

CONCERNED CONSUMERS SUMMARY -- JANUARY 2009

Populus interviewed 1,026 adults aged 18+ online between 23rd and 26th January 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=458)

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]

	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Change since last month	Change since last year
Google	74	70	68	76	73	71	71	72	71	72	73	68	67	-1	-7
Marks & Spencer	64	67	65	68	64	63	60	61	63	64	65	65	60	-5	-4
Virgin	59	57	58	55	54	54	55	58	58	57	59	57	56	-1	-3
Tesco	60	58	59	63	59	59	59	60	60	63	61	61	55	-6	-5
Apple	56	56	57	58	53	57	56	58	55	58	57	56	54	-2	-2
Disney	53	53	54	57	57	51	51	55	52	55	55	52	49	-3	-4
Ford	53	48	50	52	53	49	49	52	50	50	49	52	48	-4	-5
Vodafone	48	48	48	50	46	47	46	49	50	49	48	49	48	-1	0
British Airways	51	45	43	40	39	40	43	42	41	45	47	43	46	3	-5
BT	46	46	46	49	46	47	48	51	46	51	50	45	45	0	-1
HSBC	44	46	49	49	47	49	46	47	50	49	49	46	44	-2	0
Coca Cola	46	45	44	48	50	45	48	50	45	50	49	48	44	-4	-2
BP	45	43	42	46	41	40	40	43	41	44	45	43	42	-1	-3
British Gas	40	36	40	42	40	37	39	39	37	42	42	40	39	-1	-1
McDonald's	34	32	37	39	36	34	39	38	38	40	37	37	34	-3	0

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	<i>Change since last month</i>
Google	70	68	-2
M&S	64	60	-4
Tesco	63	60	-3
Virgin	56	57	1
Apple	55	53	-2
Disney	56	51	-5
Ford	53	50	-3
BT	47	48	1
Coca-Cola	52	48	-4
Vodafone	49	47	-2
BA	45	46	1
HSBC	47	45	-2
BP	44	45	1
British Gas	40	40	0
McDonald's	43	40	-3

SECTOR FOCUS – HOLIDAY 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]

	Jan-08	Jan-09	Change since last year
Virgin Holidays	52	50	-2
Expedia	51	48	-3
CenterParcs	51	47	-4
Thomas Cook	50	47	-3
Thomson	N/A	47	N/A
Kuoni	N/A	43	N/A
First choice	46	43	-3
BA Holidays	45	41	-4
Cosmos	N/A	41	N/A
Responsible travel.com	42	40	-2
Airtours	45	40	-5
Mark Warner	41	40	-1
Butlins	44	39	-5

SECTOR FOCUS – HOLIDAY 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]

	Jan-09
Virgin Holidays	51
Expedia	48
Thomas Cook	48
CenterParcs	48
Thomson	48
First choice	44
BA Holidays	42
Kuoni	42
Cosmos	41
Butlins	41
Airtours	41
Mark Warner	40
Responsible travel.com	40

BANKS THERMOMETER RATINGS: CONCERNED AND ALL CONSUMERS THERMOMETER

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	Concerned Consumers	Total
Co-operative Bank	54	51
Lloyds TSB	45	46
Abbey	44	45
HSBC	44	45
NatWest	44	46
Halifax (HBOS)	41	45
Barclays	40	43
RBS	36	37

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

		Jan-08	Jan-09	Change
Concerned Consumers	Yes	18%	21%	3%
	No	82%	79%	-3%

		Jan-09
All Consumers	Yes	28%
	No	72%

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.

Concerned Consumers	Jan-09
CenterParcs	3.17
responsibletavel.com	2.91
Virgin Holidays	2.83
Butlins	2.78
Thomas Cook	2.75
Thomson	2.73
Expedia	2.72
First Choice	2.71
Kuoni	2.66
Mark Warner	2.65
BA Holidays	2.65
Airtours	2.57
Cosmos	2.57

All Consumers	Jan-09
CenterParcs	3.19
responsibletavel.com	2.91
Virgin Holidays	2.91
Butlins	2.86
Thomas Cook	2.83
Thomson	2.81
First Choice	2.80
Expedia	2.77
BA Holidays	2.72
Kuoni	2.72
Mark Warner	2.72
Airtours	2.68
Cosmos	2.66

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

Concerned Consumers	Jan-08	Jan-09	Change
Social issues	49%	49%	0
Environmental issues	51%	51%	0

All Consumers	Jan-09
Social issues	53%
Environmental issues	47%

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

Concerned Consumers	Jan-08	Jan-09	Change
Yes	15%	20%	5%
No	85%	80%	-5%

All Consumers	Jan-09
Yes	24%
No	76%

Would you find it useful to have the following when you buy a holiday? [% saying 'Yes']

Concerned Consumers	Jan-08	Jan-09	Change
Information on health and safety standards	91%	92%	1%
Information on the impact the holiday will have on the destination's local economy	88%	88%	0%
Information on the use of local suppliers and employees	88%	87%	-1%
Information on the local environmental impact of the holiday (e.g. water use, waste management etc)	86%	85%	-1%
A 'carbon label' which tells you the total carbon footprint of a holiday (transport, hotel, leisure activities etc)	78%	78%	0%

All Consumers	Jan-09
Information on health and safety standards	88%
Information on the impact the holiday will have on the destination's local economy	80%
Information on the use of local suppliers and employees	78%
Information on the local environmental impact of the holiday (e.g. water use, waste management etc)	75%
A 'carbon label' which tells you the total carbon footprint of a holiday (transport, hotel, leisure activities etc)	65%

Will you take any of the following actions as a result of concern for society and / or the environment?

Concerned Consumers	Jan-08	Jan-09	Change
Make an effort to find out more about the environmental and social impact of holidays	79%	74%	-5%
Choose holidays that are designed to be 'responsible', 'low-impact' or 'eco-friendly'	78%	73%	-5%
Take more holidays in the UK	73%	71%	-2%
Choose holiday destinations which can be reached by train or boat rather than flying	65%	67%	2%
Choose to offset the carbon impact of the holiday	62%	60%	-2%
Take fewer holidays	50%	55%	5%
Choose working holidays on which you actively contribute to society and the environment (e.g. volunteering to clear waste, help to build a school)	40%	34%	-6%
Choose an agritourism holiday (visiting and working on a farm)	27%	26%	-1%

All Consumers	Jan-09
Take more holidays in the UK	64%
Choose holidays that are designed to be 'responsible', 'low-impact' or 'eco-friendly'	62%
Make an effort to find out more about the environmental and social impact of holidays	61%
Choose holiday destinations which can be reached by train or boat rather than flying	55%
Choose to offset the carbon impact of the holiday	48%
Take fewer holidays	47%
Choose working holidays on which you actively contribute to society and the environment (e.g. volunteering to clear waste, help to build a school)	28%
Choose an agritourism holiday (visiting and working on a farm)	22%

Have you recently scaled back any holiday plans as a result of the current economic climate?

Concerned Consumers	Jan-08	Jan-09	Change
Yes	31%	50%	19%
No	69%	50%	-19%

All Consumers	Jan-09
Yes	46%
No	54%

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

All Consumers	Nov-08	Dec-08	Jan-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%
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%

Between school and either starting a job or going to university some people take a year out to volunteer working abroad. Overall, how beneficial do you think this is for the individual?

	Concerned Consumers	Total
Very beneficial	33%	30%
Quite beneficial	43%	41%
A little beneficial	18%	20%
Not beneficial at all	7%	10%

On a scale of 1 to 5, where 1 means not at all important and 5 means extremely important, how important do you think it is for people to experience cultures in other countries?

Concerned Consumers	Total
4.03	3.88

Which of these issues are you most concerned about? (Please tick all that apply.)

	Concerned Consumers	Total
Energy prices	73%	72%
Food prices	61%	64%
Petrol prices	47%	44%
The safety of my money in my bank(s)	47%	46%
Paying my mortgage / rent	30%	32%
Public transport prices	30%	27%
My pay rises not matching price rises	29%	31%
House prices	27%	26%
Repaying my overdraft / credit card	25%	26%
Losing my job	24%	25%

And over the next 12 months do you expect to do these things...[cont.]

		Total	Total Combined	Concerned	Concerned Combined
Buy luxury food	A lot less	33%	Less: 64%	30%	Less: 59%
	A little less	31%		29%	
	About the same as usual	35%		39%	
	A little more	1%	More: 1%	2%	More: 2%
	A lot more	0%		0%	
Make major purchases	A lot less	32%	Less: 59%	30%	Less: 56%
	A little less	28%		26%	
	About the same as usual	35%		37%	
	A little more	4%	More: 5%	5%	More: 7%
	A lot more	1%		2%	
Borrow money	A lot less	44%	Less: 56%	42%	Less: 55%
	A little less	12%		12%	
	About the same as usual	36%		38%	
	A little more	6%	More: 8%	6%	More: 7%
	A lot more	1%		1%	
Put money into investments	A lot less	36%	Less: 54%	33%	Less: 49%
	A little less	19%		16%	
	About the same as usual	37%		41%	
	A little more	8%	More: 9%	8%	More: 10%
	A lot more	1%		1%	

And over the next 12 months do you expect to do these things...

		Total	Total Combined	Concerned	Concerned Combined
Buy new household appliances	A lot less	27%	Less: 52%	26%	Less: 47%
	A little less	25%		21%	
	About the same as usual	43%		47%	
	A little more	5%	More: 5%	6%	More: 6%
	A lot more	0%		0%	
Take a holiday abroad	A lot less	29%	Less: 49%	29%	Less: 51%
	A little less	19%		23%	
	About the same as usual	43%		40%	
	A little more	8%	More: 9%	7%	More: 9%
	A lot more	1%		2%	
Go out to relax / socialise	A lot less	16%	Less: 43%	16%	Less: 44%
	A little less	28%		28%	
	About the same as usual	48%		48%	
	A little more	7%	More: 9%	7%	More: 8%
	A lot more	2%		1%	
Put money in savings	A lot less	21%	Less: 40%	20%	Less: 34%
	A little less	18%		14%	
	About the same as usual	41%		42%	
	A little more	17%	More: 20%	21%	More: 24%
	A lot more	3%		3%	

		Total	Total Combined	Concerned	Concerned Combined
Drive	A lot less	16%	Less: 34%	15%	Less: 38%
	A little less	18%		22%	
	About the same as usual	57%		55%	
	A little more	6%	More: 9%	6%	More: 8%
	A lot more	2%		2%	
Take money out of investments	A lot less	20%	Less: 31%	19%	Less: 29%
	A little less	11%		10%	
	About the same as usual	53%		51%	
	A little more	12%	More: 16%	15%	More: 20%
	A lot more	3%		5%	
Take money out of savings	A lot less	16%	Less: 27%	15%	Less: 26%
	A little less	11%		11%	
	About the same as usual	47%		47%	
	A little more	20%	More: 26%	19%	More: 27%
	A lot more	6%		8%	
Pay off debt	A lot less	13%	Less: 23%	15%	Less: 22%
	A little less	10%		8%	
	About the same as usual	56%		54%	
	A little more	16%	More: 21%	18%	More: 23%
	A lot more	5%		5%	

		Total	Total Combined	Concerned	Concerned Combined
Take a holiday in the UK	A lot less	13%	Less: 21%	12%	Less: 19%
	A little less	8%		8%	
	About the same as usual	52%		51%	
	A little more	23%	More: 28%	24%	More: 29%
	A lot more	5%		6%	
Take public transport	A lot less	11%	Less: 18%	9%	Less: 15%
	A little less	7%		6%	
	About the same as usual	61%		61%	
	A little more	14%	More: 20%	16%	More: 24%
	A lot more	6%		8%	
Stay in to relax / socialise	A lot less	3%	Less: 7%	2%	Less: 5%
	A little less	5%		3%	
	About the same as usual	49%		52%	
	A little more	28%	More: 44%	28%	More: 43%
	A lot more	16%		15%	

Which of these statements comes closest to your view, even if you do not agree with either exactly:

	Concerned Consumers	Total
The current economic situation is mostly caused by the economic cycle and no one in particular is responsible for it	11%	14%
The current economic situation is mostly caused by errors that could have been avoided and the people who made these errors are responsible for it	83%	77%
Don't know	6%	9%

On a scale of 1–5, where 1 means not at all responsible and 5 means very responsible, how responsible do you think each of these is for the current economic situation? If you don't have a clear view about how responsible any of them are, please say so. [Asked only of those who believe the current economic situation is mostly caused by errors that could be avoided]

	Concerned Consumers	Total
American Banks	4.42	4.44
UK Banks	4.36	4.37
Private financial services companies	4.30	4.27
Companies that took on debt they couldn't afford	4.25	4.32
The US Government	4.25	4.24
Regulators (e.g. the Financial Services Authority)	4.23	4.26
The UK Government	4.10	4.15
People who took on debt they couldn't afford	4.10	4.14
The Bank of England	3.87	3.91

Some companies are thinking about offering employees a period of unpaid leave to try and help the company survive the current economic situation. How good an idea do you think this is?

	Concerned Consumers	Total
It is a very good idea	10%	9%
It is quite a good idea	45%	41%
It is quite a bad idea	21%	22%
It is a very bad idea	10%	14%
Don't know	15%	15%

If you were offered this unpaid leave in order to try and help your employer survive, how likely do you think you would be to take it?

	Concerned Consumers	Total
Very likely	9%	8%
Quite likely	33%	28%
Quite unlikely	20%	19%
Very unlikely	19%	25%
Don't know	19%	20%