

CONCERNED CONSUMERS SUMMARY -- NOVEMBER 2008

Populus interviewed 1,041 adults aged 18+ online between 21st and 24th November 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.

(Concerned Consumers n=455)

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]

	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Change since last month	Change since last year
Google	71	68	74	70	68	76	73	71	71	72	71	72	73	+1	+2
Marks & Spencer	67	67	64	67	65	68	64	63	60	61	63	64	65	+1	-2
Tesco	62	60	60	58	59	63	59	59	59	60	60	63	61	-2	-1
Virgin	58	59	59	57	58	55	54	54	55	58	58	57	59	+2	+1
Apple	56	56	56	56	57	58	53	57	56	58	55	58	57	-1	+1
Disney	54	53	53	53	54	57	57	51	51	55	52	55	55	=	+1
BT	46	45	46	46	46	49	46	47	48	51	46	51	50	-1	+4
Coca Cola	42	43	46	45	44	48	50	45	48	50	45	50	49	-1	+7
HSBC	48	48	44	46	49	49	47	49	46	47	50	49	49	+1	+1
Ford	48	47	53	48	50	52	53	49	49	52	50	50	49	-1	+1
Vodafone	47	49	48	48	48	50	46	47	46	49	50	49	48	-1	+1
British Airways	45	45	51	45	43	40	39	40	43	42	41	45	47	+1	+2
BP	45	44	45	43	42	46	41	40	40	43	41	44	45	+1	=
British Gas	44	44	40	36	40	42	40	37	39	39	37	42	42	=	-2
McDonald's	34	34	34	32	37	39	36	34	39	38	38	40	37	-3	+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. [CONCERNED CONSUMERS ONLY]

	Nov-08
Google	73
Tesco	65
M&S	64
Virgin	59
Disney	56
Apple	56
Coca-Cola	53
Ford	51
HSBC	50
Vodafone	49
BT	49
BA	46
BP	44
McDonald's	42

SECTOR FOCUS – FAST FOOD 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]

	Nov-07	Nov-08	Change since last year
Subway	51	52	+1
Costa Coffee	49	47	-2
Pizza Hut	45	46	+1
Pret a Manger	44	44	=
Wild Bean Cafe	45	43	-2
Starbucks	45	42	-3
KFC	39	38	-1
McDonald's	34	37	+3
Burger King	35	36	+1

SECTOR FOCUS – FAST FOOD 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. [CONCERNED CONSUMERS ONLY]

	Nov-08
Subway	50
Pizza Hut	48
Costa Coffee	47
Starbucks	43
KFC	42
McDonald's	42
Pret a Manger	42
Wild Bean Cafe	41
Burger King	39

Do you think the following sectors are doing enough to tackle social and environmental issues?

Concerned Consumers		Nov-07	Nov-08	Change
Coffee shops (e.g. Starbucks, Costa Coffee)	Yes	36%	32%	-4
	No	64%	68%	+4
Fast food outlets (e.g. McDonald's, Pret a Manger)	Yes	16%	22%	+6
	No	84%	78%	-6

All Consumers		Nov-08
Coffee shops (e.g. Starbucks, Costa Coffee)	Yes	36%
	No	64%
Fast food outlets (e.g. McDonald's, Pret a Manger)	Yes	27%
	No	73%

On a scale of 1 to 5, how well do you think each food and drink outlet is doing at addressing social issues? Where 1 means not well at all and 5 means exceptionally well.

Concerned Consumers	Nov-07	Nov-08	Change
Costa Coffee	2.86	2.76	-0.1
Subway	2.72	2.70	-0.02
Wild Bean Cafe	2.76	2.69	-0.07
Starbucks	2.7	2.66	-0.04
Pret a Manger	2.63	2.62	-0.01
Pizza Hut	2.54	2.59	+0.05
McDonald's	2.18	2.36	+0.18
Burger King	2.26	2.36	+0.10
KFC	2.23	2.29	+0.06

All Consumers	Nov-08
Subway	2.79
Costa Coffee	2.77
Pizza Hut	2.72
Starbucks	2.72
Wild Bean Cafe	2.69
Pret a Manger	2.64
McDonald's	2.56
Burger King	2.51
KFC	2.48

On a scale of 1 to 5, how well do you think each food and drink outlet is doing at addressing environmental issues? – Where 1 means not well at all and 5 means exceptionally well.

Concerned Consumers	Nov-07	Nov-08	Change
Costa Coffee	2.69	2.63	-0.06
Wild Bean Cafe	2.66	2.58	-0.08
Pret a Manger	2.54	2.51	-0.03
Starbucks	2.57	2.48	-0.09
Subway	2.59	2.45	-0.14
Pizza Hut	2.41	2.42	+0.01
McDonald's	2.19	2.22	+0.03
Burger King	2.21	2.21	+0.00
KFC	2.15	2.21	+0.06

All Consumers	Nov-08
Costa Coffee	2.69
Wild Bean Cafe	2.64
Subway	2.61
Starbucks	2.60
Pret a Manger	2.59
Pizza Hut	2.56
McDonald's	2.45
KFC	2.42
Burger King	2.39

If you had to choose, which of these do you think it is more important for food and drink outlets to address?

Concerned Consumers	Nov-07	Nov-08	Change
Social issues	45%	44%	-1
Environmental issues	55%	56%	+1

All Consumers	Nov-08
Social issues	48%
Environmental issues	52%

Can fast food ever be good for you?

Concerned Consumers	Nov-07	Nov-08	Change
Yes	57%	67%	+10%
No	43%	33%	-10%

All Consumers	Nov-08
Yes	66%
No	34%

On a scale of 1 to 5, how important would you say the following factors are in determining where to eat or drink on the high street, where 1 is not important at all and 5 is very important?

Concerned Consumers	Nov-07	Nov-08	Change
Quality	4.54	4.50	-0.04
Customer service	4.33	4.30	-0.03
Healthiness of choices	4.3	4.11	-0.19
Price	3.95	4.04	+0.09
Ethical issues such as the treatment of suppliers, worker conditions etc	3.95	3.90	-0.05
Restaurant / coffee shop environment	3.79	3.78	-0.01
Availability of organic / fair-trade options	3.67	3.56	-0.11
Speed	3.37	3.45	+0.08

All Consumers	Nov-08
Quality	4.45
Customer service	4.22
Price	4.10
Healthiness of choices	3.93
Restaurant / coffee shop environment	3.73
Ethical issues such as the treatment of suppliers, worker conditions, etc.	3.56
Speed	3.51
Availability of organic / fair-trade options	3.24

Which of the following would you most like food and drink outlets to do?

Concerned Consumers	Nov-07	Nov-08	Change
Ensure workers are treated fairly and paid well	31%	30%	-1
Apply the standards of fair-trade to all their supplier relations	19%	20%	+1
Radically reduce the carbon footprint of their operations	21%	17%	-4
Overhaul their menu and only offer healthy choices	14%	14%	=
Make animal welfare their highest priority	8%	13%	+5
Protect the diversity of the high street by limiting growth	7%	6%	-1

All Consumers	Nov-08
Ensure workers are treated fairly and paid well	35%
Apply the standards of fair-trade to all their supplier relations	17%
Radically reduce the carbon footprint of their operations	17%
Overhaul their menu and only offer healthy choices	15%
Make animal welfare their highest priority	9%
Protect the diversity of the high street by limiting growth	7%

Should there be a ban on advertising fast food to children?

Concerned Consumers	Nov-07	Nov-08	Change
Yes	77%	73%	-4%
No	23%	27%	+4%

All Consumers	Nov-08
Yes	67%
No	33%

Do you think that coffee shops and fast food outlets should offer a choice of free trade or fair trade coffee or do you think they should only sell fair-trade coffee?

Concerned Consumers	Nov-07	Nov-08	Change
A choice of coffees	68%	69%	+1
Only fair-trade coffee	32%	31%	-1

All Consumers	Nov-08
A choice of coffees	78%
Only fair-trade coffee	22%

Which of these issues are you most concerned about?

	CONCERNED CONSUMERS	ALL CONSUMERS
Energy prices	79%	77%
Food prices	73%	74%
Petrol prices	55%	52%
The safety of my money in my bank(s)	47%	42%
My pay rises not matching price rises	42%	38%
Public transport prices	35%	30%
House prices	31%	26%
Paying my mortgage / rent	30%	32%
Repaying my overdraft / credit card	27%	26%
Losing my job	24%	23%

Do you agree or disagree with the following statements?

- In a recession companies will cut back on the social and environmental activities that they do

	CONCERNED CONSUMERS	ALL CONSUMERS
NET: AGREE	58%	55%
Strongly agree	17%	13%
Somewhat agree	42%	42%
Neither agree nor disagree	28%	33%
Somewhat disagree	8%	8%
Strongly disagree	5%	3%
NET: DISAGREE	14%	11%

- In a recession companies should cut back spending on social and environmental activities to keep prices down

	CONCERNED CONSUMERS	ALL CONSUMERS
NET: AGREE	28%	34%
Strongly agree	7%	10%
Somewhat agree	20%	24%
Neither agree nor disagree	24%	31%
Somewhat disagree	33%	25%
Strongly disagree	15%	9%
NET: DISAGREE	48%	35%

- Consumers should be prepared to pay extra to ensure companies are still able to continue social and environmental initiatives in a downturn

	CONCERNED CONSUMERS	ALL CONSUMERS
NET: AGREE	35%	28%
Strongly agree	7%	4%
Somewhat agree	28%	23%
Neither agree nor disagree	34%	35%
Somewhat disagree	22%	26%
Strongly disagree	9%	12%
NET: DISAGREE	31%	38%

- I have a higher opinion of companies that continue to spend money on social and environmental activities even when economic conditions are difficult

	CONCERNED CONSUMERS	ALL CONSUMERS
NET: AGREE	75%	61%
Strongly agree	36%	23%
Somewhat agree	39%	38%
Neither agree nor disagree	19%	30%
Somewhat disagree	4%	7%
Strongly disagree	2%	2%
NET: DISAGREE	6%	9%

Many companies produce a corporate responsibility or sustainability report each year to inform a range of audiences (e.g. customers, suppliers, investors) about the environmental and social activity they are involved in. Which of the following best matches your knowledge of them?

	CONCERNED CONSUMERS	ALL CONSUMERS
I know of these reports and regularly read them	5%	3%
I know of these reports and sometimes read them	32%	22%
I know of these reports but I never read them	32%	34%
I didn't know that companies produce these reports	32%	40%

Recently the Government agreed to provide public funding to rescue a number of banks in the UK. Do you think the same backing should be given to other industries that are experiencing difficulties?

	CONCERNED CONSUMERS	ALL CONSUMERS
Yes	52%	48%
No	24%	25%
Don't know	24%	27%

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

All Consumers	Nov-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%
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%

In the absence of any other way of tackling the environmental impact of flying, if you had to choose, would you personally be prepared to: [CONCERNED CONSUMERS ONLY]

Concerned Consumers	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	July-08	Aug-08	Sept-08	Oct-08	Nov-08
Fly less often	57%	54%	59%	57%	56%	58%	50%	55%	53%	53%	58%	54%	55%
Pay more to fly each time	14%	12%	13%	13%	11%	11%	10%	11%	11%	11%	11%	11%	12%
Neither	30%	33%	28%	30%	33%	30%	40%	35%	35%	36%	30%	35%	32%

All Consumers	Nov-08
Fly less often	46%
Pay more to fly each time	10%
Neither	44%