Office for Product
Safety & Standards

OPSS Product Safety and Consumers: Wave 4

Wave 4 research findings

December 2023

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Perceptions of safety

- Representing a continual decline from wave two, half (49%) of the UK public feel that the UK's system for regulating the safety of products ensures that products they buy are safe either completely or to a great deal.
- The general public's outlook remains largely unchanged in considering safety when purchasing a product compared to previous waves. The safety of the product is identified by close to one in ten (8%) as a factor considered when making a purchase.
- As with previous waves, consideration of product safety varies across product type, increasing when purchasing baby products (29%) or toys (15%).
- The majority (84%) agree that they expect a product to be safe regardless of the price, an attitude consistent with previous waves.
- Previous experience of buying a product remains the most commonly cited factor that builds trust in a product being safe (42%). This represents a slight increase since it was asked in wave two (39%), now returning to levels last seen in wave one.
- The importance that product branding plays in trust is declining; the proportion identifying brand name of manufacturer has decreased since it was last asked, from 30% to 23%. The brand name of the retailer has also seen a decline, although slightly smaller (16%, 14%).
- Trust is lowest in UK governmental departments (25%) and local government (31%), with both seeing declines compared to previous findings.
- The UK public has high levels of trust in consumer protection organisations (e.g., Citizens Advice, Which?), with three quarters (74%) saying they consider them to be trustworthy in how they operate towards them personally.

Focus on online purchasing

- Online retailers continue to be seen as a safe online rake retail environment (84%), while half view products from Amazon marketplace as safe (52%) and a fifth think products from social media marketplaces are safe (21%).
- Caution around the safety of products purchased online varies with type asked about – phone chargers elicited the highest levels of caution (56%) while musical greeting cards prompted the lowest levels of caution (15%).
- Online shopping also varies by product category. Half of those who had bought electrical appliances (50%) or large domestic appliances (48%) in the last six months, said they bought the majority of these online, while only around a fifth said the same for purchases of homeware (21%) or cosmetics (17%).

- Convenience is cited as the top reason people buy gifts online (66%), while those who purchase gifts offline prefer to see the gift themselves (40%). Product safety is only cited by a minority in either case, but more so for offline[1] gift shoppers than online (7% vs 3%).
- Overall, six in ten UK adults have purchased something from an online marketplace in the last six months (60%) while a quarter have sold something (27%). eBay is the most popular online marketplace for both buying (33%) and selling products (14%).

Focus on labelling

- Overall reported awareness of conformity assessment marks relevant to different product types has declined, with increasing proportions reporting that they do not know what marks they would look for or that they would not look for any when purchasing a particular product.
- When purchasing electrical equipment, two in five (36%) report looking for a CE mark. This is also the case when thinking about purchasing large domestic appliances (33%), although both products have seen a decline compared to the previous wave of tracking.
- Comparatively, when purchasing baby products or toys, close to one quarter report looking for the Age Warning Logo (28% and 24% respectively).
- Just under two fifths (36%) 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, a ten-percentage point decline compared to wave two.
- Just under half (48%) of UK adults correctly identify the meaning of the Age Warning label, and slightly fewer (44%) correctly identify the meaning of the display label pursuant to Regulation 10 FFRs. Of those tested, these are the most recognised conformity assessment marks' definitions.
- The UKCA mark has low awareness, with less than one in ten reporting they would look for it across any of the products shown. In line with this lower identification, six in ten report that they do not know what the UKCA mark meant. That said, awareness of the definition is consistent with the last time this was asked (16%).
- Respondents were asked their preference to use a range of product labels. As seen in previous waves, the plurality would prefer to access safety information through a physical product / label (48%).
- Under one in ten (8%) 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) (3%). Both options are more popular among younger respondents.

[1] By 'offline' this refers to purchases made in-store or in-person.

- Participants in the qualitative research are concerned about product safety and how the products they purchase might be affected by lower product safety standards post-Brexit. The EU CE label was widely perceived to be a sign of trustworthiness and a sign of high-quality product standards.

Experiences of safety issues

- Of respondents who bought a product within the last 6 months, 9% report experiencing a safety issue of some kind.
- Those who bought changing tables (27%), baby carriers (23%), and gas appliances (23%) are the most likely to have a safety issue.
- Issues with baby products are reported as the most serious by respondents (average severity of 5.8 out of 10).
- Distress and increased stress is the most common impact from a safety issue with a product (24%), with the exception of 'none of the above' (48%).
- Of those who experienced physical harm due to a safety issue, 32% needed no form of aid. While 22% required urgent medical attention and 20% needed first aid.
- Consistent with previous waves, the most common action taken by those who have a safety issue is to return/ refund the product (22%). This is followed by complaining to where the respondent bought it from (17%) and throwing it away but not returning and trying to fix it themselves (both 15%).

Perceptions and experiences of product registration

- The UK public is generally comfortable with automatic registration, so that the owner can be contacted in the event of a safety issue, either at the point of purchase (61%) or at the point of registration (62%).
- Previous waves noted that those with high education levels are less likely than low education levels to register an eligible product. Here, those with high education levels are more likely to feel comfortable with automatic registration than those with low education levels.

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, food), construction products, and for legal metrology, OPSS protects people and places from product-related harm, ensuring consumers and businesses can buy and sell products with confidence.

As OPSS's Product Regulation Strategy 2022-2025 notes, product regulation must align with changing technology, evolving markets, and shifts in the needs of society. It should be informed by an understanding of the real world and real people to reflect differences of need and vulnerability.

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 OPSS's Product Regulation Strategy 2022-2025.

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. 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 fourth wave of tracking, including comparisons against wave one, two, and three where applicable. The report also includes an exploration of key topical policy areas including online purchases, e-labelling, inclusive design, and safety gates.

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

Approach

The findings are based upon a large-scale representative sample of 10,156 people from across the United Kingdom (UK) collected through online research methods. Fieldwork was carried out between 22nd June and 5th July 2022. A supporting survey of 252 people who are very low or non-internet users was conducted via telephone between the 6th July to 28th July 2022.

After the close of the online survey, four text-based online focus groups were conducted with survey participants. Groups were split by age, social grade, and parental status and included a mix of genders, ethnicities, and locations. There were 12-14 participants per group, each group lasted 90 minutes. Participants were asked to respond to an open-ended question as part of the recruitment criteria to ensure that participants were able to communicate effectively enough to participate in text based research. Participants were incentivised via retail vouchers, in line with the MRS Code of Conduct.

Where appropriate, comparisons have been made with survey data from wave one, two, and three. Not all sections or questions are asked in every survey. The technical report contains details of wave-on-wave questionnaire design and section inclusion.

The sample sizes and fieldwork dates for wave one, two, and three of the survey are listed below:

- The wave one online survey sample size was 10,230 UK adults. Fieldwork was undertaken between 17th and 30th November 2020.
  Wave one offline survey sample size was 512 UK adults. Fieldwork was undertaken between 23rd November and 12th December 2020.
- The wave two online survey sample size was 10,296 UK adults. Fieldwork was undertaken between 17th May and 15th June 2021.
  The wave two offline survey sample size was 251 UK adults. Fieldwork was undertaken between 3rd and 28th June 2021
- The wave three online survey sample size was 10,187 UK adults. Fieldwork was undertaken between 23rd November and 14th December 2021.
  The wave three offline survey sample size was 251 UK adults. Fieldwork was undertaken between 25th November 2021 and 5th January 2022.

Blue boxes have been included throughout to highlight findings from the offline sample or demographic analysis from the online survey which particularly involved minority groups.

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

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

In wave four, questions on perceptions of safety were shown to all respondents (n=10,156). Exact base sizes for specific questions are shown below each chart.

Key findings

- Representing a continual decline from wave two, half (49%) of the UK public feel that the UK's system for regulating the safety of products ensures that products they buy are safe either completely or to a great deal.
- The general public's outlook remains largely unchanged in considering safety when purchasing a product compared to previous waves. The safety of the product is identified by close to one in ten (8%) as a factor considered when making a purchase.
- As with previous waves, consideration of product safety varies across product type, increasing when purchasing baby products (29%) or toys (15%).
- The majority (84%) agree that they expect a product to be safe regardless of the price, an attitude consistent with previous waves.
- Previous experience of buying a product remains the most commonly cited factor that builds trust in a product being safe (42%). This represents a slight increase since it was asked in wave two (39%), now returning to levels last seen in wave one.
- The importance that product branding plays in trust is declining; the proportion identifying brand name of manufacturer has decreased since it was last asked, from 30% to 23%. The brand name of the retailer has also seen a decline, although slightly smaller (16%, 14%).
- Trust is lowest in UK governmental departments (25%) and local government (31%), with both seeing declines compared to previous findings.
- The UK public has high levels of trust in consumer protection organisations (e.g., Citizens Advice, Which?), with three quarters (74%) saying they consider them to be trustworthy in how they operate towards them personally.

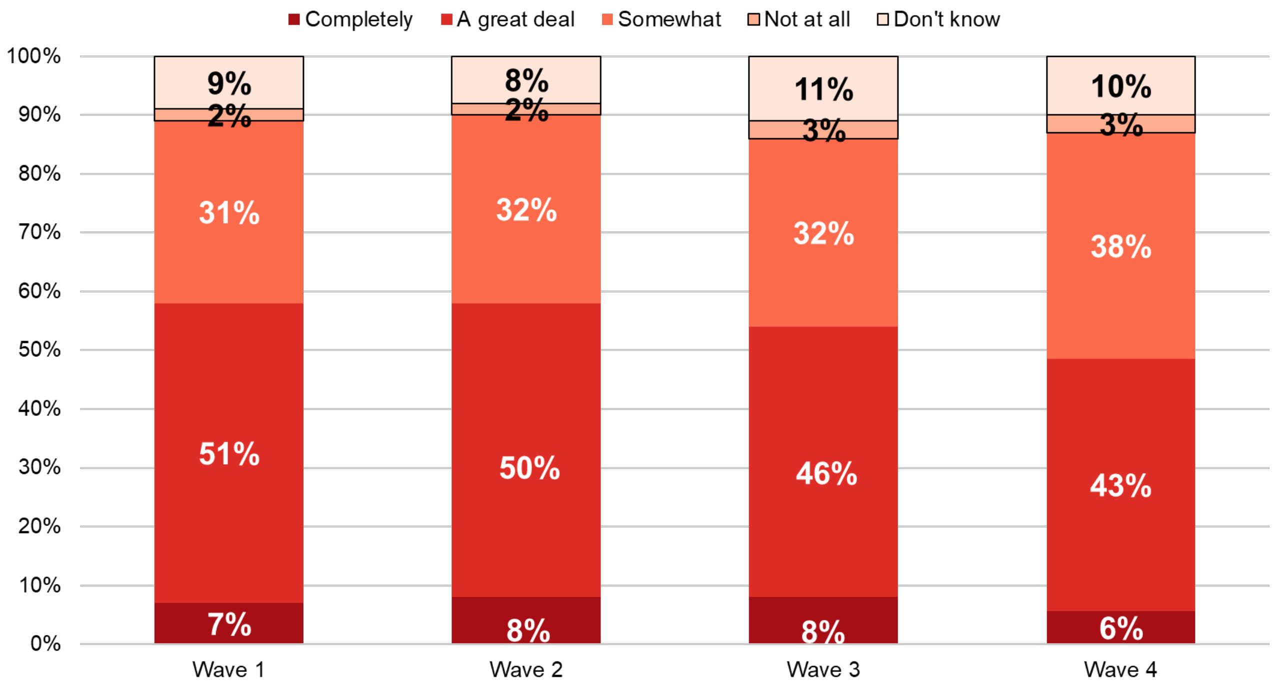
The UK system for regulating product safety

Half (49%) of the UK public feel that the UK's system for regulating the safety of products ensures that the products they buy are safe either 'completely' or to a 'great deal'. This is a continuation of the downward shift observed in wave three (53%) after consistent attitudes in wave one and two (58%). However, while in wave three the decline came as a result of increasing uncertainty, this wave instead has seen a corresponding increase in the proportion reporting that it somewhat ensures safety (from 32% to 38%). Those who feel the system doesn't keep products safe at all (3%) remain consistent wave on wave.

As with previous waves, younger people (aged 18 to 29) are less likely to feel that the UK's system for regulating the safety of products completely or to a great deal ensures that products they buy are safe (44%), compared to all older age groups (48% 30 to 49; 49% 50 to 64; 52% 65+). However, with the exception of those aged 65 and over, all age groups have seen declining attitudes this wave compared to wave three (wave three: 48% 18 to 29; 53% 30 to 49; 59% 50 to 64; 53% 65+).

Men are also more likely to report that the UK regulatory system ensures safety compared to women (51% vs. 47%), and as with age, this represents a decline for both audiences compared to all previous waves.

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



Q: To what extent do you feel that the UK's system for regulating the safety of products ensures that products you purchase are safe?
Base: All respondents (W1=10,230, W2=10,296; W3=10,187; W4=10,156)

In previous waves, white respondents were more likely to feel that the UK system ensures products are safe compared to ethnic minority respondents[2], however this is no longer the case due a sharp decline from the previous wave (54% to 49%). While ethnic minority respondents report a slight decline in attitude, the changes are not statistically significant. (51% to 47%).

[2] In this analysis, white minorities such as Gypsy, Roma, and Irish Travellers are included in the aggregated "white" figures. Figures for ethnic minority respondents do not include white minorities. More information on demographics can be found in the accompanying technical report.

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 – 46% compared with 50% of heterosexual people[3]. While this proportion remains consistent with last wave for those identifying as LGB+, heterosexual respondents have reported declining sentiment since wave two (60% W2; 55% W3).

Factors that influence perceptions of safety and product purchasing

The general public's consideration of safety when purchasing a product remains largely unchanged; product safety is cited by close to one in ten (8%) as a determining factor in their purchase of a product they were asked about. Women continue to be more likely than men to identify product safety (9% compared to 7%), and those aged 65 years and over (12%) are more likely than any other age group to identify product safety as a factor (5% 18 to 29; 8% 30 to 49; 7% 50 to 64).

Despite consideration into safety remaining unchanged, the importance of a product's quality has decreased compared to the previous wave (38% from 43%), this is evident across most of the demographic subgroups.

Product safety is more likely to be considered by those of a low educational attainment (9%), compared to those with a high educational attainment (7%), but both groups have consistent attitudes to the quality of a product. Those with a higher educational attainment are more likely to identify environmental impact (6% vs 4%) and the style (18% vs 15%) as a key factor in their purchase of that product.

Those who have a disability are more likely to report considering the safety of the product before making a purchase, compared to those without (10% vs 7% respectively).

Heterosexual respondents (8%) are more likely to report considering product safety compared to LGB+ respondents (5%).

In the qualitative groups, participants said they often compared reviews and ratings online before making purchases. Reading the reviews of other buyers was helpful for them to know what to expect from a product alongside checking for safety markings or labels.

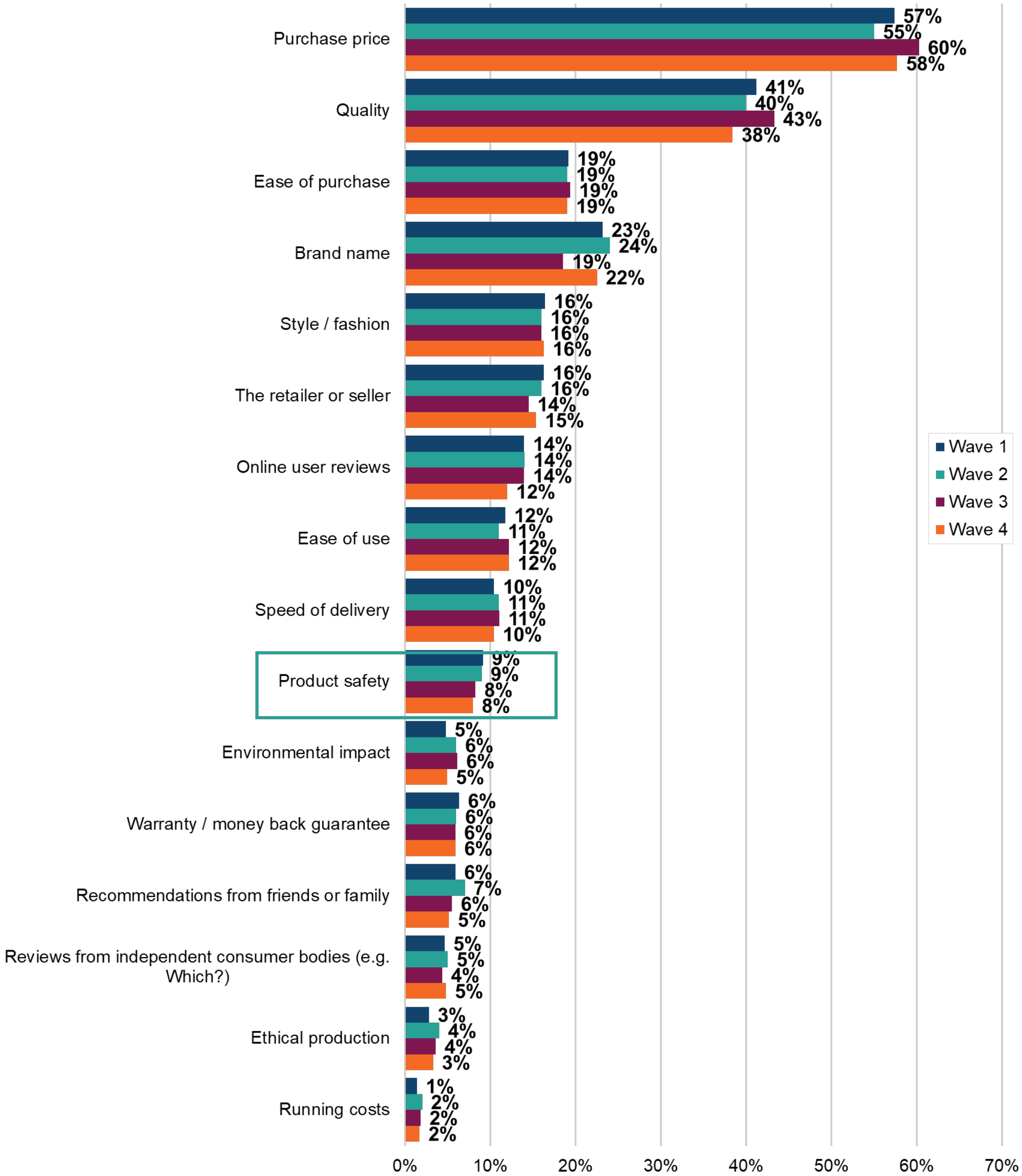
Some participants said they frequently bought from trusted vendors (e.g., John Lewis) so they knew the product was of good quality.

"I review it online and talk to friends/family about the options for the products." 41+

"I'll probably google as much as possible, check reviews from a few websites (trust pilot, the retailer's website, Google reviews etc)." 18 – 40 year-olds, lower socio economic group (C2DE)

[3] Results are analysed by sexual orientation, i.e. comparing heterosexual respondents against those who identify as lesbian, gay, bisexual, or another sexuality (LGB+). Analysis does not include transgender/ non-binary gender identities. More information on demographics can be found in the accompanying technical report.

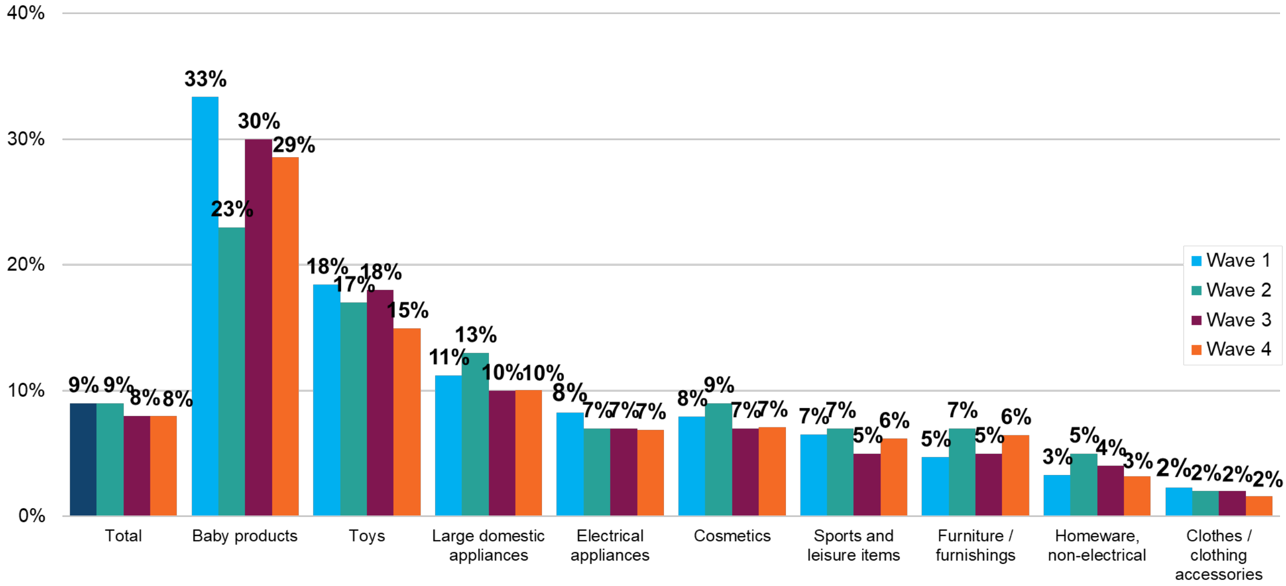
Figure 2. Factors taken into account when purchasing a product



Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents allocated a product (W1=7,680; W2=8,260; W3=7,667; W4=7,577)

Similar to prior waves, there are key differences when analysing the role of product safety in purchase choice when looking at the type of product purchased. As figure three shows, when purchasing baby products (29%) or toys (15%) the consideration of product safety is much higher than when purchasing other categories of products and sits in the top three factors considered for both baby products and toys, alongside purchase price (47% baby products, 58% toys) quality of the product (39%, 34%).

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



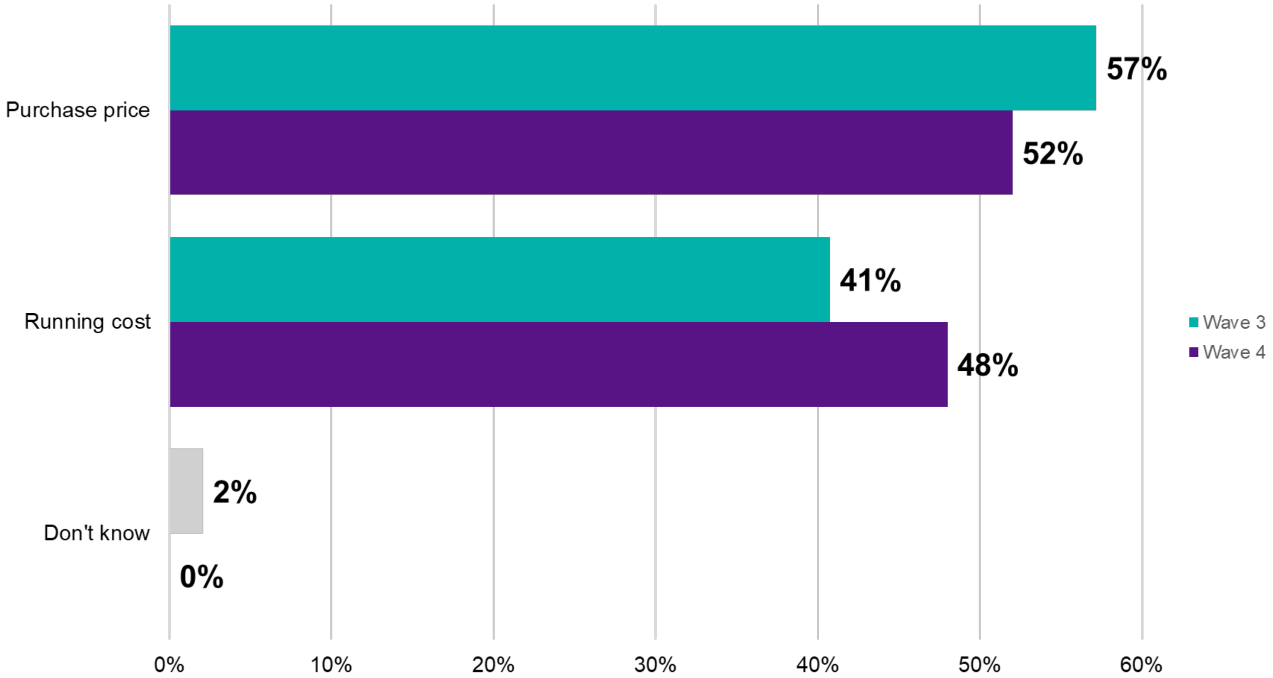
Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: All respondents (W1=7,680; W2=8,260; W3=7,667; W4=7,577), product asked about: baby products (W1=386; W2=314; W3=385; W4=394), toys (W1=943; W2=925; W3=930; W4=812), large domestic appliances (W1=674; W2=676; W3=661; W4=606), electrical appliances (W1=1,039; W2=1,235; W3=1,021; W4=976), cosmetics (W1=986; W2=1,285; W3=998; W4=1,491), sports and leisure items (W1=990; W2=886; W3=862; W4=686), furniture/ furnishings (W1=1,072; W2=974; W3=1,044; W4=784), homeware (W1=577; W2=753; W3=641; W4=575), clothes/ clothing accessories (W1=1,013; W2=1,212; W3=1,125; W4=1,253)

Product safety ranks comparatively lower for many other products, for example, consideration of product safety for electrical products is relatively low (7%) - instead purchase price (57%), quality (33%) and brand name (28%) are most commonly cited.

Comparing cost-based factors, purchase price (58%) is most frequently identified at an overall level, and relatively consistent compared to last wave (60%). Running costs is only identified as a consideration by a minority of respondents in wave four (2%).

As in wave three, those who identified both purchase price and running cost as key factors in purchasing a product were asked to evaluate which one was the most important (figure 4). Around half (52%) report that purchase price was the most important consideration, with a similar proportion (48%) who report the same for running cost. Due to the small base sizes for this question, any wave on wave changes are not statistically significant.

Figure 4. Comparative importance of purchase price and running cost



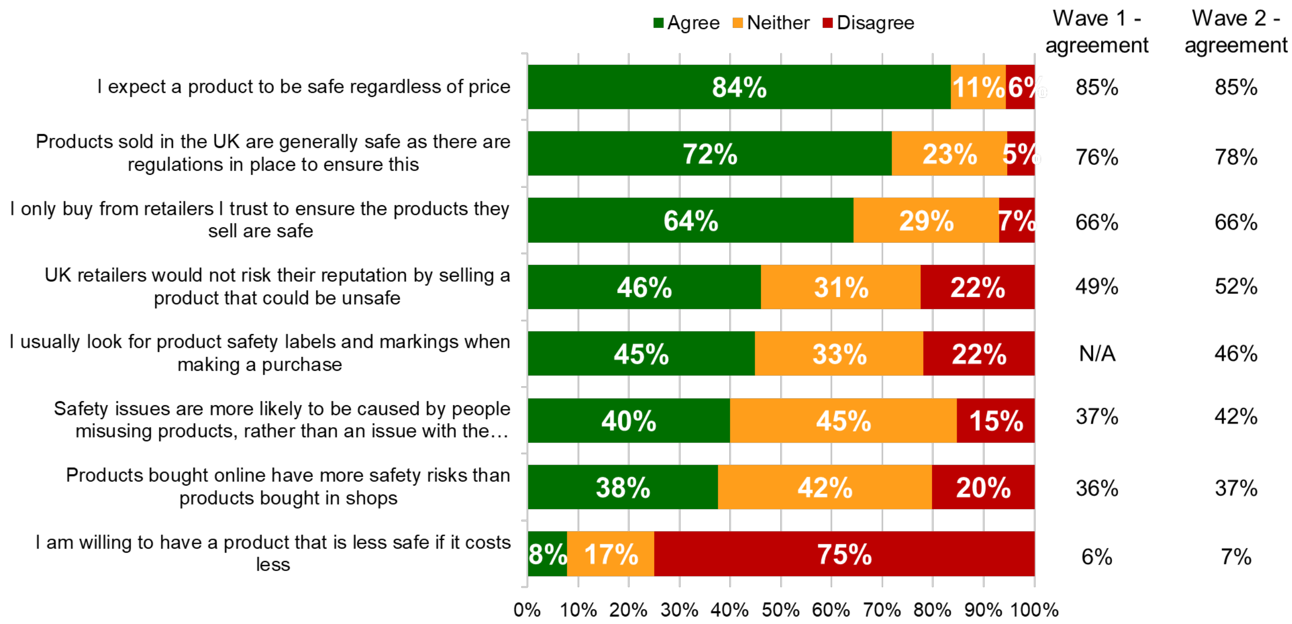
Q: You previously said they you took both price and running costs into account when buying If you had to choose… Which was most important to you when purchasing this product?
Base: All respondents who identified purchase price and running costs (W3=70; W4=65)

Public perceptions of safety

The UK public continues to expect a product to be safe regardless of the price they pay for it (84%), consistent with previous waves it was asked in. This attitude is driven by those with high education levels (87%), compared to those with a low (83%) and medium (81%) levels of education[4]. It is also more commonly held among older adults (86% 50+) compared to those aged 18 to 29 (78%). In a similar view, three quarters (75%) 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, while only 8% agree. Older respondents are much less likely to agree with this statement, compared to younger respondents (17% 18 to 29 vs 2% 65+).

[4] Throughout the analysis, respondents have been categorised into various education levels depending on the highest qualification they have attained. More information on demographics can be found in the accompanying technical report.

Figure 5. 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 (W1=10,230; W2=10,296; W3=10,156)

A little over seven in ten (72%) of the public agree that products sold in the UK are generally safe as there are regulations in place to ensure this, which represents a significant decrease compared to previous waves (78% W2; 76% W1). There has also been a decline in agreement that UK retailers would not risk their reputation by selling a product that could be unsafe (46% W4; 52% W2). For both of these statements the decreases are evident across most demographic subgroups.

Compared to when the question was last asked, respondents are consistent in looking for product safety labels and markings when making a purchase, sitting at just over two fifths (45% W4; 46% W2). This statement sees higher agreement among those aged 65 and over (57%) compared to all other age groups (35% 18 to 29; 39% 30 to 49; 49% 50 to 64).

Two-fifths (40%) agree with the statement that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself, broadly level with previous findings. This belief is more commonly held among those with low (42%) and medium (41%) levels of education compared to those with high levels(37%).

Slightly fewer think that products bought online have more safety risks than those bought in-store (38%), this is consistent with previous waves. Younger respondents appear to be more cautious when thinking about online purchases: agreement increases to 42% among those aged 18 to 29, significantly higher than those aged 65 and over (37%).

Two fifths (40%) agree with the statement that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself, representing a very slight decline on previous waves. This belief is more commonly held among those with low (42%) and medium (41%) levels of educational attainment compared to those with high (37%).

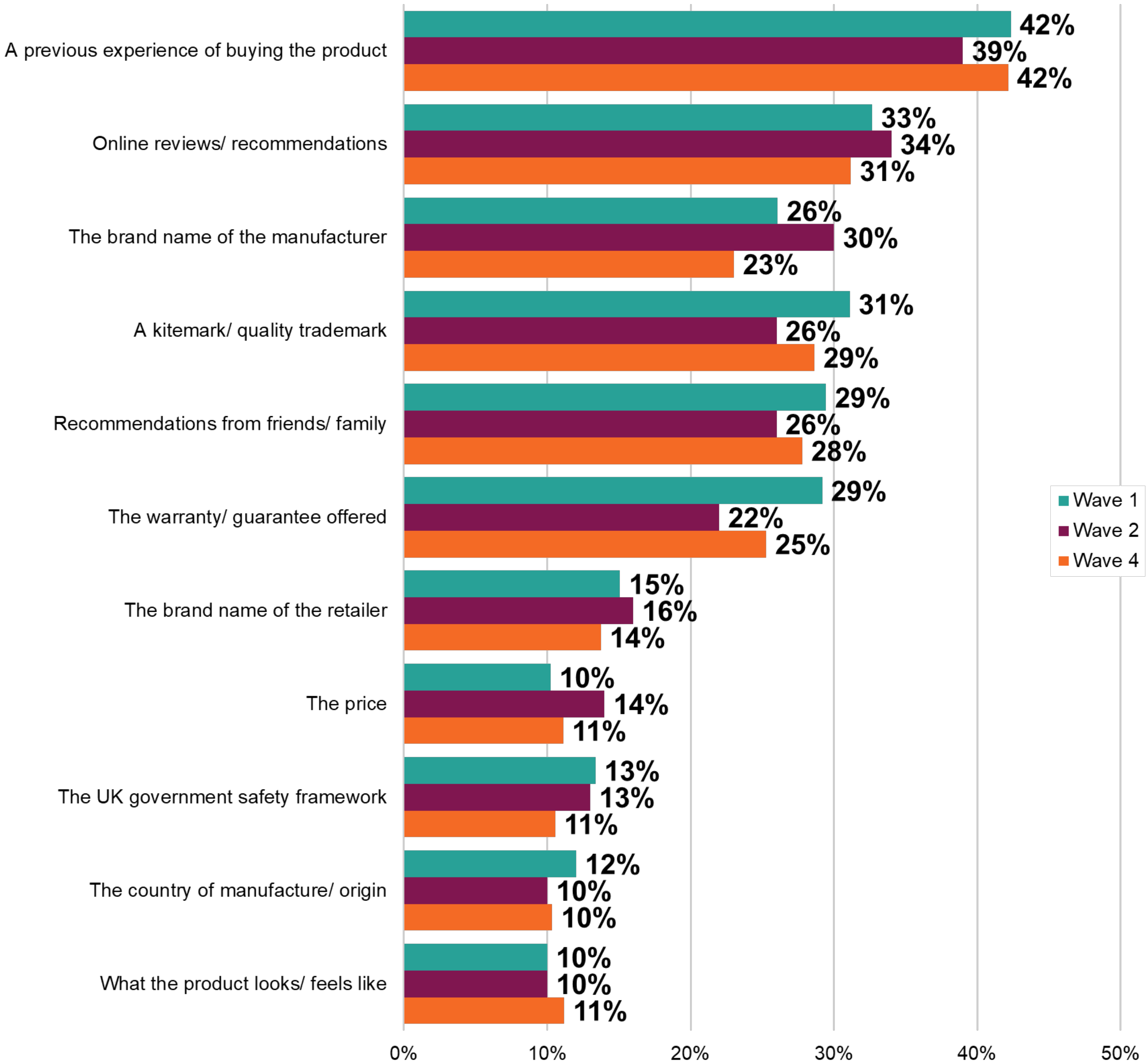
The offline sample are more likely to say they “only buy from retailers I trust to ensure the products they sell are safe” (77%), compared to the online sample (64%).

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 (42%). This represents a slight increase for this factor compared to wave two (39%), returning to levels seen in wave one (42%). Other factors such as online reviews (31%), and a kitemark/ quality trademark (29%) are also important in trusting in a product.

Comparatively, the brand name of the manufacturer has declined in importance by seven percentage points to 23%, a decline which is evident across most subgroups. Indeed, overall branding appears to be of less importance this wave, with the brand name of the retailer also declining since the question was last asked in wave two (14% W4; 16% W2), although not to the same extent. The decline in brand importance is mainly driven by younger, female respondents. For manufacturer branding, women observed a wave on wave decline from 28% to 21%, while those aged 18 to 29 see a decline from 24% to 18% and 16% to 13% for 30 to 49s.

Figure 6. 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?
Base: All respondents (W1=10,230; W2=10,296; W3=10,156)

When the question was last asked, there was a decline in importance of the warranty / guarantee offered (29% W1; 22% W2). This wave sees a slight uplift for this measure (25%), although not to the same levels measured in wave one. The warranty / guarantee is of lesser importance for younger respondents, with a fifth of those aged 18 to 29 selecting this option (19%), significantly lower than all other age groups (22% 30 to 49; 29% 50 to 64; 32% 65+).

The UK government safety framework is identified by one in ten respondents (11%), a factor which is driven by those aged 65 and over (13%), compared to those aged 18 to 29 (9%). Identification of this factor is largely consistent across all other audiences.

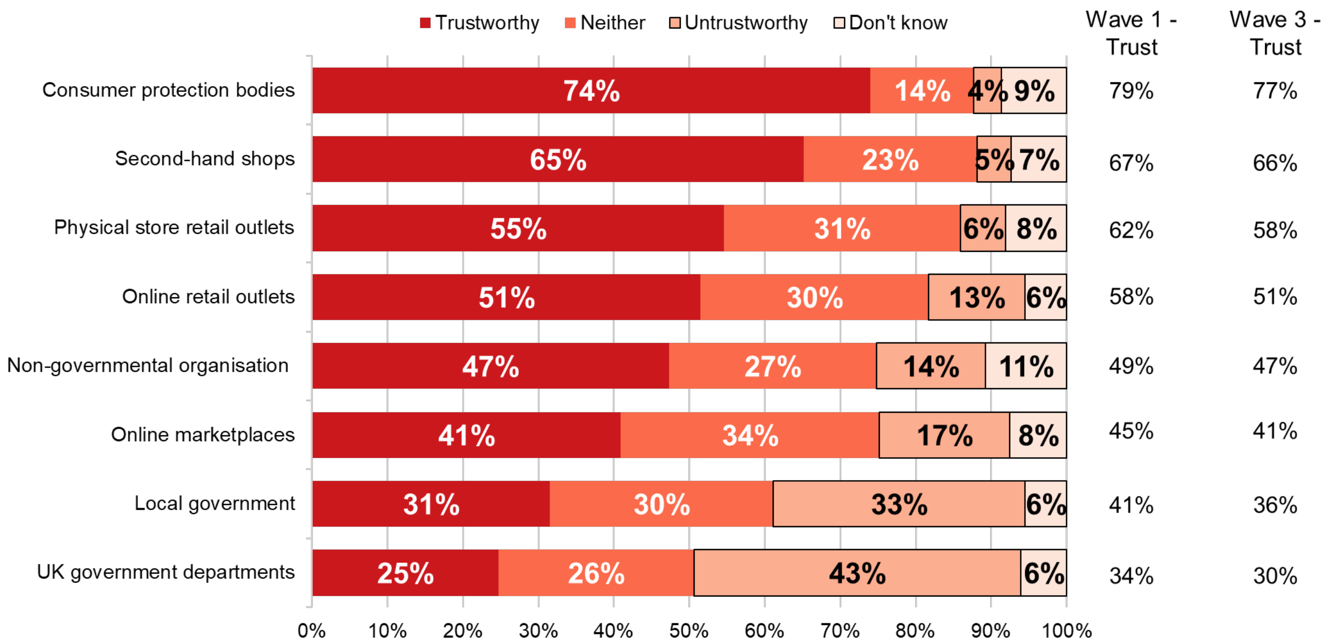
Trust in organisations associated with product safety

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

The UK public has strong levels of trust in consumer protection organisations (e.g., Citizens Advice, Which?), with three quarters (74%) saying they consider them to be trustworthy in how they operate towards them personally.

Over half the UK public consider second-hand shops (65%), physical store retail outlets (55%) and online retail outlets (51%) to be trustworthy in how they operate. However, physical store retail outlets have seen a decline in trust since wave three (58%) and wave one (62%), a trend which is generally evident across all demographic subgroups. Comparatively, trust in online retail outlets has stayed consistent this wave following a slight dip in previous findings.

Figure 7. Levels of trust in different organisations



Q: Of the following types of organisations, in general how trustworthy or not do you think each are in how they operate towards you?
Base: All respondents (W1=10,230; W3=10,187; W4=10,156)

The lowest levels of trust are seen in UK government departments (25%) and local government (31%), with both also experiencing a continual decline in trust compared to wave one and wave three. Both see a corresponding increase in the proportion reporting they are untrustworthy, with UK government departments increasing from 33% in wave one to 43% and local government increasing from 25% to 33%.

As seen in previous wave, trust in UK government increases with age: one fifth (21%) of 18 to 29 year olds report trust, compared to just under two thirds (33%) of 65 year olds and over. Although both groups report decreasing trust since wave three (26% 18 to 29s; 37% 65+).

In wave three, respondents with a disability were less likely than those without to identify UK government departments as trustworthy (27% with; 32% without). This is no longer the case in wave four – following a sharp decline among those without a disability, both groups are now even (24% with; 25% without)

Respondents identifying as LGB+ are also less likely to feel that UK government departments are trustworthy compared to heterosexual respondents (20% vs 26%).

Ethnic minority respondents are more likely to report trust for UK government departments (29%), compared to white respondents (24%).

Respondents from lower social grades (C2DE) are the least likely to find UK government departments (22%) and local government (27%) trustworthy, compared to those in higher social grades (ABC1) (27%, 35% respectively).

A focus on online purchasing

In wave four, questions on perceptions of safety were shown to approximately half of all respondents, allocated randomly (n=5,067). Exact base sizes for specific questions are shown below each chart.

Key findings

- Online retailers continue to be seen as a safe online retail environment (84%), while half view products from Amazon marketplace as safe (52%) and a fifth think products from social media marketplaces are safe (21%).
- Caution around the safety of products purchased online varies with type asked about – phone chargers elicited the highest levels of caution (56%) while musical greeting cards prompted the lowest levels of caution (15%).
- Online shopping also varies by product category. Half of those who had bought electrical appliances (50%) or large domestic appliances (48%) in the last six months, said they bought the majority of these online, while only around a fifth said the same for purchases of homeware (21%) or cosmetics (17%).
- Convenience is cited as the top reason people buy gifts online (66%), while those who purchase gifts offline prefer to see the gift themselves (40%). Product safety is only cited by a minority in either case, but more so for offline gift shoppers than online (7% vs 3%).
- Overall, six in ten UK adults have purchased something from an online marketplace in the last six months (60%) while a quarter have sold something (27%). eBay is the most popular online marketplace for both buying (33%) and selling products (14%).

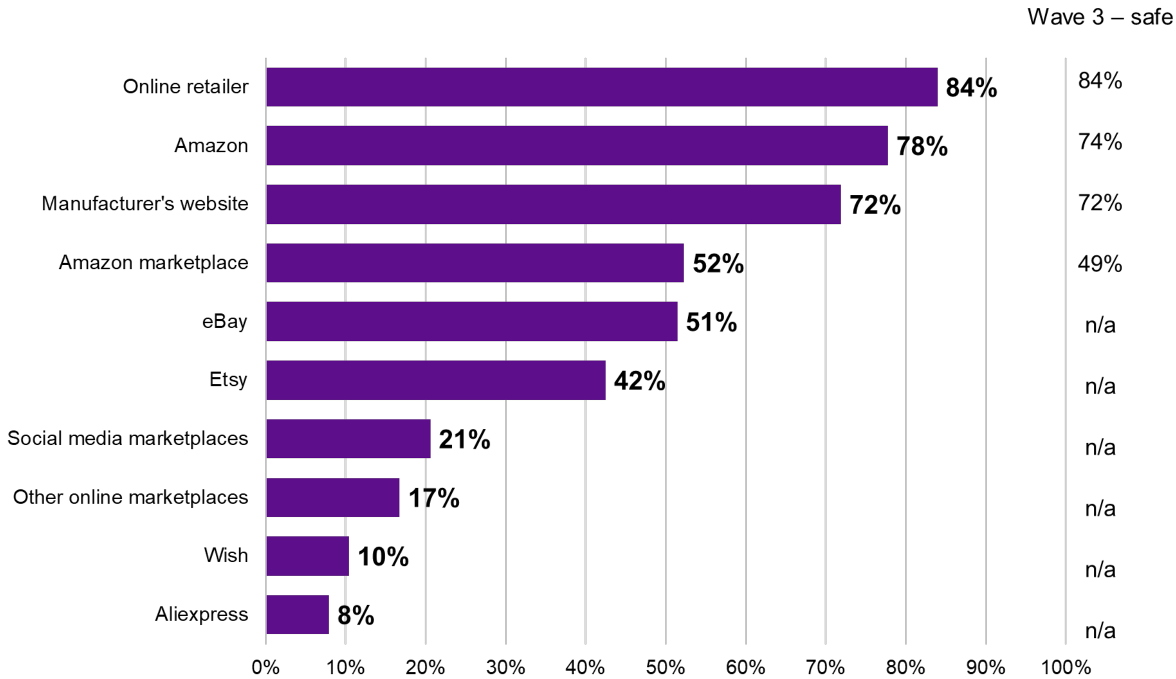
Perceptions around safety when purchasing online

Most of the UK public continue to feel that products bought from online retailers, marketplaces, and manufacturers are seen as safe. The list of online environments shown to respondents was changed in wave four so changes should only be taken as illustrative but broadly findings are consistent with previous waves. Products bought from online retailers are most likely to be seen as safe (84%), followed by products bought from manufacturer websites (72%).

In wave four, women are more likely than men to see products from online retailers as safe (86% vs 82%). Men are more likely than women to think products from Amazon marketplace (54% vs 51%) are safe, while women prefer social media marketplaces (23% vs 18%) or other online marketplaces (18% vs 15%).

There is a downward trend by age for thinking online marketplaces are safe, but there is also a downward trend by age for thinking online marketplaces are unsafe. The main trend by age is that older respondents are more unsure – 21% of 18 to 29 year olds are unsure of the safety of products bought via a social media marketplace, 30% think they are safe, 49% think they are unsafe. Comparatively, 57% of those aged 65 and over are unsure of the safety of products from a social media marketplace, 19% think they are safe, and 28% think they are unsafe.

Figure 8. Perceptions of products from different online environments being safe

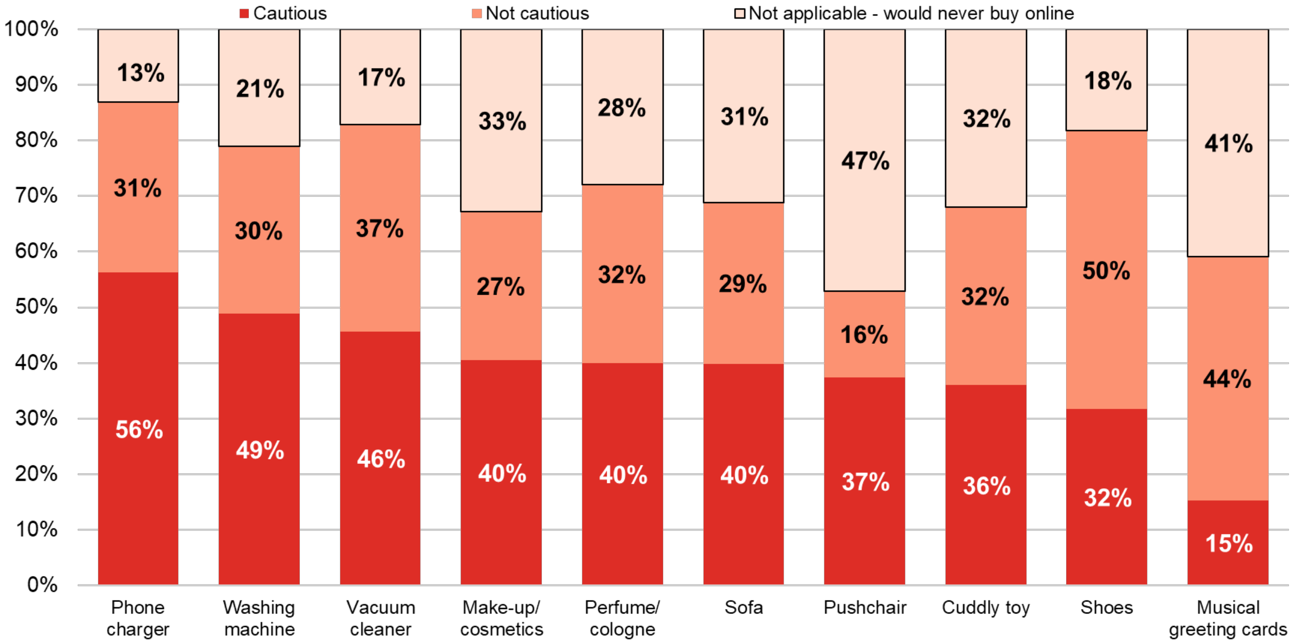


Q: Generally when purchasing products online from online marketplaces or direct from individual company websites how safe or not do you think the products you purchase are? *Note: list of options shown to respondents was changed in wave four
Base: All respondents in online section (5,067)

The varying perceptions of product safety when buying products online were interrogated in more detail by evaluating how cautious people would feel about the safety of specific products if they bought them online. Of the products listed, people are most cautious about the safety of a phone charger bought online (56%), followed by washing machines (49%) and vacuum cleaners (46%). Only one in seven would be cautious about the safety of a musical greeting card bought online (15%).

Women are more likely than men to say they would be cautious about the safety of each product, but there are no clear trends by age. Those with high education levels tend to be more likely than those with lower education levels to say they would not be cautious about each product, with the exception of a pushchair where the levels of caution are consistent (cautious: 37% low, 37% medium, 39% high).

Figure 9. Caution about safety of product purchased online



Q: How cautious or not, would you feel about the safety of the following products if you were purchasing them online?
Base: All respondents in online section (5,067)

Purchasing products online

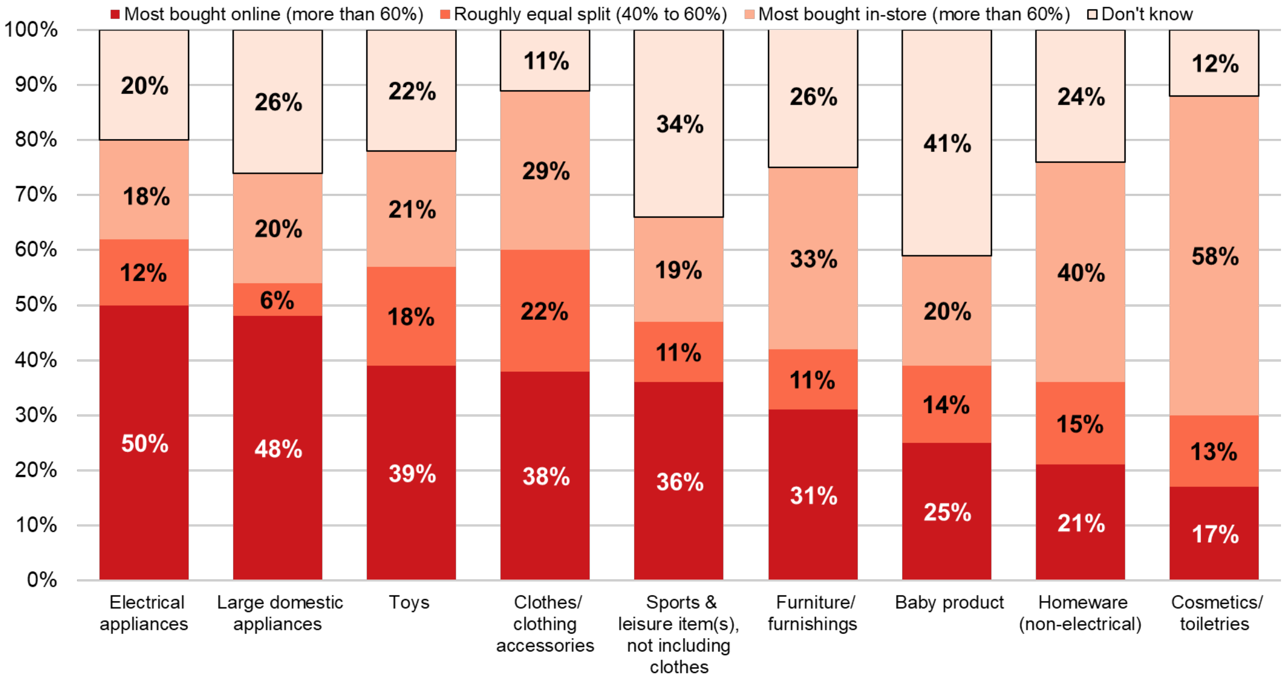
In wave four, respondents were asked to estimate what proportion of products in the last six months they had purchased online or in-store. Half of those who purchased electrical appliances (50%) or large domestic appliances (48%) said they usually purchase these items online. By contrast, less than a quarter who bought non-electrical homeware (21%) or cosmetics (17%) said the same. For these product categories, most said they purchased the majority of their items in-store (40% homeware, 58% cosmetics). People are more split when thinking about the furniture they purchased in the past six months – 31% said they purchased the majority online while 33% said they purchased most in-store.

There tends to be an upward trend by age with older respondents more likely to purchase the majority of their items in-store. A quarter of those aged 65 and over made most of their recent their electrical appliance purchases offline (26%) compared to less than a fifth of those aged 18 to 29 (15%) and over half of those aged 65 and over purchased the majority of their furniture in-store (53%) compared to only a fifth of younger respondents (22%).

Women are more likely than men to make purchases online – half said most of their recent large domestic appliances were purchased online (53% vs 44% men), 41% said most of their recent clothing purchases were made online (33% of men) and a fifth said most of their recent cosmetic purchases were online (20% vs 14% of men).

Those from higher education levels tend to be more likely than those from lower education levels to purchase the majority of their items online – 41% said the majority of their clothing purchases in the last six months had been online, 38% with medium education and 34% with low education levels.

Figure 10. Proportion of items bought in the last six months bought online or in-store

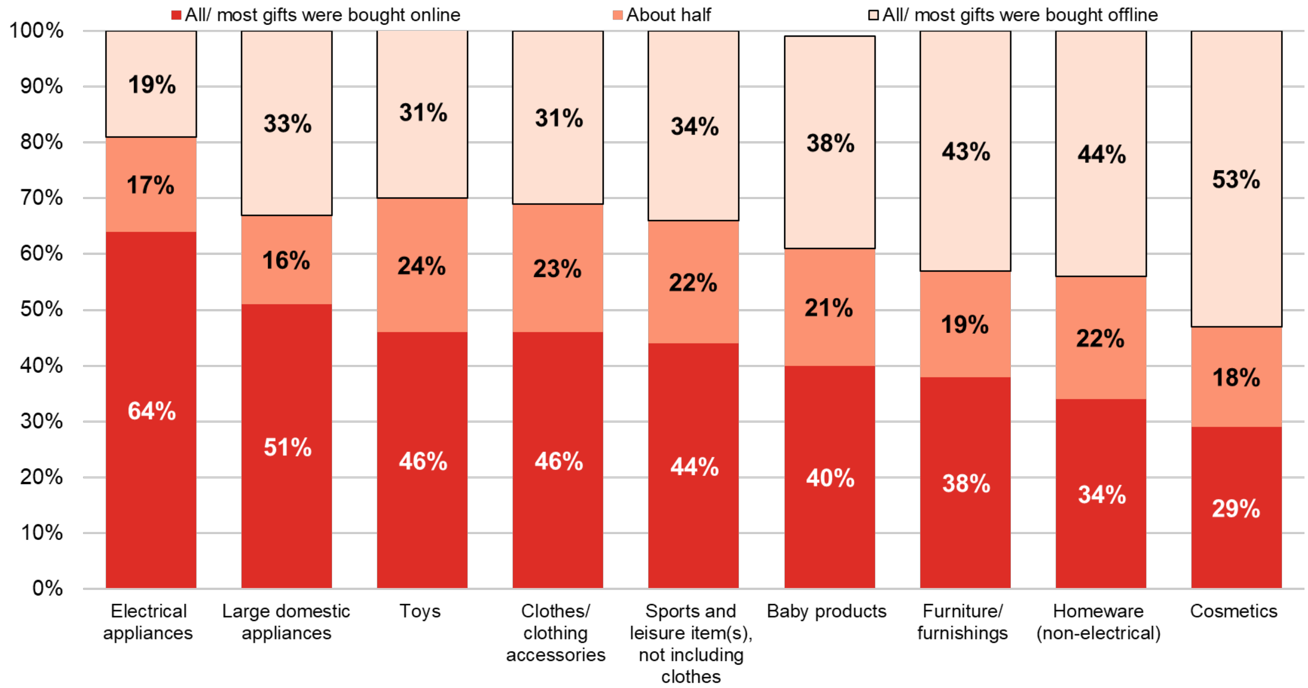


Q: Approximately, what percentage of the following products have you purchased online in the past 6 months (incl. click+collect) and in-store?
Base: All in online section who purchased this category in the last six months: (electrical appliances=4,028; large domestic appliances=2,141; toys=2,432; clothes/ clothing accessories=7,163; sports and leisure items=1,668; furniture/ furnishings=2,378; baby products=1,132; homeware (non-electrical)=2,816; cosmetics=7,893)

Those with a disability who purchased each product category tend to be more likely than those without a disability to say they bought the majority online – 52% bought most of their electrical appliances online (vs 49% without a disability)

Similar patterns are seen when asking about gift purchases specifically – the intent of the purchase as a gift or personal use appears to have no impact on the purchase method. Online purchases are more common for those who purchased electrical items (64% mostly online) or large domestic appliances (51%) as gifts, while purchases are made offline for gifts of homeware (44% mostly offline offline) or cosmetics (53%).

Figure 11. Proportion of gifts in the last year bought online or in-store



Q: Approximately, what percentage of the following products have you purchased online in the past 6 months (incl. click+collect) and in-store?
Base: All in online section who purchased this category as a gift in the last year (electrical appliances=1,224; large domestic appliances=696; toys=1,866; clothes/ clothing accessories=2,607; sports and leisure items=752; furniture/ furnishings=690; baby products=696; homeware (non-electrical)=1,149; cosmetics=2,288)

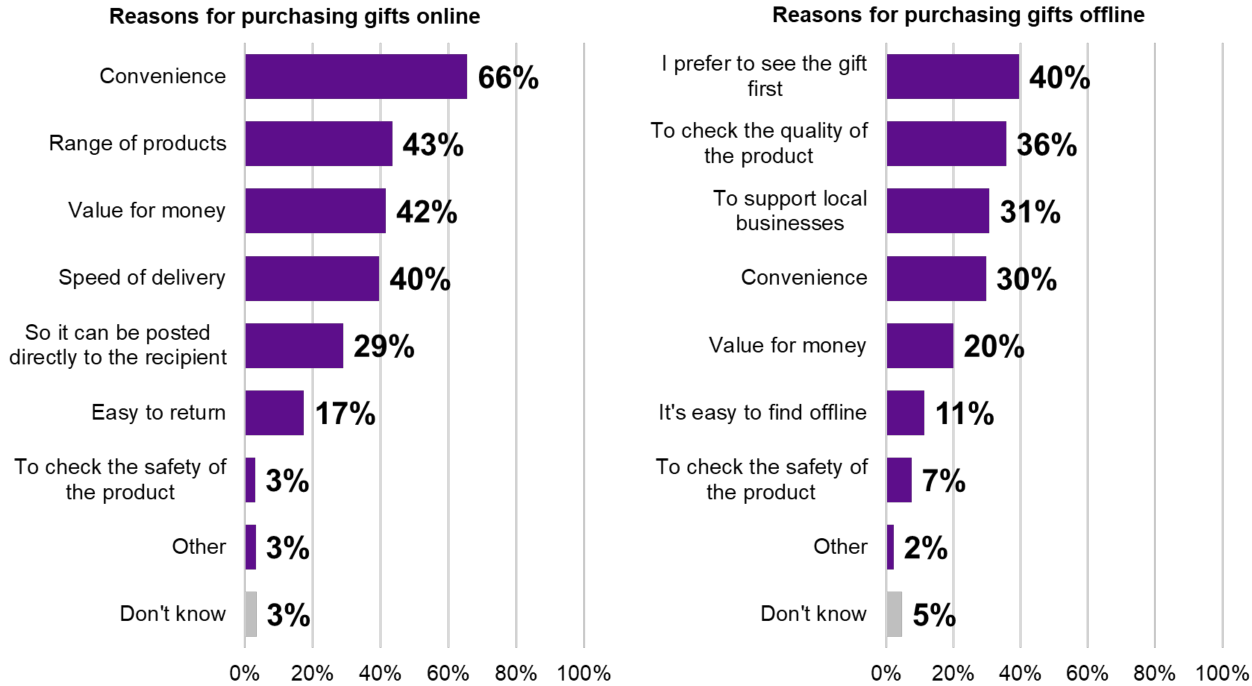
Respondents who had purchased a gift in the last year were asked their rationale for doing so online or offline. Convenience is the most popular reason for buying gifts online with two-thirds (66%) stating this was part of their decision. Around two-fifths gave a related reason such as a range of products available (43%), the item being value for money (42%), or fast delivery (40%). Only a very small minority said they did so to check the safety of the product (3%). With offline gift purchases, convenience and value for money are less of a priority (30%, 20% respectively). Instead, wanting to see the gift (40%) or check the quality (36%) are the most popular answers. Checking the safety of the product is more of a concern for offline shoppers than online but it was still only a small minority who said safety was a factor (7%).

Men are more likely than women to have considered product safety regardless of whether they have purchased the gift online (9% men vs 6% women) or offline (4% vs 2%). Women are more likely than men to cite checking the quality of the gift as a reason for offline purchases (38% vs 33%).

Respondents from an ethnic minority background are more likely than white respondents to cite product safety as a rationale for buying their gifts online/ offline – 13% said this was a reason for buying offline (vs 7% of white respondents), 6% said it was a reason for buying online (vs 3% of white respondents).

Those with a disability are also more likely to cite product safety as a reason for an online/ offline purchase – 11% said this was a reason for buying offline (vs 6% of respondents without a disability) and 5% said it was a reason for buying online (vs 2% of respondents without a disability).

Figure 12. Reasons for purchasing gifts online or instore



Q: You said that, over the last year, you bought some gifts online. Which, if any, of the following are reasons you buy gifts [online/ offline]?
Base: All who purchased a gift [in online section]: (purchased a gift online=3,121; purchased a gift offline=3,030)

Buying and selling products on an online marketplace

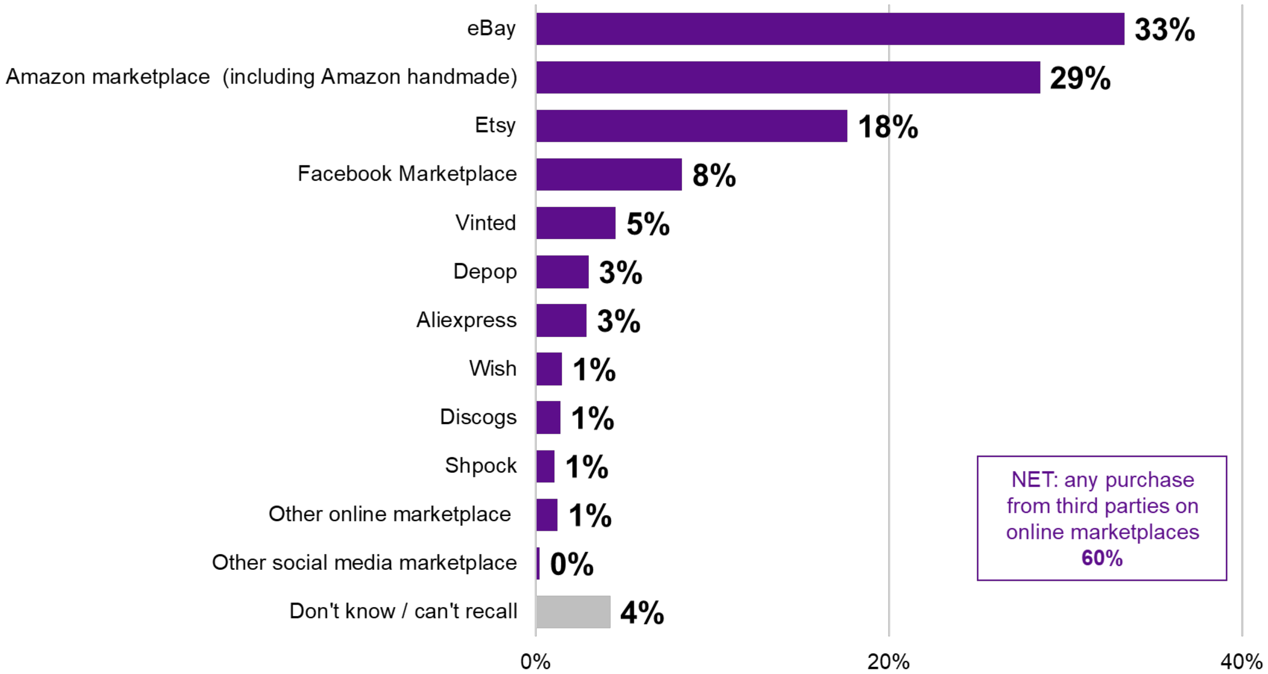
Overall, six in ten have purchased something from a third party on an online marketplace in the last six months (60%). The most popular online marketplace is eBay (33%), followed by Amazon marketplace (29%) and Etsy (18%).

There is broadly a downward trend by age for purchases via third party sellers on online marketplaces with a marked drop-off for those aged 65 and over – 65% of those aged 18 to 29 have done so, 64% of those aged 30 to 49, 60% of those aged 50 to 64 and only 49% of those aged 65+. For which online marketplaces are used – the top three marketplaces are consistent across age, although older respondents prefer Amazon marketplace (31% 65+ vs 23% 18 to 29).

There is no difference in overall use of online marketplaces by social grade – 61% of respondence with ABC1 grade have purchased from a third party seller on an online marketplace in the last six months, 58% of respondents in C2DE grade have done so. However, those in ABC1 are more likely than C2DE to have used Etsy (20% vs 14%) or Depop (4% vs 2%).

LGB+ respondents are more likely than heterosexual respondents to have bought something from a third party seller on an online marketplace in the last six months (65% vs 59%)

Figure 13. Online marketplaces purchased from in the last six months



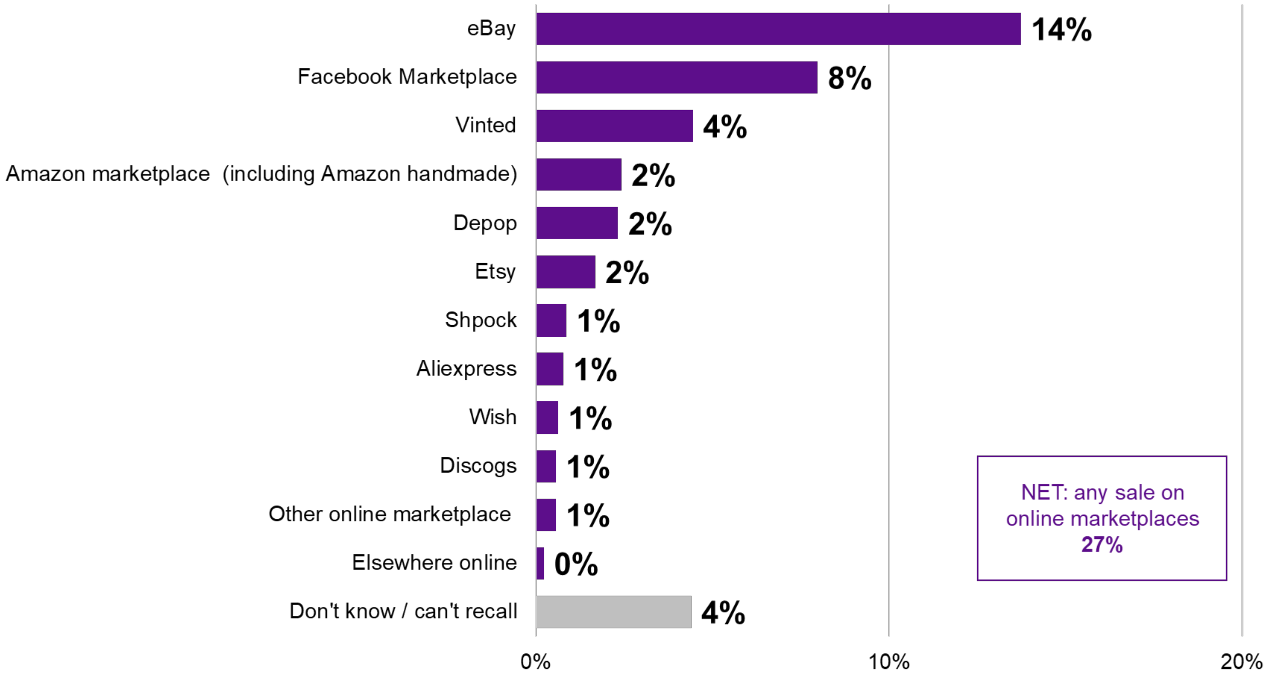
Q: Have you purchased any products from third parties selling on the following platforms in the past 6 months?
Base: All respondents [in online section] (5,067)

By comparison, relatively few have actually sold items on online marketplaces themselves – a quarter (27%) report having done so in the last six months. eBay remains the most common platform to use (14%), but here it is followed by Facebook Marketplace (8%) and Vinted (4%). Those who have shopped on marketplaces may also be third party sellers – 38% of those who have purchased something from an online marketplace in the last six months have also sold an item on a marketplace in the last six months.

Consistent with purchasing on online marketplaces, there is also a downward trend by age for selling products via marketplaces (39% 18 to 29, 33% 30 to 49, 22% 50 to 64, 13% 65+). There is also no variation across social grade.

Respondents from an ethnic minority background are more likely than white respondents to have sold an item on an online marketplace in the last six months (34% vs 26%).

Figure 14. Online marketplaces sold on in the last six months



Q: In the past 6 months, have you sold an item on the following online platforms?
Base: All respondents [in online section] (n=5067)

The majority of people who are selling products on online marketplaces are selling second-hand items (78%). Just under a quarter sold items which were new (23%) and 5% sold on behalf of a business they own or work for. Those who sold a product on Facebook Marketplace are the most likely to say their products were second-hand (89%) while those who sell on Etsy are the most likely to say their items were new (46%).

When purchasing items from third party sellers on online marketplaces, people tend to use a web browser (41%), although a quarter use the marketplace's app (27%) and the same proportion say they use apps and browsers equally (27%). Men are more likely than women to use a browser (46% vs 37%), while women are more likely to use an app (29% vs 24%). Older respondents are more likely to use a browser (56% 65+, 34% 18 to 29), while younger respondents use the marketplace's app (32% 18 to 29, 12% 65+).

A focus on labelling

In wave four, questions on perceptions of safety were shown to approximately half of all respondents, allocated randomly (n=5,089). Exact base sizes for specific questions are shown below each chart.

Key findings

- Overall reported awareness of conformity assessment marks relevant to different product types has declined, with increasing proportions reporting that they do not know what marks they would look for or that they would not look for any when purchasing a particular product.
- When purchasing electrical equipment, two in five (36%) report looking for a CE mark. This is also the case when thinking about purchasing large domestic appliances (33%), although both products have seen a decline compared to the previous wave of tracking.
- Comparatively, when purchasing baby products or toys, close to one quarter report looking for the Age Warning Logo (28% and 24% respectively).
- Just under two fifths (36%) 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, a ten-percentage point decline compared to wave two.
- Just under half (48%) of UK adults correctly identify the meaning of the Age Warning label, and slightly fewer (44%) correctly identify the meaning of the display label pursuant to Regulation 10 FFRs. Of those tested, these are the most recognised conformity assessment marks' definitions.
- The UKCA mark has low awareness, with less than one in ten reporting they would look for it across any of the products shown. In line with this lower identification, six in ten report that they do not know what the UKCA mark meant. That said, awareness of the definition is consistent with the last time this was asked (16%).
- Respondents were asked their preference to use a range of product labels. As seen in previous waves, the plurality would prefer to access safety information through a physical product / label (48%).
- Under one in ten (8%) 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) (3%). Both options are more popular among younger respondents.

- Participants in the qualitative research are concerned about product safety and how the products they purchase might be affected by lower product safety standards post-Brexit. The EU CE label was widely perceived to be a sign of trustworthiness and a sign of high-quality product standards.

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.

Figure 8. Conformity assessment mark summary

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.
	BSI kitemark	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

Overall, there is declining awareness of the conformity assessment marks when compared to wave two. Across all products the proportion of respondents reporting that they would look for none of the marks increases significantly. This decline is most evident for the BSI kitemark, where the proportion reporting they would look for it declines significantly across all product types, with the exception of toys.

As seen when these questions were last asked in wave two, there is a relatively large level of uncertainty surrounding conformity assessment marks across all product types, with close to a quarter of adults reporting that they did not know what mark they would look for when purchasing a product. This uncertainty has also increased for all products, with the exceptions of baby products.

Figure 5. Conformity assessment marks looked for on products[5]

	Electrical appliances	Baby products	Toys	Large domestic appliances	Furniture / furnishings
CE mark	36% (W2 40%) -	24% (W2 26%) -	26% (W2 29%) -	33% (W2 37%) -	22% (W2 24%)
UKCA mark	8% (W2 8%)	6% (W2 5%)	5% (W2 5%)	8% (W2 9%)	7% (W2 8%)
Age Warning Logo	5% (W2 5%)	28% (W2 33%) -	25% (W2 34%) -	4% (W2 3%)	4% (W2 4%)
BSI Kitemark	33% (W2 37%) -	23% (W2 26%) -	19% (W2 20%)	31% (W2 37%) -	24% (W2 27%) -
Lion Mark	3% (W2 3%)	11% (W2 13%) -	16% (W2 22%) -	4% (W2 3%)	4% (W2 3%)
Radio Equipment Pictogram	5% (W2 6%)	4% (W2 5%) -	6% (W2 8%) -	5% (W2 5%)	4% (W2 4%)
Display label pursuant to Regulation 10 FFRs	9% (W2 9%)	12% (W2 15%) -	8% (W2 9%)	9% (W2 8%)	36% (W2 46%) -
None of these	17% (W2 13%) +	18% (W2 13%) +	18% (W2 13%) +	17% (W2 13%) +	18% (W2 13%) +
Don't know	29% (W2 27%) +	30% (W2 29%) +	20% (W2 27%) +	31% (W2 29%) +	25% (W2 27%) +

Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

When purchasing electrical appliances, a little over a third look for either the CE mark (36%) or the BSI kitemark (33%), this represents a decline compared to wave two for both

[5] Wave on wave significant differences have been signified using coloured text and plus and minus signs. Red text and a minus sign identifies a significant decline, green text and a plus sign identifies a significant increase

of these marks. 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 just under half (47%). Similar to wave two, the CE mark (33%) and the BSI kitemark (31%) are the most commonly identified marks when thinking about purchasing large domestic appliances.

A little under three in ten (28%) of UK adults report they would look for the Age Warning Logo when purchasing baby products, again representing a significant decline compared to wave two (33%). However, those with children in their household do show increased awareness, 30% report that they would look for this mark, compared to 27% of those without children. The overall declining awareness of this conformity assessment mark is evident across all groups, those with children in their household see a decline of five percentage points compared to wave two (30% vs. 35% respectively). Those with children under 5 are more likely to cite the baby with a line label (33%) compared to those with children aged 6 to 15 (28%).

A similar proportion (25%) would look for the Age Warning Logo when purchasing toys. However, unlike baby products, the proportion identifying this mark increases significantly when looking at those with children in their household (30%) compared to those with none (24%). As with baby products, the declining awareness is evident in both of these groups compared to wave two, where two fifths (40%) of those with children, and a third (32%) of those without children in their household would look for this mark. One sixth (16%) report that they would look for the Lion Mark when purchasing toys, unlike the age warning logo there is no difference when comparing those with or without children in their households.

Slightly over a third (36%) of UK adults identify the display label as a mark they would look for when purchasing furniture/furnishings, representing a ten-percentage point decrease compared to wave two. As seen with the other conformity assessment marks, this declining trend is evident across most demographic subgroups. While both men and women see a decline compared to wave two it remains that women are more likely to identify this label compared to men (39% vs. 33% respectively).

As in wave two, younger respondents (aged 18 to 29) are most likely to report that they wouldn’t look for any mark when making a purchase (24% electrical appliances; 24% large domestic appliances ; 24% furniture/furnishings; 23% baby products; 23% toys). This also represents an increase in the proportion of this age group reporting this compared to wave two.

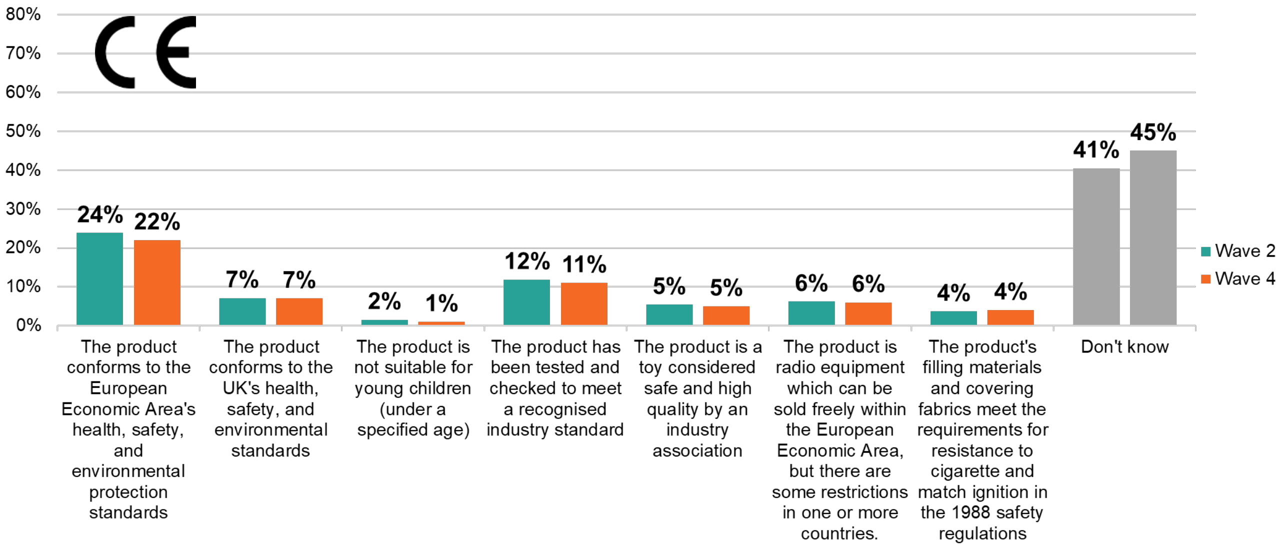
Survey respondents were asked to match the kitemark to a definition of its meaning. Some signs are more recognisable and descriptive than others e.g., the Age Warning Logo which includes an image of a child, in comparison to the lion symbol. Similar to wave two, the CE mark and fire protection were most commonly recognised across audiences.

Despite being frequently identified by respondents as a mark they would look for when making a purchase, only a fifth (22%) identified that the CE Mark means the product conforms to the European Economic Area's health, safety, and environmental protection standards, representing a slight decline compared to wave two. Comparatively, the proportion reporting that they don’t know increased to 45%.

Men are most likely to identify the CE mark definition (25%), compared to a fifth of women (18%), with women reporting a small but statistically significant decline in correct identification compared to wave two (21%). Three in ten (29%) of those with high educational achievement correctly identify the CE mark, higher than those with medium (21%) and low (14%) attainment.

Identification is fairly consistent wave on wave across the age groups, with the exception of those aged 30 to 49: one fifth (21%) correctly identified the definition, representing a significant decline in awareness compared to wave two (24%).

Figure 16. Definition of CE mark



Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

The CE mark was seen as a trustworthy, comforting part of product packaging by qualitative focus group participants. For many participants, the CE mark was a long-standing label that helped to reassure them that the product they were purchasing had high product quality standards.

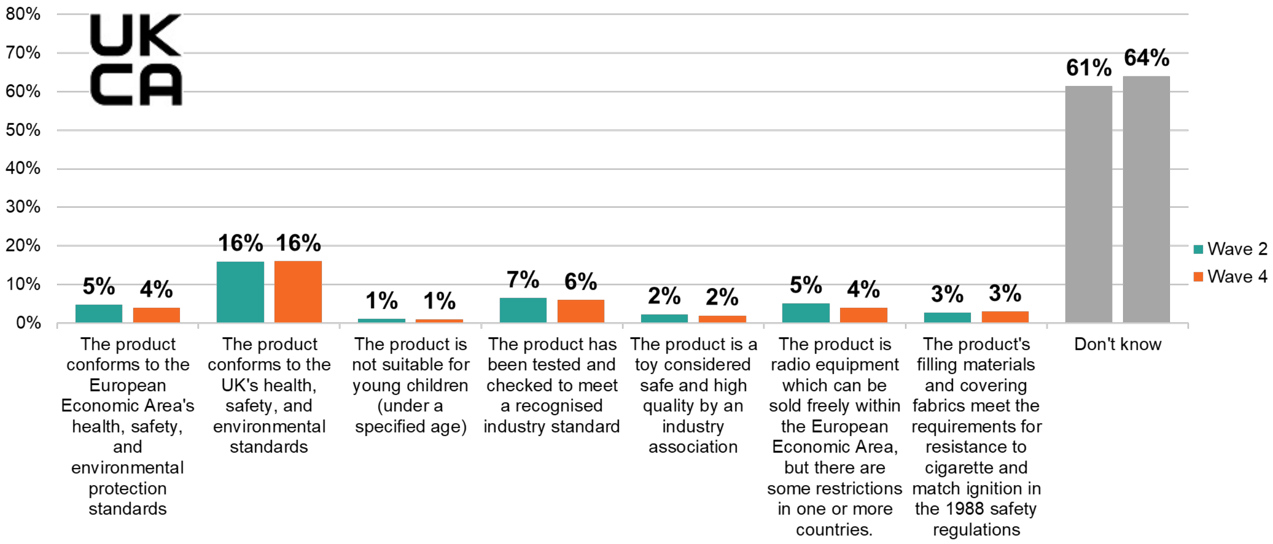
"It is an established certificate that has been around for a long time, and to be honest not heard any bad news about." Parent w/children under 18, higher socio economic group (ABC1)

"I would buy it because it has been tested and passed European safety checks." Parent w/children under 18, lower socio economic group C2DE

"It's well-known (due to longevity) and well trusted as a widespread mark of quality/regulation." 18-40-year-old, C2DE

One sixth (16%) of respondents identified that the UKCA mark meant that the product conforms to the UK's health, safety, and environmental standards, consistent with the previous wave of tracking. As with the CE mark, men are more likely to correctly identify the definition compared to women (18% vs. 14% respectively). Unlike the CE mark, those aged 18 to 29 are most likely to correctly identify this definition (20%) with awareness decreasing as respondents' age increases (17% 30 to 49; 15% 50 to 64; 12% 65+). All are consistent compared to wave two.

Figure 17. Definition of UKCA mark



Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

Nearly two thirds report they don't know what the UKCA mark meant. In line with their decreased identification of the definition, women are more likely to state that they don't know compared to men (65% vs. 62% respectively). This is also significantly higher among white respondents (65%), compared to ethnic minority respondents (55%), however, this is not due to a lack of identification of the correct definition among white respondents: both groups are equally likely to identify the definition (16% and 15% respectively), instead ethnic minority respondents are more likely to misattribute the definition.

Only a handful of participants in the qualitative focus groups recognised the UKCA label. Very few participants said they knew that product safety standards were due to change after Brexit. These participants also said they would hope for more information about additional changes to product safety standards in the news or on social media.

Many participants said they would like to get more information about the standards related to the labelling system to make purchasing decisions. On its own, the UKCA label does not mean a great deal, especially when compared with the EU's label which is well trusted due to its ubiquity and longevity on products.

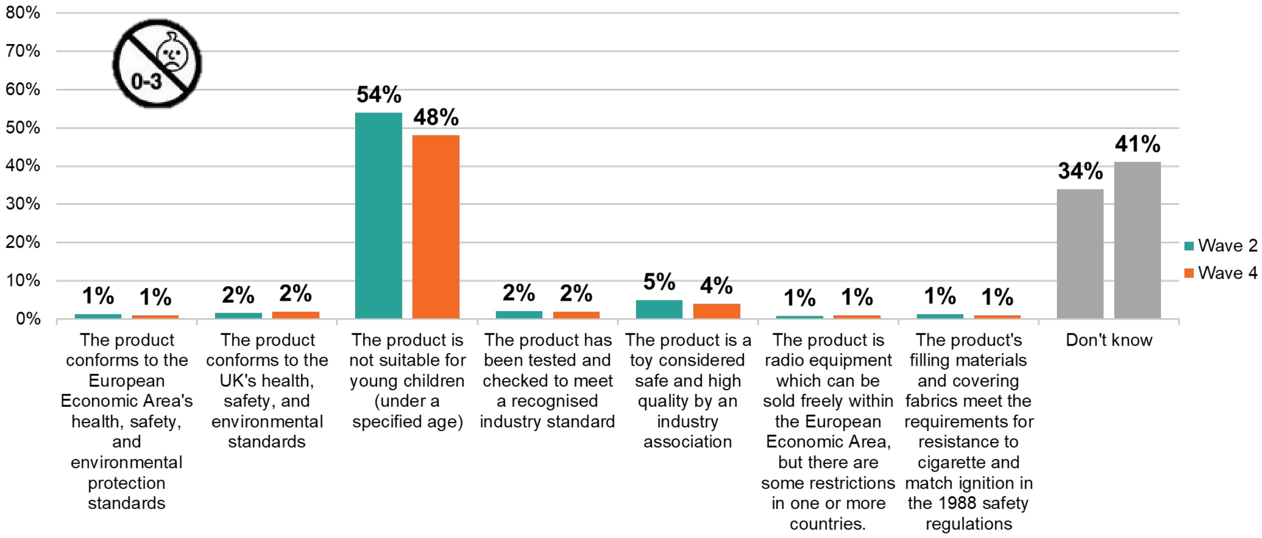
"Until I see the symbol on a lot of products, I wouldn't trust it." Parent w/children under 18, ABC1

"I feel like it should have been better communicated to the public when it changed." 18-40-year-old, C2DE

"I should properly know it, but I didn't even know it had changed from CE."
18-40-year-old, C2DE

Corresponding with the decreased proportions reporting that they would look for the Age Warning Logo when buying toys and baby products, there is also a decline in correct identification of the definition. A little under half (48%) correctly identify that the Age Warning Logo 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, this represents a significant decline compared to wave two (54%). There is also a corresponding increase in the proportion reporting that they don't know (34% to 41%).

Figure 98. Definition of Age Warning Logo



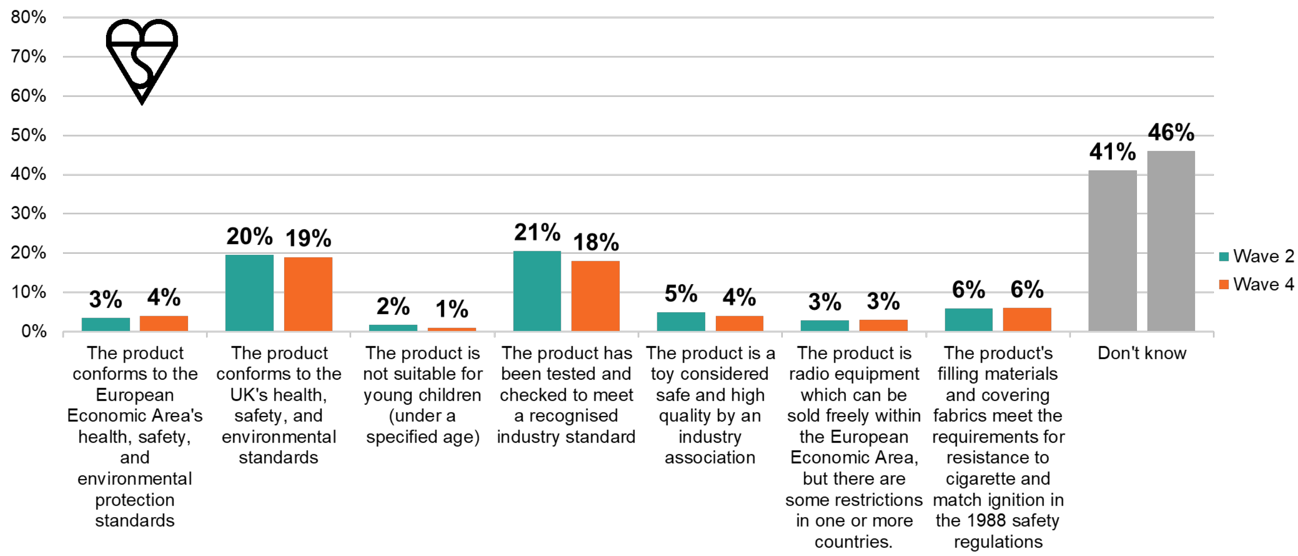
Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

As seen last wave, there is no difference in awareness regardless of whether the respondents have a child in their household or not (both 49%), with both groups reporting a decline in correct identification compared to wave two (54% of those who have children in their household; 55% of those who do not).

Unlike the CE and the UKCA marks, women are more likely to correctly identify the definition compared to men, however both groups' identification declined compared to wave two (58% to 52% women; 50% to 45% men).

Less than a fifth (18%) of UK adults identify that the BSI Kitemark means that the product has been tested and checked to meet a recognised industry standard, again a slight decline on wave two which is evident across most groups.

Figure 19. Definition of BSI Kitemark

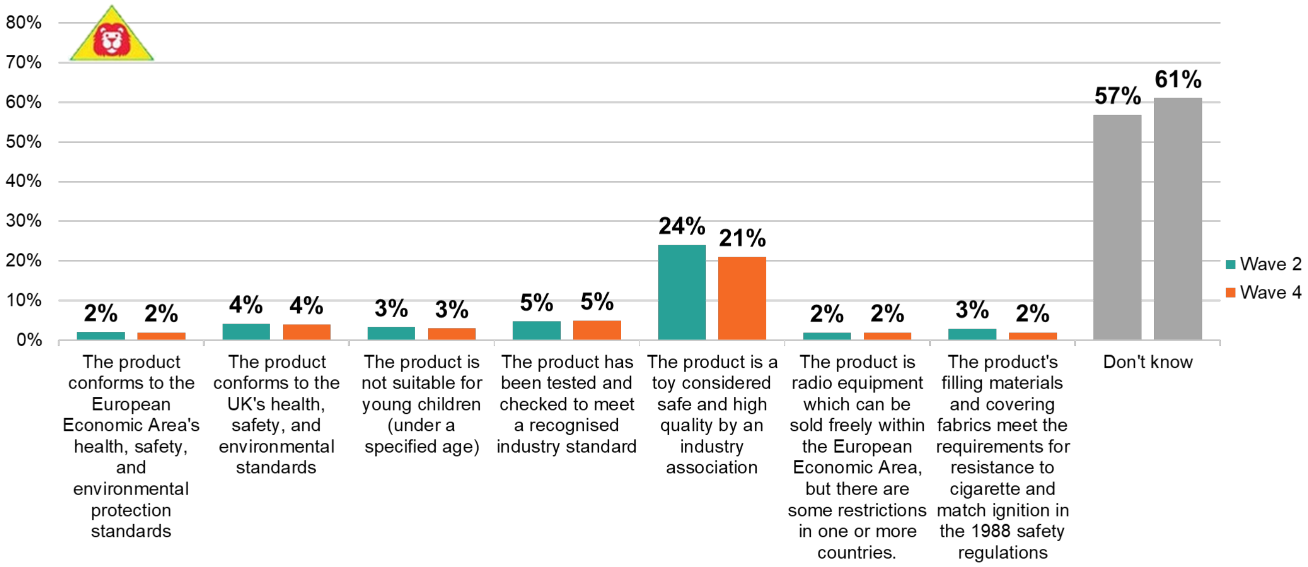


Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

Identification of the definition largely increases with age (12% 18 to 29; 17% 30 to 49; 22% 50 to 64; 20% 65+), this aligns with the previous question on whether respondents would look for this conformity assessment logo; those aged 18 to 29 are the least likely to state they would look for the BSI kitemark on any product.

One fifth (21%) identify that the Lion Mark means the product is a toy considered safe and high quality by an industry association, a slight decline compared to wave two. As with the age warning logo, likelihood to correctly identify the definition is consistent regardless of whether respondents have children in their household (both 21%). Interestingly this represents a change compared to wave two, whereas those with children in their household are slightly more likely to correctly identify the logo (26% vs. 23 of those without). Correct identification of the definition does not change depending on the age of the child in the household.

Figure 20. Definition of Lion Mark

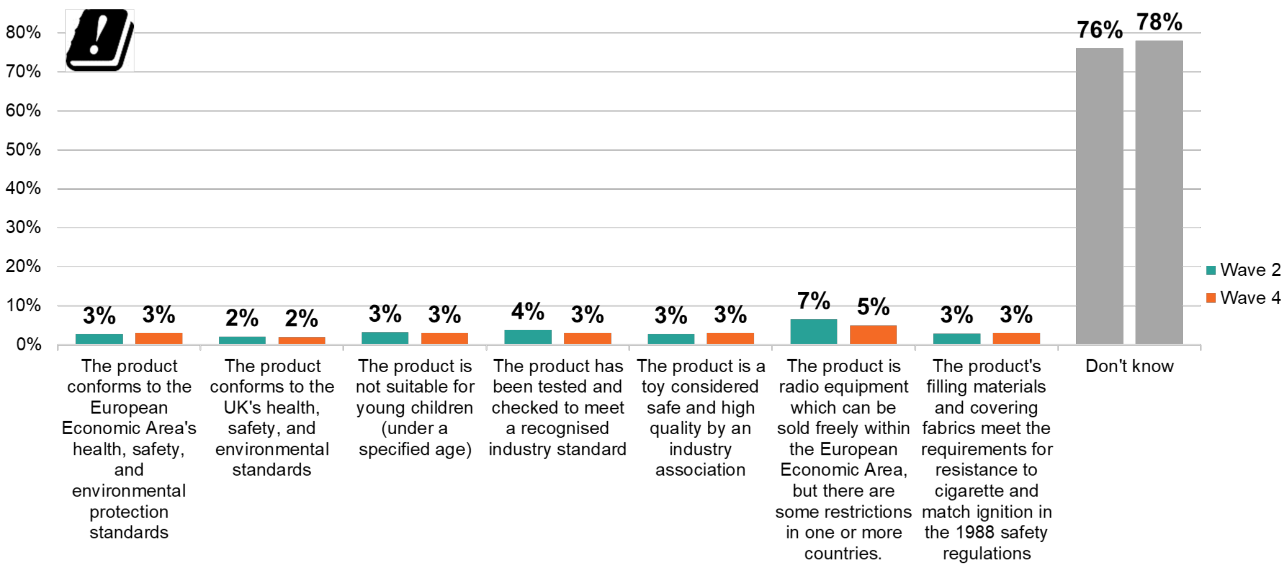


Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

Despite declines across most demographic groups, half (50%) who stated they would look for a Lion Mark when purchasing toys correctly identified its definition, consistent with wave two (53%).

The pictogram mark continues to be the least well known of the marks shown, with just one in twenty (5%) 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, nearly eight in ten (78%) report they do not know the definition.

Figure 2110. Definition of Radio Equipment Pictogram

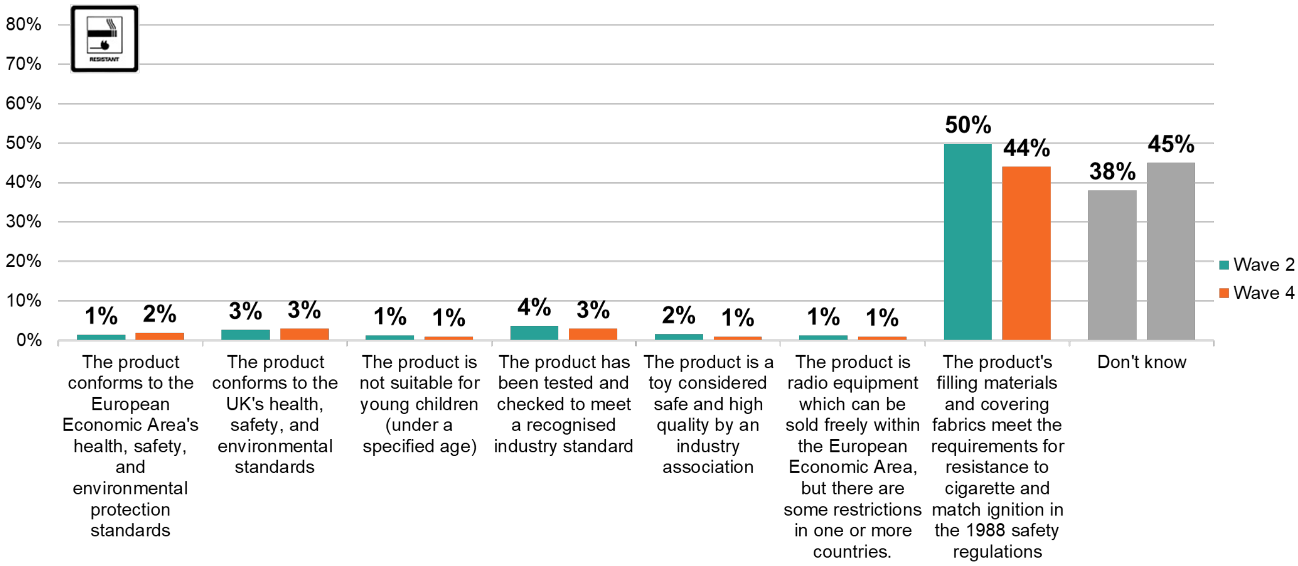


Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

Generally, knowledge of the definition was consistently low across audience groups, however, unlike the majority of other marks. In wave two those with a low educational attainment were significantly more likely to identify the definition compared to those of a high educational attainment (8% vs 6% respectively), however this is not the case for the current wave where identification across these two groups is consistent (4% and 5% respectively).

A little over two fifths (44%) 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 represents a significant decline compared to wave two (50%) which is evident across most groups.

Figure 22. Definition of Display label pursuant to Regulation 10 FFRs (Fire Resistance)



Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

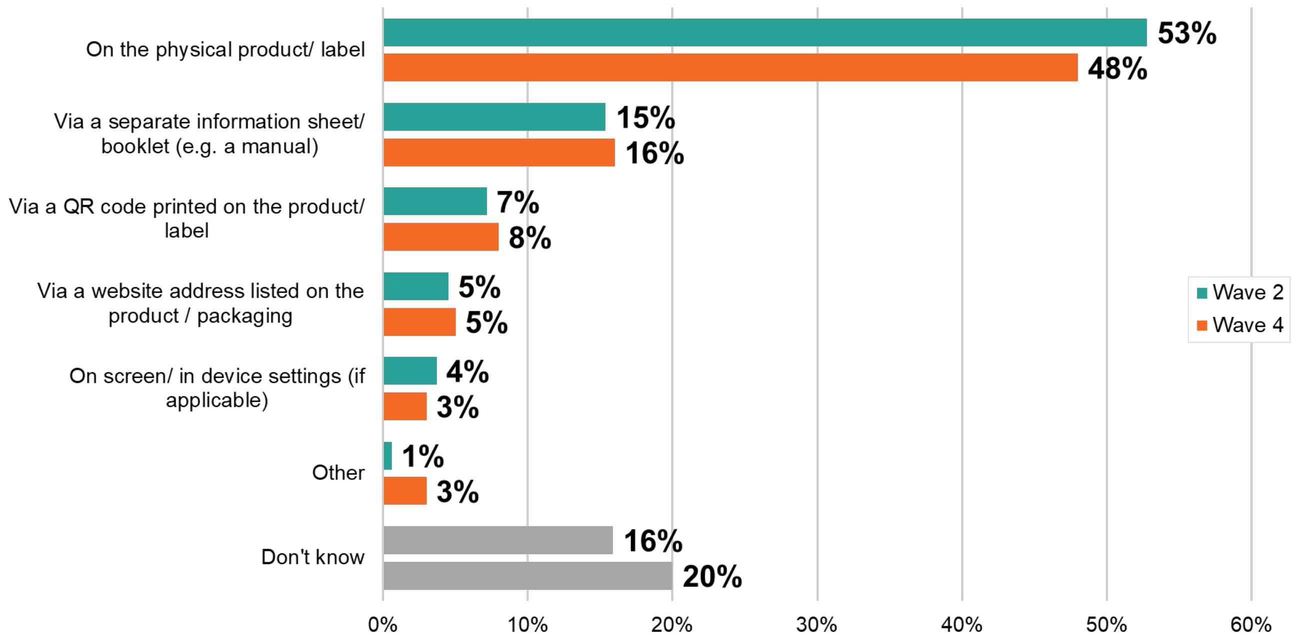
When looking at those who report that they would look for the display label when purchasing furniture and soft furnishings, correct identification of the definition increases significantly to just under three quarters (72%), a pattern which was also observed in wave two (71%).

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).

Labelling preferences

Respondents were asked how they would best like to access safety information for electrical appliances, baby products, toys, cosmetics, large domestic appliances, and furniture/furnishings. Overall, it appears that uncertainty around product labelling for safety information is growing, in line with declining awareness of the mark definitions and decreases in the proportion reporting they would look for certain conformity assessment marks, the proportion who report that that don't know how they would like to access safety information has grown to one fifth (20%) compared to one sixth (16%) in wave two. This increase in uncertainty is evident across most demographic groups.

Figure 23. Preference for labelling for safety information



Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W2=5,135; W4=5,089)

Despite this, accessing safety information through a physical product / label continues to be most commonly cited (48%), a decline on wave two (53%). Selection of this option is largely driven by those thinking about furniture/ furnishings (54%), which is significantly higher than electrical appliances (43%) and large domestic appliances goods (43%).

This is followed by a sixth reporting they would prefer to see the information through a separate information sheet/booklet (16%). Those who were asked to think about large domestic appliances and electrical appliances are more likely than any other group to state this (25% and 21% respectively), an increase for those thinking about large domestic appliances compared to wave two (21%). Comparatively, this sits at just over one in ten for all other products (12% toys; 11% cosmetics; 10% baby products; 14% furniture and furnishings).

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

As seen in wave two, those aged 18 to 29 are more likely than older respondents to prefer to find out via an on screen / in device setting (6% vs. 2% 50 to 64; 1% 65+) or via a QR code (11% vs. 6% 50 to 64; 4% 65+). In wave two, ethnic minority respondents were more likely to report having a preference for these methods compared to white respondents, however this is not the case for wave four, where selection of QR codes (7% white respondents; 10% ethnic minority respondents) and on screen/ in device settings (3% white respondents; 4% ethnic minority respondents) is fairly consistent.

Adults with a lower social grade (C2DE) are more likely to report that they don't know how they would like to access safety information compared to those of a higher social grade (ABC1) (22% vs. 18% respectively).

Those living with a disability are more likely to identify a separate information sheet / booklet (18%) compared to those without (15%).

Perceptions of product safety information

Generally, qualitative participants said they wanted more accessible information about product safety standards, especially with the shift away from CE labels. They would like this information in a variety of ways, from articles to social media, as well as government websites, retailers (online primarily) or product packaging. With such little public information available about the new product safety standards in the UK, participants said they were hoping for more information more frequently. More, or clearer, information from trusted organisations was also something that would give this audience reassurances that their products were safe.

Participants said they would like reassurances that product safety regulations will improve post-Brexit. Some said they were caught off-guard by the recent change in product safety labels and did not know how that might affect the integrity of the products they are buying. They were hoping for more publicly available information about these changes. With such important product-related purchasing decisions, participants needed to have the most up-to-date product safety information available.

"Government regulator or office/department and on the products themselves - too many have very little in the way of information at or after purchase (and it is the manufacturers' responsibility at the end of the day)." 18-40-year old, C2DE

"More public awareness about what the UK does in terms of safety standards is needed." 18-40-year-old, C2DE

"A UK-wide safety mark that is well known as the red tractor for meat [would be great]." 41+-year-old, C2DE

Experiences of safety issues

In wave four, questions on experiences of safety issues were initially shown to all respondents who had bought a product in the last 6 months (n=7,577), and then subsequently to those who experienced a safety issue (n=717). Exact base sizes for specific questions are shown below each chart.

Key findings

- Of respondents who bought a product within the last 6 months, 9% report experiencing a safety issue of some kind.
- Those who bought changing tables (27%), baby carriers (23%), and gas appliances (23%) are the most likely to have a safety issue.
- Issues with baby products are reported as the most serious by respondents (average severity of 5.8 out of 10).
- Distress and increased stress is the most common impact from a safety issue with a product (24%), with the exception of 'none of the above' (48%).
- Of those who experienced physical harm due to a safety issue, 32% needed no form of aid. While 22% required urgent medical attention and 20% needed first aid.
- Consistent with previous waves, the most common action taken by those who have a safety issue is to return/ refund the product (22%). This is followed by complaining to where the respondent bought it from (17%) and throwing it away but not returning and trying to fix it themselves (both 15%).

Seriousness of safety issues

Out of those who bought a product within the last 6 months, just under one out of ten (9%) experienced a safety issue of some kind. This is broadly comparable with previous waves. The most common products with which to have a safety issue, from the options provided, in wave four are within the baby products category, consistent with previous waves.

The top product to have a safety issue is a changing table (13% W1, 23% W2, 13% W3, 27% W4). This is followed by baby carriers (18% W1, 23% W2, 13% W3, 23% W4), and then gas appliances (23% W4) which was asked about for the first time in wave four. The most common product to have a safety issue with in previous waves was a baby monitor (9% W2, 16% W3, 21% W4). Despite there being an increase in the proportion of safety issues with a baby monitor from previous waves, this increase is not as substantial as other baby products.

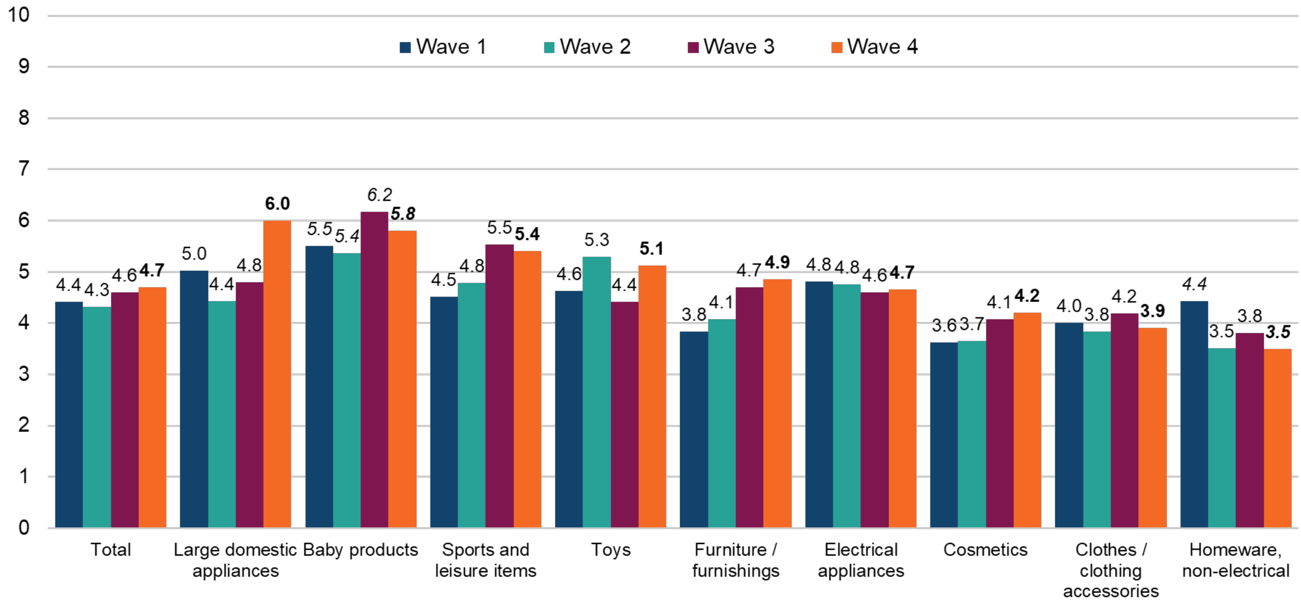
There has been no significant increase in the seriousness of safety issues, with wave four having a mean of 4.7 on a ten-point scale, compared to 4.6 in wave three and 4.3 in wave two. However, there is a decreasing trend in the percentage of those who said the issue was less serious, from 46% in wave two, to 40% in wave three and 37% in wave 4.

Safety issues with baby products are consistently considered to be more serious (5.8) than safety issues with most other products. However, in wave four the safety issues which were experienced with large domestic appliances considered more serious (6.0) than they were in previous waves (4.8 W3; 4.4 W2; 5.0 W1). It should be noted that in previous waves, this category was described as “white goods”, while in wave four the term was changed to “large domestic appliances”.

Respondents with children in their household were significantly less likely to consider their safety issue as not serious (31%), when compared to respondents without children in the household (41%).

They are also less likely to report any safety issues at all (89% no safety issues) compared to those without children in the household

Figure 24. Seriousness of safety issue with product



Q. Thinking about the safety issue you had with the following product: product …Please consider a scale of 1 to 10, where 1 represents the least serious type of issue you could face and 10 represents the most serious. What number best represents the seriousness of the issue?
Base: All who experienced a safety issue with a listed product: total (W1=591; W2=783; W3=721, W4=691), product asked about: baby products (W1=29[6]; W2=41[5];W3=36[5], W4=43[5]), toys (W1=61; W2=62; W3=68; W4=67), large domestic appliances (W1=50; W2=66; W3=56; W4=56), electrical appliances (W1=110; W2=120; W3=127; W4=104), cosmetics (W1=79; W2=122; W3=114; W4=115), sports and leisure items (W1=67; W2=90; W3=75; W4=57), furniture/ furnishings (W1=62; W2=90; W3=74; W4=69), homeware (W1=47[5]; W2=63; W3=55; W4=39[5]), clothes/ clothing accessories (W1=86; W2=129; W3=116; W4=141)

Impact of safety issues

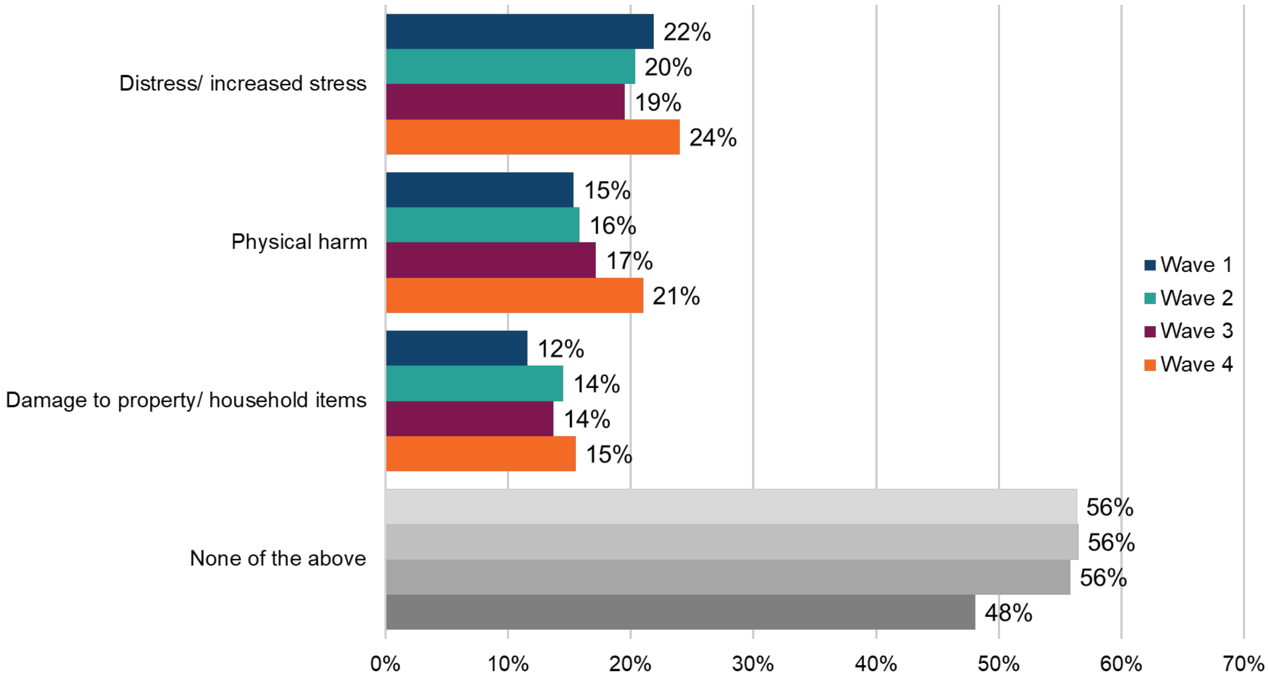
There is a significant reduction in the proportion of those who say their safety issue had no serious impacts in wave four (56% W1; 56% W2; 56% W3; 48% W4). The impact to increase the most in wave four is physical harm (15% W1; 16% W2; 17% W3; 21% W4), which is a significant increase from wave one and wave two and is demonstrating an

[6] Note: small base, treat with caution

upwards trend. This increase is driven by younger respondents (18 to 29 33%, 30 to 49 20%, 50 to 64 11%, 65+ 10%).

Both increased stress and damage to property as outcomes of the safety issue remain consistent with previous waves. Distress/increased stress is the most common outcome from the safety issue after none of the above, whereas in previous waves this has consistently been increased stress.

Figure 25. Effects of the safety issue



Q. You said you experienced a safety issue with the following product: product … Did that safety issue cause any of the following?
Base: All who experienced a safety issue with a listed product (W1=591, W2=783, W3=721; W4=691)

Of those who experienced physical harm due to a safety issue with a product, a third (32%) needed no form of aid. While 22% required urgent medical attention and 20% needed first aid.

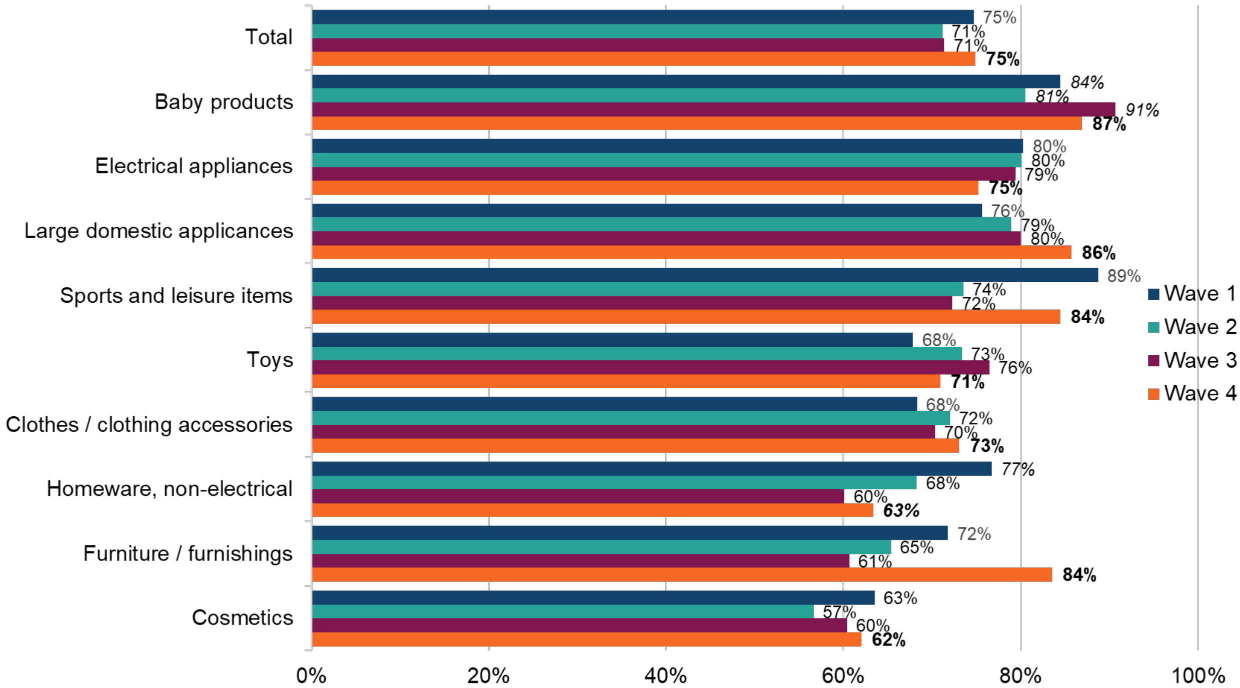
Out of those who experienced property damage due to a safety issue with a product, dents and/or scratches to property is the most common resulting issue (42%), which is consistent with wave three (41%). This was followed by electrical damage (35%) and flood damage (24%). A quarter (24%) of those who had a safety issue which resulted in property damage estimated the cost of the damage to be £1-£100.

Actions as a result of safety issues

Of those who experience a safety issue with a product, the majority (75%) report they took action in some form as a result of the safety issue. Issues with baby products (87%) or large domestic appliances (86%) are more likely to prompt an action of some kind, which is understandable as safety issues with these products were considered to be more serious. There has been a sharp rise in the proportion who take action as a result of a safety issue with furniture/ furnishings (84% W4; 61% W3) or sports and leisure items (84% W4; 72% W3).

Respondents with children in the household are significantly more likely to take an action (80%), than those without children in the household (71%). This is correlates to the fact that baby products are most likely to cause a safety issue.

Figure 26. 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 product? Base: All who experienced a safety issue with a listed product: total (W1=591; W2=783; W3=721, W4=691), product asked about: baby products (W1=29[7]; W2=41[6];W3=36[6], W4=43[6]), toys (W1=61; W2=62; W3=68; W4=67), large domestic appliances (W1=50; W2=66; W3=56; W4=56), electrical appliances (W1=110; W2=120; W3=127; W4=104), cosmetics (W1=79; W2=122; W3=114; W4=115), sports and leisure items (W1=67; W2=90; W3=75; W4=57), furniture/ furnishings (W1=62; W2=90; W3=74; W4=69), homeware (W1=47[6]; W2=63; W3=55; W4=39[6]), clothes/ clothing accessories (W1=86; W2=129; W3=116; W4=141)

Consistent with previous waves, the most common action taken by those who have a safety issue is to return/ refund the product (22%). This is followed by complaining to where the respondent bought it from (17%) and throwing it away but not returning and trying to fix it myself (both 15%).

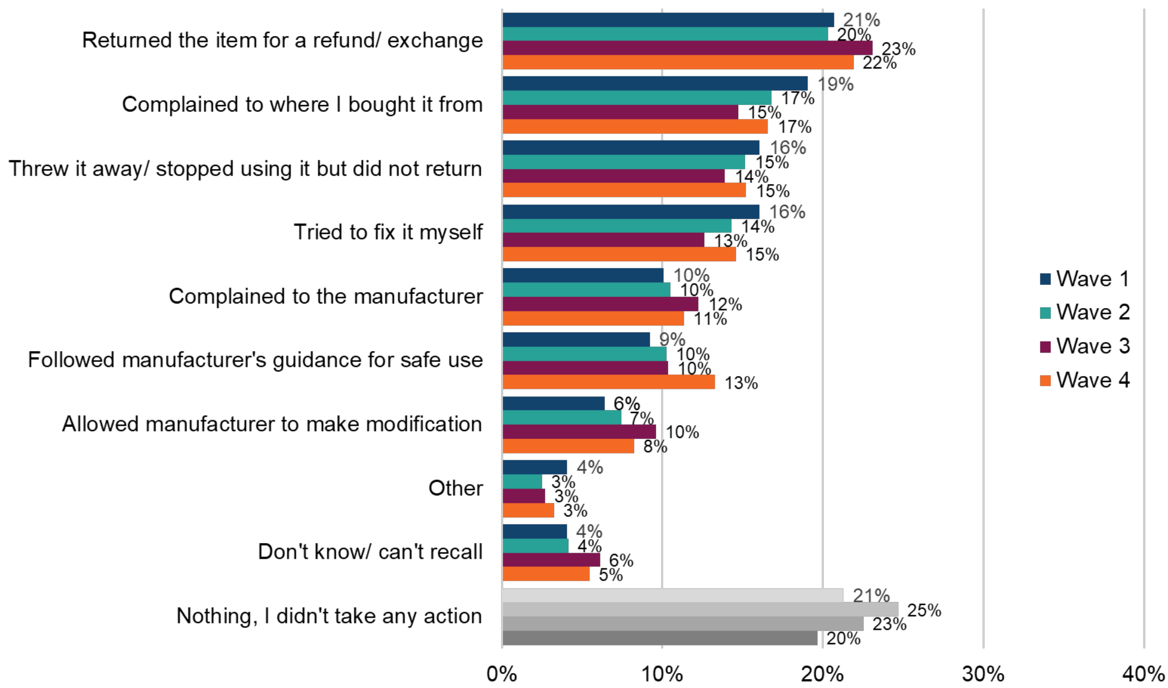
Those who had a safety issue with a large domestic appliance mostly complain to where they bought it from (32%) or follow manufacturer's guidance for safe use (31%). This latter action has seen a steady rise in the proportion taking this as a result of a safety issue with a large domestic appliance (31% W4; 24% W3; 15% W2; 9% W1). A third of those who had a safety issue with furniture complained to where they bought it from – double the proportion who took this action in wave three (32% vs 13%).

Men are twice as likely as women to try to fix the product themselves (20% men, 10% women), and those who are younger are also more likely to try fixing it themselves (18 to 29 20%, 30 to 49 15%, 50 to 64 7%, 65+ 10%). Older respondents (65+) are instead more likely to not take any action (32%), compared to younger respondents (18 to 29 16%, 30 to 49 17%, 50 to 64 19%). Those without caring responsibilities are also more likely to not

[7] Note: small base, treat with caution

take any action (22%), compared to those with caring responsibilities (12%); and the same is true for those with children in the household (14% took no action, compared to 24% of those with no children in the household).

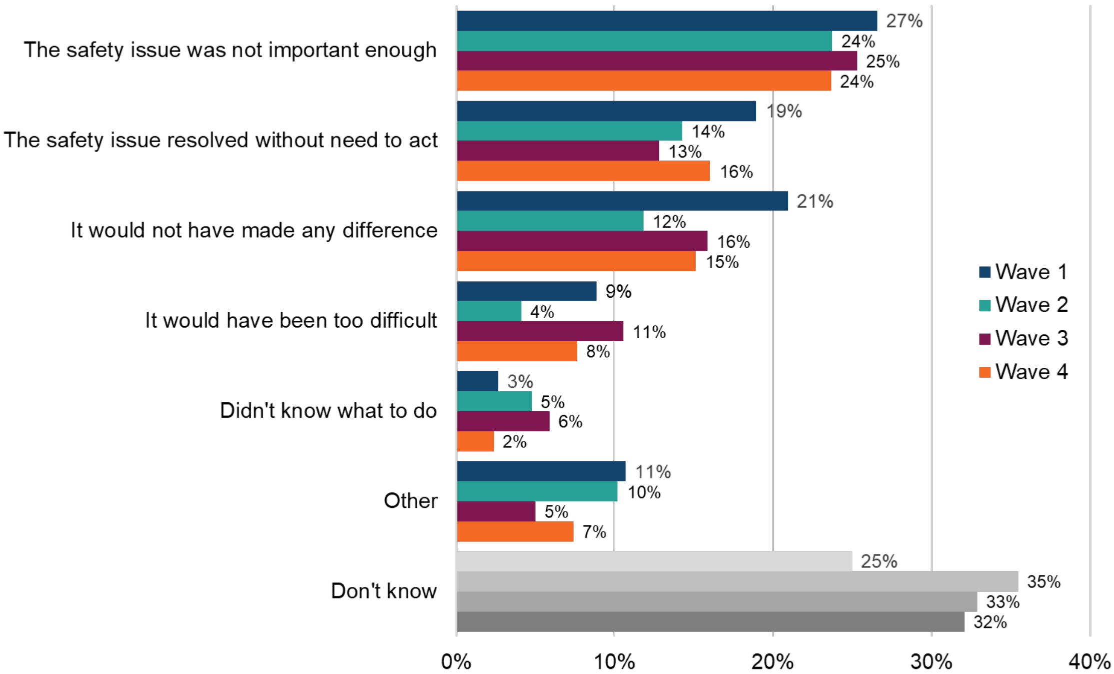
Figure 27. Actions taken as a result of product safety issue



Q. Which of the following actions did you take after becoming aware of the safety issue with the following product?
Base: All who experienced a safety issue with a listed product (W1=591; W2=783;W3=721; W4=691)

Out of those who took no action, the safety issue not being important enough is the most common reason for not taking action (27% W1; 24% W2; 25% W3; 24% W4). Also, 16% said they did not take any action because the issue resolved without the need to act, and 15% said that taking an action would not have made any difference.

Figure 28. Reasons no actions taken



Q. Which, if any, of the following best explain why you decided not to take any action?
Base: All who experienced a safety issue with a listed product, who didn't take action (W1=130; W2=197;W3=166; W4=142)

Perceptions and experiences of product registration

In wave four, questions on product registration were shown to all respondents (n=10,156). Exact base sizes for specific questions are shown below each chart.

Key findings

- The UK public is generally comfortable with automatic registration, so that the owner can be contacted in the event of a safety issue, either at the point of purchase (61%) or at the point of registration (62%).
- Previous waves noted that those with high education levels are less likely than low education levels to register an eligible product. Here, those with high education levels are more likely to feel comfortable with automatic registration than those with low education levels.

Comfort towards automatic registration

UK adults were presented with two variations on automatic registration – where their details and the model of the product would be provided to the manufacturer at either the point of registration or the point of installation, so that the owner could be contacted in the event of a safety issue. Broadly, the general public are comfortable with automatic registration, with six in ten saying they would be comfortable with each scenario (61% at point of purchase, 62% at point of installation). Those who are comfortable with one are generally comfortable with the other – 87% of those who are comfortable with automatic registration at purchase are also comfortable with automatic registration at the point of installation.

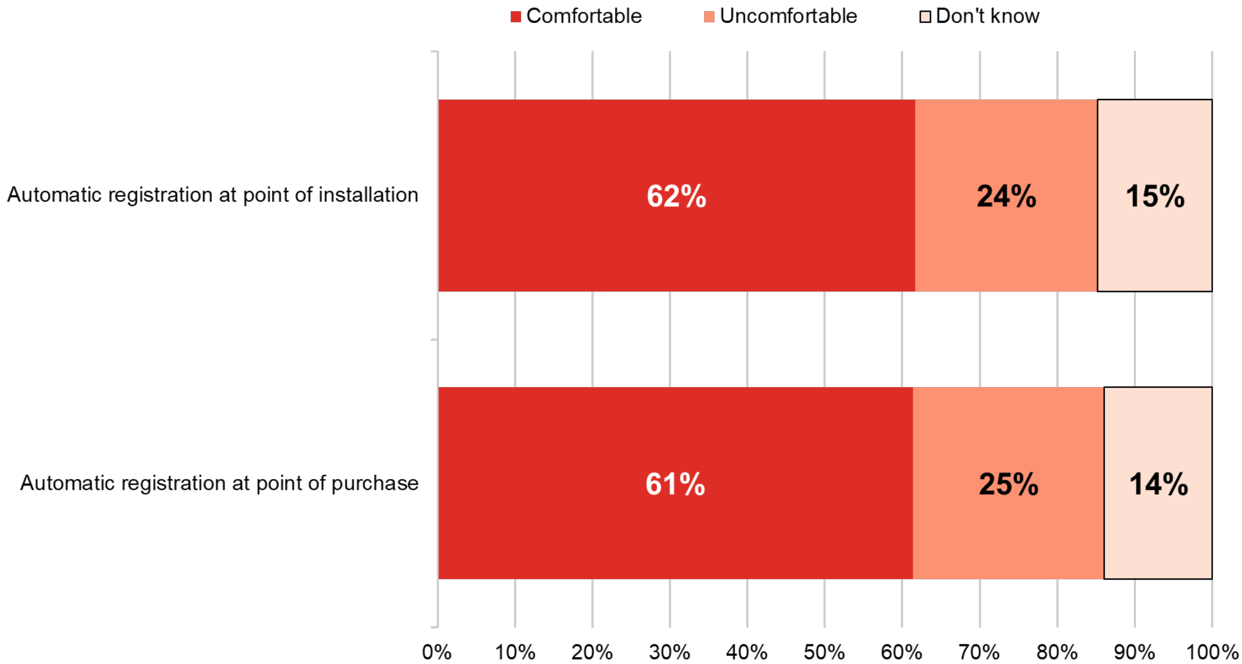
Renters are notably less likely than homeowners to be comfortable with automatic registration in either scenario. Two-thirds of homeowners would be comfortable (66% at point of purchase, 67% at point of installation) compared to less than three-fifths of renters (both 57%).

There is an upward age trend for comfort with automatic registration – just over half of those aged 18 to 29 are comfortable with automatic registration at the point of purchase, compared to over two-thirds of those aged 65 and over (53% 18 to 29, 59% 30 to 49, 65% 50 to 64, 67% 65+). The same pattern is seen around registration during installation. This is distinct from the trend across homeownership – even among homeowners, younger respondents are less likely than older respondents to feel comfortable with automatic registration. However, the trend mostly comes from declining uncertainty, i.e. younger respondents are more likely to say they "don't know" if they feel comfortable rather than younger respondents reporting discomfort with automatic registration.

In previous waves, it was found that those with high education levels are generally less likely to register an eligible product than those with medium or low education levels – in wave three, 28% of respondents with high education levels registered an eligible product they were asked about versus a third of those with medium (34%) or low education levels (35%). Here, those with high education levels are more likely to feel comfortable with automatic registration at the point of installation than those with lower education levels

(66% high, 61% medium, 57% low). A similar pattern is seen in the registration during purchase scenario.

Figure 29. Comfort with automatic registration at point of purchase or installation



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. To what extent, if at all, would you be comfortable with a product being automatically registered to you on your behalf, at point of purchase by the seller (assuming all contact information would not be used for marketing purposes)? / To what extent, if at all, would you be comfortable with a product being automatically registered to you on your behalf, at point of installation (where required) by an engineer (assuming all contact information would not be used for marketing purposes)?
Base: All respondents (10,156)

The offline sample are less comfortable with the idea of automatic installation either by the seller at the point of purchase (43% uncomfortable; compared to 14% of the online sample) or by the engineer at the point of installation (31% uncomfortable; compared to 15% of the online sample).

Conclusions

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

Although much of the UK public continue to believe the UK's system for regulation ensures products are safe, certainty is declining. This in line with overall declining trust when thinking about UK government departments' interaction with the product safety system. Despite declining trust and certainty around safety regulations, consideration of safety when buying a product remains unchanged, and relatively low in comparison to other factors. That being said, a focus on quality has increased compared to previous waves, which could have some crossover with the products' safety. Previous experience in buying a product continues to be the most influential factor when trusting that a product is safe, while branding of manufacturers and retailers is becoming less important.

The COVID-19 pandemic led to a growth in the amount of online shopping, consumers continue to feel that products bought from online retailers, marketplaces, and manufacturers are seen as safe, although caution regarding safety does vary depending on type. This wave also asked around the proportion of products bought online or instore, with products such as electrical appliances or large domestic appliances being most commonly bought online. Half of respondents felt that online marketplaces are safe to purchase from, and a large proportion report purchasing products from an online marketplace in the last six months, largely through platforms such as eBay and Amazon marketplace. Despite this high prevalence, by comparison, relatively few have actually sold items on online marketplaces themselves.

In accessing safety information currently, the majority of the UK public would prefer to access safety information through a physical product / label, rather than a digital display or QR code, although the latter is more popular with younger groups. That being said, overall awareness and understanding of safety labels has declined, with increasing proportions reporting that they do not know what marks they would look for on products, or that they would not look for any. As a result, more information may be needed to inform the public about safety messaging.

Only one in ten consumers who purchased a product in the last six months saying they experienced a safety issue of some kind; this is relatively consistent with previous waves. Despite prevalence being unchanged, there has been a significant reduction in the proportion of those who say their safety issue had no serious impacts, and a corresponding increase in those reporting physical harm. That being said, behaviour is relatively unchanged from previous waves as three quarters of those who faced a problem took action of some kind; most replacing/ exchanging the item.

Thinking about product registration, the UK public feel broadly comfortable with automatic registration, either at the point of purchase or point of installation, although older age groups are more likely to be comfortable with this. Previous waves showed that younger respondents are less likely to report registering their products, so more assurances on automatic registration could be beneficial for this age group.

Appendix A: Topical spotlights

Magnets and batteries

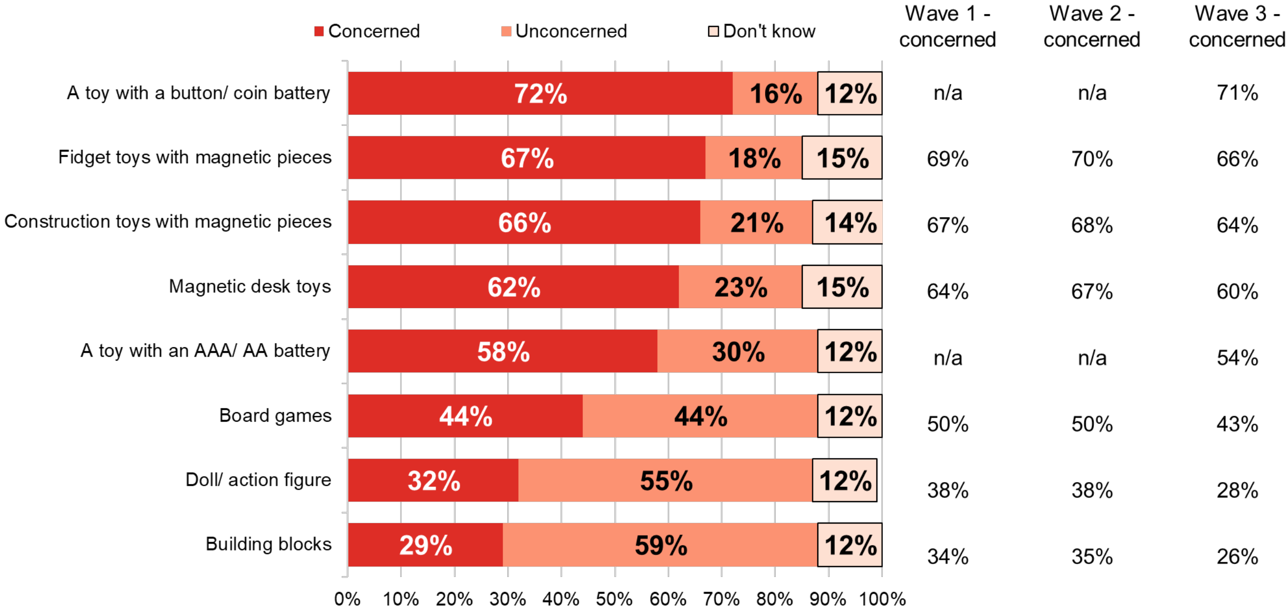
In wave four, questions on magnets and batteries were shown to approximately a third of all respondents, allocated randomly (n=3,384). Exact base sizes for specific questions are shown below each chart.

Two-thirds (67%) of adults would be concerned about whether fidget toys with magnetic pieces are safe for a child under five to play with. Slightly fewer feel the same way about construction toys with magnetic pieces (66%). These figures have remained consistent with last wave after previously seeing a small, but statistically significant, decline in concern from wave one. Waves three and four also asked around concern for a child playing with items that use batteries. The majority (72%) of respondents state they would be concerned with a toy that contained a button or coin battery. Comparatively, significantly fewer would be concerned about a child playing with a toy with an AAA/AA battery (58%).

Concern for both magnetic and button battery products remain consistent with the previous wave, instead the public's concern only increased when thinking about toys with an AAA/AA battery (58% from 54%), building blocks (29% from 26%) and doll/ action figures (32% from 28%). Despite their increases, the latter two represent the toys of least concern for those surveyed.

When thinking about toys with magnetic pieces, older age groups concern remained consistent with previous waves: 76% of those aged 65 and over are concerned about fidget toys and 74% of the same group are concerned about construction toys. This was also the case for those aged 50 to 64 (70% fidget toys, 71% construction toys). Comparatively, all younger age groups saw declining concern. Interestingly, these age groups do not report increased concern when thinking about magnetic desk toys, possibly due to these products being perceived as something children would not have contact with. Those aged 65 and over are also more likely to report concern about battery products (84% toy with button battery, 70% toy with AAA/AA battery).

Figure 30. Safety concerns for a child under 5 to play with each item



Q: Thinking about the following types of toy, how concerned or not would you be that they are safe for a child under 5 to play with?
Base: All respondents in magnets and button battery section (W1=3,408; W2=4,127; W3=6,795; W4 3,384)

Despite overall increasing concern, there continues to be a gender divide: women are more likely than men to report being concerned about fidget toys with magnetic pieces (72% vs 62%), construction toys with magnetic pieces (71% vs 60%), and magnetic desk toys (67% vs 56%). This divide was also seen when thinking about toys with a button battery (77% vs 67%) or AAA/AA battery (61% vs 55%). Interestingly, men report an increase wave on wave when thinking about the safety of construction toys, while women's concern remains consistent, men report an increase from 57% to 60%.

Largely, concern surrounding magnetic products remains consistent regardless of whether respondents have children in their household, this is not the case when thinking about button batteries where those with children in their household are less likely than those with no children to report concern (69% vs. 74% respectively). This is also the case when thinking about toys with AAA/AA batteries (51% vs 61%).

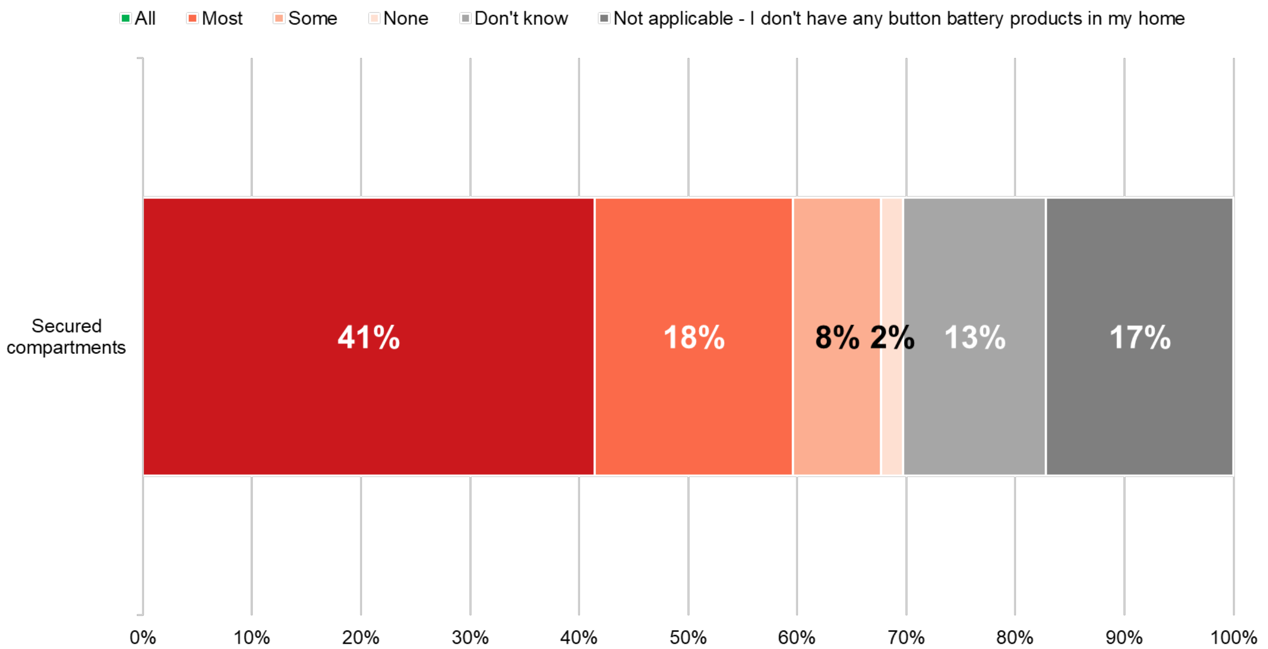
Reported purchase behaviour for magnetic toys remains relatively low: a little under one in ten (8%) of respondents state that they had purchased any items with magnetic pieces in the last six months, compared to 20% of those who stated they had purchased any items that contained button batteries. This represents a decline for both product types compared to last wave, although this is more evident for button batteries (25% in wave three) than magnets (10% in wave three).

Across both product types, younger respondents are more likely to state they have purchased something: 10% of 18 to 29s report purchasing a product with a magnet in, compared to 3% of those aged 65 and over. Likewise, a quarter (24%) of 18 to 29s report purchasing a product with a button battery, compared to a sixth (16%) of those aged 65 and over. This represents a significant decline for the latter group from a fifth (21%) in wave three.

The majority (67%) report that at least some of the items with button batteries in their home have secured battery compartments, with two fifths (41%) reporting this is the case for all of the items. Comparatively, a minority (2%) report than none have secured compartments.

Ethnic minority respondents are less likely than white respondents to report that all of their items have secured compartments (33% vs. 42% respectively). Comparatively they are more likely to report none have secured compartments (5% vs. 2% respectively).

Figure 31. Button battery secured compartments



Q: Thinking about all items with button batteries in your home, to what extent are the battery compartments secured?
Base: All respondents in magnets and button battery section (W4 n=3,384)

A very small minority of the UK public (1%) report that someone in their household has ever swallowed or nearly swallowed a button battery. Unlike in previous waves, there was no difference across age groups. There is also no difference when comparing those with and without children in their household.

Distress/ increased stress is the most commonly identified result of swallowing, or nearly swallowing, a button battery (65%).Comparatively, the proportion reporting that it caused physical harm sits at one in ten (9%).

Magnet campaign

Since April 2022, five percent said that they had seen adverts about magnet safety that were in the style asked about in the survey[8], this is a marginal shift from wave two (3%),

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

but consistent with wave three (4%). This rose to eight percent for those aged 18 to 29, this is significantly higher than those aged 50 to 64 (3%).

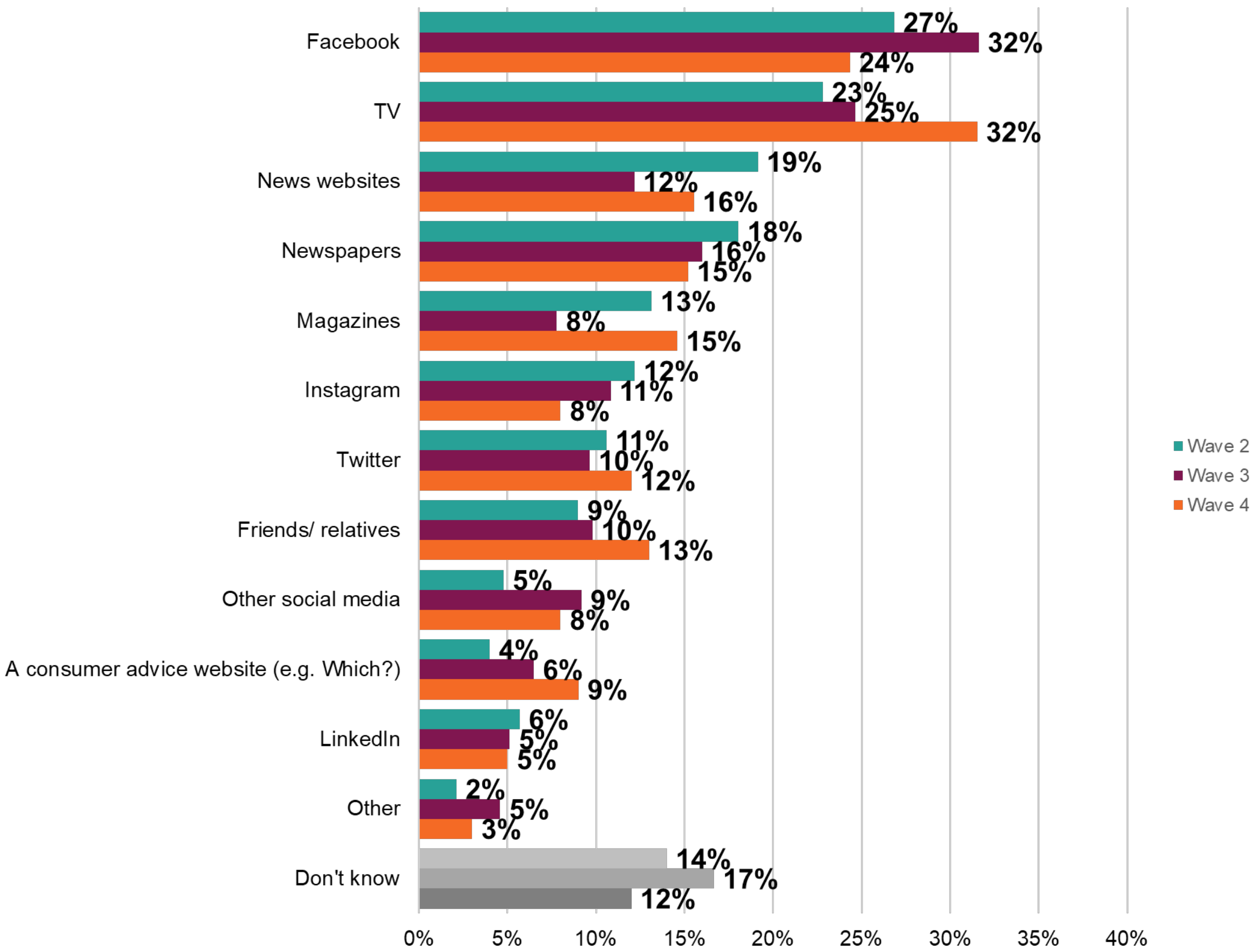
The adverts are also more commonly recognised by those with children in their household (8%) compared to those without (4%). Among this group, respondents with children 10 years old and under are most likely to report seeing them before (10%).

The adverts are more commonly recognised by those living with a disability (7%) compared to those without (4%).

Respondents from a minority ethnic background are more likely to state they have seen an advert in that style (9%) compared to white respondents (4%).

Among those who report seeing the campaign since April 2022, TV (32%) and Facebook (24%) are most commonly cited as the source. This represents a change from previous waves, the proportion reporting they saw the advert on Facebook declined significantly from wave three (32%), while those saying they saw it on TV increased (from 25%). There was also a shift in the proportion reporting they saw it in a magazine (from 8% to 15%).

Figure 32. Where adverts about magnet safety were seen

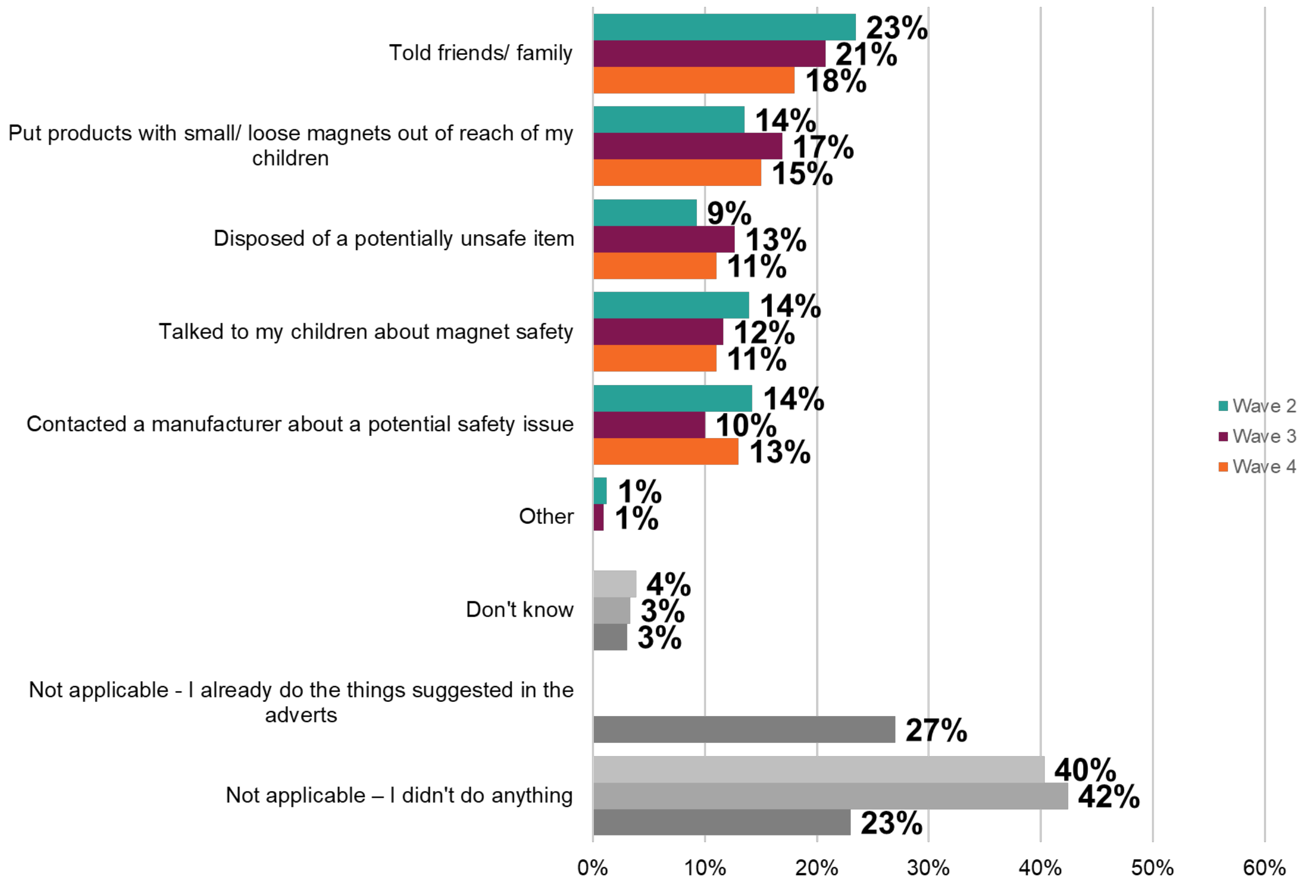


Q: You said you'd seen adverts about magnet safety recently. Which, if any, of the following places did you see them? (Please select all that apply)
Base: All who saw campaign (W2=294; W3=337; W4 n=350)

Younger respondents are less likely than others to report seeing the campaign on TV, one fifth (22%) of 18 to 29s report this compared to two fifths of those aged 50 to 64 (43%) and 65+ (42%). Those aged 30 to 49 are most likely to report seeing the campaign on social media: one third (34%) report seeing it on Facebook and a quarter (23%) report seeing it on Twitter.

As seen in previously, among those that had seen adverts about magnet safety in the last six months, close to half (47%) took at least one of the actions listed. Most commonly, they told friends/ family (18%). Around one in ten talked to their children about magnet safety (11%) or contacted a manufacturer about a potential safety issue (13%). All actions remain consistent with last wave. Close to a quarter (27%) report that they already did the actions suggested in adverts, while a similar proportion (23%) state that they did not do anything at all.

Figure 33. Actions taken as a result of seeing adverts about magnet safety



Q: You said you'd seen adverts about magnet safety recently. Which, if any, of the following places did you do as a result? (Please select all that apply)
Base: All who saw campaign (W2=294; W3=337; W4 n=350)

In line with wave three, respondents with children in the household are much more likely than those without to say that they took one of the actions listed (64% vs. 33%). One fifth (22%) report they spoke to their child about magnet safety and a quarter (26%) told their friends and family.

The findings suggest that the adverts continue to resonate more strongly with minority ethnic respondents than white respondents. The vast majority (77%) of ethnic minority respondents say that they took at least one of the actions listed after seeing the adverts (compared to 39% of white respondents).

This is also the case when looking at those who are limited a lot by a disability, six in ten (60%) report taking any action, compared to 46% without a disability.

Batteries campaign

Six percent of the UK public report that they had seen adverts about button / coin battery safety in the style asked about in the survey[9] in the last six months, in line with last wave (5%). Unlike the magnet campaign, recognition was similar across age groups: 7% of 18 to 29s stated they had seen one, while 6% of those aged 65 and over reported the same.

Similar to the magnet campaign, the adverts are also more commonly recognised by those with children in their household (9%) compared to those without (5%). Among this group, respondents with children five years old and under are most likely to report seeing them before (12%). This is consistent with last wave.

As seen last wave, respondents from an ethnic minority background are more likely to state they have seen an advert in that style (10%) compared to white respondents (5%).

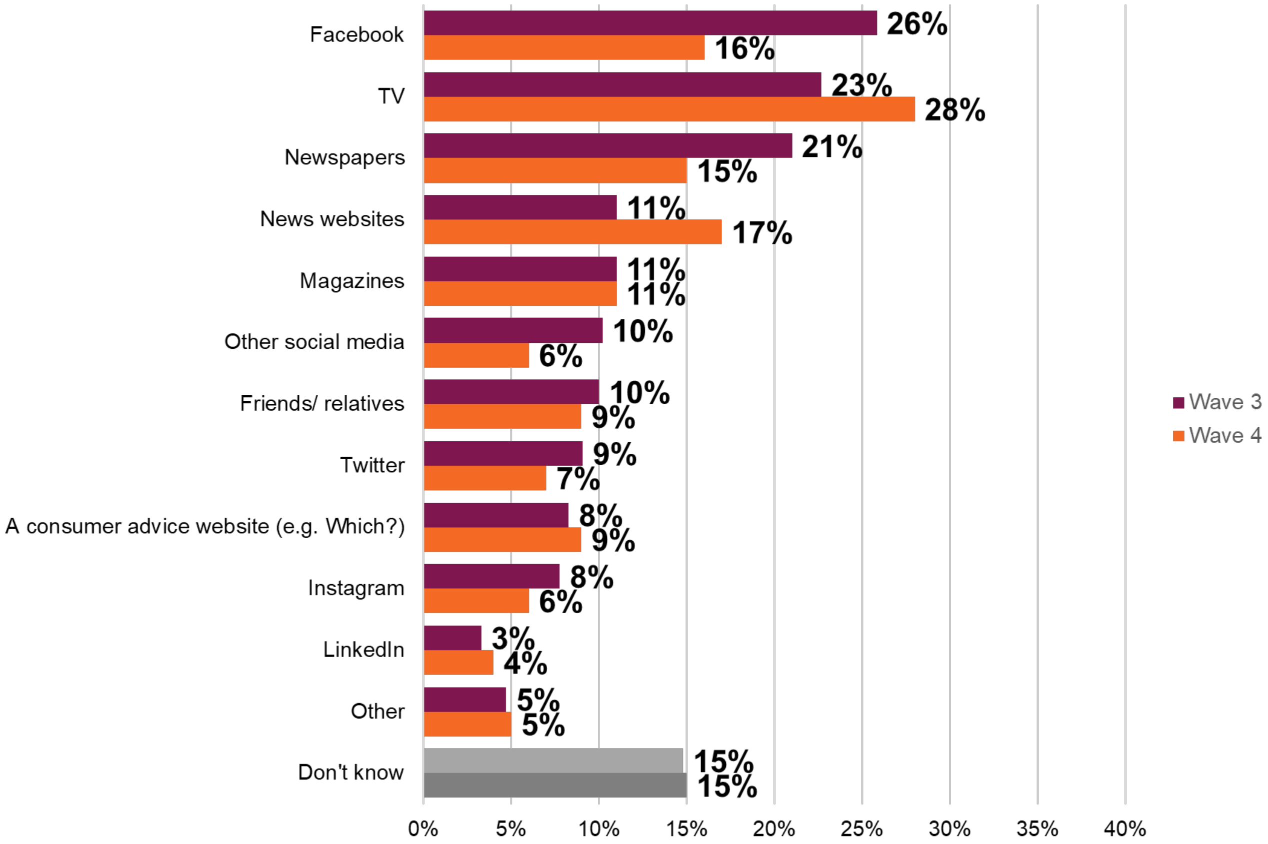
This is also the case for those who are living with a disability (8%) compared to those who aren't (5%).

Among those saying that they had seen adverts about button/ coin batteries, respondents most commonly stated they saw them on Facebook (16%) or TV (28%). As seen with the magnet advertising this represents a decline for Facebook (26% in wave three), although the proportion reporting they saw it on TV has remained consistent. There has also been an increase among those who report that they saw the adverts on news websites (from 11% to 17%).

Those aged 18 to 29 are more likely than those aged 50 and over to report seeing the adverts on Instagram (15%) or through friends and relatives (16%). Unlike the magnets campaign, there is no difference among age groups as to whether the advertising was seen on TV.

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

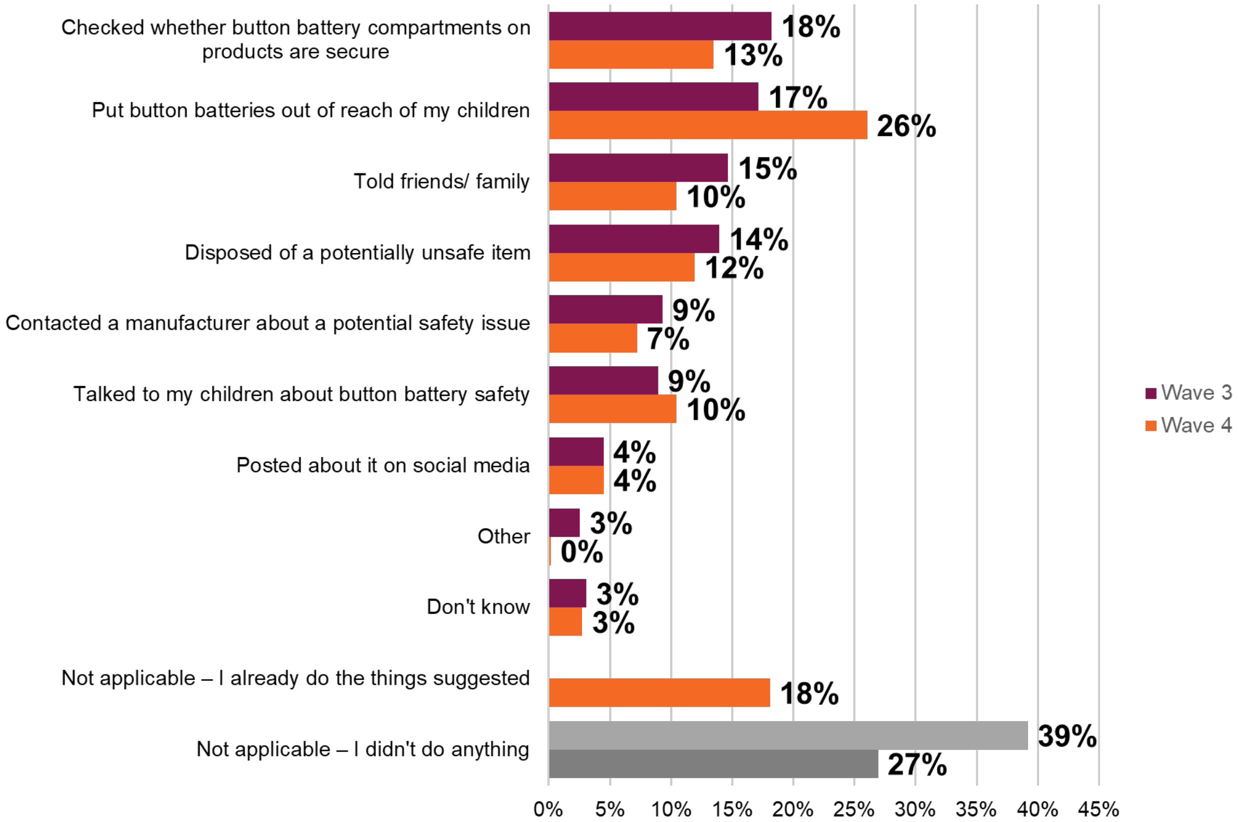
Figure 34. Where adverts about button/ coin battery safety were seen



Q: You said that you'd seen adverts about button battery safety recently...Which, if any, of the following places did you see them? (Please select all that apply)
Base: All who saw campaign (W3=329; W4=350)

Among those that had seen adverts about magnet safety since March 2021, half (51%) took at least one of the actions listed, this is consistent with last wave. Most commonly, they put button batteries out of the reach of children (26%), this saw a significant increase compared to wave three (17%). One fifth (18%) report that they already do the things suggested in the adverts.

Figure 35. Actions as a result of seeing adverts about button/ coin battery safety



Q: You said that you have seen adverts about button battery safety recently...Which, if any, of the following did you do as a result? (Please select all that apply)
Base: All who saw campaign (W3=329; W4=350)

A little over a quarter report they did not do anything as a result of seeing the campaign, although this is driven by those with no children in their household, with over a third (35%) reporting this, compared to 14% of those with children in their household.

Two fifths (38%) of those with children in their household put the button batteries out of reach of their children, and a quarter (26%) talked to their children about button safety.

Those limited a lot by a disability who saw the campaign are more likely to report taking action compared to those without a disability (59% vs. 50% respectively).

Alongside their increased likelihood to see the adverts, respondents from an ethnic minority background who saw the campaign are more likely to state they took action (72%) compared to white respondents (48%).

Country of origin labelling

In wave four, questions on country of origin labelling were shown to approximately a third of all respondents, allocated randomly (n=3,381). Exact base sizes for specific questions are shown below each chart.

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

Although people continue to report that labels which state a product has been 'Made in the UK' makes them more likely to purchase that product, the proportion has fallen since the question was last asked (60% W1, 55% W4). The fall has been driven by older men in particular – when previously asked, three-quarters of men aged 65 and over (74%) said a 'Made in UK' label would make them more likely to purchase a product, compared to only 61% who reported the same in wave four. There has also been a drop amongst white respondents (61% W1, 55% W4) and those with low education levels (66% W1, 57% W4).

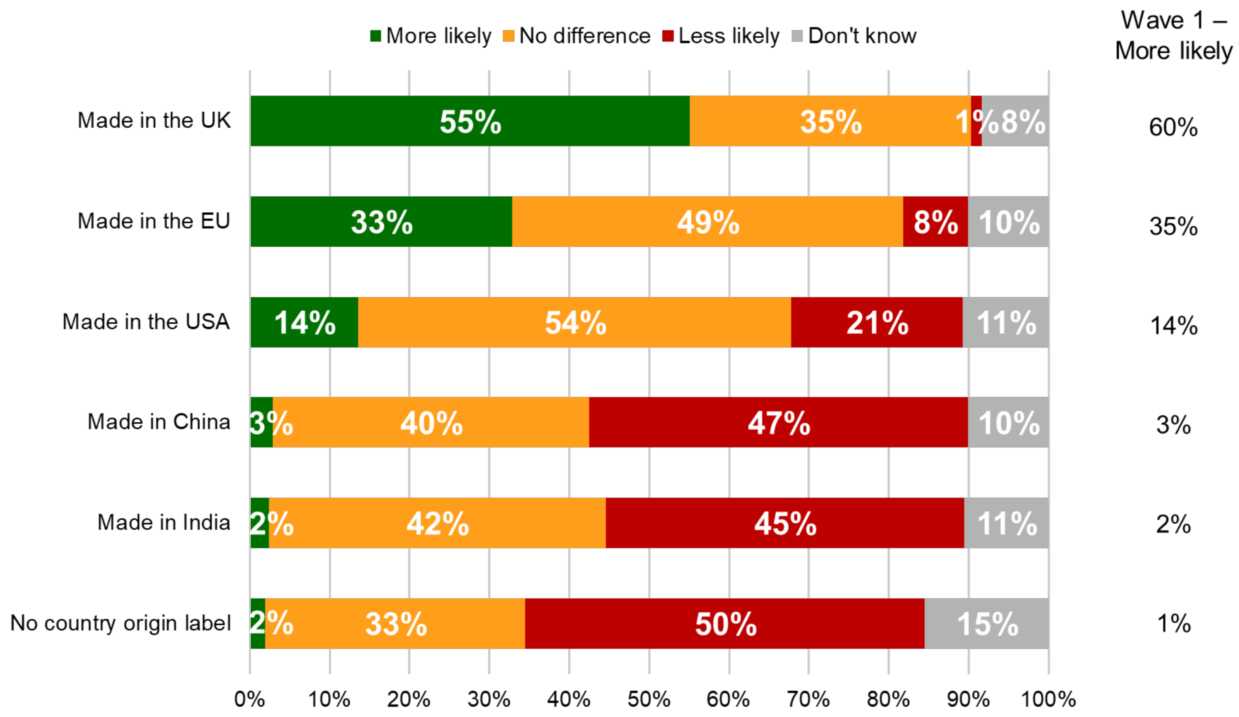
The fall in the proportion saying 'Made in the UK' makes them more likely to buy a product is most evident amongst respondents who were asked about clothes (63% W1, 52% W4) and non-electrical homeware (64% W1, 54% W4).

There has been no parallel shift in the perceptions around other country of origin labelling. A third report that 'Made in the EU' would make them more likely to purchase a product (33%) and 14% said the same for 'Made in the USA', while 'Made in China' and 'Made in India' would only drive a small proportion of respondents to purchase a product (3%, 2% respectively).

Consistent with wave one, many respondents report that country of origin makes no difference in their purchase decisions. Across most countries tested, those aged 18 to 29 remain the most likely to report that a country of origin label makes no difference to their purchase decision – over half for 'Made in the USA' (55%) or 'Made in India' labels (54%), around half for 'Made in China' (51%) or 'Made in the EU' (47%), and two-fifths for 'Made in the UK' (401%).

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

Figure 36. Impact of country of origin label on purchase decision



Q: To what extent, if at all, would seeing each of the following on a labelling/ packaging impact your decision to buy that product?
Base: All in product labelling section (W4=3,381)

The downward shift around 'Made in the UK' country of origin labelling is also evident when respondents are asked what they think this labelling means. Compared to wave one, in 2020, there have been significant shifts downward for several perceptions around product labelling – in particular, thinking the product has been checked by UK regulators (47% W1, 41% W4), the product is safe to use (37% W1, 31% W4), or that the product is good quality (30% W1, 24% W4). There has been a corresponding increase in the proportion who believe 'Made in the UK' does not mean anything, that products with this label are exactly the same as products without it (9% W1, 12% W4).

The shift in perceptions is evident across both men and women, but older respondents are more likely to have changed their views than younger respondents. Around a fifth of those aged 18 to 29 think a 'Made in UK' label means a product is safe to use (19% W1, 19% W4). In wave one, half of those aged 65 and over held this view, but this has fallen to two-fifths (52% W1, 41% W4).

In the qualitative research, participants said country of origin was an important factor for choosing products to purchase. UK- and EU-made were seen as having a high degree of product quality. Participants also indicated that they would continue purchasing certain low-quality products because they were far cheaper. There was some wariness from participants in buying electronics from countries like China, who were deemed of having a poor reputation for product safety and quality.

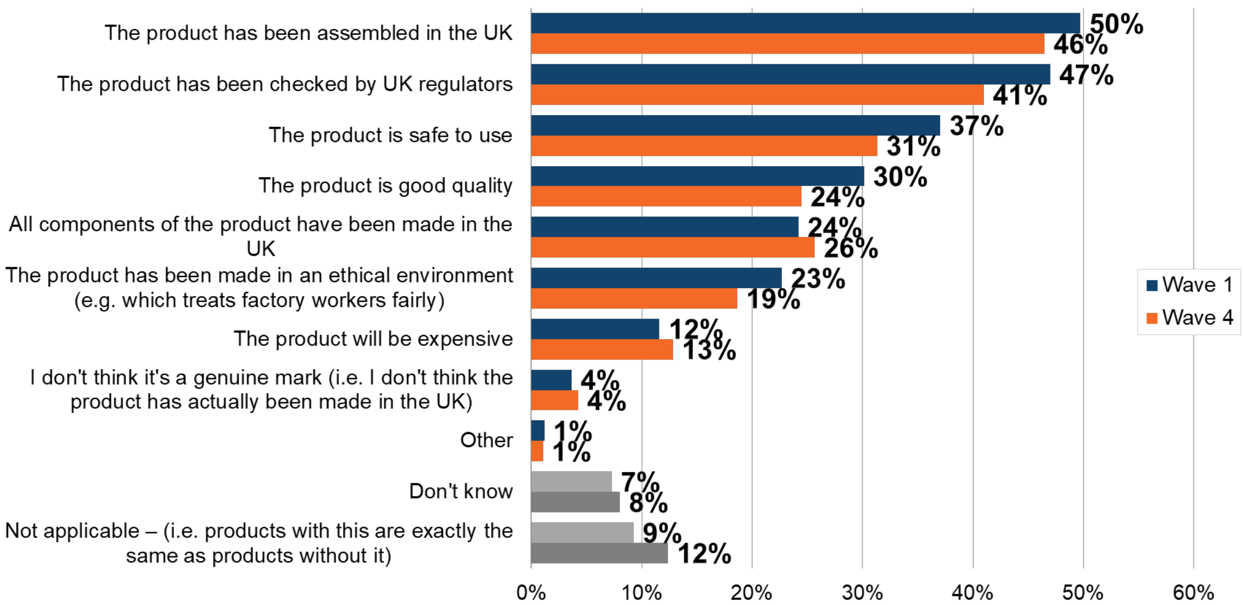
"I tend to think the quality is higher in EU, certain Asian countries (Japan, S. Korea) and avoid computer/phone/IT electronics from others (China in particular)." 18-40-year-old, C2DE

"Unless made specifically in the UK which makes me feel that it has been well tested and is likely to be safe." 18-40-year-old C2DE

"Certain goods I would not buy from certain countries as they have different standards to ours and EU." Parent w/children under 18, C2DE

The offline sample are less likely to purchase a product from the EU (23% less likely to purchase a product if it's made in the EU, and 12% more likely to purchase); this is significantly different to the online sample who are more likely to purchase a product if they see its been made in the EU (33% more likely, and 8% less likely to purchase).

Figure 37. Meaning of 'Made in the UK' label



Q: To what extent, if at all, would seeing each of the following on a label/ packaging impact your decision to buy that product?
Base: All in product labelling section (W1=3,403; W4=3,381)

There has been a significant increase amongst respondents with a disability believing that 'Made in the UK' is not a genuine mark, i.e. the product has not been made in the UK, (3% W1, 6% W4). This shift is not seen amongst those without a disability (4% W1, 4% W4).

Inclusive design

In wave four, questions on inclusive design were shown to approximately a third of all respondents, allocated randomly (n=3,388). Exact base sizes for specific questions are shown below each chart.

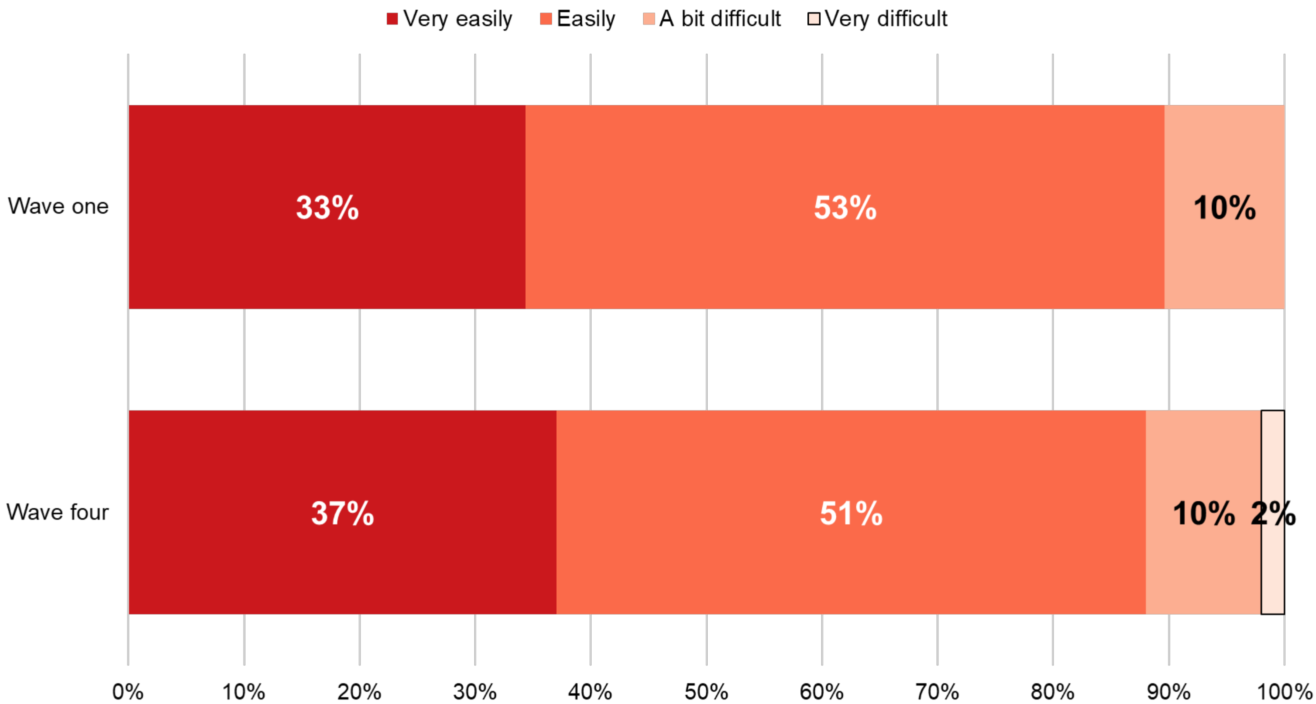
Inclusive design is the design of mainstream products and/ or services that are accessible to, and usable by, as many people as reasonably possible without the need for special adaptation or specialised design. The vast majority (88%) find items that they can easily use when purchasing products, with over a third (37%) saying they can find these products very easily.

Men are more likely than women to say they find products they can operate easily (90% vs 87%). Older respondents are more likely to have difficulty finding easy-to-use products than younger respondents, with 16% of 65+ year olds having difficulty compared to 11% of 18 to 29 year olds. To some degree this may be due to the higher prevalence of disability amongst older groups – 42% of those aged 65 and over are limited in their day-to-day life to some degree, compared to 26% of those aged 18 to 29. However, the trend remains even when controlling for disability; older disabled people are more likely to have difficulty finding easy-to-use products than younger disabled people (23% vs 16%).

Those who have a disability are more than twice as likely than those without to have experienced difficulty (20% vs 8%). Notably, there is no significant difference in overall ease or difficulty finding easy-to-use products between waves one and four.

People from ethnic minorities are significantly more likely to have trouble finding accessible products than white people (16% vs 11%), with a fifth of Asian people saying they have had difficulty finding items that they can easily use (21%).

Figure 38. Ease of finding easy-to-use products when shopping



Q: Inclusive design is the design of mainstream products and/or services that are accessible to, and usable by, as many people as reasonably possible without the need for special adaptation or specialised design. When purchasing products, to what extent can you find products that you can use / operate easily?
Base: All in inclusive design section (W1=3,399; W4=3,388)

As noted above, more than a third (37%) find it very easy to find products they can use easily and a similar proportion of people agree that inclusive products are widely available (36%). Men are significantly more likely than women to think inclusive products are widely available (42% vs 31%), with younger respondents also being more likely than older respondents to think this (42% 18 to 29 vs 32% 65+). Ethnic minorities are more likely than white people to disagree with the statement that inclusive products are widely available (21% vs 15%).

Furthermore, when looking at cost, 40% agree that an inclusive product costs a lot more than non-inclusive products, with women being significantly more likely than men to think this (42% vs 38%). A majority of 18 to 29 year olds (52%) also think this, compared to just 32% of those aged 65 and over.

Those who are limited a lot by their disability (49%) are more likely than those limited a little (38%) or those without a disability (40%) to report that inclusive products cost more.

Ethnic minority respondents are more likely than white people to disagree with the statement that inclusive products are widely available (21% vs 15%). They are also more likely than white respondents to agree with the statement that inclusive products cost more (47% vs 40%).

Those who are limited a lot by their disability (49%) are more likely than those limited a little (38%) or those without a disability (40%) to report that inclusive products cost more.

The vast majority (71%) believe that at least some products should be designed with everyone in mind. Of this, three in ten (31%) think that *all* products should be, with a further 29% who believe that no products should be and that people with different needs can buy different products.

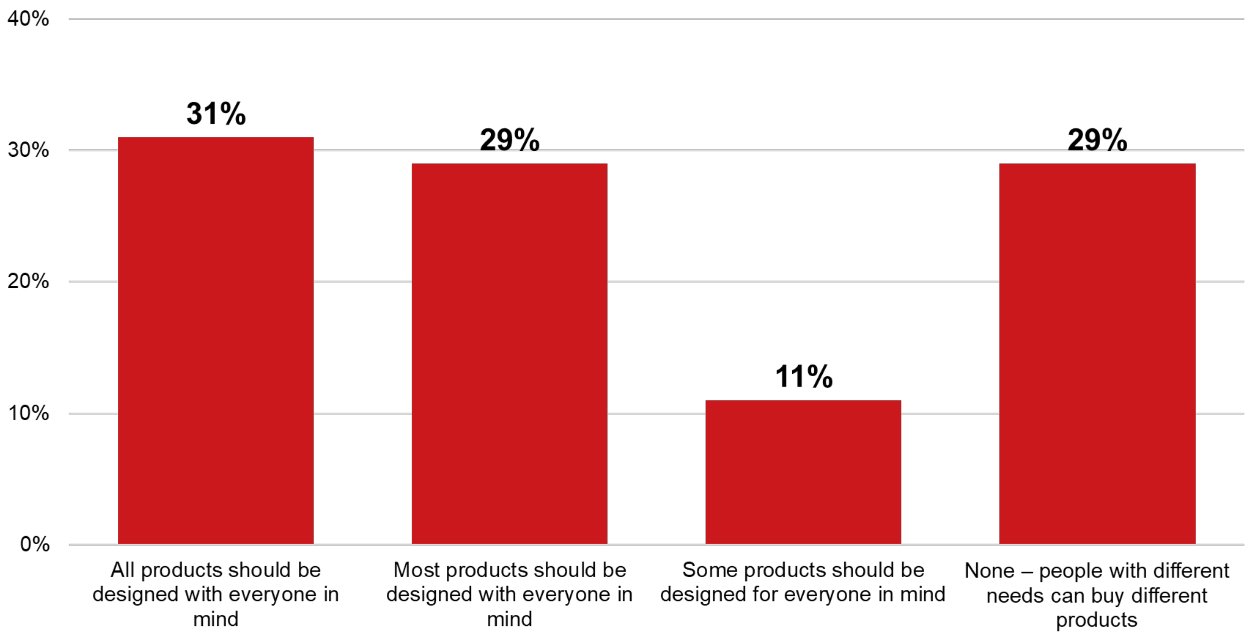
Whilst there was no difference between men and women and their likelihood to think at least some products should be designed with everyone in mind, women are significantly more likely to think that all products should be (34% vs 28%). Furthermore, those aged between 18 and 29 are significantly more likely than those aged 65 and over to think that at least some products should be designed with everyone in mind (75% vs 62%), but interestingly they are less likely to believe that all products should be (27% vs 31%).

It is worth noting that there was no significant difference in likelihood to think that at least some products should be designed with everyone in mind between those with or without a limiting disability (both 71%).

Over three quarters (77%) of ethnic minority respondents think that at least some products should be designed with everyone in mind, statistically more likely than white people (70%).

The offline sample are less likely than the online sample to think that products need to be designed with everyone in mind (with 56% saying that at least some products need to be designed with everyone in mind, compared to 71% of the online sample).

Figure 39. Proportion of products which should be made inclusive



Q: Thinking about the wide range of UK consumers who have differing needs... Which of the following statements come closest to your view?
Base: All in inclusive design section (W4=3,388)

When it comes to whose responsibility it is to ensure that products are inclusive, half of respondents believe that it is the manufacturer's (50%), significantly fewer than the 56%

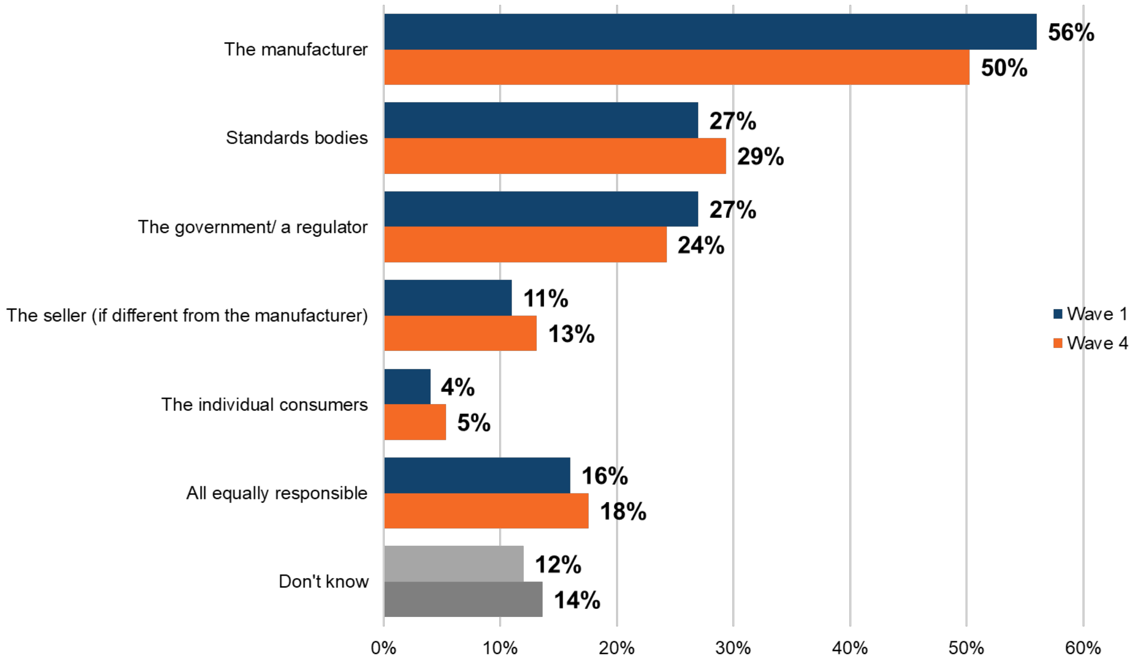
who believed it was the role of the manufacturer in wave one. Following this, 29% now state that it is down to the standards bodies, and a quarter (24%) believe it is the responsibility of the government/ a regulator. Just under a fifth (18%) believe all are equally responsible, with a further 13% stating the seller (if different to the manufacturer), and just 5% believe it is the responsibility of the individual consumers.

Young people (18 to 29 year olds) are significantly more likely than those aged 65 and over to believe that it is down to the government/ a regulator (29% vs 20%), whilst older respondents are statistically more likely to say it is the responsibility of the manufacturer (55% vs 45% of 18 to 29 year olds).

Those with a disability are significantly more likely than those without a disability to say it is either the responsibility of a standards body (32% vs 28%) or the seller (15% vs 12%).

White respondents are more likely than ethnic minorities to think that it is the responsibility of the manufacturer (51% vs 44%).

Figure 40. Responsibility for ensuring products are designed to be usable for differing needs



Q: Who do you think is responsible for ensuring products are designed so that they are usable to a wide range of UK consumers with differing needs? (Please select all that apply)
Base: All in inclusive design section (W1=3,399; W4=3,388)

Smart devices

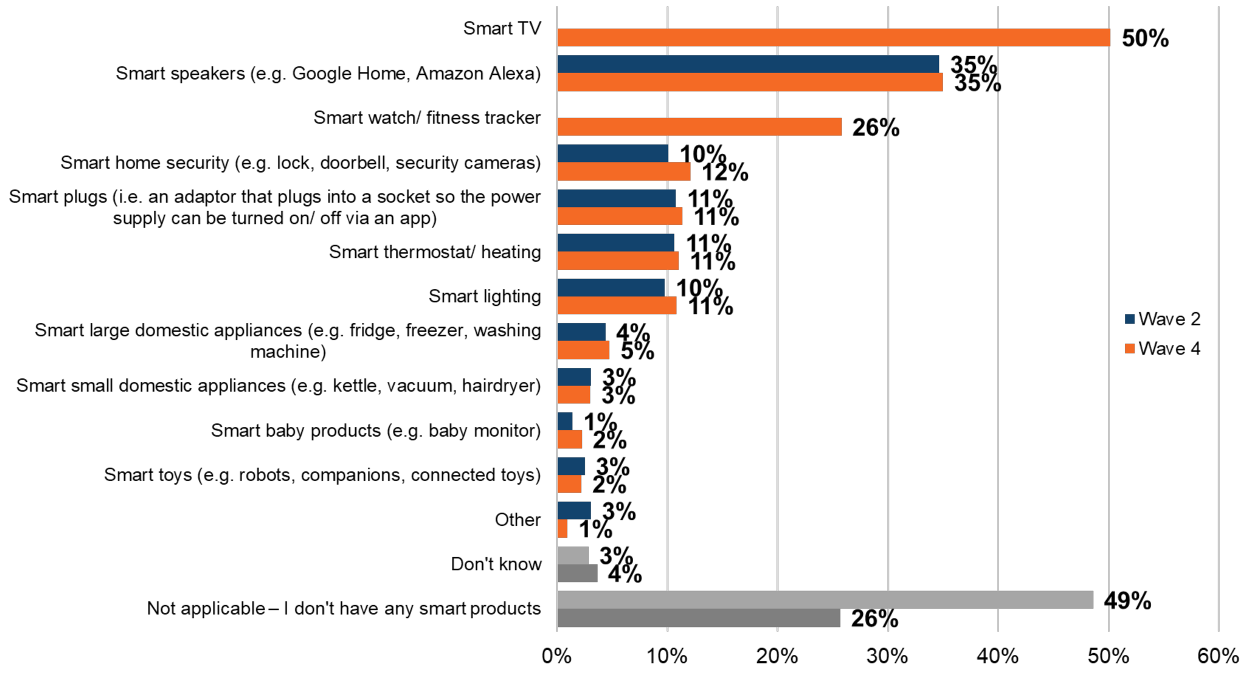
In wave four, questions on smart devices were shown to approximately a third of all respondents, allocated randomly (n=3,395). Exact base sizes for specific questions are shown below each chart.

In wave four, consistent with previous findings, around one in ten (11%) of those who had purchased an electrical appliance in the past six months bought a smart home device. However, a quarter (25%) of those who purchased a large domestic appliance in the past six months report their product was 'smart' – a marked increase from previous waves (18% W3, 19% W2, 14% W1).

When asked about all products they own or have access to, the most common is a smart TV (50%), followed by smart speakers such as Google Home (35%) and smart watches/ fitness trackers (26%). Excluding smart TVs and fitness trackers, as these were new additions in wave four, ownership of each type of smart product has remained consistent with when the question was previously asked.

There has been an increase in the proportion of homeowners who report owning/ having access to smart home security (12% W2, 16% W4) – a shift that is not seen to the same degree amongst renters (6% W2, 8% W4). There has also been an increase in smart home security amongst respondents with a disability that limits their day to day life (9% W2, 13% W4).

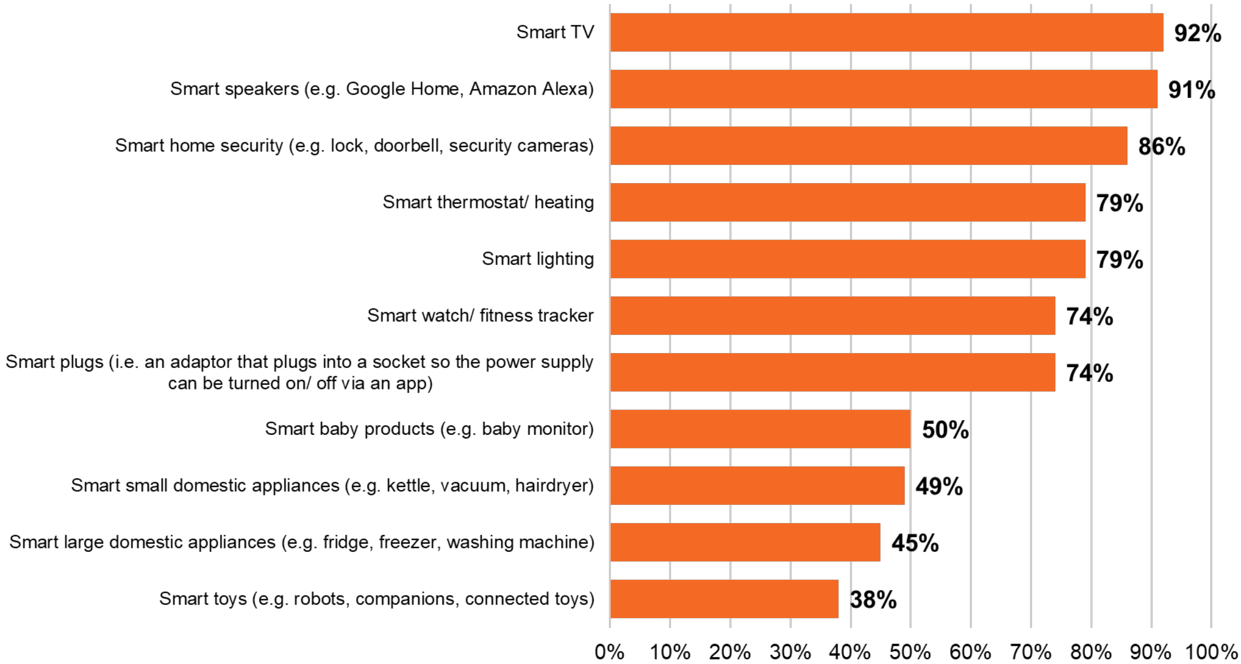
Figure 41. Which smart products adults own/ have access to



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 products section (W2 n=4,118; W4 n=3,395)

Many people who have smart products do connect them to the internet. Nine in ten of those who have a smart TV (92%) or smart speakers (91%) have connected them to the internet. However, less than half of those who own a smart large domestic appliance (45%) or smart toys (38%) have connected them to the internet. This implies that although products may come with 'smart' features – for some, these features may not be necessary for the normal functioning of the product and may be ignored.

Figure 42. Whether smart devices owned have been connected to the internet



Q: You previously said you own the following smart products…Which, if any, of the following smart products have you connected to the internet?
Base: All smart products section who own/ have access to smart products: smart lighting (n=354), smart thermostat heating (n=370), smart home security (n=406), smart baby products (n=75), smart speakers (n=1183), smart toys (n=73), smart large domestic appliances (n=161), smart small domestic appliances (n=96), smart plugs (n=376), smart TVs (n=1691), smart watch/ fitness trackers (n=894)

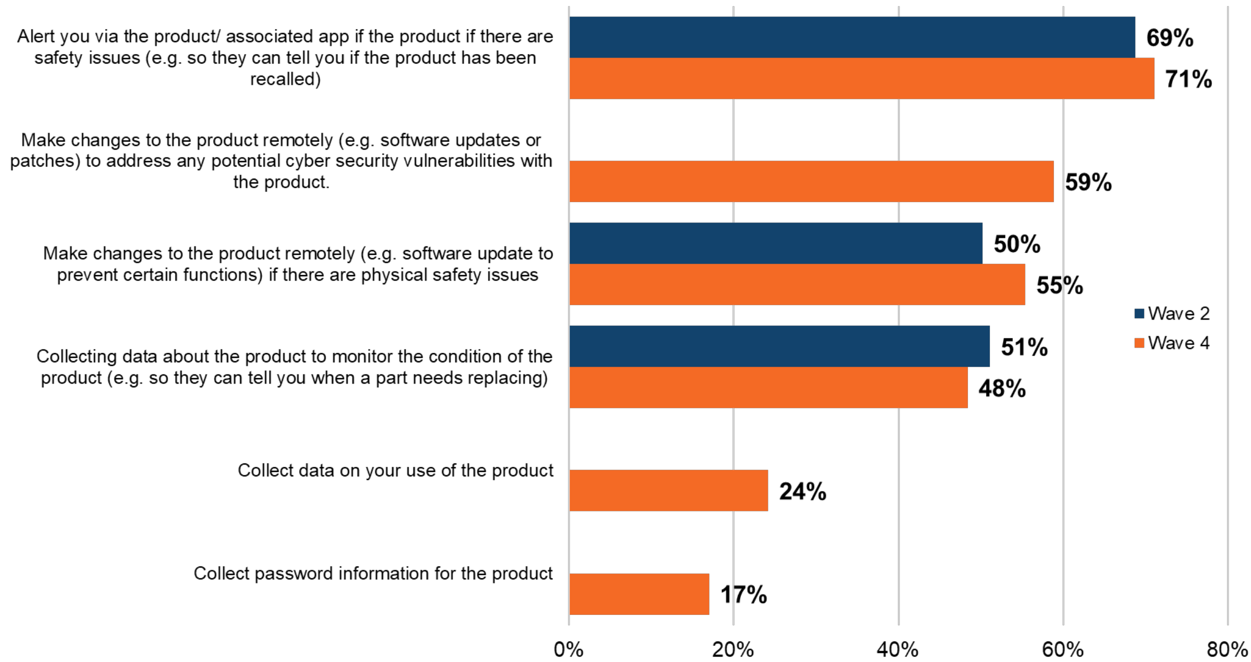
The majority of respondents in the smart product section are comfortable with manufacturers of smart products alerting them if there is a safety issue (71%), making changes remotely to address cyber security issues (59%), or making changes remotely to address physical issues (55%). Just under half felt comfortable with the manufacturer collecting data to monitor the condition of the product (48%) but only a quarter felt comfortable with the collection of usage data when the reason was not specified (24%).

The proportion feeling comfortable with remote interventions in case of physical safety issues has risen since wave two. This shift is seen across all core demographics, except respondents from an ethnic minority (55% W2, 51% W4) and those with social grade C2DE (49% W2, 50% W4).

In wave two, it was noted that older respondents tended to be less comfortable with remote interventions and data collection. Controlling for smart product ownership, this trend is no longer evident – 65% of 18 to 29 year olds who own/ have access to a smart product are comfortable with remote interventions in the event of a safety issue and 62% of those aged 65 and over say the same. Similarly, there is now no trend by age for comfort with data collection to monitor the condition of a product (59% 18 to 29, 55% 65+).

There does appear to be a downward trend by age for comfort with the manufacturer collecting password information on their smart product. Overall, only around one in six of the UK public would feel comfortable with this (17%). Amongst those who own smart products it is broadly consistent (19%), but owners under thirty are more likely to feel comfortable with this than those aged 65 and over (23% vs 17%).

Figure 43. Proportion comfortable with intervention scenarios



Q: How comfortable, if at all, do you feel about the manufacturer of your smart good doing each of the following? If you don't currently own any smart products, please imagine how you would feel if you did.
Base: All in smart products section (W2 n=4118; W4 n=3395)

Two thirds of those with access to smart products considered cyber security[11] of a smart product before purchasing it (66%). A quarter report that they did not consider cyber security at all (25%), rising to a third of respondents aged 65 and over (34%). There is an upward trend by education level for considering cyber security – 62% of those with a low education level considered it, 66% with a medium level, and 71% with high education.

White respondents are less likely than those from an ethnic minority to consider cyber security in the purchase of a smart product (26% did not consider vs 16%).

Unchanged from wave two, just over half of those with access to a smart product say they give the safety of smart and non-smart products the same level of consideration (55% W2, 53% W4). A quarter say they consider safety more with smart products (27%) and this remains highest among ethnic minority respondents (37%).

In the qualitative research, smart devices were associated with a broad range of products by participants from the audience segment. Devices that can be digitally connected through different apps to 'improve people's lives' were a commonly reflected sentiment related to smart devices. The Amazon Echo and Alexa were products referenced by participants.

[11] Cyber security was defined as "How to reduce the risk of a cyber-attack. This includes protecting devices (e.g. smartphones, laptops, tablets) and services from theft or damage. It also includes preventing unauthorised access to personal information stored on devices/ online"

There were mixed perspectives on smart devices, with some participants saying they were wary of using them at all, most were concerned about security and data integrity. Many participants said they still used smart devices but still held negative opinions about them.

There was a lot of reluctance and a fear of what type of information these devices were collecting and what they were utilising it for. Advertising data and private, personal information was seen to be the types of information that participants said they had the most concerns about. Fear of being monitored was strong as well with participants saying they were very concerned about having their information or spending habits tracked.

“I think a lot of people worry about installing a device they don't fully understand, and how it might be doing something not explicitly made clear in advertising etc.” (18-40-year-old, ABC1)

“While I generally trust that GDPR/data regulations are adhered to, there is so much data out there, and so many bad actors that you should be cautious about what you share.” (18-40-year-old, ABC1)

“I've read some horrific stories about smart devices especially the ones for electricity etc.” (41+-year-old, C2DE)

“I don't think any data is saved at all, always said all these new gadgets coming out is just another way to either spy on you or get your data.” (41+-year-old, C2DE)

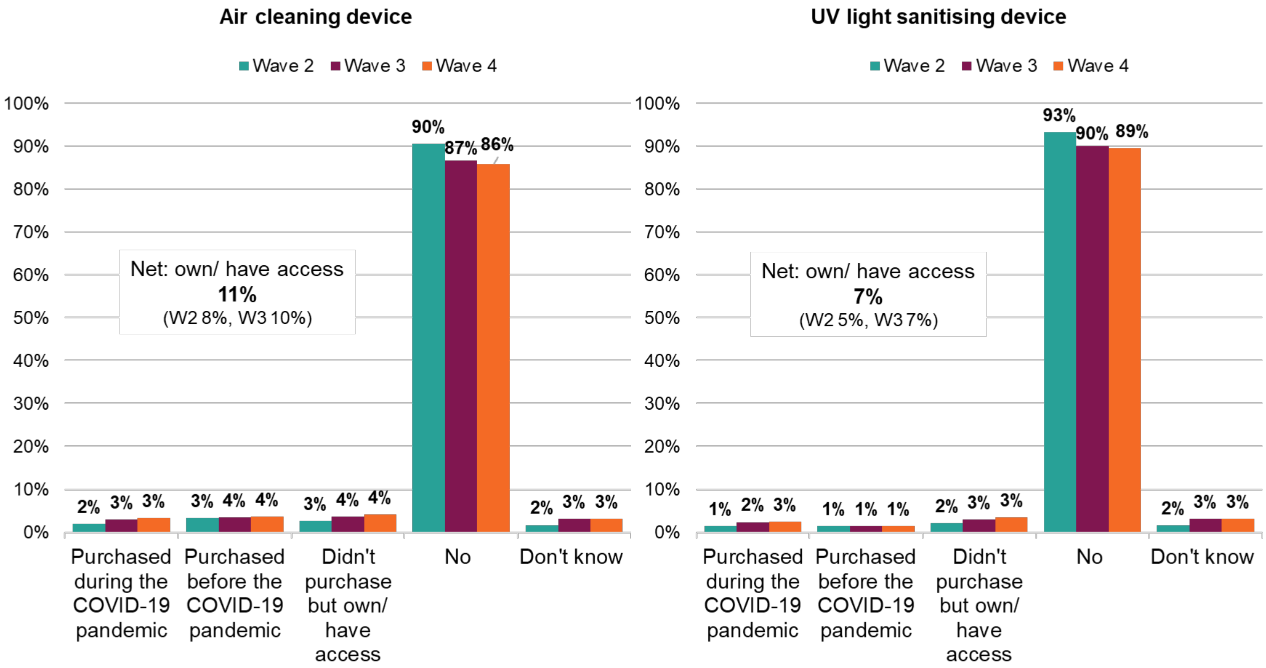
UVC and air cleaners

In wave four, questions on UVC and air cleaners were initially shown to all (n=10,156), and subsequently shown to those who own / have access to an eligible device (n=754). Exact base sizes for specific questions are shown below each chart.

The rise in the use of air cleaning and UV light sanitising devices over the Covid-19 pandemic has slightly increased, the proportion of the UK public who own or have access to an air cleaning device is has seen a small, but statistically significant increase from when this was first asked in wave two (8% W2, 10% W3, 11% W4). This is also the case when looking at and a UV light sanitising device (5% W2, 7% W3, 7% W4). Consistent with wave two and wave three, younger consumers, aged 18 to 29, are the most likely age group to own/ have access to an air cleaning device (17%) or UV device (15%). This is compared to adults aged 30 to 49 (air cleaning device 13%, UV device 8%), 50 to 64 (air cleaning device 8%, UV device 4%) and adults aged 65+ (air cleaning device 6%, UV device 3%). Also consistent with previous waves, respondents from an ethnic minority background are more than twice as likely as white respondents to own an air cleaning device (22% vs 10%) or UV device (19% vs 6%).

The UK public are slightly more likely to have purchased their UV light sanitising device during the Covid-19 pandemic (3%), compared to before (1%). Younger adults, aged 18 to 29 are twice as likely to have purchased a device during the pandemic (6%) than before the pandemic (3%), as are adults aged 30 to 49 (3% during, 1% before). Although, adults aged 50 to 64 and 65+ years are both more likely to have bought theirs before or during the pandemic (both 1% during, 1% before).

Figure 44. Purchase of air cleaning/ UV light sanitising devices



Q: Have you purchased the following for use against bacteria and viruses, including COVID-19?
Base: All respondents (W2=10,296; W3=10,187; W4=10,156)

Of those who have a UV light sanitising device, around three in ten have not yet used their device (29%). Just under one in ten have used theirs in the last two weeks (9%), respondents are generally more likely to have used it four months ago (14%), six months ago (12%) or more than six months ago (13%).

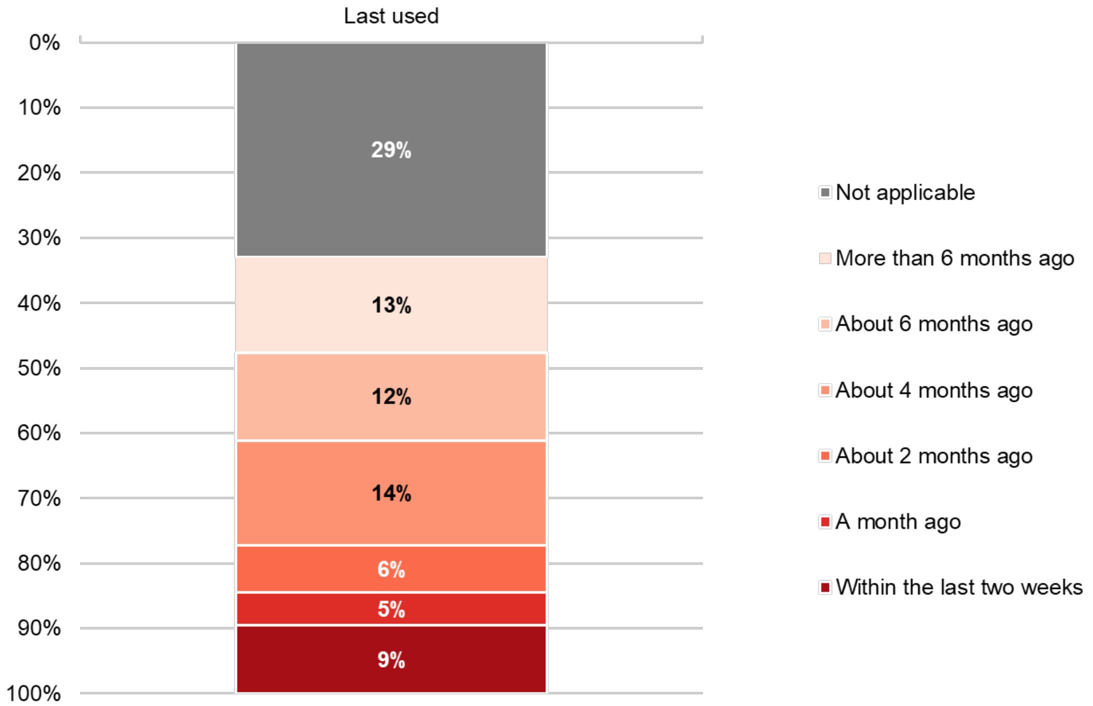
Among those who have access to one, older adults are more likely to reporting having used a UV light sanitising device more recently, with 18% of those aged 65 and over having used one in the last two weeks, compared to younger adults (18 to 29 7%, 30 to 49 8%). While adults aged 50 to 64 are the most likely to have not used one yet (44%), despite having access to/ purchased one.

Respondents with a health condition are as likely as those without a health condition to have access/own a UV light sanitising device (both 7%)

However, those with a health condition are significantly less likely to report that they have not used it yet (24%, compared to 33% of those without a health condition having not used theirs yet)

The offline respondents are significantly less likely than online respondents, to own or have access to either an Air cleaning device (4%; compared to 11% of the online sample) or a UV light sanitising device (4%; compared to 11% of online sample).

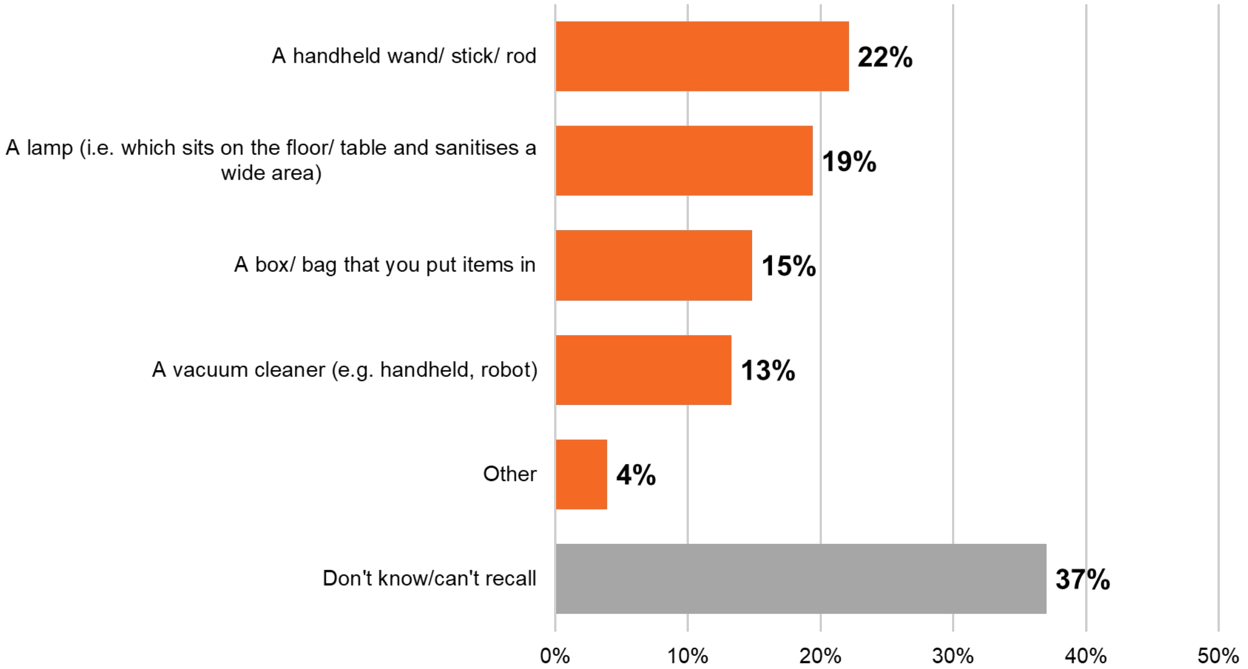
Figure 45. Last used UV light sanitising device



Q:
When was the last time you used a UVC light sanitising device?
Base: All who have access to a UVC light sanitising device (n=680)

Among those who own or have access to a device, the most common type of UV light sanitising device is a handheld wand/ stick/ rod (22%). This is followed by a lamp (19%) and a box/ bag that items are put inside (15%). Over a third of those who have a UV light sanitising device don't know or can't recall what kind of device they have (37%). This suggests there is some confusion around the devices and how they operate and may lead into why many have not yet used their device; adults aged 50 to 64 are the least likely to have used their device yet (44%) as well as the least likely to know what type of device they have (51%, compared to 18 to 29 30%, 30 to 49 41% and 65+ 27%).

Figure 46. Type of UV light sanitising device owned/ have access to



Q: Which type of UV light sanitising device(s) do you have? Please select all that apply.
Base: All who have access to a UVC light sanitising device (680)

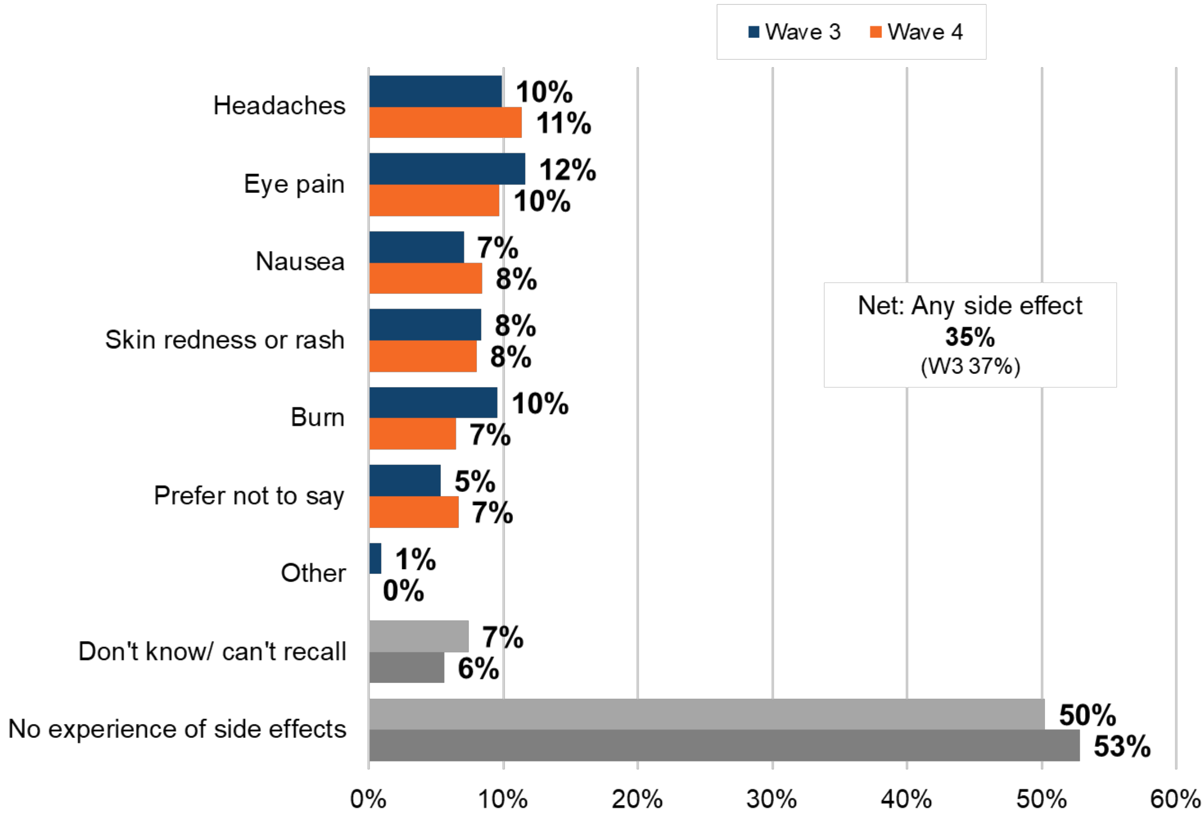
Over a third of those with UV devices (35%) said that they or someone in their household experienced negative side effects either during or shortly after using the device, this is broadly consistent with wave three (37%). However, in wave four the most common side effect is headaches, with just over one in ten of those who have a UV sanitising device experiencing this during or shortly after the device (10% W3, 11% W4), whereas in wave three the most common side effect was eye pain, but this has seen a slight reduction this wave (12% W3, 10% W4).

Of those who experienced a side effect, a fifth (21%) said that the side effect lasted between 10 days and one month and a similar proportion (20%) said that their side effect lasted between one and three months. Those who experienced eye pain as a result of the UV light sanitising device are more likely to have their symptoms last longer than those who experienced headaches; with 22% of those who experienced eye pain having their symptoms lasting between 10 days and one month, compared to 13% of those who had a headache as a side effect of the device lasting for that time period.

A majority of those with UV devices did not read a warning about the UV light sanitising device (51%), compared to only one fifth who report having read a warning (22%). Those who read a warning are significantly more likely to experience a side effect of some kind (48%) compared to 33% of those who had a side effect having not read a warning. This could suggest that those who had a side effect were more likely to be aware of potential side effects and therefore attribute their symptoms to the device.

Older respondents (aged 65+) are the most likely age group to have read a warning on the device (37%; compared to 18 to 29 21%, 30 to 49 21%, 50 to 64 19%). Of those who have read a warning on the device s, 91% read them before or during their first use of the device, with only 8% reading them after their first use.

Figure 47. Side effects caused by UV light sanitising device

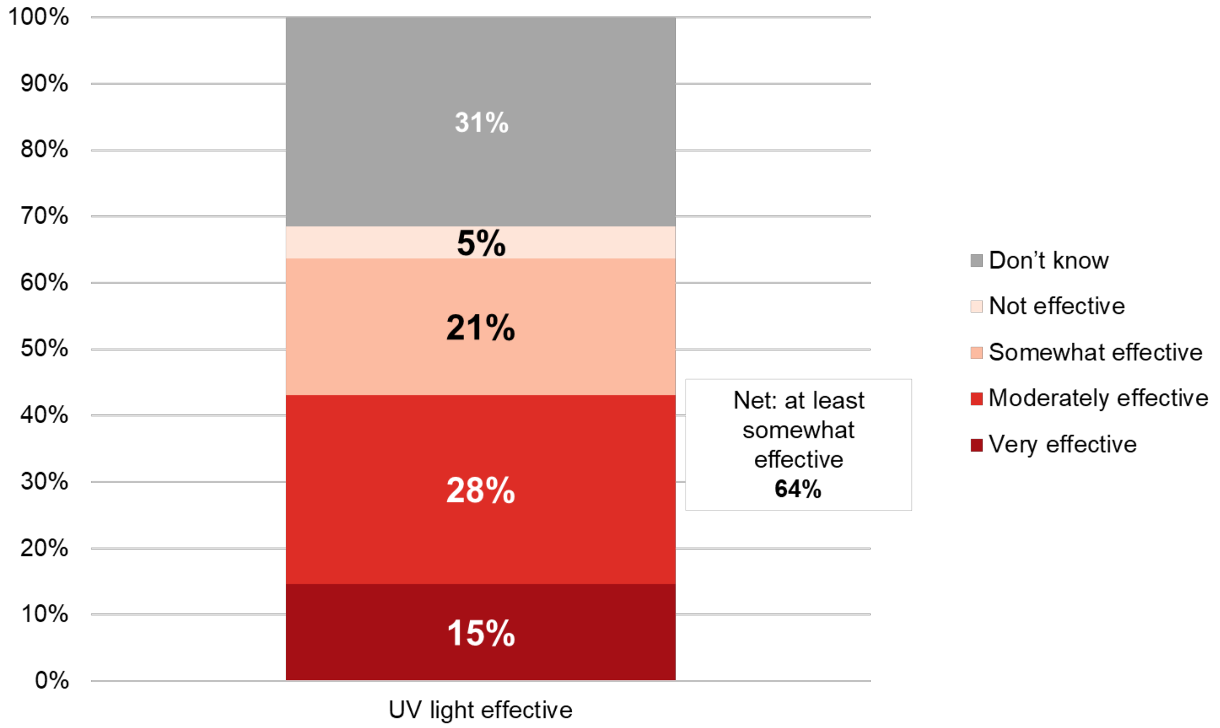


Q: Have you or someone in your household experienced any negative side effects during or shortly after using the UV light sanitising device(s)? Please select all that apply.
Base: All who have access to a UV light sanitising device (w3=625; w4=680)

Of those who use them, only 5% say that they think their UV light sanitizing device is not at all effective. A majority (64%) say that their device is at least somewhat effective, this is mostly driven by those who say that theirs is moderately effective (28%). However, three in ten (31%) say that they don't know whether their device is effective or not.

Younger adults, aged 18 to 29, are the most likely age group to report that their UV light is very effective (23%; compared to 30 to 49 9%, 50 to 64 8%); and 75% of this audience say that theirs is at least somewhat effective.

Figure 48. Effectiveness of UV light sanitising device



Q: How effective do you think the UV light sanitising device is?
Base: All who have access to a UV light sanitising device (680)

Battery storage

In wave four, questions on battery storage were shown to approximately a third of all respondents, allocated randomly (n=3,389). Exact base sizes for specific questions are shown below each chart.

Overall, slightly more than half (52%) of respondents report having not heard of home battery energy storage before taking part in the survey. A similar proportion (45%) were already aware of this technology but do not have it themselves. Awareness of home battery energy storage has therefore increased since the previous wave where this question was included (wave two), where 58% reported being unaware and 39% reported being aware of this technology.

While awareness has risen over time, the proportion who actually use home battery energy storage has not. Just 1 in 25 (4%) own/have access to home battery energy storage in their household, which compares to 3% in wave two, a difference which is not statistically significant.

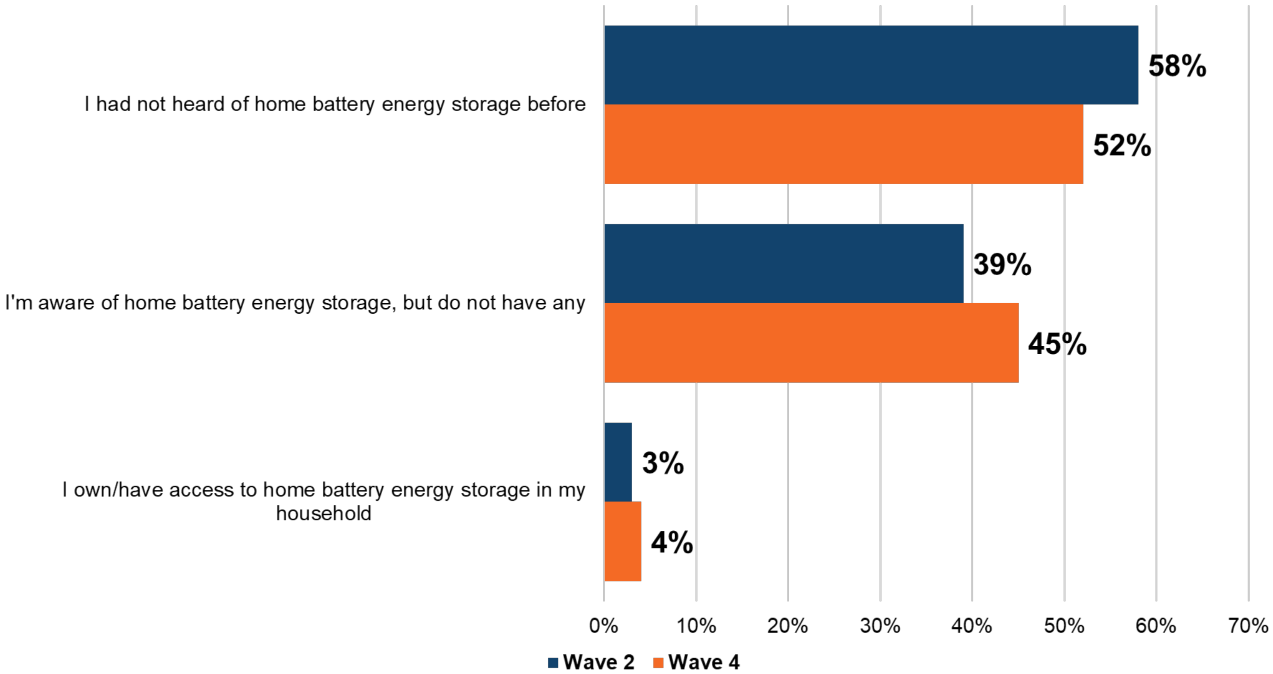
A number of demographic trends are visible in terms of awareness, generally remaining in line with those discussed in wave two. Substantial gender, age and social class divides in awareness remain; men (54%), those aged 65 and older (49%) and ABC1s (48%) are most likely to say they are aware of home battery energy storage but do not have access to any (women: 35%; aged 18 to 29: 38%; C2DEs: 40%). The size of these gaps are similar to that observed in wave two, with awareness rising across all gender, age, and social groups.

Home ownership status is also linked to awareness; nearly half of those who own their home (49%) are aware of home battery energy storage, compared to 38% of renters, although this gap again remains similar in size to that previously measured in wave two. Despite these differences there are no difference among renters and homeowners when looking at those who own or have access to home battery energy storage in their household.

Awareness has diverged further across waves when looking at educational levels. While awareness has risen among those with Medium (46%) and High (51%) levels of educational attainment (up 8 points and 7 points respectively vs. wave two), awareness among those with Low levels of educational attainment (35%) has risen by just 1 point, a statistically insignificant change.

This indicates that while awareness of home battery energy storage has generally risen across the board, this is greater among those with higher levels of education.

Figure 49. 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 batteries and 3D printers section (W2=4,113; W4=3,389)

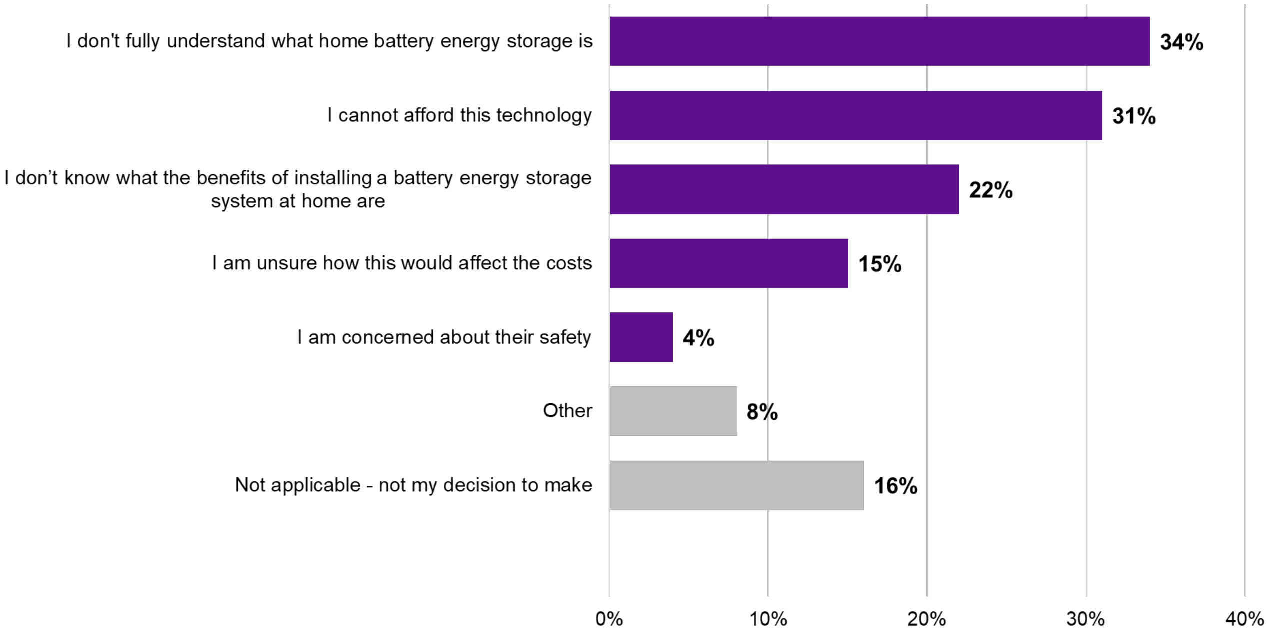
Those who do not currently have home battery energy storage were asked to provide the reasons for this. This is a new question, not included in wave two. The top reason mentioned related to a lack of understanding, with a third (34%) reporting that they do not fully understand what home battery energy storage is. This is followed by three in ten (31%) saying that they "cannot afford this technology", while 22% state that they do not know what the benefits of installing a battery energy storage system at home are. Educating the public about the potential benefits of home battery energy storage is therefore critical to expanding uptake of this technology.

Women (43%) are the group most likely to report that they do not fully understand what home battery energy storage is, with 25% of men mentioning this as a reason. No other significant differences are observable here.

A perceived inability to afford this technology is higher among men (36%; females: 26%), while lack of knowledge about the benefits of is most commonly cited by those aged 6 and over (297%; 18 to 29s: 17%).

It is interesting to note that homeowners are more likely than those who currently rent to cite an inability to afford this technology (homeowners: 34%; renters: 27%), as well as a lack of knowledge of its benefits (homeowners: 27%; renters: 15%).

Figure 50. Reasons for not owning home battery energy storage



Q: You previously said you don't own home battery energy storage. Why is this? Please select all that apply.
Base: All who don't have home battery energy storage (3,276)

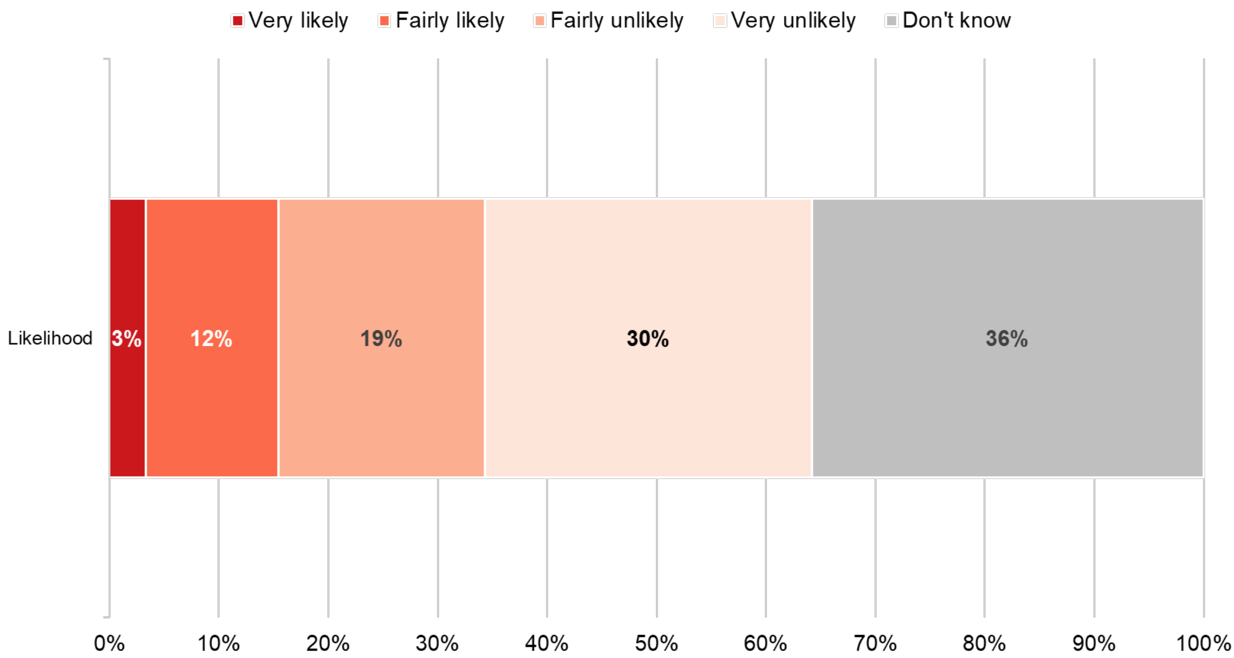
Those who do not currently have home battery energy storage were also asked how likely they were to get it in the next five years. Half (49%) of this group report that they are unlikely to consider this, unchanged from the 51% providing this response in wave two. Those who were aware of this technology before the survey remain significantly less likely to take it up, with 53% of this group saying they were unlikely to do so, compared to 45% of those who were unaware.

Slightly less than one in six (15%) say they are likely to get home battery energy storage in the next five years, the same figure as in Wave two. A little over a third (36%) are unsure (a similar proportion to wave two: 33%). These figures indicate that while awareness has risen slightly, intended uptake has not necessarily followed, likely a result of the high degree of uncertainty which remains regarding the characteristics and benefits of this technology.

Certain demographic variations are again reported, which mirror those observed in Wave two:

Those most likely to say that they are "likely" to consider getting home battery energy storage in the next five years include men (18%; women: 12%), those aged under 65 (17%; over 65s:10%), ABC1s (17%; C2DEs: 13%) and respondents from an ethnic minority background (25%; White: 14%).

Figure 51. Likelihood of getting home battery energy storage in the next 5 years



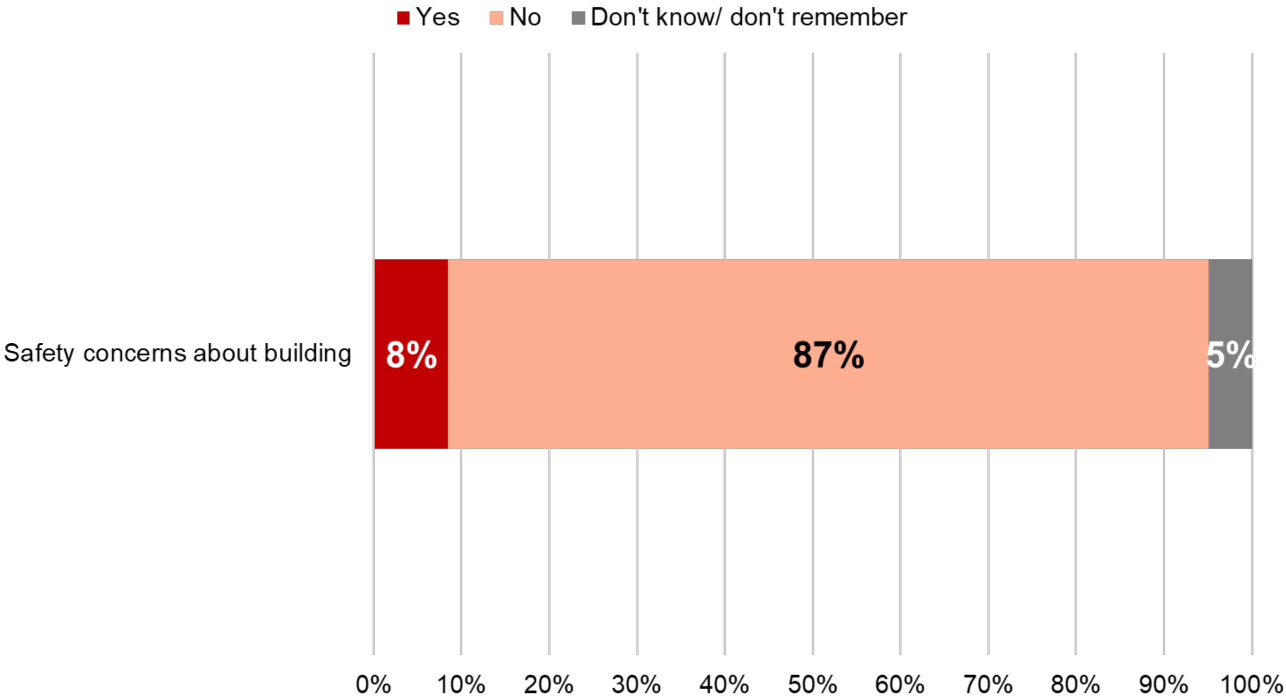
Q: You said you don't have home battery energy storage...How likely are you to consider getting home battery energy storage in the next 5 years (i.e., by 2027)
Base: All who don't have home battery energy storage (W4=3,276)

Construction

In wave four, questions on construction were shown to approximately a third of all respondents, allocated randomly (n=3,375). Exact base sizes for specific questions are shown below each chart.

Wave four also assessed the UK public's attitude towards construction and building safety. The majority report having no concerns about the safety of the building they are living in (87%), compared to a little under one in ten (8%) who do. This is highest among younger respondents, 12% of those aged 18 to 49 report concern, compared to only 5% of 50 to 64s and 4% of those aged 65 and over.

Figure 5211. Concerns over safety of building lived in

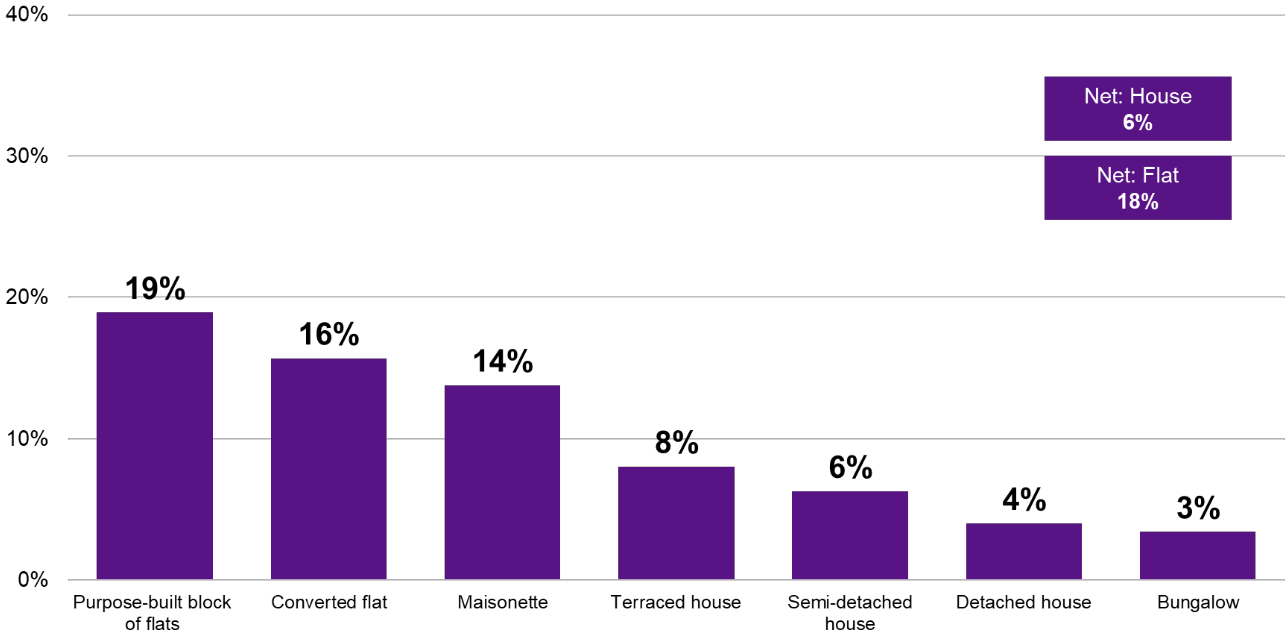


Q: Do you have any ongoing or current concerns relating to the safety of the building you live in?
Base: All in construction section (W4=3,375)

The proportion who report concern is much higher among those who rent their home (14%), compared to those who own (5%). Among those who rent, concern is highest among those who rent from a private landlord (15%) or housing association (14%), compared to those who rent from a local authority (11%).

Likewise, those who currently live in flats (including maisonettes) are more likely than those who live in houses to report having concerns (18% vs. 6% respectively) with concern highest amongst those who live in purpose-built flats (19%). Looking at houses specifically, those living in terraced houses are significantly more likely than those living in detached houses to report concern (8% vs. 4% respectively).

Figure 5312. Concerns over safety of building lived in by building type – those who are concerned



Q: Do you have any ongoing or current concerns relating to the safety of the building you live in?
Base: All in construction section (Purpose built block of flats=394; Converted flat=172; Maisonette=56; Terraced house=717; Semi-detached house=990; Detached house=620; Bungalow=244).

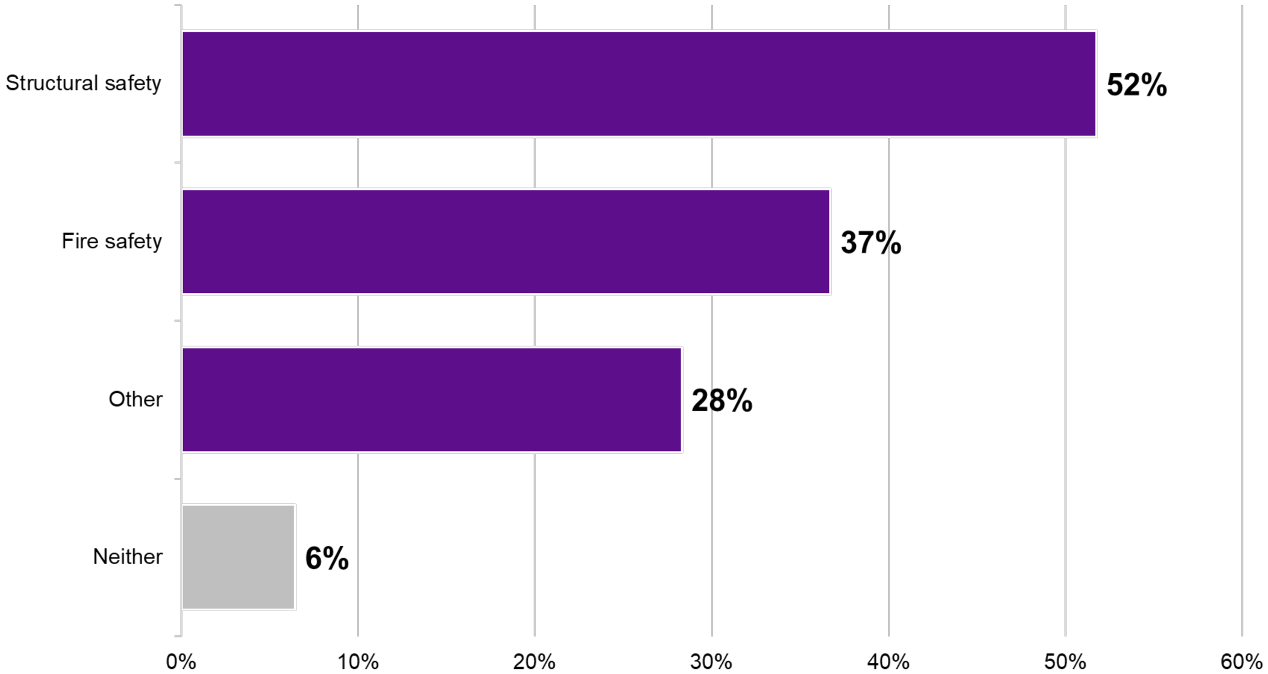
Respondents with a disability are more likely to be concerned about their home compared to those without (12% vs. 7% respectively). This is also the case for those with any health conditions (10%) compared to those with none (7%).

Respondents from an ethnic minority background are also more likely to report concern (17%), compared to white respondents (7%).

The offline sample are less likely to have concerns about the safety of their building; with 2% saying this compared to 8% of the online market.

Among those who report concern, half (52%) report this is due to concerns about the structural safety of the building, while a little under two fifths (37%) have fire safety concerns. Given the smaller sample sizes, there is no statistically significant difference between homeowners and renters' concern for structural safety (49% and 54% respectively) or concern for fire safety (44%, 34%).

Figure 54. Building concerns relating to



Q: Do these safety concerns relate to either of the following?
Base: All in construction section who have concerns about the safety of their building (283)

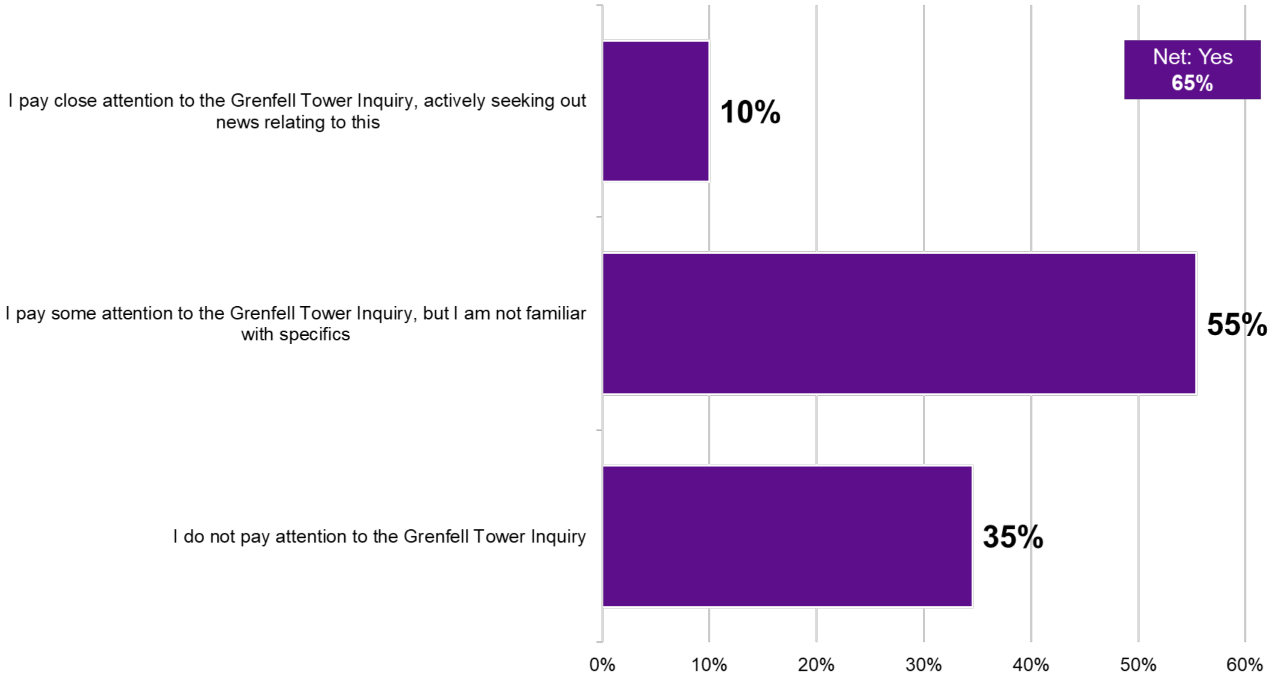
Concerns for structural safety are largely driven by those in houses (59%) compared to those living in flats (43%). Conversely, those living in flats are more likely to report concern about fire safety (46%), compared to those living in houses (29%).

The majority of respondents report paying attention to the Grenfell Tower Inquiry (65%), with one in ten reporting they pay close attention and actively seek out news relating to it (10%). A little over a third (35%) report not paying attention at all.

Renters are more likely than homeowners to have paid close attention to the inquiry (12% vs 9%). Homeowners are more likely to pay some attention but without being familiar with the specifics (58% vs 52%).

Similarly, those who live in flats are more likely to report paying close attention and actively seeking out information (13% vs. 9% of those who live in houses), and this is largely driven by those living in purpose built flats (15%).

Figure 55. Attention paid to the Grenfell Tower Inquiry



Q: Which of the following statements most accurately describes your engagement with the Grenfell Tower Inquiry?
Base: All in construction section (3,375)

Safety gates

In wave four, questions on safety gates were initially shown to all (n=10,156), and subsequently shown to those who currently use a safety gate (n=1,357). Exact base sizes for specific questions are shown below each chart.

7% say that they currently use a screwed-in safety gate at home and a similar number state that they use tension-rod gate (8%).

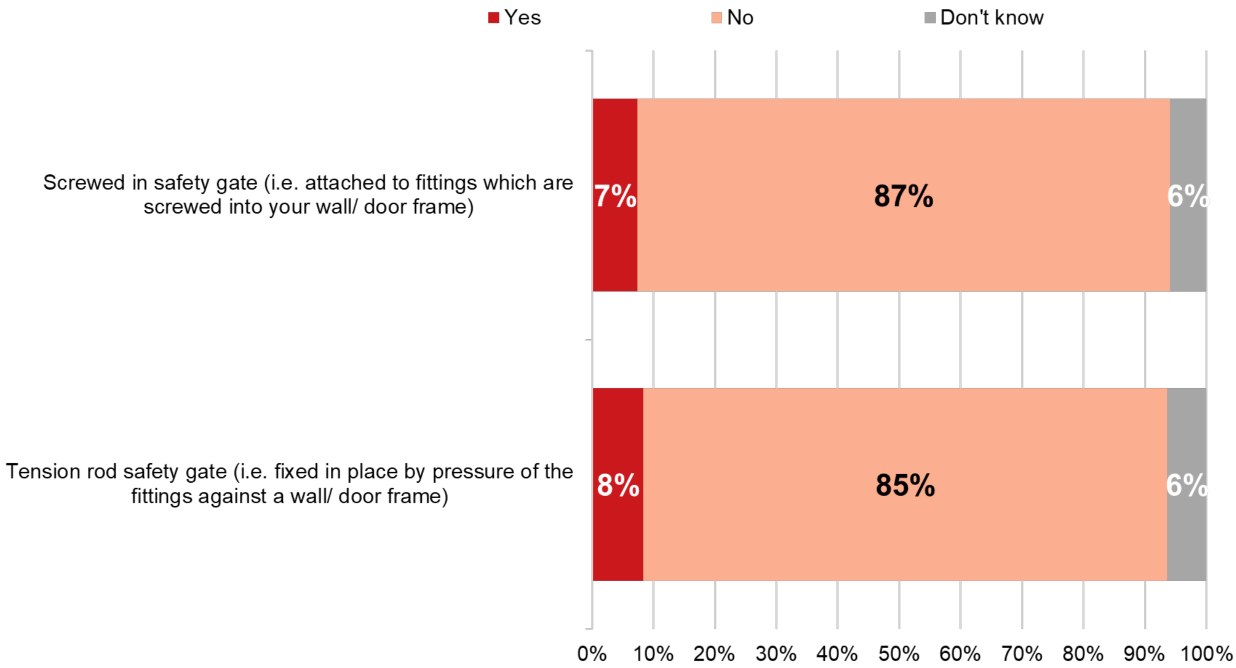
However, among households with a child up to five years old, use for both types of safety gates three in 10 (both 30%). This figure then declines as the age of the child(ren) in the household goes up.

Use of screwed-in safety gates is highest among those living in a purpose-built high-rise block of flats (13%) while use of tension-rod safety gates is highest in semi-detached houses (10%).

Those who are limited a lot by a disability are significantly more likely to use both types of safety gate. 11% of this group said that they currently use a tension rod gate compared to 9% who are limited a little and 8% not limited by a disability. For screwed in safety gates, 12% of those limited a lot currently use this type while 7% of those limited a lot or not limited at all currently do so.

Use of both types of safety gate is significantly higher among ethnic minority respondents. 11% of those from an ethnic minority background state that they currently use a tension rod security gate compared to 8% of white respondents. Similarly, 13% of respondents from an ethnic minority said they use screwed in safety gates compared to 7% of those of a white ethnicity.

Figure 56. Current use of safety gates at home



Q: "Safety gates" may also be called stair gates, baby gates, or pet gates. They are often used to block access to certain rooms/ areas where there may be hazards, such as stairs or a kitchen. Do you currently use either of the following safety gates in your home?
Base: All (10,156)

Of those who currently use a safety gate, 56% said that they use it for dogs or other pets and 52% said that they use it for children. Among households with a child up to 5 years old, 87% said that they use their gate(s) for child(ren) while 26% say the gate is for pets.

While overall use of safety gates is higher among those from an ethnic minority, those who say they use it for dogs and other pets is significantly higher among white people (57%) compared to 49% of those from an ethnic minority. The proportions who say they use it for children is not significantly different across the two ethnic groupings.

4% of those who currently use a safety gate said that they currently stack one safety gate on top of another while 9% said that they have done this in the past. Stacking behaviour does not vary with the purpose of the gate(s) – 5% of those who use them for children currently stack gates, 3% of those who use gates for pets do so.

Those limited a lot by a disability are more likely to say they currently stack their safety gates (11%) compared to 4% of those limited a little and only 2% of those not limited at all.

Most safety gates are bought new (70%) while just under a quarter (24%) said that they purchased their most recent one second hand. Those who use their safety gates for children are more likely to purchase it new (77% vs 66% pets), while those who use it for pets are more likely to receive it second hand (28% vs 19%).

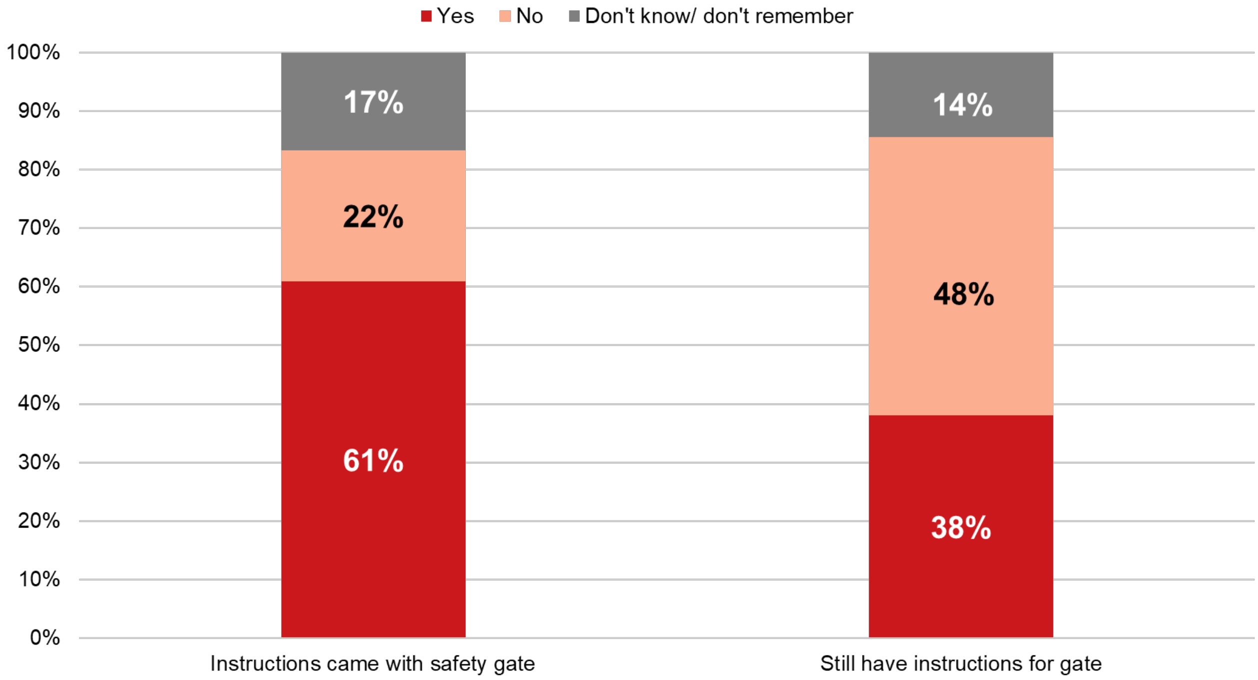
White respondents were more likely to buy new (73%) compared to those from an ethnic minority (58%).

Among those who currently use a safety gate, the majority (61%) recall that it came with instructions while 22% said it did not. Eight in ten of those who bought a new safety gate say it came with instructions (80%), compared to less than one in five who have a second hand safety gate (17%). Of those who said it came with instructions, only 38% say that they still have those instructions while 48% said they do not.

Those aged 18 to 29 are significantly less likely to say they recalled their gate coming with instructions (38%) compared to 68% of 30 to 49 year olds, 66% of 50 to 64 year olds and 69% of those aged 65 and over.

Those from a white ethnic background are also significantly more likely to recall this (63%) compared to 49% of those from an ethnic minority.

Figure 57. Recall of there being instructions with the safety gate / still have the instructions for the safety gate



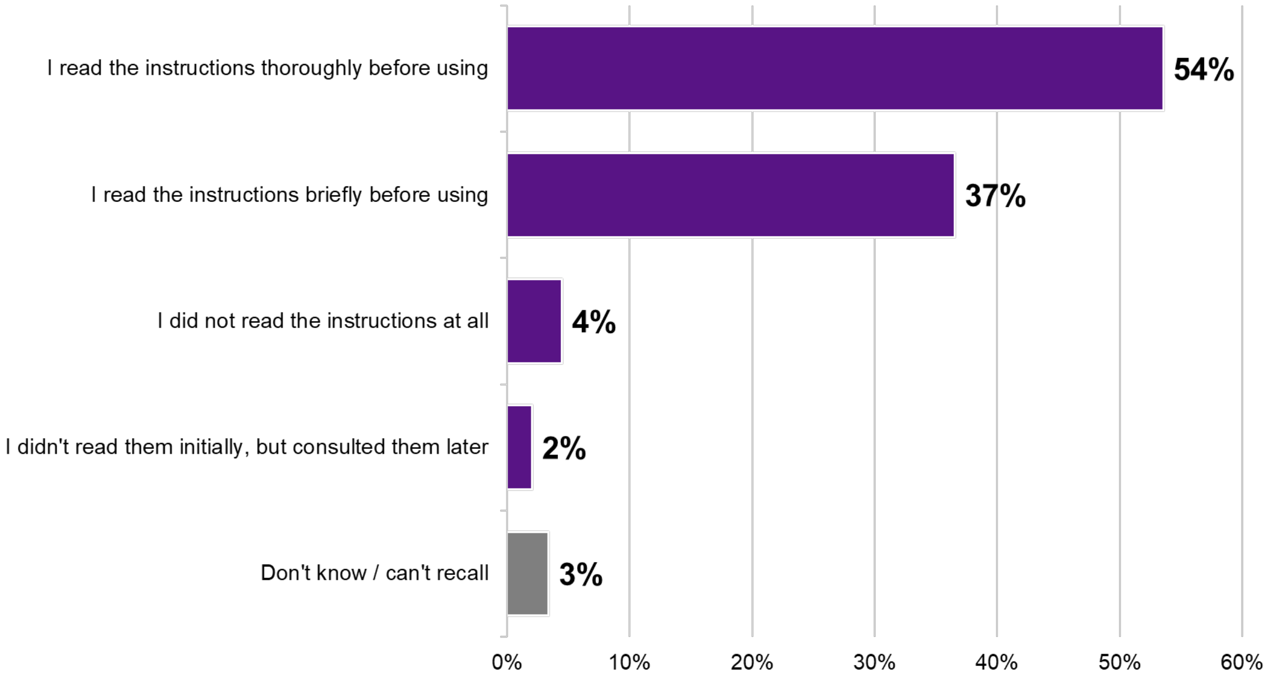
Q. Do you recall there being instructions with the safety gate? TSG7. Do you still have the instructions for your safety gate?
Base: All who currently use safety gate (1,307); Base: All who recall instructions for safety gate (827)

Among those who could recall having instructions for their safety gate, the majority (54%) said that they read the instructions thoroughly before using the safety gate. A further 37%

said that they read instructions briefly before using the gate. 2% said they didn't read them initially but consulted them later to find specific information and another 4% said that they didn’t read them at all. In total, 92% said that they did read the instructions either thoroughly or briefly.

Those using their safety gate for children are more likely than those using it for pets to have read the instructions thoroughly (58% vs 52%). The number who stated that they read the instructions thoroughly increases with age. Among 18 to 29 year olds, only 33% said that this was the case. This figure rises to 53% of 30 to 49 year olds, 60% of 50 to 64 year olds and to 71% among those aged 65 and older. Elsewhere there was little significant differences of interest among the various subgroups.

Figure 58. Read instructions of safety gate



Q. Can you recall whether the instructions were used when first using your safety gate?
Base: All who recall instructions for safety gate (800)

In the qualitative groups, many participants said they were reading and saving safety instructions for the products they purchased. Some participants said that flat pack furniture and other complex products necessitated a more thorough examination of instructions before assembly. Others said they did not need to review instructions for many items they purchased due to the ease of assembly.

When purchasing products for children, participants said they would pay closer attention to instructions or warnings on the product packaging.

“Depends on the product...if it is something I am familiar with like a phone charger definitely not...if it is a new food processor definitely.” Parents w/children under 18, ABC1

"I think if it is something that is perhaps weight-bearing I would certainly read the descriptions over. For instance we got a kids swing out back and I made sure to buy one that was rated for at least two adults." Parents w/children under 18, 2CDE

Many participants said they were inclined to keep instructions after they finished assembling a product. Some said they only keep instructions for expensive or difficult to assemble products. A few said they have been able to find instructions online if the originals were thrown out misplaced.

The availability of online tutorials and resources has lessened the need to keep instructions. YouTube or the product manufacturer's website are often places where additional support can be sourced.

"I've looked up instructions online or searched for YouTube tutorials if the paper/supplied instructions aren't complete or seem incorrect." Parents w/children under 18, ABC1

Cost of living

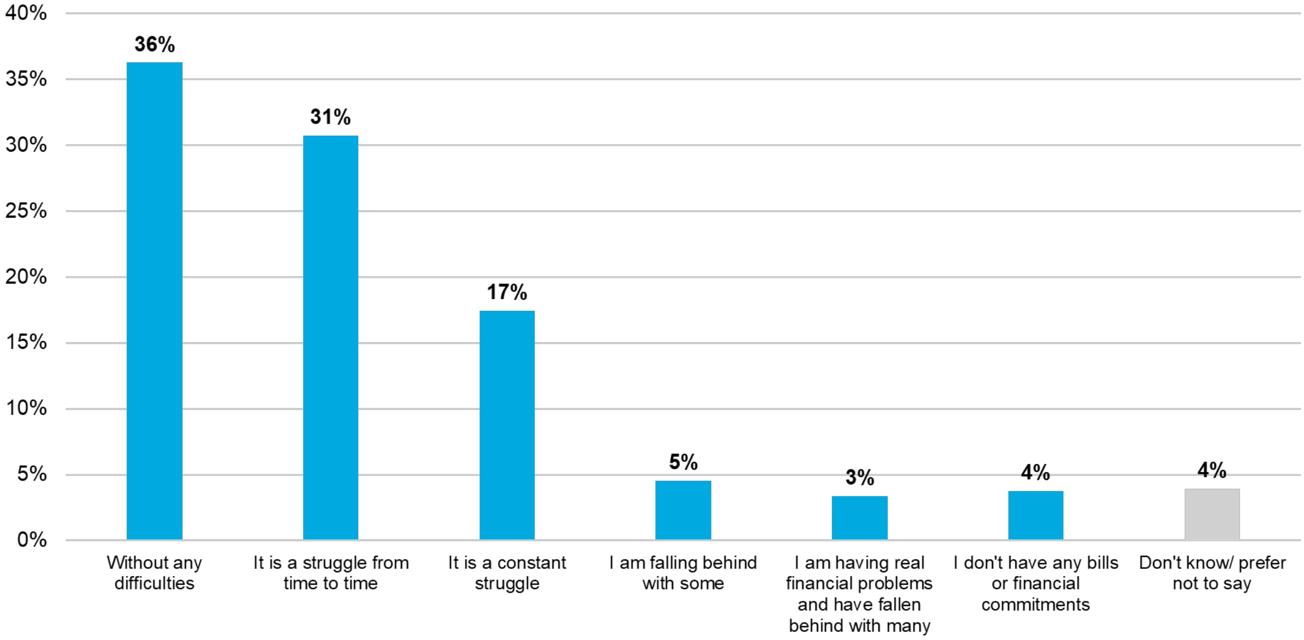
In wave four, questions on the cost of living were shown to all respondents (n=10,156). Exact base sizes for specific questions are shown below each chart.

Given the changes in cost-of-living this year, additional questions were asked this wave to ascertain the impact on UK consumers, and how this has affected their purchasing habits. Overall, the majority (56%) report struggling to keep up with bills and financial commitments, although only a small amount report that they are in real financial problems (3%). Three in ten (31%) state that they find keeping up with bills and financial commitments a struggle from time to time, and 17% report that it is a constant struggle to keep up with. While over a third (36%) in total report that they are able to keep up with bills and financial commitments without any difficulties, this falls to just under three in ten (28%) when looking at those who are currently on any benefits, and a similar proportion (27%) among people whose day-to-day activities are limited at least a little due to a disability. Comparatively, four in ten (40%) of those without a disability report that they can keep up with financial commitments, significantly higher than those with a disability.

Parents are also less likely to report that they are able to keep up with their financial commitments without any difficulties: one quarter (24%) of those who have any children report this, compared to two fifths (41%) of those without children. This is seen further among those who have younger children living in their household, with only a fifth (22%) of those who have children under 5 reporting that they are able to keep up with their financial commitments without any difficulty, and three quarters who report they are struggling financially (74%) Comparatively, a third (35%) of those who have children older than 18 years in their household report they are managing, although six in ten (61%) of parents with older children report that they are struggling financially.

Older respondents aged 65+ are more likely report no financial difficulties (55%) compared to younger respondents aged 30-49 (29%) and 18-29 (24%). There was no significant difference between respondents aged 65+ and those aged 50-64 (37%).

Figure 59. Keeping up with bills and financial commitments

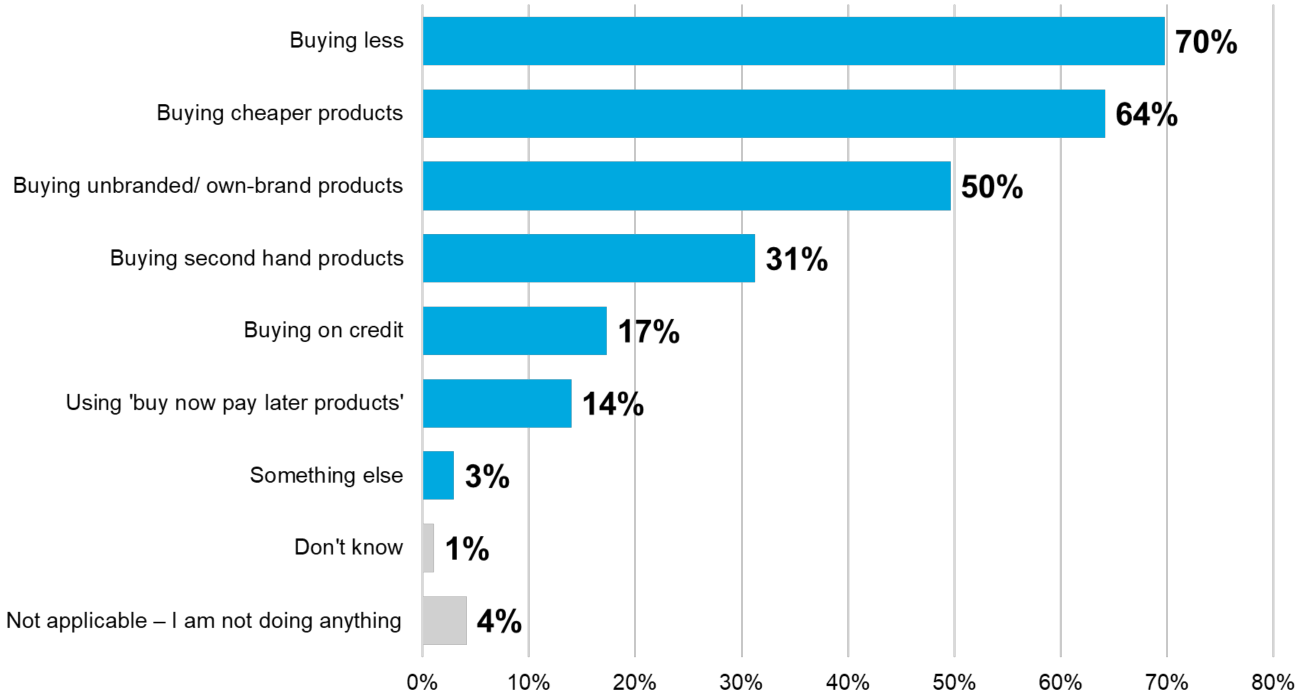


Q. Which one of the following statements BEST describes how well you are keeping up with your bills and financial commitments at the moment?
Base: All Wave 4 (n=10156)

Those who previously reported at least some financial difficulties were asked what steps they are taking to manage their financial commitments when buying products. The majority (70%) reported that they were buying less. Other methods to reduce spend are spending less on products with 64% buying cheaper products, 50% buying unbranded products and 31% buying second hand products. A smaller proportion are buying on credit (17%) or using ‘buy now pay later’ products (14%).

Those who report they are able to keep up with their financial commitments but that it is a struggle from time to time, are less likely to report buying on credit (13%) or using ‘buy now pay later’ products (10%), compared to those who are having real financial problems (23% buying on credit, 22% using ‘buy now pay later’ products). However, those who are keeping up with their financial commitments but find it a constant struggle are the most likely to report that they are buying less (75%), compared to those who are struggling from time to time (68%) or those who are falling behind on financial commitments or having real financial problems (both 64%). This could suggest that those in more difficult financial positions are unable to take further steps to reduce spend when buying products.

Figure 60. Managing financial commitments



Q. You previously said you are at least struggling somewhat with keeping up with bills and financial commitments.When you are buying products, which if any of the following are you doing to manage this?
Base: All who are finding it difficult to cope on present income Wave 4 (n=5685)

The cost-of-living crisis affected a significant number of participants in the qualitative focus groups. The cost-of-living crisis has made participants anxious and worried about the coming months. Especially with winter in the distant future, participants said they feared the rise of utility costs and what that might do to their budgets.

Participants said they were dealing with household budgetary implications that impacted their daily routines and shopping habits. To counter the rising cost of goods and services, participants said they were buying less and buying cheaper products, particularly cleaning products.

Money was particularly tight for some people and participants in the C2DE segments. Although the rise in cost of living impacted most, some said they were fortunate not to be affected by inflation or other rises in the costs of goods.

“We’ll definitely be changing the activities we do during the impending summer holidays. Much more time at home/just meeting friends or anything free.” (Parent w/children under 18, ABC1)

“It has been tough and at the end of the month I am always tight with money. I have noticed the increase in petrol, energy and grocery shops and have tried to cut back where I can.” (Parent w/children under 18, ABC1)

“Good luck to everyone here ahead of the next rise in utility costs. It's going to be a bleak winter, I wish you all the best.” (18-40-year-old, C2DE)

"I'm using every avenue to save money, buying off-brand stuff, using those pay-in 3 things, buying fewer nonessentials." (18-40-year-old, C2DE)

"We tend to buy second-hand anyway, we have a fantastic age concern warehouse here and I wish we had known about them when we started out as a couple and a kid we could have saved so much." (18-40-year-old, C2DE)

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