Office for Product Safety & Standards

OPSS Product Safety and Consumers: Wave 6

DBT Research Paper

November 2024

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Background

The Department for Business and Trade (DBT)[1] has policy responsibility for consumer product safety. To that end, the Office for Product Safety and Standards (OPSS) was established by the previous Department for Business Energy and Industrial Strategy (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 sixth wave of tracking, including comparisons against the previous waves where applicable. The report also includes an exploration of key topical policy areas including online purchases, personal light electric vehicles, night wear, and metrology.

[1] The Department for Business and Trade was established in February 2023, absorbing the OPSS from the former Department of Business, Energy, and Industrial Strategy (BEIS)

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 10,216 people from across the United Kingdom (UK) collected through online research methods. Fieldwork was carried out between 16th June and 3rd July 2023. A supporting survey of 252 people who are very low or non-internet users was conducted via telephone between 29th June and 19th July 2023.

Where appropriate, comparisons have been made with survey data from previous waves. 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 all waves of the survey are listed below:

	Online survey	**Offline survey**
Wave one	10,230 UK adults, 17th to 30th November 2020	512 offline adults, 23rd November to 12th December 2020
Wave two	10,296 UK adults, 17th May to 15th June 2021	251 offline adults, 3rd to 28th June 2021
Wave three	10,187 UK adults, 23rd November to 14th December 2021	251 offline adults, 25th November 2021 to 5th January 2022
Wave four	10,156 UK adults, 22nd June to 5th July 2022	252 offline adults, 6th July to 28th July 2022
Wave five	10,182 UK adults 23rd November to 11th December 2022	250 offline adults, 24th November 2022 to 3rd January 2023
Wave six	10,216 UK adults 16th June to 3rd July 2023	252 offline adults 29th June to 19th July 2023

After the close of the online survey, 4 text-based online focus groups were conducted with survey participants. Participants had a mix of PLEV ownership, and the final group was conducted with those who experienced issues with their PLEV.

- **G1:** ***10 participants*** - 3 participants had e-bikes, 5 had e-scooters, 2 had both (e-scooter and e-bike)
- **G2:** ***8 participants*** - 7 participants had e-bikes, 1 had an e-scooter
- **G3:** ***9 participants -*** 5 participants had e-bikes, 3 had a hoverboard, 1 had both an e-scooter and hoverboard
- **G4:** ***9 participants*** – all had issues with their PLEV; 2 participants had e-bikes, 1 had both e-bike and e-unicycle, 3 had e-scooter, 1 had both e-scooter and e-bike, 1 had a hoverboard

We also included a mix of age, social grade, genders, ethnicities, and locations. There were between 8-10 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.

Focus groups were conducted in July and August 2023.

Guidance on analysis

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. This analysis may be highly correlated with other findings in the data (for example, LGB+ respondents are more prevalent in younger age 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.

Where a question has been asked for four or more waves, only the most recent four waves are included in charts/ images. Figures in charts/ images may not sum to 100% due to rounding or due to the question allowing multiple selections.

Findings from the low/ non-internet users are noted as “the offline survey” or “offline adults”. 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; due to the difference in methodology from the online survey, comparisons are not statistically reliable.

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.

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.

Key findings

Perceptions of Safety

- Under half (46%) of the UK public feel that the current system of product safety regulations ensures that products they purchase are ‘completely’ or ‘a great deal’ safe.
- Product safety remains a factor which is not generally considered a priority by the majority when purchasing a product, with around one in ten reporting they consider this (8%).
- When thinking about large domestic appliances and electrical appliances, the running cost is also a prominent factor for consideration. For large domestic appliances, a fifth (19%) of those asked report that they considered this before purchasing, whereas for electrical appliances only 3% consider the running costs when considering purchasing.
- When looking at trust in different organisations, trust is highest for consumer protection bodies (72%). Retail outlets have a high level of trust, with second-hand shops most likely to be seen as trustworthy (64%), and physical store retail outlets and online retail outlets are trustworthy (53% for physical outlets, 50% for online outlets). Online marketplaces are seen as less trustworthy, with 42% feeling they are trustworthy and 34% saying they are neither trustworthy nor untrustworthy.
- A previous experience of buying a product remains the most commonly cited factor that builds trust in a product being safe (44%).

A focus on online purchasing

- All but one of the types of online retailer listed have seen a significant increase in the proportion saying that the products they sell are generally safe. Amazon (84%) and individual manufacturer websites (79%) have the highest perceived safety levels.
- Caution around the safety of products purchased online varies by product type – phone chargers (57%), washing machines (52%) and vacuum cleaners (48%) prompt the highest levels of caution of those listed.
- Likelihood to purchase online varies widely by product category. Electrical appliances (51%) and large domestic appliances (48%) are the categories people are most likely to report buying the majority online, while only one in five buy most of their homeware (21%) or cosmetics (17%) online.
- The proportion who purchased something from a third party on an online marketplace in the last six months is 67%, a seven percentage point increase since last measured in wave four. Nearly three in ten (28%) have sold something online, statistically unchanged since last measured.
- eBay remains the most popular online marketplace for both buying (37%) and selling products (12%).

A focus on second-hand purchasing

- A majority (72%) of the UK public report that they would be likely to buy at least one of the types of products listed, second-hand.
- Clothes/ clothing accessories are the most common item the UK public say they would be likely to purchase (42%). This is followed by furniture/ furnishings (36%) and sports a leisure items (34%).
- The items least likely to be purchased second-hand are cosmetics items (3%).
- The top three places the UK public would be likely to purchase second-hand items are charity shops (76%), online marketplaces e.g. Amazon, eBay, Etsy etc. (66%) and online community buy and sell pages e.g. social media community groups such as Facebook Marketplace, Gumtree etc (55%).
- Just under seven in ten (68%) say they always consider the safety of the product they are buying second-hand.
- The most common way respondents check the safety of second-hand items is checking reviews and feedback on the seller (52%).

Experiences of safety issues

- Of respondents who bought a product in the last 6 months, one in ten (10%) report experiencing a safety issue of some kind.
- Those who bought a musical instrument are the most likely to experience a safety issue (31%), with reported incidence steadily rising since wave one (6%).
- Issues with large domestic appliances have risen in seriousness, now with an average rating of 6.1 out of 10.
- The most common impact of a safety issue remains distress (24%), although damage to property/ other items has risen (19%).
- Most people do take action as a result of a safety issue. Overall, 77% took action with a safety issue in any product category, the highest proportion since tracking began.
- Not knowing what to do has sharply risen as the reason people did not take action – from 6% in wave five to 17% in wave six.

Perceptions of product registration

- Most people are comfortable with automatic registration at the point of purchase (66%), consistent with previous waves.
- There has been a particular rise in the comfort with automatic registration at the point of installation (62% in W4, compared with 68% in W6).

Perceptions of safety

In wave six, questions on perceptions of safety were shown to all respondents (n=10,216). Exact base sizes for specific questions are shown below each chart.

Key findings

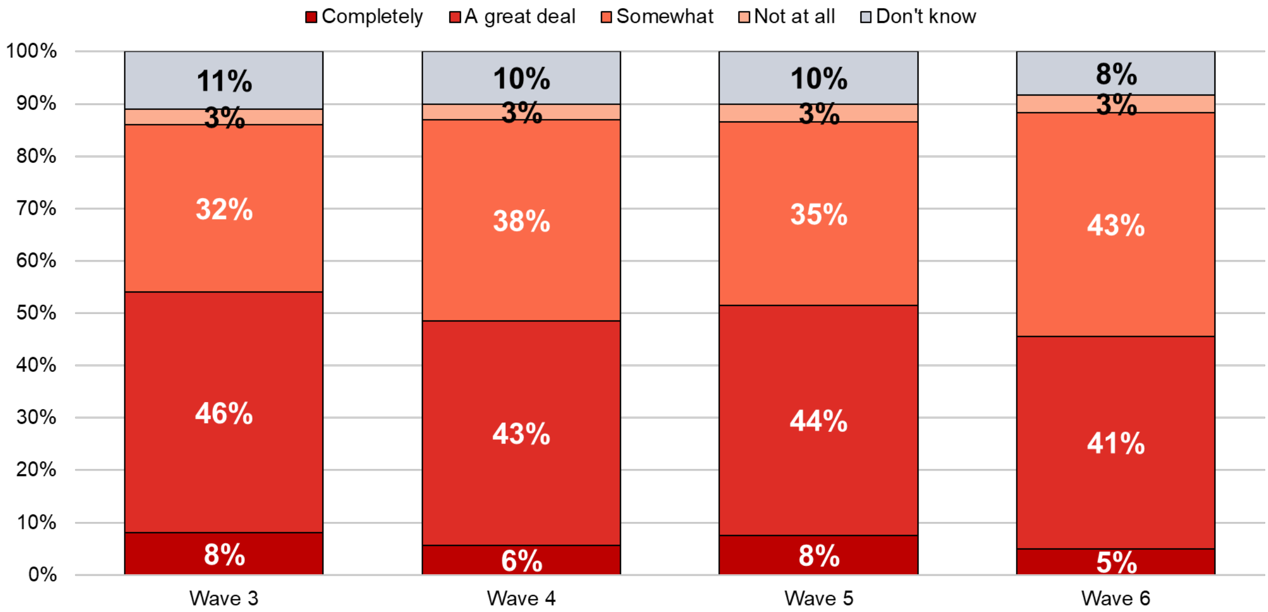
- The proportion of UK adults who feel that the current system of product safety regulations ensures that products they purchase are 'completely' or 'a great deal' safe has fallen – under half (46%) now believe this.
- However, UK adults continue to expect a product to be safe regardless of the price they paid (83%) and believe that regulations ensure products sold in the UK are generally safe (72%).
- Product safety is rarely a top factor for people in their purchase of a product; just under one in ten report considering this (8%), consistent with previous waves. It continues to be a more common consideration for baby products and toys than other categories.
- The key factor driving trust in a product being safe remains previous experience (44%), now at its highest level since polling began.
- The public continue to trust consumer protection bodies (74%), while attitudes to government remain low (27% trust local government, 21% trust UK government departments).

The UK system for regulating product safety

Under half (46%) of the UK public feel that the current system of product safety regulations ensures that products they purchase are 'completely' or 'a great deal' safe. This has dropped to lower levels than previous waves and is even below the previous record dip in wave four (49%). The change is due to the proportion of people saying they feel that they 'somewhat' ensure safety (43%), which is higher than previous waves. The proportion who feel that the current system does not ensure safety at all is consistent at 3% and this proportion has remained stable in the last four waves.

Unlike previous waves, younger people are more likely to feel that the UK system for regulating product safety can ensure product safety 'completely' (7% of those aged 18 to 29, 5% of those aged 30 to 49, 5% of those aged 50 to 64). Those aged 65 and over are the least likely to feel that the UK's product safety regulation ensures that products are 'completely' safe (3%). Consistent with previous waves, those in higher social grades (ABC1) are more likely to feel that the current system is able to ensure safety completely or a great deal (47%), compared to C2DE's (44%).

Figure 1. Extent that 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 (W3=10,187, W4=10,156, W5=10,182; W6=10,216)

Factors that influence perceptions of safety and product purchasing

When asked about the top three features considered when purchasing a product, the purchase price remains the factor chosen by the most UK consumers (60%). Quality comes in second, with 39% taking this into account. The uplift in consideration of quality seen in wave five has not been sustained (41%), with figures more aligned with wave four (38%).

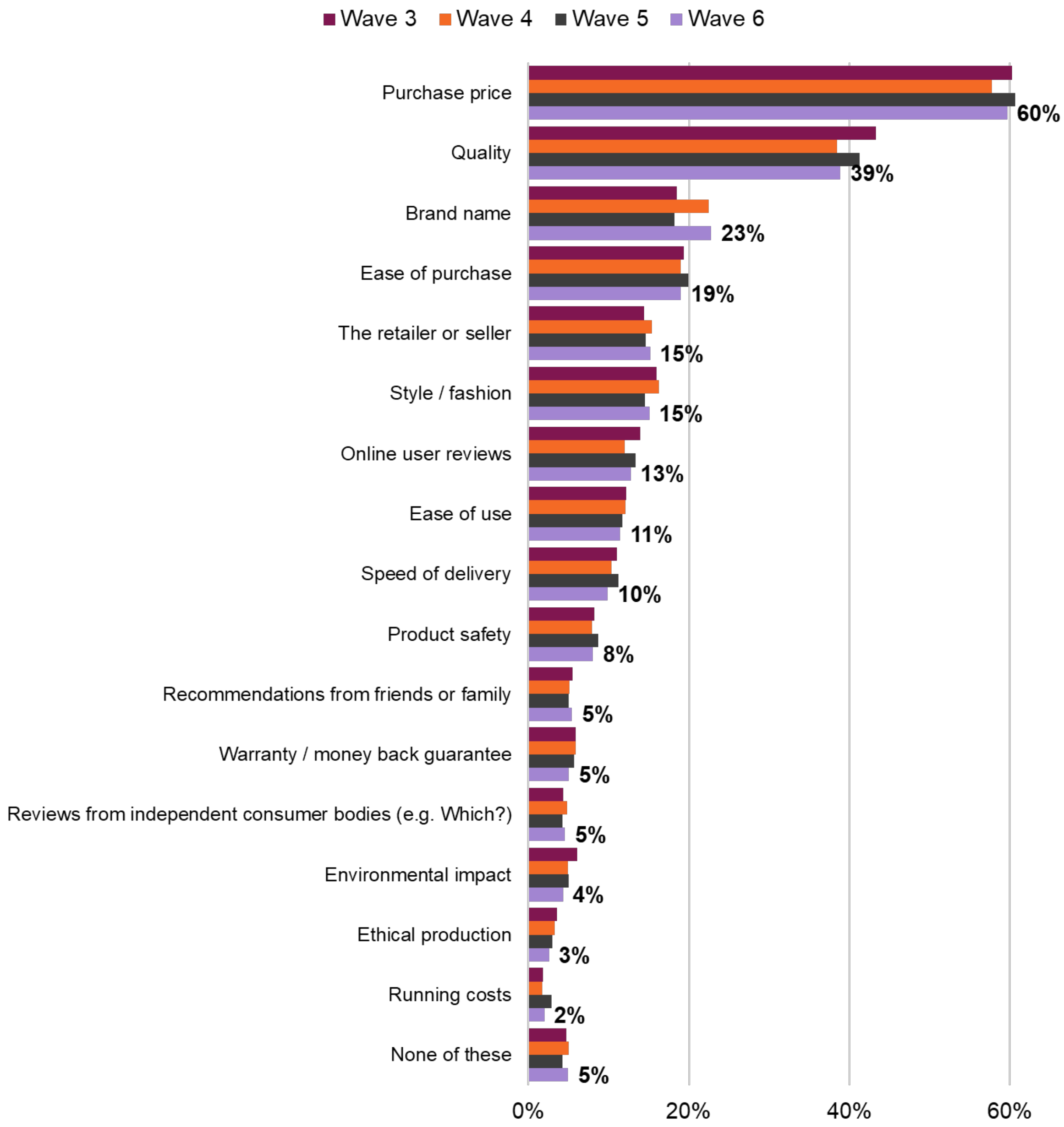
There is now no difference in consideration of quality between those with children in their household and without (both 39%). However, those with children in their household are now less likely to consider price (58%) as a top consideration than those without children in the household (60%).

Product safety continues to be a factor that is rarely taken into account when purchasing a product; just under one in ten report that product safety was one of their top three considerations when making a purchase (8%). Consistent with previous waves, women remain more likely to consider safety than men (9%, compared with 7% of men).

Ethnic minority members of the public are less likely to consider price making a purchase (54%, compared with 60% of white respondents).

Those with an ethnic minority background are more likely to consider reviews from independent consumer bodies (6%, compared with 4% of white respondents).

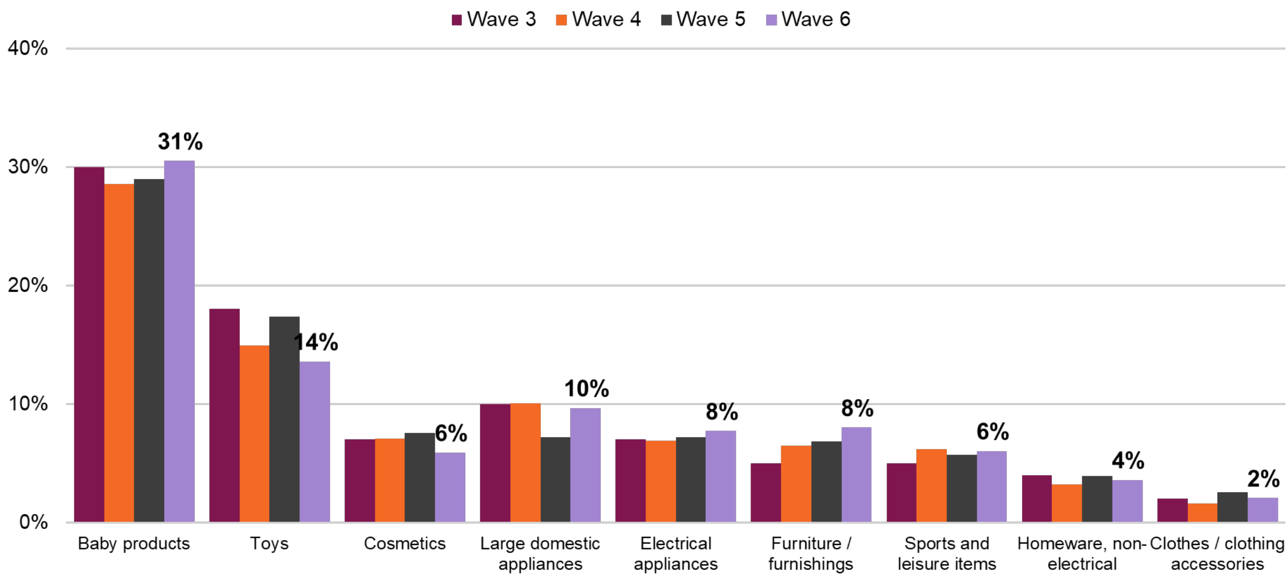
Figure 2. Factors taken into account when considering purchasing a product



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 (W3=7,667; W4=7,577, W5=8,407; W6=8.036)

The importance of product safety, when looking at products purchased, varies by the product being considered. Those considering baby products are the most likely to say they prioritised product safety (31%), followed by those purchasing toys (14%). This is consistent with previous waves. Product safety is less often a top three concern when buying clothes or non-electrical homeware (2% for clothing, 4% for non-electrical homeware).

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

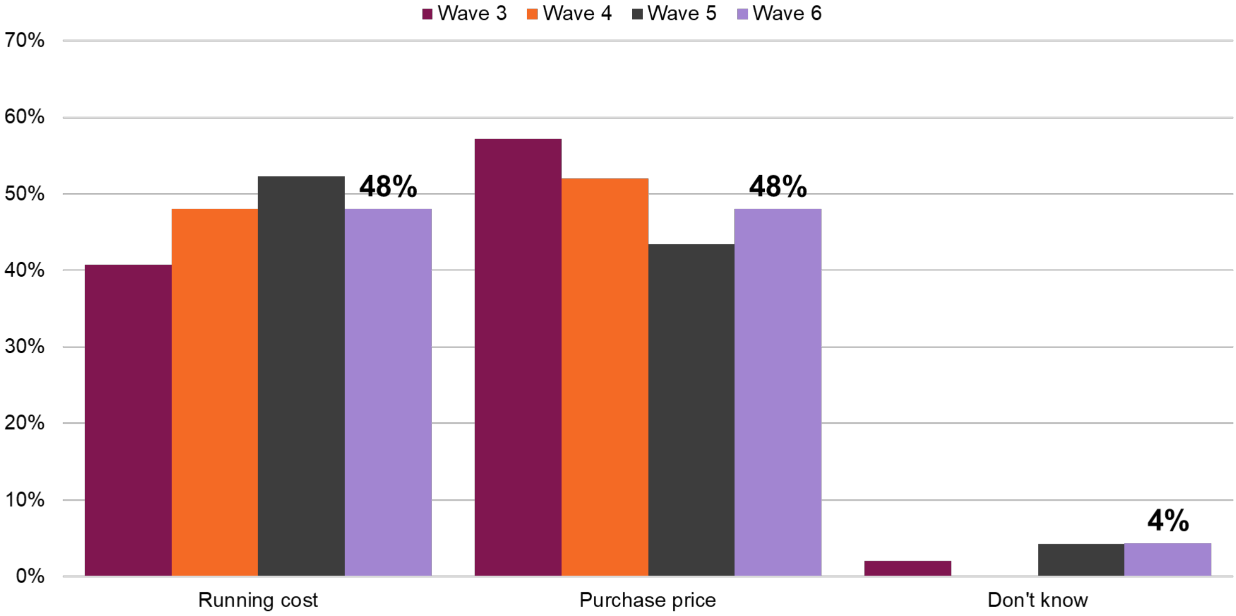


Q: Which, if any, of the following did you take into account when you were considering buying the [product]? (Please select the THREE most important factors)
Base: Asked about a product (in wave six: baby products=421; toys=875; large domestic appliances=678; electrical appliances=1,040; cosmetics=1,308; sports and leisure items=854; furniture/ furnishings=934; homeware=639; clothes/ clothing accessories=1,287)

When thinking about large domestic appliances, the running cost is also a prominent factor for consideration; a fifth of those reflecting on large domestic appliance purchases report that they considered this (19%), whereas for electrical appliances only 3% consider the running costs.

Across all product categories, those who considered both purchase price and running costs were asked which they felt was more important. Consumer are now split on this – around half feel that running cost was the more important of the two considerations (48%) and the same proportion say that the purchase price was more important. This may appear to have been an increase since 41% selected running costs in wave three, when the question was first asked, but the difference is not significant. Similarly, there has been no significant shift across the duration of tracking for thinking purchase price is the more important factor.

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 [product]. 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; W5=138; W6=88)

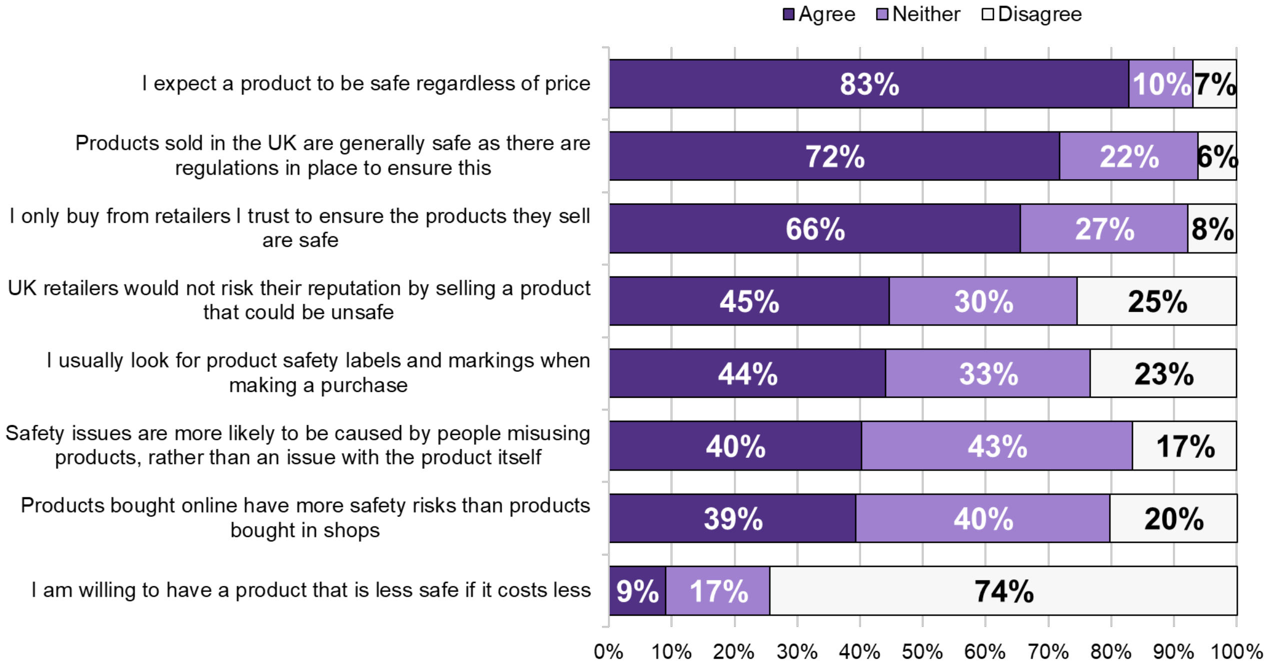
The UK public continues to expect a product to be safe regardless of the price they pay for it (83%), consistent with previous waves. This attitude is more commonly held among older adults compared to those under 30 (79% of those aged 18 to 29, 83% of those aged 30 to 49, 84% of those aged 50 to 64, 85% of those aged 65).

With a similar perspective, three quarters (74%) 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 and 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. Both of these are consistent with the proportions seen in wave four.

Two-fifths (40%) agree that safety issues are more likely to be caused by people misusing products rather than an issue with the product itself, level with previous findings. This belief is more commonly held among those with low (43%) and medium (41%) levels of education compared to those with high levels (37%).

A similar proportion think that products bought online have more safety risks than those bought in-store (39%), this is consistent with previous waves. Younger respondents appear to be more cautious when thinking about online purchases: agreement increases to 45% among those aged 18 to 29, significantly higher than all other age groups (38% of those aged 30 to 49, 38% of those aged 50 to 64, 39% of those aged 65+).

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 (W6=10,216)

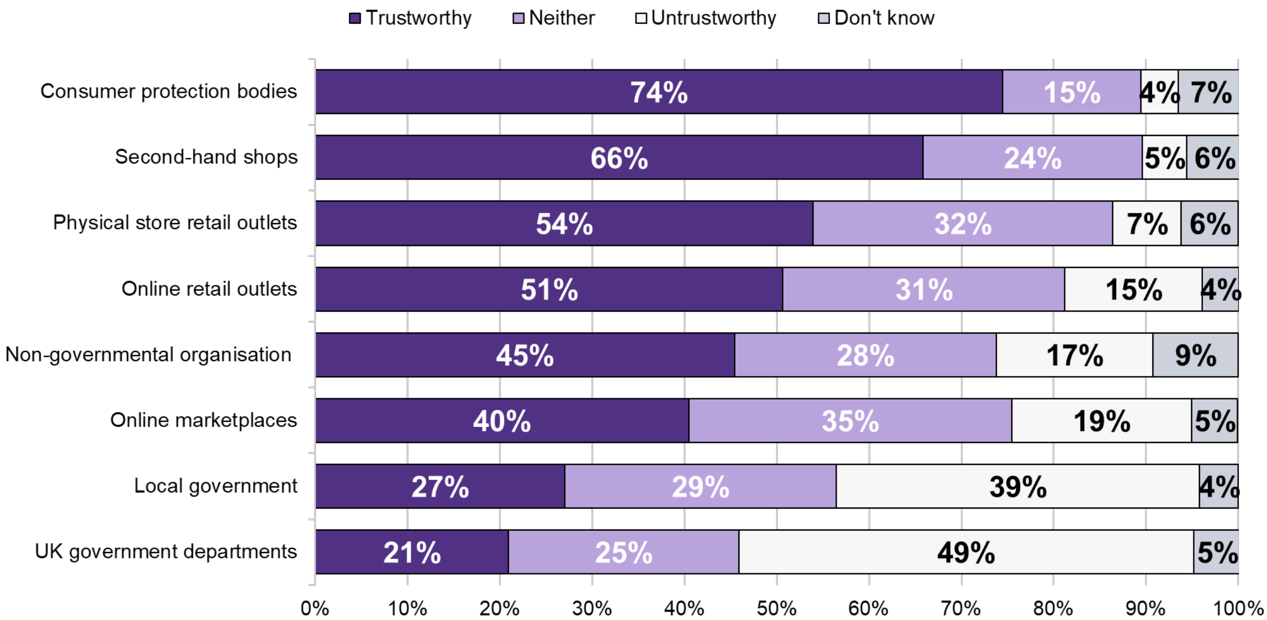
Trust in organisations associated with product safety

The UK public were asked how trustworthy or not they feel organisations relating to product safety are, including consumer protection bodies, retailers, government departments and other non-governmental organisations.

Trust is highest for consumer protection bodies (74%). This is maintained from the last wave (74%) after dropping down from its highest point in wave one (79%). Retail outlets have a high level of trust, with second-hand shops most likely to be seen as trustworthy (66%), while over half of the UK public feel that physical store retail outlets and online retail outlets are trustworthy (54% physical outlets, 51% online outlets). Online marketplaces are seen as less trustworthy than other retailers, with just 40% of UK adults saying they are trustworthy.

Attitudes towards government departments continue to fall. They were highest when tracking began, but now only around a quarter trust local government (41% in W1, compared with 27% in W6), and a fifth trust government departments (34% in W1, compared with 21% in W6).

Figure 6. 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, W5=10,182; W6=10,216)

Those aged 18 to 29 are least likely to trust online marketplaces (22% consider them untrustworthy). They are also most likely to use them (45% of those aged 18 to 29, 41% of those aged 30 to 49, 39% of those aged 50 to 64, 37% of those aged 65+). This may be due to greater regularity in using online marketplaces among younger people, meaning they are more likely to have formed an opinion one way or the other.

At a total level, there are lower levels of trust in governmental bodies, including local government (27%) and UK government departments (21%) – but both are a reduction with the proportions seen in wave 5 (33%, 27% respectively). Trust in UK government departments remains higher amongst high social grades (23% of ABC1, compared with 18% of C2DE), but is still a reduction from the previous wave (W5: 30% of ABC1, compared with 24% of C2DE).

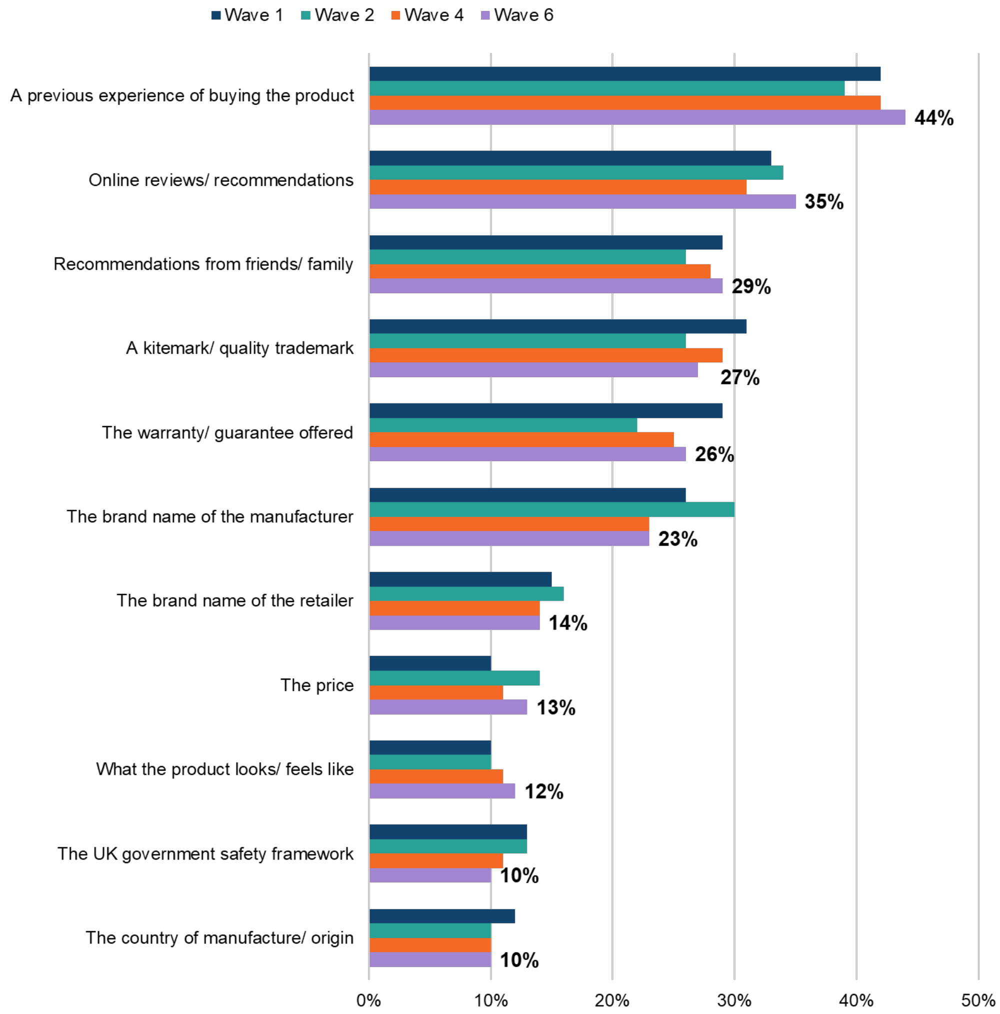
Men are more likely to trust UK government departments (18% of women, compared with 24% of men) while women are more likely to feel consumer protection bodies are trustworthy (76% of women, compared with 73% of men).

Trust in UK government departments is also higher for those from an ethnic minority background (30%, compared with 20% of white respondents).

A previous experience of buying a product remains the most commonly cited factor that builds trust in a product being safe (44%). This represents a slight increase from previous waves. Other factors such as online reviews (35%), and recommendations from friends and family (29%) are also important in trusting in a product.

Comparatively, the brand name of the manufacturer has continued to retain lower importance – with 23% mentioning this, which is in line with wave four, but remains well below wave two. Indeed, overall branding has not recovered its importance this wave, with the brand name of the retailer remaining steady with wave four but still lower than wave two (14% in W4, 16% in W2).

Figure 7. 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, W4=10,156; W6=10,216)

A focus on online purchasing

In wave six, questions on online purchasing were shown to approximately half of all respondents, allocated randomly (n=5,159). Exact base sizes for specific questions are shown below each chart.

Key findings

- All but one of the types of online retailer listed have seen a significant increase in the proportion saying that the products they sell are generally safe. Amazon (82%) and individual manufacturer websites (79%) have the highest perceived safety levels, though only around one in ten perceive AliExpress (9%) or Wish (11%) to be safe.
- Caution around the safety of products purchased online varies by product type – phone chargers (57%), washing machines (52%) and vacuum cleaners (48%) prompt the highest levels of caution of those listed.
- Likelihood to purchase online varies widely by product category. Electrical appliances (51%) and large domestic appliances (48%) are the categories people are most likely to report buying the majority online, while only one in five buy most of their homeware (21%) or cosmetics (17%) online.
- The proportion who purchased something from a third party on an online marketplace in the last six months is 67%, a seven percentage point increase since last measured in wave four. Nearly three in ten (28%) have sold something online, statistically unchanged since last measured.
- eBay remains the most popular online marketplace for both buying (37%) and selling products (12%).

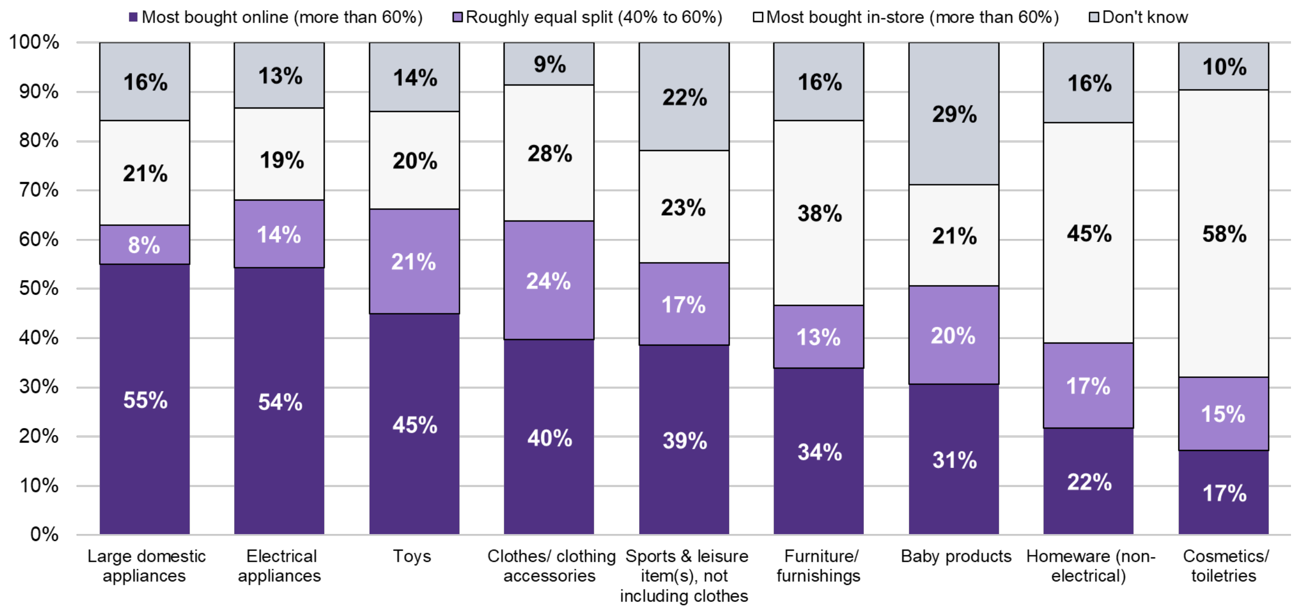
Purchasing products online

In wave six, respondents were asked to estimate what proportion of products in the last six months they had purchased online or in-store. As was the case when this question was last asked in wave four, electrical appliances (54%) and large domestic appliances (55%) remain the products people are most likely to say they usually purchase online. Similarly, non-electrical homeware (22%) and cosmetics (17%) remain the products least likely to be bought online. For these product categories, most said they purchased the majority of their items in-store (45% homeware, 58% cosmetics).

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 electrical appliance purchases offline (26%) compared to 18% of those aged 18 to 29. Similarly, 37% of those aged 65 and over purchased the majority of their clothes in-store, compared to 26% of 18 to 29 year olds.

Women are more likely than men to make purchases online – 42% said most of their recent clothing purchases were done this way (compared with 36% of men) and a fifth said most of their recent cosmetic purchases were online (20%, compared with 14% of men).

Figure 8. Proportion of items bought in the last six months 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 purchase section who purchased this category in the past 6 months (electrical appliances=2,380; large domestic appliances=1,148; toys=1,326; clothes/ clothing accessories=3,886; sports and leisure items=911; furniture/ furnishings=1,303; baby products=548; homeware (non-electrical)=1,522; cosmetics=4,075)

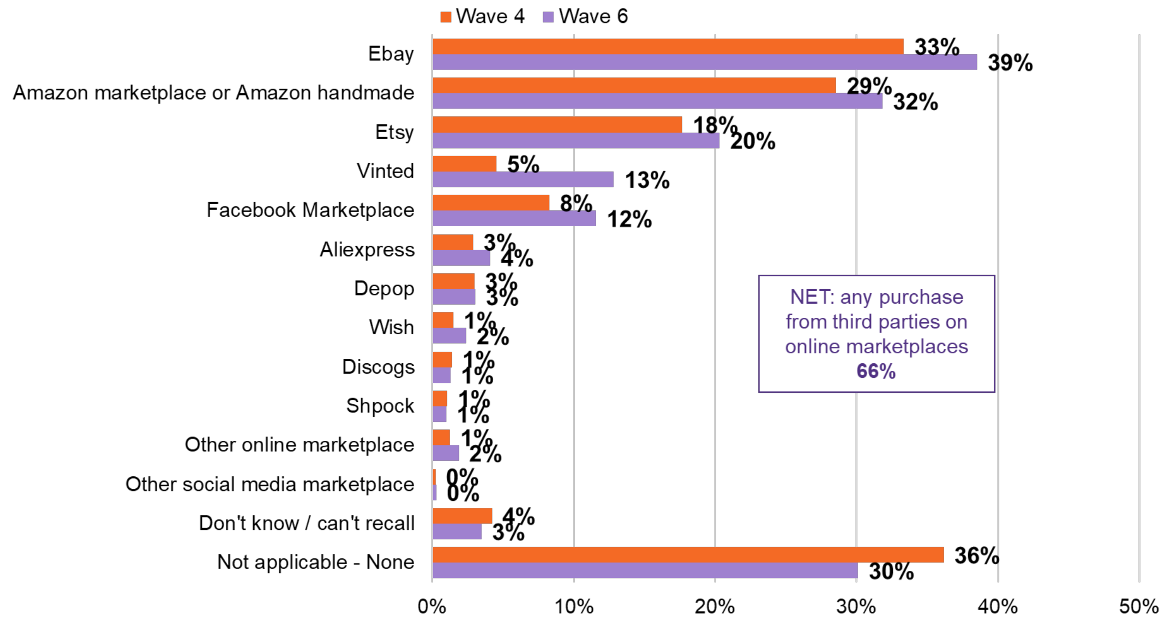
Buying and selling products on an online marketplace

The proportion who purchased something from a third party on an online marketplace in the last six months is 66%, a six-percentage point increase since last measured in wave four. The most popular online marketplace remains eBay (39%), an increase from 33% in wave four. Amazon marketplace (32%) and Etsy (20%) have both seen smaller, though still significant, increases. The strongest gain this wave is seen by second-hand clothing app Vinted, with 13% having bought a product from the platform in wave six, up from 5% in wave four.

The downward trend by age for purchases via online marketplaces reported previously is also seen this wave. Just over seven in ten (72%) of those aged 18 to 49 have done so, falling to 66% of those aged 50 to 64 and 54% of those aged 65+. It should be noted however that these figures represent significant increases in third-party online purchasing across all age groups since wave four.

While there is no large difference by gender in terms of likelihood to have used a third-party online marketplace in the past six months overall (66% of men, compared with 66% of women), men are more likely to have used eBay (43%, compared with 34% of women) and Amazon marketplace (36%, compared with 28% of women), while Etsy is more popular with women (28%, compared with 13% of men).

Figure 9. Online marketplaces purchased from in the past six months

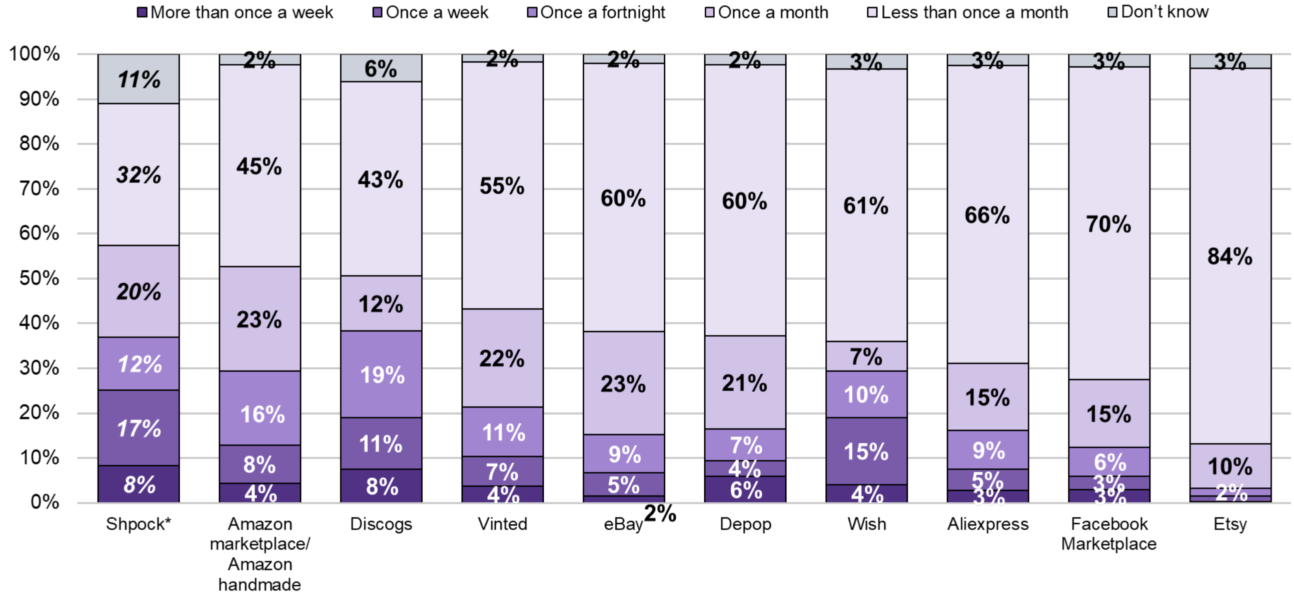


Q: Have you purchased any products from third parties selling on the following platforms in the past 6 months?
Base: All in online purchase section (W4=5,067; W6=5,159)

Those who had purchased from a listed online marketplace in the past six months were asked how frequently they had done so. Amazon marketplace or Amazon handmade is the platform that sees the greatest purchase frequency among its user base, with more than half (53%) having purchased a product at least once a month in the past six months. At the other end of the scale, only a small minority of Etsy users are frequent buyers, with 84% of this group having made a purchase less than once a month in the past six.

There are few consistent differences across demographics in terms of purchase frequency, indicating that frequency of purchase is predominately driven by the type of platform rather than personal characteristics. For example, although women are more likely than men to use Etsy, there is no gender difference in terms of their frequency of purchase (11% of men who have purchased via Etsy do so at least once a month, compared with 14% of women).

Figure 10. Frequency of purchasing on online marketplaces



Q: How often have you purchased products from each of the following platforms in the past 6 months?
Base: All who purchased products from third party online platform (Amazon marketplace/ Amazon handmade=1,628; Etsy=1,076; Wish=112; eBay=2,007; AliExpress=203; Vinted=664; Shpock=44; Depop=148; Facebook Marketplace=600; Discogs=56) *Note: small base, treat with caution*

Respondents who purchased items from each online marketplace in the last six months were asked what specific types of products they had bought. The types of products bought from a specific platform are highly dependent on that platform's "speciality". Some, such as Amazon marketplace/ Amazon handmade, eBay, Facebook Marketplace or AliExpress are generalist platforms, with no single product type particularly dominant over the other. Others, such as Vinted and Discogs, are highly specialised in a few types of products.

However, there are certain product categories that are consistently more likely to be purchased on online marketplaces. Leading the way here are clothes/ clothing accessories (e.g. shoes, sportswear, bags, jewellery). Among those who have purchased from an online platform in the past six months, clothes are the most bought product type bought by eBay users (30% have bought clothes from the platform in the past six months), AliExpress users (34%) and Wish users (28%). One in four users of Amazon marketplace/ Amazon handmade have bought clothes from this platform in the past six months, joint top alongside electrical appliances (both 25%). As mentioned, certain third-party online platforms specialise in clothing products, and therefore see the vast majority of their sales in this category; 89% of Vinted users bought clothes/ clothing accessories from the platform in the last six months, for example.

Electrical appliances (e.g. laptop, toaster, hairdryer, lights, vacuum cleaner, games console, smart home devices) are also a dominant product category on online marketplaces. Alongside being the joint most popular products bought on Amazon marketplace/ Amazon handmade, roughly one in six users of AliExpress (16%), eBay (15%), Wish (15%) and Facebook marketplace report having bought this category from these platforms in the last six months.

Two other product categories are also consistently popular on online marketplaces. The homeware, non-electrical (e.g. crockery, wall decorations) category is among the most popular on Etsy (23%), while around one in five Amazon marketplace/ Amazon handmade users (18%), 16% of AliExpress users, and 14% of Facebook marketplace users have purchased this category. Cosmetics (e.g. hair dye, make up, shampoo, toothpaste) also see high levels of reported purchasing behaviour; it is the third most popular product category among Amazon marketplace/Amazon handmade users, for example (21%).

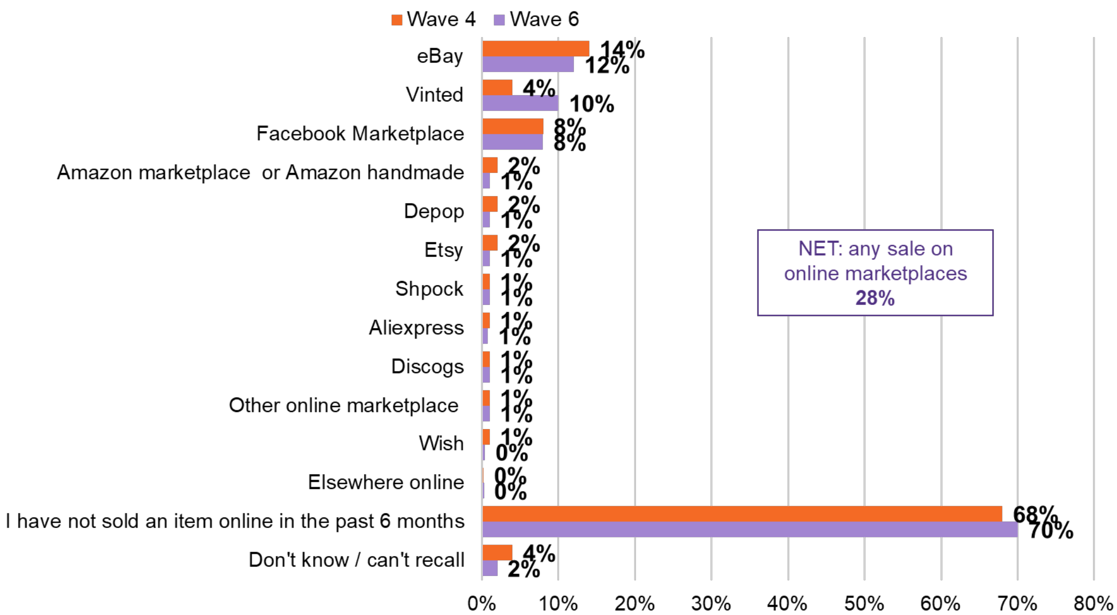
There has been a slight shift in the methods people use to purchase items from third party sellers on online marketplaces, with the marketplace's app rising from 27% in wave four to 33% in wave six. A web browser remains the slightly more common method at 36%, though this is down five percentage points. Just under three in ten (28%) use both equally, unchanged compared to wave four. Older respondents are more likely to use a browser (26% of those aged 18 to 29, compared with 49% of those aged 65+), while younger respondents use the marketplace's app (41% of those aged 18 to 29, compared with 19% of those aged 65+).

When it comes to selling products on an online platform, 28% report having done so in the past six months, consistent with 27% who had done so in wave four. eBay remains the most common platform to have sold an item on at 12%, though Vinted is now in second place having more than doubled to 10%.

Women are more likely than men to have sold something on an online marketplace recently (32% of women, compared with 24% of men), though this difference is almost entirely due to elevated usage of Vinted among the former. In wave four, 7% of women had sold on Vinted in the last six months, rising to 16% in wave six. By comparison, 1% of men had sold on Vinted in wave four rising to 4% in wave six.

Selling items on online marketplaces is much more common among younger adults, a pattern consistent with previous findings from wave four – over a third of those under 50 report doing so in the last six months (36% of those aged 18 to 29, 38% of those aged 30 to 49), compared to 22% of those aged 50 to 64 year olds and 13% of those aged 65 and older.

Figure 11. Online marketplaces sold on in the past six months



Q: In the past 6 months, have you sold an item on the following online platforms? Please select all that apply.
Base: All in online purchase section (W4=5,067; W6=5,159)

Perceptions of safety when purchasing online

The perception that products bought online are safe has risen across the board this wave. All but one of the types of retailers listed have seen a significant increase in the proportion saying that the products they sell are generally safe. Products bought from online retailers who sell a range of products continue to be those most likely to be thought of as safe, with 88% saying this. Amazon (82%), individual manufacturer websites (79%), Amazon marketplace (55%) and eBay (54%) all also see majorities perceiving their products to be generally safe.

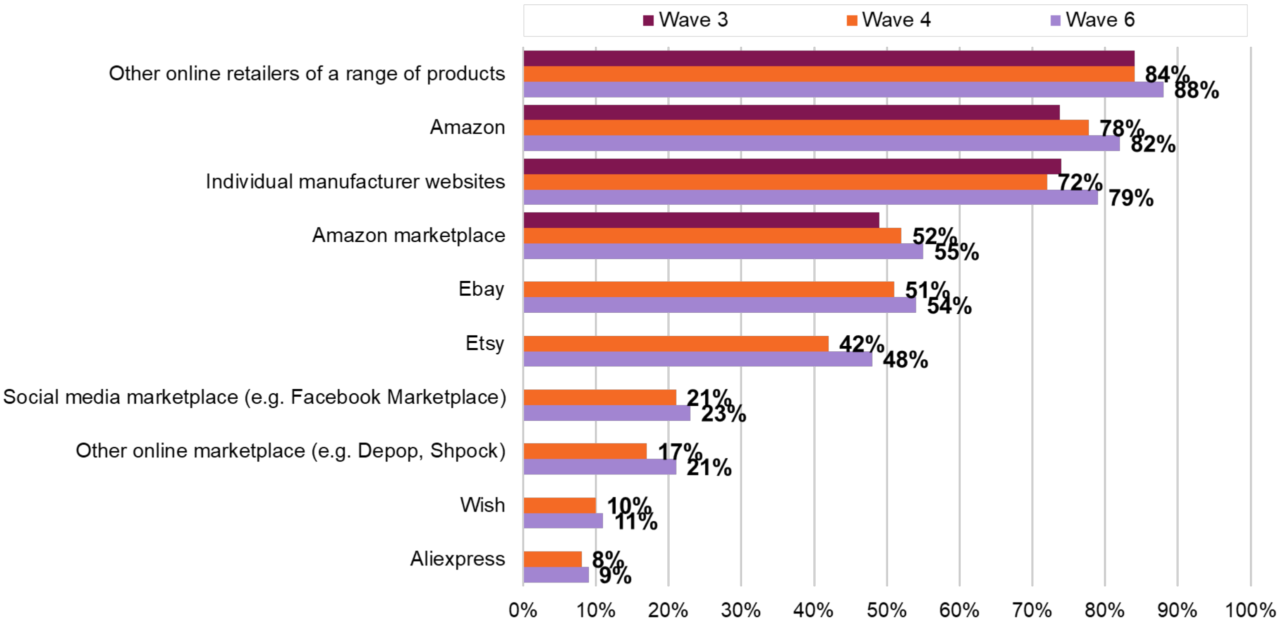
At the other end of the scale, over two-fifths (44%) think that products bought from social media marketplaces are unsafe, while people also think that products from Wish (32%) and AliExpress (26%) are more likely to be unsafe rather than safe.

The trend by age in perceptions of safety when purchasing online observed in wave four persist this wave. Younger respondents are substantially more likely to think that products from each of the retailer types listed are safe - for example, 64% of 18 to 29 year olds believe products from Etsy are safe, compared to just 31% of those aged 65 and over. However, the younger age groups are also more likely to say that products from these platforms are generally unsafe - for example, 61% of 18 to 29 year olds say this about Wish vs 9% of 65-and-overs. The key difference here is in levels of uncertainty, with the older age group substantially more likely to respond “don’t know” for each platform listed.

Some differences exist in perceptions of safety by gender, the largest of which include Etsy (57% of women believe products from here are safe, compared to 38% of men) and Amazon marketplace (58% of men believe it is safe, compared with 52% of women). A similar trend as that seen for age exists here, with men more likely than women to express an opinion either way, while women are more likely to be unsure.

Analysis of those in the lowest income bracket (under £25,000 gross household income per annum) compared to those earning above this shows the same trend emerging. Those in the low income bracket are consistently less likely to believe that products are safe across most of the retailers mentioned, but also less likely to say they are unsafe, meaning that the difference mostly comes from greater levels of uncertainty among this group.

Figure 12. Proportion who report products on each online retailer are "safe"



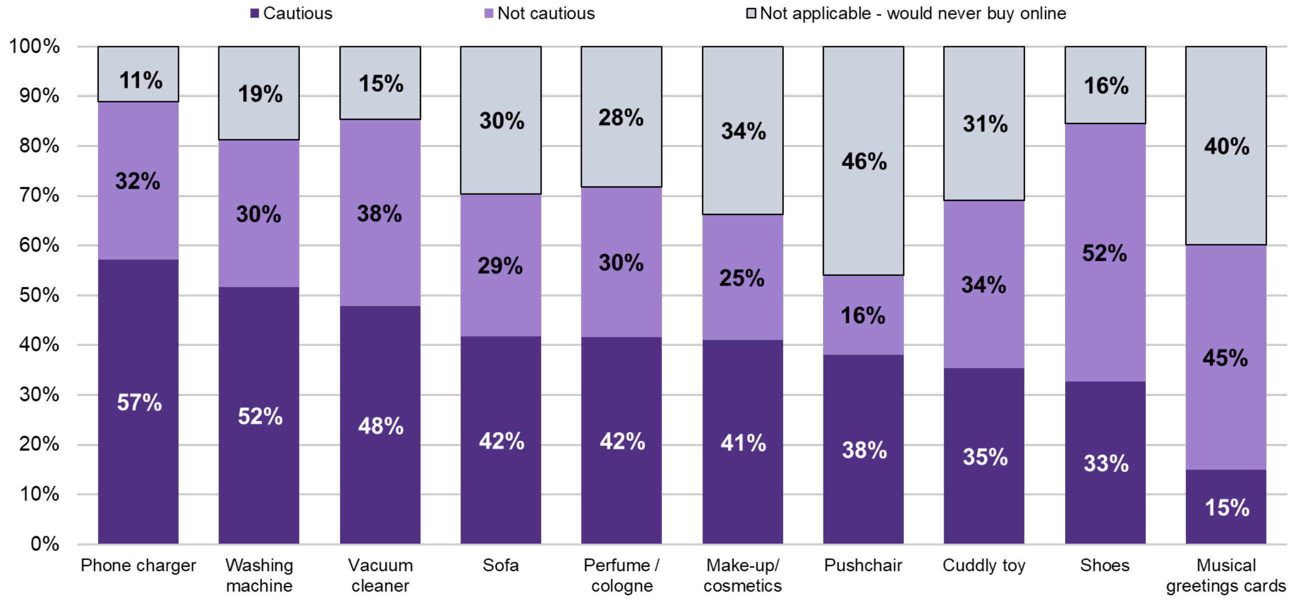
Q: Generally when purchasing products online from online marketplaces or direct from individual company websites how safe or not do you think the products you purchase are?
Base: All in online purchase section (W3=5,096; W4=5,067; W6=5,159)

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 ten specific products if they bought them online. As was the case when in wave four, people are most cautious about the safety of a phone charger bought online (57%), followed by washing machines (52%) and vacuum cleaners (48%). There has been little change in levels of caution regarding the products listed across waves.

Women are more likely than men to say they would be cautious about the safety of each product. The difference is highest for cosmetic products – half of women would be cautious about buying this online (50%), compared to a third of men (32%).

Those from an ethnic minority background report higher levels of caution about all products mentioned, apart from cuddly toys where levels of caution are level with white adults (36% of ethnic minority adults, compared with 35% of white respondents).

Figure 13. Caution about safety of products 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 purchase section (W6=5,159)

A focus on second-hand purchasing

In wave six, questions on second-hand purchasing were shown to approximately a quarter of all respondents, allocated randomly (n=2,527). Exact base sizes for specific questions are shown below each chart.

Key findings

- A majority (72%) of the UK public report that they would be likely to buy at least one of the types of products listed, second-hand.
- Clothes/ clothing accessories are the most common item the UK public say they would be likely to purchase (44%). This is followed by furniture/ furnishings (38%) and sports a leisure items (35%).
- The least common items likely to be purchased second-hand are cosmetics items (2%).
- The top three places the UK public would be likely to purchase second-hand items are charity shops (76%), online marketplaces e.g. Amazon, eBay, Etsy etc. (66%) and online community buy and sell pages e.g. social media community groups such as Facebook Marketplace, Gumtree etc (55%).
- Just under seven in ten (68%) say they always consider the safety of the product they are buying second-hand.
- The most common way respondents check the safety of second-hand items is checking reviews and feedback on the seller (52%).

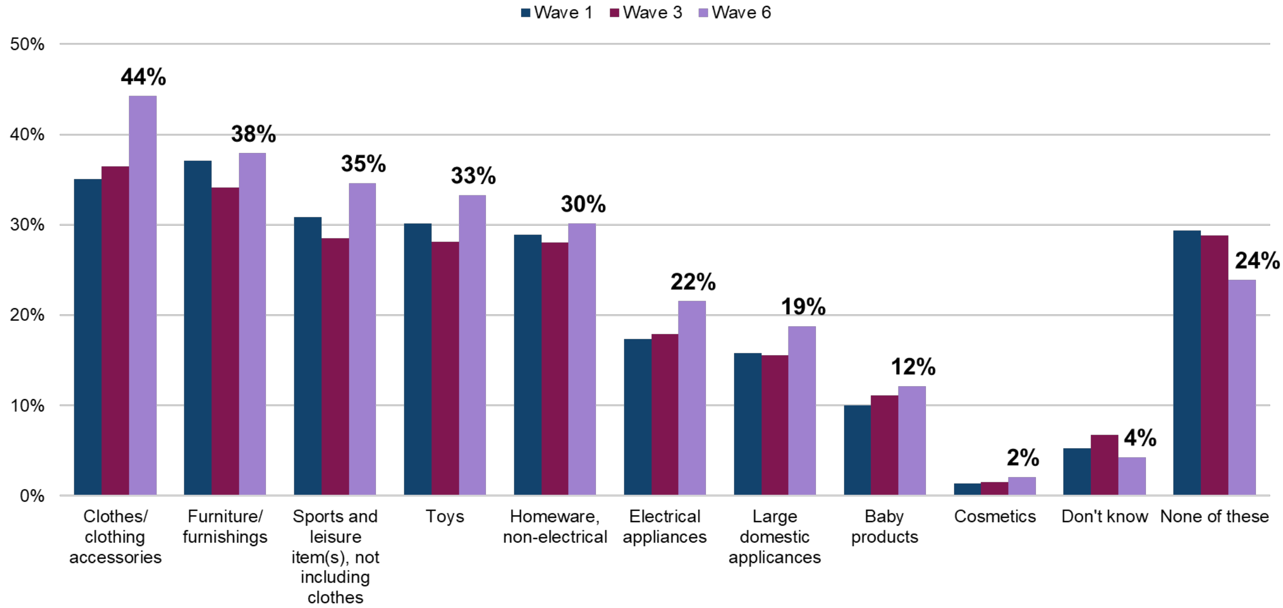
Purchasing second-hand products

Nearly two thirds (72%) of the UK public identified at least one product they would be likely to buy second-hand, an increase from the previous waves (65% in both W1 and W2). Most product categories have seen a rise in reported second-hand purchase. Of the listed products, respondents are most likely to purchase second-hand clothes/ clothing accessories (44%), furniture/ furnishings (38%), and sports and leisure items (35%). Electrical appliances (22%), large domestic appliances (19%), baby products (12%) and cosmetics (2%) are the least likely to be reported.

As with previous waves those with children in their household are more likely to report they would purchase at least one product second-hand (78%), compared to both the general public (72%) and those with no children in their household (69%). Among those who have children in the house, the most likely product they are to purchase second-hand is clothes and clothing (49%, compared with 42% of those without children in the house), followed by toys (47%, compared with 28% of those without children in the house) and sports and leisure items (46%, compared with 31% without children in the house). Those with young children aged five or under in the house are more likely to purchase any of the listed products second-hand (83%), compared to those with children aged 18 and over (69%); this is driven by toys (58% of those with children under 5, compared with 30% of those with children aged 18 and over).

Respondents who are at least coping on their current income are less likely to purchase second-hand (70%), compared to those who are finding it difficult (78%). Also, those with low educational attainment (69%) are less likely than those with high attainment (76%) to report doing so. This is in line with previous waves although there has been an increase in all groups saying they would be likely to buy at least something second-hand.

Figure 14. Products likely to buy second-hand



Q. Today, if you were looking to buy these types of products, which would you be likely to purchase second-hand rather than new? (Please select all that apply)
Base: All in second-hand section (W1=5,115, W3=5,091, W6=2,527)

Offline consumers are less likely than the general public to say they would buy products second-hand – a third (33%) would not buy any of the listed product categories second-hand.

Although people are more likely to purchase second-hand products offline than online overall (84% compared to 80% respectively), the top three methods are charity shops (76%), online marketplaces e.g. Amazon, eBay, Etsy etc. (66%) and online community buy and sell pages e.g. social media community groups such as Facebook Marketplace, Gumtree etc (55%). Although charity shops remain the top place to purchase second-hand goods, it has reduced from when this question was first asked in wave one (79% in W1, compared with 76% in W6). The other second-hand retailers have remained broadly consistent.

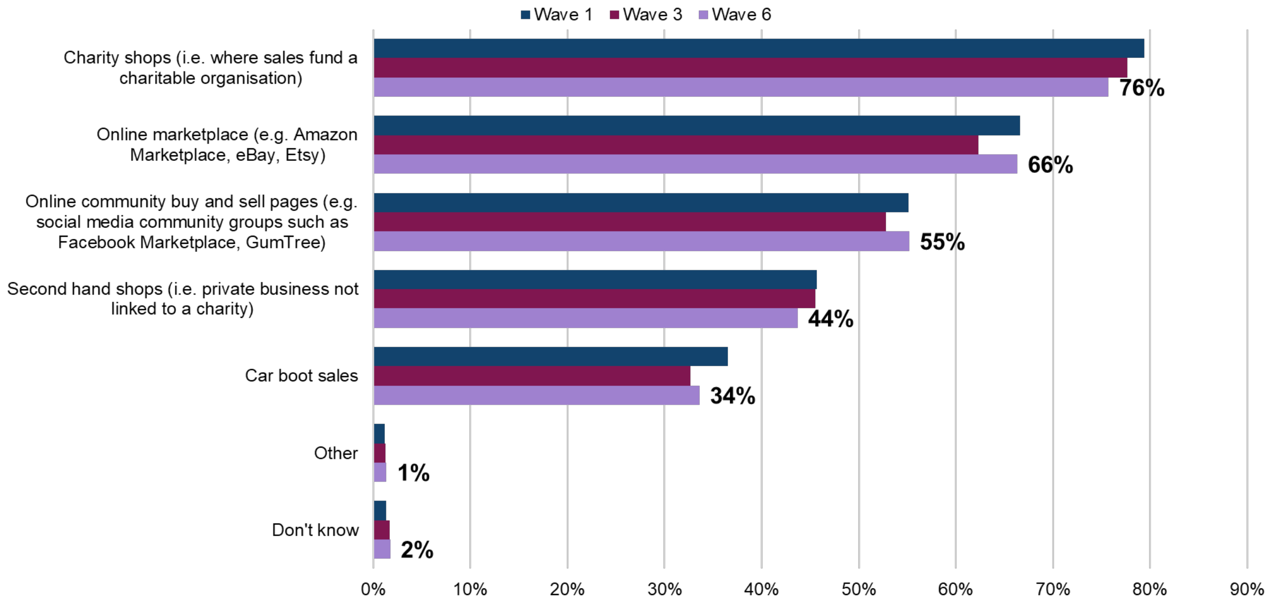
Although the majority report they would use a charity shop for second-hand purchases (76%), and this is the case across most products, those buying homeware are most likely to report they would use charity shops (88%), while those buying sports and leisure items were most likely to purchase from online marketplaces (77%).

Respondents aged 65 and over are most likely to report they would use a charity shop for a second-hand purchase (69% of those aged 18 to 29, 74% of those aged 30 to 49, 79% of those aged 50 to 64, 83% of those aged 65+), while they are significantly less likely than all other ages to identify online marketplaces (51%), online community buy and sell pages (34%) and second-hand shops (32%).

Respondents of a lower social grade (C2DE) are more likely to identify car boot sales (38%) compared to ABC1s (30%).

Respondents with a disability are more likely to identify car boot sales (37%) compared to 32% of those without a disability. In contrast, those without a disability are more likely to say they would use an online marketplace (68%, compared with 63% of those with a disability), or an online community buy and sell page (57%, compared with 51% of those with a disability).

Figure 15. Places to purchase second-hand products



Q: In which, if any, of the following places would you purchase second-hand products? (Please select all that apply). Base: All who would buy second-hand (W1=3,383, W3=3,338, W6=1,828)

Perceptions of safety when purchasing second-hand

There is a decrease this wave in those saying that they always consider the safety of the product they are buying second-hand (78% in W1, 79% in W3, 68% in W6), although it remains a majority.

There is also a decrease in agreement that the seller is responsible for ensuring a product is safe (77% in W1, 76% in W3, 73% in W6), but there is a consistent proportion agreeing that they are aware of their consumer rights if a product is unsafe (51% in W1, 49% in W3, 49% in W6).

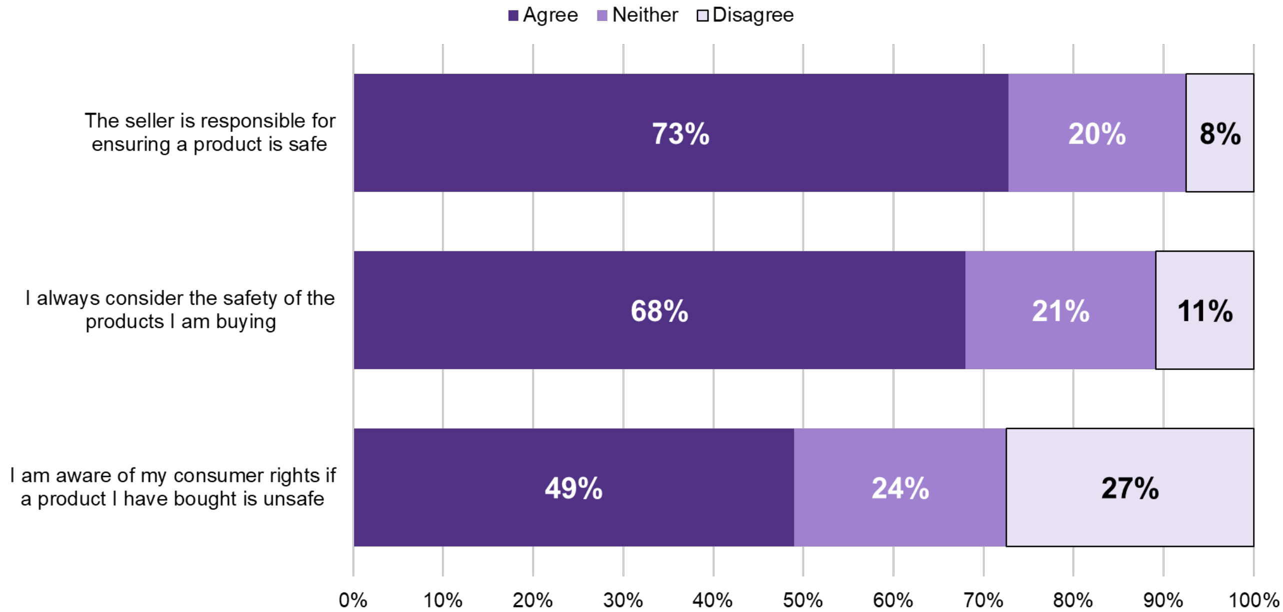
Those aged 65 and over are the most likely to agree they consider the safety of the products they are buying (81%), significantly higher than all other age groups. Comparatively those aged 18 to 29 are significantly more likely to disagree that they consider the safety of their second-hand purchases (18%) compared to all other age groups.

As seen in previous waves, younger age groups are the most likely to assume that the seller is responsible for ensuring a product is safe (80% of those aged 18 to 29) compared to three quarters (73%) of respondents overall.

Those with low educational attainment are most likely to agree they are aware of their consumer rights if a product they have bought is unsafe (53%), compared to those with a medium (50%) or high (44%) attainment.

Respondents from an ethnic minority background (57%) are also more likely than white respondents (48%) to report being aware of their consumer rights.

Figure 16. Agreement on second-hand products and safety



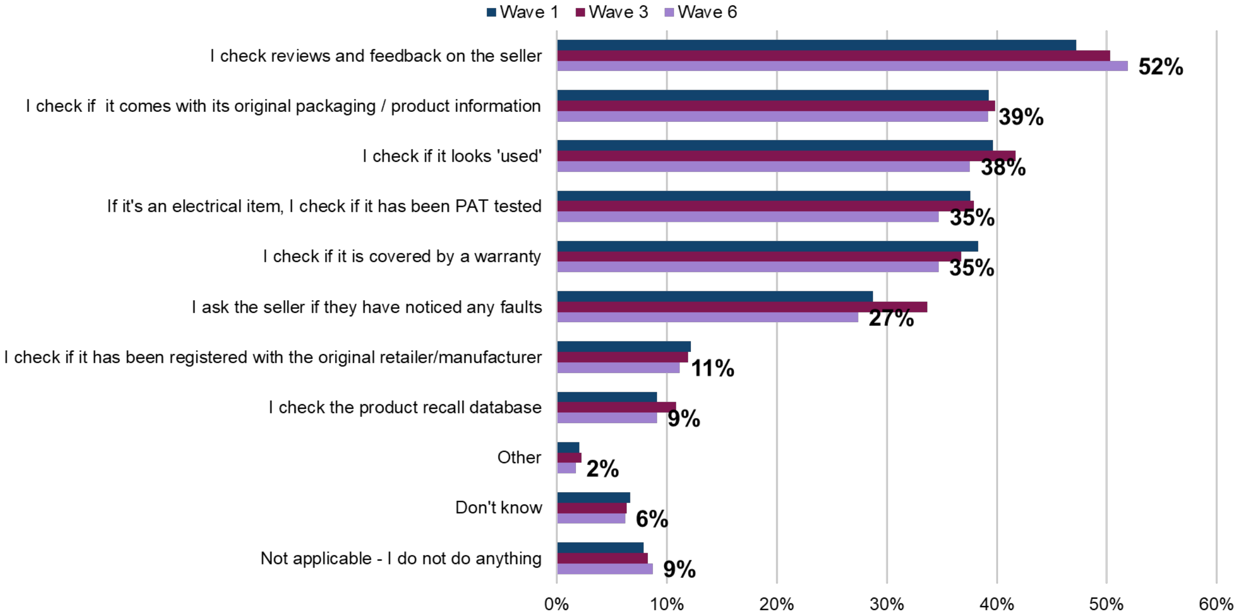
Q: To what extent, if at all, do you agree with the following statements?
Base: All who would buy second-hand in second-hand section (W6=1,828)

In line with wave one, only a small minority of respondents who would buy second-hand do not do anything to determine whether a product is safe (8% in W1 and W3, 9% in W6). For those who do check, checking reviews and feedback on the seller are the most common method used to ascertain safety with just over half reporting this (52%), which is broadly comparable with wave 3 (50%) and an increase from wave 1 (47%). This is followed by if it is in its original packaging (39%) or checking to see if it looks ‘used’ (38%).

There has been a fall since wave one in the proportion reporting that they check the warranty (38% in W1, 37% in W4, 35% in W6).

The proportion of those who check reviews and feedback on seller increases to 60% for those who would purchase second-hand through an online community buy and sell pages, and 59% among those who would purchase through an online marketplace.

Figure 17. Methods to check second-hand product is safe



Q: In which, if any, of the following are ways you determine whether a second-hand product is safe?
Base: All who would buy second-hand (W1=3,383; W3=3,338, W6=1,828)

Experiences of safety issues

In wave six, questions on experiences of safety issues were initially shown to all respondents who had bought a product in the last six months (n=8,036), and then subsequently to those who experienced a safety issue (n=752). Exact base sizes for specific questions are shown below each chart.

Key findings

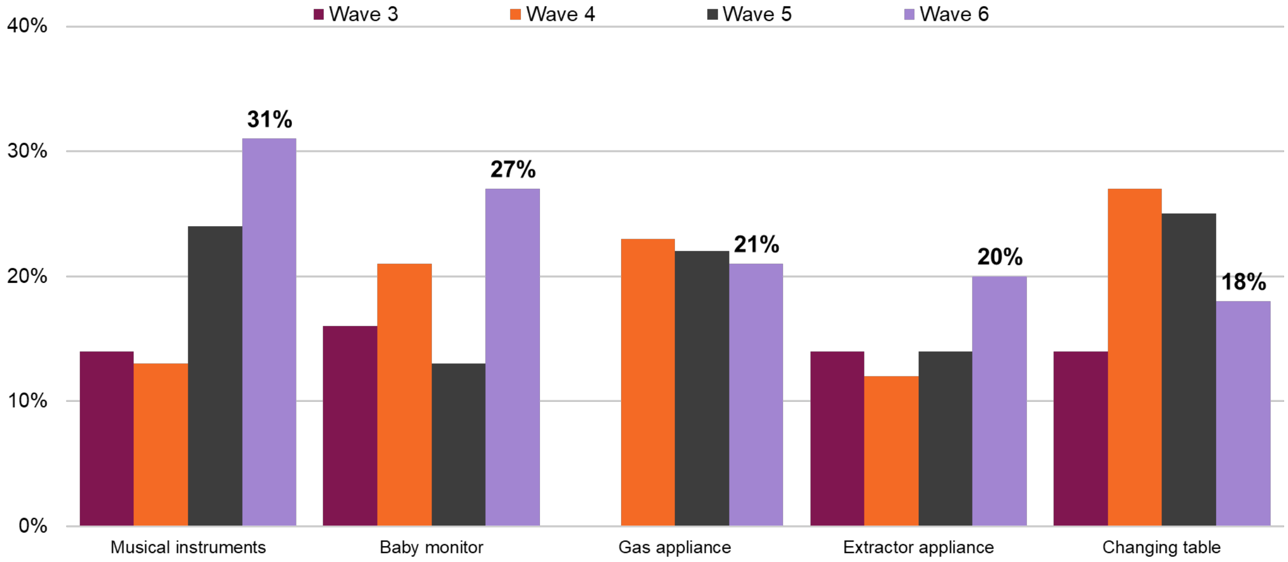
- Of respondents who bought a product in the last six months, one in ten (10%) report experiencing a safety issue of some kind.
- Those who bought a musical instrument are the most likely to experience a safety issue (31%), with reported incidence steadily rising since wave one (6%).
- The most common impact of a safety issue remains distress (24%), although damage to property/ other items has risen (19%).
- Most people do take action as a result of a safety issue. Overall, 77% took action with a safety issue in any product category, the highest proportion since tracking began.
- Not knowing what to do has sharply risen as the reason people did not take action – from 6% in wave five to 17% in wave six.

Seriousness of safety issues

Of those who bought a product within the last six months, one in ten (10%) experienced a safety issue of some kind. This is consistent and unchanged from previous waves. Also consistent with previous waves, baby products remain the most common category people have safety issues with (from the options provided).

The most common individual products that consumers in wave six have had a safety issue with are musical instruments, baby monitors, gas appliances, extractor appliances, changing tables. The prevalence of safety issues with musical instruments is significantly higher than in waves one to four, rising from 6% in wave one to 31% in wave six. Although changing tables have seen a fall in prevalence since wave five, the shift is not large enough to be significant due to the small sample sizes involved.

Figure 18. Top five products safety issues are experienced with (W6)



Q: You said that you purchased the following products in the last SIX months. Did you experience any safety issues with these products?
Base: All who bought a listed product in the last six months: (in wave six: musical instruments=134; baby monitor=85; gas appliance=80; extractor=65; changing table=68))

Consistent with previous waves, offline respondents are more likely to have no safety issues (98%) compared to the online respondents (90%).

On a 10-point scale (where 10 is the most serious), safety issues in wave six have a mean seriousness score of 4.9. This is not significantly different to wave four and five (both 4.7) but sits significantly higher than wave one (4.4), wave two (4.3) and wave three (4.6).

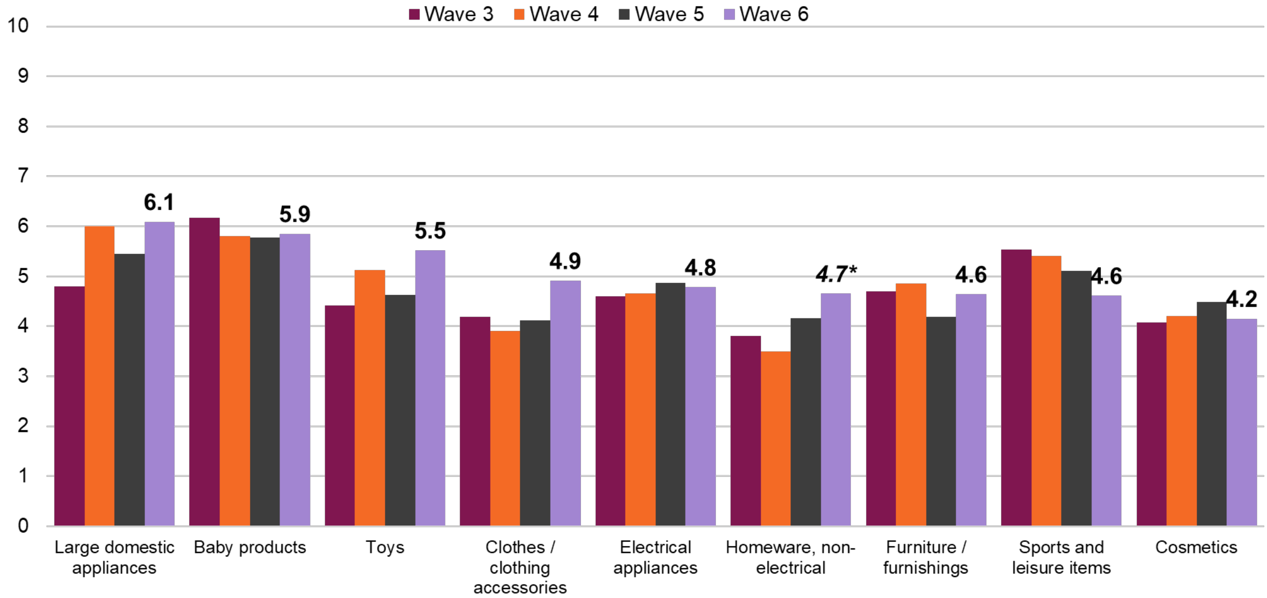
In previous waves, there was a decreasing trend in the proportion of people who said the issue was less serious (score of one to three). However, this has now steadied – over a third (36%) say the issue is less serious, consistent with wave four (37%) and wave five (36%). Instead, there appears to have been a rise in the proportion of people saying the issue was more serious (score of eight or higher) with just over a fifth saying this (22%), significantly higher than waves one (16%), two (17%), and three (18%).

People asked about a safety issue with a baby product consistently rate their issue as more serious (5.9) than people asked about other categories - with the exception of large domestic appliances, which has risen to an average seriousness of 6.1. The average perceived seriousness of safety issues with toys has risen from 4.6 in wave five to 5.5 in wave six, and the average seriousness of issues with clothing has risen from a low of 3.9 in wave four to 4.9 in wave six.

Consumers with a disability are more likely to say their safety issue was serious (32% scored eight or higher out of 10), compared to those without a disability (17%).

Consistent with previous waves, those without children in the household are more likely to report their issue was not serious (40%), compared to those with any children (30%).

Figure 19. Seriousness of safety issue with product



Q. Thinking about the safety issue you had with the following product…Please consider a scale of 1 to 10, where 1 represents the least serious type of issue you could face and 10 represents the most serious. What number best represents the seriousness of the issue?
Base: All asked about a safety issue with a listed product: (in wave six: electrical appliances=109; baby products=51; toys=79; cosmetics=106; large domestic appliance=57; clothes/ clothing accessories=140; furniture/ furnishings=85; homeware, non-electrical=48; sports and leisure items=77)*
**Note: small base, treat with caution*

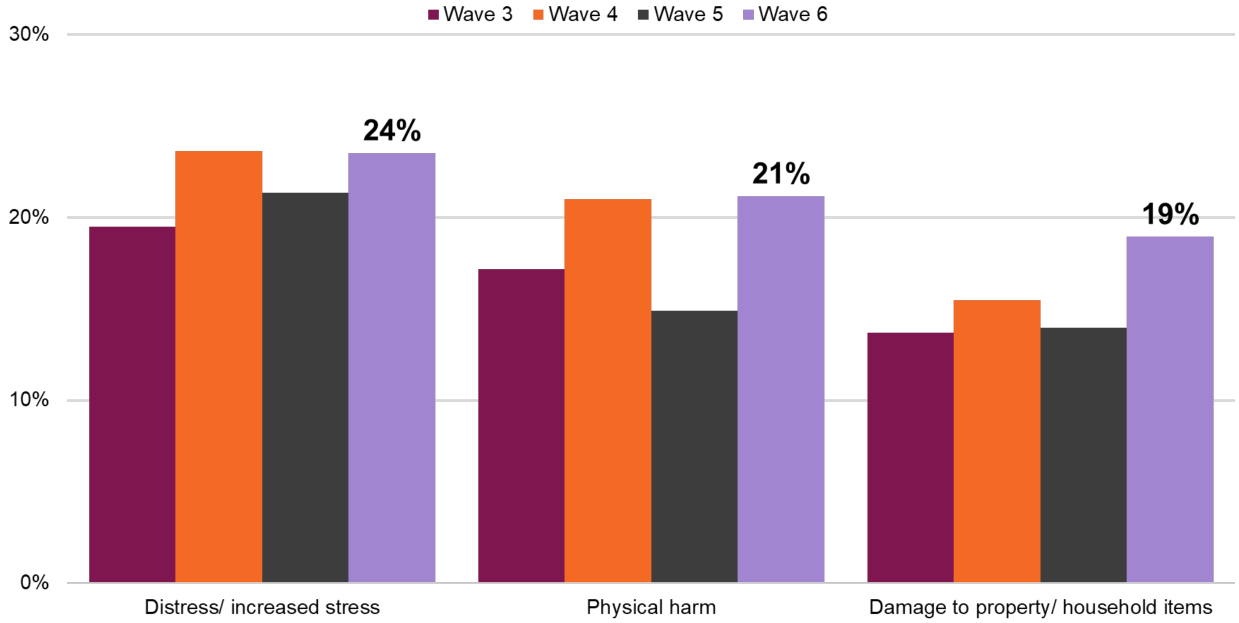
Impact of safety issues

The most common impact as a result of a safety issue is distress/ increased stress (24%), which is in line with previous waves. After a fall in wave five, the proportion experiencing physical harm has risen to one in five (21%), consistent with previous findings in wave four (21%).

There has been a significant increase in the proportion of consumers affected by a safety issue saying they experienced damage to property/ other household items – now sitting at one in five (19%), the highest proportion recorded since tracking began in 2020. This appears to have been driven by consumers who were asked about safety issues with a baby product – two in five say there was damage to property/ other items (41%), compared to less than a quarter (23%) who said this in wave five.

Those with children in the household are twice as likely to report any impact than those without kids – double the proportion report experiencing distress (34% of those with children, compared with 16% of those without), physical harm (28% of those with children, compared with 17% of those without), or property damage (25% of those with children, compared with 13% of those without).

Figure 20. 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 (W3=721; W4=691; W5=893; W6=752)

The level of healthcare needed as a result of physical harm experienced due to a safety issue is unchanged compared to previous waves. Of those who experienced physical harm as a result of the safety issue, around a third needed no aid (35%) or first aid such as a plaster (32%). One in ten needed urgent or non-urgent medical attention (both 11%), and 5% needed tertiary attention such as prolonged healthcare.

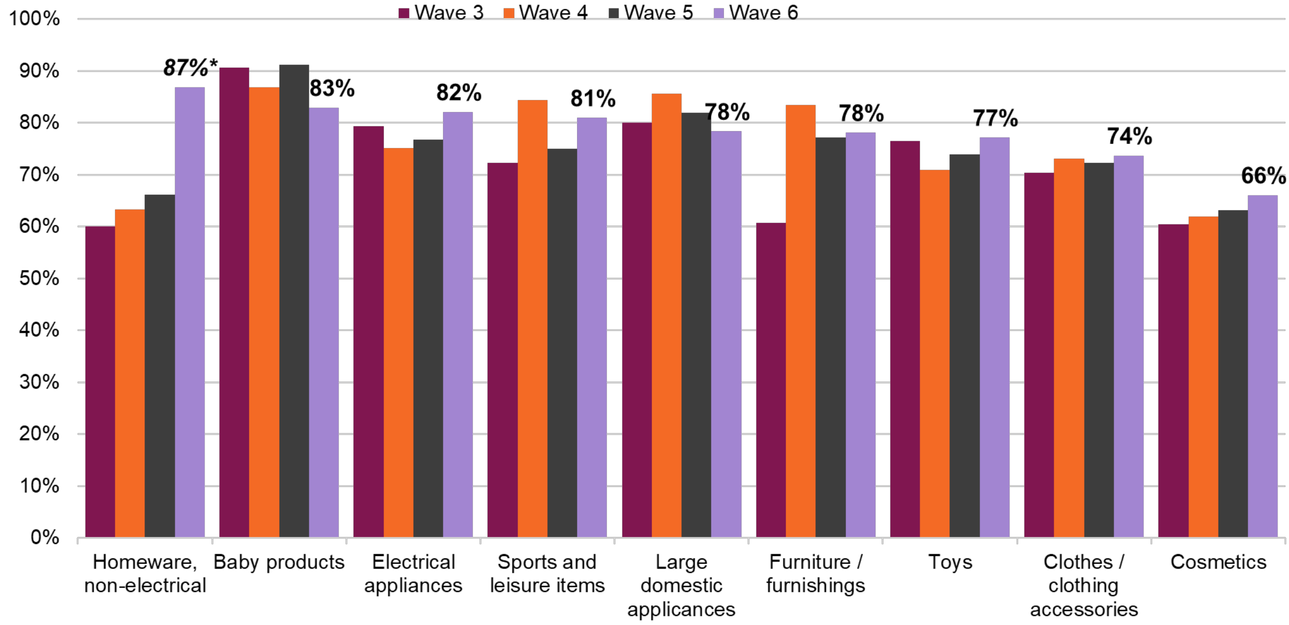
Among those who experienced property damage as a result of a safety issue, the types of damage are broadly consistent with previous tracking. Two-fifths experienced dents/ scratches to property (42%) or electrical damage (42%). Around three in ten experienced flood damage (31%) or fire damage (28%), and one in five experienced smoke damage (20%). The median estimated cost of property damage was £50, with 4% of respondents reporting that there was no monetary value to the damage or repairs needed.

Actions as a result of safety issues

The majority continue to take action if they experience a safety issue – in wave six, three-quarters (77%) of those who experienced an issue took some form of action. This is the highest proportion taking action seen in the tracker, and significantly higher than in wave two or three (both 71%). Consumers taking action as a result of a safety issue does vary based on the type of product they experienced the issue with. Just as issues with baby products tend to be considered seriously, consumers also tend to take action when faced with a safety issue (83%).

Although there has been no increase in the perceived seriousness of issues with electrical appliances or cosmetics, the likelihood of taking action has steadily risen. Consumers are more likely to take action due to an issue with an electrical appliance than they were in wave four (75%). Likelihood to take action due to an issue with cosmetics is significantly higher than wave two (57%, not charted).

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



Q. Which of the following actions did you take after becoming aware of the safety issue with the product?
Base: All who experienced a safety issue with a listed product: (in wave six: electrical appliances=109; baby products=51; toys=79; cosmetics=106; large domestic appliances=57; clothes/ clothing accessories=140; furniture/ furnishings=85; homeware, non-electrical=48; sports and leisure items=77)*
**Note: small base, treat with caution*

Consistent with previous waves, the most common action to take is to return the item for a refund/ exchange (22%). In wave six, there has been a significant rise in the proportion who say they threw away/ stopped using the item – now the second most likely action at 20% (vs 15% in W5). A similar proportion continue to attempt to fix it themselves (19%) or complain to the seller (18%).

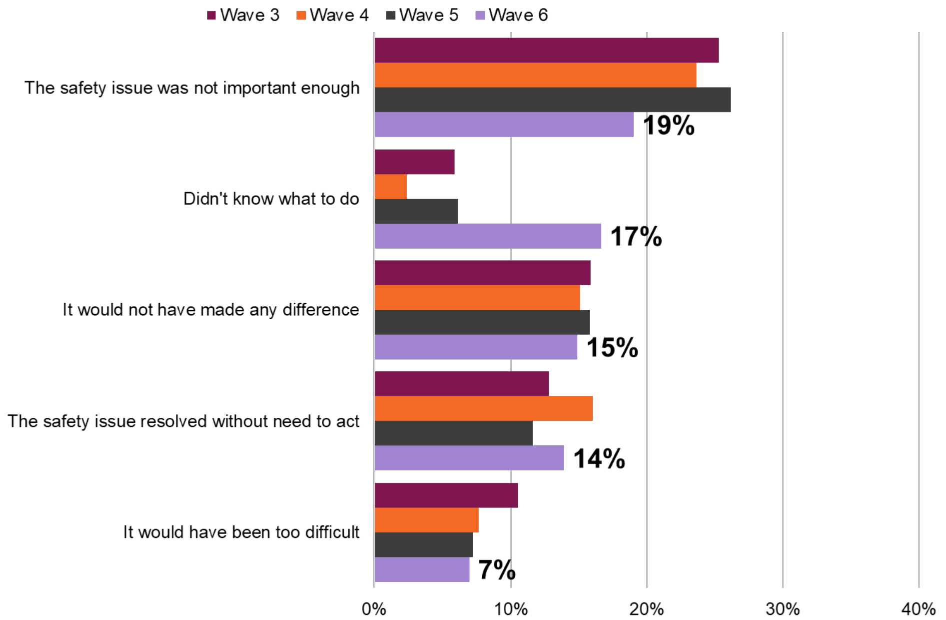
Those who had an issue with electrical appliances or cosmetics were the most likely to throw the item away (both 25%). There is a rising proportion of consumers attempting to fix large domestic appliances themselves – this was 4% in wave one, 10% in wave four, and now 22% of consumers who experienced of safety issues with a large domestic appliance say they attempted to fix it themselves.

A fifth of people who experienced a safety issue did not take any action (19%). Among these, the most common reason for not doing anything was the that the safety issue was not important enough (19%). However, there has been a sharp rise in the proportion of people who said they did not know what to do (6% in W5, 17% in W6).

Those from C2DE social grades are more likely than ABC1 respondents to say they did not know what to do (10% of ABC1, compared with 25% of C2DE). They are also more likely to say the issue resolved without needing to act (8% of ABC1, compared with 21% of C2DE).

Consumers with a high level of education are the most likely to say they did not know what to do (31%), more so than those with a medium level of education (8%).

Figure 22. Reason not taken as a result of product safety issue



Q. Which, if any, of the following best explain why you decided not to take any action?
Base: All who experienced a safety issue, but did not take action (W6=153)

Among those who experienced a safety issue with a product they have purchased in the last six months, over half say they are no longer experiencing the issue/ they no longer have the item (54%). Just under a fifth say it is still a safety issue, but they have given up trying to resolve it (18%) and 14% are still attempting to fix the issue. Those who experienced an issue with toys are the most likely to say they are still experiencing the safety issue but have given up trying to resolve it (29%). Those who experienced an issue with a sports/ leisure item are the most likely to say they are still attempting to fix their issue (30%).

Reporting safety issues

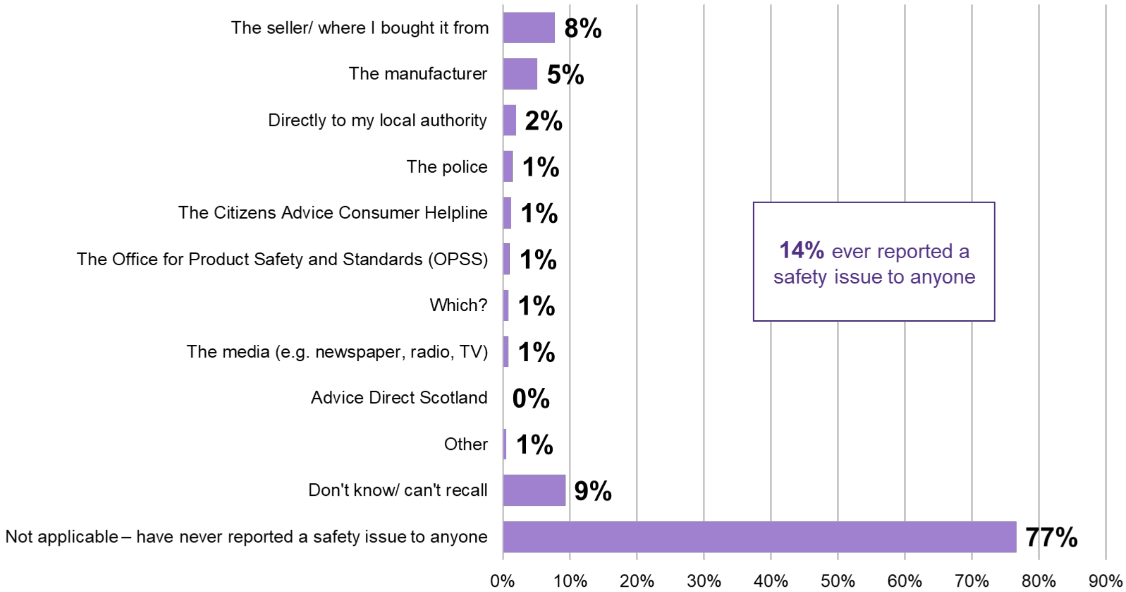
In wave six, all UK adults were asked if they had ever reported a safety issue to any relevant organisation – 14% have ever done so. In line with their activities after experiencing a safety issue, the seller is the most common organisation people have reported a safety issue to (8%). Only a small minority of UK adults have reported a safety issue to an organisation separate to the manufacturer/ seller (figure 22).

Men are more likely than women to say they have ever reported an issue to anyone (16% vs 12%). Those with low education levels (12%) are less likely to report an issue than medium or high levels of education (both 15%). Consumers aged 65+ are the least likely to report a safety issue to anyone, lower than all other age groups (15% of those aged 18 to 29, 16% of those aged 30 to 49, 14% of those aged 50 to 64, 11% of those aged 65+)

Black adults are the most likely to have ever reported a safety issue to someone (20%), followed by adults of a mixed ethnicity (19%), both significantly higher than white adults (13%).

Offline adults are less likely to have ever reported a safety issue to an organisation (7%).

Figure 23. Organisations ever reported a safety issue to



Q. Have you ever reported a safety issue to any of the following organisations?
Base: All UK adults (W6=10,216)

Thinking about the most recent occasion they reported a safety issue to these organisations, people are most satisfied with their experience with Which? (75%). Broadly, over two-thirds who reported the issue to the seller or manufacturer are satisfied with the response (both 68%). A similar proportion are satisfied with the response from the Citizen's Advice Consumer Helpline (67%) or the OPSS (66%). Six in ten were satisfied with the response from their local authority (59%), but less than half who reported a safety issue to the police were satisfied with the outcome (45%).

In the qualitative research, only a few participants had experienced issues, mainly with devices and appliances, including battery explosion of a phone, overheating of a kitchen appliance, and a broken oven glass. Most said that they reported the issue to the manufacturer or retailer and were able to resolve it by obtaining a refund or a replacement. In the case of incident with the battery fire, the participant was also compensated for the damage to the goods that were caught on fire.

When asked whether they would report an issue if they experienced it, most participants said that it would depend on the seriousness of the issue. Most would report it either to the manufacturer or to the retailer, as the felt they would be very likely to take action. Others felt that if the issue was serious, they would like to ensure that it is being reported to the manufacturer, so that they could take any further actions necessary, such as recalling the product.

"The retailer because there should be some sort of guarantee from them, but the manufacturer if the warranty is through them of course." (60, e-bike ownership, not experienced an issue)

"I think if it's a serious safety issue, the manufacturer does need to know." (50, hoverboard ownership, not experienced an issue)

Most participants had not thought about reporting safety issues to Trading Standards, some said they were not sure if the organisation would take any action, and others did not trust that they would be effective. Others preferred to report the issue to the manufacturer as they felt they would be more likely to act upon it. Most also said that if they were to report it to the trading standards, they would only do so if the issue was serious, of it the manufacturer was not taking any action.

“Reporting to authorities is pointless; just like reporting crime to the police. If they get sued and lose money, they will have an incentive to improve quality. Also, going direct to the source means that if they need to do a recall, it will happen more quickly.” (44, e-bike ownership, not experienced an issue)

“Trading standards doesn't exactly have a good reputation, so I'd not bother.” (36, e-scooter ownership, not experienced an issue)

“I would report to the manufacturer but if there was a serious incident, I would report it to trading standards or government agency … I think the advantage of reporting is that trends can be visible, and manufacturer can then issue a recall.” (46, e-bike ownership, experienced an issue)

Perceptions and experiences of product registration

In wave six, questions on product registration were shown to all respondents (n=10,216). Exact base sizes for specific questions are shown below each chart.

Key findings

- Most people are comfortable with automatic registration at the point of purchase (66%), consistent with previous waves.
- There has been a particular rise in the comfort with automatic registration at the point of installation (62% in W4, compared with 68% in W6).

Comfort towards automatic registration

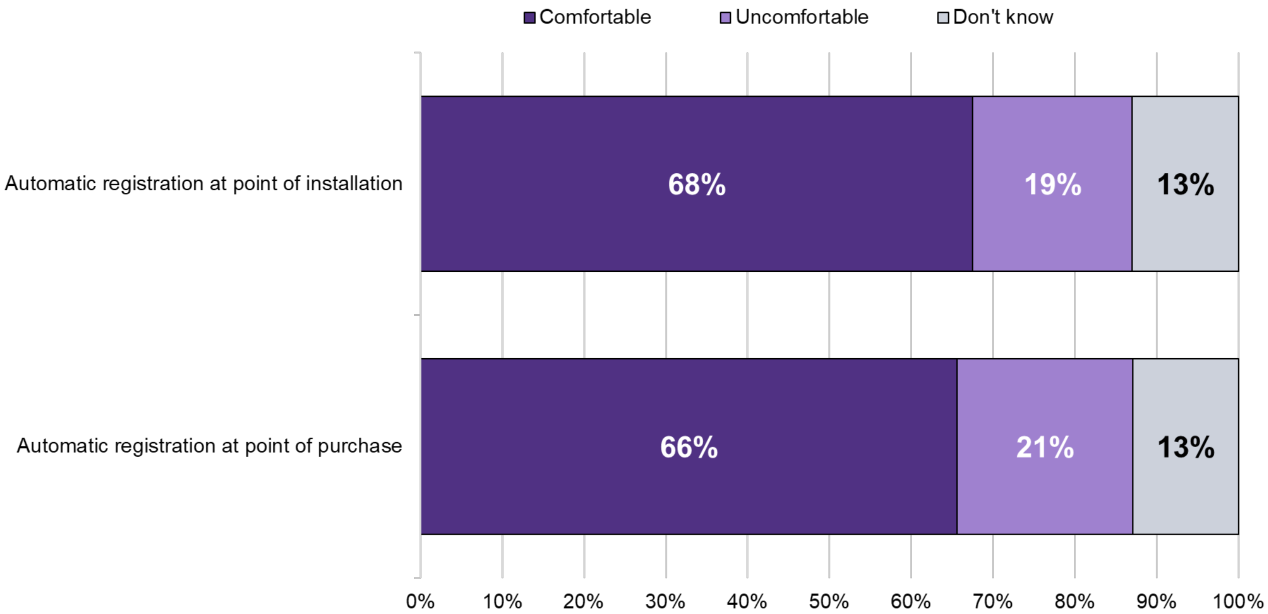
UK adults were presented with two variations on automatic registration – where their details and the model of the product would be provided to the manufacturer at either the point of purchase or the point of installation, so that the owner could be contacted in the event of a safety issue. Broadly, the general public are comfortable with automatic registration, with two-thirds or more saying they would be comfortable with each scenario (66% at point of purchase, 68% at point of installation).

The level of comfort with automatic registration at the point of purchase is broadly unchanged from previous waves, but the comfort with registration at the point of installation has risen since wave four (62% in W4, compared with 68% in W6).

In wave four, renters were less comfortable with automatic registration than owners and this pattern is still evident – comfort with registration at the point of installation has risen amongst both renters (57% in W4, compared with 63% in W6) and owners (67% in W4, compared with 73% in W6). Similarly, the age trend, where younger consumers are more unsure and thus less comfortable, is still evident.

Black adults are the most likely to feel comfortable with automatic registration in either scenario (72% both), while those from an Arab or other background are the least likely to feel comfortable (50% at point of purchase, 61% at point of installation).

Figure 24. Comfort with automatic registration of eligible products



Q. As a reminder, 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 UK adults (W6=10,216)

Appendix A: topical spotlights

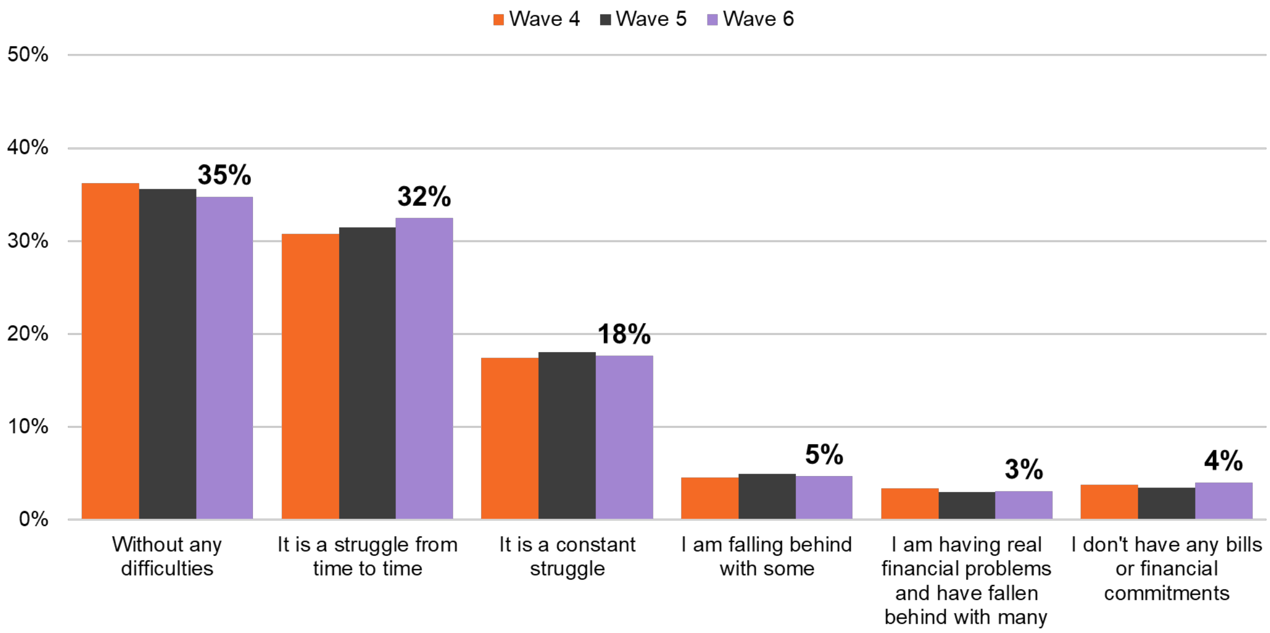
Cost of living

In wave six, questions on online purchasing were shown to all respondents (n=10,216). Exact base sizes for specific questions are shown below each chart.

A majority of the UK public continue to report some extent of struggling to keep up with their bills and financial commitments, now significantly higher than when tracking of this began in wave four (56% in W4, 57% in W5, 58% in W6). Just over a third report being able to keep up with bills and financial commitments without any difficulty (35%).

Among those with low household incomes, seven in ten report any level of financial struggle (70%), and a quarter report that it is a constant struggle to keep up (24%). However, this is unchanged from previous waves. Those with high household incomes are the most likely to have felt an increased impact from the cost of living, with more reporting that they are now struggling than were before – among those with a household income of £150,000 or more, the proportion feeling some level of difficulty has risen from a fifth to a third (19% in W4, 28% in W5, 34% in W6). A quarter now report feeling the struggle from time to time (12% in W4, 18% in W5, 24% in W6).

Figure 25. Keeping up with bills and financial commitments

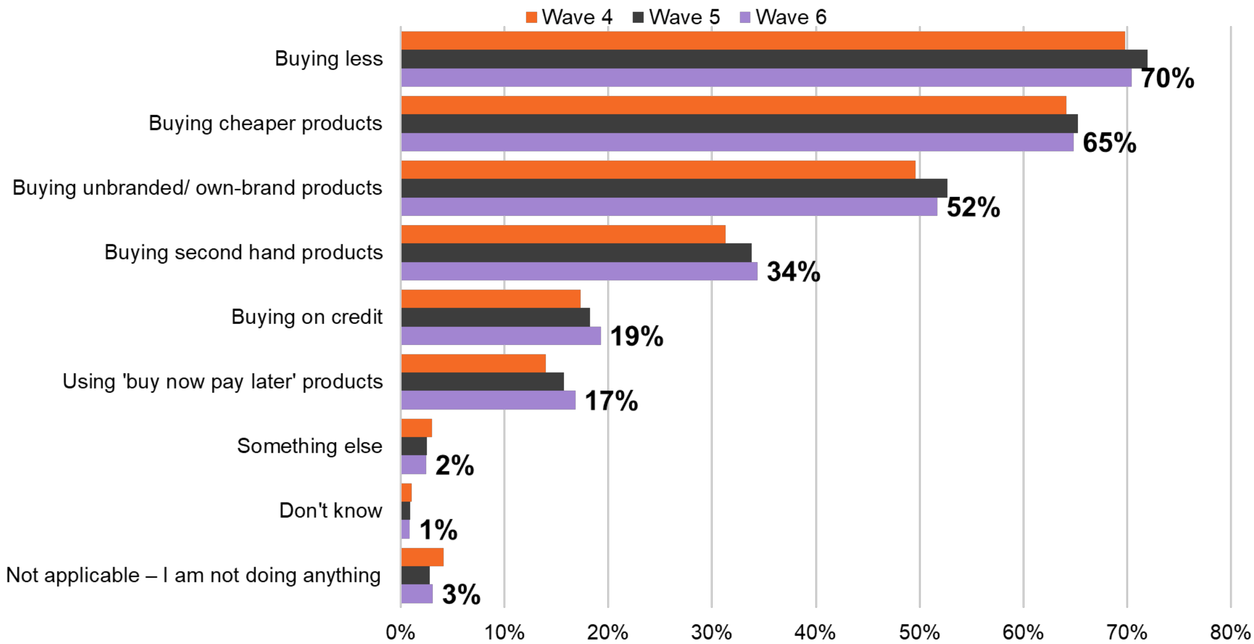


Q. Which one of the following statements BEST describes how well you are keeping up with your bills and financial commitments at the moment?
Base: All respondents (W4=10,156; W5=10,182; W6=10,216)

Those who mentioned at least some level of financial difficulty were asked what steps they are taking to mitigate this when purchasing products. In line with previous waves, most say they are buying less (70%) or buying cheaper products (65%). Compared with wave four, there has been a significant rise in the proportion buying on credit (17% in W4, 18% in W5, 19% in W6) or using 'buy now-pay later' (14% in W4, 16% in W5, 17% in W6).

‘Buy now-pay later’ agreements are most popular among women (18%, compared with 15% of men) and younger consumers (20% of those aged 18 to 29, 22% of those aged 30 to 49, 13% of those aged 50 to 64, 6% of those aged 65+). However, these agreements are also more popular among those on higher incomes. Only 16% of those with a household income of less than £25k say they use these, compared to 18% with a household income between £25k to £49k and 21% of those with a household income of £50k or more. The same pattern is seen for buying products on credit – lower income households are less likely than higher income households to use this in response to struggling with finances (16% of those earning less than £25k, compared with 25% of those earning £50k or more).

Figure 26. 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 (W4=5,685; W5=5,897; W6=5,990)

YouGov’s Cost of Living Segmentation

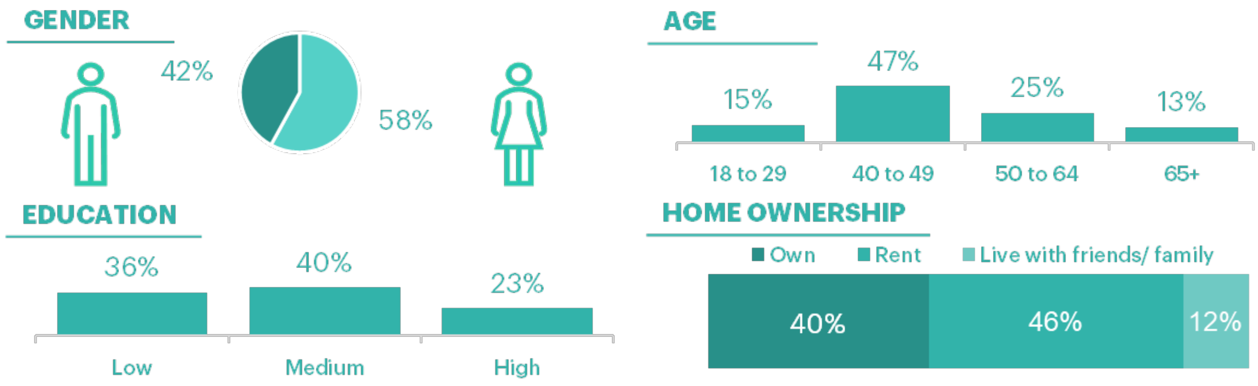
In wave six, YouGov’s cost of living segmentation was included in the survey. This groups the UK population into five groups by their experience and viewpoint on the cost-of-living crisis. The groups were derived from a machine-learning clustering algorithm run on responses to a YouGov survey fielded in December 2022 to January 2023. The model was not fed any information about income levels, socio-economic background, or savings. Instead, the groups are clustered by their attitudes to the cost of living such as how they respond to making cuts in their spending, views on their household finances, and perspectives on the future of the British economy.

There are five groups in the segmentation. The sections below outline their original segmentation summary, their demographic profile within the OPSS data, and how their attitudes to product safety, product recalls, and registration compared to the overall UK population surveyed in wave six.

- **The Calm and Comfortable**:

The below sections outline how attitudes to product safety, product recalls, and registration vary across the segments and how they compare to the overall UK population surveyed in wave six.

Worried and Suffering



This segment are at the extreme end of the struggle and worry associated with the cost-of-living crisis. They have made cuts and expect to have to make more and are very worried about the coming years.

Those in the Worried and Suffering segment are facing a constant struggle with their bills (44%, compared with 18% in W6 overall) or they may have fallen behind with many financial commitments (15%, compared with 3% in W6 overall). In light of this, they are more likely than the overall wave six sample to be buying second-hand (43%, compared with 34% in W6 overall), buying less (78%, compared with 70% in W6 overall), or be buying on credit (26%, compared with 19% in W6 overall).

This group are more likely to think that the UK's regulatory system does not keep products safe at all (7%, compared with 3% in W6 overall). Price is a key driver in determining if a product is safe (17%, compared with 13% in W6 overall), but they would have a product that was less safe if it was cheaper (10%, compared with 7% in W6 overall).

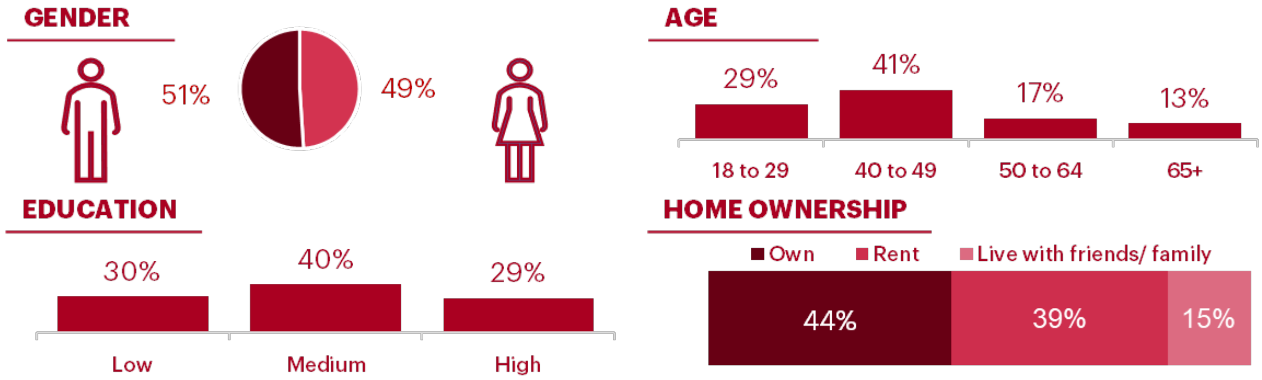
They tend to be eBay users – when asked about a product they purchased online in the last six months, they are more likely than average to say it came from eBay (16%, compared with 10% in W6 overall) and 44% have purchased anything from eBay in the last six months (compared with 39% in W6 overall).

Thinking about an item they purchased offline, they tend to say it came from the supermarket (29%, compared with 24% in W6 overall). Those who purchased offline are also more likely to say the product was either second-hand used (15%, compared with 12% in W6 overall) or 'other' new such as factory seconds (9%, compared with 7% in W6 overall). However, they are the most likely to have considered product safety when making their purchase (11%, compared with 8% in W6 overall).

They are more likely than average to say they would not be comfortable at all with automatic registration, whether at the point of purchase (11%, compared with 7% in W6 overall) or at the point of installation (11%, compared with 7% in W6 overall).

They are the most likely to look at large purchases second-hand, with half saying they would be likely to purchase furniture second-hand (49%, compared with 38% in W6 overall). A third would be likely to buy second-hand large domestic appliances (34%, compared with 19% in W6 overall).

Cautiously Hopeful Strugglers



These people are feeling the pinch of the cost-of-living crisis, but while they are likely to have made cuts, have the most positive outlook towards the UK economy and their own personal finances going forward.

Cautiously Hopeful Strugglers are more likely to be experiencing any level of struggle with their bills (75%, compared with 58% in W6 overall). One in five are using 'buy now pay later' schemes to mitigate financial struggles (18%, compared with 16% in W6 overall), but they are much less likely than average to cut back on purchases as a result of financial issues (64%, compared with 71% in W6 overall).

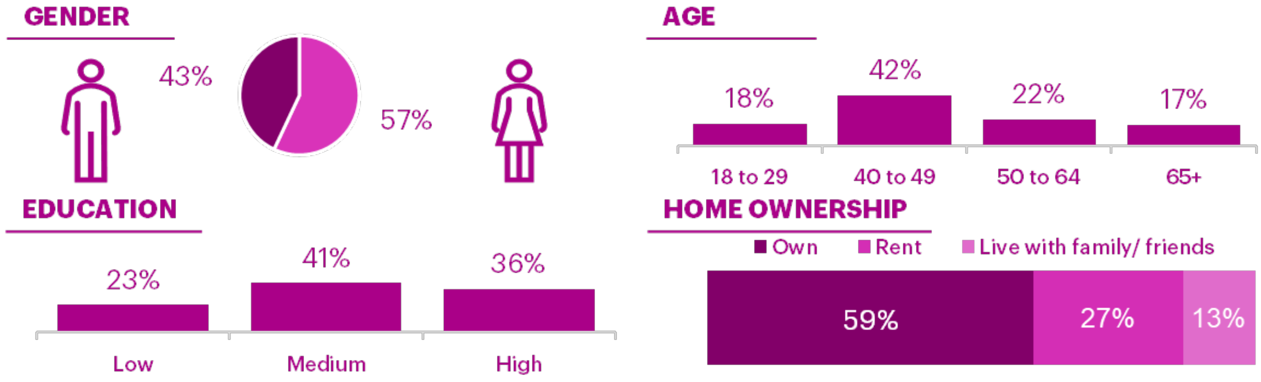
They are more likely than average to buy a less-safe product if it costs them less money (14%, compared with 7% in W6 overall). However, they do believe that UK retailers would not risk their reputation by selling unsafe products (42%, compared with 36% in W6 overall) and that UK regulatory systems keep products completely safe (10%, compared with 5% in W6 overall).

Price is the chief influencer of thinking a product is safe (18%, compared with 13% in W6 overall), although they also look at the UK government safety framework (13%, compared with 10% in W6 overall). Broadly, they are more likely than others to trust the UK government (7%, compared with 3% in W6 overall) and local government (5%, compared with 2% in W6 overall).

Among those who purchased an item from an online marketplace in the last six months, this group are more likely than others to say the individual consumer is responsible for the safety of products on online marketplaces (13%, compared with 8% in W6 overall). When thinking about a product they purchased in the last six months, they are more likely to say they purchased it online (60%, compared with 57% in W6 overall) and the speed of delivery was important to their purchase (12%, compared with 10% in W6 overall).

They are heavier Facebook Marketplace users than other groups – 16% having purchased something from this platform in the last six months, compared to 12% in W6 overall. 13% have sold something on Facebook Marketplace in the last six months (compared with 8% in W6 overall).

Squeezed but Coping



These people are ‘the middle of the road’ on most metrics. They are definitely feeling the effects of the cost-of-living crisis but seem to be managing their way through

This segment is struggling with their bills from time to time (51%, compared with 32% in W6 overall) and are more likely than the rest of wave six to have responded to this financial squeeze by buying less (76%, compared with 70% in W6 overall) or buying unbranded products (57%, compared with 52% in W6 overall).

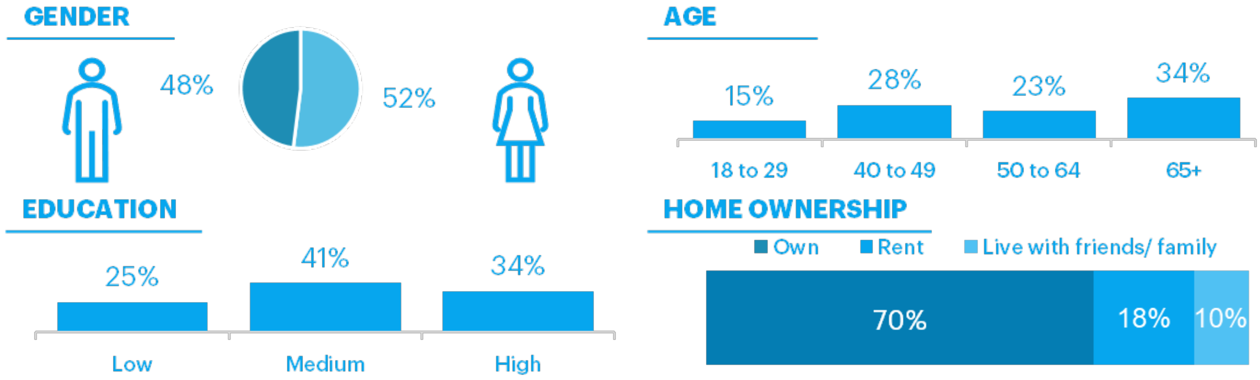
Online reviews and recommendations drive this group’s trust in a product being safe (41%, compared with 35% in W6 overall). They also consider recommendations from friends/ family (33% vs 29%), and previous experience of buying the product (47%, compared with 44% in W6 overall). However, they believe the UK’s regulatory system only ‘somewhat’ keeps products safe (49%, compared with 43% in W6 overall).

When asked about a product purchased in the last six months, they are more likely than others to say they considered the purchase price (63%, compared with 60% in W6 overall).

This group shops on Etsy (26% having done so in the past six months, compared to 20% in W6 overall) and Vinted (18%, compared with 13% in W6 overall). They tend to be online shoppers, being more likely than other groups to usually buy a range of products online including electrical appliances (30%, compared with 25% in W6 overall), toys (16%, compared with 12% in W6 overall) and clothes/ clothing accessories (33%, compared with 30% in W6 overall).

Their reliance on online reviews cuts through to second-hand shopping – they are more likely than other groups to say they check sellers’ reviews to see if a second-hand product is safe (60%, compared with 52% in W6 overall). They also check if the product looks ‘used’ (43%, compared with 38% in W6 overall).

Unsettled Withstanders



This segment are not really feeling the effects of the cost-of-living crisis yet, but are very worried for the coming months – particularly outwardly for the UK as whole

This group tends to be keeping up with their bills and financial commitments without any difficulties (54%, compared with 35% in W6 overall) and have not done anything to mitigate financial commitments (7%, compared with 3% in W6 overall).

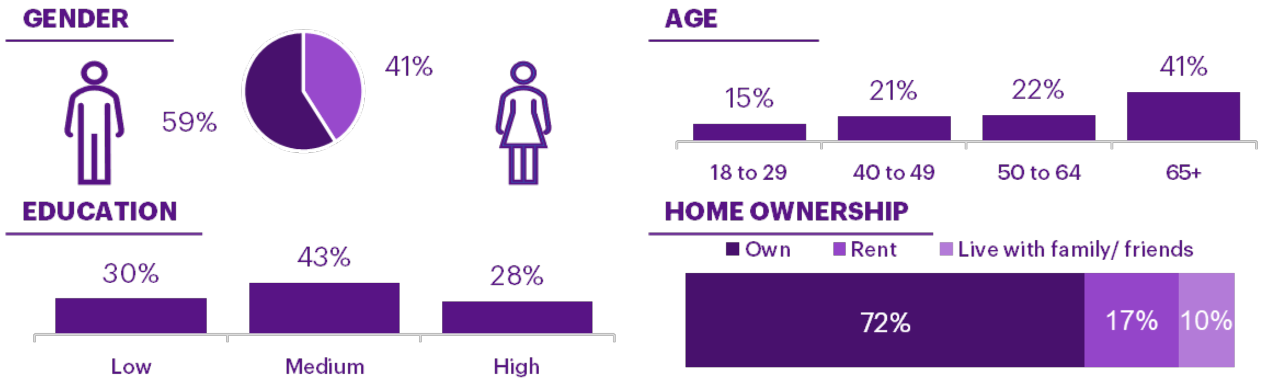
Kitemarks are key in this group trusting a product is safe (31%, compared with 27% in W6 overall), although they also look at their previous experience with the product (47%, compared with 44% in W6 overall) and the manufacturing brand (26%, compared with 23% in W6 overall). Broadly, they are more likely than average to think products in the UK are generally safe as there are regulations in place (63%, compared with 61% in W6 overall) and that the regulatory systems keep products safe 'a great deal' (43%, compared with 41% in W6 overall).

When asked about a product purchased offline in the last six months, they tend to have bought something from a high-street retailer (46%, compared with 40% in W6 overall). If it was a product purchased online, it came from an online retailer such as Argos etc (32%, compared with 28% in W6 overall).

This group are more likely than others to have purchased off Amazon Marketplace in the last six months (36%, compared with 32% in W6 overall). However, they do not sell their own items on online platforms (75% have not done this, compared with 70% in W6 overall).

When shopping for second-hand items, they tend to use charity shops (82%, compared with 76% in W6 overall).

Calm and Comfortable



These people are relatively unaffected by the cost-of-living crisis so far, and quite optimistic that they will remain fairly unimpacted over the coming year.

Similar to the Withstanders, this group are keeping up with their bills and commitments (75%, compared with 35% in W6 overall). They are also more likely to not have any bills or commitments in the first place (6%, compared with 4% in W6 overall).

They are more confident than average to think the regulatory system in the UK keeps products 'completely' safe (8%, compared with 5% in W6 overall) and that products sold in the UK are generally safe as there are regulations in place (66%, compared with 61% in W6 overall). They believe that safety issues are caused by people misusing products rather than issues with the product itself (41%, compared with 35% in W6 overall) and that UK retailers would not risk their reputation by selling unsafe products (41%, compared with 35% in W6 overall).

When purchasing a product, they trust the brand name of the manufacturer more than average (28%, compared with 23% in W6 overall). They are also particularly keen on kitemarks (30%, compared with 27% in W6 overall). However, they are unlikely to take into account recommendations from friends/ family (24%, compared with 29% in W6 overall) or online reviews (27%, compared with 35% in W6 overall).

Thinking about a product purchased in the last six months, they tend to say it was brand new (88%, compared with 81% in W6 overall). If it was purchased offline, they are also more likely than others to say it was purchased from a high street retailer (46%, compared with 40% in W6 overall).

Among those who experienced a safety issue, this group tend to rate it as the least serious issue possible (29% gave a score of one out of 10, compared with 18% in W6 overall).

They are the most likely to be very comfortable with automatic registration, whether at the point of purchase (27%, compared with 23% in W6 overall) or at the point of installation (26%, compared with 22% in W6 overall).

They are very unlikely to have shop online in the past six months – more likely than the other groups to say they have not purchased anything from third party sellers (37%, compared with 30% in W6 overall) or that they have not sold anything online (76%, compared with 70% in W6 overall). They are also very unlikely to shop second-hand – 40% would be unlikely to do so, compared to 25% of W6 overall.

Magnets

In wave six, questions on magnets 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.

Concern regarding the safety of toys containing magnets or batteries for children under five years of age remains relatively stable since wave four. However, there appears to have been a trend over time of declining concern since the earlier waves (figure 26). A majority of adults would be concerned about the safety of magnetic fidget toys (66%), construction toys (64%), and desk toys (60%). Levels of concern for these products are again unchanged since wave four, though lower than they were at waves one and two.

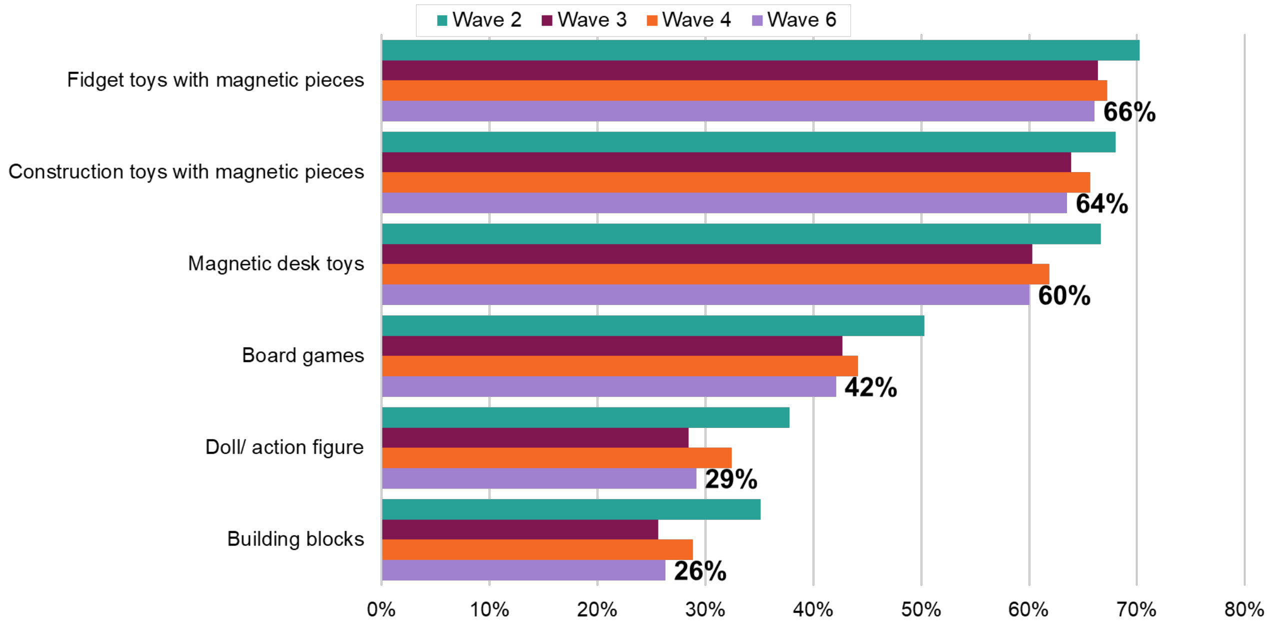
Products not containing magnets or batteries gain lower levels of concern, such as building blocks (26%) and dolls/action figures (29%). These represent the only statistically significant changes this wave, with concern around both declining by three percentage points since wave four.

Concern for the safety of these products for young children is higher among women for all products listed (apart from building blocks). In particular, more women are concerned about giving children under five fidget toys with magnetic pieces (74%, compared with 58% of men), construction toys with magnetic pieces (70%, compared with 57% of men) and magnetic desk toys (67%, compared with 53% of men).

As was reported in wave four, there are few differences between households with and without children. Those whose children are over 18 years old tend to be concerned more than those with younger children – for example, 75% of those with a child over 18 are concerned about construction toys with magnetic pieces, compared to 58% of those with a child up to five years old.

The age gradient reported previously remains evident in this wave; younger adults tend to be less concerned, while those aged 65 and over report substantially higher levels of concern. For example, 73% of those aged 65 and over report being concerned about magnetic fidget toys compared to 62% of those aged 18 to 29.

Figure 27. Proportion who would be concerned about a child playing with each item



Q: Thinking about the following types of toy, how concerned or not would you be that they are safe for a child under 5 to play with?
Base: All respondents in magnets section (W2=4,127; W3=6,795; W4=3,384; W6=3,381)

Reported purchase frequency of toys containing magnetic pieces remains low, with 8% having bought one of these in the past six months. The most commonly purchased items of those listed are fidget toys and children’s construction toys (both 3%). Relative purchase frequency, both at the overall level and for individual items, is unchanged compared to wave four.

Those with children in their household are more likely than those without to report having purchased any magnetic items in the last six months (18% with children in household, 4% without). Younger adults with children in their household are the most likely to have bought magnetic fidget toys (12% of those aged 18 to 29 with children in household, compared with 5% of those aged 50 to 64 with children).

Those from an ethnic minority background are more likely than white adults to report purchasing magnetic items in the last six months (11%, compared with 7% of white respondents).

Button/ coin batteries

In wave six, questions on button/ coin batteries were shown to approximately a third of all respondents, allocated randomly (n=3,396). Exact base sizes for specific questions are shown below each chart.

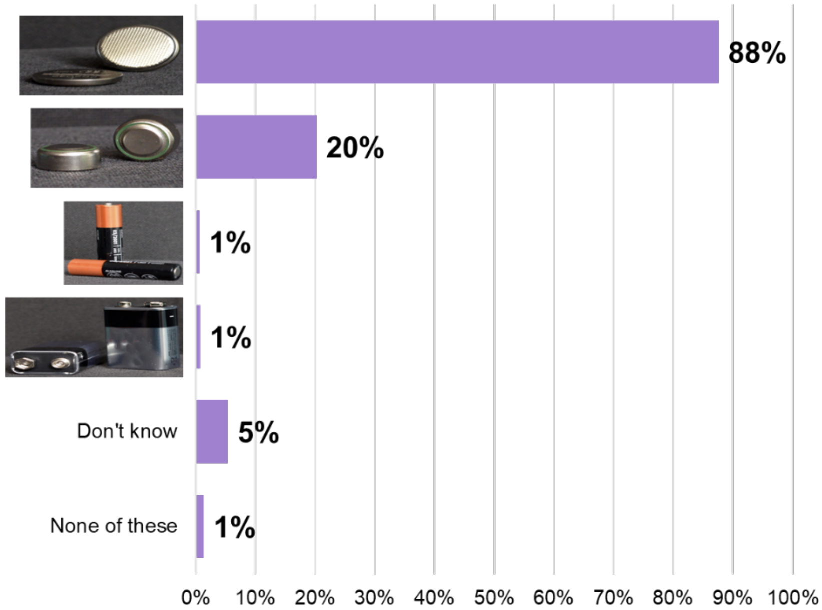
Respondents were asked to what extent they would be concerned about the safety of a number of different types of toys for a child aged under 5. Toys with coin/ button batteries remain those receiving the highest level of concern for children of this age (73% say they would be concerned), statistically unchanged from wave four (72%). Toys containing an AAA/ AA battery also gain high levels of concern, with 57% saying they would be worried about these. Alongside batteries, toys containing magnets also see a majority saying they would be concerned about them (66% concerned about fidget toys with magnetic pieces; 64% concerned about construction toys with magnetic pieces; 60% concerned about magnetic desk toys).

A gender gap is observed in levels of worry about toys containing batteries, with women more likely to be concerned. Specifically, for toys containing a coin/button battery, 78% of women report being concerned compared to 67% of men, while a similar difference is seen for AAA/ AA battery (62% of women, compared with 53% of men). There is also a difference by age, with 84% of those aged 65 and over report being concerned compared to 68% of under 30s, for example. Households with children report slightly less concern overall; only toys with AAA/ AA batteries see a difference here (59% of those with no children are concerned, compared with 53% of those with any children).

For the first time this wave, respondents were asked whether they could identify the correct image of a coin battery. Respondents had the ability to choose multiple images if they wanted to. When shown a variety of images of different kinds of batteries, 88% of respondents select the correct image. A fifth (20%) select the button batteries and 1% select the other two images.

Men are more likely to select the correct image (90%), compared with women (85%), while those from lower social grades (C2DE) respondents are more likely to have selected the image of the button battery (23%), compared to those from higher social grades (18% ABC1).

Figure 28. Coin battery recognition



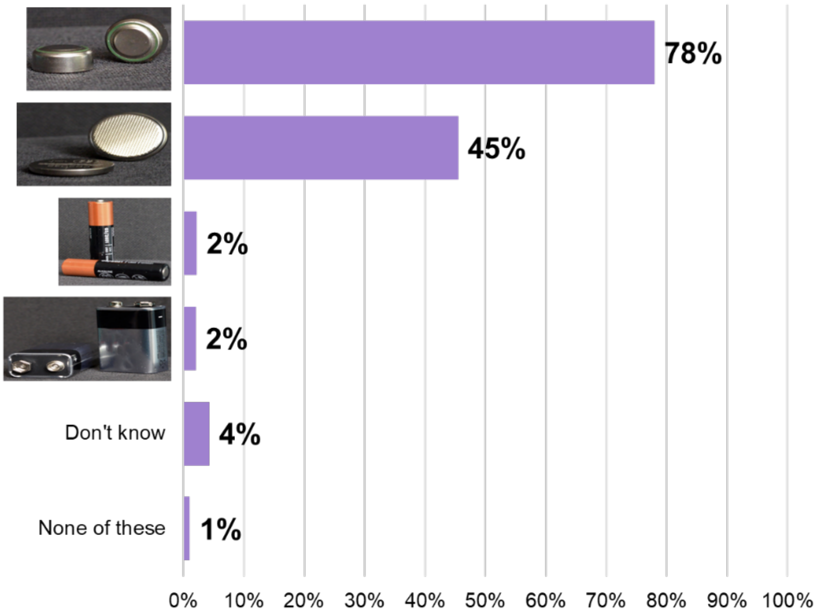
Q: Which, if any of the following images do you think shows a coin battery?
Base: All respondents in magnets and button battery section (W6=3,396)

Those with high educational attainment were the most likely to correctly identify the image of the coin battery (91%), compared to those of medium educational attainment (86%) or low educational attainment (86%).

A slightly smaller percentage are able to correctly select the image of the button battery compared to the coin battery question, although at over three quarters (78%) it is still a majority. The second-most selected image is the image of the coin battery (45%), both the images of other batteries were 2%. It is clear that there is less clarity about the button battery compared to the coin battery.

Again, men are more likely to be able to assign the correct image to the button battery (80%), compared to women (76%). Those from higher social grades are more likely to select the button battery picture (79% of ABC1), compared to those from lower social grades (76% of C2DE), while those from lower social grades are more likely than those from higher grades to select the coin battery picture (44% of ABC1, compared with 48% of C2DE).

Figure 29. Button battery recognition



Q: Which, if any of the following images do you think shows a button battery?
Base: All respondents in magnets and button battery section (W6=3,396)

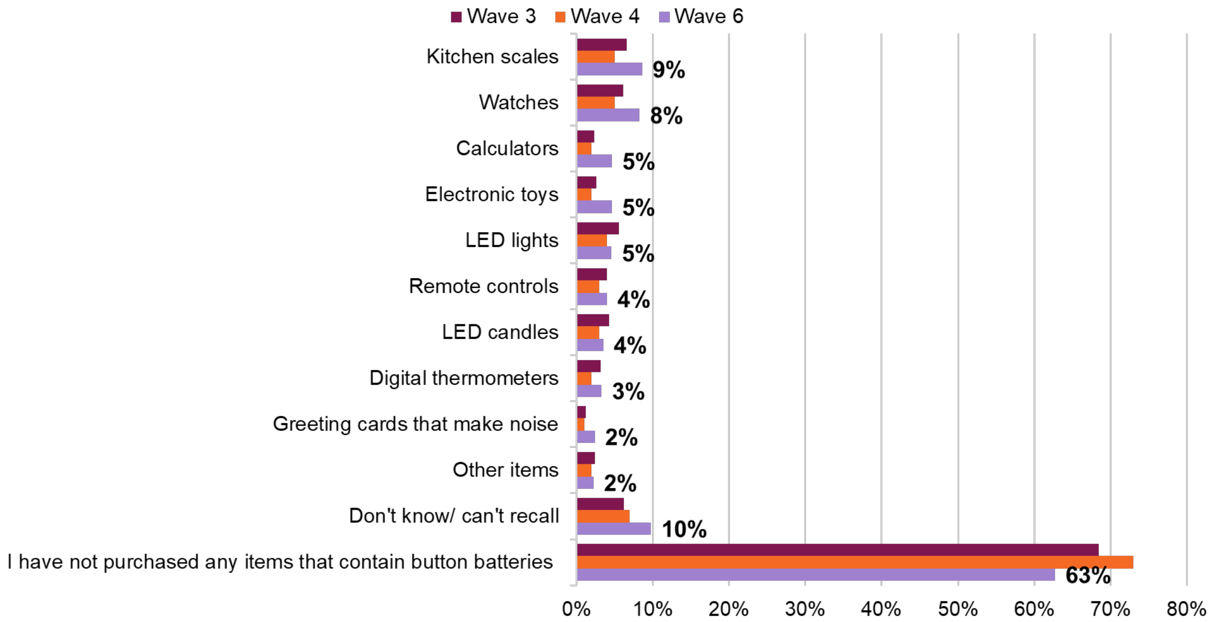
The majority of the UK public report that they have not purchased a product in the last six months which contains a button battery (63%), this is a reduction from wave four when this question was last asked (73%). There has been a significant increase from the previous wave in the proportion saying they have bought many of the items, with kitchen scales increasing by 4% (5% in W4, compared with 9% in W6), watches increasing by 3% (5% in W4, compared with 8% in W6) and calculators having increased by 3% (2% in W4, compared with 5% in W6).

The most purchased item among men which contained a button battery was watches (10%, compared with 7% of women). While women were less likely than men to have purchased anything with a button battery in the last six months (65%, compared with 61% of men), the product they were most likely to purchase which had a button battery was kitchen scales (9%, compared with 8% of men).

Minority ethnicity respondents were more likely than white respondents to have purchased a watch with a button battery in the past six months (12%, compared with 8% of white respondents).

White respondents were more likely to not have purchased ay items that contain button batteries in the past 6 months (63%, compared to 57% of minority ethnicity respondents).

Figure 30. Purchased anything with a button battery in the last 6 months



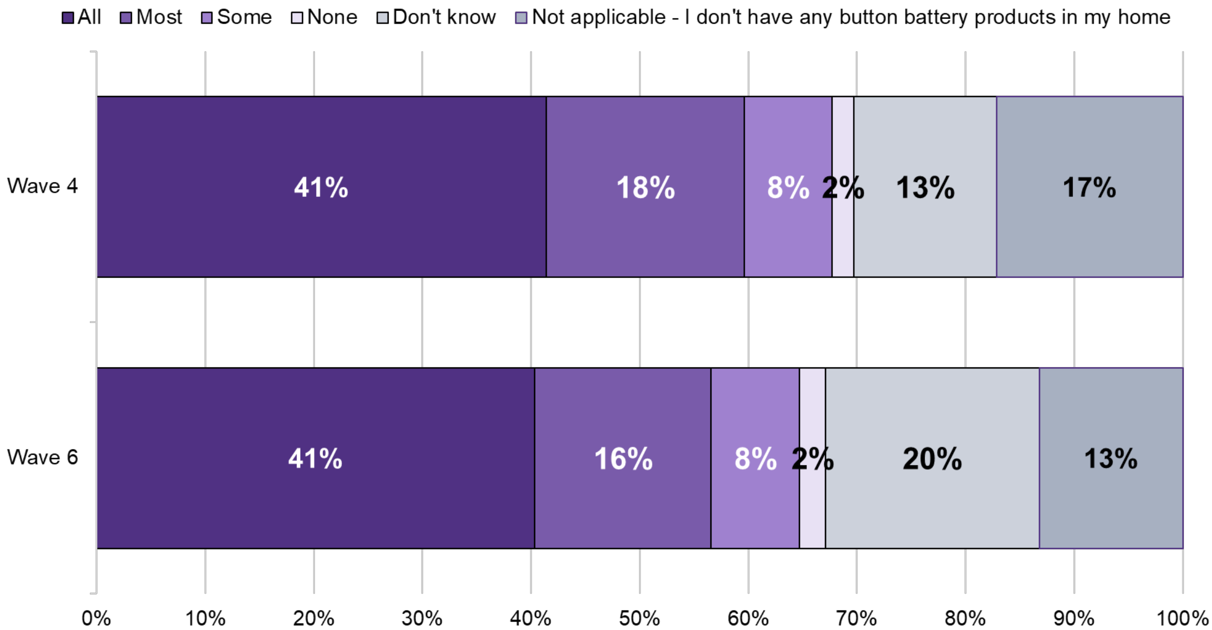
Q: Button batteries (sometimes known as coin batteries) are small flat circular batteries, often around 1(button) to 2 (coin) cm diameter. In the past six months, have you purchased any of the following that contain button batteries? Base: All respondents in magnets and button battery section (W3=6,795; W4 3,384; W6=3,396)

As with wave four, when this question was last asked, two fifths of the UK public report that all the items in their home which have button batteries have them in secured compartments (41% in W4, compared with 41% in W6). A smaller proportion reported that most have secured compartments (16%), and half this proportion reported that some have secured compartments (8%). Only 2% reported that none of them are in secured compartments, the same proportion as wave four. There was a decrease this wave of respondents reporting that they don't have any button battery products in their home (17% in W4, compared with 13% in W6), but an increase in those reporting that they don't know what proportion are secured (13% in W4, compared with 20% in W6).

Women are more likely to report that they don't know to what extent the products in their homes have secured compartments for their button batteries (22%, compared with 18% of men). They are also more likely to not have any button battery products in their home (15%, compared with 11% of men).

Younger respondents are the least likely age group to report that all the button battery products in their home have secured compartments for the battery, less than all other age groups (34% of those aged 18 to 29, 41% of those aged 30 to 49, 45% of those aged 50 to 64, 42% of those aged 65+). They are also the least likely age group to have any products with a button battery (17% of those aged 18 to 29, 12% of those aged 30 to 49, 12% of those aged 50 to 64, 13% of those aged 65+).

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=3,384, W6=3,396)

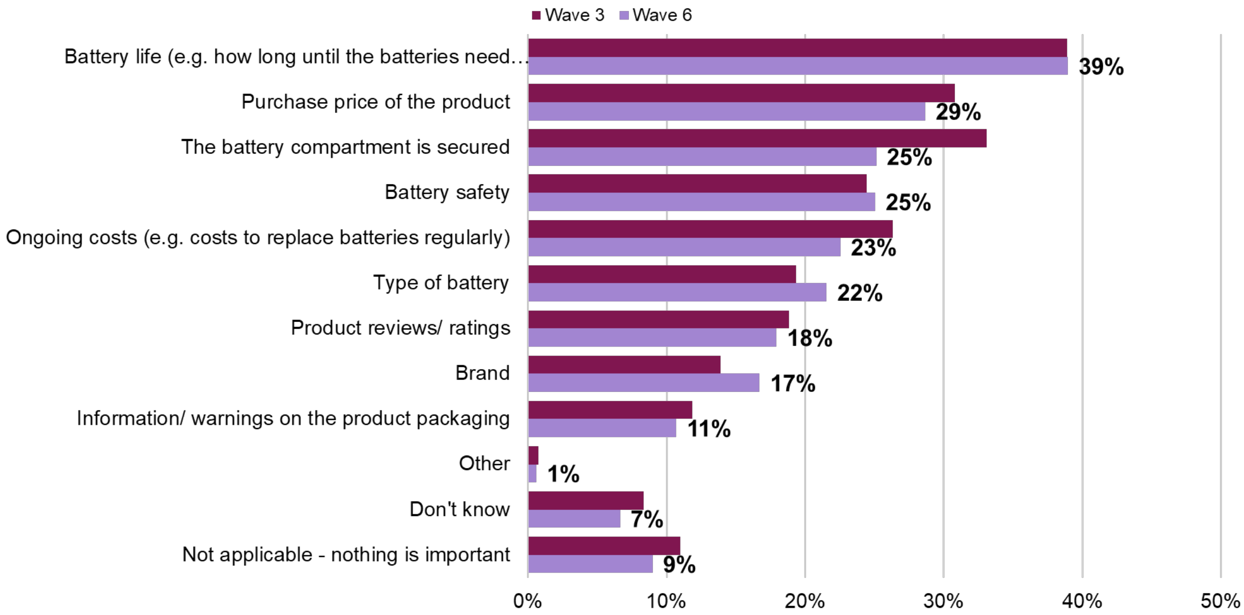
Those who bought button battery products in the past six months were asked what aspects were important when purchasing. The top concern was the battery life of the product (39%), followed by the price of the product (29%) and the battery compartment being secured (25%). Battery compartment being secured has reduced in importance when buying an item compared to wave three, when this question was lasted asked (33% in W3, 25% in W6).

Those under 30 years old are most likely to find the brand of the button battery product important when purchasing, compared to other age groups (26% of those aged 18 to 29, 12% of those aged 30 to 49, 16% of those aged 50 to 64, 18% of those aged 65+). They are also more likely than other age groups to find the information/ warnings on the product packaging to be important (18% of those aged 18 to 29, 8% of those aged 30 to 49, 9% of those aged 50 to 65, 11% of those aged 65+). Respondents aged 65 and over are the most likely to find the secured compartment for the button battery in the product important (23% of those aged 18 to 29, 22% of those aged 30 to 49, 24% of those aged 50 to 64, 34% of those aged 65+).

Ethnic minority respondents were more likely than white respondents to have found the brand of the product important (24%, compared with 15% of white respondents).

White respondents were more likely to find it important that the battery compartment is secured (27%, compared with 14% of ethnic minority respondents).

Figure 32. Important aspects when buying an item which uses button batteries



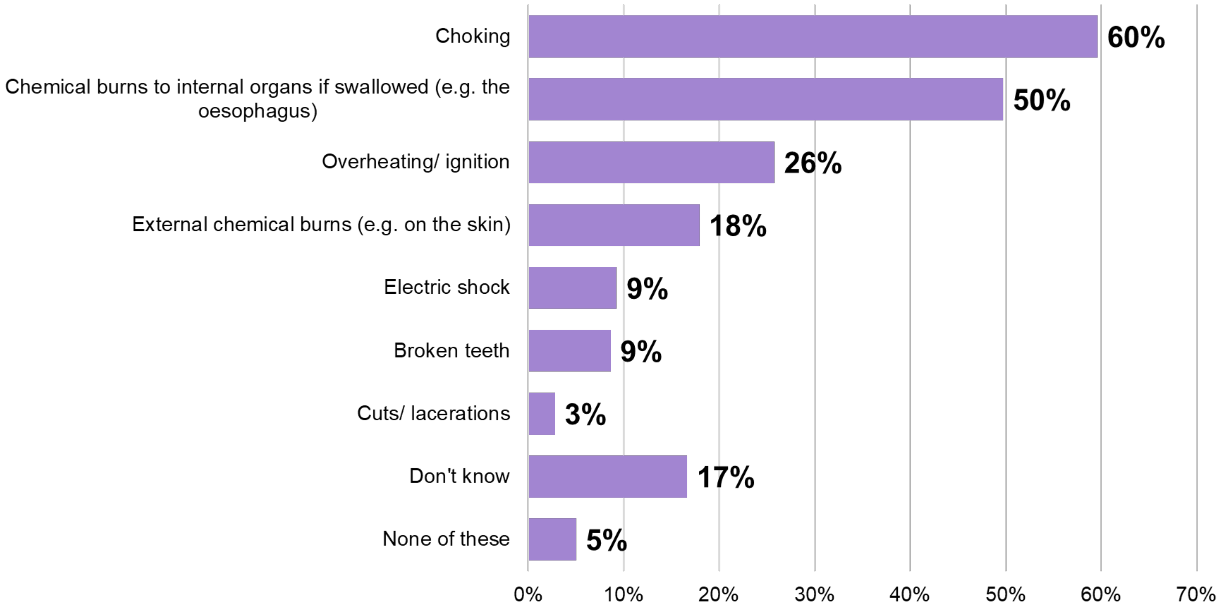
Q: Which, if any, of the following are important to you when buying an item which uses button batteries?
Base: All in magnets section who bought a button battery item (W3=1,692, W6=895)

The UK public identified potential hazards associated with coin/ button batteries from a list provided. The most common hazard selected is choking (60%), followed by chemical burns to internal organs if swallowed (50%) and overheating/ ignition (26%). Only 5% of respondents said that none of the options listed are a potential hazard, although 17% said that they do not know.

Women are more likely to identify choking (63%, compared with 56% of men) or internal chemicals burns (53%, compared with 46% of men) as potential hazards compared to men. Men are almost twice as likely to report that none of the options listed are a potential hazard associated with coin/ button batteries (7%, compared with 4% of women).

Younger respondents aged 18 to 29 were more likely than other age groups to believe that electric shock is a potential hazard (20% of those aged 18 to 29, 10% of those aged 30 to 49, 6% of those aged 50 to 64, 3% of those aged 65+). They are also more likely than other age groups to identify external chemicals burns as a potential hazard (25% of those aged 18 to 29, 20% of those aged 30 to 49, 16% of those aged 50 to 65, 11% of those aged 65+). Respondents aged 65+ were the most likely to say that they didn't know what hazards were associated with coin/ button batteries (17% of those aged 18 to 29, 15% of those aged 30 to 49, 13% of those aged 50 to 64, 23% of those aged 65+).

Figure 33. Potential hazards associated with button batteries



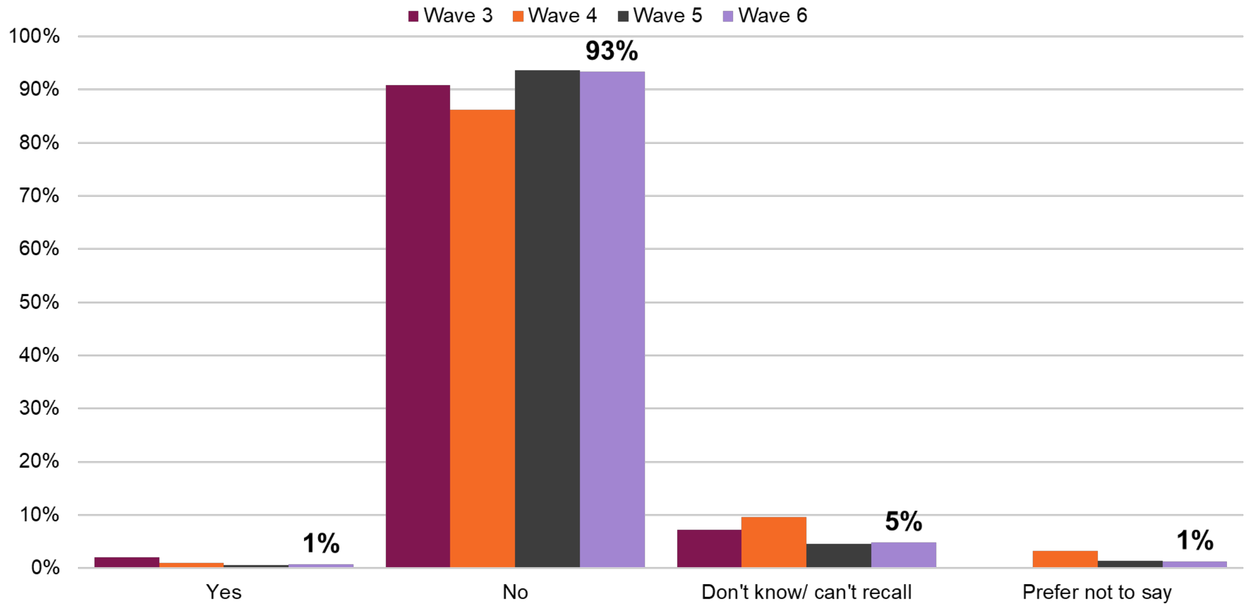
Q: Which, if any, of the following do you think is a potential hazard associated with coin/ button batteries?
Base: All respondents in magnets and button battery section (W6=3,396)

A very small percentage of respondents (1%) report that they or someone in their household have swallowed or nearly swallowed a small battery such as a coin/ button battery. This is consistent with the previous wave of data (1% in W5), although a slight but statistically significant reduction from wave three when this question was first asked (2%).

Men are more likely to report that they do not know whether they or someone in their household has swallowed a button battery (6%), compared to women (4%). This is also the case for younger people (8% of those aged 18 to 29, 6% of those aged 30 to 49, 3% of those aged 50 to 64, 1% of those aged 65+).

Consistent with wave five, 2% of those with children up to five years old in their household reported that they or someone in their home had swallowed or nearly swallowed a small battery.

Figure 34. Safety incidents with button batteries



Q: For the following question, please remember that your answers will always be treated anonymously and confidentially. Have you or someone in your household ever swallowed, or nearly swallowed a small battery, such as a button battery, or coin battery? If yes, please describe the incident in the box below giving as much detail as possible.
Base: All respondents (W3=10187, W4=10156, W5=10182), Base: All respondents in magnets and button battery section (W6=3,396)

Smart devices

In wave six, questions on smart devices were shown to approximately a third of all respondents, allocated randomly (n=3,407). Exact base sizes for specific questions are shown below each chart.

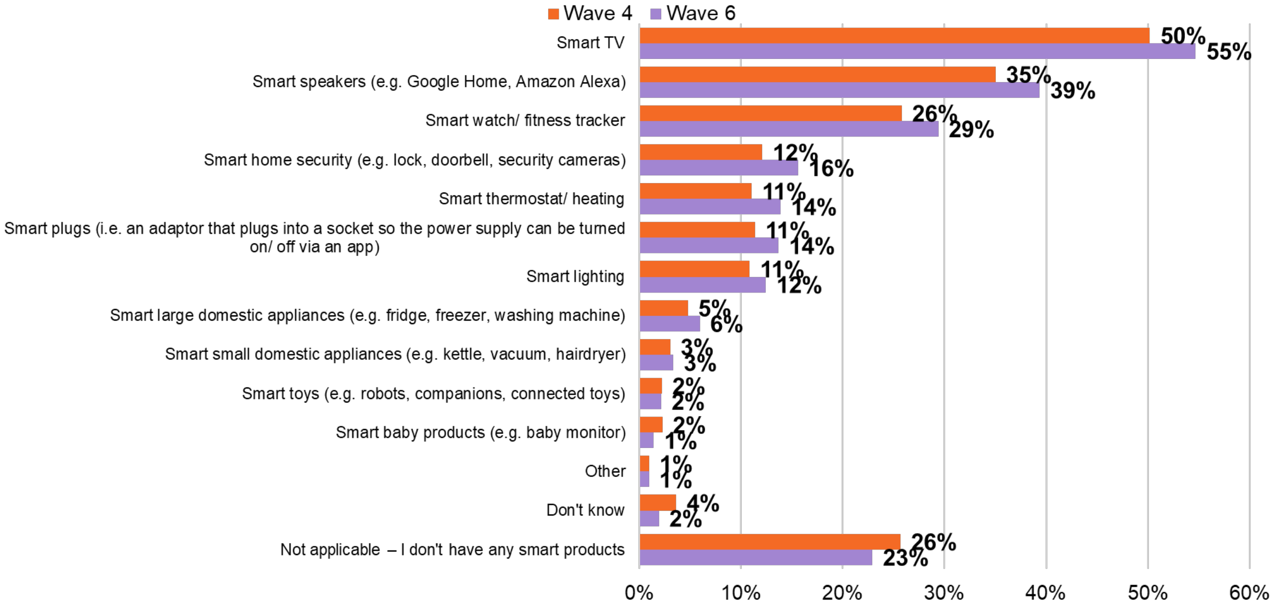
Consistent with previous waves, around one in ten (11%) of those who purchased an electrical appliance in the last six months had bought a smart home device (e.g. smart speaker, smart thermostat). Around a quarter of those who purchased a large domestic appliance said their product is “smart” (25%) – consistent with wave five (24%) and four (25%), but a significant increase from waves three and earlier (18% in W3, 19% in W2, 14% in W1).

When asked about all possible smart devices they own or have access to, ownership has slightly increased to three-quarters of all UK adults having access to a smart device in their home (71% in W4, compared with 75% in W6). The most common smart device continues to be a smart TV (55%), followed by smart speakers such as Amazon Alexa etc (39%), and smart watches/ fitness trackers (29%).

In wave four, there was a reported increase in homeowners having smart security and this upward trend has continued (12% in W2, 16% in W4, 19% in W6). However, there has now also been an increase in the proportion of renters reporting access to smart home security (6% in W2, 8% in W4, 11% in W6). However, while ownership of smart large domestic appliances has risen among homeowners (4% in W2, 5% in W4, 7% in W6), the same is not seen amongst renters (4% in W2, 4% in W4, 6% in W6).

Asian adults are the most likely to have smart baby products (5%, compared with 1% of white adults). They are also the most likely to have smart home security (25%, compared with 15% of white adults).

Figure 35. Smart products UK 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 (W4=3,395; W6=3,407)
**Note: answer list changed between wave two and wave four, wave two figures not charted.*

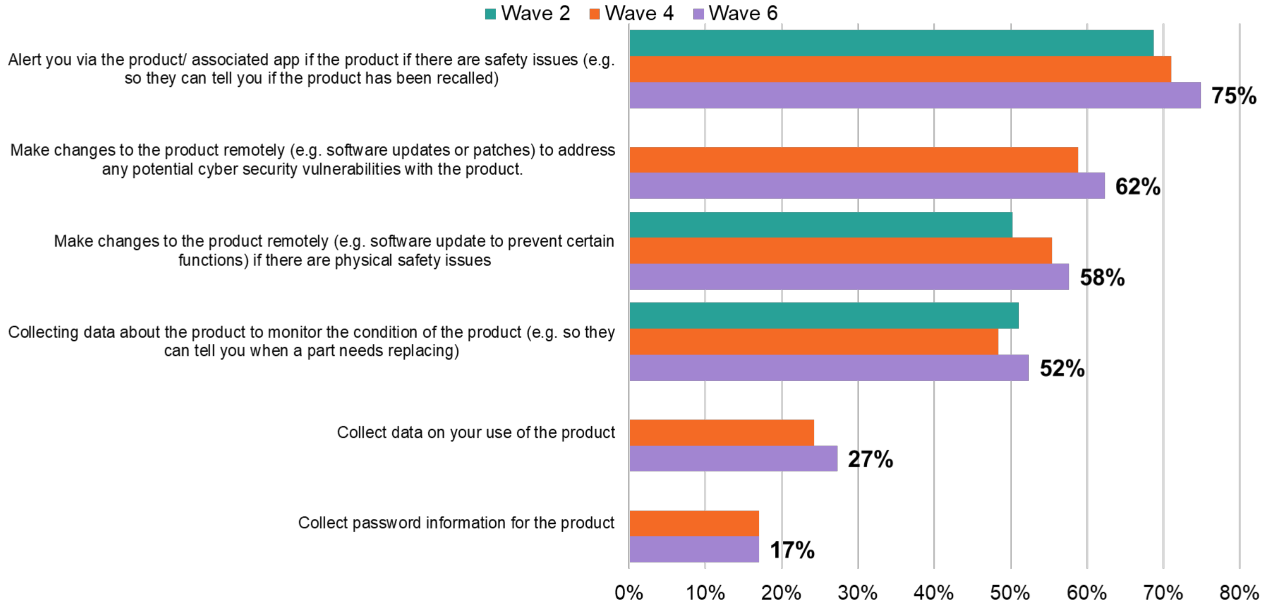
Fewer people leave their smart device to perform activities when they are not present. Now, less than half of smart device owners report doing this (51% in W2, 48% in W4, 46% in W6). Those with children in the household remain most likely to do this (53%, compared with 42% without children), but the proportion has fallen for both groups compared to previous waves.

Most people who own/ access smart devices do connect them to the internet. Consistent with wave four, nine in ten of those who have a smart TV (92% in W4, 93% in W6) or smart speakers (91% in W4, compared with 92% in W6) have connected them to the internet. However, connection to the internet drops off for other devices where it may not be essential for normal functioning of the devices – such as large domestic appliances (45% in W4, compared with 41% in W6) or small domestic appliances (49% in W4, compared with 41% in W6).

Consumers are increasingly comfortable with manufacturers sending alerts via the product/ app in the event of a safety issue (69% in W2, 71% in W4, 75% in W6). They are also increasingly comfortable with manufacturers making changes remotely in the case of physical safety issues (50% in W2, 55% in W4, 58% in W6) or cyber security vulnerabilities (59% in W4, 62% in W6).

Controlling for ownership of a smart device, the rise in comfort has predominately come from younger adults – 83% of under 30s who own a smart device are now comfortable with alerts in the event of a safety issue (78% in W2, 78% in W4) and 69% are comfortable with remote changes due to physical issues (58% in W2, 65% in W4).

Figure 36. 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=4,118; W4=3,395; W6=3,407)

As consumers become more comfortable with remote changes to fix cyber security issues, they are becoming less considerate of cyber security in their initial purchase. The proportion of smart device owners reporting that they considered cyber security before purchase has fallen from 66% in wave four to 62%.

This is particularly evident amongst those with a low education level; consideration of cyber security prior to purchase has fallen from 62% in wave four to only 53% in wave six. There is no corresponding change amongst smart device owners with medium (66% in W4, 65% in W6) or high education levels (71% in W4, compared with 69% in W6).

Consistent with previous waves, just over half of those with a smart device say they consider the overall physical safe use of smart and non-smart devices the same amount (55% in W2, 53% in W4, 55% in W6). A quarter continue to report that they consider the physical safety more when purchasing smart devices (26% in W2, 27% in W4, 25% in W6)

E-labelling

In wave six, questions on e-labelling were shown to approximately a quarter of all respondents, allocated randomly (n=2,530). Exact base sizes for specific questions are shown below each chart.

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 37. Conformity assessment mark summary

Mark image	Name	Definition/ 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 Furniture and Furnishings (Fire Safety) Regulations	Furniture/ furnishings

Following a decline between waves two and four (when this question was last asked), awareness of conformity assessment marks has increased significantly in wave six across all five product types tested. The proportion of respondents reporting that they would look for none of these marks has fallen significantly, returning to the same level as was seen in wave two for all products.

The same trend is seen for uncertainty surrounding conformity of assessment marks. While this remains high for all products listed (close to a quarter of adults report that they did not know what mark they would look for when purchasing a product), the proportion who are unsure has fallen slightly to return to wave two levels, following an increase in wave four. When purchasing electrical appliances, around one in four would look for the CE mark (41%) or the BSI kitemark (36%); both of these represent increases compared to wave four, returning to the same incidence as was reported in wave two. These two marks are also the most commonly looked for when buying large domestic appliances (36% CE mark, 35% BSI kitemark). Again, while these figures are increases from wave four, this is simply a return to the level seen in wave two.

One in three (34%) report they would look for the Age Warning Logo when purchasing baby products, a significant increase compared to wave four (28%) and returning to a similar proportion seen in wave two (33%). Those with children in their household are not statistically more likely to do so; 36% report that they would look for this mark, compared to 34% of those without children. There is also no significant variation when looking across the ages of children in the household.

A similar proportion (35%) would look for the Age Warning Logo when purchasing toys; while this is 10 percentage points higher than wave four, it is the same level as in wave two. Those with children in the household are more likely to look for the Age Warning mark than those without children (42% with children, compared with 32% without). It is particularly relevant for those with young children in the household – half of those with a child up to five years old say they would look for this marking on toys (50%) compared to 37% of those with a child over 18.

One fifth (22%) report that they would look for the Lion Mark when purchasing toys. Those with children in their household are again more likely to do so (25%, compared with 20% without), although the ages of the children has little effect here.

Nearly half (46%) of UK adults identify the display label as a mark they would look for when purchasing furniture/furnishings, again higher than wave four but the same level as wave two. Homeowners are more likely to look for this mark on furniture than renters (49%, compared with 42% of renters).

Figure 38. Conformity assessment marks looked for on products[2]

	Electrical appliances	Baby products	Toys	Large domestic appliances	Furniture / furnishings
CE mark	41% (W4 36%) +	26% (W4 24%) +	30% (W4 26%) +	36% (W4 33%) +	24% (W4 22%)
UKCA mark	12% (W4 8%) +	8% (W4 6%) +	8% (W4 5%) +	13% (W4 8%) +	9% (W4 7%) +
Age Warning Logo	7% (W4 5%) +	34% (W4 28%) +	35% (W4 25%) +	5% (W4 4%)	5% (W4 4%)

[2] 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

	Electrical appliances	Baby products	Toys	Large domestic appliances	Furniture / furnishings
BSI Kitemark	36% (W4 33%) +	25% (W4 23%)	20% (W4 19%)	35% (W4 31%) +	26% (W4 24%)
Lion Mark	4% (W4 3%) +	14% (W4 11%) +	22% (W4 16%) +	4% (W4 4%)	5% (W4 4%)
Radio Equipment Pictogram	8% (W4 5%) +	6% (W4 4%) +	9% (W4 6%) +	8% (W4 5%) +	6% (W4 4%) +
Display label pursuant to Regulation 10 FFRs	10% (W4 9%) +	15% (W4 12%) +	10% (W4 8%) +	11% (W4 9%) +	46% (W4 36%) +
None of these	13% (W4 17%) -	13% (W4 18%) -	13% (W4 18%) -	14% (W4 17%) -	13% (W4 18%) -
Don't know	26% (W4 29%) -	28% (W4 30%) -	26% (W4 30%) -	28% (W4 31%) -	24% (W4 27%) -

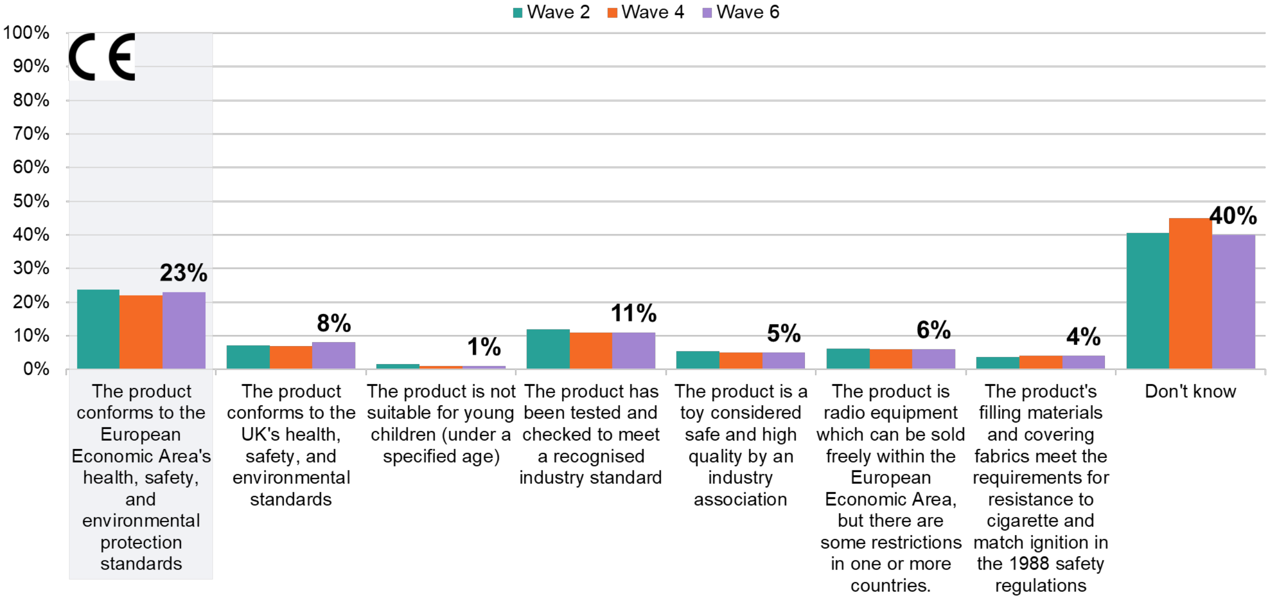
Q: Which, if any, of the following marks would you look for when purchasing each of the following types of products?
Base: All in E-labelling section (W4=5,089; W6=2,530)

As was the case in previous waves, the key differentiator in likelihood to check for each of these labels is age. Specifically, younger adults are more likely than older adults to report that they would not look for any of the listed labels or markings across the product types tested. For example, 15% of those aged 18 to 29 would not look for any marking on an electrical appliance, compared to 7% of those aged 65 and over. However, younger respondents are more likely to be unsure – 33% of 18 to 29 year olds report not knowing if they would look for marks, compared to a quarter of those aged 65 and over (26%).

Survey respondents were asked to match each conformity assessment mark to a definition of its meaning. Just under one in four (23%) identified the CE Mark as indicating that the conforms to the European Economic Area's health, safety, and environmental protection standards, unchanged from the 22% of respondents saying this when last asked in wave four. Also consistent with wave four, the most common response is uncertainty around the definition (40% chose "don't know").

Consistent with wave four, men are more likely to correctly identify the meaning of the CE mark (26%, compared with 21% of women). The strong education gradient also remains, with those of high education attainment (29%) more likely than those of medium (24%) or low (16%) education level to select the correct meaning for the CE mark.

Figure 39. Definition of CE mark



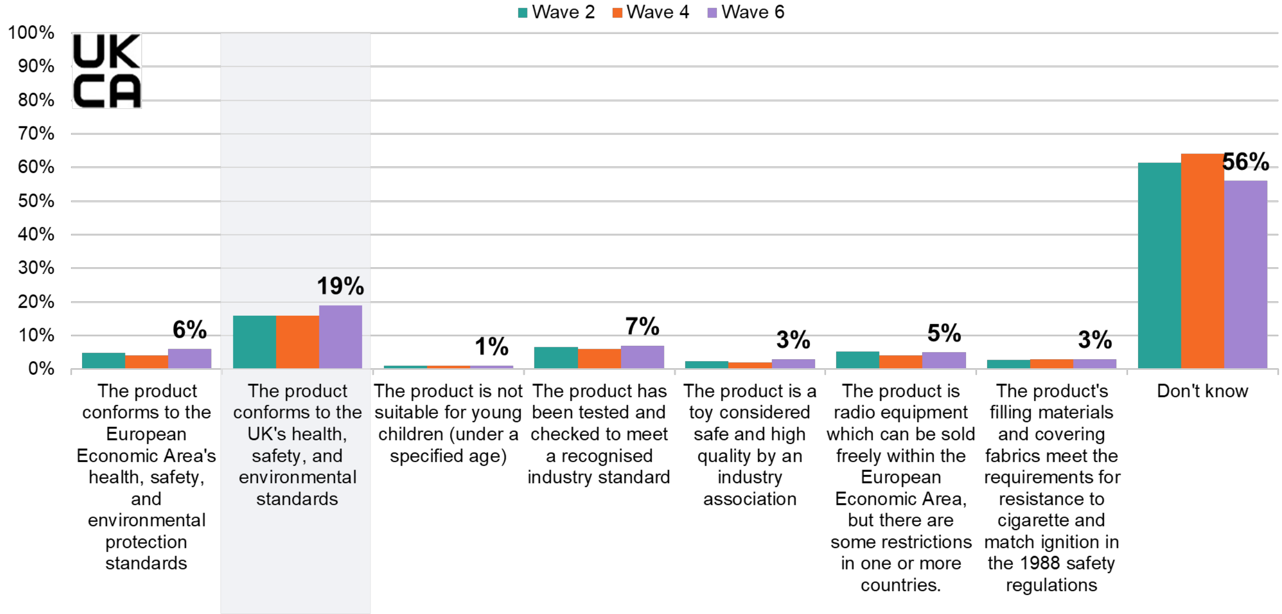
Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

Ability to correctly identify the UKCA mark as meaning that the product conforms to the UK’s health, safety and environmental standards has risen by three percentage points from 16% in wave four to 19% in wave six. However, knowledge of this mark overall is still low, with a majority (56%) saying that they do not know what this mark means.

The age difference in knowledge of the UKCA mark has widened this wave, with increasing awareness amongst younger adults. Three in ten 18 to 29 year olds (30%) correctly identify its meaning and knowledge among this youngest age group has risen by 10 points since wave four, when 20% correctly identified the mark’s meaning. This rise is not seen amongst older adults – only 12% correctly identify the UKCA’s definition, unchanged from wave four.

In wave four, there was a difference by gender in correctly identifying the UKCA definition, but this is no longer the case (20% of men and 19% of women). This is driven by a significant rise in the proportion of women correctly defining the UKCA mark, from 14% in wave four to 19% in wave six.

Figure 40. Definition of UKCA mark

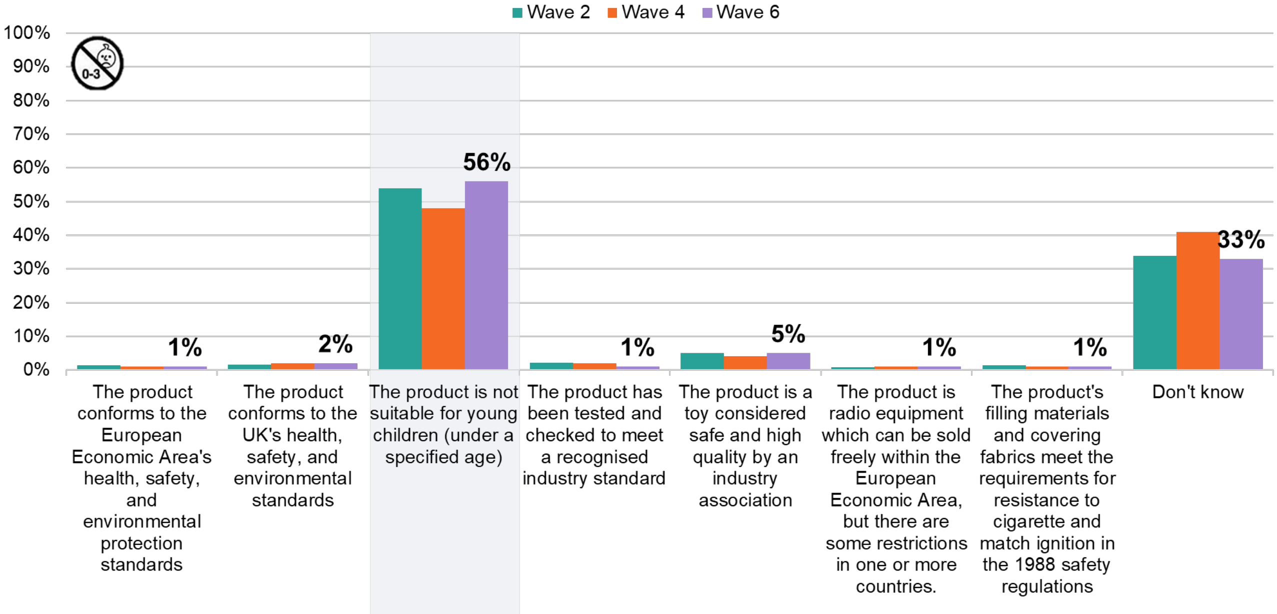


Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

As the proportion who say they look for the Age Warning label has increased this wave to return to wave two levels, so has the proportion able to correctly identify its meaning. A majority (56%) say that this label indicates that the product is not suitable for young children (under a specific age), up from 48% in wave four and statistically level with 54% saying this in wave two. This mark is by far the most likely to be correctly identified of all of those shown in the survey.

As has been reported in previous waves, there is no difference between those who have children in their household and those who do not in their likelihood to correctly identify the Age Warning label (both 56%). However, women are more likely than men to know what this label means (59%, compared with 52% of men).

Figure 41. Definition of Age Warning label

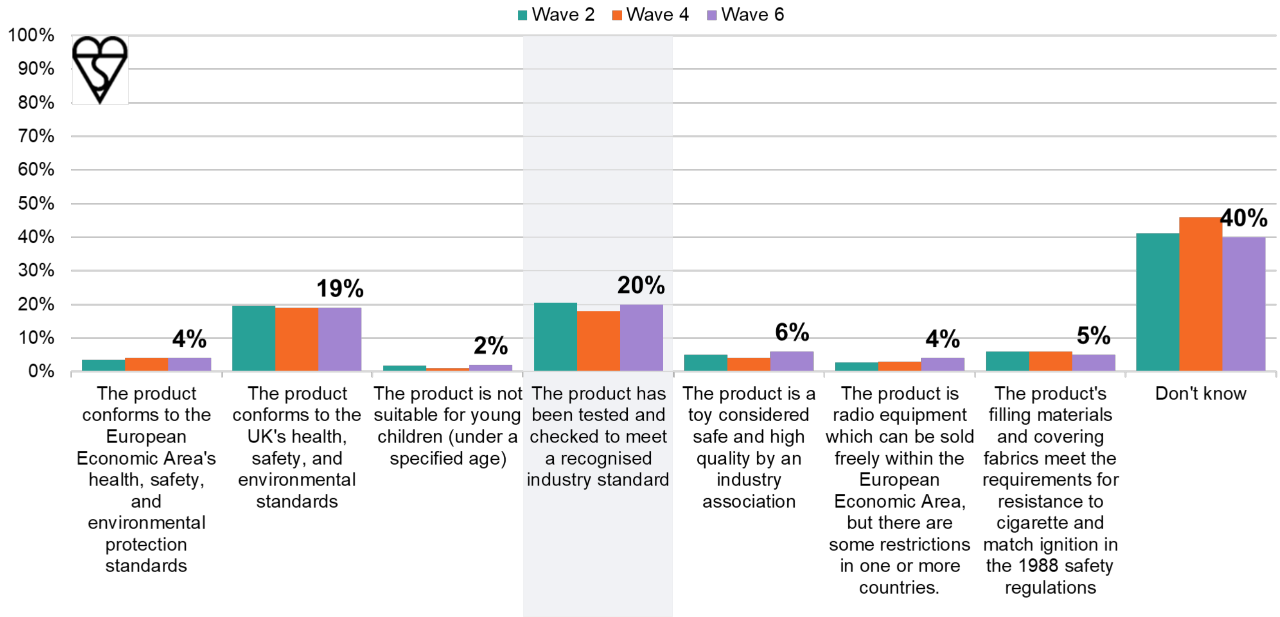


Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

One in five (20%) identify that the BSI Kitemark means that the product has been tested and checked to meet a recognised industry standard, a two-point increase compared to wave four. As in previous waves, a similar proportion of people believe the BSI Kitemark indicates that the product conforms to the UK's standards (19%).

There are few demographic differences in the choice of definition for the BSI Kitemark. Older adults are more likely than younger adults to give the correct definition (15% of those aged 18 to 29, compared with 23% of those aged 65+), but they are also more likely to say it means the product conforms to UK standards (12% of those aged 18 to 29, compared with 23% of those aged 65+).

Figure 42. Definition of BSI Kitemark

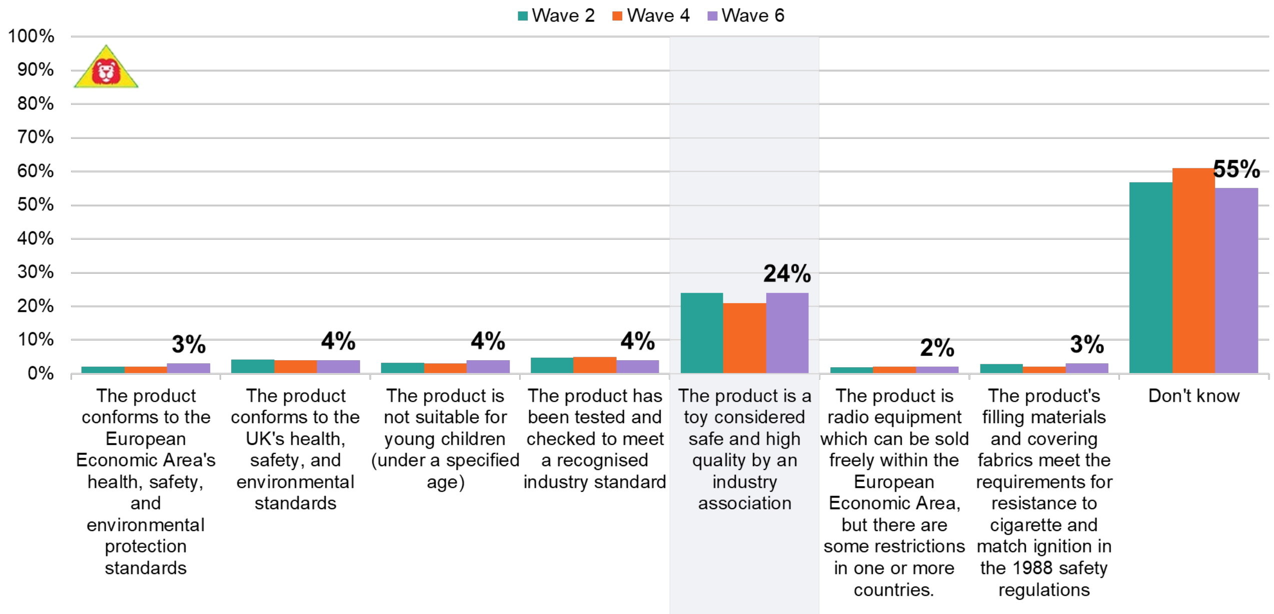


Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

Just under one in four (24%) identify that the Lion Mark means the product is a toy considered safe and high quality by an industry association, a slight increase from wave four (21%) and a return to the proportion seen in wave two (24%).

As with the Age Warning label, likelihood to correctly identify the definition is not statistically different regardless of whether respondents have children in their household or not (both 24%). Similarly, correct identification of the definition does not change depending on the age of the child in the household.

Figure 43. Definition of Lion Mark

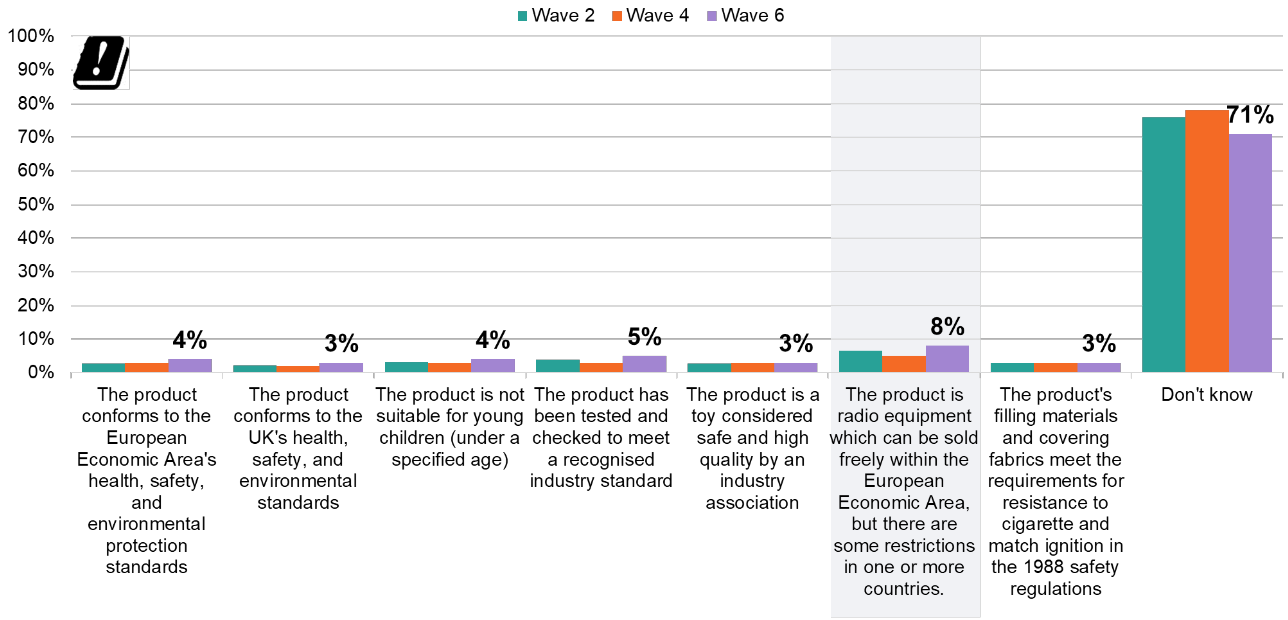


Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

The pictogram mark continues to be the least well known of the marks shown, with just 8% 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. Seven in ten (71%) report they do not know the definition.

Knowledge of the Pictogram is low across all groups, with the only notable difference being by age; 11% of 18 to 29 year olds correctly identified it, compared with 6% of those aged 65+.

Figure 44. Definition of Radio Equipment Pictogram

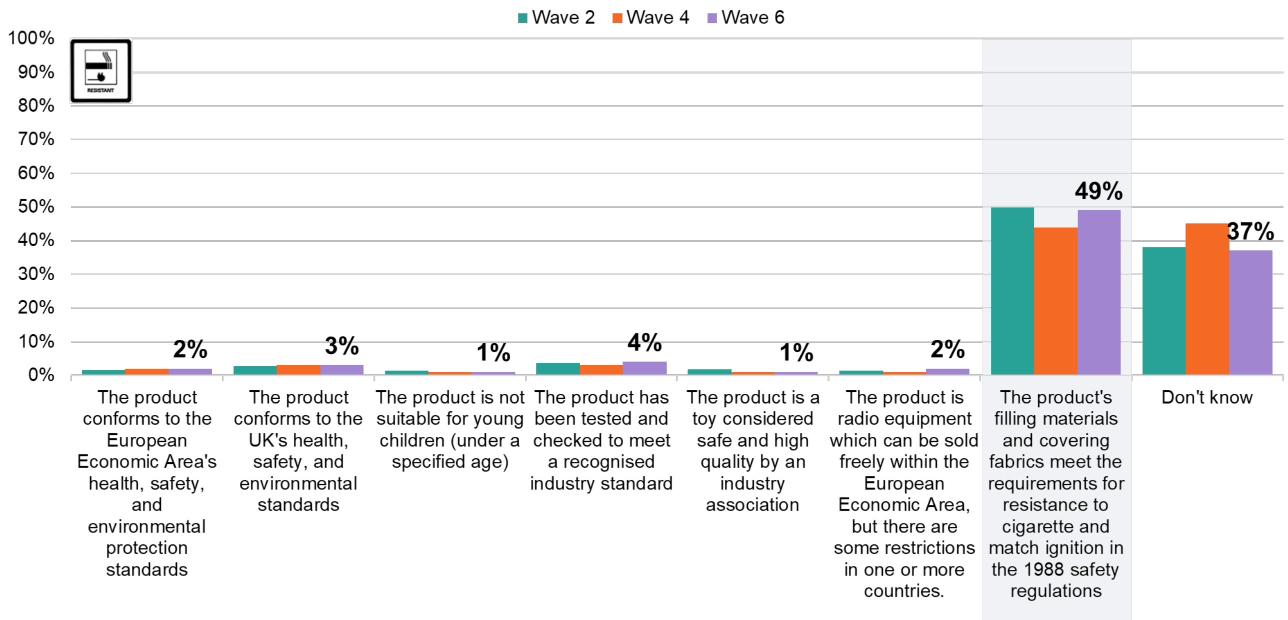


Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

Around half of adults (49%) 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 Furniture and Furnishings (Fire Safety) Regulations (1988). This represents a return to the same proportion as seen in wave two (50%).

Knowledge of this label is higher among women (52%, compared with 46% of men) and those with high educational attainment (55%, compared with 49% with medium educational attainment and 43% with low educational attainment).

Figure 45. Definition of Display Label Pursuant to Regulation 10 FFRs (Fire Resistance)



Q: Which, if any, of the following definitions comes closest to what you think each of the following marks mean?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

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.

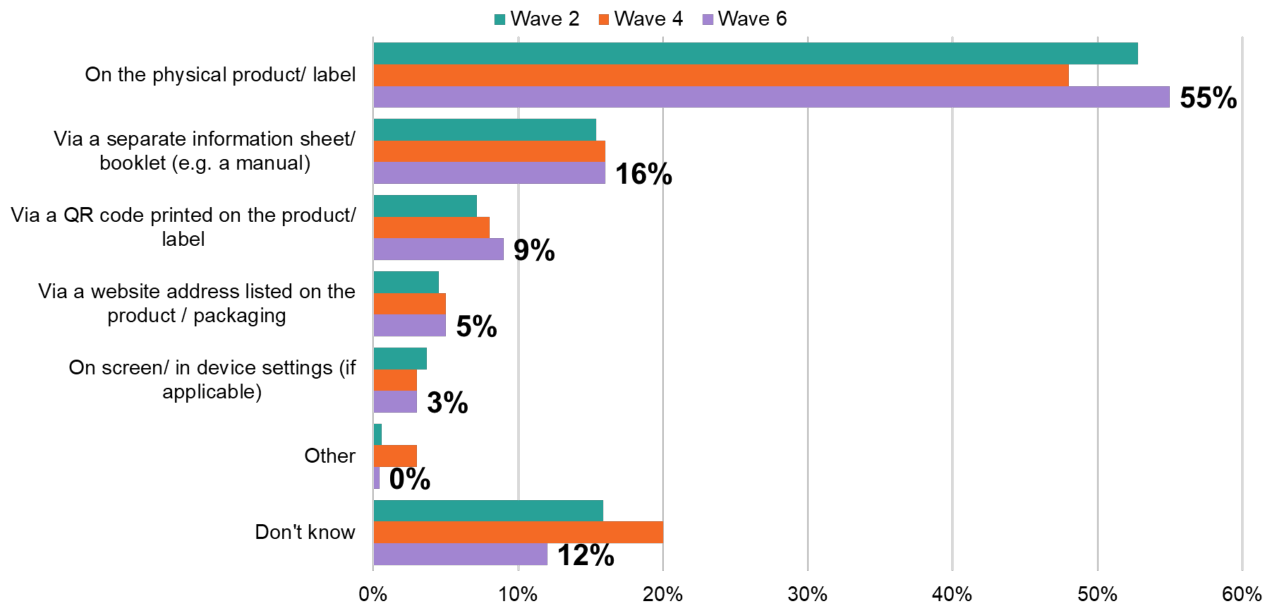
As was seen in waves two and four, the most popular place where people would like to see this information is on the physical product/ label (55%). This has risen by seven percentage points since wave four. Those asked about furniture/furnishings in this question are particularly likely to select this option (62%), while those asked about large domestic appliances are less likely (49%).

The next most popular location for safety information is via a separate information sheet/booklet (e.g. a manual), with 16% of respondents selecting this. Those thinking about electrical appliances (26%) and large domestic appliances (21%) are particularly likely to choose this. In comparison, this sits at just over one in ten for all other products (14% for baby products, 14% for furniture/furnishings, 12% for toys, 10% for cosmetics).

The proportion who would like to find safety information via a QR code printed on the product/label is 9%, a statistically insignificant change from wave four. There is little variance by product in likelihood to select this option.

Earlier in this section, it was noted that there was a rise in the proportion who would look for conformity assessment marks on products, after low scores in wave four. A similar pattern is seen here, with the proportion of respondents who say they do not know where they would prefer to access safety information is 12%, eight points lower than in wave four.

Figure 46. Preference for labelling of safety information



Q: For the following question, by "product label" we mean a permanent label or marking attached to the physical product. In which ONE, if any, of the following ways would you prefer to access safety information about [category]?
Base: All in E-labelling section (W2=5,135; W4=5,089; W6=2,530)

As was the case in wave four, younger respondents are more likely to express a preference for non-traditional methods of seeing safety information, such as a QR code (11% of those aged 18 to 29, compared with 4% of those aged 65+) or on screen/ in device settings (7% of those aged 18 to 29, compared with 1% of those aged 65+), while older people lean towards seeing the information on the physical product/label (48% of those aged 18 to 29, compared with 62% of those aged 65+).

There is a gap between those living with a disability and those without, specifically for seeing the information via a separate information sheet/booklet (e.g. a manual); those living with a disability are seven points more likely to select this option (21%, 14%)

Home Battery Energy Storage

In wave six, questions on battery storage were shown to approximately a third of all respondents, allocated randomly (n=3,439). Exact base sizes for specific questions are shown below each chart.

Overall, around half (49%) of respondents have not heard of home battery energy storage before taking part in the survey. A similar proportion (47%) were already aware of this technology but do not have it themselves. Awareness of home battery energy storage has therefore increased since the previous two waves where this question was included, where 39% (W2) and 45% (W4) reported being aware of this technology.

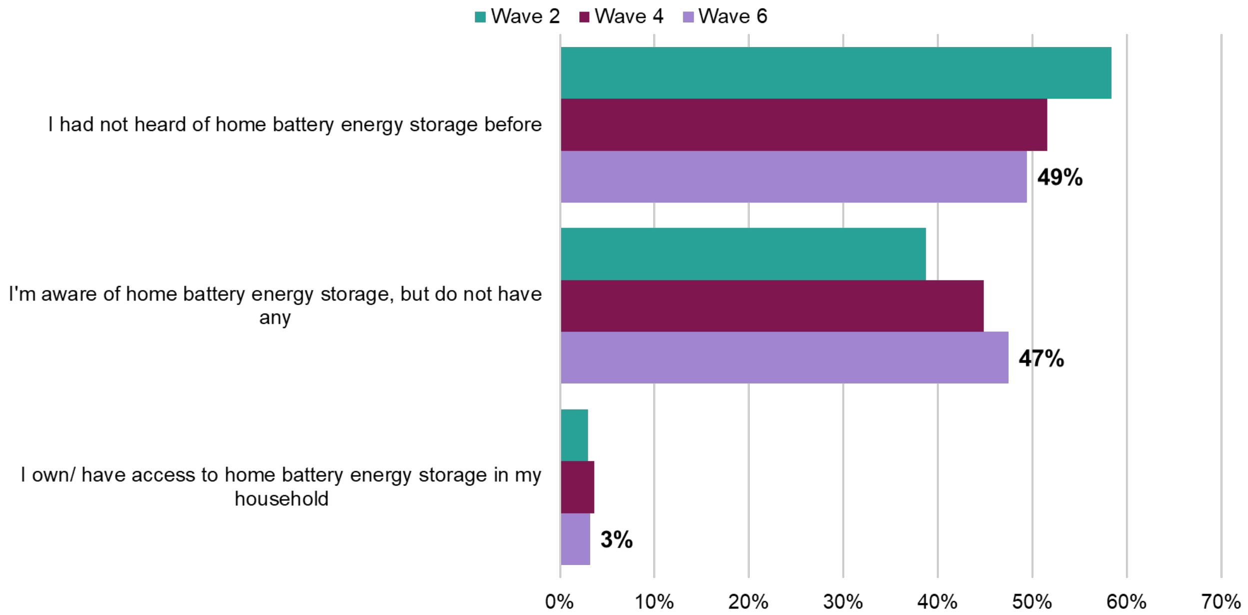
While awareness has risen over time, the proportion who actually use home battery energy storage has not. Just 3% own/ have access to home battery energy storage in their household, which compares to 4% in wave four and 3% in wave two, a difference which is not statistically significant.

A number of demographic trends are visible in terms of awareness. Substantial gender and social class divides in awareness remain; men (57%) and those from higher social grades (50% ABC1) are most likely to say they are aware of home battery energy storage but do not have access to any. The size of these gaps are similar to that observed in previous waves, with awareness rising across gender and social groups.

Home ownership status is also linked to awareness; nearly half of those who own their home (54%) are aware of home battery energy storage but do not have any, compared with 40% of renters. Despite these differences there is no significant difference among renters and homeowners when looking at those who own or have access to home battery energy storage in their household (3% of home owners, compared with 2% of renters).

Among educational attainment, there is a divide between those of low educational attainment (40%) and those with medium (49%) and high educational attainment (52%) in terms of being aware of it but not having access to it. Owning/ having access to it in their household is consistent across all educational attainment levels (3%).

Figure 47. Awareness of home battery energy storage



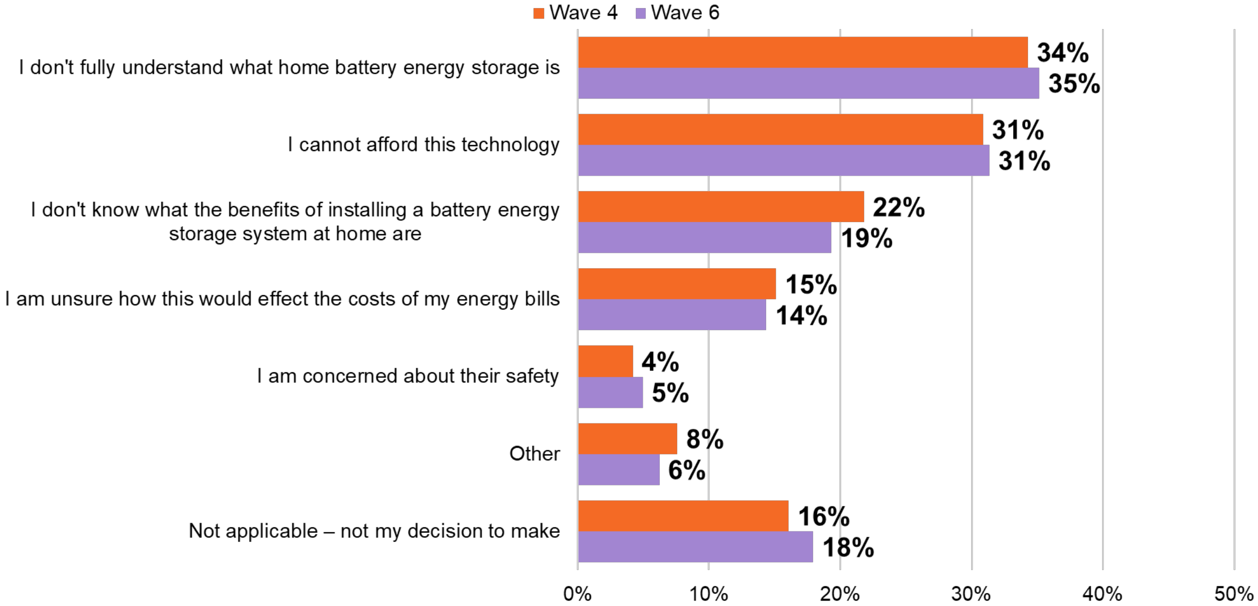
Q: For the following question, by "home battery energy storage" we mean facilities that use batteries to store energy for use at a later time. This allows users to buy and sell electricity at times that are financially beneficial. They can be connected to solar panels which generate energy during the 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, W6=3,439)

When looking at the reasons among those who do not currently have home battery energy storage, the top reason mentioned with a third (35%), was that they don't fully understand what home battery energy storage is. This is followed by three in ten (31%) saying that they cannot afford this technology, while 19% state that they do not know what the benefits of installing a battery energy storage system at home are.

Among those who don't have home battery storage, reasons for not having it differ among the genders, with women being more likely not to have it due to not understanding what it is (43%, compared with 27% of men). Men are more likely to not be able to afford it (35%, compared with 27% of women) or be concerned about safety (6%, compared with 4% of women).

It is interesting to note that homeowners are more likely than those who currently rent to cite an inability to afford this technology (37%, compared with 25% of renters), as well as a lack of knowledge of its benefits (23%, compared with 13% of renters).

Figure 48. Understanding of home battery energy storage



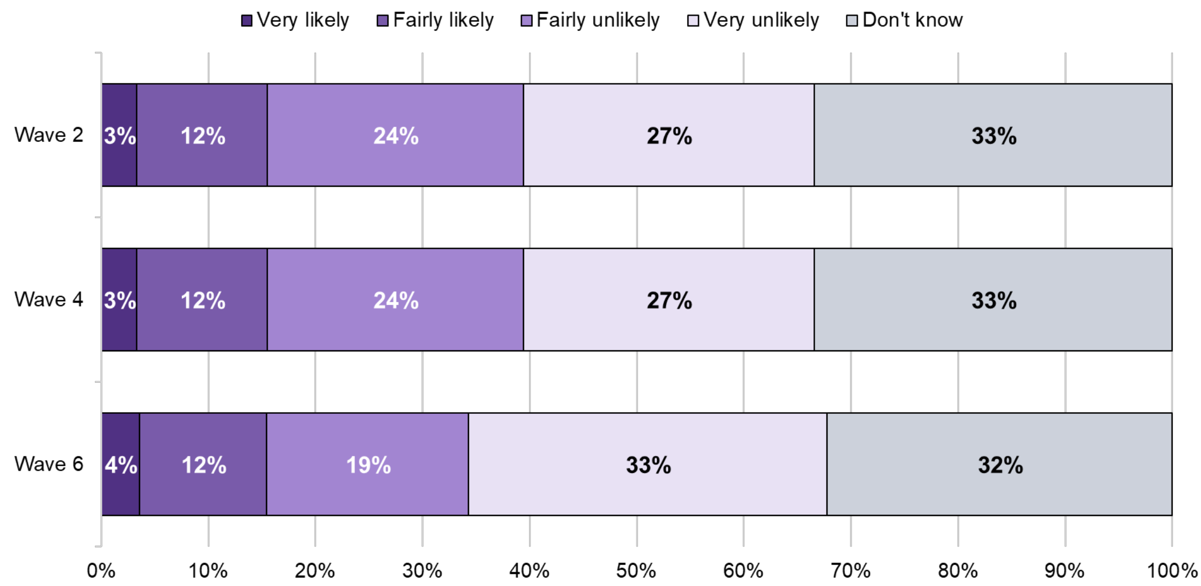
Q: You previously said you don't own home battery energy storage. Why is this? Please select all that apply.
Base: All who don't have home battery energy storage (W4=3,276, W6=3,335)

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. Just over half (52%) of this group report that they are unlikely to consider this, in line with wave two, but a slight increase from wave four (49%). There has been an increase in those saying that they would be very unlikely to consider getting battery energy storage (27% in W3, 30% in W4, 33% in W6).

Those previously aware of home battery energy store are more likely to say they are likely to take it up in the next five years (23%, compared with 8% of those who had not heard of it 8%). Those who had heard of home battery storage are over twice as likely to say that they do not know how likely or unlikely they would be to consider getting it (45%, compared with 19% among those who had heard of it).

Those most likely to say that they are likely to consider getting home battery energy storage in the next five years include men (21%, compared with 11% of women), those from higher social grades (17%, compared with 13% of C2DE) and respondents from an ethnic minority background (27%, compared with 14% of white adults).

Figure 49. 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 (W2=3,997, W4=3,276, W6=3,335)

Personal Light Electric Vehicles (PLEVs)

In wave six, questions on personal light electric vehicles (PLEVs) were initially shown to all respondents (n=10,216) and then subsequently to those who own a PLEV (n=625). Exact base sizes for specific questions are shown below each chart.

Ownership and charging behaviours

Consistent with wave five, 7% of the UK public currently owns or has access to a Personal Light Electric Vehicle (PLEV). The most common is an eBike/ Electrically Assisted Pedal Cycle (EAPC) (2%), followed by eScooters (2%) and hoverboards (2%).

Ownership of any PLEV remains highest for younger age groups and declines with age (9% of 18 to 29, 8% of 30 to 49, 5% of 50 to 64, 4% of 65+). Only eBikes do not have an age trend in ownership levels (4% of those aged 18 to 29, 3% all other age groups). Ownership of PLEVs is also highest in London (11%), more than any other UK region.

Those with children in the household are more likely than those without children to own/ have access a PLEV (12%, compared with 4% without).

A fifth of people who own an eBike say that it was converted from a manual bike (22%), and half of those said that they did the conversion themselves (50%). The likelihood of conversion falls with age (28% of 18 to 29, 29% of 30 to 49, 14% of 50 to 64, 11% of 65+), suggesting that older consumers are more likely to buy an 'off-the-shelf' eBike. Only one in five of those with a converted eBike say the conversion was done by a professional (19%).

Among those who own a PLEV, the purchase of separate batteries or chargers is rising. Overall, two-fifths have now purchased a battery/ charger for their PLEV (42%), rising from a third (35%) when wave five was conducted. Almost a quarter PLEV owners have now purchased a separate battery (14% in W5, compared with 24% in W6), and three in ten have bought a separate charger (25% in W5, compared with 30% in W6).

Separate batteries/ charges are bought from a range of places, with the most common being Amazon (31%) or the manufacturer (26%). Around a fifth purchased their separate battery/ charger from the remaining listed places such as an online marketplace, from the previous owner, or high street retailer (figure 49).

PLEV owners with children in the household are more likely than those without children to have bought a battery/ charger direct from the previous owner (25%, compared with 13% without).

The findings from the qualitative research show that most participants bought their PLEVs from a range of locations, most frequently from Halfords and Amazon, a few also mentioned Rolab and AliExpress. Most said that they purchased new PLEVs and also preferred to not buy used, as they would be concerned about the battery life, as well as any previous damages or modifications to the PLEV that could potentially affect the quality or safety of it. Others said they would not buy used PLEV, as warranty was important to them and they wanted to make sure that if something went wrong with the PLEV, they would be able to notify the seller or the manufacturer.

A few participants did buy used PLEVs, and most said that they ensured it was refurbished by a trustworthy company, or it was purchaser from a trusted seller. In terms of other safety measures, a few said that when buying a used PLEV, they would ensure that the battery and charger were supplied by the manufacturer.

"I have no idea if the person selling it has modified it in any way whether dangerous or not." (33, e-scooter ownership, not experienced an issue)

"I would be worried about reliability and battery range. I would only buy used electrical items if they were refurbished by a trustworthy company." (36, e-scooter ownership, not experienced an issue)

"I bought my used bike from a registered and well-regarded bike seller and repair shop." (52, e-bike ownership, not experienced an issue)

When buying a PLEV, the most important factors for participants were price, battery life, brand reputation, quality, customer reviews and warranty. Battery life tended to be the most important, as participants said they wanted to make sure that they could travel long distances without having to charge their PLEV frequently. When mentioning price, most said that they would want to make sure it is being balanced with quality and ensure that it is cost effective and would last a long time. Quality of the PLEV was mainly assumed when buying from a reputable brand, along with having good customer reviews.

"Battery range is crucial, you can't just stop and charge it enroute." (52, e-bike ownership, not experienced an issue)

"Online reviews were important for me to see what others thought having used the e-scooter themselves." (38, e-scooter ownership, not experienced an issue)

"I wasn't looking for the cheapest possible, I wanted a quality brand, but the price ceiling on e-bikes is extremely high so I was also looking for something reasonably priced." (35, e-bike ownership, not experienced an issue)

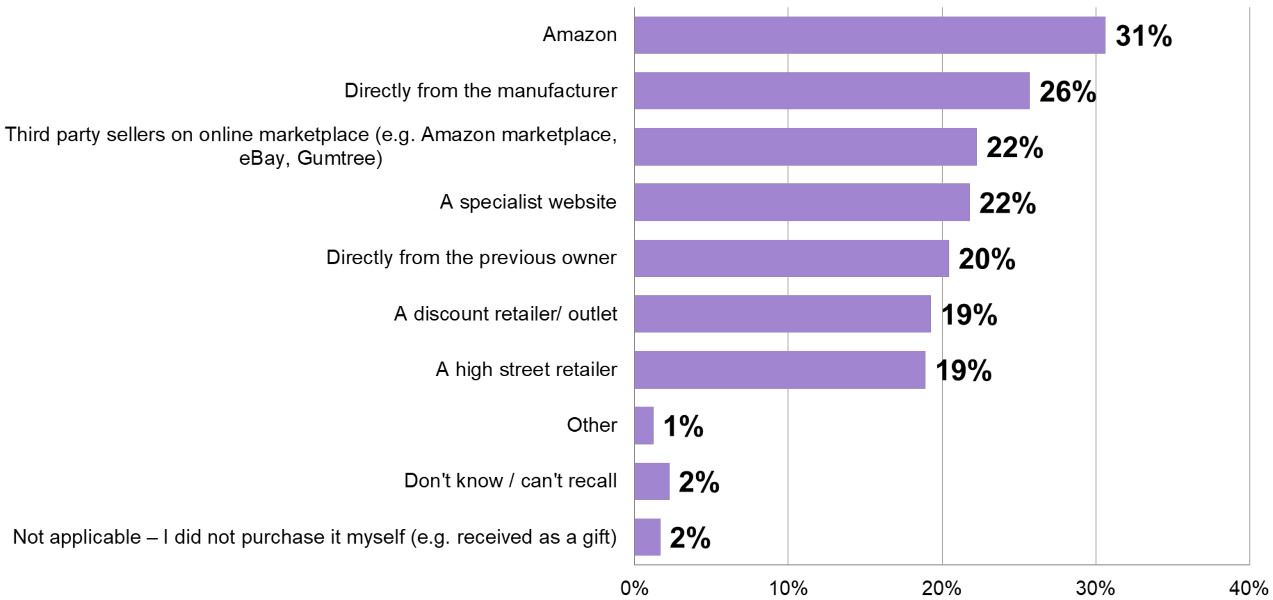
"Price is important because it's a lot of money - wanted to make sure I was getting a good deal, and also not paying for features I wouldn't need. Warranty - because it's so much money. Needed to know I would be covered if I had any issues." (47, e-bike ownership, not experienced an issue)

"Price is always important! I don't have a lot of money to spare! Quality is also important for the same reason - I want to know it is going to last me a while as I don't want to have to replace it quickly." (42, e-bike ownership, not experienced an issue)

"I assumed by choosing Raleigh, I was getting a British standard compliant bike." (46, e-bike ownership, experienced an issue)

"Battery and charger brand, quality, battery capacity, compatibility." (30, e-scooter owner, experienced an issue)

Figure 50. Purchase location of separate battery/ charger for PLEVs



Q. You said you have separately purchased a battery/ charger for a Personal Light Electric Vehicle (PLEV)… From which, if any, of the following places have you purchased batteries/ chargers from?
Base: All who own a PLEV and bought a separate battery/ charger (W6=240)

When purchasing a battery/ charger for their PLEV, the main considerations are consistent with previous waves. Battery life is the most common factor (33% in W5, compared with 36% in W6), followed by the charge speed (24% in W5, compared with 29% in W6), and cost (28% in W5, compared with 27% in W6). Product safety was included as a prompted option in wave six and was chosen as an important factor in their purchase consideration by a quarter of respondents (25%).

The qualitative findings indicated that whilst participants would mainly consider the battery life when purchasing the PLEV, when asked about the priorities when it comes to purchasing a battery separately, most said that they would primarily want to ensure the safety, quality, and compatibility with their PLEV. Price was a lesser concern, as some felt that because they had invested in a bike, they would be willing to pay more for a battery from the original manufacturer to ensure safety and compatibility.

In general, participants said they would assume that the battery or a charger is safe, if they bought it from a reputable brand or a manufacturer, or from a UK regulated company, as well as if it had safety marks on it.

“I'd go back to the original supplier to ensure I was getting the same quality.” (43, e-scooter ownership, not experienced an issue)

“Just knowing it’ll work and would be covered under warranty etc., if you pay so much for the bike not worth risking cheap knock offs!” (41, e-bike ownership, not experienced an issue)

“I would only purchase direct from the manufacturer or local bike/repair shop.” (33, e-bike ownership, not experienced an issue)

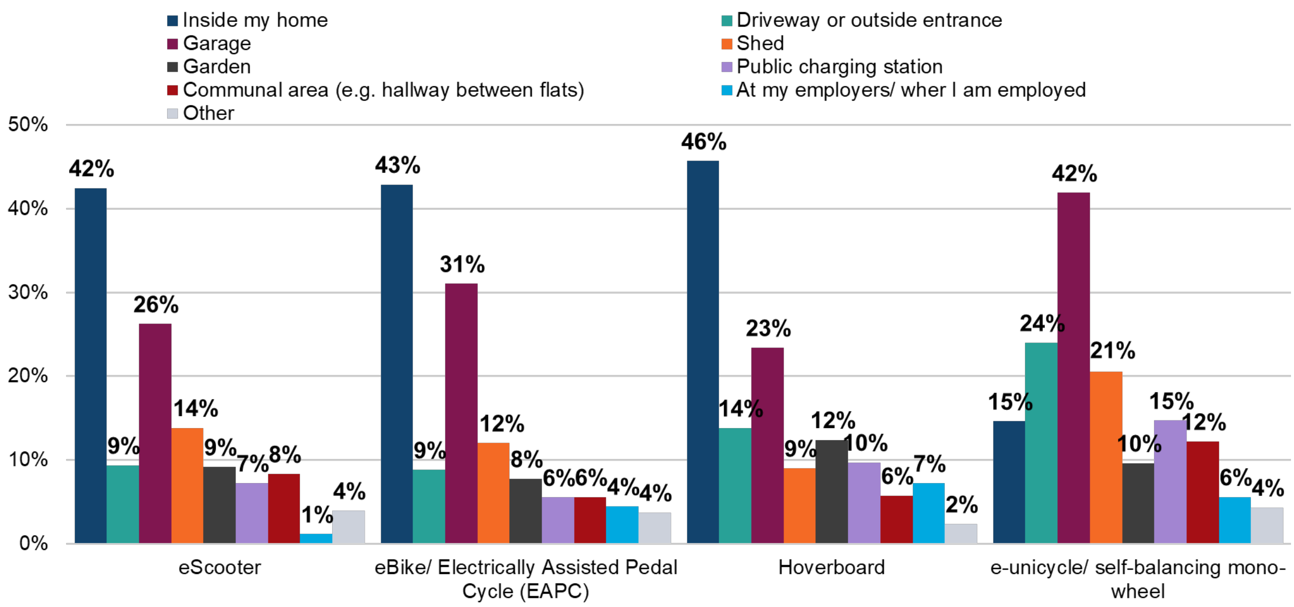
“Safety I take for granted as they have passed tests before sale in this country.” (42, e-bike ownership, not experienced an issue)

“I bought directly from the original supplier of the bike - even though there were cheaper versions online.” (65, e-bike ownership, experienced an issue)

In line with wave five, most charge their PLEV inside their home (figure 50), with the exception of e-unicycles which tend to be charged in a garage (42%). Only a minority of PLEV owners charge their vehicles outside of the home or in a public location

Those without children in the household are more likely than those with children to charge their eBike inside the home (49%, compared to 35% with children).

Figure 51. PLEV charging location

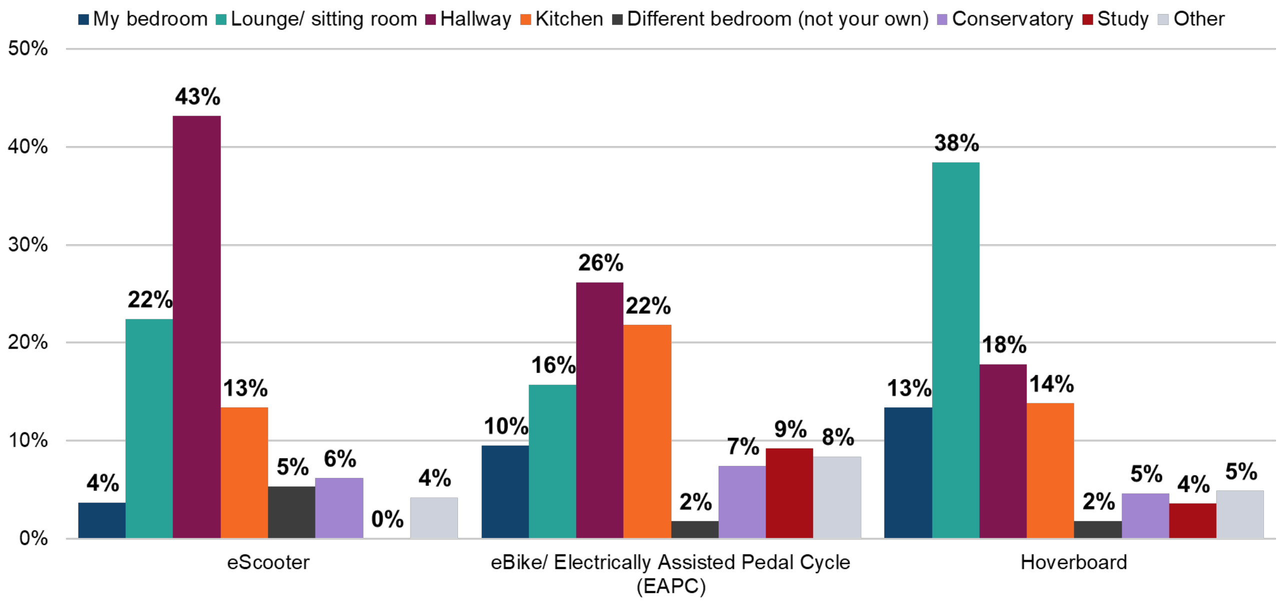


Q: Where do you most frequently charge your Personal Light Electric Vehicle(s) PLEV(s)? Please select all that apply
Base: All who own/ have access to each: (eScooters=192; eBike/ Electrically Assisted Pedal Cycle (EAPC)=315; Hoverboard=144; e-unicycle/ self-balancing mono-wheel=73)

Among those who charge their PLEV at home, in wave six, eScooters tend to be charged in a hallway (43%). Hoverboard owners report charging it in their lounge/ sitting room (38%). eBike owners report charging it in a hallway (26%) or their kitchen (22%).

eScooters are charged most frequently, with a quarter of owners saying they charge their eScooter at least daily (24%), compared to a fifth or less of hoverboard owners (19%), e-unicycle owners (17%), or eBike owners (16%). eBikes are charged much less frequently, with a third of owners reporting they only charge their eBike less than once a fortnight (33%).

Figure 52. PLEV charging location



Q: You previously said you frequently charge your Personal Light Electric Vehicle(s) PLEV(s) inside your home. Please select which room in your home you most frequently charge in.
Base: All who most frequently charge their PLEV at home (eScooters=84; eBike/ Electrically Assisted Pedal Cycle (EAPC)=141; Hoverboard=69; base size too small to show e-unicycle/ self-balancing mono-wheel)

When charging their PLEVs, there has been a rise in owners charging until the battery is full (50% in W5, compared with 59% in W6). This has particularly risen for hoverboard (34% in W5, compared with 54% in W6) and e-unicycle owners (13% in W5, compared with 31% in W6).

Around a fifth usually run the battery to zero, or near zero, before they recharge (19%). Overall, this is broadly consistent with wave five, but has fallen for hoverboard owners specifically (36% in W5, compared with 24% in W6).

The qualitative research found that most participants charged their PLEV inside their home, depending on where they had the space, such as hallway or a bedroom. Some also charged it in their garage or a shed.

When charging their PLEVs, most charge until the battery is full and most do not leave the vehicle unattended or whilst they are asleep due to safety concerns. Others also used smart plugs that would switch off charging after a certain time, to reduce concerns around fire safety. For most participants, the concerns were either because of hearing the media news stories about battery explosions and fires, or because they had experienced a safety issue, which was the case especially among the participants in group 4. Those who did leave their PLEVs to charge unattended, mostly did so because they felt they did not have reasons to be concerned, particularly if they had bought their PLEV from a reputable brand.

"As there are a lot of reports of electric bike fires started at home, I certainly don't trust the battery 100%." (66, e-bike owner, not experienced an issue)

“It crossed my mind since the recent stuff in the news but none of my batteries have never given me cause for concern and I always charge when I’m home anyway.” (48, e-scooter owner, not experienced an issue)

“These scooters/bikes are getting a bad reputation due to horror stories in the news, but it seems that if you're not buying dodgy/cheap no-brand ones, it should be no more risky than a laptop.” (26, e-scooter owner, not experienced an issue)

“Of course it always horrible and concerning to hear news like that, but I supervise charging and have the bike serviced.” (47, e-bike owner, not experienced an issue)

“It hasn't bothered me too much though, having a Bosch battery bought new - I'd say I kept an eye on it a lot for the first couple of weeks but once I realised it was fine, I stopped worrying about it.” (35, e-bike owner, not experienced an issue)

“I used to leave it overnight but not anymore. Usually [I charge it] in the evening so I am able to watch it.” (65, e-bike owner, experienced an issue)

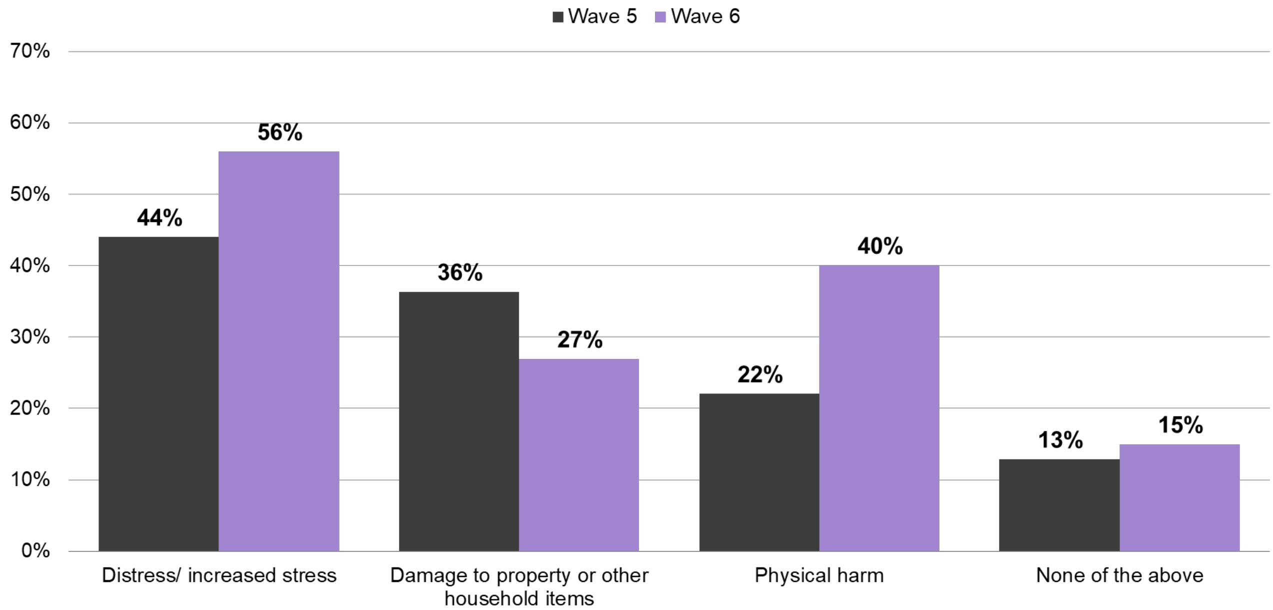
Experience of safety issues with PLEVs

Around a fifth of PLEV owners have experienced a safety issue specifically with the battery/ charger of their vehicle (22% in W5, compared with 21% in W6). This rises to 44% of PLEV owners who have bought a battery/ charger separately, compared to only 5% of PLEV owners who have not done so. However, most of those who experienced a safety issue said it was to do with the original battery/ charger (72%) rather than an additional battery/ charger they had purchased (18%).

Most of those who report experiencing a safety issue with a PLEV say it was electrical in nature (61%), followed by a fire issue such as signs of smoke (44%) or a mechanical issue (37%). Just over one in ten had a chemical safety issue such as irritation or corrosion (12%).

There has been a rise in the proportion who report experiencing physical harm as a result of a safety issue with their PLEV battery/ charger (22% in W5, compared with 40% in W6). The appearance of a rise in distress/ increased stress is not significant.

Figure 53. Outcome of PLEV battery charger safety issue

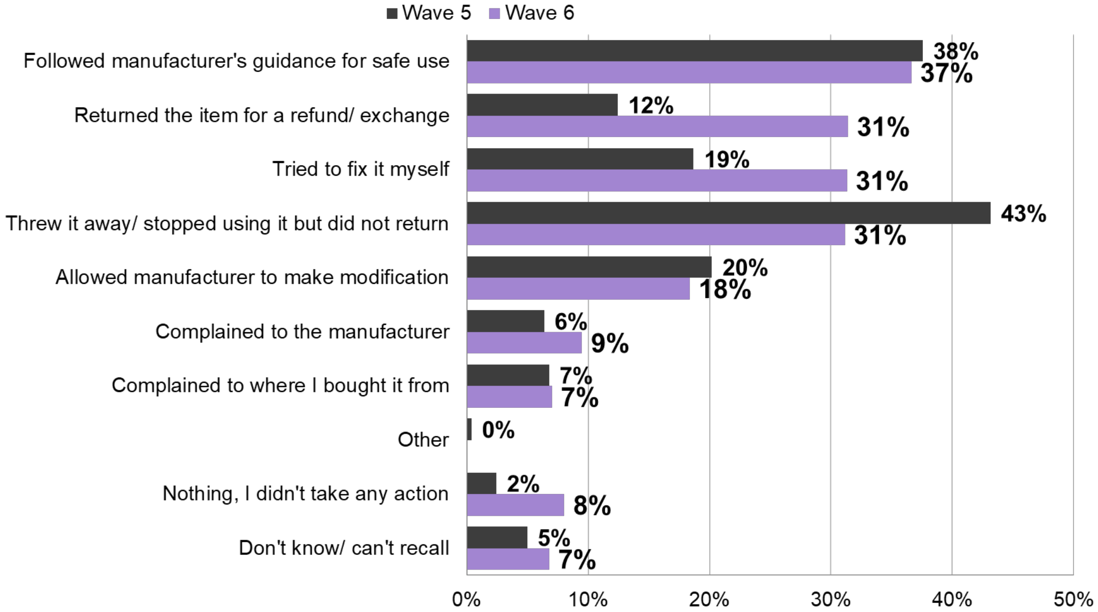


Q. Did that safety issue cause any of the following? (Please select all that apply)
Base: All who had a safety issue with a PLEV (W5=122; W6=117)

The most common action as a result of an issue with a PLEV is now to follow the manufacturer's guidance for safe use (37%) (figure 53). This is a result of a decline in the proportion saying they threw it away/ stopped using it (43% in W5, compared with 31% in W6). There has been a significant rise in the proportion of people who attempt to fix the safety issue themselves (19% in W5, compared with 31% in W6) or return the item for a refund/ exchange (12% in W5, compared with 31% in W6).

In wave six, eBike owners are the most likely to throw the affected item away (43%). eScooter owners are less likely to take any action as a result of a safety issue – nine in ten eBike owners took any action as a result of a safety issue (93%), compared to 78% of eScooter owners.

Figure 54. Action taken as a result of PLEV battery or charger safety issue



Q. Which, if any, of the following did you do as a result of the safety issue? (Please select all that apply)
Base: All who had a safety issue with a PLEV (W5=122; W6=117)

There has been a rise in awareness of help/ advice, such as a support line, from manufacturers of PLEVs – less than half of PLEV owners who had a safety issue were aware of help/ advice from the manufacturer in wave five (46%), rising to six in ten in wave six (61%). eScooter owners who experienced a safety issue were the most likely to be aware of manufacturer support (70%), compared to 59% of eBike owners.

In the qualitative research, participants in group 4 had experienced a safety issue with their PLEV, which included battery explosions or fires; electric shocks whilst charging; a hoverboard suddenly stopping, and a fault with e-bike brakes. All mentioned that they used the original batteries when the issues happened.

“I got an electric shock while charging it when the battery went down completely.” (20, e-scooter owner, experienced an issue)

“Battery died mid spin and flung my daughter off requiring hospital treatment.” (48, hoverboard owner, experienced an issue)

“I had a battery explode whilst charging in my caravan awning - it caused a fire and wrote off our caravan and awning.” (46, e-bike owner, experienced an issue)

Most took an action after experiencing the issue, some reported it to the manufacturer, and others went to a specialist to fix the issue. In most cases, the issues were either fixed, or they obtained a refund from the manufacturer. After experiencing the issue, most either took additional precautions when charging their PLEV, or some had stopped using the product completely.

“Contacted the manufacturer and they supplied a replacement.” (65, e-bike owner, experienced an issue)

“The hoverboard worked fine afterwards but [her daughter] hasn’t really used it since.” (48, hoverboard owner, experienced an issue)

“I try to keep an eye on it while charging.” (30, e-scooter owner, experienced an issue)

None of the participants had reported the issue to a government organisation or trading standards, either because they did not realise that they had the option to, or because it was resolved through a manufacturer. A participant who had experienced a battery fire said that they assumed that it would be reported by the fire brigade. When asked whether they would know how to report it to the trading standards, most said that they would search how to do it online.

In groups 1, 2 and 3, most participants had not experienced safety issues with their PLEV. When asked if they would report an issue if they were to experience it, most said that they would report it either to the manufacturer or supplier. Many felt that if the issue was serious, they would want to make sure that the manufacturer is notified, as they would expect them to take an action. When prompted on whether they would report it to the trading standards, most said they would only consider it if the issue was serious, or if the manufacturer was not taking any action. Many were not sure about what action the local authority could take, some felt that they would be more likely to only record it, and a few did not trust that they could resolve the issue.

“Probably ought to report it but I’d also expect the seller to report it to the manufacturer.” (38, e-scooter owner, not experienced an issue)

“Unless it was serious, I wouldn't bother [reporting to the Trading Standards] because I doubt they'd do anything.” (44, e-bike owner, not experienced an issue)

“My reason for reporting [to the Trading Standards] would be if I thought the company had been negligent and I was dissatisfied with their resolution of the issue.” (36, e-scooter owner, not experienced an issue)

Legal Metrology/ weights and measures

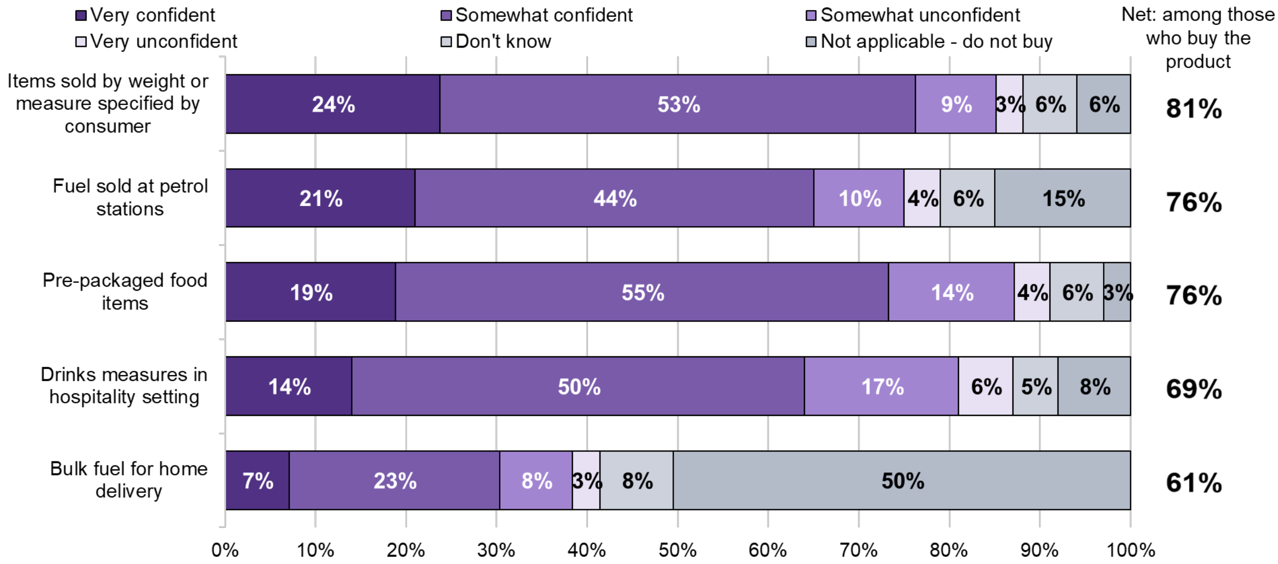
In wave six, questions on legal metrology / weights and measures were shown to approximately a third of all respondents, allocated randomly (n=3,371). Exact base sizes for specific questions are shown below each chart.

A majority of those who buy the products listed report that they are confident that they are receiving the correct measure of the product. The products which inspire the most confidence (81% among customers) are items sold by weight or measure specified by the consumer (e.g. food at a deli). This is followed by fuel sold at petrol stations and pre-packaged food items (both 76%). After this is drinks measures (69%) and bulk fuel for home delivery (61%).

Younger respondents, aged 18-29, report lower levels of confidence across all the measures. The largest disparity between the confidence levels for this age groups compared to other age groups is in drinks measures in a hospitality setting. Out of those who bought that kind of product 58% of 18-29 year olds report trusting the measurements. This is compared to 68% of 30-49 year olds, 72% of 50-64 year olds and 76% among those aged 65+.

Respondents from an ethnic minority background were also less likely than white respondents to report confidence in the measures they receive, across all the products. The greatest disparity in confidence was for measures of bulk fuel (53%, compared with 62% of white respondents), followed by confidence in items sold by weight (74%, compared with 82% of white respondents).

Figure 55. Confidence in measures purchased by product

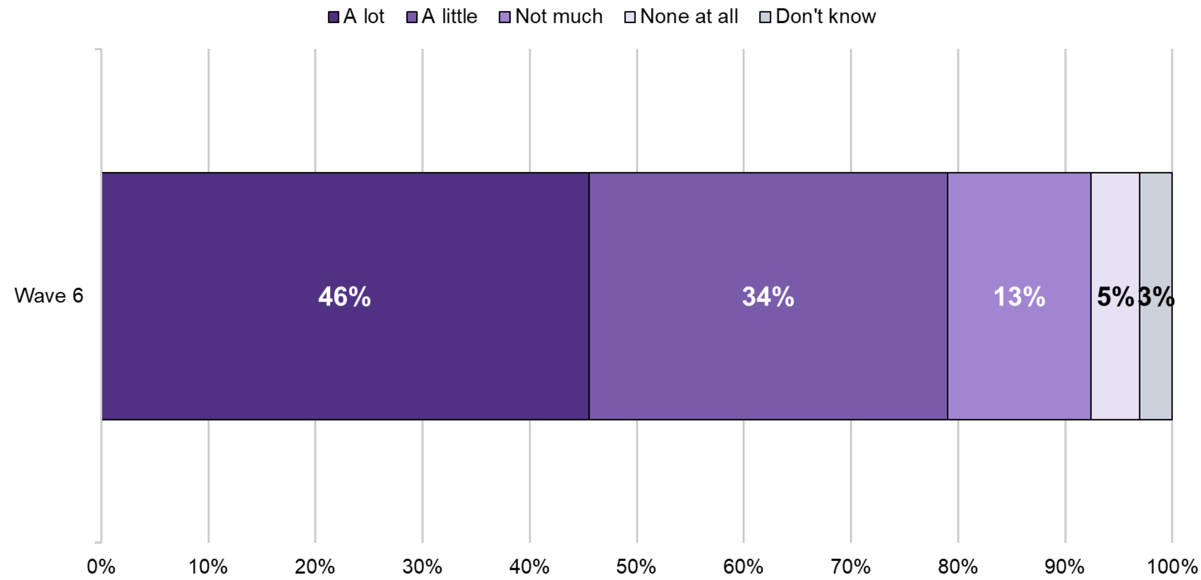


Q: Thinking about the products you buy, how confident, if at all, are you that you receive the accurate measures for each product? (For example, if you pay for 1kg of product, are you confident that you will receive 1kg?)
Base: All in Metrology/ weights section (W6=3,371)

A majority of the UK public (79%) pay at least a little attention to the price to weight indication marking on products, while 3% pay not much attention, and only 5% reporting that they pay none at all. Older respondents report being more likely to pay a lot of attention to price indications, compared to younger respondents (52% of those aged 65+, 48% of those aged 50-64, 42% of those aged 30-49, 41% of those aged 18-29). Those aged 18-29 were the age group most likely to report that they don't know (6%, compared with 4% of those aged 30-49, 2% of those aged 50-64, 0% of those aged 65+).

Those coping on their present income are more likely to report that they pay at least a little attention to price indication marking on products (82%, compared with 76% of those finding it difficult), while those who are finding it difficult are more likely to report that they do not know (4%, vs 1% of those coping).

Figure 56. Attention paid to price indication marking on products

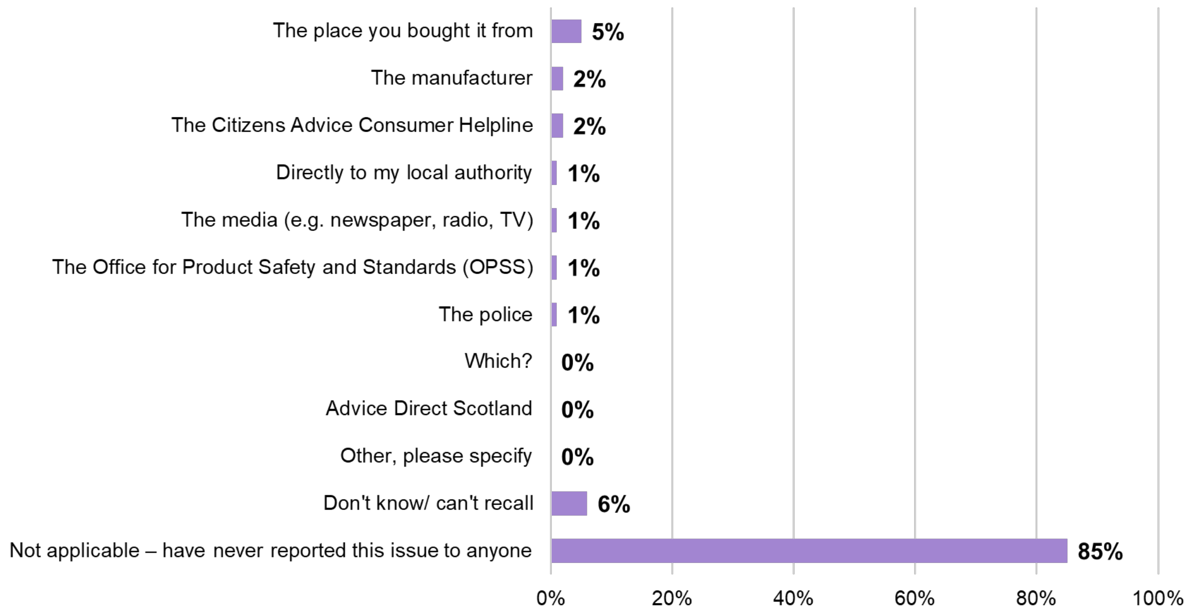


Q: How much attention, if any, do you pay to the price indication marking on products? (For example, on price labels including information such as: 2.10p per 10kg)
Base: All in Metrology/ weights section (W6=3,371)

A majority (85%) have never reported an issue with a product being the wrong weight. Out of those who have, the place purchased from is the top place to report to (5%), followed by the manufacturer (2%) and then the Citizens Advice Consumer Helpline (2%). Only 1% reported to the OPSS.

Men were more likely than women to have reported to any of the organisations (11%, compared with 7% of women). Young people are also more likely to have reported to any organisation, compared to all other age groups (13% of those aged 18-29, 9% of those aged 30-49, 7% of those aged 50-64, 7% of those aged 65+).

Figure 57. Reported a product for being the incorrect measurement

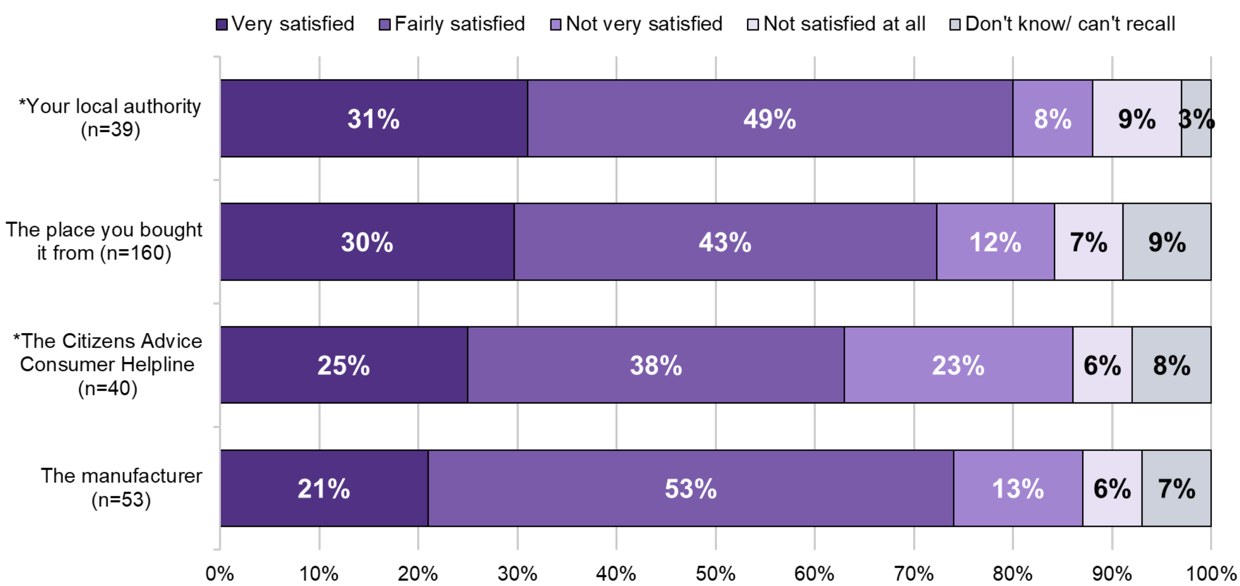


Q: Have you ever reported a product for being the incorrect measurement (e.g. underweight, too large) to any of the following organisations? (Please select all that apply)
Base: All in Metrology/ weights section (W6=3,371)

Out of those who reported an incorrect weight of a product purchased to the place where they bought it from, a majority (73%) report being at least fairly satisfied with the response, although just under a fifth (18%) did report being unsatisfied with the reaction.

Looking at the satisfaction levels of those who reported an incorrect weight to the manufacturer of the product, a similar level as those who reported to the place purchased, report being satisfied (73%), as well as a similar level reporting being unsatisfied (19%).

Figure 58. Satisfaction with reporting an incorrect measurement



Q: You said you reported a product being the incorrect measurement to the following people. Thinking about the most recent occasion...How satisfied, if at all, with their response or the actions they took?
Base: All who complained/ reported to a valid organisation: The place you bought it from (n=160), The manufacturer (n=53), The Citizens Advice Consumer Helpline (n=40), Your local authority (n=39)

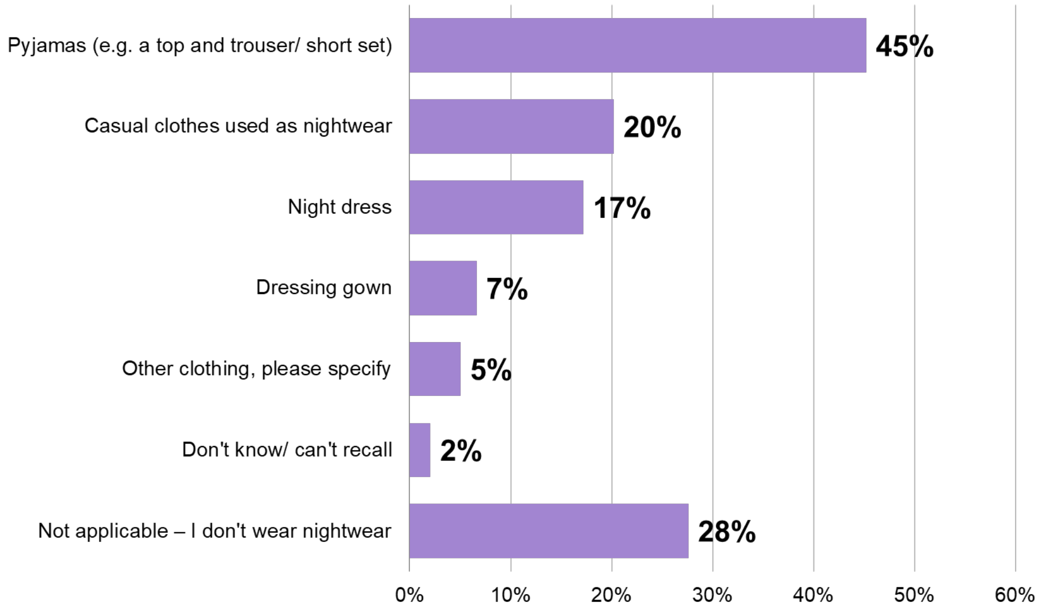
Out of those who reported a product being the incorrect measurement, 66% report that it is no longer an issue, while 27% find that is it still an issue. Out of those for whom it is still an issue, 17% have given up trying to resolve it, while 10% are still actively pursuing a resolution to the issue.

Nightwear

In wave six, questions on nightwear were shown to approximately a third of all respondents, allocated randomly (n=3,438). Exact base sizes for specific questions are shown below each chart.

Respondents were first asked which types of clothing, if any, they regularly use as nightwear. Seven in ten (70%) report using some form of nightwear, with the most popular being pyjamas (e.g. a top and trouser/ short set); nearly half (45%) respondents report wearing these. This is followed by casual clothes used as nightwear (20%), a night dress (17%), a dressing gown (7%) and some other form of clothing (5%). Nearly three in ten (28%) report that they do not wear nightwear.

Figure 59. Types of nightwear worn regularly



Q: Which, if any, of the following do you regularly use as nightwear (i.e. to sleep in)? Please select all that apply.
Base: All in nightwear section (W6=3,438)

A number of large differences in nightwear preferences are observable across demographic groups. Women are more likely than men to report wearing pyjamas (56%,compared with 33% of men), a night dress (30%, compared with 3% of men), or a dressing gown (9%, compared with 4% of men). However, these differences may be driven by men being much more likely to say that they don’t wear any nightwear (42%, compared with 15% of women).

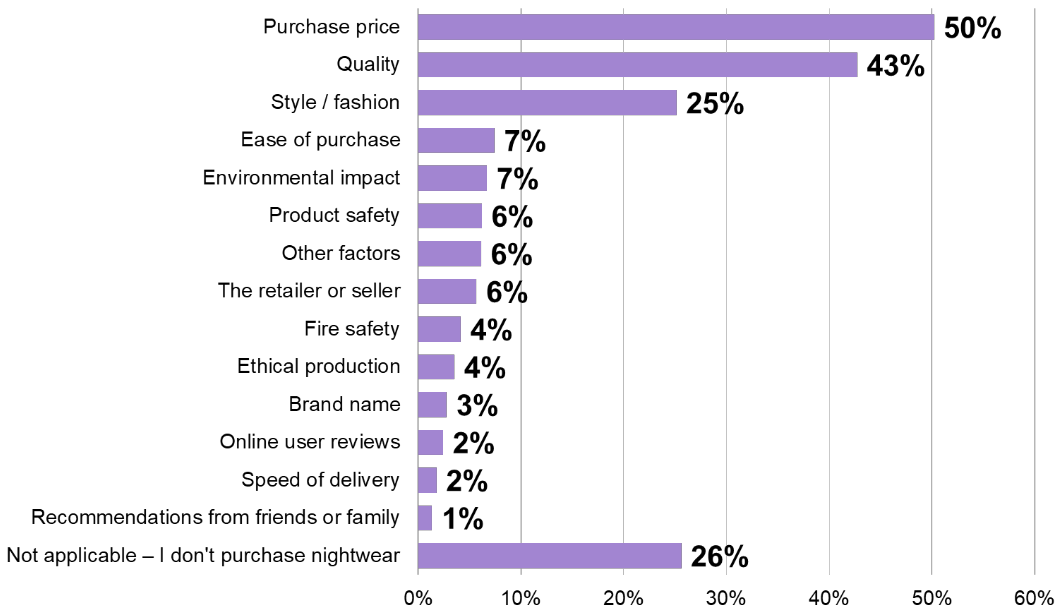
Younger adults are more likely to wear pyjamas than older respondents (48% of those aged 18 to 29, 50% of those aged 30 to 49, 39% of those aged 50 to 64, 41% of those aged 65+). There is also a downward trend by age for wearing casual clothes as nightwear (35% of those aged 18 to 29, 22% of those aged 30 to 49, 16% of those aged 50 to 64, 10% of those aged 65+). In contrast, 29% of those aged 65 and over report wearing a night dress, compared with just 10% of those aged under 30. Overall, propensity to wear nightwear follows an N-shaped pattern, with those in the middle age groups (28% of those aged 30 to 49, 34% of those aged 50 to 64) more likely than the youngest or oldest to say that they do not wear any nightwear (23% of those aged 18 to 29, 24% of those aged 65+).

Those in the offline survey were the most likely to wear nightwear overall, at 90%. This is 20 points higher than the online sample overall, and 15 points higher than those aged 65+ within the online sample. The types of nightwear worn by those in the offline sample mirror those in the online sample.[3]

The results of the quantitative survey were mirrored by participants in the qualitative research, who said they wore a variety of nightwear, from pyjamas (including shorts and trousers) to onesies, to old shirts to night dresses to underwear. Focus group participants report that the choice of nightwear often depends on the weather.

Participants visit supermarkets as well as specific shops to purchase nightwear, while others purchase online. The most important factors to adults when purchasing nightwear (either for themselves or for someone in their household), are price (50%) and quality (43%). One in four (25%) mention style/ fashion, while all other factors listed are considered important by less than one in ten adults.

Figure 60. Factors when purchasing nightwear



Q: Which, if any, of the following factors are most important to you when purchasing items sold as nightwear, either for yourself or someone in your household? (Please select up to three)
Base: All in nightwear section (W6=3,438)

[3] The offline sample for this section is based on a small sample size of n=42 so should be treated with caution.

Price is consistently the most important factor across all demographic groups, though some are more likely to mention this than others. Six in ten (59%) women report this being important, compared with 40% of men. However, this is partly driven by men being more likely to say they do not purchase nightwear for anyone (40%) and thus not selecting any factors as important in purchase decisions. For older adults, price is tied with quality as the most important factor (both 47%), while for younger respondents price is more important (53%, 45% quality).

As with price, women are more likely than men to mention quality as an important factor (51%, compared with 34% of men). There is a negative age gradient in the importance of style/ fashion, with younger adults more likely to prioritise this (28% of those aged 18 to 29, compared with 20% of those aged 65+).

Factors relating to safety are much less likely to be considered important when it comes to people's nightwear purchasing habits. Product safety is only chosen by 6% of adults, while 4% chose fire safety.

Older respondents are substantially more likely to prioritise product safety (3% of those aged 18 to 29, compared with 11% of those aged 65+). They are also more likely to cite fire safety specifically as an important factor in their nightwear purchases (1% of those aged 18 to 29, compared with 9% of those aged 65+)

Nearly half of the offline adults (45%) mention fire safety as a factor when purchasing nightwear. Although this is based on a small sample size (n=42), this is far higher than online adults (4%), including those aged 65+ (9%).

Unlike the quantitative research, where price was by far the most cited factor, comfort and warmth tended to be the most important factors to consumers when purchasing nightwear in the qualitative research. Other factors include material, pattern, and quality. Quality is determined by the brand or feeling the material, some also look to reviews to ensure that the product is of good quality. Material is also important, many look for natural materials such as cotton or silk, these are felt to be 'breathable' and comfortable unlike other synthetics.

"Comfort is key. I want to feel relaxed and cozy when I slip into my pyjamas, so soft and breathable fabrics are a must". (Male, 29)

"Comfort, breathable fabric, loose fitting, nice quality." (Female, 50)

"It needs to be 100% cotton for me due to sensitive skin, and good quality and nice colour." (Male, 36)

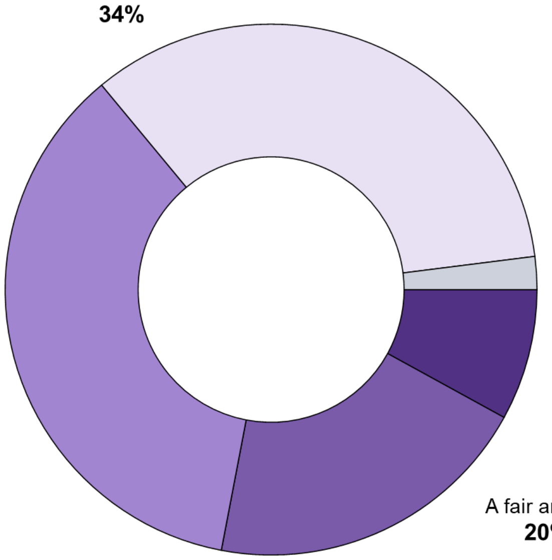
"Thickness of fabric and reviews. Also knowing [name of retailer] was good quality previous I buy from the same place each time" (Male, 36)

"Not to cause itching, allergies and static… Must be natural… cotton, silk" (Female, 58)

Nightwear and fire safety

Just under three in ten of those who purchase nightwear (28%) say they pay a lot/ a fair amount of attention to the fire safety labels attached to nightwear. More than a third (36%) say they pay "not much" attention, while 34% pay no attention at all. Overall, this means that 64% report paying any attention to this type of labelling on nightwear.

Figure 61. Attention paid to fire safety labelling on nightwear



Q: How much attention, if any, do you pay to fire safety information on labels attached to nightwear clothing you purchase?
Base: All who purchase nightwear (W6=2,583)

Older respondents are substantially more likely to report paying a lot/ fair amount of attention to this type of labelling, with 46% of those aged 65 and over saying this compared with 16% of those aged under 30.

Those without children in the household are more likely to pay attention to safety information on nightwear – 30% of those without children, compared with 25% with children in the household. Of those with children in the household, attention is highest for those with older children; 23% of those with children up to five pay attention to nightwear safety labels, compared with 37% of those with children over 18.

Those with a disability are more likely to pay attention to safety information on nightwear they purchase (37%, compared with 24% without).

Similarly, those with a low/ medium level of education are more likely than those with a high level of education to pay attention to safety information on nightwear (31% low, 29% medium, 24% high).

More than six in ten (63%) of offline adults report paying a lot/ a fair amount of attention to fire safety labelling on nightwear, significantly higher than online adults.

Most participants in the qualitative research had not considered the safety of their nightwear but assumed that they would not be flammable, although many do not check for fire safe labels (as these are often cut off when items are purchased).

Participants were not aware that nightwear can have chemical flame retardants to meet Nightwear (Safety) Regulations (1985), some were concerned that this would make products uncomfortable, or make their skin irritated or would increase the price of the item. Finally, most were concerned with the safety of children rather than themselves, as children may have less awareness or experience with potential dangers.

"I would imagine not as comfortable, but the price would reflect that at a guess." (Male, 33)

“I would hope clothing isn’t made out of materials that are particularly flammable.” (Female, 33)

“That’s tricky, weighing up lower flammability against exposure to chemicals for children” (Female, 50)

[Concern on flame retardants] “Effect they had on the skin. Effect they have on durability of fabric” (Female, 65)

Nightwear and fire safety: Nightwear (Safety) Regulations 1985

The Nightwear (Safety) Regulations 1985 (the ‘1985 Regulation’) make it an offence to supply some children's nightwear unless it has been treated so that it conforms to fire safety requirements. A third (35%) said that, before taking the survey, they were aware of these regulations, while 65% were unaware.

Those with no children in the household are more familiar with the 1985 Regulations compared to those with children in the household (38%, compared with 31% with children). In line with their higher likelihood to pay attention to safety labels, there is an upward trend by age of children for awareness of the Nightwear (Safety) Regulations (1985), (23% with children up to five, 29% with children 6 to 10, 36% with children 11 to 15, 48% with children 16 to 18, 53% with children over 18).

Consistent with their higher likelihood to purchase nightwear, women tend to be more aware than men of the 1985 Regulations (41%, compared with 29% of men). Similarly, older adults are more likely to pay attention to safety labels on nightwear they buy and, perhaps due to this, are more likely than younger adults to be familiar with the 1985 Regulations (15% of those aged 18 to 29, compared with 56% of those aged 65+)

Just as they are more likely to pay attention to safety labels, those with a disability are more likely to be aware of the Nightwear (Safety) Regulations (1985), than those without a disability (43%, compared with 32% without a disability).

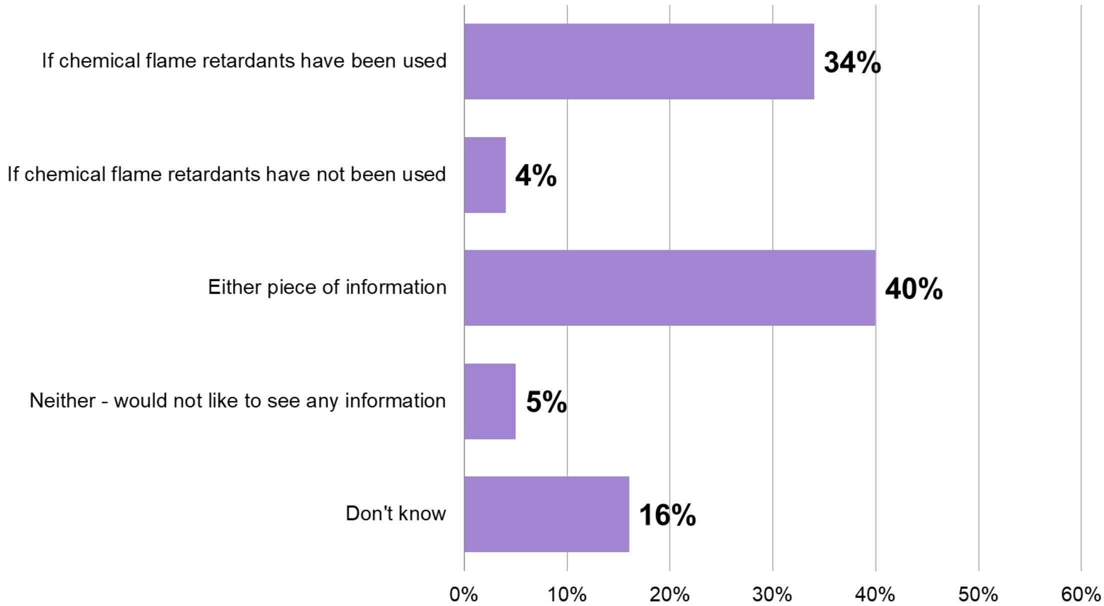
Nightwear and fire safety: Chemical Flame Retardants

Respondents are split when it comes to whether the material nightwear is made of and/or chemical flame retardants (CFRs) in the clothing ensure that nightwear meets fire safety requirements. Just over half (54%) say that chemical flame retardants do so, while a similar figure (49%) say the same about the material it is made from. One in four (26%) do not know what ensures nightwear meets regulatory standards for fire safety.

There is again a clear age divide in perceptions here, with older people more likely than younger people to believe that chemical flame retardants ensure fire safety requirements are met (53% of those aged 18 to 29, compared with 60% of those aged 65+). In contrast, younger people are more likely to believe that the material nightwear is made from plays a role (59% of those aged 18 to 29, compared with 43% of those aged 65+).

Those with a disability are less likely than those without to say the material ensures nightwear meets fire safety requirements (44%, compared with 51% without). However, there is no difference in terms of whether CFRs are involved (55%, compared with 54% without).

Figure 62. What ensures nightwear meets fire safety requirements



Q: Which, if either, of the following do you think ensures nightwear meets fire safety requirements?
Base: All in nightwear section (W6=3,438)

Awareness that nightwear can contain chemical flame retardants is at a similar level to awareness of the 1985 Regulations overall. Over a third (37%) say they were aware of this before taking the survey, while 63% were unaware.

Consistent with findings elsewhere in this chapter, awareness of chemical flame retardants (CFRs) is higher amongst women (39%, compared with 35% of men) and older people (21%, compared with 54% of those of those aged 65+).

Those from a white background are nearly twice as likely to say they have heard of CFRs than those from an ethnic minority background (39%, compared with 21% of those from an ethnic minority background)

Those with a disability are also more likely to say they are aware of CFRs (45%, compared with 33% of those without).

Respondents who had heard of chemical flame retardants (CFRs) in nightwear were then asked whether they had ever specifically looked for clothing that did not contain CFRs. Overall, one in seven (14%) report having done so, with 7% saying they looked specifically for pyjamas without CFRs, 6% for dressing gowns, and 4% for night dresses or casual clothes used as nightwear. Filtering these results to remove those who say they don’t purchase nightwear has little effect, with the proportion saying they have looked for clothing without CFRs only rising marginally to 17%.

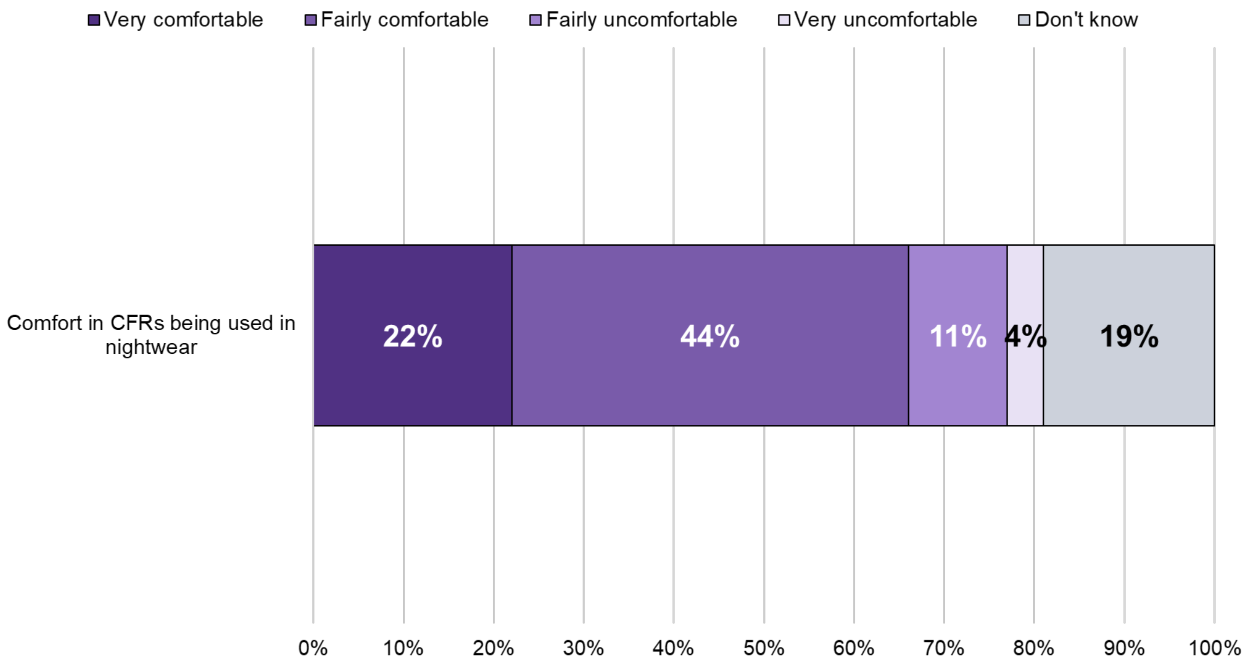
Among those aware that nightwear may contain chemical flame retardants, younger people are much more likely than older people to report specifically looking for clothing that did not contain them (27% of those aged 18 to 29, compared with 10% of those aged 65+). This is in line with the finding that older people are more likely to believe that CFRs play a role in nightwear meeting fire safety requirements, whereas younger people are more likely to think that the material it is made from plays a role.

A quarter of those with children in their household have looked for nightwear without chemical flame retardants (24%, compared with 11% of those without children). This is highest for those with young children in their household – 31% of those with a child under five have done so, compared with 11% of those with a child over 18.

Over two-fifths of adults from an ethnic minority background have specifically looked for nightwear without CFRs (44%, compared with 12% of white respondents)

Overall, those who had been aware of the use of chemical flame retardants in nightwear generally feel comfortable with their use. Two-thirds (66%) report being either very or fairly comfortable, while just 15% are very/ fairly uncomfortable. One in five (19%) are unsure.

Figure 63. Comfort in chemical flame retardants being used in nightwear



Q: How comfortable or uncomfortable do you feel about chemical flame retardants being used in nightwear?
Base: All aware of CFRs in nightwear (W6=1,283)

Men aware of chemical flame retardants are more likely than women to be comfortable with the use of them in nightwear (75%, compared with 59% of women). Women aware of CFRs are more likely to be uncomfortable (18%, compared with 11% of men) or unsure (22%, compared with 14% of men). Unlike the previous questions on nightwear and fire safety, there is little in terms of consistent trend by age here.

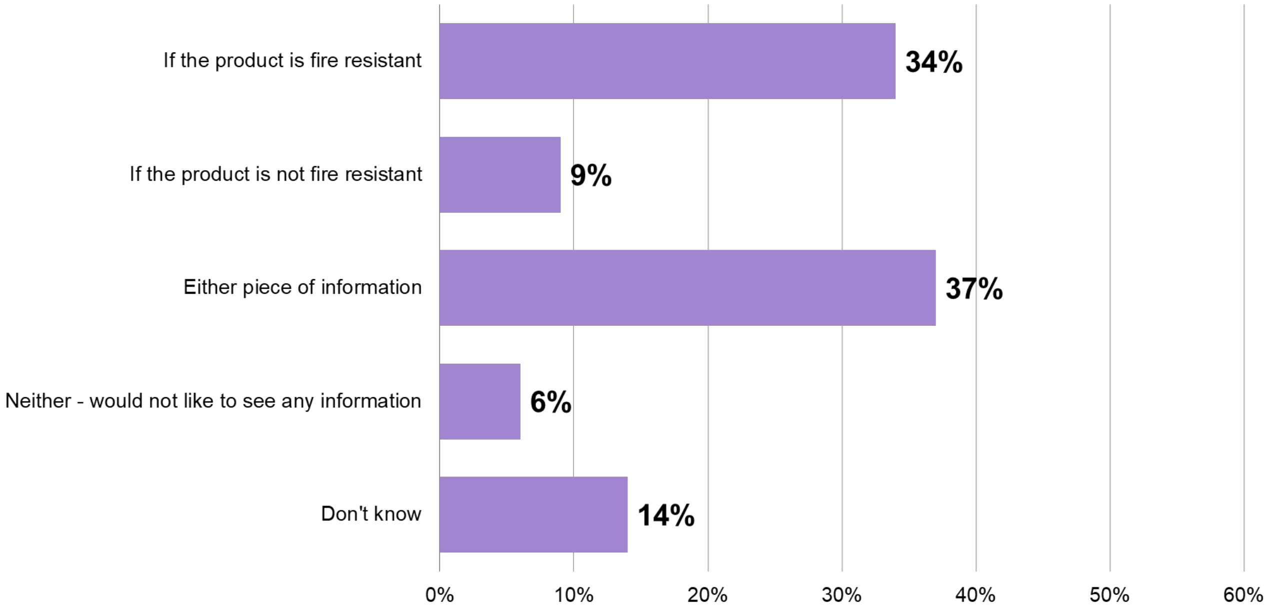
Those from an ethnic minority background are twice as likely as those from a white background to report being uncomfortable about the use of CFRs in nightwear (24%, compared with 12% of white respondents).

Comfort with chemical flame retardants does not seem to be related to people looking for nightwear without them. A fifth of those uncomfortable with CFRs have shopped for nightwear without them (20%), compared to 16% of those comfortable with CFRs – an insignificant difference.

Nightwear and fire safety: information

People are split when thinking about what pieces of information relating to fire resistance they would like to see on nightwear. Over a third (37%) report that they would like to know if either the product is fire resistant or is not fire resistant, while a similar proportion (34%) would want to know if the product is fire resistant only. Just one in ten (9%) would want to see if the product is not fire resistant. 6% do not want to see any information relating to fire resistance, while 14% are unsure.

Figure 64. Fire safety information relating to fire resistance you would like to see on nightwear

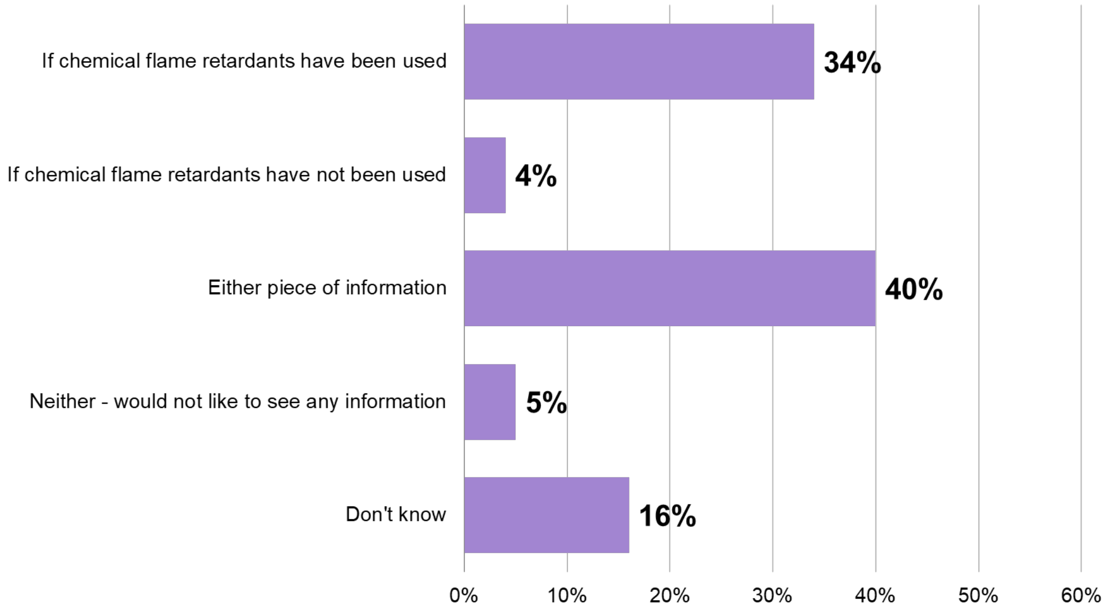


Q: When thinking about fire safety information on nightwear, which of the following pieces of information relating to fire resistance would you like to see?
Base: All in nightwear section (W6=3,438)

Women are more likely than men to say they would like to see either piece of information relating to fire resistance (41%, compared with 33% of men), while men are more likely to say they would want to know if the product is fire resistant (32%, compared with 36% of men) or not to want to see any information about fire resistance (4%, compared with 7% of men).

The same question was asked about information relating to chemical flame retardants used in nightwear, with largely similar results to those for fire resistance. One in three (34%) report wanting to know if chemical flame retardants have been used, four in ten (40%) would like to know whether they have or have not been used, while just 4% would only want to know if they have not been used. A minority (5%) would not like to see any information, while one in six (16%) are unsure.

Figure 6565. Fire safety information relating to chemical flame retardants you would like to see on nightwear



Q: When thinking about fire safety information on nightwear, which of the following pieces of information relating to chemical flame retardants would you like to see?
Base: All in nightwear section (W6=3,438)

As with fire resistance, women are more likely to report wanting to see either piece of information (44%, compared with 35% of men), while men are more likely to not want to see any information (4%, compared with 7% of men). Older adults' elevated levels of favourability towards chemical flame retardants are seen here, with 46% of those aged 65 and over wanting to see either of these pieces of information, compared with 37% of those aged under 30.

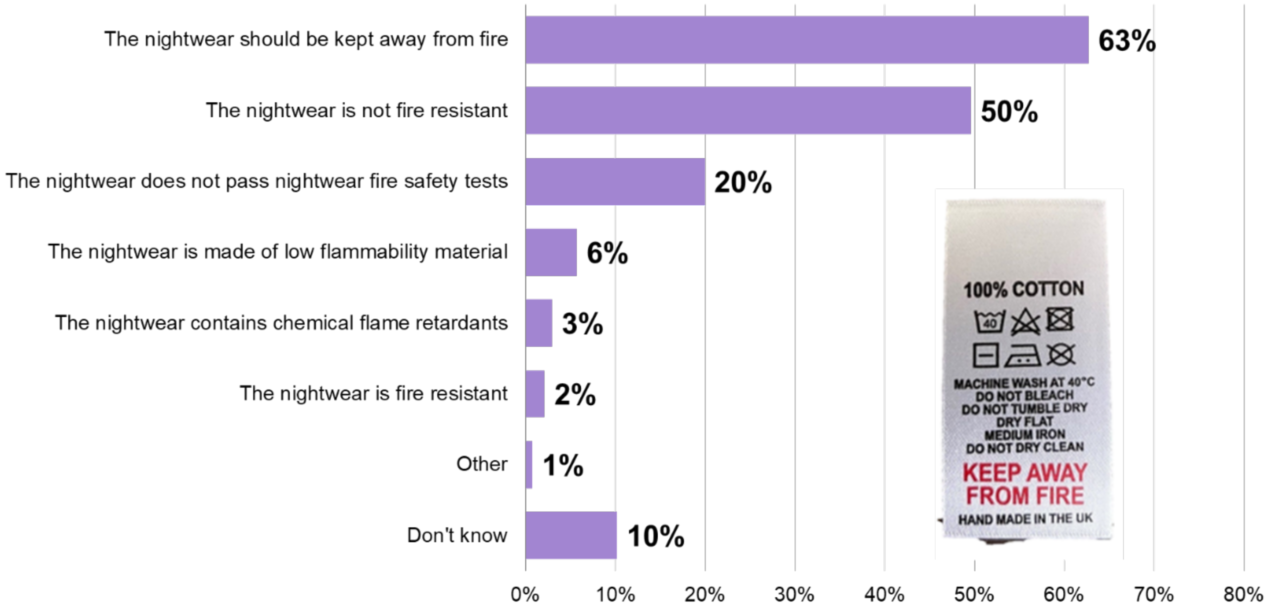
Those of low educational attainment (19%) are more likely to say they do not know what information about CFRs they want to see, compared to 15% of those with medium education and 14% with high education.

Respondents were then shown two separate labels that may be attached to pieces of nightwear (as illustrated in the charts below) and asked what they thought each meant.

The most commonly mentioned response for the first label, which contains a large "keep away from fire" warning, was that the clothing should be kept away from fire (63%).

Half (50%) stated that they believed the label indicated the clothing is *not* fire resistant, with only 2% stating that it meant it is fire resistant, meaning that overall knowledge is good among respondents here. Women are slightly more likely to identify the label as meaning clothing as not fire resistant (52%, compared with 47% of men). However, one in five (20%) thought that this label means that the nightwear does not pass fire safety tests, a belief that is higher among older adults (16% of those aged 18 to 29, compared with 28% of those aged 65+).

Figure 66. Meaning of "keep away from fire" safety label

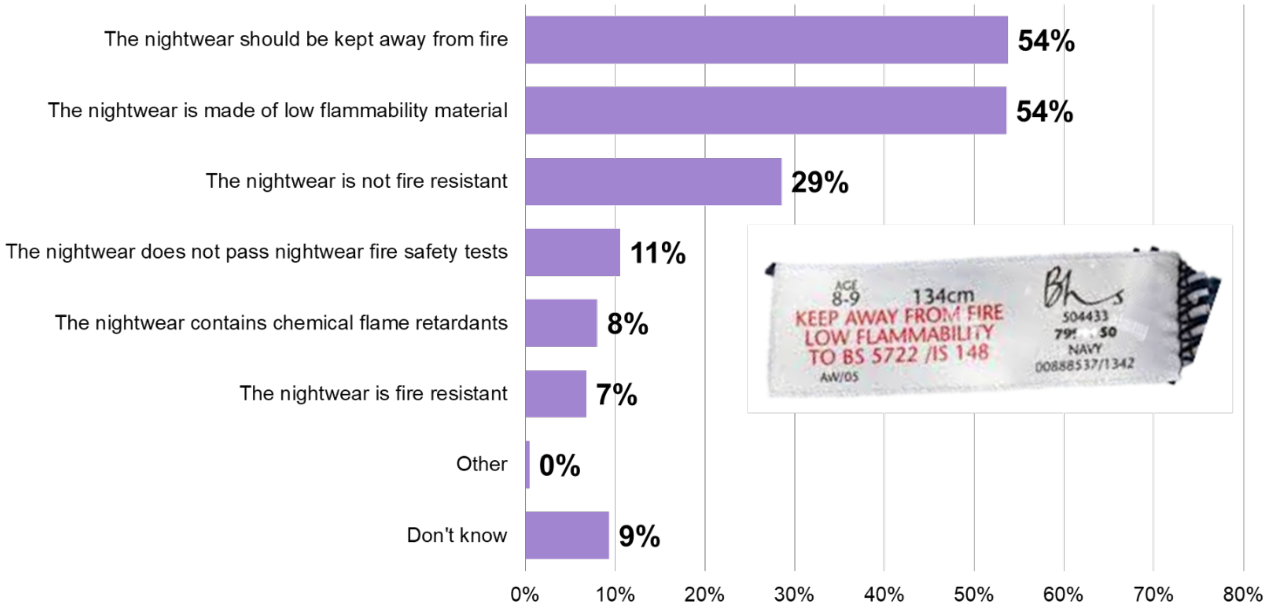


Q: Please imagine you saw the below label on an item of nightwear. Which, if any, of the following describe what you think following label means? (Please select all that apply)
Base: All in nightwear section (W6=3,438)

For the second label, which has an additional "low flammability warning", over half think that the nightwear should be kept away from fire and that the nightwear is made of low flammability material (both 54%). People are less likely than the first label to believe that this label indicates the nightwear is not fire resistant (29%), and more likely to say that it is fire resistant (7%).

Women are more likely than men to associate each of these common meanings with the label; 57% believe the nightwear is made of low flammability materials (50% men), 30% believe the nightwear is not fire resistant (compared with 27% of men). However, men are more likely than women to believe the label means the nightwear is fire resistant (8%, compared with 6% of women).

Figure 67. Meaning of “low flammability” safety label



Q: Please imagine you saw the below label on an item of nightwear. Which, if any, of the following describe what you think following label means? (Please select all that apply)
Base: All in nightwear section (W6=3,438)

Fire safety incidents

Respondents were asked if they or someone in their household has ever had an incident where clothing they were wearing caught fire or nearly caught fire; the majority say this has not happened (86%), but 6% have experienced a fire safety incident with clothing.

A quarter of those who have ever looked for clothing without chemical flame retardants say they or a member of their household has experienced a clothing-related fire safety incident (27%).

Those with children in their household are more likely to report an incident than those without children – 8% of those with children say they or someone in their household has had clothing catch/ nearly catch fire, compared with 5% of those without children.

Those from an ethnic minority background are more likely than white adults to report a clothing-related fire safety incident (10%, compared with 5% of white adults).

Those with a disability are also more likely to report this than those without a disability (10%, compared with 4% without).

Those who had experienced an incident of clothing catching on fire in their household were asked what the source of the fire was (in the most serious instance). The most common response is an open flame (e.g. candle, bonfire, gas hob), mentioned by half of those who experienced an incident (50%). This is followed by cigarettes/ smoking materials (23%) and kitchen appliances (e.g. toaster, oven) (16%).

People who have a child in the household and experienced a fire safety incident are more likely than those without children to say the source was an electronic device such as a smartphone (18%, compared with 4% without children) or an electrical outlet (19%, compared with 5% without children).

The most common form of nightwear that people have experienced catching/ nearly catching fire is a dressing gown (25%), followed by a night dress (21%) and casual clothes used as nightwear (18%). Overall, though, the most common response here was other forms of clothing – three in ten people who experienced a fire safety incident said it was with clothing that was not nightwear (30%).

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