

CONCERNED CONSUMERS' SUMMARY -- MARCH 2007

Populus interviewed 1,004 adults aged 18+ online between March 23rd & 26th 2007. 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.populuslimited.com.

PROFILE OF A CONCERNED CONSUMER

Do you agree or disagree with the following statements?

	Agree	Disagree
I think that businesses have a broader responsibility to society than just offering their goods and services at the lowest possible price	91%	9%
There are some companies that I actively avoid buying anything from because of their social, environmental or ethical behaviour	57%	43%
When I am trying to choose between products and services that seem broadly similar I base my decision on my overall impression of the company behind the product or service	77%	23%
Agree with all 3 (Concerned Consumer)	48%	52%

How often, if ever do you usually do the following?

	Concerned Consumers			The rest		
	Often	Sometimes	Never	Often	Sometimes	Never
Recommend products & services I have bought to others	42%	57%	0%	30%	67%	3%
Listen to recommendations of others	35%	63%	1%	26%	72%	3%
Seek out information about companies I buy from	49%	45%	6%	33%	50%	18%

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	The rest
Google	68	67
Marks & Spencer	62	62
Tesco	60	67
Asda	60	65
Cadbury	59	66
Sainsbury's	58	59
Morrisons	57	59
Virgin	54	56
Waitrose	53	49
Apple	49	49
Ford	48	50
Disney	47	54
BT	47	50
British Airways	47	50
HSBC	46	46
BP	45	46
Vodafone	44	45
Coca Cola	43	52
British Gas	43	43
McDonalds	31	39

Have you consciously avoided buying a product or a service from a company in the last month because you're opposed to the way they behaved?

	Concerned Consumers	The rest
Yes	53%	18%
No	47%	82%

SECTOR FOCUS –SUPERMARKETS

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	The rest
Marks & Spencer	62	62
Tesco	60	67
Asda	60	65
Sainsbury's	58	59
Morrisons	57	59
Waitrose	53	49

On a scale of 1 to 5, how important would you say the following factors are in your choice of which supermarket chain you regularly shop at – where 1 means they are completely unimportant and 5 means they are very important indeed?

	Concerned Consumers	The rest
Value for money	4.35	4.40
How convenient they are to get to	4.12	4.20
How large a range of healthy products they stock	3.83	3.53
How much of their food they source from local suppliers	3.71	3.22
How well they treat and reward their employees	3.68	3.28
How green they are	3.59	3.05
How involved they are in the local community – e.g. donating to charities, sponsorships etc.	3.42	2.96
How organic they are	3.16	2.69

From everything you may have read or heard about them, how would you rate the following supermarkets on these attributes, on a scale of 1 to 5 where 1 means they are very poor and 5 means they are very good?

	Tesco		Waitrose		M&S		Sainsbury		ASDA		Morrisons	
	CC	Rest	CC	Rest	CC	Rest	CC	Rest	CC	Rest	CC	Rest
Value for money	3.68	3.85	2.97	2.69	3.18	2.96	3.37	3.25	3.73	3.91	3.47	3.49
How convenient they are to get to	3.81	3.82	2.36	2.17	3.14	3.06	3.41	3.46	3.33	3.48	3.15	3.16
How large a range of healthy products they stock	3.48	3.63	3.47	3.27	3.62	3.51	3.63	3.58	3.30	3.47	3.24	3.26
How much of their food they source from local suppliers	2.92	3.06	3.15	2.93	3.02	2.92	3.11	3.02	2.88	2.99	2.91	2.86
How well they treat and reward their employees	3.11	3.13	3.27	3.03	3.47	3.18	3.20	3.01	3.13	3.07	2.98	2.86
How green they are	3.13	3.18	3.10	2.88	3.23	3.02	3.19	3.07	2.97	2.97	2.90	2.86
How involved they are in the local community – e.g. donating to charities, sponsorships etc.	3.27	3.33	2.72	2.55	2.73	2.68	3.18	3.13	3.04	3.11	2.79	2.77
How organic they are	3.24	3.22	3.34	3.11	3.43	3.24	3.43	3.28	3.02	3.06	3.01	2.97

How far do you think the following statements applies to these supermarket chains?

% saying Absolutely/Mostly	Tesco		Waitrose		M&S		Sainsbury		ASDA		Morrisons	
	CC	Rest	CC	Rest	CC	Rest	CC	Rest	CC	Rest	CC	Rest
Lead the way on being green	39%	41%	35%	21%	41%	31%	43%	35%	28%	29%	21%	22%
Lead the way on cutting down on unhealthy ingredients like salt and hydrogenated fats	43%	48%	41%	29%	50%	41%	49%	44%	34%	39%	32%	29%
Promote unhealthy food like crisps through special offers and promotions	52%	42%	32%	30%	26%	26%	41%	36%	54%	42%	51%	43%
Back local food suppliers	23%	22%	31%	19%	27%	18%	29%	23%	19%	19%	19%	15%
Stock natural produce	36%	42%	42%	37%	48%	43%	43%	42%	31%	37%	32%	32%
Lead the way in labelling their products so that you know what you're buying.	58%	57%	51%	42%	59%	54%	61%	58%	47%	51%	45%	46%

Of the following factors, which would make you actively choose to shop at a particular supermarket chain?

	Concerned Consumers	The rest
A commitment to removing all chemicals from its food	74%	61%
A commitment to apply Fair Trade standards to all its suppliers	73%	55%
A commitment not to ever use landfill sites and to make all packaging compostable	66%	44%
A commitment to remove all packaging from fruit and vegetables	60%	47%
A commitment to only stock meat that has been produced entirely in Britain	49%	35%
A commitment to only stock produce that is naturally in season (e.g. no strawberries in winter)	43%	27%
A commitment to become entirely carbon neutral	40%	23%
A commitment that it will never grow bigger than it is now (i.e. it will not open any more branches)	18%	12%

And which would make you the MOST likely to actively choose to shop at a particular supermarket chain?

	Concerned Consumers	The rest
A commitment to removing all chemicals from its food	30%	27%
A commitment to apply Fair Trade standards to all its suppliers	25%	20%
A commitment not to ever use landfill sites and to make all packaging compostable	13%	15%
A commitment to only stock meat that has been produced entirely in Britain	12%	12%
A commitment to remove all packaging from fruit and vegetables	6%	15%
A commitment to become entirely carbon neutral	6%	4%
A commitment to only stock produce that is naturally in season (e.g. no strawberries in winter)	4%	5%
A commitment that it will never grow bigger than it is now (i.e. it will not open any more branches)	3%	1%

TOPICAL ISSUES

	% very/vaguely aware		% less/more likely to buy (net)		% impression affected a great deal/somewhat	
	CC	Rest	CC	Rest	CC	Rest
'Barclays exposed for aggressive selling practices'	71%	65%	-57%	-48%	76%	56%
'Tesco misleads shoppers with half price offers on fruit and veg'	62%	49%	-60%	-41%	72%	50%
'Walker's crisps carry first 'carbon labels''	31%	26%	+9%	+3%	47%	33%
'Airlines the fastest growing source of carbon emissions'	92%	85%	-32%	-18%	56%	31%
'Sky and Virgin squabble over broadcast rights'	88%	87%	-17%	-16%	50%	30%
'Unilever shuts final salary pension scheme'	32%	26%	-35%	-22%	49%	28%
'Private equity firms battle to buy Sainsbury'	47%	38%	-16%	-11%	33%	16%
'Marks & Spencer commits to go carbon neutral in the next five years'	49%	34%	+38%	+20%	64%	42%