

## CONCERNED CONSUMERS SUMMARY -- DECEMBER 2008

Populus interviewed 1,043 adults aged 18+ online between 12<sup>th</sup> and 15<sup>th</sup> December 2008. 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=448)

## 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]

	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	<i>Change since last month</i>	<i>Change since last year</i>
<b>Google</b>	68	74	70	68	76	73	71	71	72	71	72	73	68	-5	0
<b>Marks &amp; Spencer</b>	67	64	67	65	68	64	63	60	61	63	64	65	65	0	-2
<b>Tesco</b>	60	60	58	59	63	59	59	59	60	60	63	61	61	0	1
<b>Virgin</b>	59	59	57	58	55	54	54	55	58	58	57	59	57	-2	-2
<b>Apple</b>	56	56	56	57	58	53	57	56	58	55	58	57	56	-1	0
<b>Disney</b>	53	53	53	54	57	57	51	51	55	52	55	55	52	-3	-1
<b>Ford</b>	47	53	48	50	52	53	49	49	52	50	50	49	52	+3	5
<b>Vodafone</b>	49	48	48	48	50	46	47	46	49	50	49	48	49	+1	0
<b>Coca Cola</b>	43	46	45	44	48	50	45	48	50	45	50	49	48	-1	5
<b>HSBC</b>	48	44	46	49	49	47	49	46	47	50	49	49	46	-3	-2
<b>BT</b>	45	46	46	46	49	46	47	48	51	46	51	50	45	-5	0
<b>British Airways</b>	45	51	45	43	40	39	40	43	42	41	45	47	43	-4	-2
<b>BP</b>	44	45	43	42	46	41	40	40	43	41	44	45	43	-2	-1
<b>British Gas</b>	44	40	36	40	42	40	37	39	39	37	42	42	40	-2	-4
<b>McDonald's</b>	34	34	32	37	39	36	34	39	38	38	40	37	37	0	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]

	Dec-08
Google	70
M&S	64
Tesco	63
Virgin	56
Disney	56
Apple	55
Ford	53
Coca-Cola	52
Vodafone	49
BT	47
HSBC	47
BA	45
BP	44
McDonald's	43
British Gas	40

## SECTOR FOCUS –TOY 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>Dec-07</b>	<b>Dec-08</b>	<b>Change since last year</b>
Lego	63	63	0
Early Learning Centre	64	63	-1
BBC		59	N/A
Fisher Price		59	N/A
Hornby		56	N/A
Disney	53	52	-1
Mattel	50	51	+1
Toys R Us	55	51	-4
Tomy		50	N/A
Hamleys	51	49	-2
Playmobil	48	49	+1
Hasbro	43	46	+3

**SECTOR FOCUS – TOY 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>Dec-08</b>
Lego	63
Early Learning Centre	62
BBC	59
Fisher Price	59
Disney	56
Hornby	56
Mattel	53
Toys R Us	53
Tomy	51
Playmobil	49
Hamleys	49
Hasbro	47

Do you think toy companies are doing enough to address social and environmental issues?

		Dec-07	Dec-08	Change
<b>Concerned Consumers</b>	Yes	18%	26%	+8
	No	82%	74%	-8

		Dec-08
<b>All Consumers</b>	Yes	36%
	No	64%

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

<b>Concerned Consumers</b>	Dec-08
Early Learning Centre	3.45
Lego	3.32
Fisher Price	3.17
BBC Toys (Teletubbies, Dr Who, In the Night Garden, etc)	3.12
Hornby (Scalextric, Airfix etc)	3.05
Disney	3.03
Hamleys	2.94
Tomy	2.83
Playmobil	2.82
Toys R Us	2.79
Mattel (Barbie, Matchbox etc)	2.72
Hasbro (Action Man, My Little Pony etc)	2.66

<b>All Consumers</b>	Dec-08
Early Learning Centre	3.38
Lego	3.26
Fisher Price	3.14
BBC Toys (Teletubbies, Dr Who, In the Night Garden, etc)	3.09
Disney	3.07
Hornby (Scalextric, Airfix etc)	3.06
Hamleys	2.94
Playmobil	2.91
Toys R Us	2.89
Tomy	2.86
Mattel (Barbie, Matchbox etc)	2.78
Hasbro (Action Man, My Little Pony etc)	2.77

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

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
Social issues	42%	46%	+4
Environmental issues	58%	54%	-4

<b>All Consumers</b>	Dec-08
Social issues	49%
Environmental issues	51%



On a scale of 1 to 5, how concerned are you about each of the following? Where 1 means not at all concerned and 5 means very concerned indeed

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
The safety of toys made in developing countries such as China	4.29	4.38	+0.09
The way toy companies advertise to children	4.17	4.10	-0.07
The extent to which some toys are linked to violence	4.12	4.05	-0.07
The conditions of workers in developing countries such as China	4.08	4.09	+0.01
The packaging on toys	3.97	3.97	0
Toys which encourage children to grow up too fast		3.93	N/A
The environmental impact of toy production and use	3.93	3.80	-0.13

<b>All Consumers</b>	Dec-08
The safety of toys made in developing countries such as China	4.19
The extent to which some toys are linked to violence	3.93
The conditions of workers in developing countries such as China	3.89
The way toy companies advertise to children	3.87
Toys which encourage children to grow up too fast	3.82
The packaging of toys	3.73
The environmental impact of toy production and use	3.53

Do you think children today tend to have too many toys?

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
Yes	92%	95%	+3
No	8%%	5%	-1

<b>All Consumers</b>	Dec-08
Yes	91%
No	9%

Do you agree or disagree with the following statements?

<b>Concerned Consumers</b>	Agree		Change
	Dec-07	Dec-08	
I think that advertisements for toys on television lead to children pressuring their parents to buy them	96%	97%	+1
I think parents often buy toys because of pressure from their children	96%	94%	-2
I think that advertisements on television pressurise parents into buying more toys whether their children ask for them or not	74%	78%	+4
There's nothing wrong in some advertisements being aimed at children, it is up to the parents to say no	60%	61%	+1

<b>All Consumers</b>	Agree - Dec-08
I think that advertisements for toys on television lead to children pressuring their parents to buy them	94%
I think parents often buy toys because of pressure from their children	90%
I think that advertisements on television pressurise parents into buying more toys whether their children ask for them or not	70%
There's nothing wrong in some advertisements being aimed at children, it is up to the parents to say no	63%

Which of the following would you most like toy companies to do?

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
Move all production processes back to their country of origin	30%	37%	7%
Use their influence over young people to tackle social issues like bullying and racism	25%	26%	1%
Use their influence over young people to encourage them to live in a more environmentally friendly way	18%	17%	-1%
Radically reduce their environmental impact	21%	14%	-7%
Make a commitment to trying to break cultural stereotypes	5%	6%	+1%

<b>All Consumers</b>	Dec-08
Move all production processes back to their country of origin	37%
Use their influence over young people to tackle social issues like bullying and racism	31%
Use their influence over young people to encourage them to live in a more environmentally friendly way	14%
Radically reduce their environmental impact	12%
Make a commitment to trying to break cultural stereotypes	6%

Do you think it is positive or negative for toy manufacturers to:

Make more toys that are traditional (e.g. board games)

	Concerned Consumers	All Consumers
<b>NET: POSITIVE</b>	<b>78%</b>	<b>76%</b>
<b>Very positive</b>	36%	33%
<b>Somewhat positive</b>	42%	43%
<b>Neither positive nor negative</b>	21%	23%
<b>Somewhat negative</b>	1%	1%
<b>Very negative</b>	0%	0%
<b>NET: NEGATIVE</b>	<b>1%</b>	<b>1%</b>

Make toys that reflect cultural differences (e.g. dolls from different cultures)

	Concerned Consumers	All Consumers
<b>NET: POSITIVE</b>	<b>61%</b>	<b>56%</b>
<b>Very positive</b>	23%	20%
<b>Somewhat positive</b>	38%	36%
<b>Neither positive nor negative</b>	31%	34%
<b>Somewhat negative</b>	5%	7%
<b>Very negative</b>	3%	3%
<b>NET: NEGATIVE</b>	<b>8%</b>	<b>10%</b>

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 ONLY]

Concerned Consumers	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	June-08	July-08	Aug-08	Sept-08	Oct-08	Nov-08	Dec-08
I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra	69%	63%	69%	65%	63%	58%	56%	55%	55%	59%	56%	60%	60%
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%	37%	31%	35%	37%	42%	44%	45%	45%	41%	44%	40%	40%

All Consumers	Nov-08	Dec-08
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%
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%

Please indicate whether you agree or disagree with the following statements about Christmas and the activities surrounding it.

It has become overly-commercialised

CONCERNED CONSUMERS	Dec-07	Dec-08	Change
<b>NET: AGREE</b>	93%	89%	-4%
Agree strongly	77%	73%	-4%
Agree slightly	16%	16%	0%
Neither agree nor disagree	5%	8%	+3%
Disagree slightly	1%	1%	0%
Disagree strongly	1%	1%	0%
<b>NET: DISAGREE</b>	2%	3%	+1%

	ALL CONSUMERS
<b>NET: AGREE</b>	89%
Agree strongly	67%
Agree slightly	22%
Neither agree nor disagree	8%
Disagree slightly	2%
Disagree strongly	1%
<b>NET: DISAGREE</b>	3%

It damages the environment

CONCERNED CONSUMERS	Dec-07	Dec-08	Change
<b>NET: AGREE</b>	47%	53%	+6%
Agree strongly	16%	19%	+3%
Agree slightly	31%	34%	+3%
Neither agree nor disagree	35%	31%	-4%
Disagree slightly	12%	8%	-4%
Disagree strongly	7%	9%	+2%
<b>NET: DISAGREE</b>	19%	16%	-3%

	ALL CONSUMERS
<b>NET: AGREE</b>	42%
Agree strongly	14%
Agree slightly	28%
Neither agree nor disagree	37%
Disagree slightly	11%
Disagree strongly	10%
<b>NET: DISAGREE</b>	21%



It has lost its religious significance

CONCERNED CONSUMERS	Dec-07	Dec-08	Change
<b>NET: AGREE</b>	88%	83%	-5%
Agree strongly	61%	53%	-8%
Agree slightly	27%	29%	+2%
Neither agree nor disagree	9%	11%	+2%
Disagree slightly	1%	4%	+3%
Disagree strongly	1%	2%	+1%
<b>NET: DISAGREE</b>	2%	6%	+4%

	ALL CONSUMERS
<b>NET: AGREE</b>	82%
Agree strongly	48%
Agree slightly	34%
Neither agree nor disagree	13%
Disagree slightly	4%
Disagree strongly	2%
<b>NET: DISAGREE</b>	6%

To what extent do you take into account issues like ethical sourcing and sustainability when choosing which Christmas presents to buy?

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
A great extent	11%	17%	+6%
Some extent	66%	63%	-3%
No extent	23%	20%	-3%

<b>All Consumers</b>	Dec-08
A great extent	10%
Some extent	52%
No extent	38%

Have you heard of schemes like Oxfam Unwrapped or Good Gifts where you give presents – like farming tools, safe water or livestock – that help fight poverty and disease on someone else's behalf?

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
Yes	82%	73%	-9%
No	18%	27%	+9%

<b>All Consumers</b>	Dec-08
Yes	68%
No	32%

Have you bought someone you know a gift from somewhere like Oxfam Unwrapped or Good Gifts? [Asked only of those who said 'Yes' to previous question]

<b>Concerned Consumers</b>	Dec-07	Dec-08	Change
Yes	31%	35%	+4%
No	69%	65%	-4%

<b>All Consumers</b>	Dec-08
Yes	29%
No	71%

On a scale of 1–5, where 1 means not at all and 5 means completely, how much do you trust these organisations and individuals when they endorse particular products and services?

	Concerned Consumers	All Consumers
National charities	3.24	3.21
International charities	2.99	2.95
Academics	2.85	2.81
Government	2.29	2.30
Media	2.22	2.29