

## CONCERNED CONSUMERS SUMMARY – FEBRUARY 2010

Populus interviewed 1,011 adults aged 18+ online between 26<sup>th</sup> February and 1<sup>st</sup> March 2010. The results have been weighted to be representative of all adults. Populus is a member of the British Polling Council and abides by its rules. For more details go to [www.populus.co.uk](http://www.populus.co.uk).

(Concerned Consumers n=481)

## CONCERNED CONSUMERS' THERMOMETER

Please rate the following companies on the basis of your overall impressions of their general behaviour. 100 means you would go out of your way to buy their products or services and advise others such as friends and family to do the same and 1 means you would avoid buying their products and services and advise others such as friends and family to do the same. 50 means you have no particular feelings either way. You can use any number from 1 to 100, the higher the number the more favourable your overall impressions are. [CONCERNED CONSUMERS ONLY]

	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Nov-09	Feb-10	<i>Change since last survey</i>	<i>Change since last year</i>
<b>Google</b>	67	66	72	71	72	70	72	68	2	+1
<b>Marks &amp; Spencer</b>	60	60	64	63	65	64	65	65	1	+5
<b>Tesco</b>	60	58	63	62	62	61	59	60	-2	0
<b>Apple</b>	51	50	57	58	59	57	57	58	0	7
<b>Virgin</b>	55	53	59	57	59	58	57	54	-1	-1
<b>Vodafone</b>	48	46	50	50	52	48	52	49	4	1
<b>Ford</b>	49	43	54	53	55	52	51	48	-1	-1
<b>Disney</b>	51	47	55	55	55	50	54	48	4	-3
<b>BT</b>	43	47	49	49	53	51	49	48	-2	5
<b>Coca Cola</b>	48	44	49	49	50	46	50	46	4	-2
<b>HSBC</b>	40	41	49	47	46	48	47	44	-1	4
<b>British Gas</b>	39	41	44	44	46	47	44	43	-3	4
<b>BP</b>	44	41	48	46	47	47	45	43	-2	-1
<b>British Airways</b>	43	42	46	46	44	44	46	42	2	-1
<b>McDonald's</b>	36	36	42	39	41	41	42	38	1	2

## ALL CONSUMERS' THERMOMETER

Please rate the following companies on the basis of your overall impressions of their general behaviour. 100 means you would go out of your way to buy their products or services and advise others such as friends and family to do the same and 1 means you would avoid buying their products and services and advise others such as friends and family to do the same. 50 means you have no particular feelings either way. You can use any number from 1 to 100, the higher the number the more favourable your overall impressions are. [ALL CONSUMERS]

	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Sep-09	Nov-09	Feb-10	<i>Change since last survey</i>	<i>Change since last year</i>
<b>Google</b>	68	67	70	71	72	72	71	73	68	-5	=
<b>M&amp;S</b>	59	59	61	62	64	63	67	66	64	-2	+5
<b>Tesco</b>	63	61	64	64	64	64	63	63	62	-1	-1
<b>Apple</b>	52	49	55	55	58	57	57	58	56	-2	+4
<b>Virgin</b>	56	54	58	56	59	58	60	58	55	-3	-1
<b>Disney</b>	54	50	56	57	58	55	59	57	53	-4	-1
<b>Coca-Cola</b>	51	48	52	53	53	52	52	54	51	-3	=
<b>Vodafone</b>	48	47	50	50	52	50	51	51	49	-2	+1
<b>Ford</b>	49	47	53	53	54	54	53	53	49	-4	=
<b>BT</b>	44	46	50	48	53	51	51	49	47	-2	+3
<b>HSBC</b>	40	42	48	46	48	48	50	48	45	-3	+5
<b>BP</b>	45	43	48	46	49	48	47	46	44	-2	-1
<b>British Gas</b>	40	41	45	45	47	46	46	46	44	-2	+4
<b>BA</b>	45	43	45	45	46	44	46	47	43	-4	-2
<b>McDonald's</b>	40	40	45	44	44	47	45	46	42	-4	+2

**SECTOR FOCUS – HOME AND GARDEN COMPANIES, CONCERNED CONSUMERS THERMOMETER**

Please rate the following companies on the basis of your overall impressions of their general behaviour. 100 means you would go out of your way to buy their products or services and advise others such as friends and family to do the same and 1 means you would avoid buying their products and services and advise others such as friends and family to do the same. 50 means you have no particular feelings either way. You can use any number from 1 to 100, the higher the number the more favourable your overall impressions are. [CONCERNED CONSUMERS ONLY]

	<b>Feb-08</b>	<b>Feb-09</b>	<b>Feb-10</b>	<i><b>Change since last year</b></i>
<b>John Lewis</b>	59	54	61	+7
<b>Argos</b>			60	N/A
<b>M&amp;S Home</b>	59	54	59	+5
<b>B&amp;Q</b>	61	57	57	=
<b>Ikea</b>	58	56	57	+1
<b>Homebase</b>	58	53	55	+2
<b>Habitat</b>	50	46	49	+3
<b>Next Homeware</b>			48	N/A
<b>Magnet</b>	46	43	48	+5
<b>DFS</b>	41	39	39	=

**SECTOR FOCUS – HOME AND GARDEN COMPANIES. ALL CONSUMERS THERMOMETER**

Please rate the following companies on the basis of your overall impressions of their general behaviour. 100 means you would go out of your way to buy their products or services and advise others such as friends and family to do the same and 1 means you would avoid buying their products and services and advise others such as friends and family to do the same. 50 means you have no particular feelings either way. You can use any number from 1 to 100, the higher the number the more favourable your overall impressions are. [ALL CONSUMERS]

	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change since last year</b>
<b>Argos</b>		62	N/A
<b>B&amp;Q</b>	57	58	+1
<b>John Lewis</b>	53	57	+4
<b>M&amp;S Home</b>	53	57	+4
<b>Ikea</b>	56	56	=
<b>Homebase</b>	53	55	+2
<b>Next Homeware</b>		48	N/A
<b>Habitat</b>	45	48	+3
<b>Magnet</b>	43	46	+3
<b>DFS</b>	40	41	+1

Do you think home and garden companies are doing enough to tackle social and environmental issues?

		Feb-08	Feb-09	Feb-10	Change
<b>Concerned Consumers</b>	<b>Yes</b>	36%	39%	50%	+11%
	<b>No</b>	64%	61%	50%	-11%

		Feb-09	Feb-10	Change
<b>All Consumers</b>	<b>Yes</b>	47%	58%	+11%
	<b>No</b>	53%	42%	-11%

On a scale of 1 to 5, how well do you think each home and garden company is doing at addressing social and environmental issues (e.g. supplier relations, working conditions, carbon footprint, use of resources etc)? Where 1 means not well at all and 5 means exceptionally well.

Concerned Consumers	Feb-09	Feb-10	Change
Ikea	3.09	3.25	+0.16
John Lewis	2.93	3.24	+0.31
B&Q	3.07	3.20	+0.13
M&S Home	2.87	3.19	+0.32
Homebase	2.91	3.12	+0.21
Argos		3.00	N/A
Habitat	2.73	2.98	+0.25
Magnet	2.6	2.91	+0.31
Next Homeware	2.67	2.88	+0.21
DFS	2.46	2.72	0.26

All Consumers	Feb-09	Feb-10	Change
B&Q	3.11	3.26	+0.15
Ikea	3.13	3.22	+0.09
John Lewis	2.97	3.18	+0.21
Homebase	2.99	3.16	+0.17
M&S Home	2.91	3.16	+0.25
Argos		3.11	N/A
Habitat	2.77	2.94	+0.17
Next Homeware	2.75	2.91	+0.16
Magnet	2.7	2.89	+0.19
DFS	2.57	2.75	+0.18

If you had to choose, which of these do you think it is more important for home and garden companies to address?

<b>Concerned Consumers</b>	<b>Feb-08</b>	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
Social issues	45%	40%	48%	+8%
Environmental issues	55%	60%	52%	-8%

<b>All Consumers</b>	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
Social issues	44%	51%	+7%
Environmental issues	56%	49%	-7%



**How concerned are you about the following? [CONCERNED CONSUMERS]**

<b>CONCERNED CONSUMERS</b>		<b>Feb-08</b>	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
The use of child labour in the production of home and garden products	Very concerned	59%	61%	60%	-1%
	Quite concerned	30%	25%	30%	+5%
	Fairly unconcerned	9%	9%	8%	-1%
	Not at all concerned	2%	5%	1%	-4%
The working conditions of employees throughout the supply chain	Very concerned	31%	23%	28%	5%
	Quite concerned	49%	53%	48%	-5%
	Fairly unconcerned	16%	20%	22%	+2%
	Not at all concerned	4%	5%	2%	-3%
The impact home and garden stores have on local communities	Very concerned	18%	15%	18%	+3%
	Quite concerned	49%	47%	39%	-8%
	Fairly unconcerned	28%	31%	35%	+4%
	Not at all concerned	6%	6%	8%	+2%
The way home and garden stores use natural resources such as wood	Very concerned	31%	27%	24%	-3%
	Quite concerned	48%	46%	49%	+3%
	Fairly unconcerned	19%	24%	23%	-1%
	Not at all concerned	2%	4%	4%	=
The CO2 emissions associated with the manufacture and transportation of home and garden products	Very concerned	32%	29%	31%	+2%
	Quite concerned	48%	48%	43%	-5%
	Fairly unconcerned	18%	19%	22%	+3%
	Not at all concerned	2%	5%	4%	-1%
Potential health dangers of the chemicals used in house and garden products	Very concerned	47%	46%	48%	+2%
	Quite concerned	40%	39%	37%	-2%
	Fairly unconcerned	11%	12%	12%	=
	Not at all concerned	2%	3%	3%	=

**How concerned are you about the following? [ALL CONSUMERS]**

<b>ALL CONSUMERS</b>		<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
The use of child labour in the production of home and garden products	Very concerned	52%	49%	-3%
	Quite concerned	28%	33%	+5%
	Fairly unconcerned	14%	14%	=
	Not at all concerned	5%	4%	-1%
The working conditions of employees throughout the supply chain	Very concerned	18%	21%	+3%
	Quite concerned	48%	43%	-5%
	Fairly unconcerned	28%	30%	+2%
	Not at all concerned	6%	6%	=
The impact home and garden stores have on local communities	Very concerned	12%	13%	+1%
	Quite concerned	41%	37%	-4%
	Fairly unconcerned	35%	39%	+4%
	Not at all concerned	12%	11%	-1%
The way home and garden stores use natural resources such as wood	Very concerned	19%	17%	-2%
	Quite concerned	43%	45%	+2%
	Fairly unconcerned	30%	29%	-1%
	Not at all concerned	8%	8%	=
The CO2 emissions associated with the manufacture and transportation of home and garden products	Very concerned	23%	21%	-2%
	Quite concerned	45%	41%	-4%
	Fairly unconcerned	23%	30%	+7%
	Not at all concerned	9%	8%	-1%
Potential health dangers of the chemicals used in house and garden products	Very concerned	39%	38%	-1%
	Quite concerned	39%	38%	-1%
	Fairly unconcerned	17%	20%	+3%
	Not at all concerned	5%	4%	-1%

On a scale of 1 to 5, how important would you say the following factors are in determining your choice of home or garden products? Where 1 means they are completely unimportant and 5 means they are very important indeed.

<b>CONCERNED CONSUMERS</b>	<b>Feb-08</b>	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
Quality	4.23	4.26	4.22	-0.04
Price	3.96	4.08	4.10	+0.02
Social factors such as whether the product has been manufactured using child labour	3.97	4.02	3.99	-0.03
Comfort / ease of use	3.91	3.92	3.94	+0.02
The environmental impact of the resources used (e.g. whether the timber was sustainably sourced)	3.87	3.77	3.78	+0.01
Design	3.7	3.70	3.75	+0.05
The amount of CO2 emitted through the production and transportation of the product	3.57	3.48	3.46	-0.02

<b>ALL CONSUMERS</b>	<b>Feb-09</b>	<b>Feb-10</b>	<b>Change</b>
Quality	4.21	4.21	=
Price	4.15	4.17	+0.02
Comfort / ease of use	3.94	3.95	+0.01
Social factors such as whether the product has been manufactured using child labour	3.85	3.80	-0.05
Design	3.68	3.76	+0.08
The environmental impact of the resources used (e.g. whether the timber was sustainably sourced)	3.61	3.57	-0.04
The amount of CO2 emitted through the production and transportation of the product	3.31	3.28	-0.03

Do you think you normally have enough information about the environmental and social impacts of home and garden products to enable you to make an informed choice about which products to choose?

Concerned Consumers	Feb-09	Feb-10	Change
Yes	21%	27%	+6%
No	79%	73%	-6%

All Consumers	Feb-09	Feb-10	Change
Yes	26%	32%	+6%
No	74%	68%	-6%

Would you find it useful to have the following when you buy home and garden products?

CONCERNED CONSUMERS		Feb-09	Feb-10	Change
A 'carbon label' which tells you how much carbon is generated over the course of a product's average lifecycle (from production, transportation, use, disposal)	Yes	84%	83%	-1%
	No	16%	17%	+1%
Information on all of the chemicals which the product contains	Yes	89%	90%	+1%
	No	11%	10%	-1%
Information on recycling	Yes	91%	96%	+5%
	No	9%	4%	-5%
Information on the eco-efficiency of a product (e.g. a water tap, a light etc.)	Yes	88%	89%	+1%
	No	12%	11%	-1%

ALL CONSUMERS		Feb-09	Feb-10	Change
A 'carbon label' which tells you how much carbon is generated over the course of a product's average lifecycle (from production, transportation, use, disposal)	Yes	76%	74%	-2%
	No	24%	26%	+2%
Information on all of the chemicals which the product contains	Yes	86%	84%	-2%
	No	14%	16%	+2%
Information on recycling	Yes	88%	90%	+2%
	No	12%	10%	-2%
Information on the eco-efficiency of a product (e.g. a water tap, a light etc.)	Yes	83%	83%	=
	No	17%	17%	=

Have you heard of the Forest Stewardship Council (FSC)?

CONCERNED CONSUMERS	Feb-08	Feb-09	Feb-10	Change
Yes	32%	32%	30%	-2%
No	68%	68%	70%	+2%

ALL CONSUMERS	Feb-09	Feb-10	Change
Yes	27%	26%	-1%
No	73%	74%	+1%

Do you think home and garden manufacturers should have to take away your old furniture and dispose of it in a responsible way (e.g. by recycling or reusing it)?

CONCERNED CONSUMERS	Feb-08	Feb-09	Feb-10	Change
Yes	86%	80%	82%	+2%
No	14%	20%	18%	-2%

ALL CONSUMERS	Feb-09	Feb-10	Change
Yes	80%	80%	=
No	20%	20%	=

Do you think the focus on home improvements in popular culture encourages people to buy furniture that they do not really need?

CONCERNED CONSUMERS	Feb-08	Feb-09	Feb-10	Change
Yes	89%	87%	86%	-1%
No	11%	13%	14%	+1%

ALL CONSUMERS	Feb-09	Feb-10	Change
Yes	81%	80%	-1%
No	19%	20%	+1%

Have you recently scaled-back any of your home improvement plans as a result of the current economic climate?

CONCERNED CONSUMERS	Feb-09	Feb-10	Change
Yes	61%	59%	-2%
No	39%	41%	+2%

ALL CONSUMERS	Feb-09	Feb-10	Change
Yes	55%	55%	=
No	45%	45%	=

There is lots of talk at the moment about the economy – the stock market troubles, house prices, interest rates and so on. Which of the following best describes how you would be likely to respond if you had to cut back on your consumer spending?

<b>Concerned Consumers</b>	<b>Feb-09</b>	<b>Mar-09</b>	<b>Apr-09</b>	<b>May-09</b>	<b>Jun-09</b>	<b>Jun-09</b>	<b>Jul-09</b>	<b>Nov-09</b>	<b>Feb-09</b>
<b>I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra</b>	59%	53%	59%	55%	50%	56%	50%	59%	62%
<b>I would be more likely to buy products and services that represented the best value for money regardless of the company's ethical or environmental credentials</b>	41%	47%	41%	45%	50%	44%	50%	41%	38%

<b>All Consumers</b>	<b>Feb-09</b>	<b>Mar-09</b>	<b>Apr-09</b>	<b>May-09</b>	<b>Jun-09</b>	<b>Jul-09</b>	<b>Sep-09</b>	<b>Nov-09</b>	<b>Feb-09</b>
<b>I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra</b>	45%	40%	42%	40%	35%	35%	42%	40%	48%
<b>I would be more likely to buy products and services that represented the best value for money regardless of the company's ethical or environmental credentials</b>	55%	60%	58%	60%	65%	65%	58%	60%	52%