

CONCERNED CONSUMERS SUMMARY -- FEBRUARY 2009

Populus interviewed 1,031 adults aged 18+ online between 20th and 23rd February 2009. 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.

(Concerned Consumers n=506)

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-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	<i>Change since last month</i>	<i>Change since last year</i>
Google	70	68	76	73	71	71	72	71	72	73	68	67	67	0	-3
Marks & Spencer	67	65	68	64	63	60	61	63	64	65	65	60	60	0	-7
Tesco	58	59	63	59	59	59	60	60	63	61	61	55	60	+5	+2
Virgin	57	58	55	54	54	55	58	58	57	59	57	56	55	-1	-2
Apple	56	57	58	53	57	56	58	55	58	57	56	54	51	-3	-5
Disney	53	54	57	57	51	51	55	52	55	55	52	49	51	+2	-2
Ford	48	50	52	53	49	49	52	50	50	49	52	48	49	+1	+1
Coca Cola	45	44	48	50	45	48	50	45	50	49	48	44	48	+4	+3
Vodafone	48	48	50	46	47	46	49	50	49	48	49	48	48	0	0
BP	43	42	46	41	40	40	43	41	44	45	43	42	44	+2	+1
British Airways	45	43	40	39	40	43	42	41	45	47	43	46	43	-3	-2
BT	46	46	49	46	47	48	51	46	51	50	45	45	43	-2	-3
HSBC	46	49	49	47	49	46	47	50	49	49	46	44	40	-4	-6
British Gas	36	40	42	40	37	39	39	37	42	42	40	39	39	0	+3
McDonald's	32	37	39	36	34	39	38	38	40	37	37	34	36	+2	+4

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]

	Dec-08	Jan-09	Feb-09	<i>Change since last month</i>
Google	70	68	68	0
Tesco	63	60	63	+3
M&S	64	60	59	-1
Virgin	56	57	56	-1
Disney	56	51	54	+3
Apple	55	53	52	-1
Coca-Cola	52	48	51	+3
Ford	53	50	49	-1
Vodafone	49	47	48	+1
BA	45	46	45	-1
BP	44	45	45	0
BT	47	48	44	-4
British Gas	40	40	40	0
HSBC	47	45	40	-5
McDonald's	43	40	40	0

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]

	Feb-08	Feb-09	<i>Change since last year</i>
B&Q	61	57	-4
Ikea	58	56	-2
John Lewis	59	54	-5
M&S Home	59	54	-5
Homebase	58	53	-5
Habitat	50	46	-4
Magnet	46	43	-3
DFS	41	39	-2

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]

	Feb-09
B&Q	57
Ikea	56
Homebase	53
M&S Home	53
John Lewis	53
Habitat	45
Magnet	43
DFS	40

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

		Feb-08	Feb-09	Change
Concerned Consumers	Yes	36%	39%	+3%
	No	64%	61%	-3%

		Feb-09
All Consumers	Yes	47%
	No	53%

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
Ikea	3.09
B&Q	3.07
John Lewis	2.93
Homebase	2.91
M&S Home	2.87
Habitat	2.73
Next Homeware	2.67
Magnet	2.60
DFS	2.46

All Consumers	Feb-09
Ikea	3.13
B&Q	3.11
Homebase	2.99
John Lewis	2.97
M&S Home	2.91
Habitat	2.77
Next Homeware	2.75
Magnet	2.70
DFS	2.57

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

Concerned Consumers	Feb-08	Feb-09	Change
Social issues	45%	40%	-5%
Environmental issues	55%	60%	+5%

All Consumers	Feb-09
Social issues	44%
Environmental issues	56%

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

CONCERNED CONSUMERS		Feb-08	Feb-09	Difference
The use of child labour in the production of home and garden products	Very concerned	59%	61%	+2%
	Quite concerned	30%	25%	-5%
	Fairly unconcerned	9%	9%	0%
	Not at all concerned	2%	5%	+3%
The working conditions of employees throughout the supply chain	Very concerned	31%	23%	-8%
	Quite concerned	49%	53%	+4%
	Fairly unconcerned	16%	20%	+4%
	Not at all concerned	4%	5%	+1%
The impact home and garden stores have on local communities	Very concerned	18%	15%	-3%
	Quite concerned	49%	47%	-2%
	Fairly unconcerned	28%	31%	+3%
	Not at all concerned	6%	6%	0%
The way home and garden stores use natural resources such as wood	Very concerned	31%	27%	-4%
	Quite concerned	48%	46%	-2%
	Fairly unconcerned	19%	24%	+5%
	Not at all concerned	2%	4%	+2%
The CO2 emissions associated with the manufacture and transportation of home and garden products	Very concerned	32%	29%	-3%
	Quite concerned	48%	48%	0%
	Fairly unconcerned	18%	19%	+1%
	Not at all concerned	2%	5%	+3%
Potential health dangers of the chemicals used in house and garden products	Very concerned	47%	46%	-1%
	Quite concerned	40%	39%	-1%
	Fairly unconcerned	11%	12%	+1%
	Not at all concerned	2%	3%	1%

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

ALL CONSUMERS		Feb-09
The use of child labour in the production of home and garden products	Very concerned	52%
	Quite concerned	28%
	Fairly unconcerned	14%
	Not at all concerned	5%
The working conditions of employees throughout the supply chain	Very concerned	18%
	Quite concerned	48%
	Fairly unconcerned	28%
	Not at all concerned	6%
The impact home and garden stores have on local communities	Very concerned	12%
	Quite concerned	41%
	Fairly unconcerned	35%
	Not at all concerned	12%
The way home and garden stores use natural resources such as wood	Very concerned	19%
	Quite concerned	43%
	Fairly unconcerned	30%
	Not at all concerned	8%
The CO2 emissions associated with the manufacture and transportation of home and garden products	Very concerned	23%
	Quite concerned	45%
	Fairly unconcerned	23%
	Not at all concerned	9%
Potential health dangers of the chemicals used in house and garden products	Very concerned	39%
	Quite concerned	39%
	Fairly unconcerned	17%
	Not at all concerned	5%

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.

CONCERNED CONSUMERS	Feb-08	Feb-09	<i>Change since Feb-08</i>
Quality	4.23	4.26	<i>+0.03</i>
Price	3.96	4.08	<i>+0.12</i>
Social factors such as whether the product has been manufactured using child labour	3.97	4.02	<i>+0.05</i>
Comfort / ease of use	3.91	3.92	<i>+0.01</i>
The environmental impact of the resources used (e.g. whether the timber was sustainably sourced)	3.87	3.77	<i>-0.10</i>
Design	3.70	3.70	<i>-</i>
The amount of CO2 emitted through the production and transportation of the product	3.57	3.48	<i>-0.09</i>

ALL CONSUMERS	Feb-09
Quality	4.21
Price	4.15
Comfort / ease of use	3.94
Social factors such as whether the product has been manufactured using child labour	3.85
Design	3.68
The environmental impact of the resources used (e.g. whether the timber was sustainably sourced)	3.61
The amount of CO2 emitted through the production and transportation of the product	3.31

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
Yes	21%
No	79%

All Consumers	Feb-09
Yes	26%
No	74%

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

CONCERNED CONSUMERS		Feb-09
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%
	No	16%
Information on all of the chemicals which the product contains	Yes	89%
	No	11%
Information on recycling	Yes	91%
	No	9%
Information on the eco-efficiency of a product (e.g. a water tap, a light etc.)	Yes	88%
	No	12%

ALL CONSUMERS		Feb-09
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%
	No	24%
Information on all of the chemicals which the product contains	Yes	86%
	No	14%
Information on recycling	Yes	88%
	No	12%
Information on the eco-efficiency of a product (e.g. a water tap, a light etc.)	Yes	83%
	No	17%

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

CONCERNED CONSUMERS	Feb-08	Feb-09	Change since Feb-08
Yes	32%	32%	–
No	68%	68%	–

ALL CONSUMERS	Feb-09
Yes	27%
No	73%

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	Change since Feb-08
Yes	86%	80%	-6%
No	14%	20%	+6%

ALL CONSUMERS	Feb-09
Yes	80%
No	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	Change since Feb-08
Yes	89%	87%	-2%
No	11%	13%	+2%

ALL CONSUMERS	Feb-09
Yes	81%
No	19%

Does the level of packaging on an Easter Egg influence your decision about which one to buy?

CONCERNED CONSUMERS	Feb-08	Feb-09	<i>Change since Feb-08</i>
Yes	28%	30%	2%
It's one factor among many	47%	44%	-3%
No	19%	18%	-1%
Don't know	7%	8%	1%

ALL CONSUMERS	Feb-09
Yes	22%
It's one factor among many	40%
No	29%
Don't know	8%

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

CONCERNED CONSUMERS	Feb-09
Yes	61%
No	39%

ALL CONSUMERS	Feb-09
Yes	55%
No	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?

Concerned Consumers	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09
I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra	69%	65%	63%	58%	56%	55%	55%	59%	56%	60%	60%	58%	59%
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	31%	35%	37%	42%	44%	45%	45%	41%	44%	40%	40%	42%	41%

All Consumers	Nov-08	Dec-08	Jan-09	Feb-09
I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra	40%	44%	41%	45%
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	60%	56%	59%	55%