether a product is safe for a small minority of the UK public.

In comparison with wave one the price of a product (14% from 10%) and the brand name of the manufacturer (30% from 26%) have become more important influencers of whether people trust that a product is safe. In contrast, compared with wave one the existence of a kitemark/ quality trademark (26% from 31%) and the warranty/ guarantee offered (22% from 29%) are now less influential factors in trust that a product is safe.

Figure 2: 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 (wave one n=10,230, wave two n=10,296)

The decline in the reports of a warranty/ guarantee influencing trust in product safety is driven by older consumers. In wave two 23% of those aged 50 to 64 years old and 28% of those aged 65 and over mentioned a warranty/ guarantee compared with 31% and 35% of each age group in wave one.

The decline in reports of a kitemark/ quality trademark was most acute for those consumers aged 50 to 64 years old, with 32% mentioning this as an influential factor in perceptions of safety in wave two compared with 41% in wave one.

As found in wave one, one in ten (9%) people report product safety as an important factor taken into account when purchasing a product. Roughly three fifths (55%) consumers say the price was important when purchasing a product and two fifths (40%) the quality of the product.

In comparison to wave one the factors most commonly taken into account when purchasing a product have remained broadly unchanged.

In the qualitative research participants spoke about the different factors which are important when choosing a product. Certifications, including warranty details are picked up on, particularly fire safety and CE marking; though some take these as a given, particularly with larger companies. Some are concerned that these markings are often faked.

“I’m with the others in not really knowing what most markings actually represent, but I’ve seen complaints online about some products sold in online stores having fake markings” (18-35 year old)

“I think there are certain sites that sell products that do not meet safety standards and mass ship cheap/ unsafe/ fake/ faulty products” (35-60 years old)

“ I don't often check [for certifications] to be honest and tend to trust that companies have met the legal requirements so must be safe” (18-35 year old)

Though price should not play a role in whether a product is safe or not, participants commented that cheap items are generally more likely to be unsafe.

“Safety should be an objective standard, so our perception of it shouldn't be affected by seller or price” (35-60 years old)

“Price is an important factor. Cheap cost generally means cheap build and materials” (18-35 year old)

“I tend to look for the CE mark rather than the price. If it's got a safety recognition that is more important” (35-60 years old)

Participants also commented that reviews (e.g. on Which? And Trust Pilot) are considered to be important and are relied upon during the research stage of purchasing, especially if the product is expensive. Although reviews are valued, some are suspicious about reviews which are fake or have been paid for.

“I know there are certain safety standards marks but I have no idea what most of them mean, I'd mostly look for reviews and expert insights if I was really interested in the safety of a product.” (18-35 year old)

“Reviews are very helpful. And I also do a lot of research if I am buying something expensive” (35-60 years old)

Perceptions of safety

The UK public remains strongly of the view that they expect a product to be safe regardless of the price they pay for it (85%). In a similar view, four in five (79%) 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.

More than three quarters (78%) of the public agree that products sold in the UK are generally safe as there are regulations in place to ensure this, a small increase from the 76% that reported this in wave one.

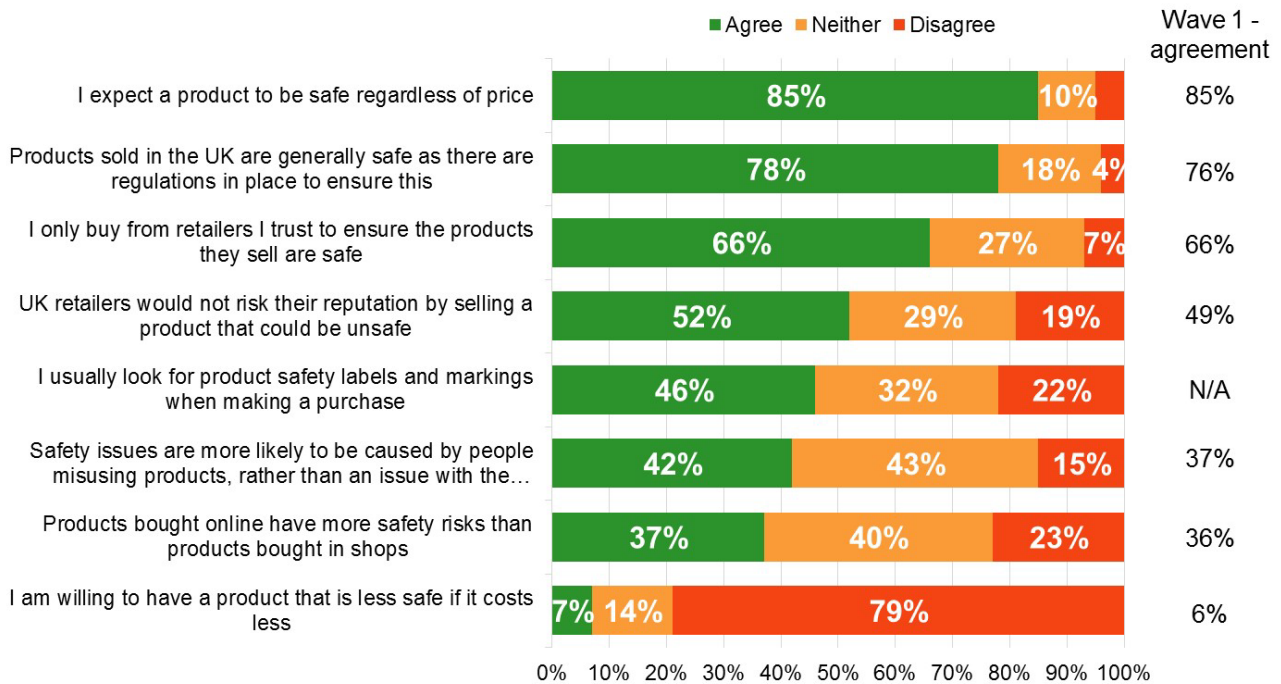
Compared with wave one, there have also been small increases in the proportion of the UK public that agree that UK retailers would not risk their reputation by selling a product that could be unsafe (52% from 49%) and that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself (42% from 37%).

Respondents who are white (43%) are more likely than those from a Black, Asian and minority ethnic (BAME) background (35%) to agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself. As are those people with lower level of education (45%) compared with those people with higher levels of education (38%).

Older consumers (aged 65+) are much more likely than younger consumers (aged 18-29) to agree that they usually look for product safety labels and markings when making a purchase (59% compared with 35%).

People with a disability are also more likely than those without a disability to agree that they usually look for product safety labels and markings when making a purchase (53% compared with 43%).

Figure 3: 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 (wave one n=10,230, wave two n=10,296)

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%)

In the qualitative research, participants felt that manufacturers hold the ultimate responsibility to manage the safety of the products they produce. Though the consumer must act sensibly and use the product in the way it was designed.

“If you buy it you are responsible for ensuring it is maintained” (18-35 year old)

“The manufacturers - to an extent. It also depends on how you've cared for an item” (35-60 years old)

“The main responsibility is on the company who makes the product but also on the government to put regulations in place” (18-35 year old)

There was a mixed response around whether the definition of safety should adjust according to the person. Overall participants felt that there must be more stringent rules in place for children – though some commented that safety should be universal.

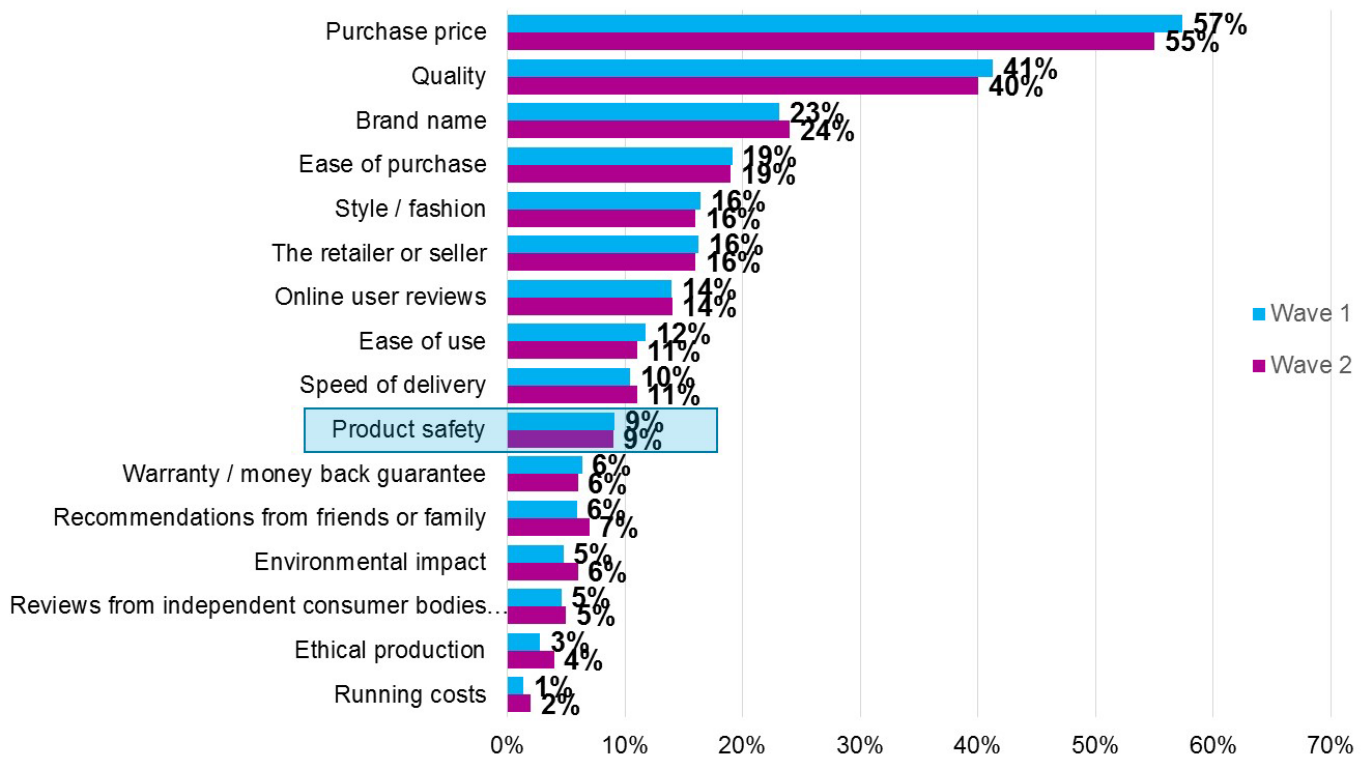
“[Product safety is] ensuring myself and others don't cause wilful or negligent harm to others” (18-35 year old)

“The definition does change. I would do things myself I wouldn't ask others to do” (18-35 year old)

“I feel we have more responsibility to protect children” (younger - 18-35 year old)

“Everything should be of equal standard and quality” (35-60 years old)
“Children are vulnerable and it is up to parents to make sure as far as possible that a product is safe to use. E.g. small things can choke so supervision is necessary” (61+)

Figure 4: Factors taken into account when purchasing a product

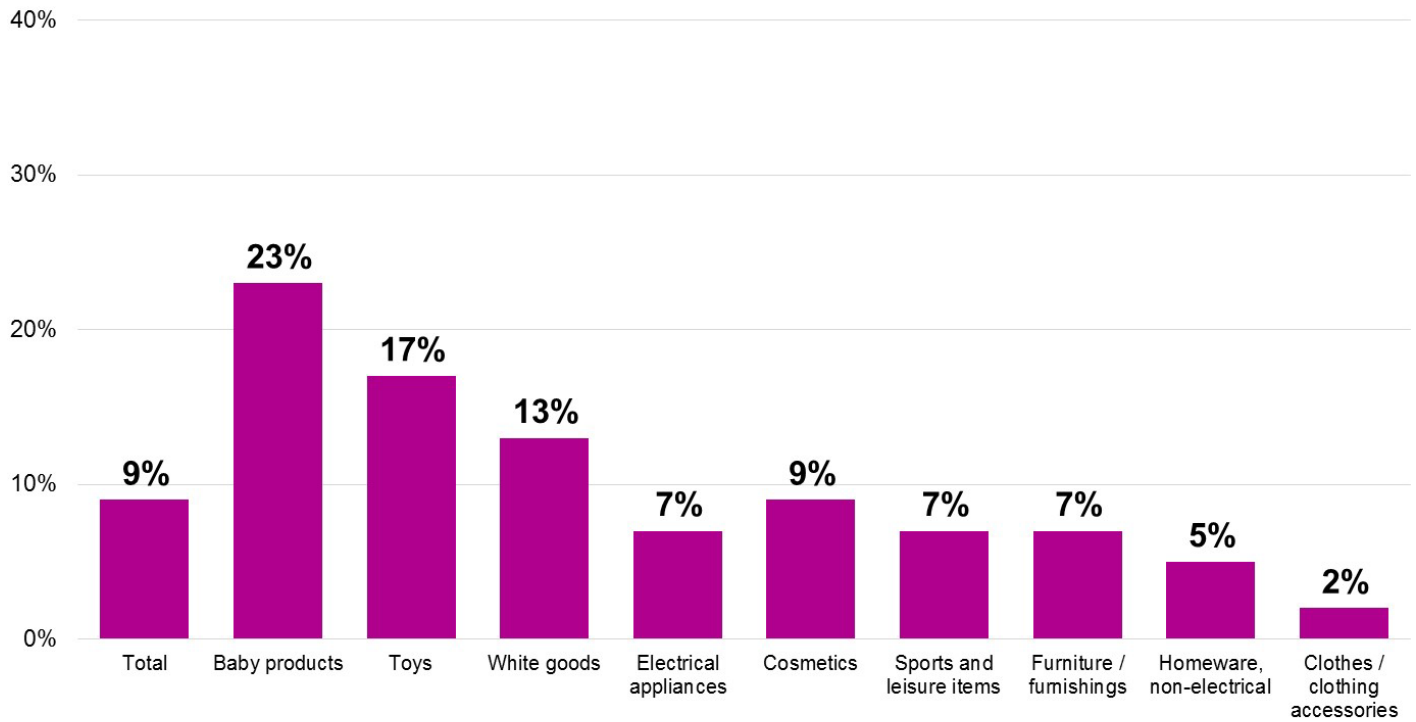


Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
 Base: All respondents (wave one n=10,230, wave two n=10,296)

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. This is a consistent view across different social demographics, however those people whose lives are limited a lot by a disability are slightly more likely to cite product safety as an important factor in purchase choice than those people who are not disabled in any way (12% compared with 8%).

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 (23%) or toys (17%) 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 factors⁶)

Base: All respondents (n=8,260), product asked about: baby products (n=314), toys (n=925), white goods (n=676), electrical appliances (n=1,235), cosmetics (n=1,285), sports and leisure items (n=886), furniture/ furnishings (n=974), homeware (n=753), clothes/ clothing accessories (n=1,212)

For other product categories such as homeware, clothes and furniture/ furnishings price (62% homeware, 60% clothes, 59% furniture) quality (46% homeware, 47% clothes, 48% furniture) and style (36% homeware, 40% clothes, 39% furniture) are more important in purchase choice than they are for other product categories.

For baby products alongside product safety being important, quality (51%), recommendations (19%) and ease of use (18%) are also more important factors in purchase choice than they are for other product categories.

A focus on online purchasing

Key findings

- There remains strong levels of agreement from the UK public that the seller is responsible for ensuring a product bought online is safe, with four in five (84%) agreeing that is the case.
- Two-thirds (67%) of the public agree that they always consider the safety of products they are buying; however, this is lower than the 71% of the public who reported this in wave one.
- Three fifths (57%) of the UK public agree that they are aware of their consumer rights if a product they have bought online is unsafe. As in wave one, younger respondents (aged 18-29) are less likely to report being aware of their consumer rights – a third (34%) disagreeing compared with only 8% of those aged 65 years plus.
- A quarter (26%) of the UK public think that products bought from Amazon marketplace are generally unsafe and that rises to close to two fifths (37%) who think that products bought from other online marketplaces are unsafe.
- Of people who have purchased products from an online marketplace, 40% think the online marketplace has some responsibility for ensuring the product they purchased is safe, although ultimate responsibility lies with the manufacturer – 39% said they are most responsible for ensuring safety.
- Levels of concern about a product from outside of the EU/ UK being unsafe compared to a product from within the EU/UK increase with age, with 73% of those aged over 65 years being concerned about the safety of products bought from outside the EU/ UK compared with half (50%) of those aged 18-29 years of age.

Context from wave one

During the qualitative research phase of wave one, people's understanding of the difference between a sellers and online marketplaces was explored in some depth.

Most participants had a good understanding of what an online marketplace is, referring to eBay and Etsy as examples. However, there was more confusion around the difference between Amazon and Amazon Marketplace. Online marketplaces were thought of as featuring handmade or homemade products by independent sellers.

When shopping via marketplaces, participants in wave one would look for seller-specific metrics such as reviews. Many were concerned about fake reviews on some marketplaces so would also look for how 'established' the seller appeared to be.

"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" (wave one participant)

"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" (wave one participant)

The wave one qualitative research also found that perspectives on buying online differ significantly depending on the website. Online marketplaces such as eBay and Amazon were met with some unease due to a lack of trust with unknown sellers or a perception that products/ sellers do not have sufficient checks in place. Participants preferred buying products direct from manufacturers as they felt there would be a higher likelihood of safety checks being in place.

“I feel [with] Amazon and eBay there is a higher chance of purchasing an unsafe product” (wave one participant)

“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” (wave one participant)

Perceptions of purchasing products online

In the survey, two thirds (65%) of those who purchased a product in the last six months did so online, including “click and collect” orders. With two-thirds (67%) of the public in agreement that they always consider the safety of products they are buying; however, this is lower than the 71% of the public who reported this in wave one.

The qualitative research found that there has been a significant shift towards shopping online during the COVID-19 pandemic due to safety concerns around shopping in store. However, some participants commented that they are apprehensive about purchasing electrical products online as there is a perception that safety standards are not always followed, therefore reviews on Google, Trust Pilot, Amazon and Which? are perceived as valuable. A minority also look at reviews on YouTube.

Participants in the qualitative research were reassured by verified reviews on sites like Trustpilot. However, markings related to safety are less accessible when shopping online and are not specified in the details section.

Some websites are more trustworthy than others, with some selling poor quality goods with ‘fake’ reviews and others being more ‘established’ with fair returns policies. Overall online marketplaces are felt to have more potential to be unsafe as the provenance of items is less clear. UK sellers are generally trusted more than companies based abroad.

“The internet has opened up a world of possibly unsafe products that can bypass the usual safety measures” (61+)

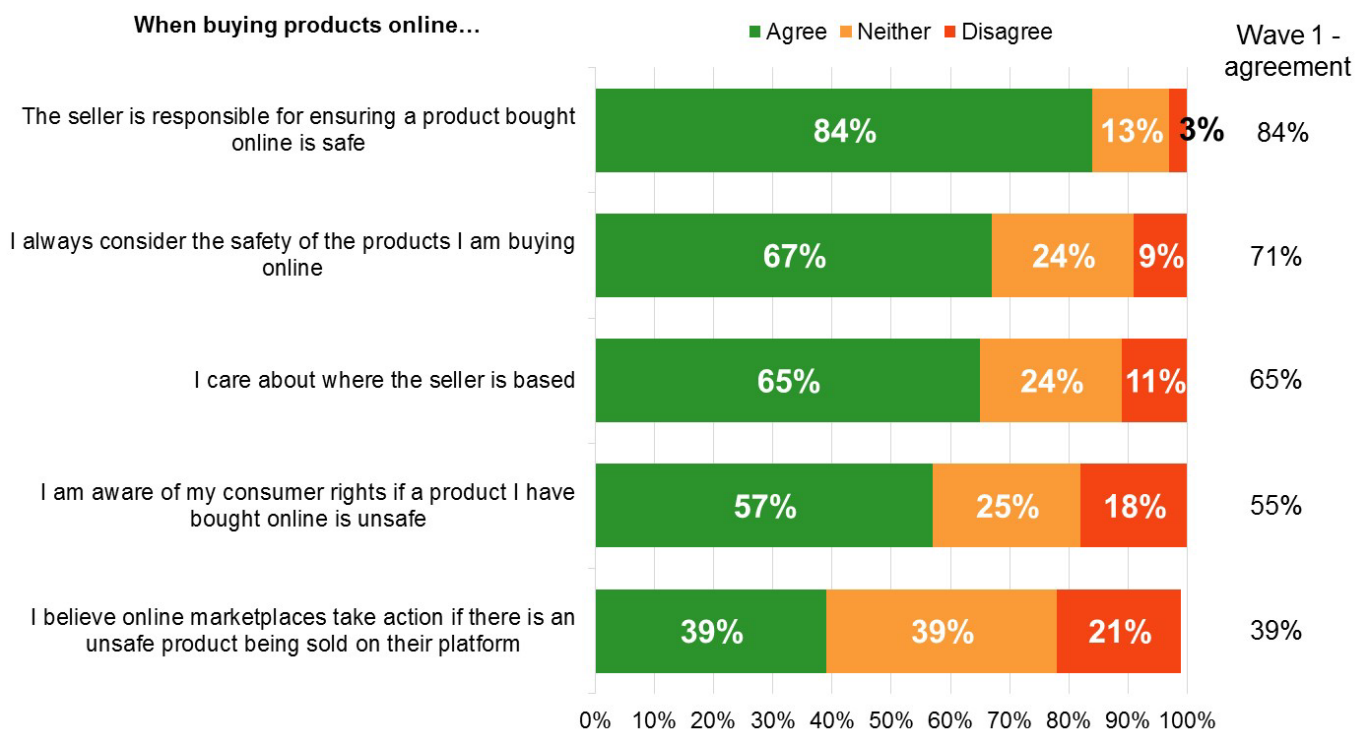
“During [COVID-19] it's been a lot more convenient and safer to buy online, I don't think I'd change the habit in a hurry” (18-35 year old)

There remains strong levels of agreement from the UK public that the seller is responsible for ensuring a product bought online is safe, with four fifths (84%) agreeing that is the case.

However, it continues to be the case that 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 two fifths (39%) neither agree nor disagree that this is the case.

Younger consumers (aged 18-29) are more likely than older consumers (aged 65+) to be confident that online marketplaces will take action if unsafe products are being sold on their platform (44% in agreement compared with 36%).

Figure 6: 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 (wave one n=10,230, wave two n=10,296)

As consumers get older, they are also more likely to care about where a seller is based. Just over half (55%) of 18-29 years olds agree they care about where a seller is based compared with 64% of 30-49 year olds, 68% of 50-64 year olds and 73% of 65+ year olds.

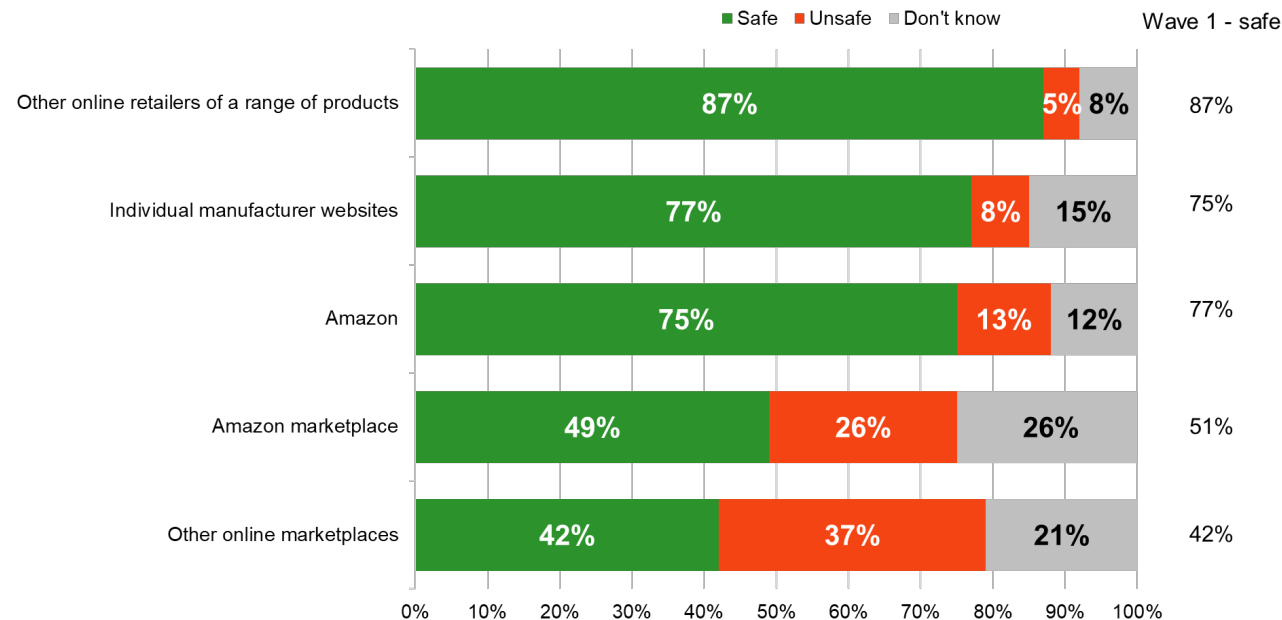
Overall, 57% of the UK public agree that they are aware of their consumer rights if a product they have bought online is unsafe. However, as seen in wave one, younger respondents (aged 18-29) are less likely to be aware of their consumer rights – with a third (34%) disagreeing they are aware compared with only 8% of those aged 65 years plus.

- A lower proportion of respondents with a high level of educational attainment agree they always consider the safety of the products when buying online (63% compared with 73% of those with low levels of educational attainment)
- Respondents who are single are less likely to agree they always consider the safety of the products when buying online (57% of those who are single compared with 73% of those who are married/ in a civil partnership)
- Respondents with lower levels of educational attainment are more likely to agree that they are aware of their consumer rights if a product I have bought online is unsafe – 59% compared with 54% of those with high level of attainment

The majority of the UK public remain 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 manufacturer websites (77%) or Amazon (75%) are safe.

There is greater uncertainty about whether products bought from Amazon marketplace or other online marketplaces are safe. A quarter (26%) of the UK public think that products bought from Amazon marketplace are unsafe and that rises to close to two fifths (37%) who think that products bought from other online marketplaces are unsafe.

Figure 7: 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] (wave one n=5,115, wave two n=5,161)

Younger consumers (aged 18-29) are more likely than older consumers to question the safety of products purchased through Amazon marketplace, with 29% of 18-29 year olds feeling products are unsafe compared with 22% of the over 65 year olds.

People with higher levels of educational attainment are also more likely to question the safety of products purchased from Amazon marketplace and other online marketplaces.

- High educational attainment – 31% feel products from Amazon marketplace can be unsafe, 40% feel products from other online marketplaces can be unsafe
- Low educational attainment – 19% feel products from Amazon marketplace can be unsafe, 33% feel products from other online marketplaces can be unsafe

Responsibility for safety when purchasing online

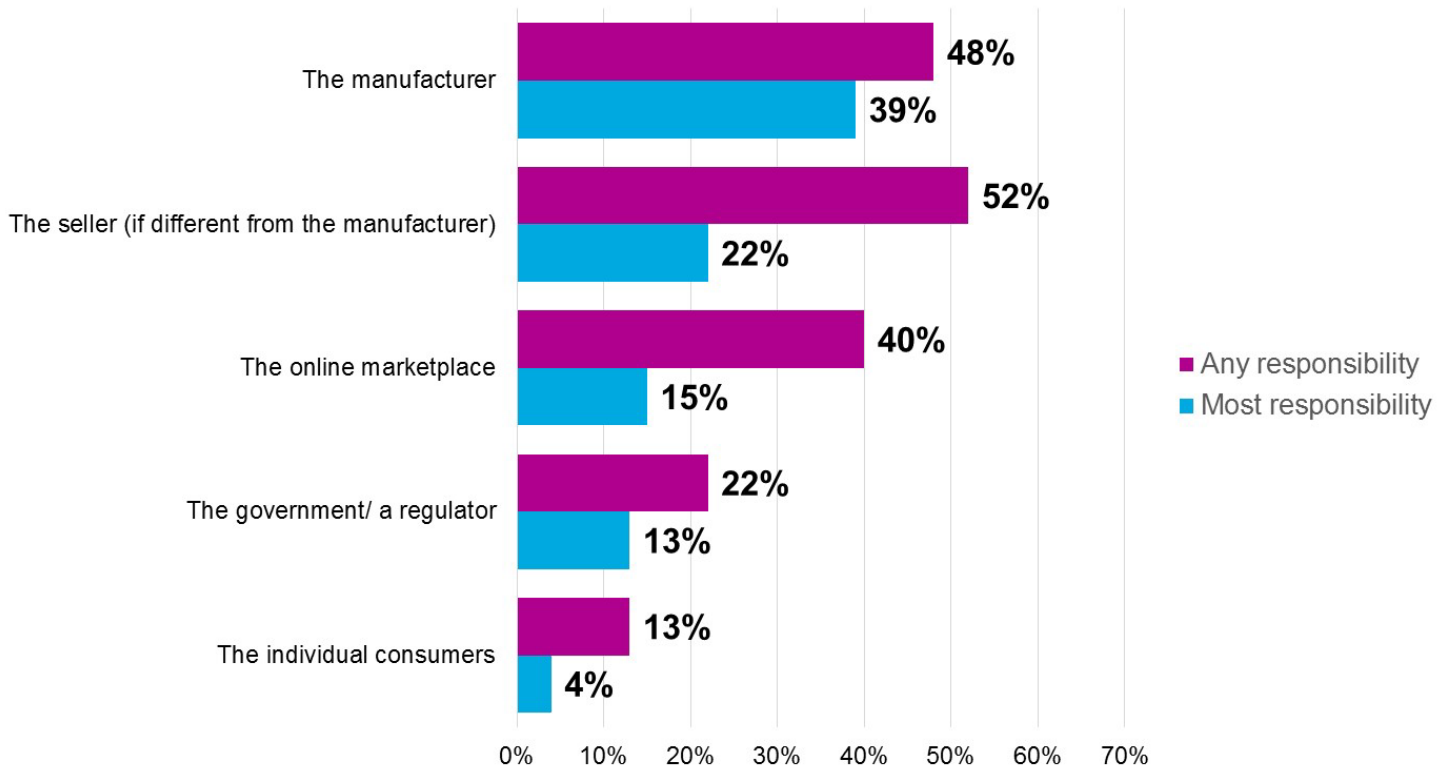
Most commonly, people using online marketplaces feel that the manufacturer (39%) is most responsible for ensuring that the product they purchased is safe.

Of people who have purchased products from an online marketplace, 15% of them feel that the online marketplace is most responsible for ensuring that the product they purchased is safe.

A fifth (22%) of people who have used an online marketplace feel that the government/ a regulator should have some responsibility for the safety of products purchased through a marketplace.

Respondents with low levels of educational attainment are more likely to feel the manufacturer is most responsible and less likely to feel the seller is most responsible for ensuring that the product they purchased from an online marketplace is safe – 48% - manufacturer compared with 34% of those with high attainment, 15% the seller compared with 24% of those with high attainment.

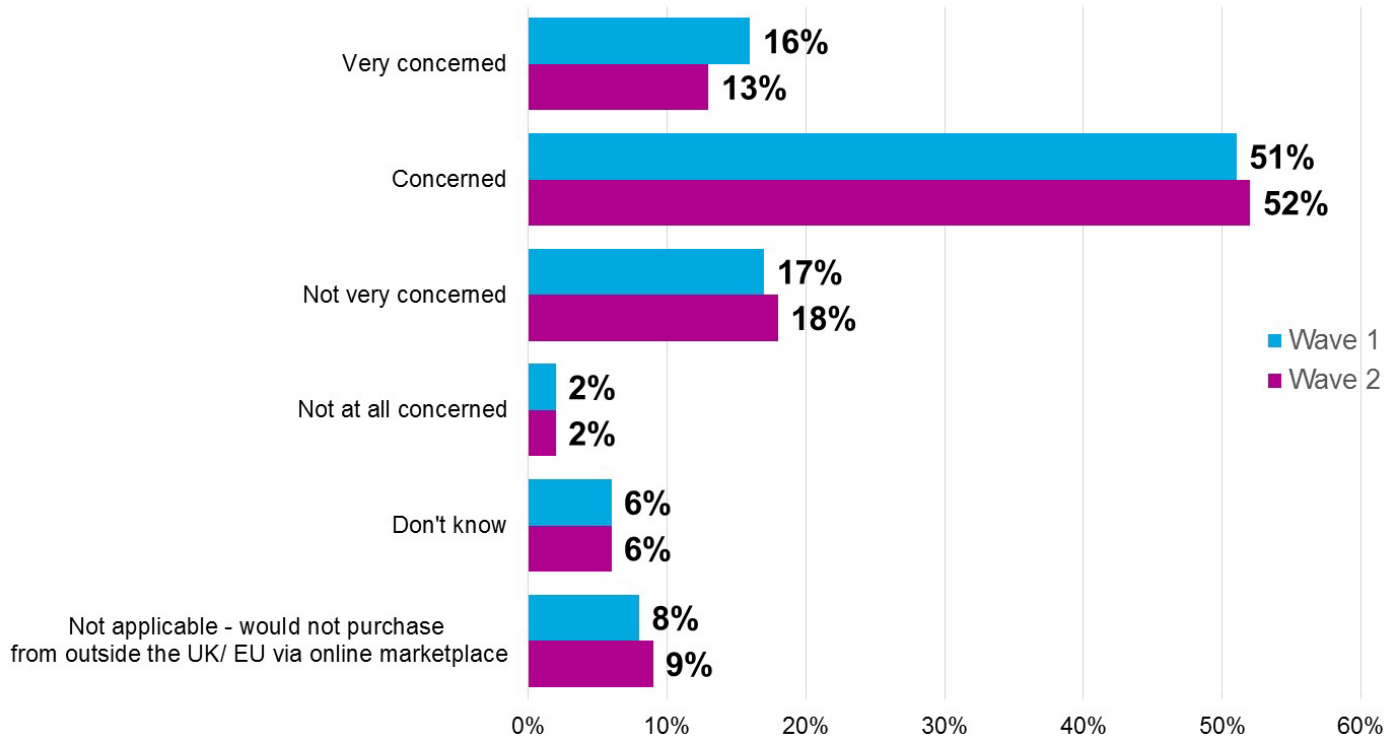
Figure 8: Responsibility for ensuring a product is safe for UK consumers



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

Two-thirds (65%) 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 EU/ UK, on par with the findings of wave one. Levels of concern increase with age, with 73% of those aged over 65 years of age being concerned about the safety of products bought from outside the EU/ UK compared with half (50%) of those aged 18-29 years of age.

Figure 9: Concern for a product from outside EU/ UK on an online marketplace being unsafe compared to product from within EU/ UK



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

- Respondents whose first language is English (65%) are more likely than those whose first language is not English (59%) to be concerned in the safety of purchasing a product from outside the EU/ UK through an online marketplace
- Respondents who rent their home are less likely to be concerned than those respondents who own their own home – 61% compared with 70%

A focus on labelling






Key findings

- When purchasing electrical equipment, two in five (40%) report looking for a CE mark. This is also the case when thinking about purchasing white goods (37%).
- Comparatively, when purchasing baby products or toys, one third report looking for the Age Warning Logo (33% and 34% respectively).
- Just under half (46%) state that they would look for the display label pursuant to Regulation 10 Furniture and Furnishings (Fire Safety) Regulations 1988 (FFRs) when purchasing any furniture or furnishings.
- Over half (54%) of UK adults correctly identify the meaning of the Age Warning label, and a similar proportion (50%) correctly identify the meaning of the display label pursuant to Regulation 10 FFRs.
- The radio equipment pictogram is the least well known, with under one in ten (7%) correctly identifying its meaning.
- Respondents were asked their preference to use a range of product labels. The majority would prefer to access safety information through a physical product / label (53%).
- Under one in ten (7%) would prefer to access safety information through a QR code printed on the product or label, and a smaller proportion would access information through a screen on the device or in device settings (if applicable) (4%).
- Younger or BAME respondents are more likely to show preference for accessing information through a QR code or via the device screen / settings. However, those living with a disability, or of a lower social grade are less likely to use a QR code printed on the product/label.

Understanding conformity assessment marks

In this section, respondents were asked around their awareness and understanding of safety labelling and conformity assessment marks. A summary of each kitemark/ label can be found below. Further information is provided in the technical report.

Mark image	Name	Applicable products
	CE mark	“New approach” product legislation including toys, electronics
	UKCA mark	The UKCA (UK Conformity Assessed) marking is a new UK product marking that is used for goods being placed on the market in the UK. It applies to most goods which required CE marking.

Mark image	Name	Applicable products
	BSI kite mark	Products having been assessed by BSI's certification group
	Age warning logo	Toys which would be hazardous to children
	Lion mark	Toys
	Radio equipment pictogram	Radio equipment with restrictions on putting into service or requirements for authorisation of use.
	Display label pursuant to Regulation 10 FFRs	Furniture/ furnishings

When purchasing electrical appliances, two in five look for either the CE mark (40%) or the BSI kite mark (37%). When looking at those who were asked about safety issues experienced with electrical appliances in the past six months, the proportion who report they would look for a CE mark increases significantly to over half (56%).

One third (33%) of UK adults report they would look for the baby with a line label when purchasing baby products. Interestingly, there is no difference among adults reporting this regardless of whether they have children in the household (35%) or not (33%). Those with children under 5 are more likely to cite the baby with a line label (37%) compared to those with children aged 6 to 15 (32%).

A similar proportion (34%) would look for the baby with a line label when purchasing toys. However, unlike baby products, the proportion identifying this mark increases significantly when looking at those with children in their household (40%) compared to those with none (32%). Only one fifth (22%) report that they would look for the Lion Mark when purchasing toys, this proportion increased among those with children in the household (26%), a significantly higher proportion than those with none (20%).

Figure 10: Conformity assessment marks looked for on products

	Electrical appliances	Baby products	Toys	White goods	Furniture / furnishings
CE mark	40%	26%	29%	37%	24%
UKCA mark	8%	5%	5%	9%	8%
Age Warning Logo	5%	33%	34%	3%	4%
BSI Kitemark	37%	26%	20%	37%	27%
Lion Mark	3%	13%	22%	3%	3%
Radio Equipment Pictogram	6%	5%	8%	5%	4%
Display label pursuant to Regulation 10 FFRs	9%	15%	9%	8%	46%
None of these	13%	13%	13%	13%	13%
Don't know	27%	29%	27%	29%	25%

Q: Which, if any, of the following marks would you look for when purchasing each of the following types of product?
 Base: All in E-labelling section (wave two n=5,135)

The CE mark (37%) and the BSI kitemark (37%) are the most commonly identified marks when thinking about purchasing white goods. Those aged 50 and over are significantly more likely to identify the BSI kitemark in reference to white goods (49%) compared to those aged 18 to 39 (27%).

Nearly a half (46%) of UK adults identify the safety label as a mark they would look for when purchasing furniture/furnishings. White respondents are more likely to identify this mark (46%) compared to BAME respondents (40%). This is also the case for women (48%) compared to 43% of men.

Across all product types, there is a relatively large level of uncertainty surrounding conformity assessment marks, with close to a quarter of adults reporting that they did not know what mark they would look for when purchasing a product.

- Younger respondents (aged 18 to 29) are most likely to report that they wouldn't look for any mark when making a purchase (20% electrical appliances; 20% white goods; 20% furniture/furnishings; 19% baby products; 18% toys).
- This is also the case for those with a high level of educational attainment: for all products this audience are significantly more likely to state that they would not look for any marks (16% baby products; 15% electrical appliances; 15% toys; 15% white goods; 15% furniture/furnishings) compared to those with medium or low educational attainment.

Most participants from the qualitative research stated that they look out for labelling around products which are flammable, corrosive, or irritant which usually appear on the back of a package. However, a few admitted that they do not proactively look for a label as they assume the product is safe.

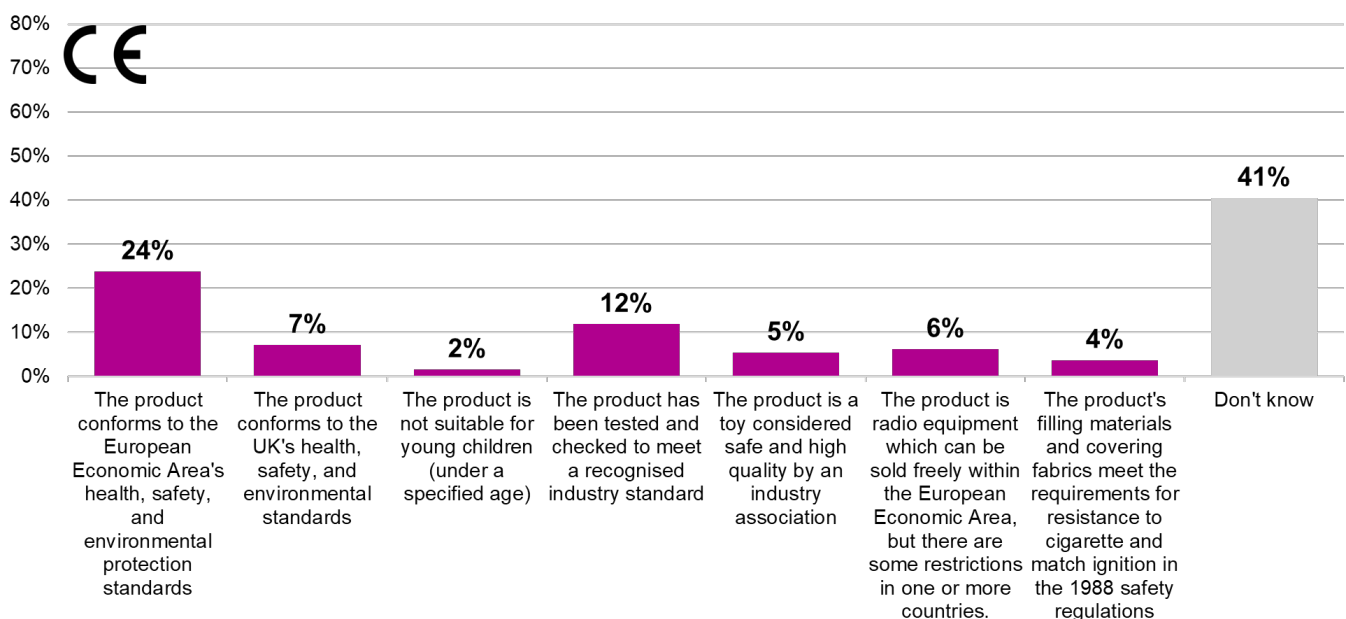
“I often don't look for the labelling as I assume it's regulated, I would say it's important but I just take the regulation as a given” (18-35 year old)

“I'd look for CE/ UKCA on most things. Lion Mark on toys, always. Fire resistance on furniture always. But I see the BSI as a bonus feature if a product has it - I don't actively seek it out” (35-60 years old)

Survey respondents were then asked to match the kitemark to a definition of its meaning. Some signs are more recognisable and descriptive than others e.g. the Age Warning Logo which includes an image of a child, in comparison to the lion symbol. The CE mark and fire protection were recognised across audiences. Respondents in the qualitative research referenced that these labels are felt to be aimed at the consumer to indicate the products follow certain standards or are unsafe for certain people, though awareness of these labels is not always high and some are concerned about certain labels not being legitimate.

Despite being frequently identified by respondents as a mark they would look for when making a purchase, only a quarter (24%) identified that the CE Mark means the product conforms to the European Economic Area's health, safety, and environmental protection standards.

Figure 11: Definition of CE mark

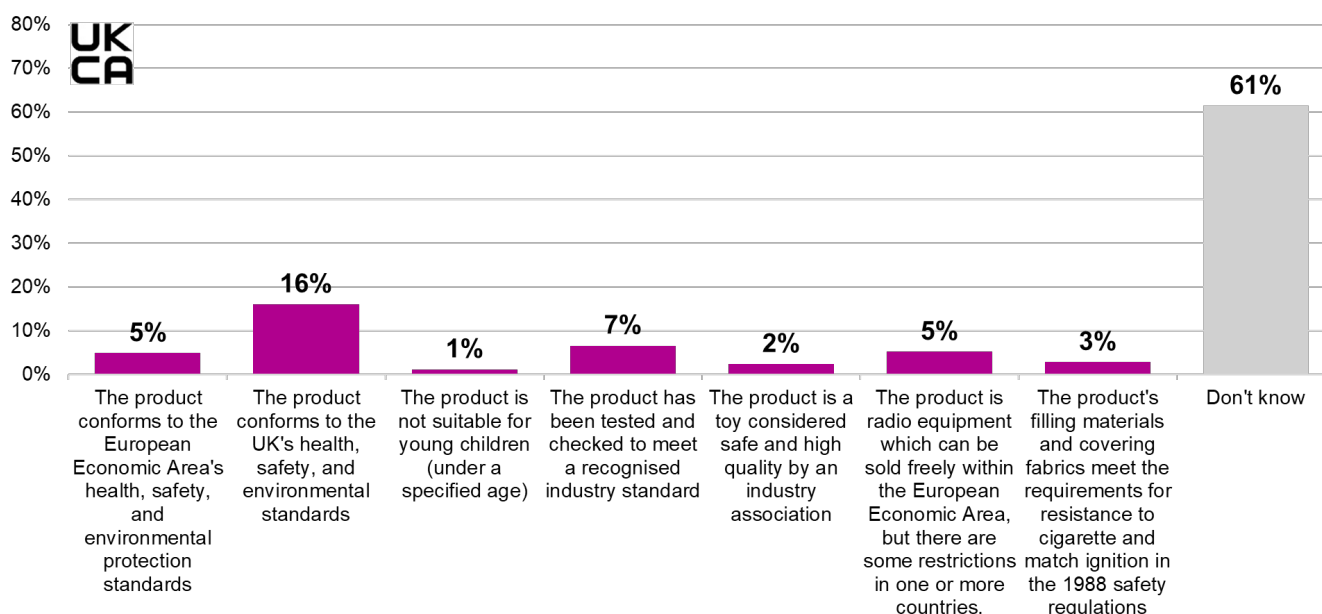


Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? CE mark.
Base: All in E-labelling section (wave two n=5,135)

Men are most likely to identify the CE mark definition (27%), compared to a fifth of women (21%). Adults with a medium (24%) or high (30%) educational attainment are more likely to select the definition, compared to 17% with low educational attainment.

One sixth (16%) of respondents identified that the UKCA mark meant that the product conforms to the UK's health, safety, and environmental standards. Those aged 18 to 29 are most likely to correctly identify this definition (21%) with awareness decreasing as respondents' age increases (17% 30 to 49; 14% 50 to 64; 13% 65+).

Figure 12: Definition of UKCA mark



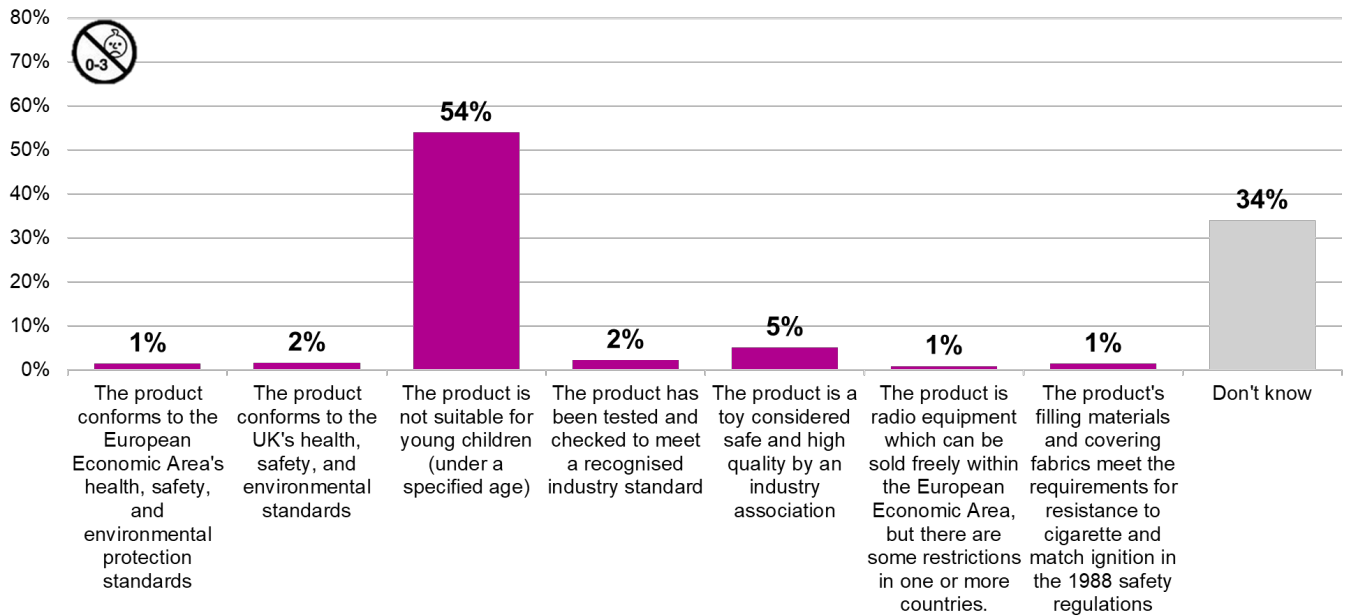
Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? UKCA mark.
 Base: All in E-labelling section (wave two n=5,135)

Those living with a disability are significantly less likely to identify the UKCA mark's definition, compared to those without a disability (12% vs 17% respectively). A similar pattern can be seen among those with a health condition, who are less likely to correctly identify it (15% compared to those without (18%).

Three in five (61%) report that they did not know they what the UKCA mark meant, this is higher among white respondents (63%), compared to BAME respondents (51%). Correspondingly, those from a BAME background are more like than white respondents to correctly identify the definition (22% vs 15% respectively).

Over half (54%) correctly identify that the baby with a line label means that the product is not suitable for young children (under a specified age), the highest level of recognition among all conformity assessment marks. There was no difference in awareness regardless of whether the respondents have a child in their household or not.

Figure 13: Definition of Age Warning Logo

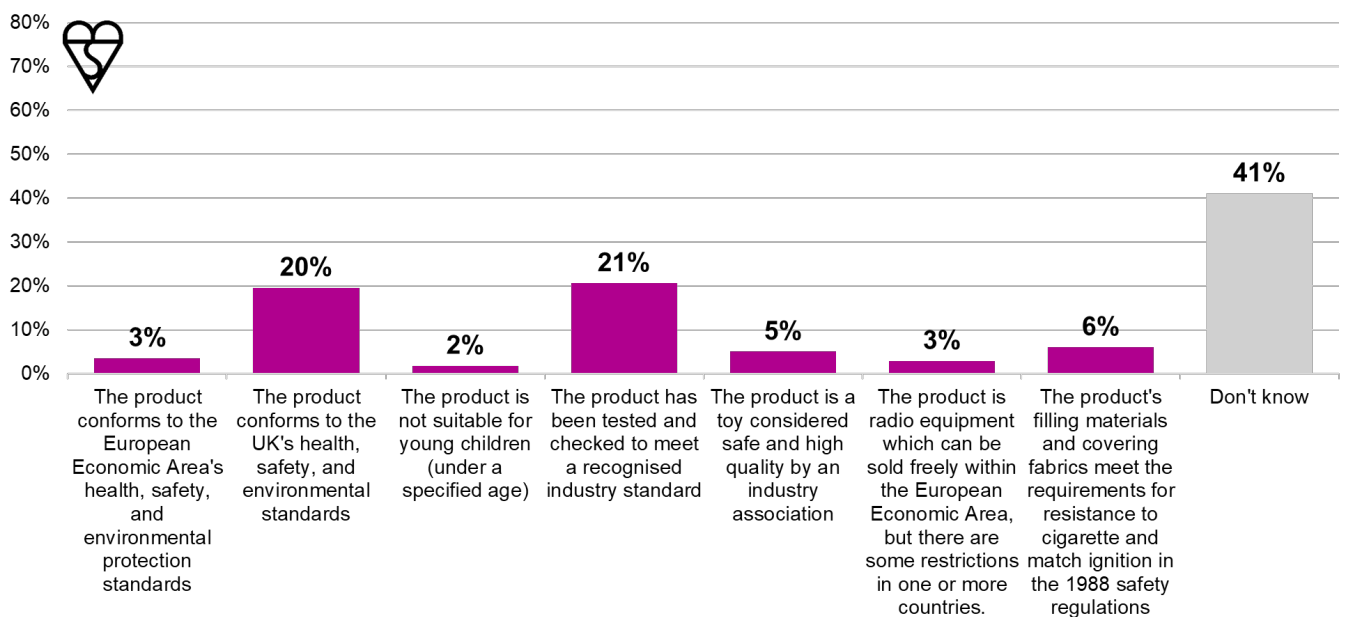


Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? Baby with a line.
 Base: All in E-labelling section (wave two n=5,135)

When looking at those who would look for the baby with a line label when purchasing a baby product, identification of the definition increases to 68%. A similar pattern can be seen when looking at those who stated they would look for this label when purchasing toys (72%).

Only one fifth (21%) of UK adults identify that the BSI Kitemark means that the product has been tested and checked to meet a recognised industry standard. Unlike the UKCA mark, those aged 50 and over are significantly more likely than younger respondents to correctly identify this definition (24% vs 17% respectively).

Figure 14: Definition of BSI Kitemark

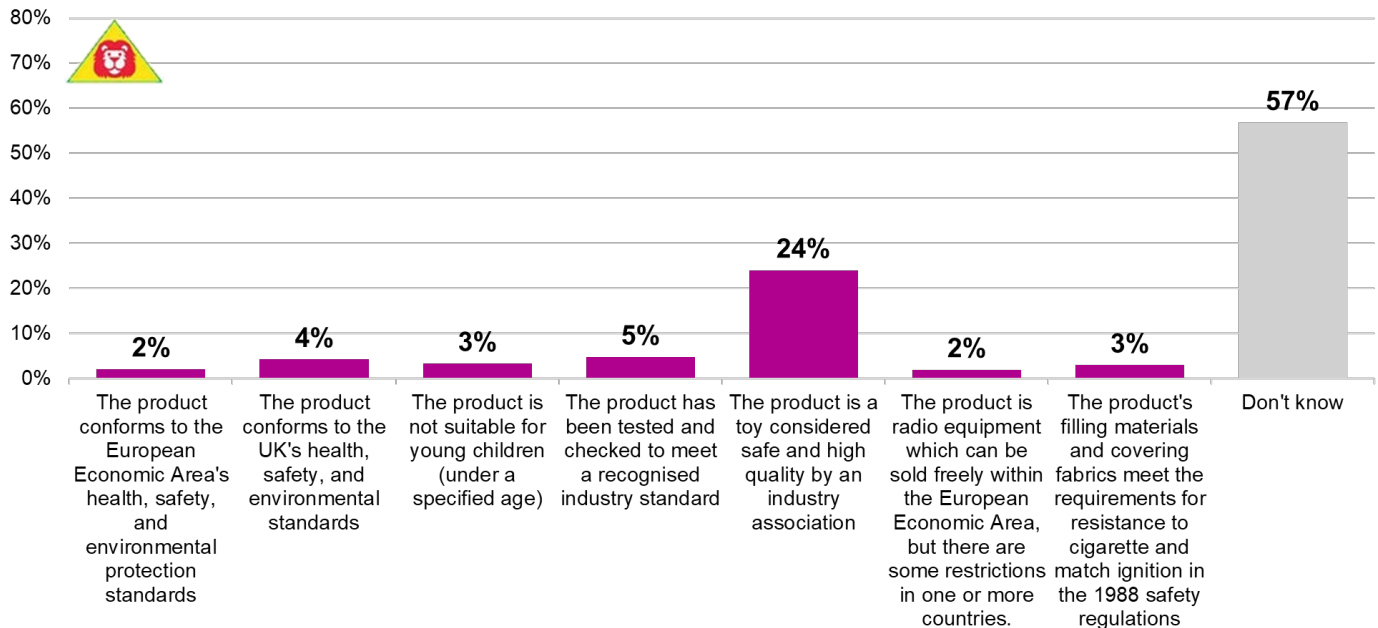


Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? BSI Kitemark.
 Base: All in E-labelling section (wave two n=5,135)

Also more likely to correctly identify the definition of the BSI Kitemark are white respondents (21%), this is significantly higher compared to those from a BAME background (16%). Those with health condition are also more likely to be aware (22% compared to 17% those without), however there is no difference among those living with or without a disability.

One quarter (24%) identify that the Lion Mark means the product is a toy considered safe and high quality by an industry association. Those with a high educational attainment are the most likely to correctly identify the definition, with just under three in ten (28%) citing this compared to one in five with a low or medium attainment (21% and 23% respectively).

Figure 15: Definition of Lion Mark

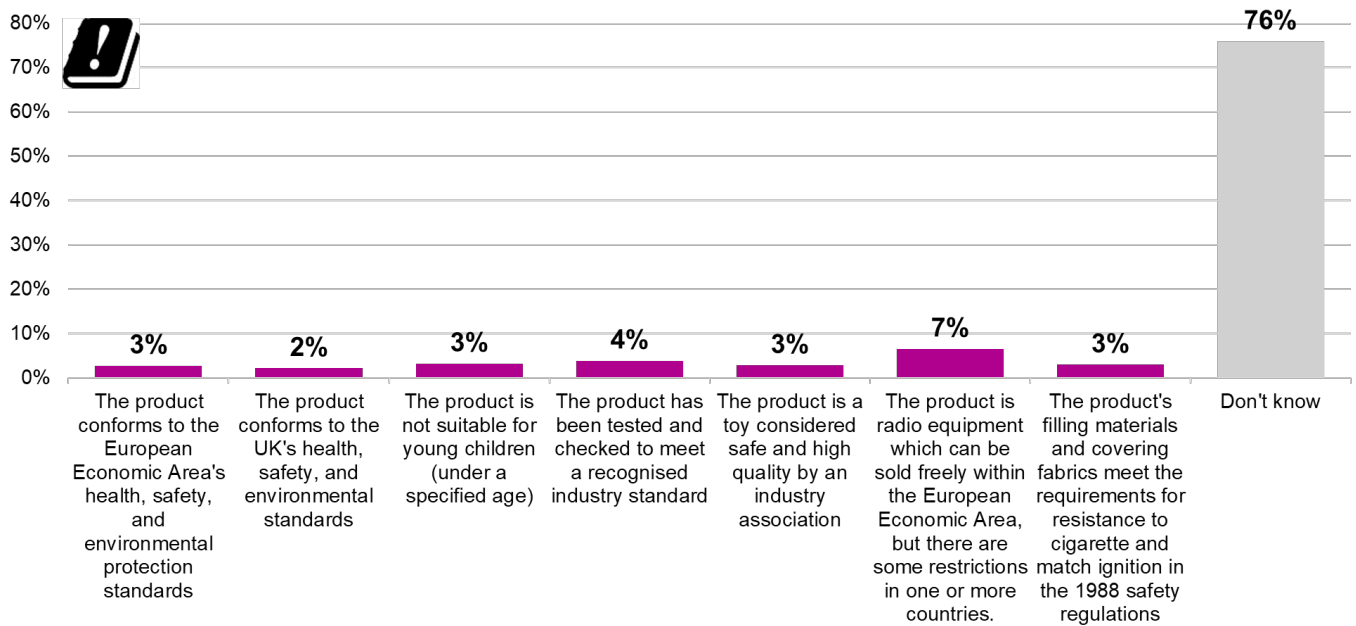


Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? Lion Mark.
 Base: All in E-Labeling section (wave two n=5,135)

Over half (53%) who stated they would look for a Lion Mark when purchasing toys correctly identified its definition. Adults with children in their household are more likely to identify the definition (26%) than those without. However, those with younger children (aged 10 and under) are less likely to be aware (26%) compared to those with children aged 16 to 18 (31%).

The pictogram mark is the least well known of the marks shown, with just under one in ten (7%) identifying that this means the product is radio equipment which can be sold freely within the European Economic Area, but there are some restrictions in one or more countries. Comparatively, three quarters (76%) report they do not know.

Figure 16: Definition of Radio Equipment Pictogram

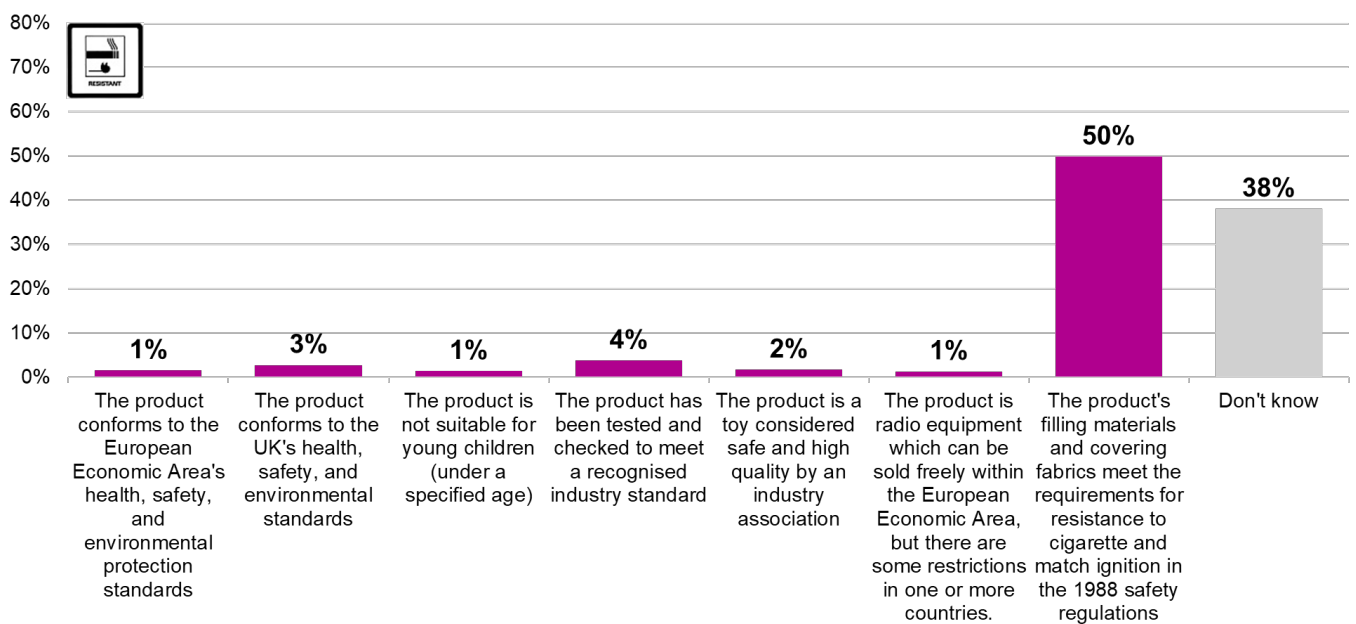


Q. Which, if any, of following definitions comes closest to what you think each of the following marks mean? Pictogram.
 Base: All in E-labelling section (wave two n=5,135)

Generally, knowledge of the definition was consistently low across audience groups, however, unlike the majority of other marks, those with a low educational attainment are significantly more likely to identify the definition compared to those of a high educational attainment (8% vs 6% respectively).

Half (50%) of UK adults correctly identify the definition of a display label as meaning the product's filling materials and covering fabrics meet the requirements for resistance to cigarette and match ignition in the 1988 safety regulations. This definition is most commonly identified by white respondents (51%) compared to just over two fifths (43%) of BAME respondents.

Figure 17: Definition of Display label pursuant to Regulation 10 FFRs (Fire Resistance)



Q. Which, if any, of the following definitions comes closest to what you think each of the following marks mean? Display label
 Base: All in E-labelling section (wave two n=5,135)

With the exception of the pictogram, adults with a higher social grade (ABC1) are most likely to correctly identify any definition when compared to those of a lower social grade (C2DE).

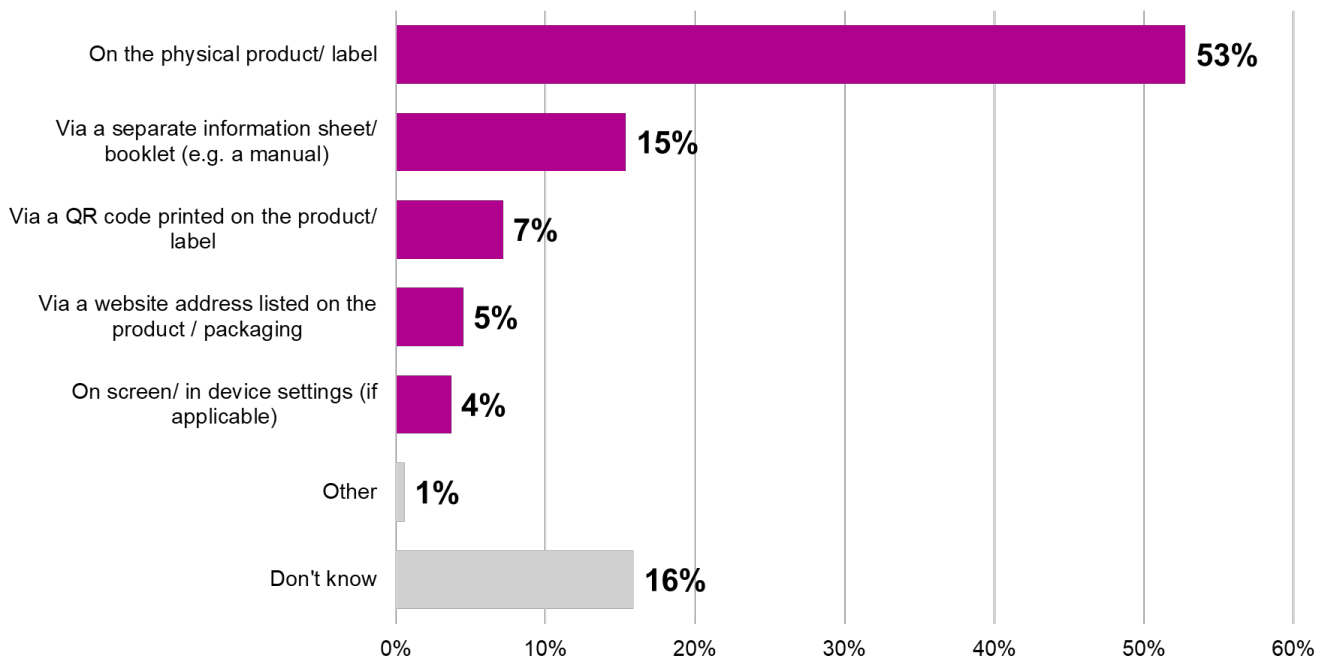
The qualitative research found that labels are valued but they do not have a significant impact on whether a product will be purchased. However, some participants commented that fire retardant furniture is definitely preferable and participants mentioned that they would be more likely to check the labelling on products they were buying for the first time or for a child.

Labelling preferences

Respondents were asked how they would best like to access safety information for electrical appliances, baby products, toys, cosmetics, white goods, and furniture/furnishings. Overall, accessing safety information through a physical product / label is most commonly cited (52%). This is largely driven by those thinking about furniture/furnishings (58%), which is significantly higher than electrical appliances (52%), cosmetics (52%) and white goods (47%).

This is followed by a fifth reporting they would prefer to see the information through a separate information sheet/booklet. Those who were asked to think about white goods and electrical appliances are more likely than any other group to state this (21% and 19% respectively). Comparatively, this sits at just over one in ten for all other products (12% toys; 12% cosmetics; 14% baby products; 14% furniture and furnishings).

Figure 18: Preference for labelling for safety information



Q. In which ONE, if any, of the following ways would you prefer to access safety information about [product]?
 Base: All in E-Labeling section (wave two n=5,135)

Under one in ten (7%) report that they would like to access safety information through a QR code printed on a product label, and this is consistent across the different product types (9% toys; 8% white goods; 7% furniture/furnishings; 7% cosmetics; 6% baby products; 6% electrical appliances).

Those aged 18 to 29 are the most likely age group to prefer finding out via a product screen / device setting (7%), this is significantly higher than any other age group. Those under 50 are the most likely to prefer labelling via a QR code printed on the product/ label (9% 18 to 29, 9% 30 to 49). Preference of QR codes then drops to 6% of those aged 50 to 64 and only 4% of those aged 65 and over. Similarly, BAME respondents are also the most likely to prefer these methods: 10% cite through a QR code (compared to 7% white respondents) and 7% cite through on screen / in device setting (compared to 3% white respondents).

- Those living with a disability are significantly less likely than those who aren't to identify a preference for accessing information through a QR code (6% vs 8% respectively).
- Adults with a lower social grade (C2DE) are also less likely to select this method (6%) compared to 8% of ABC1s.
- Those whose first language is not English are more likely to show a preference for accessing information through the product screen or label (9%) compared to those whose first language is English (3%).

Many qualitative participants commented that accessing labelling digitally would add friction to the safety checking process, making it unlikely they would check it. A minority of those in the younger group stated that a digital label would be useful.

"I would find it useful if there was, say, a QR code which explained which logos the product has and what they mean" (18-35 year old)

Explicit labelling on or in phones is not appealing for most, they would prefer this to be less intrusive, only being included in settings. A few worry that those who are not digitally savvy would struggle to access this information.

"Seems like an extra step to have to search for it digitally" (18-35 year old)

"How would you know what it [a digital label] actually referred to? What about people without smart phones?" (61+)

"That's too intrusive. I think my phone has the CE mark engraved onto the back of it. It's discreet but there to reassure. If I had to look at the Apple logo and a CE/UKCA mark every time I turned my phone on, then wait for it to boot up, I'd lose the will!!!!!" (35-60 years old)

"I think we have a lot of digital tracking as it is, so not sure as many people are not that tech savvy." (35-60 years old)

Experiences of safety issues

Key findings

- One in ten have had a safety issue with an item they purchased in the last six months. Safety issues are most common amongst those who purchased changing tables (23%), extractor fans (20%), and musical instruments (18%).
- On average, where one is the least serious issue and 10 the most serious, those who experienced a safety issue rate the seriousness as 4.32. Perceived seriousness appears to be falling as respondents in wave two are more likely than wave one to give the lowest possible seriousness score.
- The most commonly reported impact of safety issues continues to be stress (20%) followed by physical harm (15%) and damage to property/ household items (12%).
- Most people do take some form of action when they experience a safety issue (71%). The most common action to take after experiencing a safety issue remains returning the item to the seller for a refund/ exchange (20%).
- 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%).
- The actions taken are consistent with wave one; the most common is to return the item for a refund/ exchange (20%).

Seriousness of safety issues

Of those who bought a product within the last six months, one in ten had a safety issue with that product (10%), a marginal increase from the incidence observed in wave one (8%). In wave two the items respondents are most likely to experience a safety issue with are a changing table (23%), extractor fan (20%), and musical instruments (18%).

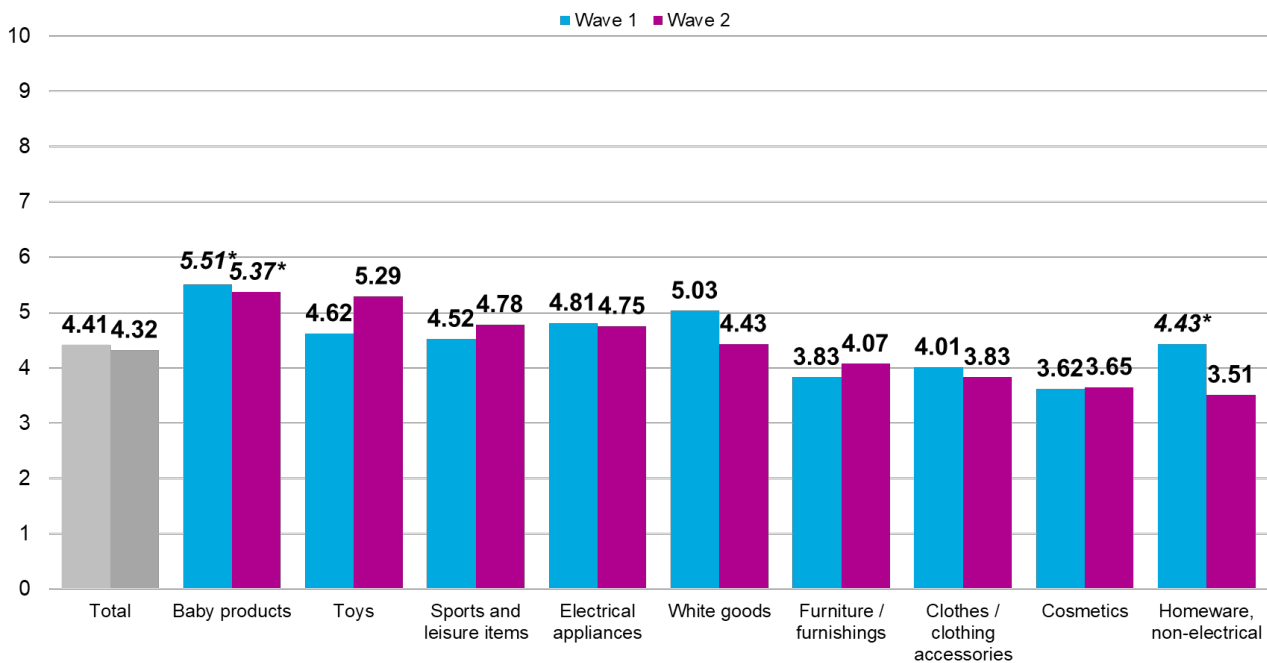
Although the prevalence of safety issues with some items has risen, the seriousness of those safety issues has not. On a scale of one to ten, where one represents respondent's perception of the least serious type of issue and 10 the most serious – on average, individuals rate their safety issue with the product they purchased as just below the midpoint at 4.32. Issues with baby products (5.37) continue to be perceived as more serious than other product categories. Those who experienced an issue with non-electrical homeware give the lowest average rating of seriousness in wave two (3.51).

In fact, the perceived seriousness of safety issues appears to be falling. Just under three in ten respondents (28%) give the lowest possible seriousness rating (one out of ten), a significant rise compared to wave one (24%). Two-fifths of those who experienced an issue with non-electrical homeware give it the lowest possible seriousness rating (40%) as did a similar proportion of those who experienced an issue with clothes/ clothing accessories (38%).

As previously seen, those aged 30 to 49 give their safety issue the highest average rating on the scale of seriousness (4.60).

- Those from the highest social grades rate their safety issues as more serious than those from lower social grades (4.63 AB social grade vs 3.99 DE).
- Black, Asian, and minority ethnic (BAME) individuals give a higher average rating for their issue (5.11) than individuals from a White background (4.06).
- People with a disability which limits their day-to-day life a lot give a higher average rating for their safety issue (5.01) than those with no disability (4.09)
- Those with caring responsibilities give a higher average rating (4.92) than those with no caring responsibilities (4.09)

Figure 19: 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 (W1=591; W2=783), product asked about: baby products (W1=29*; W2=41), toys (W1=61; W2=62), white goods (W1=50; W2=66), electrical appliances (W1=110; W2=120), cosmetics (W1=79; W2=122), sports and leisure items (W1=67; W2=90), furniture/ furnishings (W1=62; W2=90), homeware (W1=47*; W2=63), clothes/ clothing accessories (W1=86; W2=129)

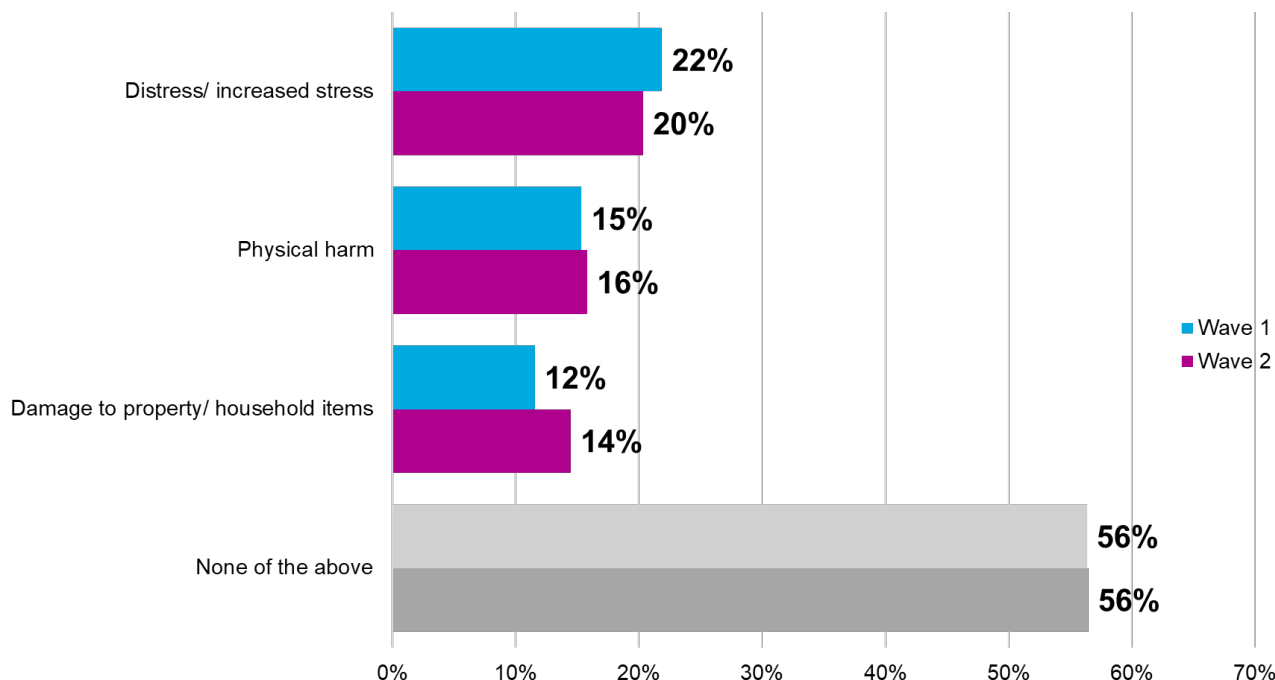
*Note: small base, treat with caution

Impact of safety issues

Consistent with the previous wave, the most commonly reported impact of a safety issue is stress (figure 22). A fifth of those who have experienced a safety issue with the product they purchased say they experienced distress/ increased stress as a result, while one in seven (16%) report physical harm and a similar proportion report damage to property/ other household items (14%).

Those who experienced an issue with either baby products or toys are now the most likely to report physical harm (both 23%), while harm from cosmetics has fallen compared to wave one (23% vs 33%). Damage to property/ household items as a result of a safety issue with toys has risen compared to wave one (26% vs 11%), making it now the most likely issue to cause this.

Figure 20: 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 (W1=591; W2=783)

The outcomes of the harm experienced as a result of safety issues are similar to those seen in wave one. Of those who experienced physical harm, over a third did not need any aid or healthcare (37%) while three in ten required first aid such as a plaster or compression bandage (30%). One in eight required urgent medical attention such as Accident and Emergency (15%) and one in ten needed non-urgent medical attention such as visiting their GP (10%). A further 3% sought tertiary medical attention such as specialist or prolonged healthcare as a result of their safety issue.

Similarly, the most common forms of property damage experienced as a result of safety issues remain dents/ scratches (38%), followed by over a quarter who experienced electrical damage (27%). Fewer than a fifth of those who experienced property damage as a result of safety issue say it resulted in smoke damage (18%), flood damage (14%), or fire damage (13%). The typical (median) value of the damage and any repairs needed was £80, compared to £100 in wave one.

Actions as a result of safety issues

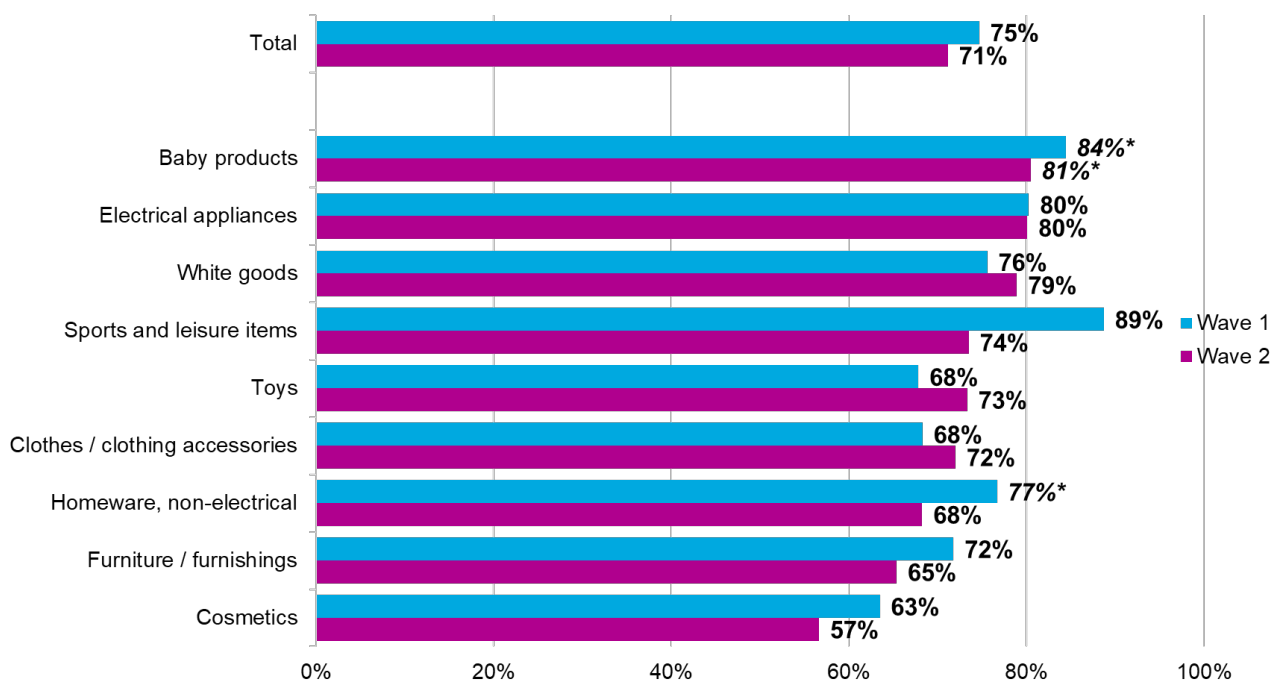
When faced with a safety issue, the majority of the UK public do take some form of action (71%), although this does vary depending on which product category an individual experienced a safety issue with. The likelihood of taking action as a result of an issue with a sport or leisure item has fallen compared to wave one (74% vs 89%), meaning that those who experienced an issue with baby products are the most likely to take action in wave two (81%). Those who experienced a safety issue with cosmetics continue to be the most likely to take no action at all (35%).

Consistent with wave one, young people are more likely than older people to take action as a result of a safety issue – three quarters of those aged 18 to 29 say they did so (77%) compared to less than two thirds of those aged 65 and over (63%).

Additionally, those who give their safety issue a score of eight or more out of ten for perceived seriousness continue to be more likely to take action to those who only give their issue a score of three or less (82% vs 62%).

- Black, Asian, and minority ethnic (BAME) individuals are more likely to take action compared to people from a White background (81% vs 68%).
- Those with a disability that limits their day-to-day life a lot are more likely to take action as a result of a safety issue compared to those without a disability (79% vs 69%)
- People with caring responsibilities are more likely to take action than those without (77% vs 69%)
- Those who do not speak English as a first language are more likely to take action than those who do (80% vs 69%)

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



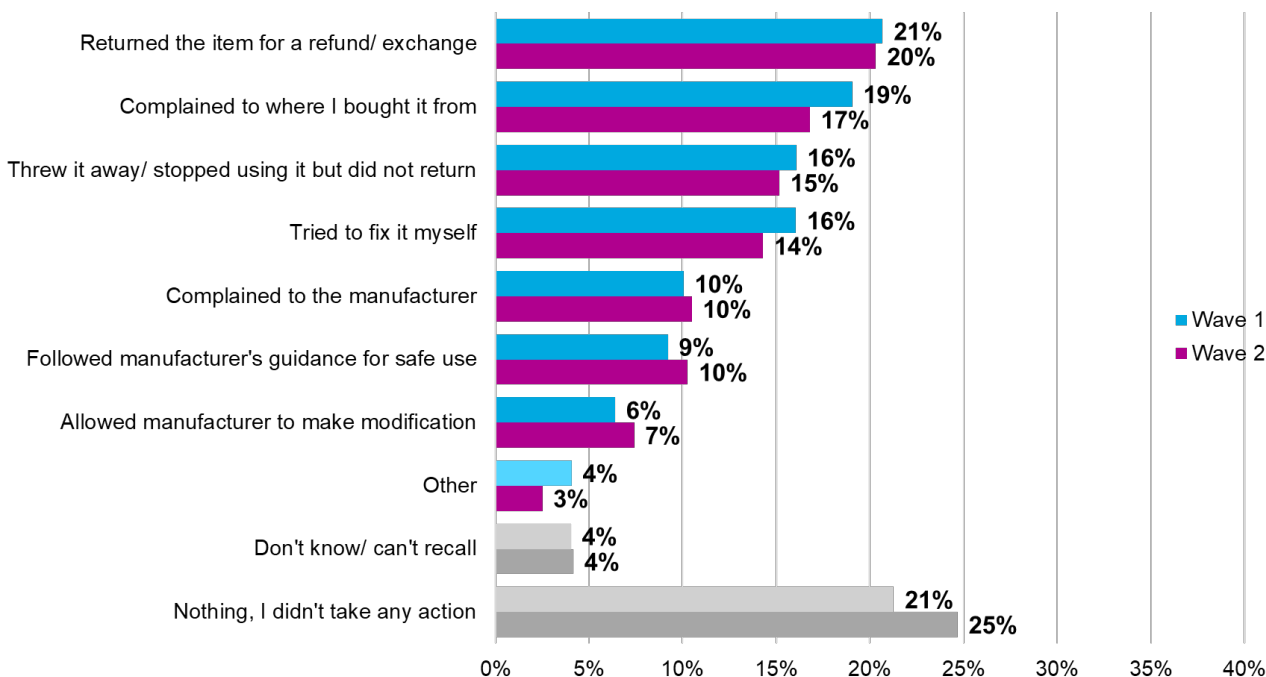
Q: Which of the following actions did you take after becoming aware of the safety issue with the following product:
 Base: All who experienced a safety issue with a listed product: total (W1=591; W2=783), product asked about: baby products (W1=29*; W2=41*), toys (W1=61; W2=62), white goods (W1=50; W2=66), electrical appliances (W1=110; W2=120), cosmetics (W1=79; W2=122), sports and leisure items (W1=67; W2=90), furniture/ furnishings (W1=62; W2=90), homeware (W1=47*; W2=63), clothes/ clothing accessories (W1=86; W2=129)
 *Note: small base, treat with caution

As Figure 22 shows, the actions undertaken when faced with a product safety issue have not changed compared to wave one. The most common action an individual takes is to return the item for a refund/ exchange (20%), followed by complaining to the seller (17%). There appears to be a slight rise in the proportion of people who do not take any action but this difference is marginal and not significant.

In wave one, there was a clear age trend for whether an individual attempted repair themselves – with younger respondents more likely to do so. In wave two, there are no longer significant age differences for whether an individual attempts a repair themselves. However, those under 30 are now much more likely to allow a manufacturer to make modifications than they were in wave one (14% vs 6%) – making them the most likely age group to do this.

Black, Asian, and minority ethnic (BAME) individuals are more likely than their white counterparts to complain to the seller (25% vs 14%) or follow the manufacturers guidelines for safe use (15% vs 9%). Individuals from a white background continue to be more likely than BAME to not take any action (28% vs 14%).

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



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

When all respondents who did not take action were asked why not, a quarter say the safety issue was not important enough (24%). One in seven say the safety issue resolved without the need to act (14%). These are both broadly consistent with the findings in wave one. However, there has been a notable drop in the proportion of people who think that taking action would not have made a difference (12% vs 21%). Women in wave two particularly saw a fall in thinking it would not have made any difference (10% vs 23%).

Perceptions and experiences of product recalls

Key findings

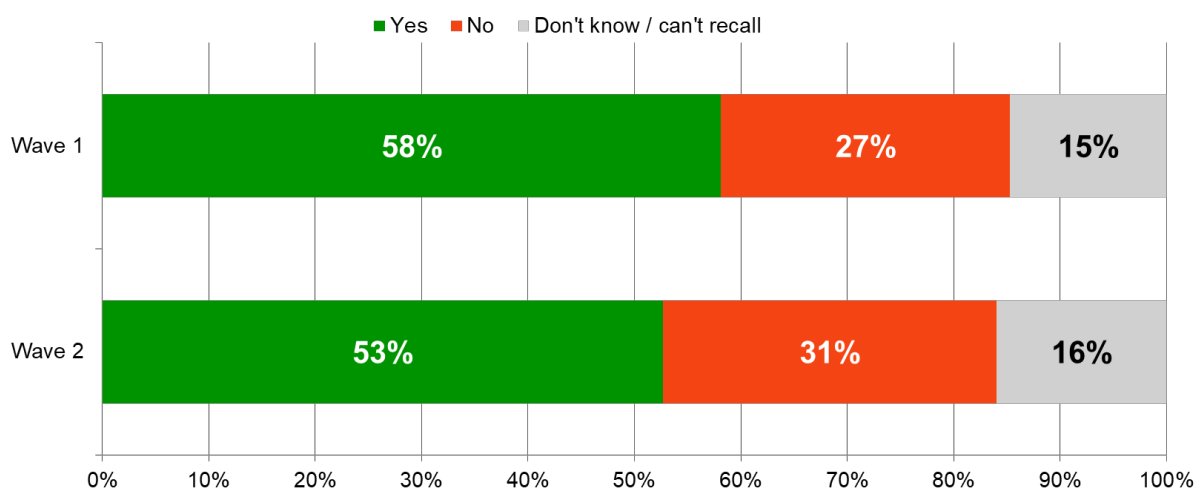
- Awareness of product recalls or safety notices of consumer products⁵ remains consistent between wave one (58%) and wave two (53%).
- Of those who were aware, one in ten (10%) had seen or heard one for a product they own. This is stable wave on wave.
- White goods continue to be the most commonly identified recalled product for something respondents own, with one third (34%) citing this in wave two. However, unlike other products it was the only one to see a significant decrease compared to wave one (45%).
- The most common sources for hearing about a product recall or safety notice continue to be the media (32%), directly by a seller (27%), or by a manufacturer (18%).
- The proportion who report they were contacted directly by a seller has increased significantly from wave one (18%).
- One in three (31%) report returning the item for a refund / exchange after seeing or hearing the recall. One quarter (24%) report following the manufacturer's guidance for safe use and one in five (22%) allowed the manufacturer to make modifications for the product.
- Those who heard about their recall through information from the Government or by being contacted directly by the manufacturer are the most likely to report that they allowed the manufacturer to make modifications to the product (42% and 40% respectively).

Attitudes towards product recalls

In wave two, it remains that the majority (53%) of the UK public report seeing a product recall or other safety warning for a consumer product (excluding food, pharmaceutical, or vehicle product recalls) in the last two years. However, this is a significant decline on the proportion seen in wave one (58%). Conversely, corresponding increases are evident in wave two for those stating they had not seen a recall (31%) or that they are unsure (16%).

⁵ Excluding food, pharmaceutical, or vehicle product recalls.

Figure 23: 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 (wave one n=10,230; wave two n=10,296)

As in wave one, those aged between 18 and 49 years old are the most likely to report having seen a recall (56%), this is significantly higher than those aged 50+ (49%). Although the decline is evident across all age groups when compared to wave one (60% 18 to 49; 56% 50+). One fifth of those aged 65 and over report they don't know if they have seen or heard about a product recall in wave two (21%), this is significantly higher than any other age group.

- In wave two, those living with a disability also report higher levels of uncertainty, with one in five (19%) reporting that they don't know or can't recall, compared to one in six (15%) of those without a disability.
- This is also the case for those with a health condition (17%) compared to 14% of those without.
- Over half (58%) of adults with caring responsibilities report seeing a recall, this is significantly higher than those without (50%).

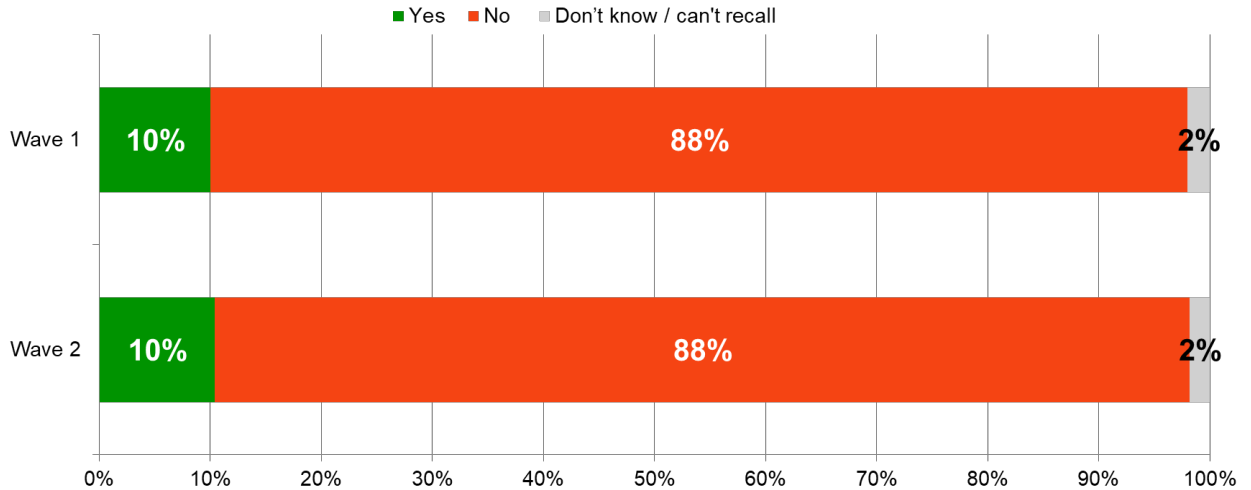
As seen previously, those with a high educational attainment are the most likely to report seeing a product recall in the last two years (59%), compared to those with medium (52%) or low (46%) educational attainment, suggesting a link between education and awareness. Similarly, respondents with an ABC1 social grade are more likely than those with a C2DE social grade to report seeing a recall (55% vs 50% respectively). While C2DE respondents are more likely to be unsure (18%) compared to ABC1s (14%).

As in wave one, the offline population are more likely to report not seeing a recall in the past two years (44% wave one; 48% wave two) compared to close to one in three in the online survey (27% wave one; 31% wave two). They also show a higher level of certainty around recollection of recalls, only 7% report being unsure of whether they have seen or heard one, compared to 16% of the general public. However, this does represent a significant increase for the offline population, with 2% previously reporting they did not know in wave one.

Experience of product recalls

Of those who were aware of product recalls, the proportion reporting they have seen a recall for a product they own in the last two years remains consistent at one in ten (10%).

Figure 24: Awareness of seeing a product recall relating to an owned product



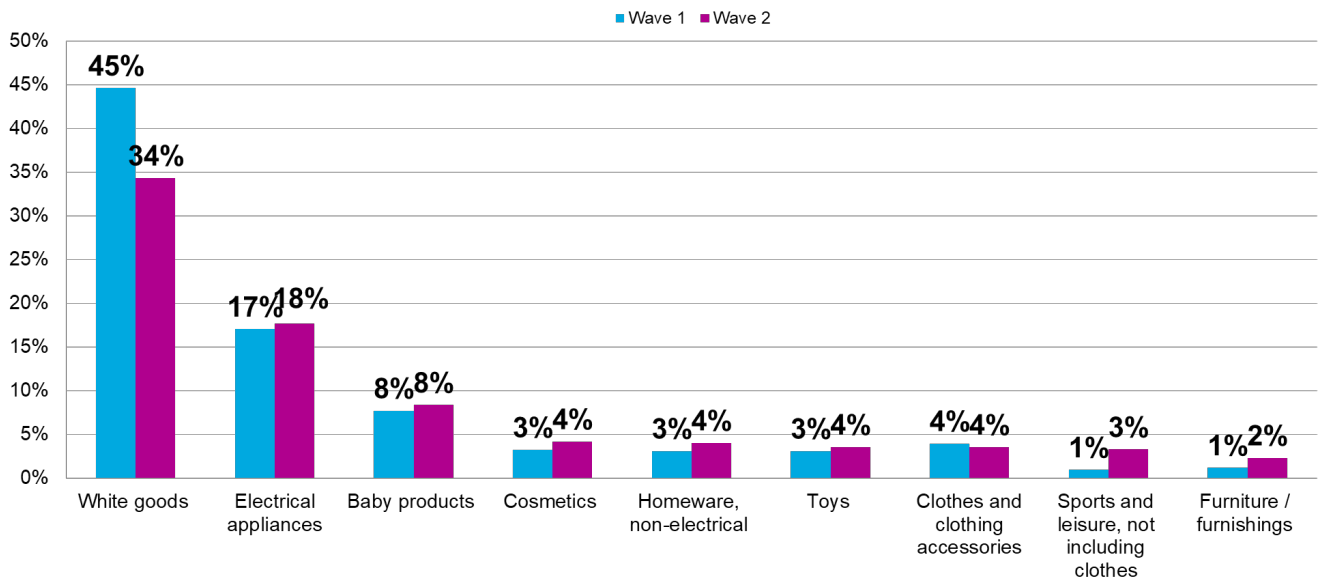
Q: And in the past two years, have you ever seen a product recall notice or other safety warning about something you own?
 Base: All respondents who have seen or heard about a recall (wave one n=5,948; wave two n=5,539)

- For wave two, although awareness of product recalls was consistent between respondents of a white or BAME background, BAME respondents are significantly more likely to report that they have seen a recall for a product they owned (13%) compared to white respondents (9%).
- This is also the case for those who are limited by a disability: although this audience reported higher levels of uncertainty at an overall level, those who have seen a recall are more likely to state that it was for a product they owned (13%), compared to those without a disability (8%).
- Following their increased awareness generally, those with caring responsibilities are also more likely to report they have seen a recall for a product owned (14%), in comparison to 8% of those without.

As with wave one, while respondents with high educational attainment are more likely than any others to report being aware of a product recall, respondents with low (11%) and medium (10%) educational attainment are more likely than highly educated respondents (8%) to report seeing a recall for a product they own.

White goods continue to be the most commonly identified product recalled (34%), although unlike other products, it was the only one to see a significant decrease in identification in wave two (from 45% in wave one). As in wave one, white respondents are most likely to identify seeing a recall for a white good (38%), compared to 17% BAME respondents, although both groups saw a significant decline in identifying this product type compared to wave one (47% white respondents, 33% BAME respondents). As before, electrical appliances (18%) and baby products (8%) follow as the most reported recalled products.

Figure 25: Type of products owned seen in recall notices



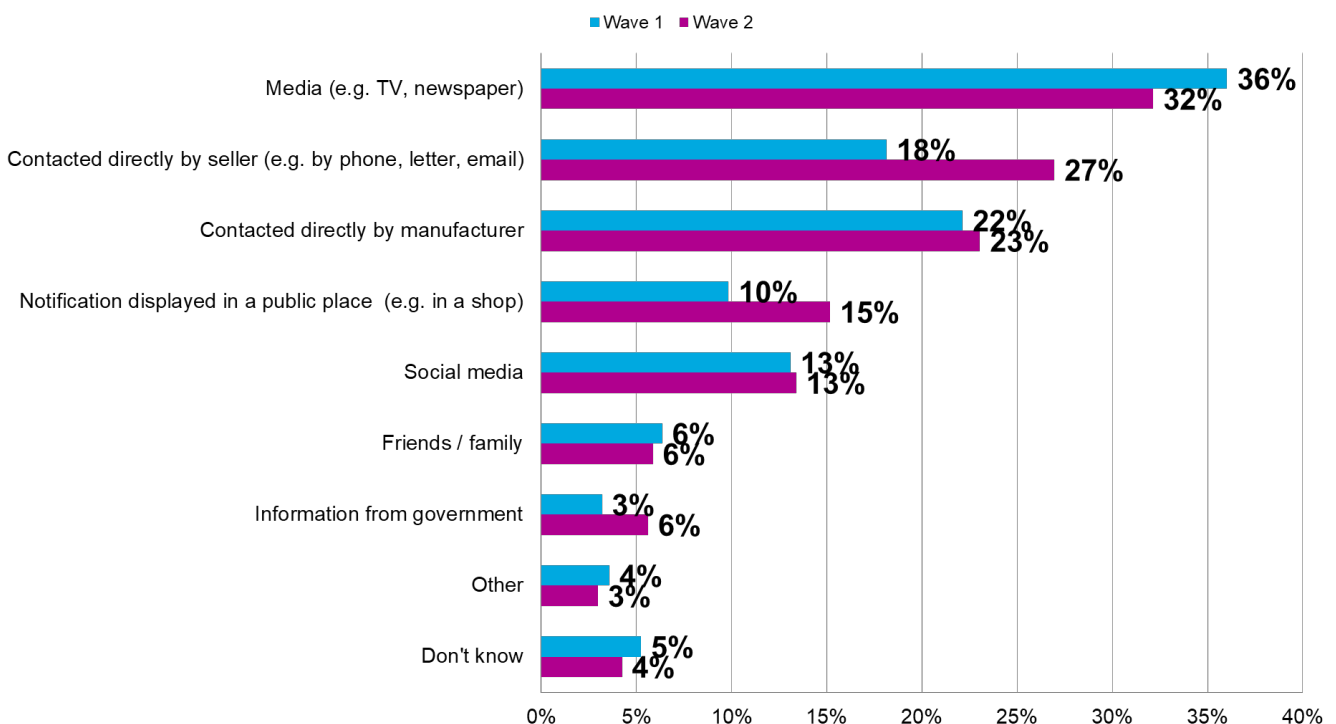
Q: What type of product was it that you saw a product recall notice for?

Base: All who saw product recall notice for something they own (wave one n=620; wave two n=514)

In wave two, nearly half (49%) of adults aged 50 and over are the most likely to report being aware of a recall notice for white goods that they own compared to a quarter (25%) of those aged 18 to 49. Respondents from an ethnic minority background are most likely to report seeing a recall for sports and leisure items (12%) furniture or furnishings (7%) that they own.

The most common source for hearing about a product recall or safety notice continues to be through the media (32%), followed by a quarter (27%) reporting they were contacted directly by the seller, a significant increase compared to wave one (18%). 23% report they had been contacted by the manufacturer, in line with previous waves.

Figure 26: Hearing about recall for product owned



OPSS Public Attitudes Tracker: Wave Two

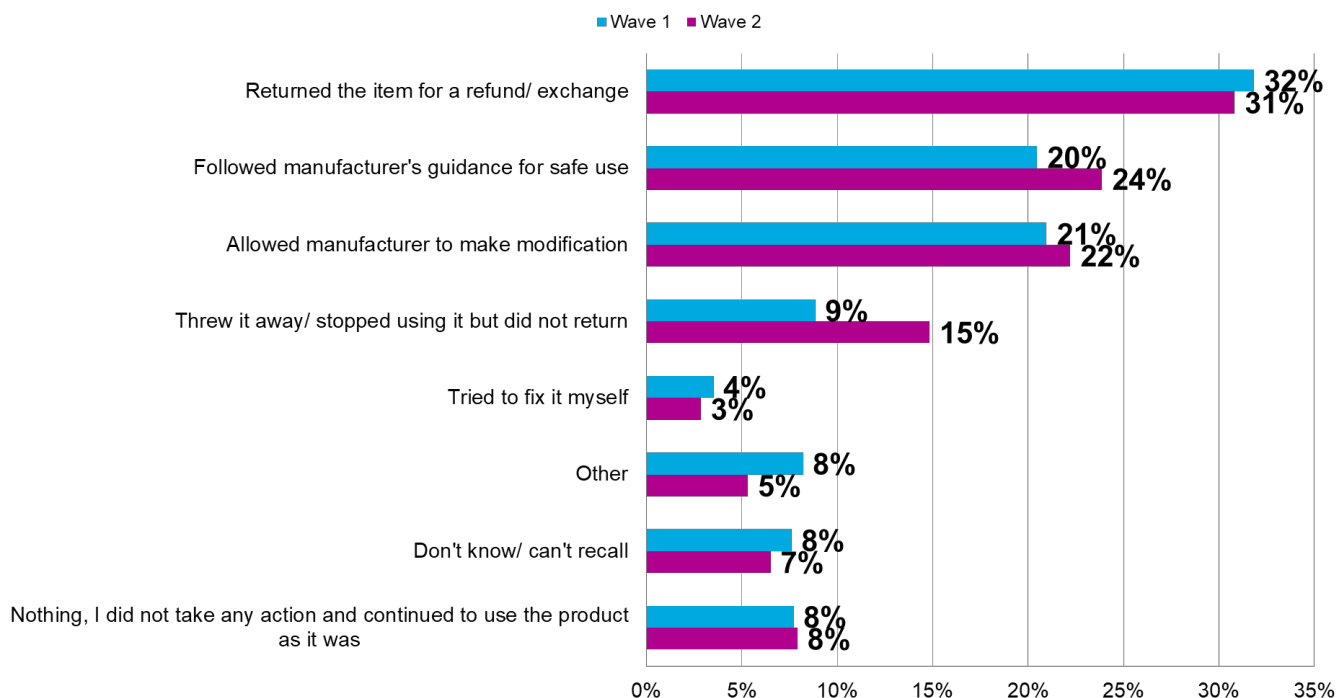
Q: Where did you hear about the product recall notice, or other safety warning?

Base: All who saw product recall notice for something they own (wave one n=620; wave two n=514)

Compared to wave one, the proportion who reported they were notified through something displayed in a public place increased significantly (15% vs 10%), and this was most commonly reported by those aged 18 to 49 years old (19%) compared to those aged 50 and over (10%). Comparatively, those aged 50 and over are more likely to report being contacted directly by a manufacturer (32%).

After seeing a product recall or safety notice, one in three (31%) report returning the item for a refund or exchange, which is consistent with wave one. This is followed by a quarter (24%) who report following the manufacturer's guidance for safe use, and a fifth (22%) who allowed the manufacturer to make modifications to the product. It remains that 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 27: 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 (wave one n=620; wave two n=514)

The proportion who report throwing the product away or stopping using it increased from 9% to 15%, and this was largely driven by those aged 18 to 29 (25%). Comparatively, one in ten (9%) of those aged 65 and over reporting doing this, which is a significant increase for this age group since wave one (2%). Possibly linked to this, those living with children are also more likely to report throwing the product away (19%) compared to those who are not (11%).

- It remains that those who are living with a disability are more likely to report trying to fix it themselves (9%), significantly higher than those without a disability (2%).
- Those with a low level of educational attainment (0%) are much less likely than those with medium (3%) or high attainment (5%) to report trying to fix it themselves.

Those who heard about their recalled product through information from the Government or those who were contacted directly by the manufacturer are most likely to report allowing the manufacturer to make modifications to the product (42% and 40% respectively). They are significantly less likely to report doing nothing (0% and 2% respectively), compared to those who found out through a notification in a public place (13%), social media (11%) or the media (8%).

Those who had white goods recalled most commonly report either following the manufacturer's guidance for safe use (38%) or allow the manufacturer to make modifications to the product (33%). Comparatively, those who saw a recall for baby products (47%) and electrical items (44%) most commonly report returning the item for a refund or exchange.

Perceptions and experiences of product registration

Key findings

- A third of those who purchase an eligible product register it (32%) and uptake remains highest for white goods (58%).
- Those who purchased a dishwasher specifically are more unsure of their registration status in wave two compared to wave one (18% vs 9%)
- The most common reason for registering a product is still to validate a warranty (72%). There has been a significant fall in the proportion of people registering an eligible product to receive information and updates (26% vs 35%).
- Almost all of those who registered a product found the product registration process to be easy (93%). However, those who registered their item via an app in wave two are more likely than those in wave one to have found the process difficult (10% vs 0%).
- The most common reason to not register an eligible product is not wanting to/ not thinking it necessary (37%). Those who bought and did not register white goods are less likely than before to say they did not know they could register their item.
- Those that do not think registration is necessary continue to say there is no benefit to registration (44%). Respondents in wave two are more aware of the risks of safety issues and recalls, particularly for electrical appliances or sports/ leisure items.
- There is sustained appetite for clearer guidance on how to register the product or what the benefits are. In wave two, there is a marked increase in a desire for guidance from the government specifically.

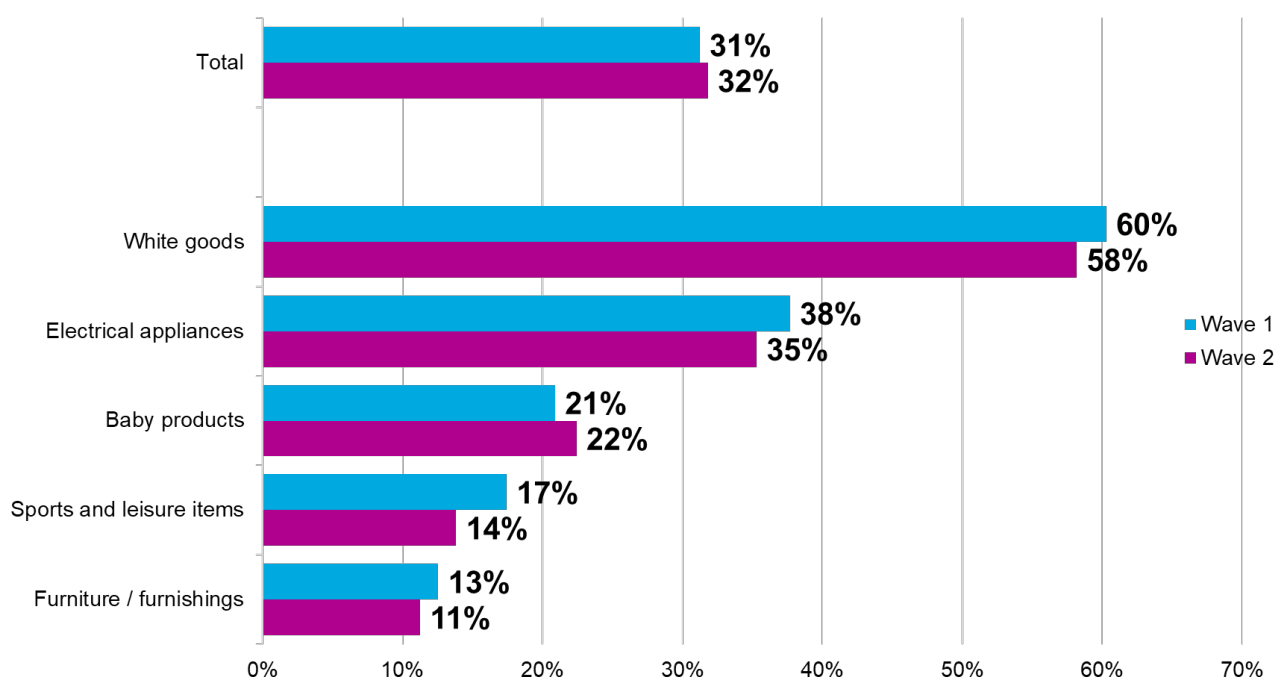
Experiences of registering an eligible product

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

Around a third of individuals who bought an eligible product registered it (32%) and uptake remains highest for those who have purchased a white good (58%). Around a third of those who bought an electrical appliance registered it (35%) and a fifth of those who bought selected baby products (22%) did so. One in seven of those who bought an eligible sports and leisure item registered it (14%) and only one in ten of those who bought eligible furniture/ furnishings (11%). These figures are broadly unchanged when compared to wave one.

When looking at specific product items, individuals who bought an oven (65%) or washing machine/ combined washer-dryer (63%) are the most likely to register their purchase. Those who purchased a car seat continue to be the most unsure about whether they registered the item or not (20%). Previously, those who had purchased a dishwasher were among the most likely to have registered their item – in wave two, respondents are notably now more unsure than they were before (18% vs 9%).

Figure 28: Proportion who registered product, by product category



Q: Product registration involves providing your details and model details to the manufacturer when you bought it so that they could contact you if a safety issue was later identified with your make/model of product. Did you register the [product] when you bought it?

Base: All who purchased an eligible item in the last six months: total (W1=3,425; W2=3,120), product asked about: electrical appliances (W1=1,039; W2=1,235), baby products (W1=292; W2=107), white goods (W1=674; W2=676), furniture/ furnishings (W1=798; W2=668), sports and leisure items (W1=622; W2=434)

Consistent with wave one, those with high education levels are generally less likely to register their product than those with medium or lower education levels. Just under three in 10 of those with high education levels registered their product (28%), compared to over a third of those with medium (33%) or lower education levels (35%) – reinforcing the perception that education is not a barrier to product registration.

The upward trend by age that was shown in the previous wave is also evident. In wave two, a fifth of 18 to 29 year olds registered their product (19%), over a quarter of 30 to 49 year olds (27%), a third of 50 to 64 year olds (32%) and almost half of those aged 65+ (48%). As discussed in wave one, this may in part be due to the types of product purchased across age – for example, those aged 18 to 29 are the least likely to purchase white goods (9%).

As referenced in wave one, younger respondents who were asked about white goods are still less likely to register them than any other age group who made the same purchase (35%, 50% for those aged 30 to 49, 57% for those aged 50 to 64, 75% 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, consistent with wave one, in the general population those people who own their home (63%) are more likely than those who rent their home (46%) to say they did register their product.

- Those with no children in the household are more likely to register their product than those with children (33% vs 28%)

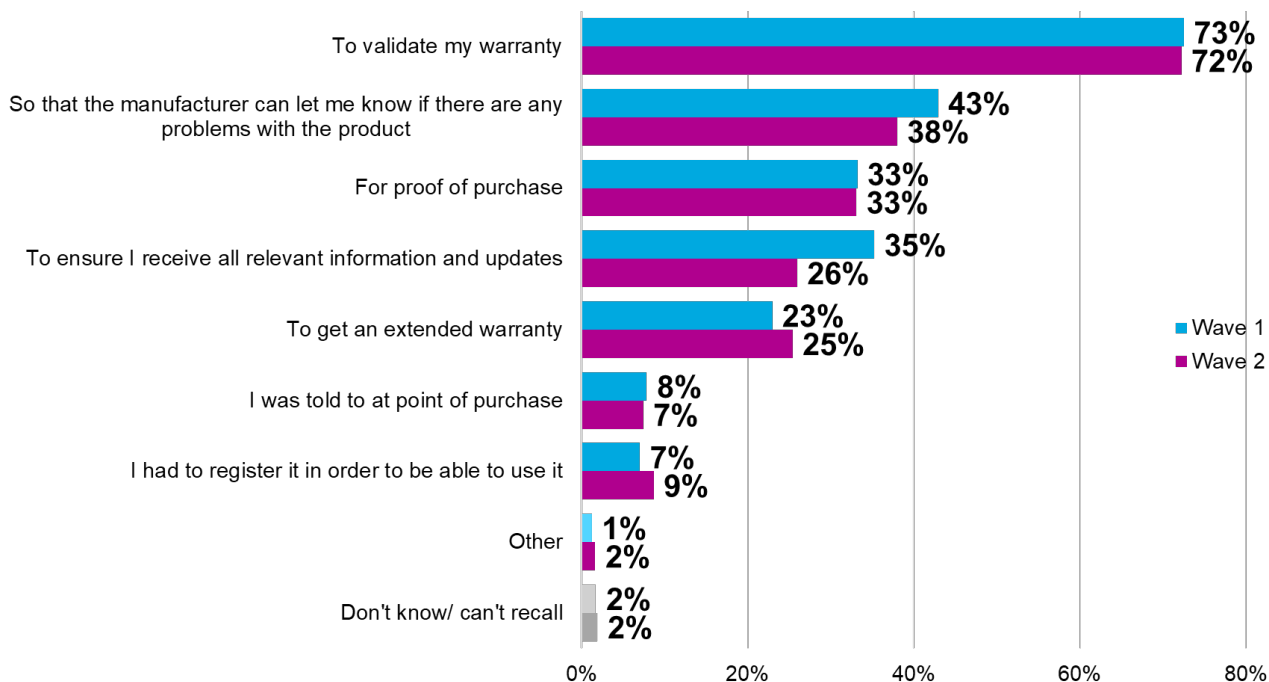
- People with a disability or health condition that limits their day-to-day life are more likely to register their product than those without a disability (38% vs 29%)
- There is no variation in registering products between those from social grades ABC1 and C2DE

The main reason for registering an eligible product is to validate a warranty (72%) and this is consistent wave on wave. Product safety is a consideration, with a third of respondents registering their product so that the manufacturer can let them know if there are any problems (38%). However, this has dropped slightly since wave one (43%). There has also been a significant fall in the proportion of people registering their product to receive relevant information and updates (26% vs 35%).

Men in particular are now less likely to say they register a product to receive relevant information and updates (27% vs 40%). Those with a disability which limits them in day-to-day life are also less likely than they were in wave one to cite this as a reason for registering their product (28% vs 38%)

There remains an upward trend by age for registering a product in order to validate the warranty, with less than half of those aged 18 to 29 (44%) compared to four in five of those aged 65 and over (83%). Similarly, the oldest respondents are still the most likely to register so the manufacturer can get in touch (48%). Younger respondents continue to be the most likely to register because they had to in order to use the product (14%).

Figure 29: Reasons for registering product



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

Individuals who purchased white goods remain the most likely to register in order to validate the warranty (81%). The proportion who say they registered a white good in order to let the manufacturer contact them in case of problems has fallen significantly compared to wave one (44% vs 51%). However, this is still higher than other product categories.

Those who purchased sport and leisure goods are no longer the most likely to register their product for proof of purchase as this has also dropped in wave two (28% vs 47%). In wave two, those who bought furniture/ furnishings are the most likely to cite proof of purchase as a reason for registering their product (39%).

Figure 30: Top three reasons for registering a product, by product category (wave one figures in brackets)

White goods	Electrical appliances	Baby products*	Sports and leisure items	Furniture/ furnishings
To validate the warranty 81% (82%)	To validate the warranty 68% (70%)	n/a – small base	To validate the warranty 62% (64%)	To validate my warranty 64% (59%)
So the manufacturer can let me know if there are any problems 44% (51%)	So the manufacturer can let me know if there are any problems 35% (40%)	n/a – small base	To get an extended warranty 28% (18%)	For proof of purchase 39% (28%)
For proof of purchase 31% (35%)	For proof of purchase 33% (30%)	n/a – small base	For proof of purchase 28% (47%)	So the manufacturer can let me know if there are any problems 34% (33%)

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

Base: All who registered their eligible product: electrical appliances (W1=379; W2=433), white goods (W1=405; W2=394), furniture/ furnishings (W1=95; W2=67), sports and leisure items (W1=105; W2=54)

*In wave two, only 24 respondents had registered an eligible baby item. This group has not been reported on due to small sample size.

Figures in red are significantly lower in wave two than in wave one

Three quarters of individuals who register their products do so online, whether that is on the manufacturer’s website (43%) or the retailer’s website (30%). One in ten registered their product by phone (9%) and fewer do it via an app (6%). White goods continue to be the most likely product to be registered over the phone (16%). This is all consistent with the findings in wave one. In wave two, there has been a significant increase in the proportion of people who registered a sport and leisure item registering it via a government website (11% vs 3%).

Younger respondents aged 18 to 29 are the most likely to register their product on the government website (4%), on the Trade Association website (4%), or via an app (12%). BAME respondents in wave two are now more likely than those from a White background to have registered a product on the government website (3% vs 1%).

Almost all of those who registered their eligible product found the process easy (93%). However, the proportion of those who said registering furniture/ furnishings was difficult has risen in wave two (7% vs 1%). Those who registered their product via an app are also more likely to say the process was difficult in wave two (10% vs 0%).

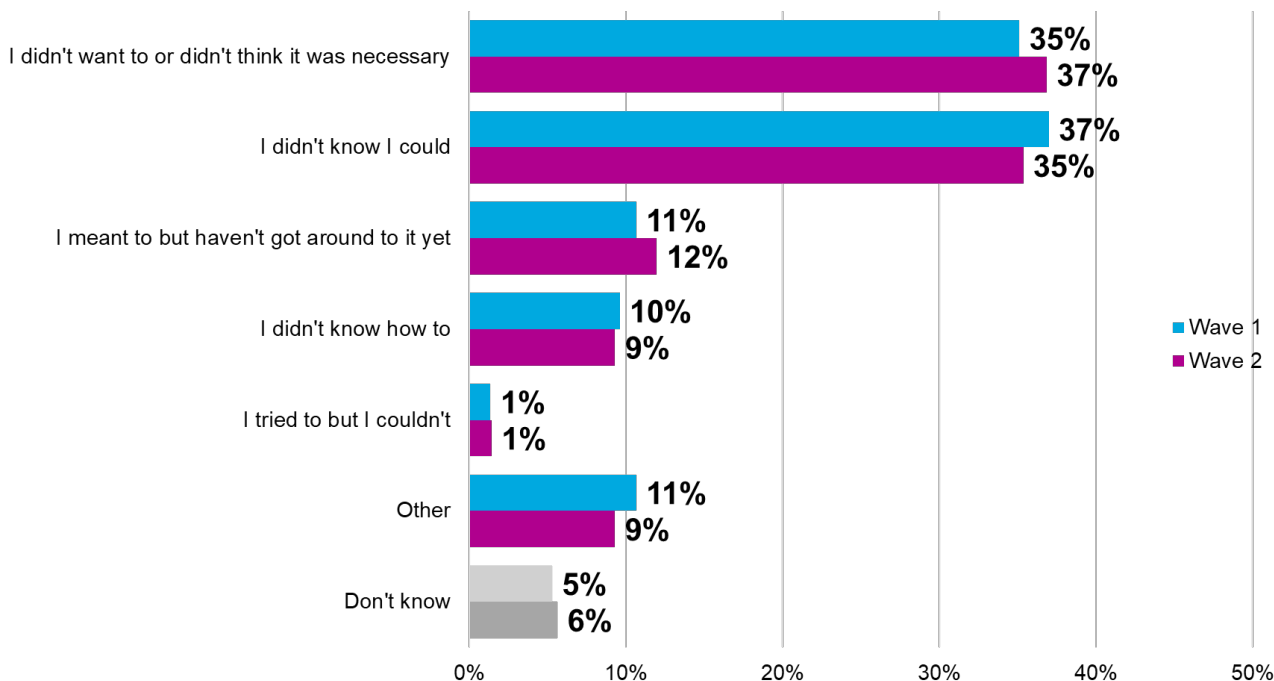
Reasons for not registering products

For individuals who did not register an eligible product, the most common reasons for doing so continue to be not wanting to/ not thinking it necessary (37%) or not knowing that they could (35%). Around one in ten meant to register their product but had not done so yet (12%) or did not know how to register it (9%). These figures are consistent with the findings in wave one.

In wave two, those who purchased furniture/ furnishings are the most likely to say they did not know they could register the item (46%). There has also been an increase in the proportion of people who meant to but have not got around to registering their furniture/ furnishings (5% vs 2%).

Those who purchased white goods continue to be the most likely to say they had not got around to registering it (35%). Only one in eight of those who purchased but did not register white goods said that this was because they did not know they could (12%) and this is a significant decrease compared to wave one (21%).

Figure 31: Reasons for not registering an eligible product

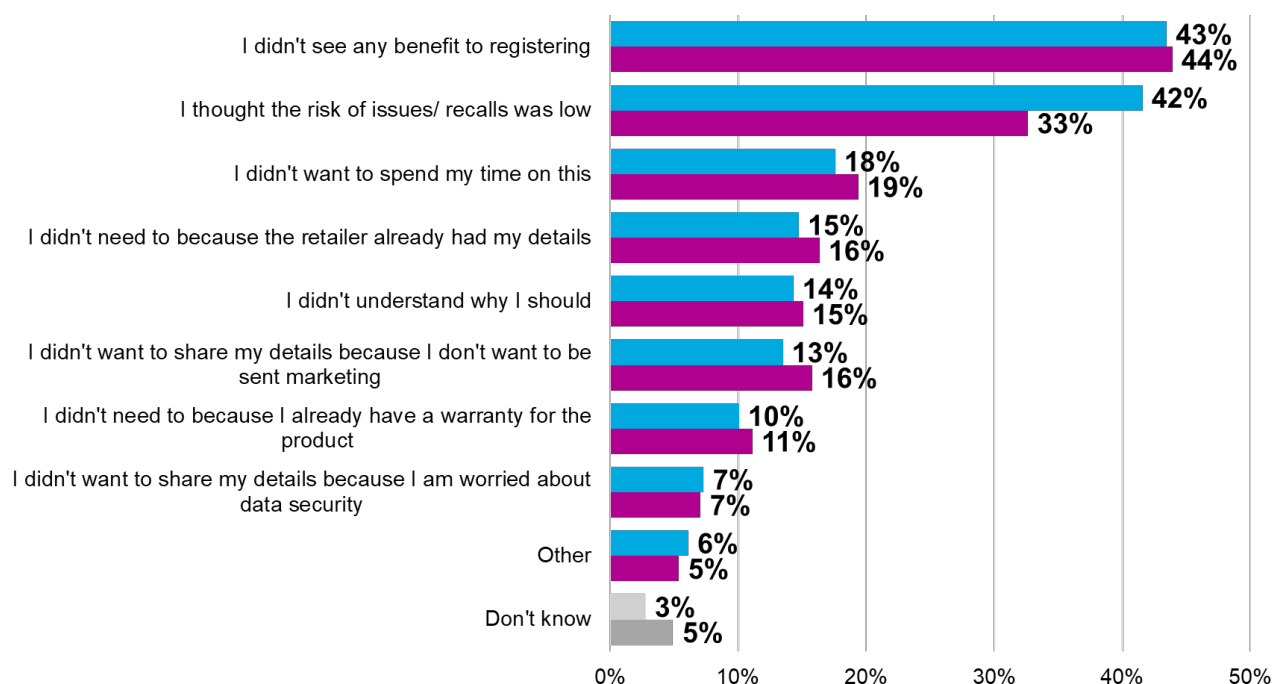


Q: You said you didn't register the [product] when you bought it. Which, if any, of the following are reasons for this?
 Base: All who did not register product (W1=2,093; W2=1,877)

When those who did not want to register their product or did not think it was necessary were asked why they thought this, the top answer is consistent – not seeing any benefit to doing so (44%). However, in wave two, people are more alert to potential safety issues and recalls - there has been a significant fall in the proportion of people saying they believe the risk of issues/ recalls is low (33% vs 42%). There is a particular decline in the proportion of people who bought an electrical appliance (41% vs 29%) or sports and leisure item (34% vs 47%) who cite the low risk of issues/ recalls as a reason they did not want to register their product

When compared to wave one, there has also been an increase in the proportion of people who purchased furniture/ furnishings saying they did not think registering was necessary as the retailer had their details (26% vs 19%). However, the opposite is true for those who purchased white goods – these people are now less likely to say the retailer having their details is a reason to not register their item (8% vs 22%)

Figure 32: 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?

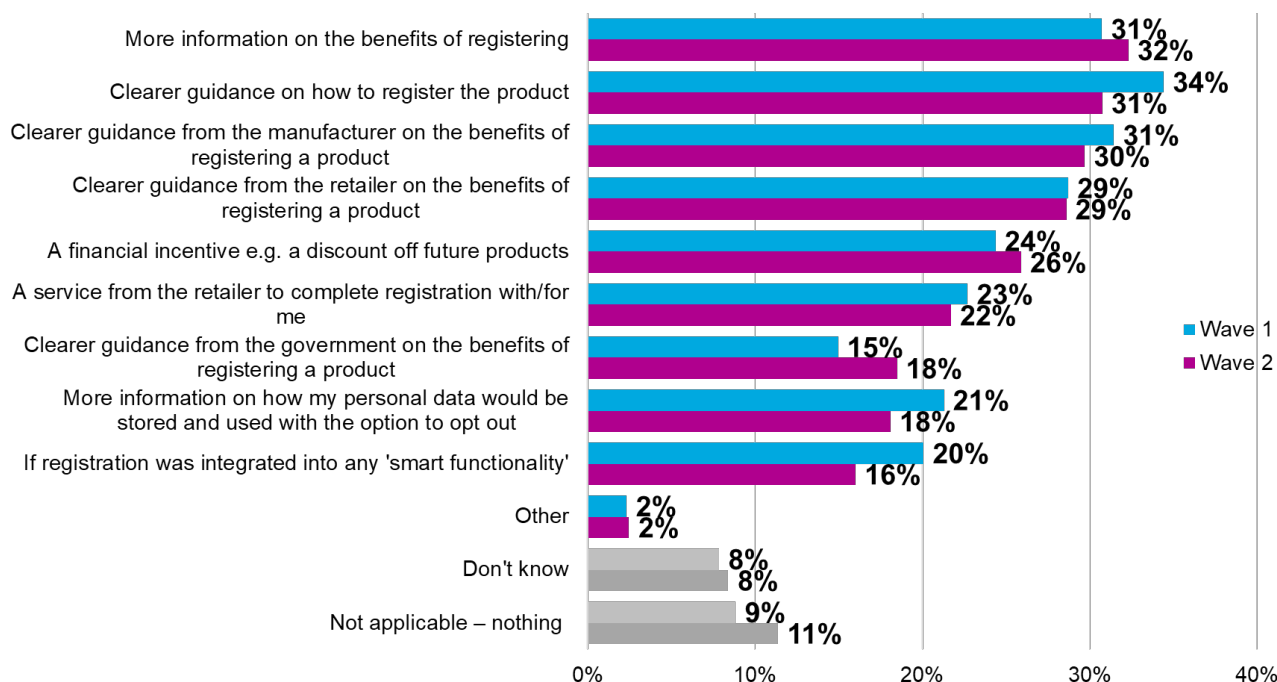
Base: All who did not register product because they did not want to/ didn't think it was necessary (W1=725; W2=679)

The appetite for clearer guidance has slowed somewhat – just over half of those who did not register their product say that clearer guidance would make them more likely to register a product in the future (55%), which is a smaller proportion than those who wanted clearer guidance in wave one (60%). In particular, there is now less appetite for guidance about how to register the product (18% vs 21%), but people are actually now more interested in guidance from the government on the benefits of registering a product (18% vs 15%).

This trend is particularly evident amongst individuals who bought but did not register an electrical appliance – their interest in guidance on how to register a product has fallen compared to wave one (31% vs 36%) while their interest in guidance from the government on the benefits of registering has risen (19% vs 13%). Those who bought baby products are now quite interested in a service from the retailer to complete registration for them (37% vs 24%). However, those who purchased and did not register a sports and leisure item are more likely than wave one to say nothing would encourage them to register a product in the future (14% vs 9%).

Younger respondents are the most likely to support any incentive for future registration of products, including a particular desire for financial incentives (35%), guidance on how to register the product (38%), more information on the benefits (35%), or guidance from the government on what the benefits are (28%). This suggests that advice and guidance is still valuable for those who have had fewer opportunities to register products over a lifetime, even if it is now less necessary for the UK public overall.

Figure 33: What would encourage registration of products in future



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

Registration campaign

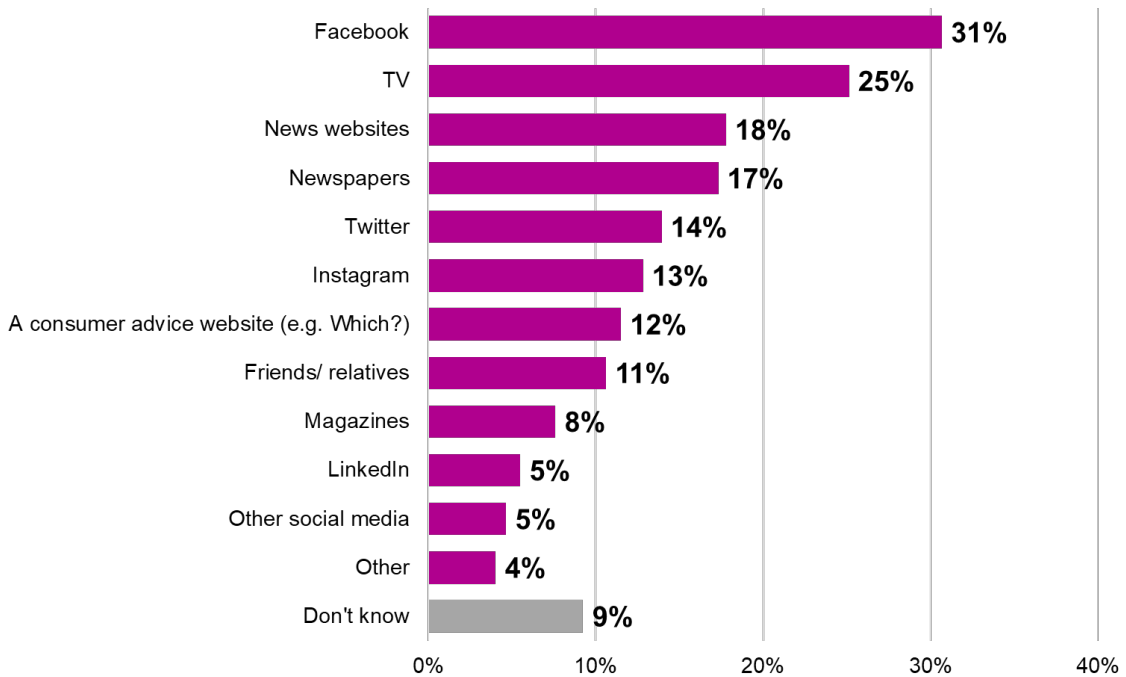
Since April 2021, three percent of the UK public said they had seen adverts about registering products that were in the style shown in the survey (images provided in the technical report). Those who had registered the product they were asked about in the survey were more likely to have noticed the adverts than those who had not registered their product (5% vs 2%).

There is a downward trend by age for having seen the adverts – with those aged 18 to 29 the most likely to have seen the adverts and recall falling for older groups (7% 18 to 29, 3% 30 to 49, 2% 50 to 64, 1% 65+).

- Black, Asian, and minority ethnic (BAME) individuals are more likely to have seen the product registration adverts than those from a white background (8% vs 2%).
- Full time students are particularly likely to have seen the adverts (8%).
- Those with caring responsibilities are more likely than those without to recall seeing the adverts (6% vs 2%)

Of those who recall the adverts, the most common places they saw the adverts are Facebook (31%) or TV (25%). Men are more likely than women to recall seeing the adverts on news websites (24% vs 11%) or falsely recall seeing the adverts on consumer advice website such as Which? (18% vs 3%). The adverts were not shown on consumer advice websites, but the option was included as a source that people may expect to see such information and to evaluate whether or not they attribute recall to these websites anyway.

Figure 34: Source of product registration adverts



Q: You said that you'd seen adverts about registering products recently... Which, if any, of the following places did you see them?

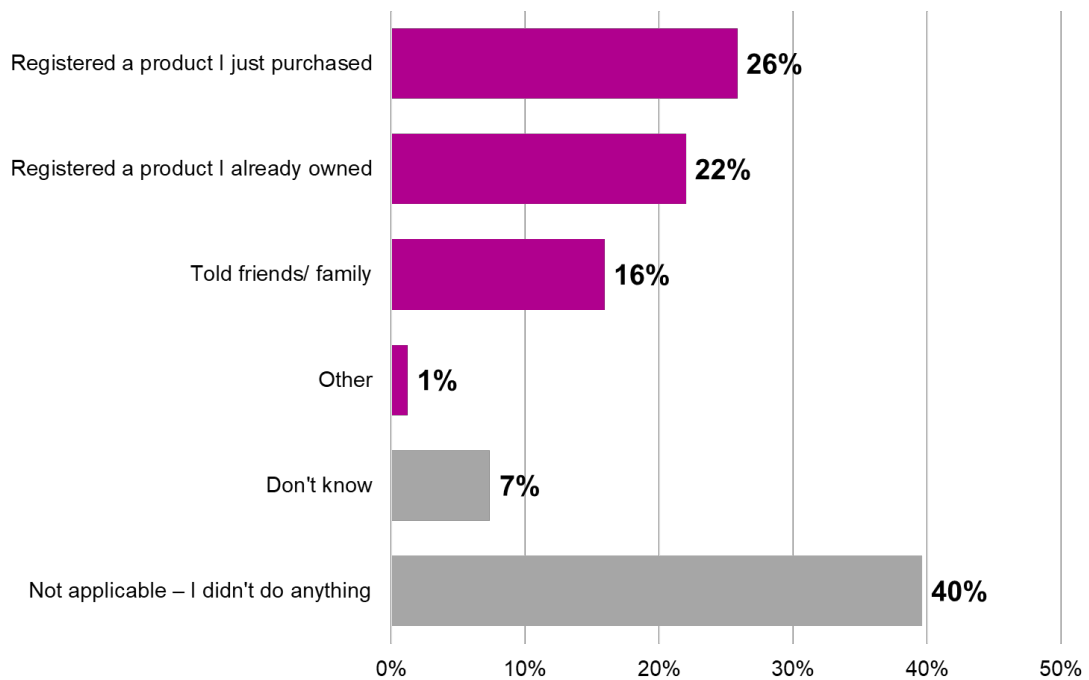
Base: All who recall campaign (n=285)

Among those who recall seeing the product registration advertising campaign, just over half took action as a result (53%). The most common action was to register a product the individual had just purchased (26%) while a fifth registered a product they already owned (22%). One in six told friends or family about the campaign (16%). However, a sizeable proportion did not take any action as a result of seeing the campaign (40%).

People with a disability that limits them in day-to-day life are more likely than those without a disability to have taken action as a result of the campaign (74% vs 37%). Similarly, those with children in the household are more likely to have taken some form of action compared to those without children (67% vs 39%).

BAME respondents are particularly likely to take action as a result of seeing the campaign (76%) and in particular; they are more likely than people from a White background to register a product they just purchased (39% vs 20%) or a product they already own (35% vs 16%) because of the campaign. When asked initially about whether they registered an eligible item that they had purchased in the last six months, there were no significant differences in the likelihood of BAME or White respondents registering their item (35% vs 31%). This suggests the campaign has made a meaningful difference in encouraging BAME individuals to register their products, but has not had the same impact on White respondents.

Figure 35: Actions taken as a result of seeing product registration campaign



Q: You said that you have seen adverts about registering products recently...Which, if any, of the following did you do as a result?

Base: All who recall campaign (n=285)

Those who registered a product as a result of the campaign were asked how they registered it – and the campaign seems to have driven some channels more than others. A fifth of those who saw the campaign said they registered a product via an app as a result (21%). In a similar question, only six percent of people who had bought and registered an eligible item in the last six months had done so via an app.

A fifth of those who saw the campaign said they registered a product on the manufacturer’s website (20%) or by phone (19%). Around one in six registered a product via post (15%) or on the retailer’s website (12%) as a result of the adverts. Only three percent went to the government’s website and one percent visited the AMDEA portal.

Factors that influence product registration

The results presented in this section are the outputs of logistic regression models that aim to predict which demographic or contextual factors are most closely associated with individuals registering an eligible product.

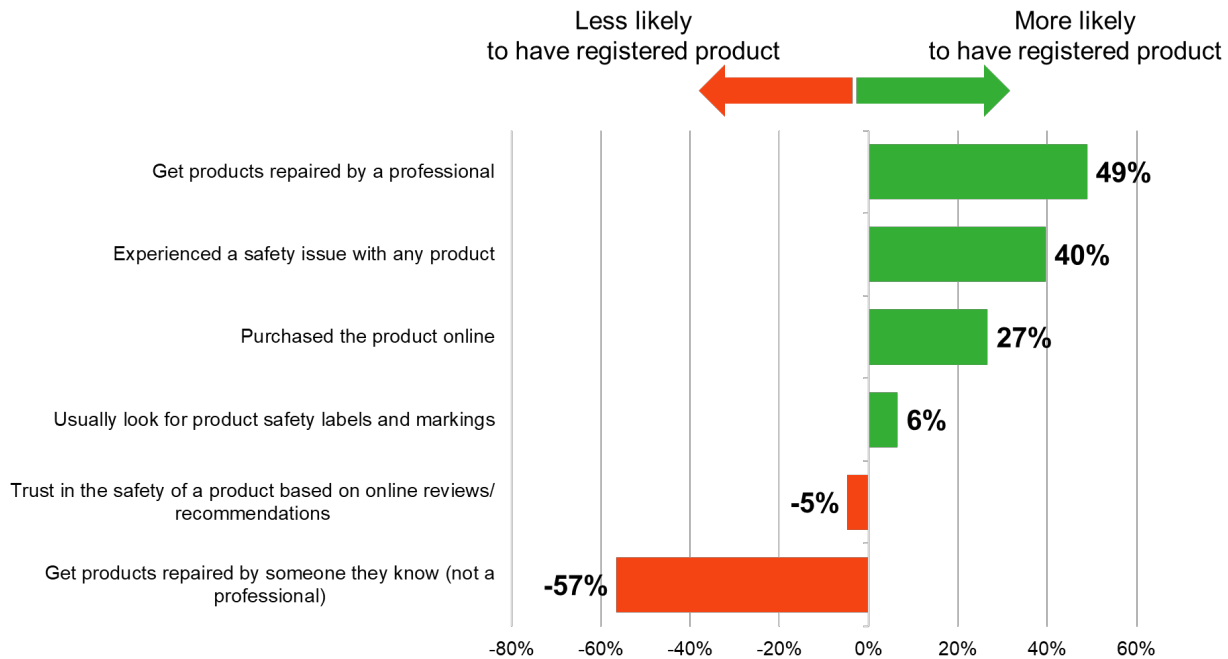
Including this multivariate analysis provides a more robust understanding of behaviour through looking at a number of variables at the same time, which isolates the effect of each factor after taking into account the simultaneous effects of other factors.

The figure below shows the demographics, experiences and perceptions which are most highly associated with registering or not registering an eligible product. The model predicts that an individual’s behaviour regarding a broken item is connected to their behaviour with product registration. Generally, those who say they would get a broken item repaired by a professional are more likely to register their product while those who get products repaired by someone they know are much less likely to register their product.

Additionally, having an experience with any kind of safety issue makes people more likely to register their product. We hypothesise that the reason for this is that a person having previous experience of a safety issue provides respondents with an understanding of the hazards of not registering a product. Similarly, those who purchased their product online or usually look for product safety labels are more likely to register their product.

In support of this hypothesis, the analysis also indicates that experiencing a safety issue minimizes complacency around registration - those who experienced a safety issue are less likely to say they did not register a product because they did not want to/ did not think it was necessary.

Figure 36: Key drivers of product registration



Conclusions

This report is the second wave of an important study, tracking the UK public's perceptions and experiences within the product safety policy area. Wave one was conducted in November 2020 and this second wave, completed in May/ June 2021, tracks public opinion in the context of the COVID-19 pandemic and the loosening of restrictions.

There remains strong agreement that products sold in the UK are generally safe as there are regulations in place to ensure that. Perceptions of safety are often dependent on past experiences with products and a previous experience of buying a product remains the most commonly cited factor that builds trust that a product is safe.

Perceptions of product safety are generally very high and that may explain why product safety ranks relatively low as an important factor when purchasing a product. An interesting trend to monitor into future waves is the finding that compared with wave one the existence of a kitemark/ quality trademark and the warranty/ guarantee offered are now less influential factors in trust that a product is safe.

The COVID-19 pandemic has led to further growth in the amount of online shopping that takes place. This research is an important measure of the attitudes and perceptions of the UK public towards online shopping.

We find that there are very strong levels of agreement from the UK public that the seller is responsible for ensuring a product bought online is safe. Compared with other online channels (such as online retailers of a range of products) there is still greater uncertainty about whether products bought from Amazon marketplace or other online marketplaces are safe.

While most of the UK public feel they are aware of their consumer rights if a product they have bought online is unsafe, this is less likely to be the case for younger consumers. A significant area to address in raising the awareness of consumer rights.

In accessing safety information currently, the majority of the UK public would prefer to access safety information through a physical product / label. Moving towards a digital display of safety information may need wide reaching promotion, as currently under one in ten would use a QR code printed on the product or label, and an even smaller proportion would access information through a screen on the device or in device settings.

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

Levels of product registration vary considerably depending on product type, but overall remain fairly low (at a third of people) and most people who don't register a product feel that it wasn't necessary to do so. There is also decreased appetite for guidance on how to register a product although interest in information around benefits of registration has remained steady. Furthermore, in wave two, there is a marked increase in a desire for guidance from the government specifically.

A product safety system needs to work effectively for all and in particular it is important that Government looks at experiences by characteristics protected under the Public Sector Equality Duty (PSED).

It is interesting to note that people with a disability or health condition that limits their day-to-day life appear more attune to safety issues, being more likely to register their product than those without a disability. And people with a disability are also more likely than those without a disability to agree that they usually look for product safety labels and markings when making a purchase.

Trends also exist in accessing information with younger or BAME respondents most likely to show preference for accessing information through a QR code or via the device screen / settings. However, these are still relatively low proportions and most still prefer physical information on the product or label itself.

This robust and large dataset provides many opportunities to compare and contrast the experiences of different groups in the UK population and is an important addition to the understanding of experiences under the PSED.

Appendix A: Topical spotlight

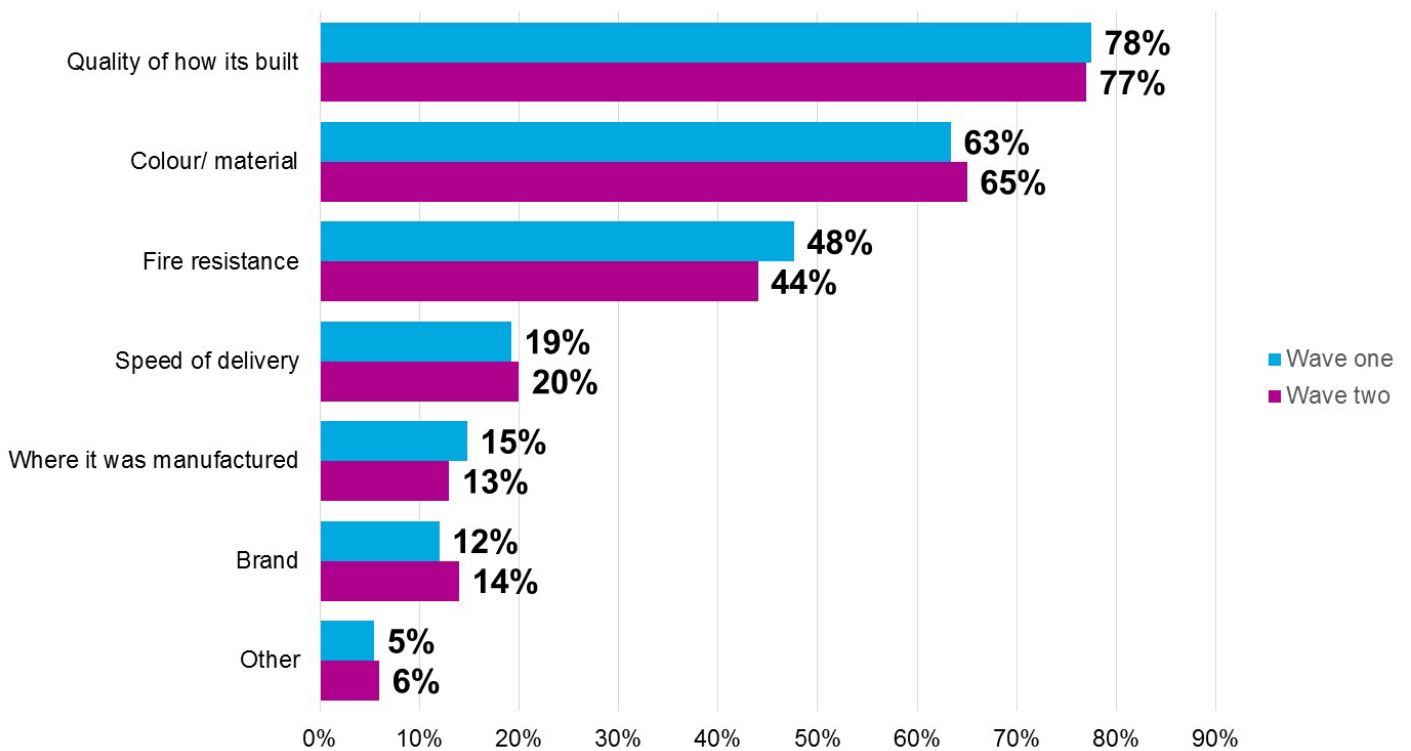
Furniture labelling

When asked to exclude price and size, just over two fifths (44%) of the UK public feel that fire resistance of upholstered furniture is an important purchase consideration. This is a small reduction from the 48% of people that reported this in wave one.

There remains a clear upward trend by age for considering fire resistance importance – only 25% of those aged 18 to 29 think it is important, compared to 64% 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 (77%) and the colour/ material (65%).

Figure 37: Most important factors when purchasing an item of upholstered furniture



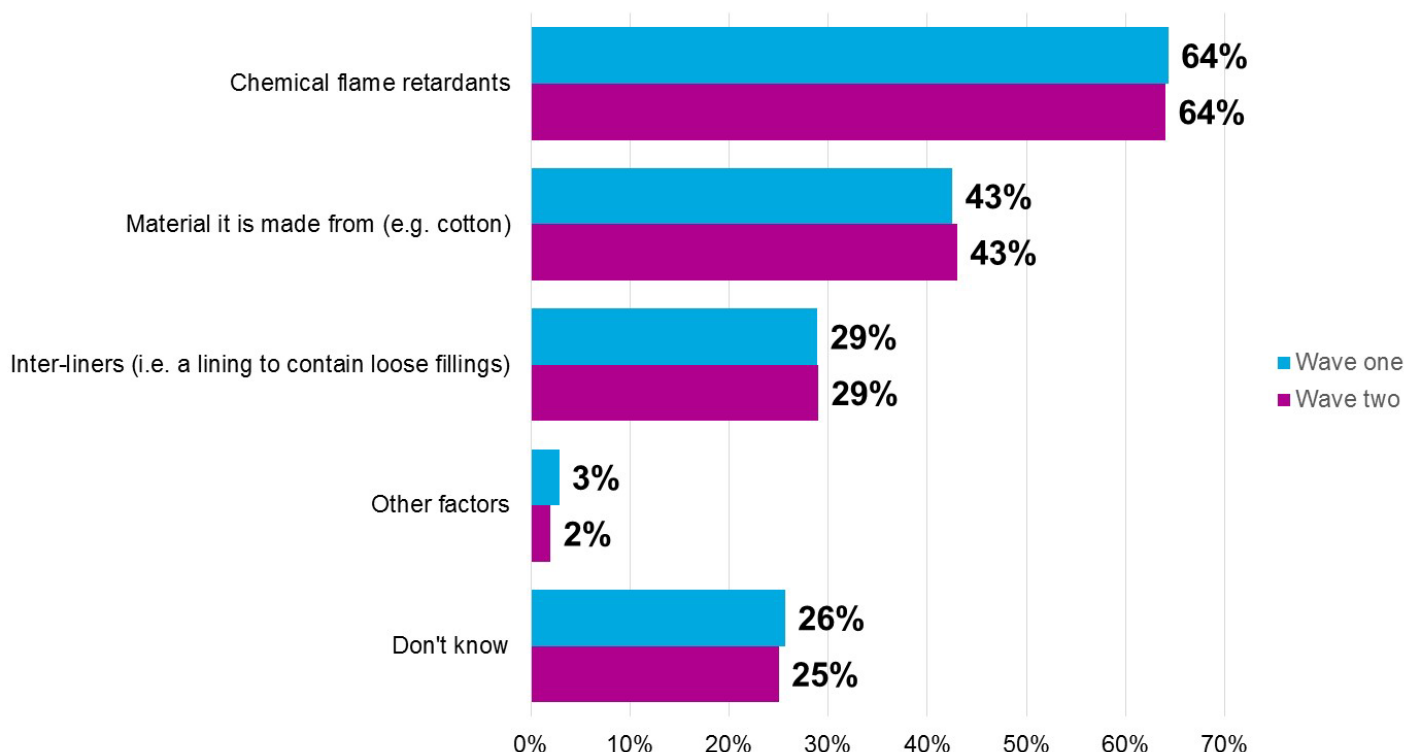
Q: For the following question, please do NOT consider the price or the size of the furniture... Which of the following factors are the most important to you when buying an item of upholstered furniture (e.g. a sofa)? (Please select up to 3 options)

Base: All respondents [in furniture labelling section] (wave one n=3,411, wave two n=4,109)

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 remains the case that a quarter (25%) 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 (34% vs 16%).

Figure 38: 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] (wave one n=3,411, wave two n=4,109)

The UK public's levels of awareness that upholstered furniture usually comes with chemical flame retardants, remains unchanged at 69% (70% in wave one). Awareness varies by demographics:

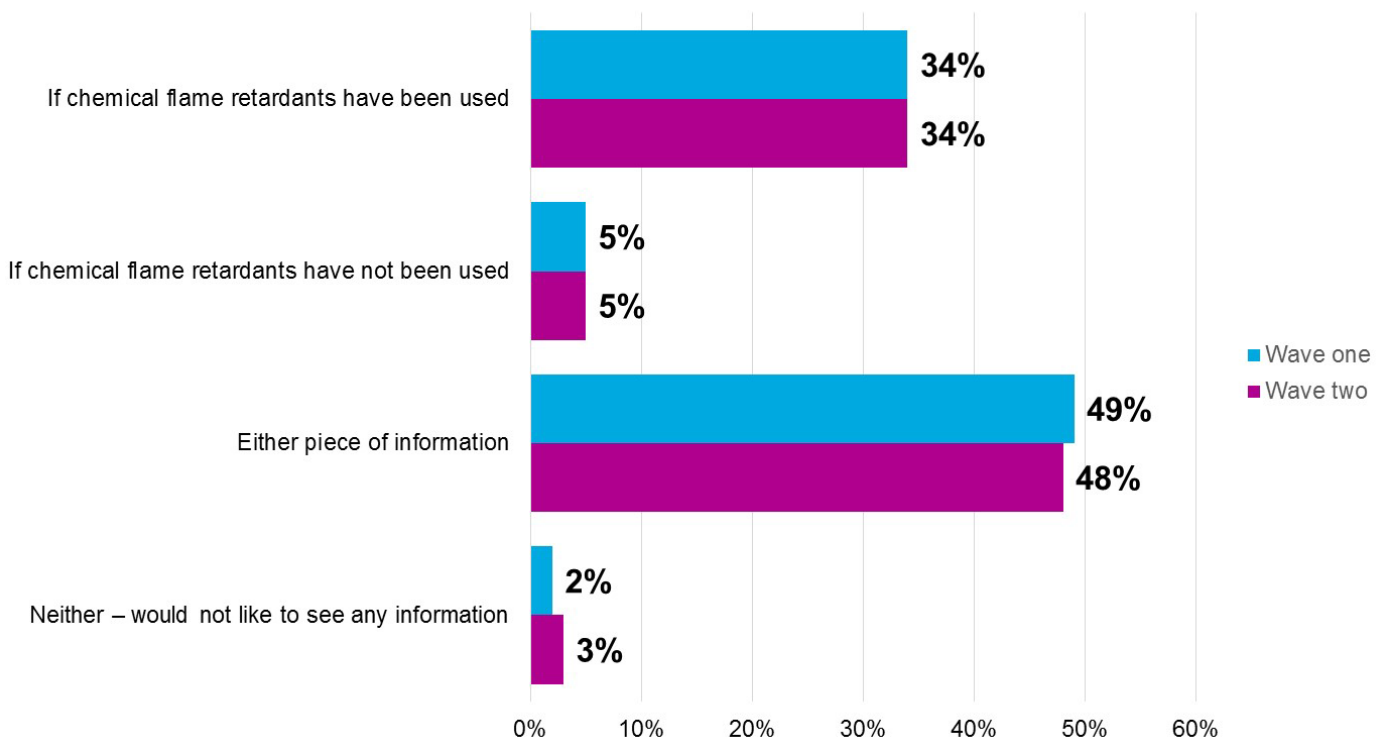
- Younger respondents are least likely to be aware (45% 18 to 29 year olds, compared to 82% of 65+ year olds)
- White respondents are more likely than BAME respondents to be aware that upholstered furniture includes chemical flame retardants (71% vs 58%)
- Those respondents in work are more likely to be aware than full time students (68% vs 43%)

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 (7%), baby products (6%), sofas/ armchairs (10%) or other upholstered furniture (8%).

The UK public remain generally ambivalent regarding what information on chemical flame retardants they would like to see, with half (48%) saying they would like to see either whether chemical flame retardants have or haven't been used. 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 (3%) would not like any information on chemical flame retardants.

Figure 39: 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] (wave one n=3,411, wave two n=4,109)

A similar pattern is seen with general fire resistance information - 44% wanting to know whether a product is fire resistant and only 6% preferring to be informed if the furniture is not fire resistant. Two fifths (40%) 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%).

Magnets

Roughly two-thirds (69%) would be concerned about whether fidget toys with magnetic pieces or construction toys with magnetic pieces (67%) are safe for a child under five to play with. These figures are consistent with 2020 findings. Doll/ action figures (38%) and building blocks (35%) are the least concerning for a young child to play with.

Overall, those who have children are less concerned about safety risks than those without children. Particularly notable is the reported lack of concern - individuals with children in their household are more likely than those without children to say they are unconcerned about the safety issue any listed item presents. Only one in six (16%) of those without children say they are not concerned about fidget toys, compared to a quarter (25%) of those with children in their household. This is likely due to a fall in uncertainty around the safety of toys – one in eight (12%) without children are unsure about the safety of fidget toys while only 6% of those with children are unsure.

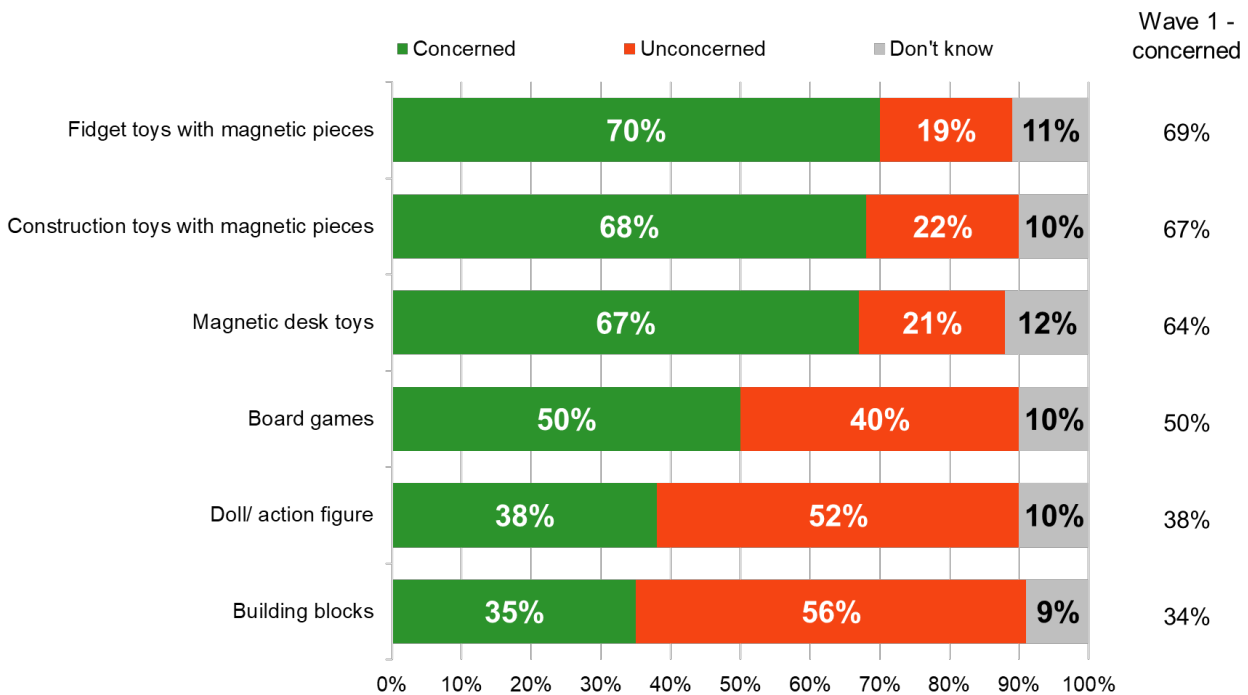
With consideration for the age of parent, those aged 18 to 29 with children in their household are slightly more concerned about the safety of items for a child under five than their counterparts without children – two thirds (66%) of those with children in the household are concerned about fidget toys compared to over half (58%) of those without children. Those aged 65 and over with children in their household are more concerned about all items than those without children, but they are also more likely to state that they are not concerned about some items. As before, the differentiator is uncertainty – around one in ten of those aged 65 and over without children are concerned about each item (13% concerned about fidget toys, 9% concerned about board games), compared to only 3% of those aged 65 and over who have children in the household (consistent across all items). This could indicate that parents get used to their children playing with a variety of different toys and grow to be less concerned of the risks posed.

Additionally, when we look at parents of a young child up to 5 years old, we see a similar pattern; they are less concerned about the safety of items than those without children – just under three in ten (28%) are concerned about building blocks while over a third (36%) of those without children are concerned. This indicates that parents lose the uncertainty around safety when their children are relatively young.

The offline population are broadly less concerned than they were in wave one. Now they are less concerned than the general population about the safety risk from magnets in construction toys (68% vs 59%), fidget toys (70% vs 59%), and magnetic desk toys (52% vs 74%).

There is also a gender divide, with women more likely than men to cite concern over each of the toys with a magnetic element. For example, they are more likely to be concerned about the safety of fidget toys with magnetic pieces (76% vs. 64%) for a child aged under 5 to play with.

Figure 38: 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=4,127)

Overall, eight percent of respondents have purchased a toy that contains magnetic pieces in the past 6 months. This is statistically significantly higher than in 2020 (six percent), though the difference is marginal. More research would be needed to confirm whether this upward trend is continued. This is driven by an increase in the proportion of people with children living in the household purchasing such items, from 12% in 2020 to 18% at present.

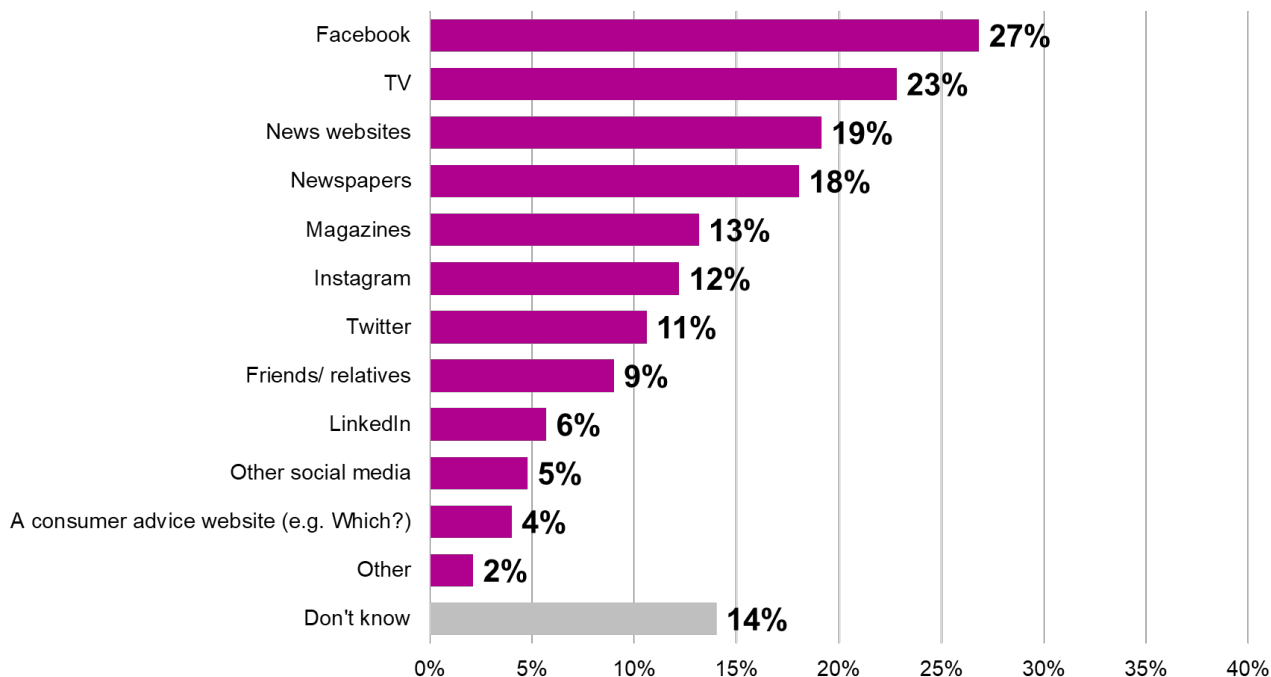
Since March 2021, only three percent said that they had seen adverts about magnet safety that were in the style asked about in the survey. Images of the adverts shown are provided in the technical report. This rose to five percent of Londoners.

Among those saying that they had seen adverts about magnet safety since March 2021, most commonly people saw these on Facebook (27%) or TV (23%). The next most common sources were news websites (19%) and newspapers (18%). Recalling having seen these in newspapers is higher among men than women (24% vs. 11%), though for the most part both groups reported the same top sources.

Younger respondents (aged 18-34) who have a higher social media presence are more likely than those aged 55+ to say that they saw these adverts on Instagram (25% vs. 3%), whilst older respondents are more likely to report seeing them on TV (35% of 55+ vs. 17% of 18-34). Younger respondents are also more likely to report having seen them in magazines (19% vs. 5%), on Twitter (18% vs. 5%) or on LinkedIn (13% vs. 0%). Instagram recall is even higher when looking specifically at 18-24 year olds, rising to three in ten (32%).

Respondents with children in the household are much more likely than those without to say that they saw these on Facebook (37% vs. 21%), which could be a result of targeted advertisements.

Figure 39: Where saw adverts about magnet safety



Q: You said you'd seen adverts about magnet safety recently. Which, if any, of the following places did you see them? (Please select all that apply)

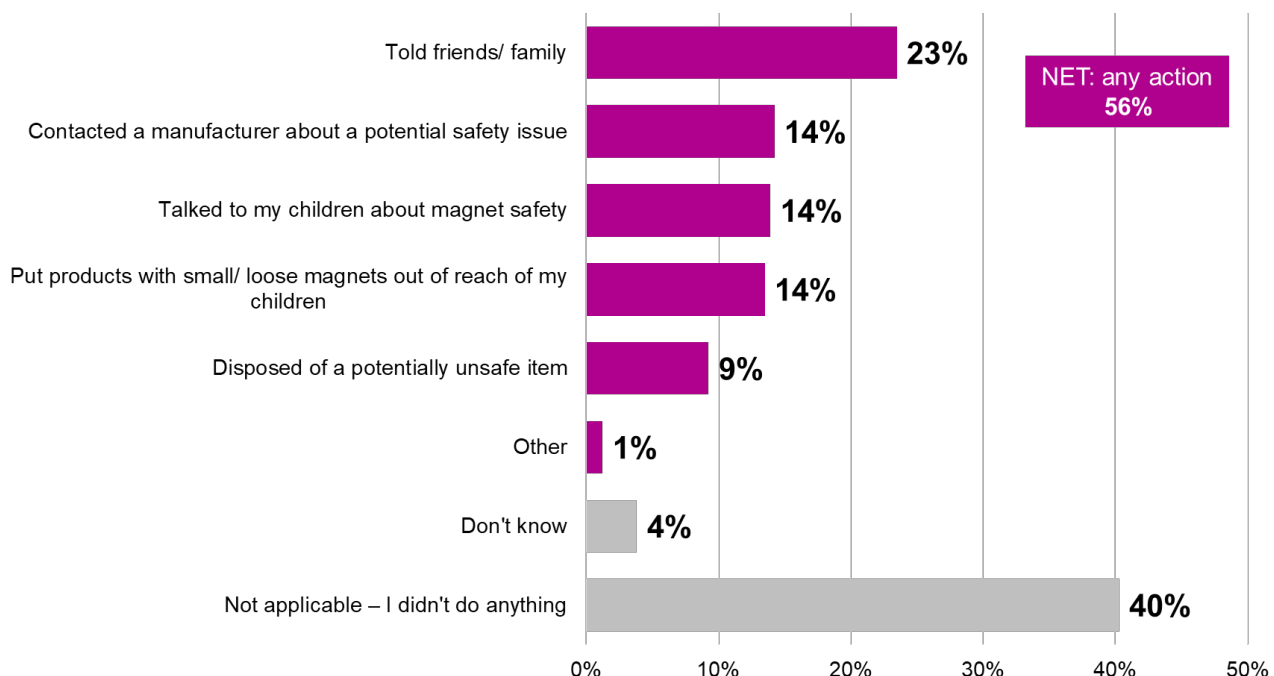
Base: All who saw campaign (n=294)

Among those that had seen adverts about magnet safety since March 2021, over half (56%) took at least one of the actions listed. Most commonly, they told friends/ family (23%). Following this, equal proportions said that they contacted a manufacturer about a potential safety issue, talked to their children about magnet safety or put products with small/ loose magnets out of reach of their children (all 14%). However, a relatively high number (40%) say that they didn't do anything.

As might be expected, respondents with children in the household are much more likely than those without to say that they took one of the actions listed (72% vs. 43%).

Interestingly, the survey suggests that the adverts resonated more strongly with minority ethnic respondents than white respondents. The vast majority (83%) of respondents from BAME backgrounds say that they took at least one of the actions listed after seeing the adverts (vs. 47% of white respondents). There is also a split, though less pronounced, by social grade. ABC1s are more likely to report having taken action than C2DEs (62% vs. 46%).

Figure 40: Actions taken as a result of seeing adverts about magnet safety



Q: You said that you have seen adverts about magnet safety recently...Which, if any, of the following did you do as a result?
(Please select all that apply)

Base: All who saw campaign (n=294)

Circular economy

The circular economy involves reducing, reusing, and recycling resources – which includes sharing, reusing, repairing and recycling items for as long as possible. Second hand items were not explicitly mentioned within the survey, but were discussed during the qualitative focus groups.

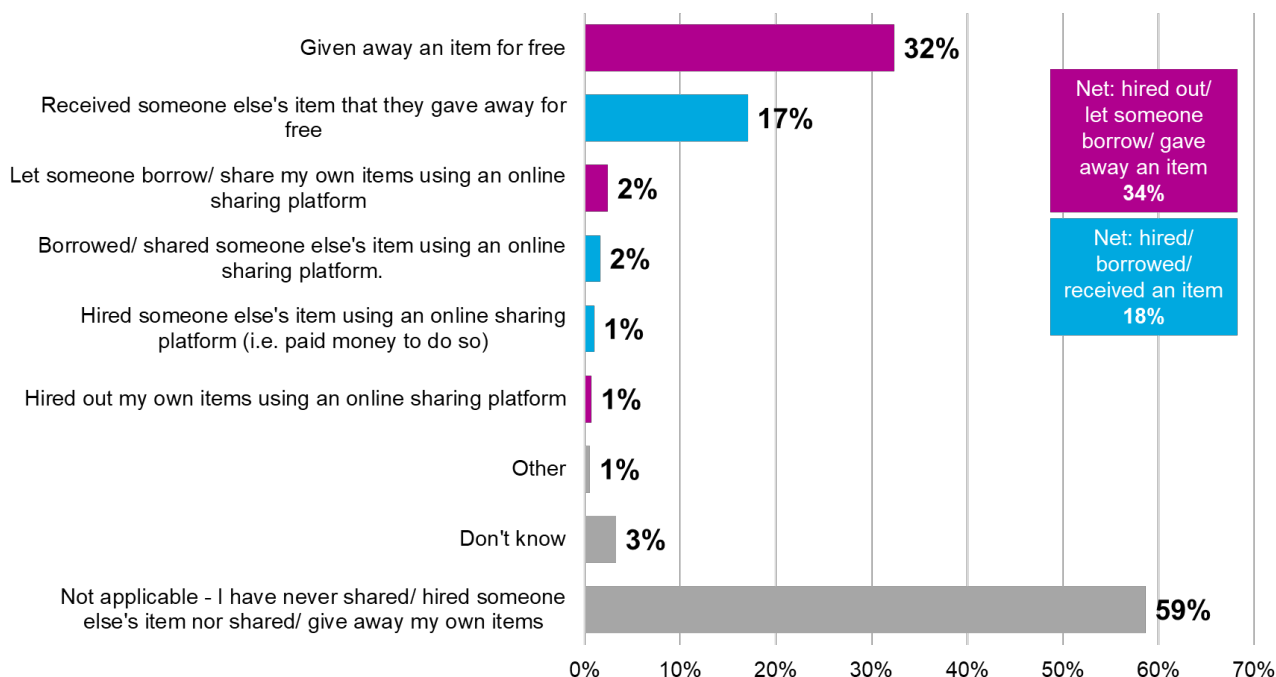
A third of the general public have hired out/ let someone borrow/ or given away an item (34%) but only a fifth have hired/ borrowed/ received an item from someone else (18%). The most common activity is to give away an item for free (32%) or to receive an item that someone else has given away for free (17%). Generally, if someone is participating in the circular economy, they are likely to both give out items and receive them – 81% of those who have hired/ borrowed/ received an item have also hired out/ let someone borrow/ given away an item of their own.

Those aged 30 to 49 are particularly active in the circular economy – they are both the most likely age group to hire out/ let someone borrow/ give something away (37%) as well as the most likely to hire/ borrow/ receive an item from someone else (22%).

Those from the ABC1 social grades are more likely than those from the C2DE social grades to do any circular economy activity (41% vs 34%), but this is due to their increased likelihood to give away items (35% ABC1, 28% C2DE). Those from higher social grades are more likely to feed into the circular economy, but not any more likely to receive items from the circular economy (19% ABC1, 18% C2DE). This is also supported by data from wave one – ABC1 social grades are less likely to consider purchasing items second hand (66%) than those from C2DE social grades (71%). This suggests that that people from ABC1 social grades purchase products as new and then participate in the circular economy by giving them away once they personally have no use for them.

The offline population is less likely than the general population to participate in the circular economy in any way (27% vs 38%), but particularly less likely to have hired/ borrowed/ received someone else’s item (3% vs 18%).

Figure 41: Activities ever done in the circular economy

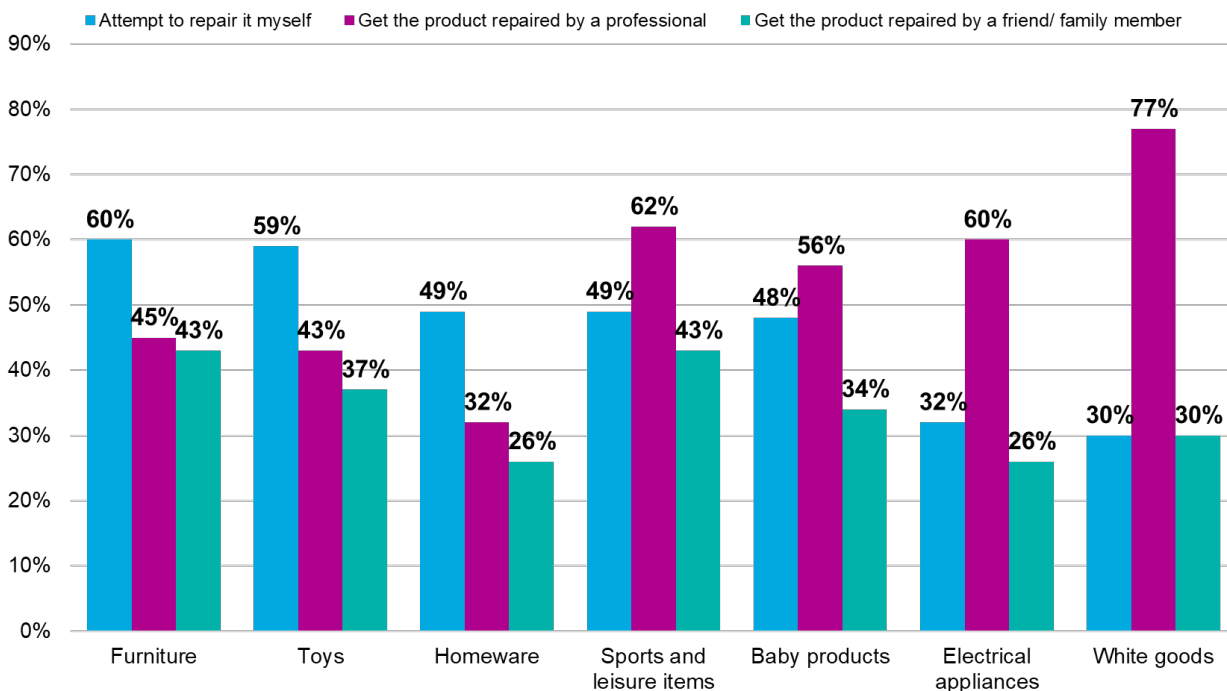


Q: For the following question, please think about the sharing and hire of other people's items (excluding food and vehicles). This can include community/ social enterprise tool or product libraries as well as online community groups (e.g. WhatsApp, Facebook), but excludes for-profit/ professional equipment hire. Which, if any, of the following types of sharing/ hiring items have you ever done?
 Base: All in circular economy section (4,125)

Respondents were then asked specifically about what they would do if a specific product broke so that it was no longer operating correctly. Three fifths of those who were asked to think about furniture (60%) or toys (59%) said they would attempt to repair the item themselves. Around half said they would attempt this for a homewares item (49%). When it came to electrical appliances or white goods, the most common reaction by a clear majority is to get the item repaired by a professional.

There is mixed opinion around fixing sports/ leisure items or baby products and this comes down to the specific item respondents were asked to think about. Generally, half of those thinking about sports/ leisure items said they would fix the item themselves (49%) – but this is highest for those thinking about bikes and accessories (62%) while those with a broken musical instrument would go to a professional (80%). For baby products, those thinking about a broken changing table are mostly likely to attempt a repair themselves (67%).

Figure 42: Proportion likely to take each action if a given item was no longer operating correctly



Q: For the following question, please imagine you owned a [product] which had broken and was no longer operating correctly. How likely, if at all are you to do each of the following things?

Base: All in circular economy section: electrical appliances (n=522), baby products (n=767), toys (n=650), white goods (n=571), furniture (n=758), homeware, non-electrical (n=181), sports and leisure items not including clothes (n=676)

When thinking generally about deciding to get a broken product repaired or buy a new one, the most common element to consider is price (71%), although two-fifths do consider the convenience (44%), safety (43%) or reliability (40%). Three in ten consider the sentimental value of the item (31%) and a quarter thought about the environmental impact (25%).

There is an upward trend by age for considering the safety when deciding to repair or purchase a new product – half of those aged 65 and over consider this (52%) compared to a third of those aged 18 to 29 (35%). Younger respondents are more concerned with the convenience and there is a downward trend by age for this aspect (51% 18 to 29, 39% 65+).

Participants from the qualitative research were often motivated either by the sustainable aspect of second hand shopping alongside the reasonable pricing and the idea that they are supporting charitable causes. Those living on a budget were also attracted to second hand shopping.

Certain items were more likely to be bought second hand than others; books, CDs and clothing are felt to be most appropriate to buy in store and online. However electrical items are considered to be less trustworthy for the majority of participants due to the lack of warranty protection, as well as generally wear and tear from previous owner.

“I have bought clothing pretty much only second hand for 2 years for the environmental benefits” (18-35 year old)

“I prefer buying things new. I have no idea what the previous owner was like and I don't have any of the protections typically offered with new products” (18-35 year old)

“I don't think I've ever bought anything electrical second hand. I don't think I would... Greater risk of it being misused or tampered with, making it dangerous” (18-35 year old)

The majority prefer to purchase items in store to inspect the item in depth, both visually and physically. However, some participants regularly visit sites such as eBay, Depop, Gumtree and Shpock to buy and sell items.

A minority of participants have rented or leased products, though some would be interested in doing this for more expensive items through an established provider, as this would ensure proper cleaning was conducted.

Participants would consider fixing products depending on the original price of the item, along with when its warranty expired and how complex the item would be to fix. Whether the consumer fixes it or a professional does, participants believed that whoever fixes the product would be liable if there was a safety issue at any point in the future.

“It depends on the item, if it's a large item I'd probably try repair it but if it's cheap enough to replace then I'd do that” (35-60 years old)

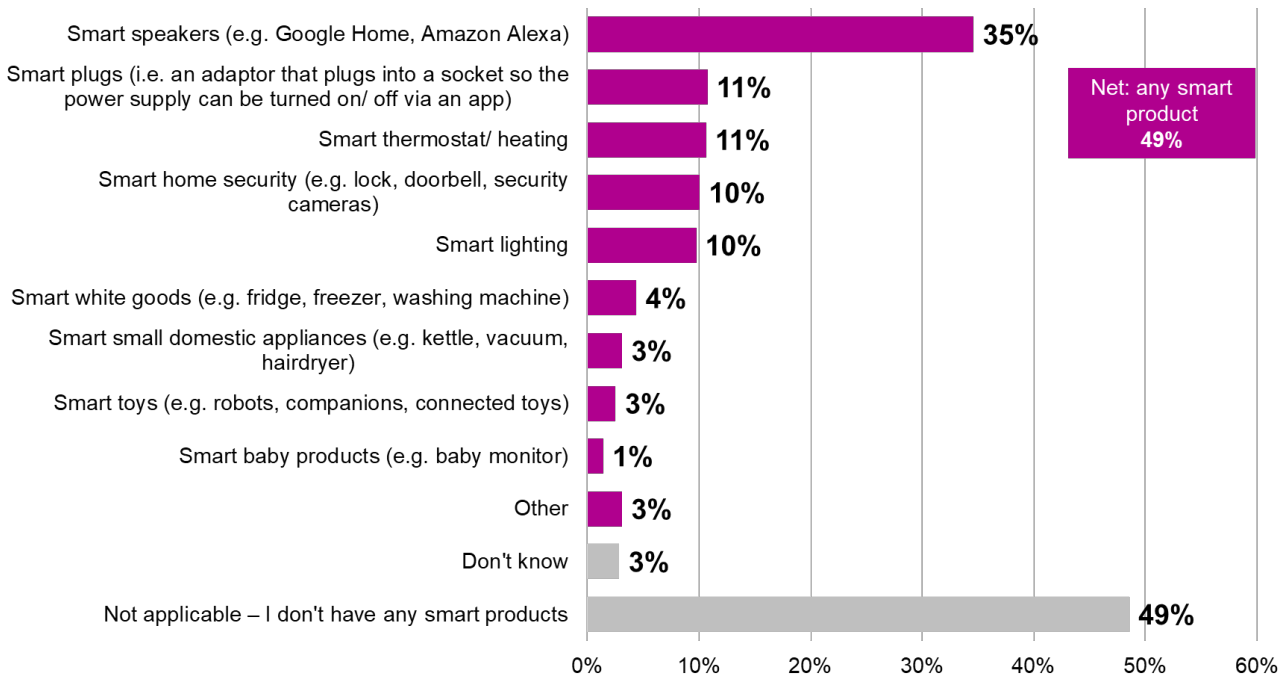
“Depends on if it is still within a warranty period, depends on if it is within my skill set and it depends on how much a replacement will cost” (61+)

Smart products

Of those who purchased electricals in the past six months, around one in ten (12%) purchased a smart product. A fifth of those who purchased a white good in the last six months said their white good was smart (19%). Overall, around half (49%) of the UK public own or have access to smart products in their home, with the most common being a smart speaker such as Google Home or Amazon Alexa (35%). Around one in ten have smart heating (11%), smart plugs (11%), smart lighting (10%) or smart home security (10%).

Those in social grade C2DE are less likely to have access to smart products in their home (41%). Those who own their home are more likely to have smart products than renters (51% vs 45%). Those with children in the household are also more likely to have any smart products than those without children (62% vs 44%).

Figure 43: Which smart products adults own or have access to.



Q: For the following question, by "smart" we mean that the product(s) can be connected to the internet and are controlled via an app. Which, if any, of the following smart products do you own or have access to in your household? (Please select all that apply)
 Base: All in smart product section (n=4,118)

Participants in the qualitative research were familiar with smart products and owned products such as smart speakers, smart doorbells, smart lights, and smart thermostats; when asked about the key benefits participants commented that convenience is the main driver. Smart products are particularly beneficial to those with mobility or visual issues.

“I've got my living room lighting connected to smart plugs along with a few other gadgets including a camera system to keep an eye on my pets” (y 18-35 year old)

“Hive is really convenient for in the winter, for example, turning the heating on before I get home from work” (18-35 year old)

“I'm all for tech making life easier and more convenient. Though I do regularly request my data from Amazon for my Echo and then get them to delete it” (35-60 years old)

However, a number of participants were concerned about privacy with certain products, specifically products like smart speakers; users commented that they were concerned about being hacked - 'listened to' or cameras being switched on remotely. Some also commented that the ability to switch products on and off remotely was a cause for concern, due to the lack of perceived control as well as tracking and surveillance.

“I personally have avoided all other smart devices because I know how easy it is for them to be hacked and overwritten and this concerns me” (61+)

“I think people don't like things like this [Samsung recall example] happening without their consent and it makes them feel like they don't have control” (18-35 year old)

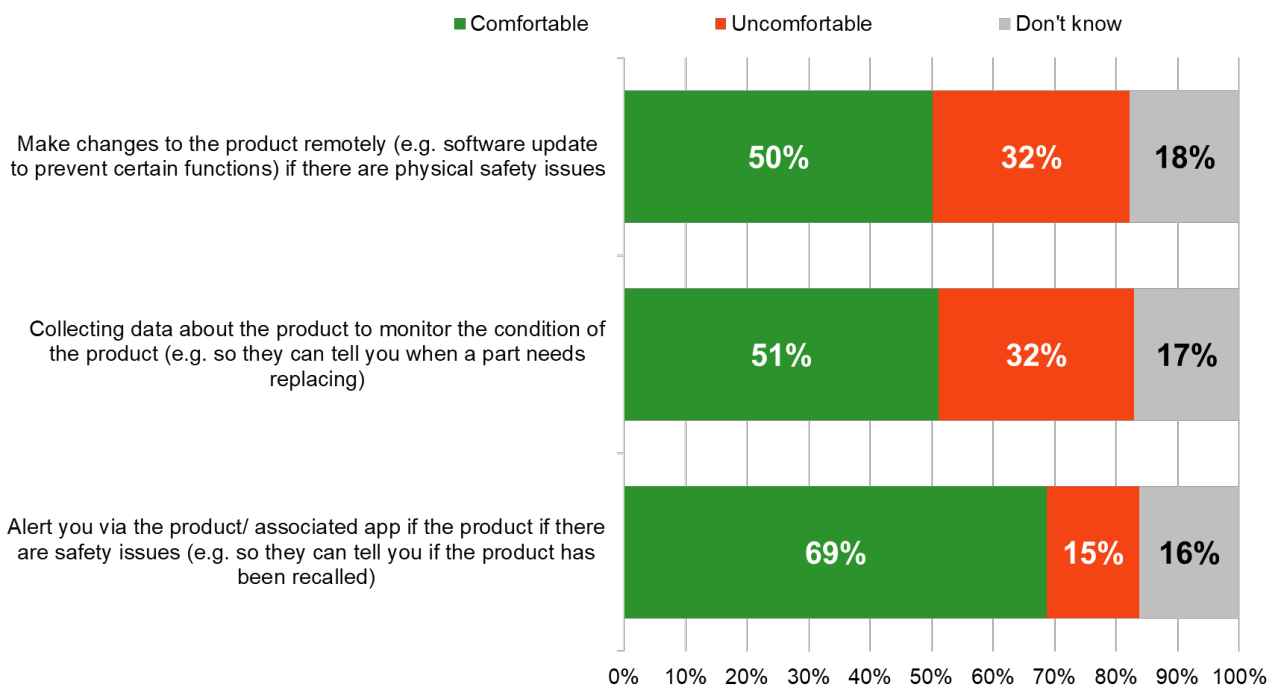
About half (51%) of respondents in the smart product section are comfortable with the manufacturers of their smart white goods collecting data about the product to monitor the condition of the product. Just under a third (32%) stated they were uncomfortable with this. Those who own/ have access to a smart product were generally more comfortable with all scenarios than those without a smart product. Over two-fifths were comfortable with the manufacturers collecting data via a smart white good to monitor the condition of the product (62% of those with access to any smart good, rising to 72% with a smart white good).

Respondents aged 65 and over were the most data-averse, with 46% of this group feeling comfortable with this compared to 52% of those aged 18 to 29. This remains true even amongst those who own smart goods – older respondents who own smart goods are less likely to be comfortable with data collection than younger respondents (59% 65+, 64% 18 to 29).

Similarly, half (50%) of all respondents were happy for the manufacturer of their owned smart product to make changes to the product remotely (e.g. software update to prevent certain functions) if there are physical safety issues. Those who were 65+ were less likely to feel comfortable with this intervention (41%), with those aged 30-49 being most positive (58%). Again, this age trend remains consistent when controlling for ownership for smart products – only 55% of those aged 65+ were comfortable with remote changes, compared to 69% of those aged 30 to 49.

Over two thirds (69%) of respondents were happy to be alerted of any safety concerns (e.g. a product recall) via the product or associated app. Unlike those discussed above, older respondents were much less likely to agree with this alert (66%), but those aged 30-49 remained the most likely to approve (72%). When controlling for smart product ownership, there are no significant differences across age – over three quarters of smart product owners are in favour of alerts via the product in the event of safety issues (78%).

Figure 44: Comfort with technological interventions.



Q: How comfortable, if at all, do you feel about the manufacturer of your smart white good doing each of the following?
 Base: All in smart product section (n=4,118)

Three quarters (75%) of respondents would be likely to act if a product they owned alerted them via the product or associated app of issues with the product. Only 9% were unlikely to act – although this increased to 14% of those aged 18 to 29. BAME respondents are also more unlikely than white respondents to act as a result of a product alert (14% vs 9%).

When these activities were discussed in the qualitative groups, the ability for companies to make adjustments to smart products without consumer consent was not felt to be appropriate. Consumers want the ability to opt-in or out of this feature – this would ensure that companies do not take advantage of this process. This feature would be more acceptable for product recall issues as this would make consumers more likely to take action and return products. Currently recalls are not felt to be advertised clearly or urgently enough to be acted upon. Emails or posters in shops could be missed, therefore communicating with consumers directly or on a range of platforms e.g. on social media is perceived to be more effective.

“I think a product recall on a device is a good idea as we may not always see general product recalls/ miss an email if they are communicated in this way whereas on the actual product this is instant” (35-60 years old)

“The recall thing is a good idea, I don't feel recalls are communicated well enough at all” (18-35 year old)

“I personally would not feel confident... as redundancy is built into so many products these days, I am not sure that I would trust a corporation to have my best interest at heart” (61+)

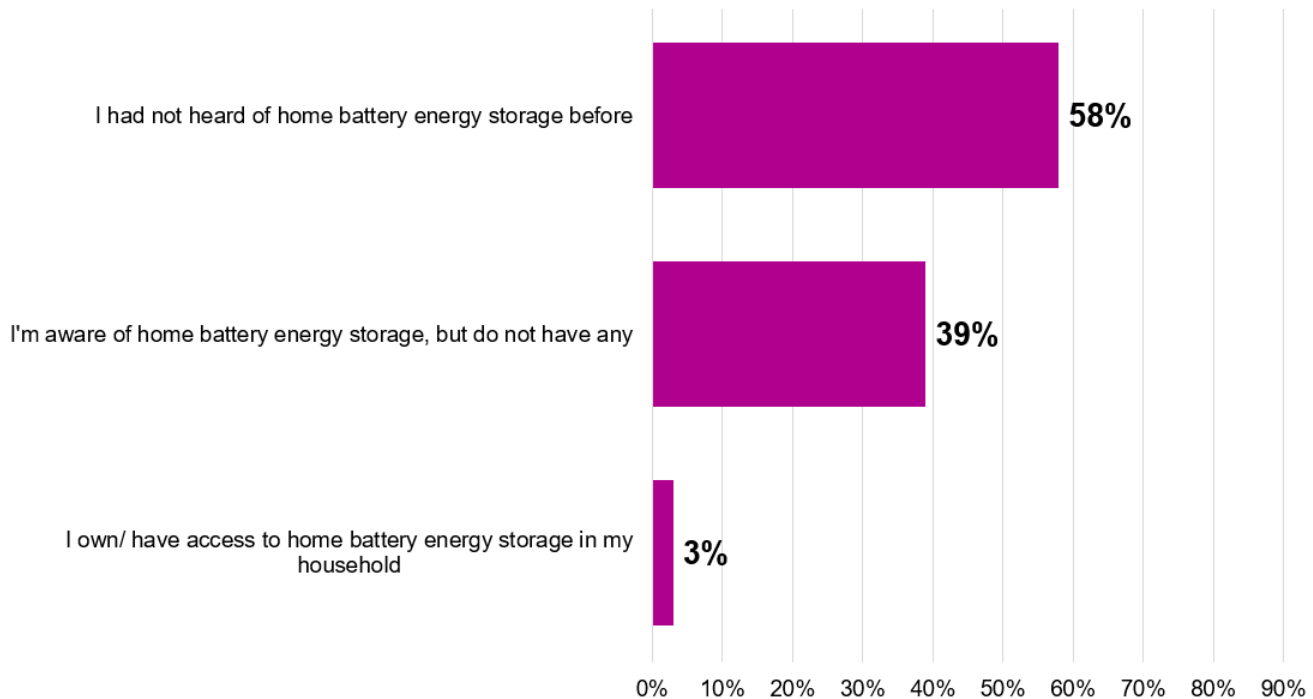
Of those who own smart products, 4% say they consider the physical safety less when purchasing a smart versus a non-smart product. Over half (55%) say they give safety of smart and non-smart products the same level of consideration. A quarter of smart product owners (26%) report they consider safety more when purchasing a smart versus a non-smart product. BAME respondents (40%) and those with children in their household (32%) are both particularly likely to have considered the physical safe use of a smart product more so than a non-smart product – the latter possibly due to considerations around child safety.

Home battery energy storage

Overall, over half of all respondents (58%) had not heard of home battery storage before taking part in this survey. Four in 10 respondents (39%) are aware of home battery energy storage but do not have any, and 3% of respondents own/ have access to home battery energy storage in their home. This is consistent with the offline audience.

Male respondents are much more aware of home battery energy storage than female respondents (49% vs 29%). Younger respondents (aged 18-29) are more likely to not have heard of home battery energy storage (63%) than any other age group, while older respondents (aged 65+) are the largest group that are aware of home battery energy storage (42%). Respondents that are currently renting for their house tenure are much less likely to be aware of home battery storage than homeowners (32% vs 44%)

Figure 45: Awareness of home battery energy storage



Q: For the following question, by "home battery energy storage" we mean facilities that use batteries to store energy for use at a later time. This allows users to buy and sell electricity at times that are financially beneficial. They can be connected to solar panels which generate energy during the daytime to be stored for use in the evening/ at night. Which, if any, of the following statements best applies to you?

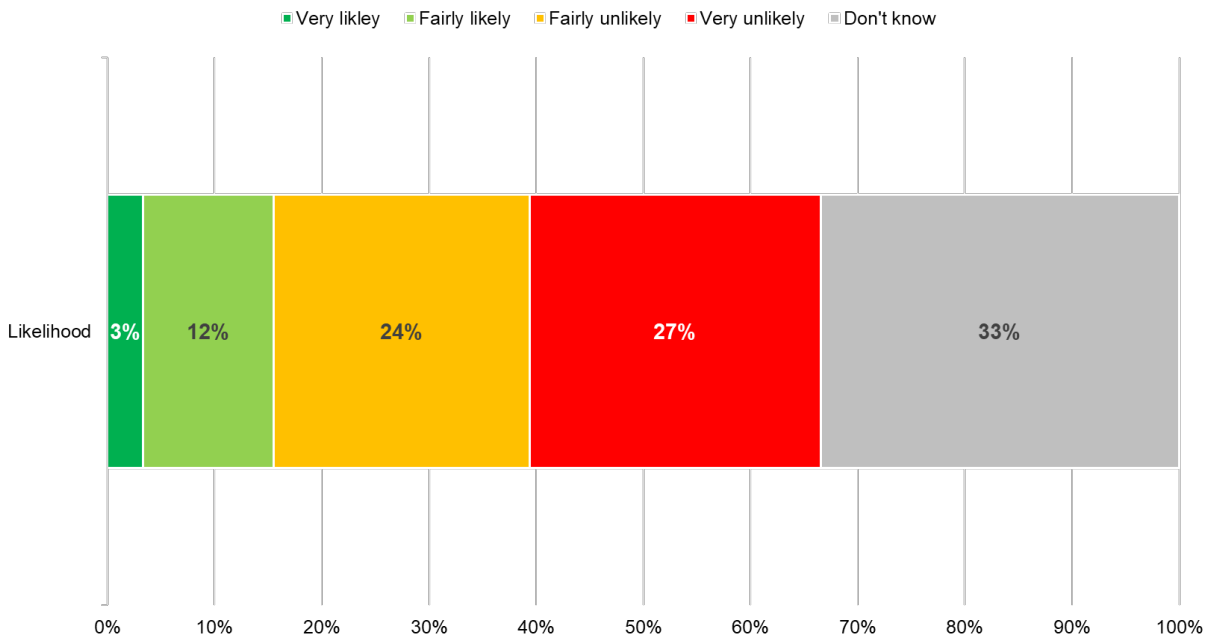
Base: All in home battery energy storage section (n=4,113)

Half of those who do not currently have home battery energy storage (51%) are unlikely to consider getting home battery energy storage in the next 5 years, rising to nearly three fifths (58%) of those who had heard of home battery energy storage before taking the survey. Almost half of those who had not heard of the concept before said they were unlikely to get home battery energy storage in the next five years (47%) and a similar proportion were unsure (43%)

One in six say they are likely to get home battery energy storage (15%), but a third are simply unsure (33%) – suggesting there’s a lack of information and understanding amongst the general public. Those who own their own home are more likely than renters to say they are likely to get home battery energy storage in the next five years (16% vs 13%), but similar proportions of both groups say that it is unlikely (54% owners, 52% renters).

Older respondents aged 65 and over are the largest group saying they are unlikely to get home battery energy storage (63%) while respondents aged 30-49 (18%) are the most likely to do so. BAME respondents are much more likely than their white counterparts to consider getting home battery energy storage (28% vs 14%). Respondents who have at least one child in the household are more likely to get home battery energy storage in the next five years than respondents with no children in the household (21% vs 14%).

Figure 46: Likelihood of getting home battery energy storage in the next 5 years



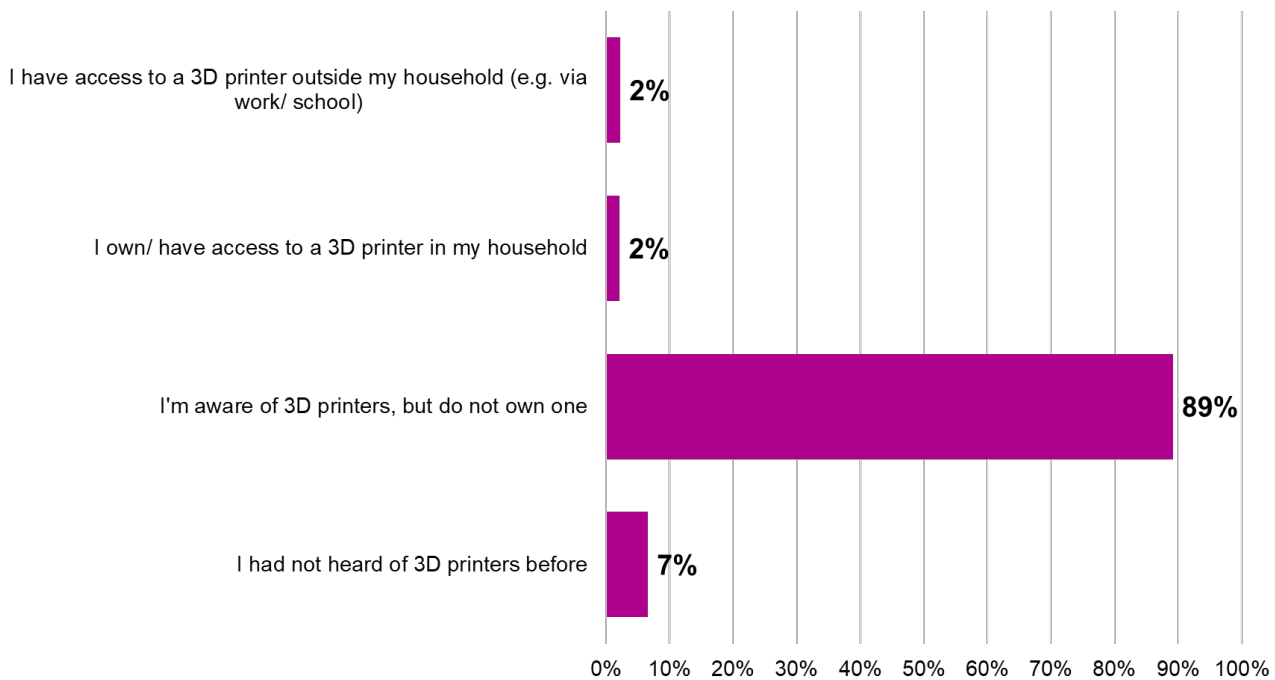
Q: You said you don't have home battery energy storage...How likely are you to consider getting home battery energy storage in the next 5 years (i.e. by 2026)
 Base: All who don't have home battery energy storage (n=3,997)

3D printers

Awareness of 3D printers is very high, with nine in ten saying they have heard of 3D printers (93%). However, only 4% have access to a 3D printer - 2% have one in their home, and the same proportion (2%) have access to one through school or work.

Younger respondents aged 18 to 29 are the most likely to have access to a 3D printer via school/ work (6%), while those aged 65 and over are the most likely to say they have not heard of 3D printers before (8%). BAME respondents are also more likely than those with a White background to say they have access to a 3D printer via school/ work (5% vs 2%). Those with a high education level are also more likely than those with low education levels to say they have access to a 3D printer through school or work (4% vs 1%).

Figure 47: 3D printers' awareness and access



Q: Which, if any, of the following statements best applies to you?
 Base: All in 3d printers' section (n=4113)

The offline population is much more likely than the general population to say they had not heard of 3D printers before taking the survey (48% vs 7%). Half (50%) had heard of 3D printers but do not own or have access to one.

The majority of those who do not own a printer also do not intend to get one in the next five years, with 82% saying they are unlikely to do so. However, men are almost twice as likely to say they will get a printer in the next five years (10%), in comparison with women (5%).

There is a downward trend by age for likelihood to buy a 3D printer - younger respondents aged 18 to 29 said they were more likely to get a 3D printer in the next five years (10%), compared to only 4% of those aged 65 and over.

As with awareness and ownership, the majority of UK adults have not used a 3D printer or bought something printed by a 3D printer (95%). Again, men are using, designing for, or purchasing something printed by a 3D printer at more than twice the rate as women (7% vs 3%). This evidences a gap in awareness and use across men and women, despite there being minimal difference in the education levels and social grades between the genders.

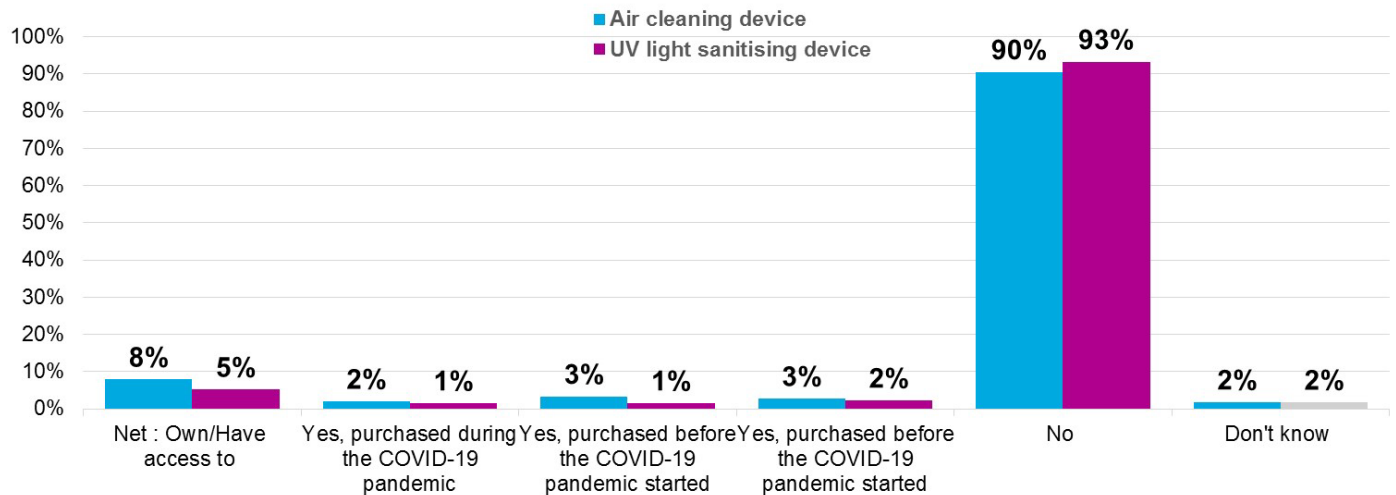
Those who have higher gross household income are significantly more likely to have used a 3D printer or have purchased a product printed by a 3D printer. Almost one in 10 of respondents with a gross household income of £70,000 or over have used a 3D printer or bought a product printed by one. This steadily tracks down as household income reduces.

UVC light devices and air cleaning devices

A small minority of the UK public own or have access to an air cleaning device (8%) or a UV light sanitising device (5%). Younger consumers aged between 18 and 29 are more likely to have access to these devices, with 13% reporting they have access to an air cleaning device and 11% access to a UV light sanitising device.

Respondents from London (12%) were also more likely than people from other parts of the UK to report they have access to an air cleaning device. Also, respondents with a very high household income (£150,000+) are more likely to have access to an air cleaning device, with 14% reporting they have access.

Figure 48: Purchases of air cleaning and UV light sanitising devices



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

Ownership of air cleaning devices in the offline population is broadly similar to the general public – 10% own/ have access to an air cleaning device. Ownership of UV light sanitising devices is markedly higher – 12% own or have access to a UV light cleaning device.

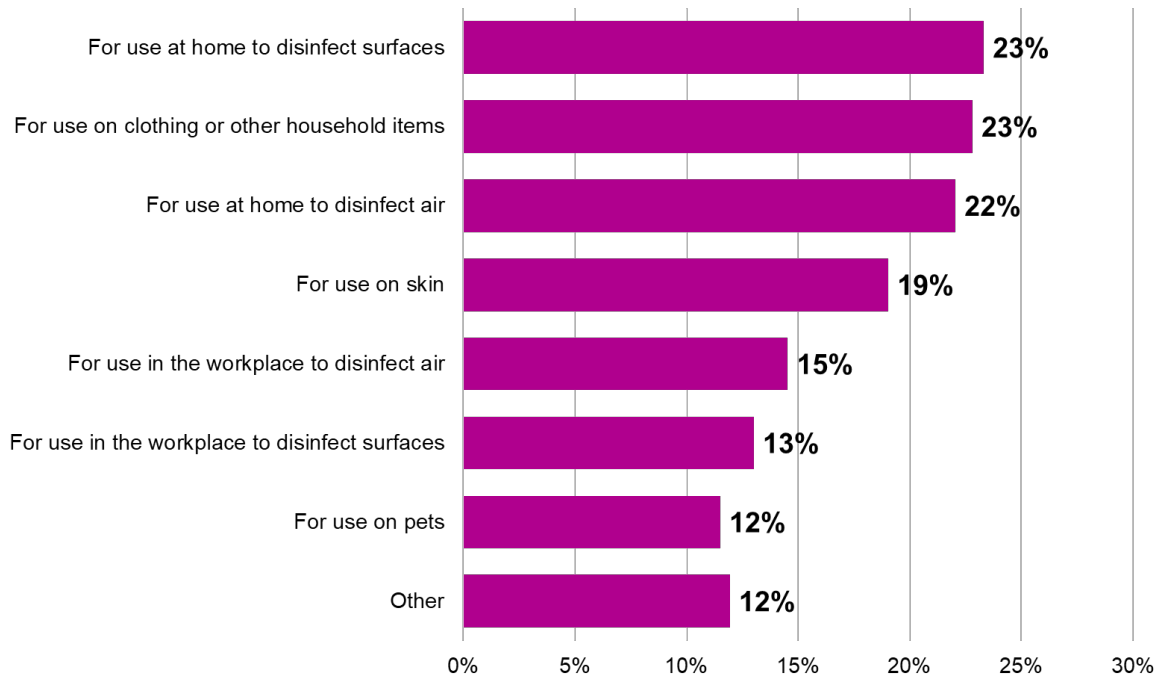
- 3% purchased their UV device during the COVID-19 pandemic
- 1% purchased it prior to the pandemic
- 7% didn't purchase the device, but own/ have access to one

UV light devices

Of those people who have a UV light sanitising device, around half (48%) use the device at least once a week. Although 16% report they never use it. People use the devices for a short period of time with 26% saying use is less than five minutes and 27% that the device is used for between six and 15 minutes.

People use a UV light sanitising device for various reasons. Close to a quarter use it to disinfect surfaces at home (23%) or for use on clothing and other household items (23%). Around a fifth of people use the device to disinfect the air at home (22%) or use it on skin (19%).

Figure 49: Reasons for using a UV light sanitising device

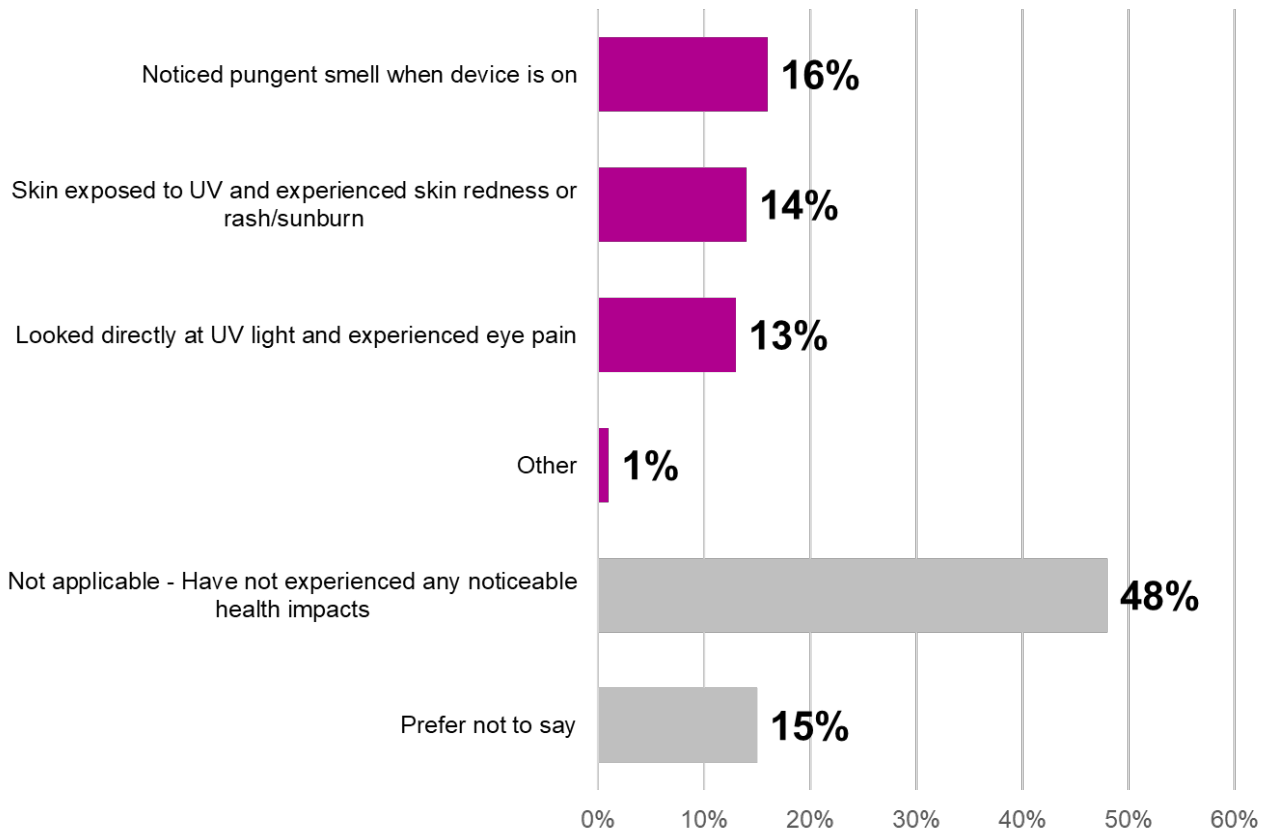


Q: For what purpose did you use the UV light sanitising device? Please select all that apply

Base: All respondents who have UV device (480)

Half (48%) of respondents with a UV light device have not experienced any noticeable health impacts from using a UV light device. However, some have experienced a pungent smell (16%), skin redness/ rashes (14%) or experienced eye pain (13%).

Figure 50: Negative health impacts from using a UV light device

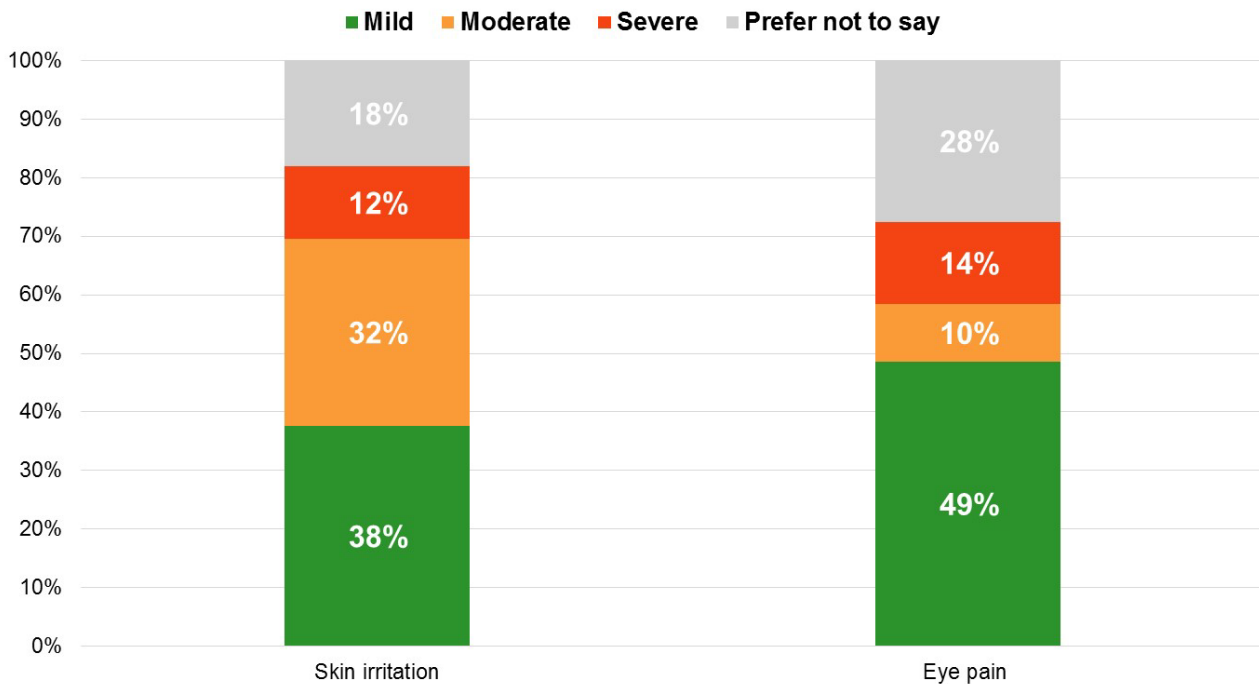


Q: Have you experienced any of the following during or shortly after using the UV light device? Please select all that apply.
 Base: All respondents who have UV device (480)

Of the people that experienced a negative impact, it is more common to experience a pungent smell (38% of those that experienced this said it was many times). Close to half of people who experienced a skin irritation said this was experienced three times or less (46%). With a similar proportion of people who experienced eye pain saying this was three times or less (45%).

For half (49%) of people experiencing eye pain after using a UV light device the most serious incident had mild side-effects. But 14% did experience severe eye pain on at least one occasion. Two fifths of people (38%) who experienced skin irritation said it was mild and for a third (32%) it was moderate. With one in ten experiencing severe skin irritation on at least one occasion.

Figure 51: Seriousness of health impacts experienced from using a UV light device

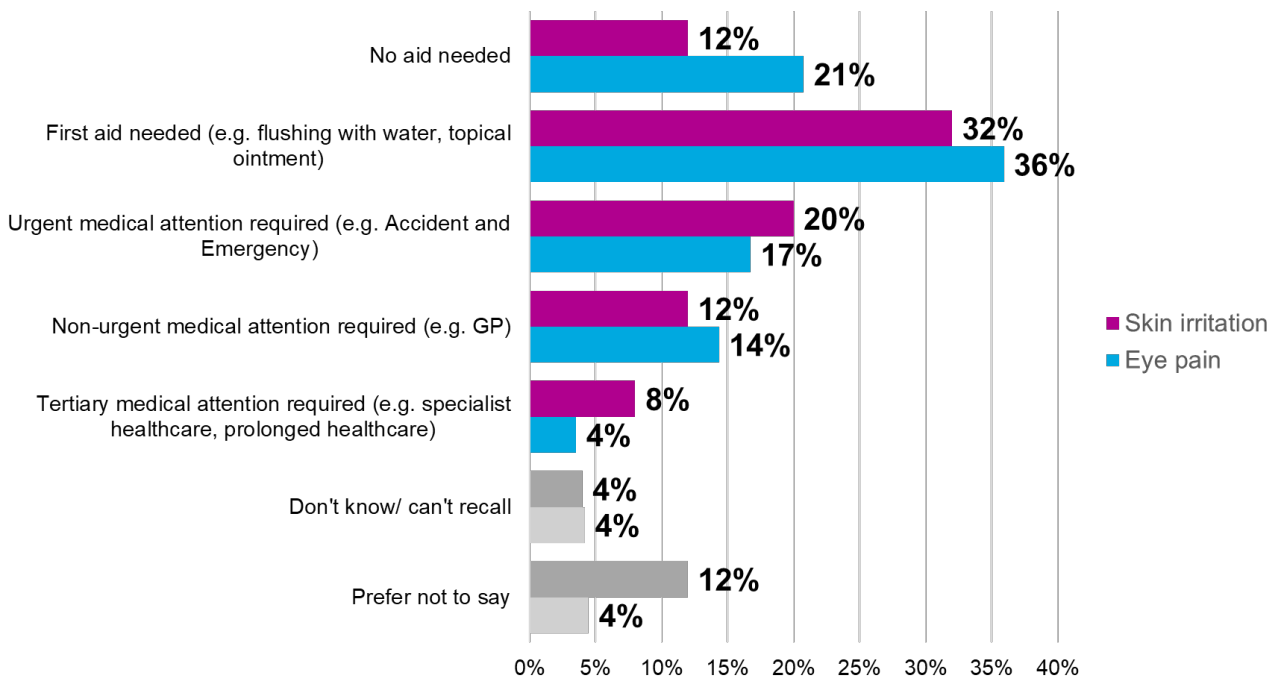


Q: For the following question, if you have experienced these side effects more than once, please think about the most serious example. How severe were these side-effects?

Base: All respondents who have experienced eye pain (54) or skin irritation (60) from using a UV light device

Seven in 10 people who experienced eye pain (71%) or a skin irritation (72%) after using a UV light sanitising device said they required medical attention. Most commonly for both health impacts this was in the form of first aid (eye pain -36%), skin irritation – 32%). Furthermore, a fifth of people who experienced skin irritation (20%) or eye pain (17%) required urgent medical attention.

Figure 52: Seriousness of health impacts experienced from using a UV light device



Q: What aid was needed after experiencing these side-effects?

Base: All respondents who have experienced eye pain (54) or skin irritation (60) from using a UV light device

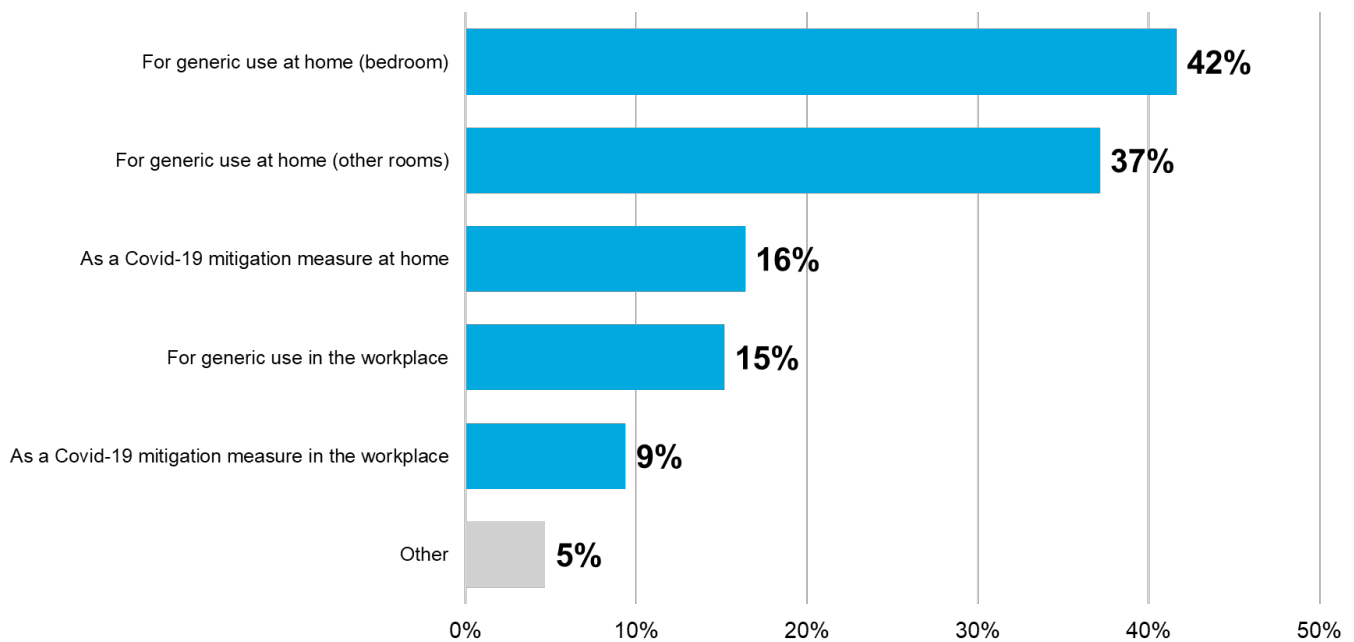
Air cleaners/ purifiers

Most commonly those with air purifiers have them for generic use at home either in the bedroom (42%) or other rooms (37%). Use of air purifiers in other rooms of the house increases with age with those aged 50 and over (56%) significantly more likely to have them in other rooms than those aged 18 to 49 (29%). By contrast, unsurprisingly those aged 18 to 49 are significantly more likely than those aged 55 and over to have them for generic use in the workplace (20% compared with 5%) or as COVID-19 mitigation in the workplace (12% compared with 3%).

Around one in six (16%) use them for COVID-19 mitigation at home. This is significantly higher among younger age groups with one in five (21%) 18 to 29 year olds citing this purpose compared with one in ten (9%) of those aged 50 to 64. Use of these devices for COVID-19 mitigation at home is also higher among those with a disability compared with those without (22% compared with 12%).

When comparing ethnicities, White respondents are significantly more likely than those from ethnic minority backgrounds to have their air cleaning device for generic use in the bedroom (44% compared with 34%) whereas those from ethnic minority backgrounds are significantly more likely than white respondents to have them as a COVID-19 mitigation measure in the home (27% compared with 13%). Further, those from ethnic minority backgrounds are more likely to have the devices for generic use in the workplace (23% compared with 12%).

Figure 53: Purpose of air cleaner/purifier



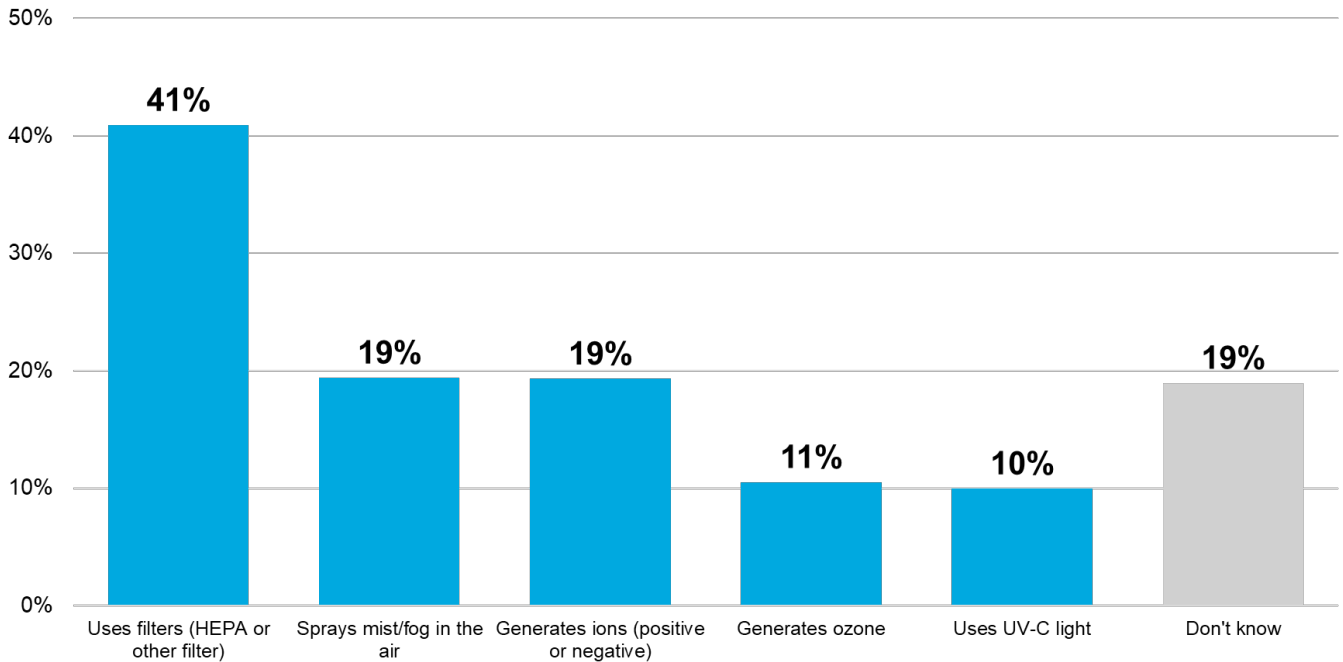
Q. You previously said you have an air cleaner / purifier... For what purpose do you use the device? (Please select all that apply).
 Base: All who have an air cleaner (n=771)

Most commonly, air purifiers which use filters are used (41%). This is followed by around one in five which generate ions (19%) or spray mist in the air (19%).

Whilst those that use a filter remain most commonly used by those with disabilities (42%), they are significantly more likely than those without disabilities to use air cleaners which spray mist in the air (23% compared with 17%) or which use UV-C light (13% compared with 8%).

There are differences between white respondents who have an air cleaner and those from ethnic minority backgrounds. For those from ethnic minority backgrounds, air cleaners which use filters are used significantly less than those from white backgrounds (29% compared with 45%) and use of air cleaners which spray mist are more likely to be used (26% compared with 17%). Those from ethnic minority groups are also more likely than white respondents to use air cleaners which generate ozone (17% compared with 8%) or which use UV-C light (15% compared with 8%).

Figure 54: Mode of operation of air cleaner/purifier

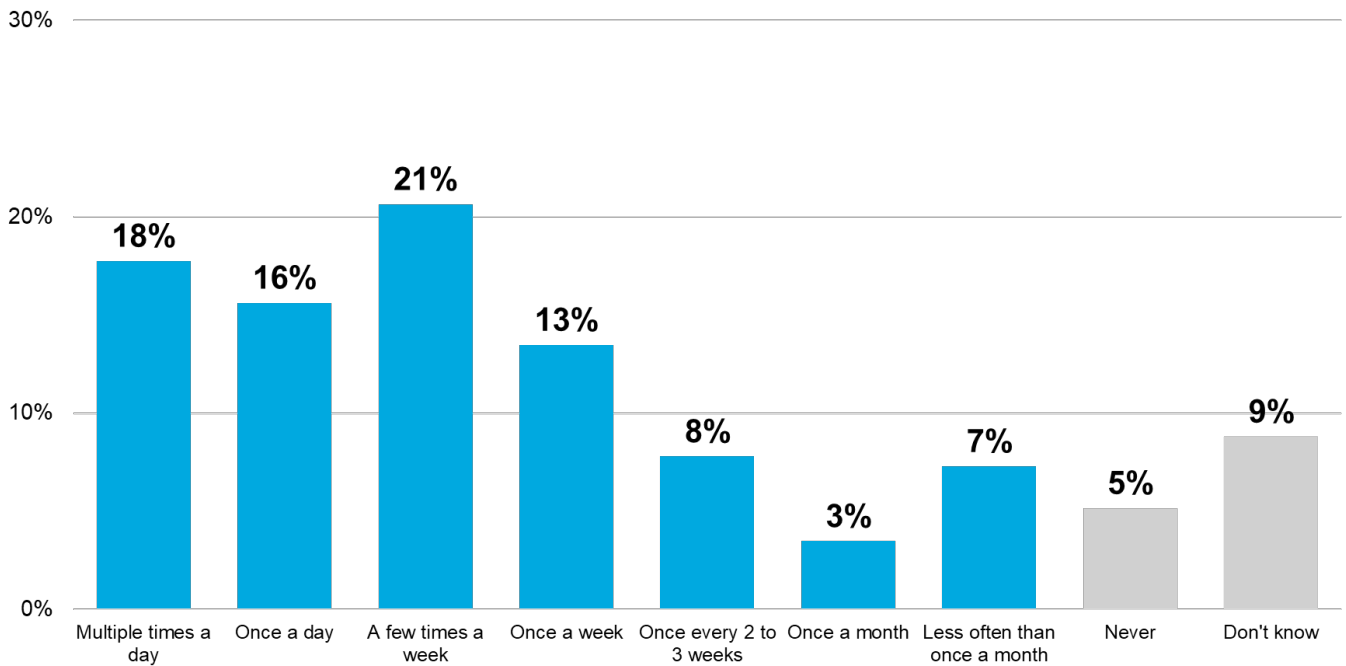


Q. What is the mode of operation of the air cleaner/purifier? Please select all that apply.
 Base: All who have an air cleaner (n=771)

A third (33%) of those with air purifiers use their air cleaning device at least once a day with close to one in five (18%) doing so multiple times a day. Perhaps related to being more likely to have them in the house, older adults (aged 50 and over) are more likely than those aged 18 to 49 to use their air cleaning device at least once a day (46% compared with 28%).

When using their air cleaning device, over a third (37%) use it for more than an hour (37%). In addition to using air cleaning devices less frequently, younger adults use them for shorter periods of time. Those aged 30 to 49 are less likely than those aged 50 to use if for more than an hour (36% compared with 47%).

Figure 55: Frequency of use of air cleaner/purifier

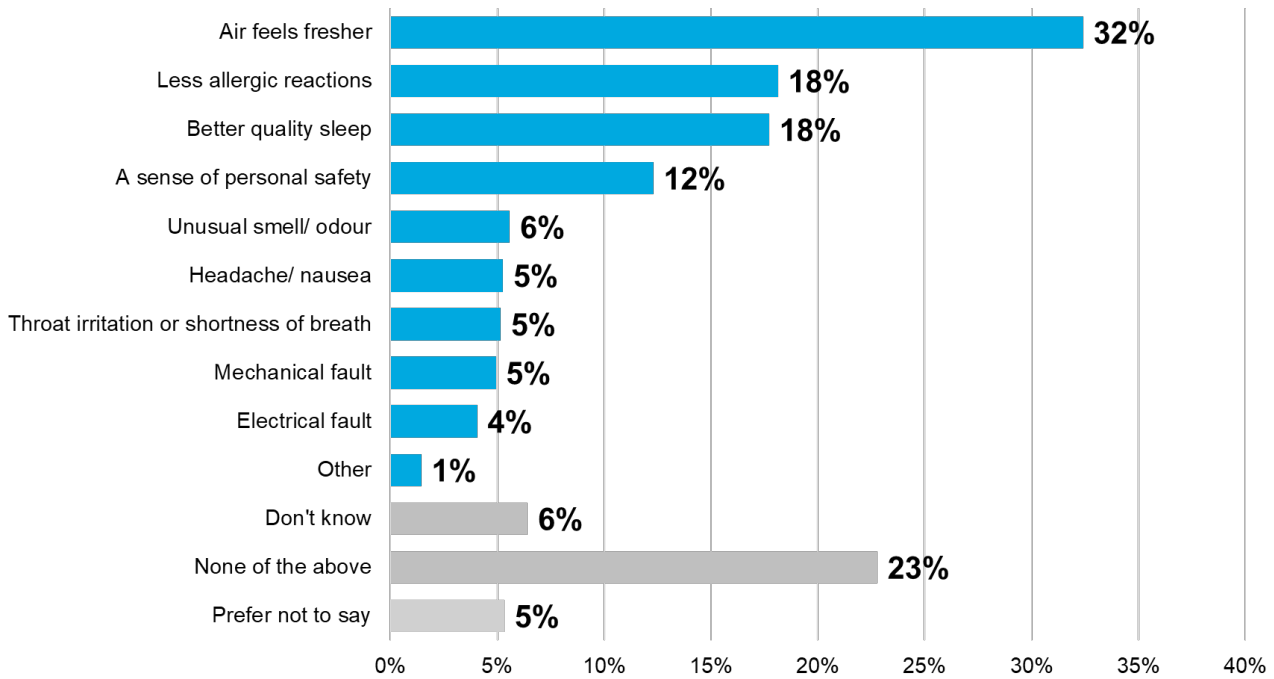


Q. How often, if at all, do you generally use the air cleaning device?
 Base: All who have an air cleaner (n=771)

Sizeable proportions have experienced benefits when using their air purifiers. Almost a third (32%) of those with an air cleaner cite that the air feels fresher and close to one in five have experienced better quality sleep (18%) or fewer allergic reactions (18%).

Further, those who have a health condition are significantly more likely than those with none to report the air feeling fresher (36% compared with 27%) or fewer allergic reactions (22% compared with 14%). Additionally, those with health conditions are significantly more likely to report a sense of personal safety (15% compared with 8%). Similarly, those with disabilities are significantly more likely than those without to report better quality sleep (23% compared with 14%) or a sense of personal safety (16% compared with 10%).

Figure 56: Experienced when using air cleaner/purifier



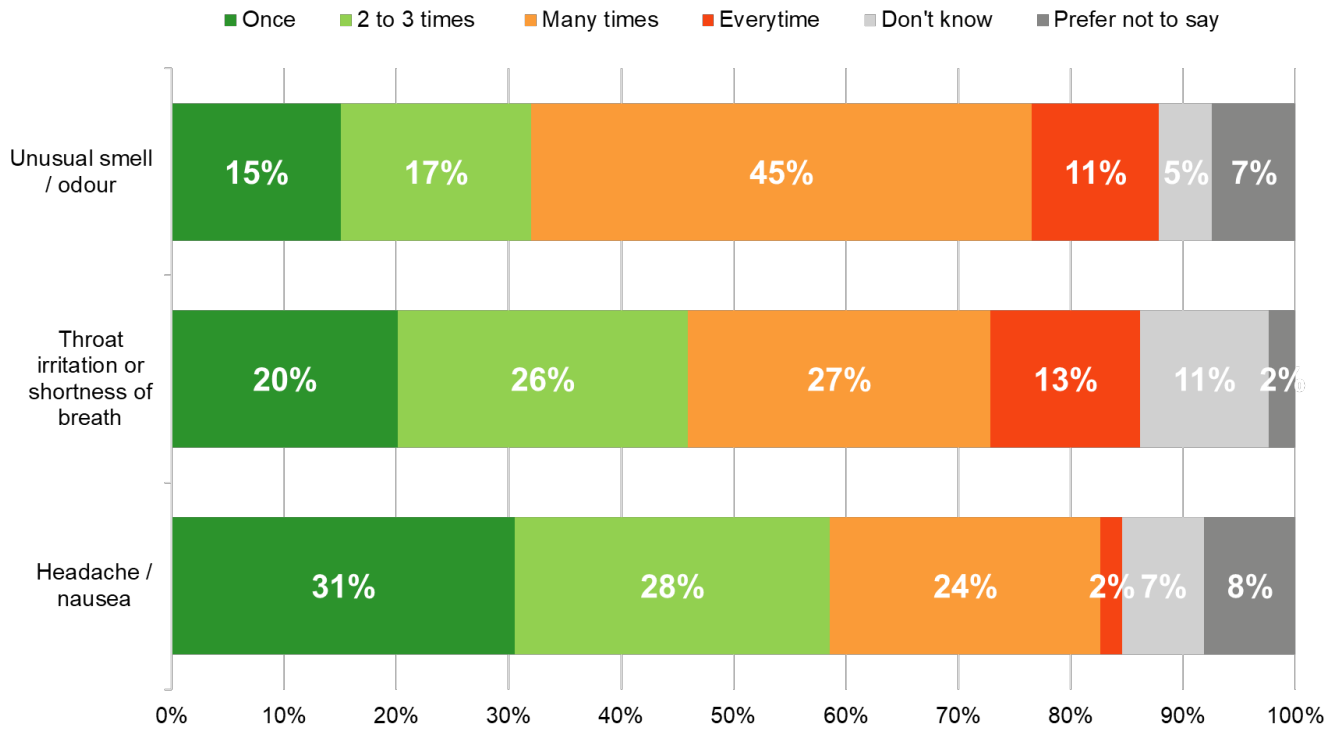
Q. Which, if any, of the following have you experienced with your air cleaner/ purifier? Please select all that apply.
 Base: All who have an air cleaning device (n=771)

Few (14%) have experienced side effects from using their air cleaner. Around one in twenty have experienced an unusual smell/odour (6%), headache or nausea (5%) or throat irritation or shortness of breath (5%).

For those who experience an unusual smell or odour when using the device, this is likely to have happened many times (45%) and one in nine (11%) experience this every time they use the device (Figure 59).

Those who have experienced a headache or nausea are more likely to have experienced this once (31%) or 2 to 3 times (28%). However, a quarter (24%) report having experienced this many times. Similarly, for those who have experienced throat irritation or shortness of breath, there is a fairly even split between regularity of this experience with one in five (20%) having only experienced this once, but a quarter having done so 2 to 3 times (26%) or many times (27%).

Figure 57: Frequency experienced side effects when using air cleaner/purifier



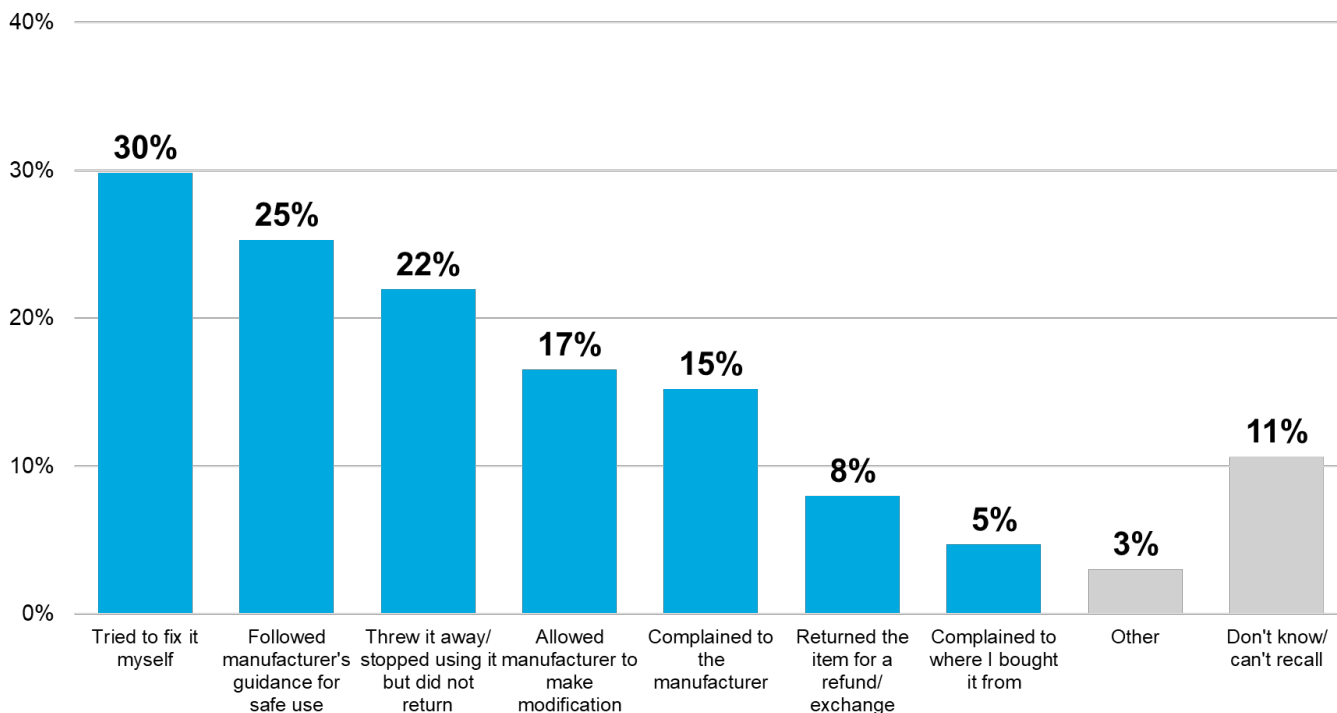
Q. How many times have you experienced these side-effects?

Base: Unusual smell / odour (n=40), Throat irritation or shortness of breath (n=38), headache / nausea (n=40)

For both those who experienced a headache or nausea, or throat irritation or shortness of breath, two in five reported that these symptoms were mild (41% and 40% respectively). A third (34%) of those who experienced a headache or nausea did not need any aid and around one in six (17%) needed first aid. For those who experienced throat irritation or shortness of breath one in five (19%) did not need any aid and three in ten (30%) needed first aid.

When experiencing a problem with the device, those who experienced a negative side effect are most likely to have tried to fix it themselves (30%), followed manufacturer’s guidance for safe use (25%) or thrown it away or stopped using it (22%).

Figure 58: Actions taken after experiencing side effects when using air cleaner/purifier



Q. Which of the following actions did you take after experiencing these problems with the UV light device? Please select all that apply.

Base: All who experienced side effect (n=142)

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