

CONCERNED CONSUMERS SUMMARY -- OCTOBER 2008

Populus interviewed 1,137 adults aged 18+ online between 24th and 27th October 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=497)

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]

	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	<i>Change since last month</i>	<i>Change since last year</i>
Google	70	71	68	74	70	68	76	73	71	71	72	71	72	1	2
Marks & Spencer	64	67	67	64	67	65	68	64	63	60	61	63	64	1	-
Tesco	63	62	60	60	58	59	63	59	59	59	60	60	63	3	-
Apple	57	56	56	56	56	57	58	53	57	56	58	55	58	3	1
Virgin	56	58	59	59	57	58	55	54	54	55	58	58	57	-1	1
Disney	53	54	53	53	53	54	57	57	51	51	55	52	55	3	2
BT	45	46	45	46	46	46	49	46	47	48	51	46	51	5	6
Coca Cola	48	42	43	46	45	44	48	50	45	48	50	45	50	5	2
Ford	50	48	47	53	48	50	52	53	49	49	52	50	50	0	-
HSBC	47	48	48	44	46	49	49	47	49	46	47	50	49	-1	2
Vodafone	47	47	49	48	48	48	50	46	47	46	49	50	49	-1	2
British Airways	45	45	45	51	45	43	40	39	40	43	42	41	45	4	-
BP	44	45	44	45	43	42	46	41	40	40	43	41	44	3	-
British Gas	42	44	44	40	36	40	42	40	37	39	39	37	42	5	-
McDonald's	34	34	34	34	32	37	39	36	34	39	38	38	40	2	6

SECTOR FOCUS – CLOTHING RETAILERS

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]

	Oct-08	Oct-07	Change
M&S	64	64	+0
George (Asda)	62	61	+1
Debenhams	58	n / a	n / a
Cherokee (Tesco)	56	54	+2
Matalan	56	57	-1
Tu (Sainsbury's)	55	n / a	n / a
Next	55	55	-
Primark	53	57	-4
New Look	52	n / a	n / a
Topshop	49	47	+2
Monsoon	48	n / a	n / a
Gap	46	44	+2
Stella McCartney	44	41	+3
Armani	43	43	-
ASOS	40	n / a	n / a
Louis Vuitton	39	n / a	n / a

Do you think clothing retailers are doing enough to tackle social and environmental issues? [CONCERNED CONSUMERS ONLY]

	Oct-08	Oct-07	<i>Difference</i>
Yes	22%	18%	+4%
No	78%	82%	-4%

If you had to choose, which of these do you think it is more important for clothing retailers to address, social issues or environmental issues? [CONCERNED CONSUMERS ONLY]

	Oct-08	Oct-07	<i>Difference</i>
Social issues	68%	69%	-1%
Environmental issues	32%	31%	+1%

On a scale of 1 to 5, how well do you think each clothing retailer is doing at addressing social and environmental issues? Where 1 means not well at all and 5 means exceptionally well. [CONCERNED CONSUMERS ONLY]

M&S	3.39
George (Asda)	3.08
Debenhams	3.02
Stella McCartney	3.01
Tu (Sainsbury's)	2.99
Cherokee (Tesco)	2.98
Next	2.88
Monsoon	2.79
Matalan	2.78
Gap	2.77
Topshop	2.74
New Look	2.70
Armani	2.61
ASOS	2.59
Louis Vuitton	2.56
Primark	2.54

On a scale of 1 to 5 how important would you say the following factors are in determining where to buy an item of clothing?
Where 1 means not important at all and 5 means very important indeed. [CONCERNED CONSUMERS ONLY]

	Oct-08	Oct-07	Change
Quality	4.20	n / a	<i>n / a</i>
Price	4.12	4.14	<i>-0.02</i>
Service	3.77	3.83	<i>-0.06</i>
Range	3.75	3.88	<i>-0.13</i>
Style	3.75	3.78	<i>-0.03</i>
Commitment to social and environmental issues	3.60	3.72	<i>-0.12</i>
Convenience	3.48	3.55	<i>-0.07</i>
Brand	2.77	n / a	<i>n / a</i>

Which of the following would you most like clothes retailers to do? [CONCERNED CONSUMERS ONLY]

	Oct-08	Oct-07	Difference
Ensure workers in developing countries are treated fairly	45%	47%	<i>-2%</i>
Commit to never testing anything on animals	16%	13%	<i>+3%</i>
Source all materials in the UK	12%	12%	<i>-</i>
Invest in the communities in which their stores are located	10%	11%	<i>-1%</i>
Commit to never using fur	9%	6%	<i>+3%</i>
Reduce the carbon footprint of all stores	8%	10%	<i>-2%</i>
Commit to only using organic cotton	1%	1%	<i>-</i>

Compared to 12 months ago, are you spending more, less or about the same on clothes?

	CONCERNED CONSUMERS
<i>NET: MORE</i>	12%
Significantly more	2%
Slightly more	10%
About the same	48%
Slightly less	27%
Significantly less	13%
<i>NET: LESS</i>	40%

Compared to 12 months ago, are you shopping for clothes in supermarkets more, less or about the same?

	CONCERNED CONSUMERS
<i>NET: MORE</i>	23%
Significantly more	4%
Slightly more	19%
About the same	56%
Slightly less	12%
Significantly less	9%
<i>NET: LESS</i>	21%

Do you think luxury brands are produced to higher ethical standards than cheaper brands? [CONCERNED CONSUMERS ONLY]

	Oct-08	Oct-07	<i>Difference</i>
Yes	19%	19%	-
No	81%	81%	-

Which of these issues are you most concerned about?

	CONCERNED CONSUMERS
Energy prices	78%
Food prices	73%
Petrol prices	55%
The safety of my money in my bank(s)	43%
My pay rises not matching price rises	36%
Paying my mortgage / rent	34%
Repaying my overdraft / credit card	29%
Public transport prices	25%
House prices	24%
Losing my job	20%

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
<i>NET: AGREE</i>	<i>58%</i>
Strongly agree	15%
Somewhat agree	43%
Neither agree nor disagree	31%
Somewhat disagree	8%
Strongly disagree	3%
<i>NET: DISAGREE</i>	<i>11%</i>

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

	CONCERNED CONSUMERS
<i>NET: AGREE</i>	<i>23%</i>
Strongly agree	9%
Somewhat agree	15%
Neither agree nor disagree	32%
Somewhat disagree	32%
Strongly disagree	13%
<i>NET: DISAGREE</i>	<i>45%</i>

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

	CONCERNED CONSUMERS
<i>NET: AGREE</i>	<i>34%</i>
Strongly agree	7%
Somewhat agree	27%
Neither agree nor disagree	38%
Somewhat disagree	21%
Strongly disagree	7%
<i>NET: DISAGREE</i>	<i>28%</i>

- 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
<i>NET: AGREE</i>	<i>70%</i>
Strongly agree	31%
Somewhat agree	39%
Neither agree nor disagree	22%
Somewhat disagree	6%
Strongly disagree	2%
<i>NET: DISAGREE</i>	<i>8%</i>

M&S are continuing to commit to its major social and environmental initiative (called Plan A) despite the economic downturn. How does this change your opinion of them?

	CONCERNED CONSUMERS
<i>NET: ADMIRE MORE</i>	<i>65%</i>
I admire them a lot more	23%
I admire them more	43%
It makes no difference to my opinion	34%
I admire them less	1%
I admire them a lot less	0%
<i>NET: ADMIRE LESS</i>	<i>1%</i>

Thinking generally about your spending this Christmas do you think you are going spend more, less or the about the same amount as last year?

	CONCERNED CONSUMERS
<i>NET: SPEND MORE</i>	11%
Significantly more	2%
Slightly more	9%
Stay about the same	43%
Slightly less	30%
Significantly less	17%
<i>NET: SPEND LESS</i>	47%

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]

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

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]

	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	July-08	Aug-08	Sept-08	Oct-08
Fly less often	52%	57%	54%	59%	57%	56%	58%	50%	55%	53%	53%	58%	54%
Pay more to fly each time	15%	14%	12%	13%	13%	11%	11%	10%	11%	11%	11%	11%	11%
Neither	33%	30%	33%	28%	30%	33%	30%	40%	35%	35%	36%	30%	35%