

CONCERNED CONSUMERS SUMMARY – AUGUST 2010

Populus interviewed 1,037 adults aged 18+ online between 20th and 23rd August 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.

(Concerned Consumers n=464)

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]

	Jul-09	Nov-09	Feb-10	May-10	May-10 (2)	Jun-10	Aug-10	<i>Change since last survey</i>
Google	70	72	68	65	73	73	72	-1
Marks & Spencer	64	65	65	62	68	65	63	-2
Tesco	61	59	60	59	63	62	60	-2
Apple	57	57	58	50	59	62	60	-2
Disney	50	54	48	45	57	58	56	-2
Virgin	58	57	54	51	56	57	56	-1
Ford	52	51	48	44	53	54	53	-1
Coca Cola	46	50	46	43	53	52	52	=
HSBC	48	47	44	43	51	49	49	=
Vodafone	48	52	49	44	50	48	49	+1
BT	51	49	48	42	52	50	47	-3
McDonald's	41	42	38	37	40	41	45	+4
British Gas	47	44	43	39	46	49	44	-5
BP	47	45	43	35	42	44	41	-3
British Airways	44	46	42	38	43	37	40	+3

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]

	Jul-09	Nov-09	Feb-10	May-10	May-10 (2)	Jun-10	Aug-10	<i>Change since last survey</i>
Google	72	73	68	65	72	74	74	=
Tesco	64	63	62	60	65	65	64	-1
M&S	63	66	64	59	66	65	63	-2
Apple	57	58	56	47	58	61	60	-1
Disney	55	57	53	44	59	59	59	=
Virgin	58	58	55	51	56	57	57	=
Coca-Cola	52	54	51	44	55	56	56	=
Ford	54	53	49	43	54	55	56	+1
Vodafone	50	51	49	44	52	49	50	+1
British Gas	46	46	44	41	48	50	49	-1
BT	51	49	47	43	51	52	49	-3
McDonald's	47	46	42	40	46	45	48	+3
HSBC	48	48	45	41	50	50	46	-4
BP	48	46	44	34	42	41	45	+4
BA	44	47	43	38	42	43	43	=

SECTOR FOCUS – ENERGY 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]

	Aug-07	Aug-08	Aug-10	<i>Change since 2008</i>
npower	46	41	46	+5
Good Energy	48	47	45	-2
British Gas	43	39	44	+5
E.ON	47	44	44	=
EDF	42	43	43	=
Scottish Power	45	43	43	=
United Utilities	42	41	43	+2
SSE (Swalec / Scottish Hydro / Southern Electric)	44	-	42	
Ecotricity	44	44	40	-4

If you had to choose, which of the following do you think it is most important for energy companies to address? [Concerned Consumers]

Concerned Consumers	Social Issues	34%
	Environmental Issues	66%

Do you think energy companies are doing enough to address environmental issues? [Concerned Consumers]

		Aug-07	Aug-08	Aug-10	Change
Concerned Consumers	Yes	14%	13%	36%	+23%
	No	86%	87%	64%	-23%

On a scale of 1 to 5, how well do you think each energy company is doing at addressing environmental issues? Where 1 means not well at all and 5 means exceptionally well. [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
E.ON	3.19	2.84	3.33	+0.49
British Gas	2.79	2.60	3.32	+0.72
Scottish Power	2.85	2.80	3.27	+0.47
Good Energy	3.00	2.92	3.21	+0.29
EDF	2.92	2.85	3.18	+0.33
npower	2.99	2.60	3.18	+0.58
SSE (Swalec / Scottish Hydro / Southern Electric)	2.77	2.86	3.15	+0.29
Ecotricity	3.02	2.82	3.11	+0.29
United Utilities	2.65	2.47	2.83	+0.36

On a scale of 1 to 5, how well do you think each energy company is doing at addressing social issues? Where 1 means not well at all and 5 means exceptionally well. [Concerned Consumers]

E.ON	3.12
Ecotricity	3.08
British Gas	3.07
Good Energy	3.02
npower	2.97
EDF	2.94
SSE (Swalec / Scottish Hydro / Southern Electric)	2.90
United Utilities	2.89
Scottish Power	2.84

On a scale of 1 to 5, how important would you say the following factors are in determining your choice of energy supplier or your decision to stay with the same energy supplier? Where 1 means they are completely unimportant and 5 means they are very important indeed. [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
Price	4.40	4.43	4.50	+0.07
Customer service	4.33	4.22	4.27	+0.05
How hard they are working to use resources effectively and reduce waste	4.05	3.88	4.05	+0.17
Their level of investment in renewable energy	3.99	3.85	3.97	+0.12
The extent to which they help me become more environmentally efficient	3.94	3.80	3.86	+0.06
How hard they are working to address climate change	3.93	3.78	3.80	+0.02
Their approach to biodiversity	3.70	3.50	3.60	+0.1
Product range	3.53	3.46	3.58	+0.12
Whether my family or friends recommend them	2.98	2.88	3.06	+0.18
It's the one I've always used and I can't be bothered to change	2.40	2.31	2.57	+0.26

Which of the following best describes your understanding of a "green" electricity tariff? [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
The electricity supplied to my house will be from renewable sources	35%	33%	40%	+7%
The supplier increases the amount of renewable energy it generates in total	24%	27%	23%	-4%
The supplier makes a contribution on my behalf to support new renewable energy development	29%	28%	26%	-2%
The supplier is selling me the renewable energy that they have to generate by law, no additional renewable energy is being generated	12%	12%	14%	+2%

Which of the following do you think has the greatest impact on the environment? [Concerned Consumers]

Flying to Europe twice a year	35%
Heating your home for a year	24%
Driving your car for a year	29%
Regularly buying products that have been grown or manufactured abroad	12%

What measures, if any, have you taken in the last 12 months to cut your energy bills at home? [Concerned Consumers]

	Aug-08	Aug-10	Change
Turned out lights	94%	79%	-15%
Fitted low energy light bulbs	84%	83%	-1%
Turned down thermostat	78%	67%	-11%
Installed loft insulation	29%	36%	+7%
Fitted double glazing	23%	27%	+4%
Fitted new boiler	18%	25%	+7%

Which of the following measures, if any, do you plan to take in the next 12 months to cut your energy bills at home? [Concerned Consumers]

Turn out lights	30%
Turn down thermostat	24%
Install loft insulation	12%
Fitted low energy light bulbs	26%
Fitted new boiler	14%
Fitted double glazing	11%

Over the last 12 months have you received any energy efficient light bulbs from your energy supplier? [Concerned Consumers]

Concerned Consumers	Yes	43%
	No	52%

Have you used the bulbs you received? [Those who received bulbs]

Concerned Consumers	Yes	93%
	No	7%

Which of the following best describes your opinion of nuclear power? [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
I support it entirely and think it is the best way to tackle climate change	17%	18%	19%	+1%
I think it may have a role to play in our overall energy mix in the future	63%	65%	65%	=
I oppose the use of nuclear power under any circumstance	20%	18%	16%	-2%

Which of the following do you think should take most responsibility for addressing climate change? [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
Government	49%	54%	44%	-10%
Energy companies	20%	22%	25%	+3%
Individuals	31%	24%	31%	+7%

Do you think the UK has any chance of meeting its EU target for 20% of its total energy supply to come from renewables by 2020? [Concerned Consumers]

	Aug-07	Aug-08	Aug-10	Change
Yes	32%	30%	41%	+11%
No	68%	70%	59%	-11%

Do you agree or disagree with the following statements? If you don't know, please say so. [Concerned Consumers]

		Aug-08	Aug-10	Change
I believe the price rises that many energy companies have recently passed on to their consumers are merely the companies profiteering from the current global market conditions	Agree	85%	81%	-4%
	Disagree	6%	5%	-1%
	Don't know	9%	14%	+5%
I believe the Government should include new coal-fired power stations as part of the future energy mix for Britain	Agree	42%	36%	-6%
	Disagree	29%	34%	+5%
	Don't know	29%	31%	+2%

Thinking about the next year, are you likely to do any of the following? [Concerned Consumers]

	Aug-08	Aug-10	Change
Change your electricity supplier due to price rises	41%	32%	-9%
Cut your energy bills by improving the efficiency of your house (e.g. loft insulation, double glazing, new boiler etc.)	39%	33%	-6%
Change your gas supplier due to price rises	36%	28%	-8%
Move to a fixed price energy tariff (i.e. price fixed at current rates for next 2-3 years)	34%	20%	-14%
Find out more about installing micro-generation technology on your house (e.g. solar panels, wind turbine etc.)	28%	23%	-5%