

## CONCERNED CONSUMERS SUMMARY -- NOVEMBER 2009

Populus interviewed 1,048 adults aged 18+ online between 27<sup>th</sup> and 30<sup>th</sup> November 2009. The results have been weighted to be representative of all British adults. Populus is a member of the British Polling Council and abides by its rules. For more details please go to [www.populus.co.uk](http://www.populus.co.uk).

(Concerned Consumers n=452)

## 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]

	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Nov-09	Change since last survey	Change since last year
<b>Google</b>	72	71	72	73	68	67	67	66	72	71	72	70	72	+2	-1
<b>Marks &amp; Spencer</b>	61	63	64	65	65	60	60	60	64	63	65	64	65	+1	=
<b>Tesco</b>	60	60	63	61	61	55	60	58	63	62	62	61	59	-2	-2
<b>Virgin</b>	58	58	57	59	57	56	55	53	59	57	59	58	57	-1	-2
<b>Apple</b>	58	55	58	57	56	54	51	50	57	58	59	57	57	=	=
<b>Disney</b>	55	52	55	55	52	49	51	47	55	55	55	50	54	+4	-1
<b>Vodafone</b>	49	50	49	48	49	48	48	46	50	50	52	48	52	+4	+4
<b>Ford</b>	52	50	50	49	52	48	49	43	54	53	55	52	51	-1	+2
<b>Coca Cola</b>	50	45	50	49	48	44	48	44	49	49	50	46	50	+4	+1
<b>BT</b>	51	46	51	50	45	45	43	47	49	49	53	51	49	-2	-1
<b>HSBC</b>	47	50	49	49	46	44	40	41	49	47	46	48	47	-1	-2
<b>British Airways</b>	42	41	45	47	43	46	43	42	46	46	44	44	46	+2	-1
<b>BP</b>	43	41	44	45	43	42	44	41	48	46	47	47	45	-2	=
<b>British Gas</b>	39	37	42	42	40	39	39	41	44	44	46	47	44	-3	+2
<b>McDonald's</b>	38	38	40	37	37	34	36	36	42	39	41	41	42	+1	+5

## 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 ONLY]

	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Sep-09	Nov-09	<i>Change since last survey</i>
Google	70	68	68	67	70	71	72	72	71	73	+2
M&S	64	60	59	59	61	62	64	63	67	66	-1
Tesco	63	60	63	61	64	64	64	64	63	63	=
Virgin	56	57	56	54	58	56	59	58	60	58	-2
Apple	55	53	52	49	55	55	58	57	57	58	+1
Disney	56	51	54	50	56	57	58	55	59	57	-2
Coca-Cola	52	48	51	48	52	53	53	52	52	54	+2
Ford	53	50	49	47	53	53	54	54	53	53	=
Vodafone	49	47	48	47	50	50	52	50	51	51	=
BT	47	48	44	46	50	48	53	51	51	49	-2
HSBC	47	45	40	42	48	46	48	48	50	48	-2
BA	45	46	45	43	45	45	46	44	46	47	+1
BP	44	45	45	43	48	46	49	48	47	46	-1
British Gas	40	40	40	41	45	45	47	46	46	46	=
McDonald's	43	40	40	40	45	44	44	47	45	46	+1

**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]

	<b>Nov-07</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Subway	51	52	50	-2
Costa Coffee	49	47	49	+2
Pizza Hut	45	46	47	+1
Wild Bean Cafe	45	43	46	+3
Pret a Manger	44	44	45	+1
Starbucks	45	42	44	+2
Caffe Nero	-	-	42	-
McDonald's	34	37	42	+5
KFC	39	38	41	+3
Burger King	35	36	37	+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. [ALL CONSUMERS]

	Nov-08	Nov-09	Change since last year
Subway	50	50	=
Pizza Hut	48	49	+1
Costa Coffee	47	48	+1
McDonald's	42	46	+4
Starbucks	43	45	+2
Pret a Manger	42	44	+2
KFC	42	43	+1
Wild Bean Cafe	41	43	+2
Caffe Nero	-	41	-
Burger King	39	39	=

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

Concerned Consumers		Nov-07	Nov-08	Nov-09	Change since last year
Coffee shops (e.g. Starbucks, Costa Coffee)	Yes	36%	32%	34%	+2
	No	64%	68%	66%	-2
Fast food outlets (e.g. McDonald's, Pret a Manger)	Yes	16%	22%	24%	+2
	No	84%	78%	76%	-2

All Consumers		Nov-08	Nov-09	Change since last year
Coffee shops (e.g. Starbucks, Costa Coffee)	Yes	36%	39%	+3
	No	64%	61%	-3
Fast food outlets (e.g. McDonald's, Pret a Manger)	Yes	27%	32%	+5
	No	73%	68%	-5

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.

	<b>Concerned Consumers</b>	<b>All Consumers</b>
Costa Coffee	2.83	2.85
Pret a Manger	2.80	2.74
Starbucks	2.75	2.80
Wild Bean Cafe	2.74	2.70
Caffe Nero	2.72	2.71
Subway	2.71	2.75
Pizza Hut	2.62	2.70
McDonald's	2.50	2.69
Burger King	2.42	2.52
KFC	2.40	2.53

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

<b>Concerned Consumers</b>	<b>Nov-07</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Social issues	45%	44%	51%	+7
Environmental issues	55%	56%	49%	-7

<b>All Consumers</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Social issues	48%	54%	+6%
Environmental issues	52%	46%	-6%

Can fast food ever be good for you?

<b>Concerned Consumers</b>	<b>Nov-07</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Yes	57%	67%	60%	-7%
No	43%	33%	40%	+7%

<b>All Consumers</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Yes	66%	62%	-4%
No	34%	38%	+4%



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?

<b>Concerned Consumers</b>	<b>Nov-07</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Quality	4.54	4.5	4.47	-0.03
Customer service	4.33	4.3	4.12	-0.18
Healthiness of choices	4.3	4.11	4.06	-0.05
Ethical issues such as the treatment of suppliers, worker conditions etc	3.95	3.9	3.88	-0.02
Restaurant / coffee shop environment	3.79	3.78	3.83	+0.05
Price	3.95	4.04	3.83	-0.21
Availability of organic / fair-trade options	3.67	3.56	3.55	-0.01
Speed	3.37	3.45	3.29	-0.16

<b>All Consumers</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Quality	4.45	4.48	+0.03
Customer service	4.22	4.12	-0.10
Price	4.1	3.97	-0.13
Healthiness of choices	3.93	3.93	=
Restaurant / coffee shop environment	3.73	3.81	+0.08
Ethical issues such as the treatment of suppliers, worker conditions, etc.	3.56	3.60	+0.04
Speed	3.51	3.41	-0.10
Availability of organic / fair-trade options	3.24	3.21	-0.03

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

<b>Concerned Consumers</b>	<b>Nov-07</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Ensure workers are treated fairly and paid well	31%	30%	32%	+2%
Apply the standards of fair-trade to all their supplier relations	19%	20%	19%	-1%
Overhaul their menu and only offer healthy choices	14%	14%	15%	+1%
Radically reduce the carbon footprint of their operations	21%	17%	13%	-4%
Make animal welfare their highest priority	8%	13%	12%	-1%
Protect the diversity of the high street by limiting growth	7%	6%	9%	+3%

<b>All Consumers</b>	<b>Nov-08</b>	<b>Nov-09</b>	<b>Change since last year</b>
Ensure workers are treated fairly and paid well	35%	35%	=
Apply the standards of fair-trade to all their supplier relations	17%	16%	-1%
Overhaul their menu and only offer healthy choices	15%	16%	+1%
Radically reduce the carbon footprint of their operations	17%	14%	-3%
Make animal welfare their highest priority	9%	11%	+2%
Protect the diversity of the high street by limiting growth	7%	8%	+1%

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

Concerned Consumers	Nov-07	Nov-08	Nov-09	Change since last year
Yes	77%	73%	71%	-2%
No	23%	27%	29%	+2%

All Consumers	Nov-08	Nov-09	Change since last year
Yes	67%	64%	-3%
No	33%	36%	+3%

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	Nov-09	Change since last year
A choice of coffees	68%	69%	65%	-4%
Only fair-trade coffee	32%	31%	35%	+4%

All Consumers	Nov-08	Nov-09	Change since last year
A choice of coffees	78%	77%	-1%
Only fair-trade coffee	22%	23%	+1%

From what you know, which of these fast food outlets and coffee shops do you think gets its coffee beans from fair trade sources?

	<b>Concerned Consumers</b>	<b>All Consumers</b>
Costa Coffee	59%	57%
Starbucks	53%	50%
Wild Bean Cafe	42%	42%
Caffe Nero	38%	40%
Pret a Manger	22%	21%
McDonald's	20%	23%
Subway	11%	10%
Burger King	6%	6%
Pizza Hut	5%	5%
KFC	3%	4%

If an outlet selling coffee were to get its coffee beans entirely from fair trade sources, would this change your view of the company that produced it?

	Concerned Consumers	All Consumers
It would significantly improve my view of the company	33%	23%
It would slightly improve my view of the company	43%	38%
It would make no difference to my opinion	21%	32%
It would slightly worsen my view of the company	0%	1%
It would significantly worsen my view of the company	0%	0%
Don't know	4%	7%

**How aware are you of the following initiatives currently run by coffee shops?**

		<b>Concerned Consumers</b>	<b>All Consumers</b>
Starbucks' commitment to 100% Fair Trade coffee by 2010	Completely unaware	49%	58%
	Vaguely aware	38%	34%
	Fully aware	13%	8%
Costa Coffee's Foundation which invests in improving the lives of coffee growing communities	Completely unaware	50%	58%
	Vaguely aware	40%	33%
	Fully aware	10%	9%
Pret a Manger coffees are all certified Fair Trade, Rainforest Alliance and organic	Completely unaware	61%	69%
	Vaguely aware	32%	26%
	Fully aware	7%	5%

Which of these comes closest to your understanding when a restaurant in the UK states food is locally sourced?

	Concerned Consumers	All Consumers
Its food is sourced from the region	63%	62%
Its food is sourced from UK	21%	20%
Its food is sourced from the local town	10%	10%
Its food is grown at the restaurant	4%	2%
Don't know	3%	6%

Which of these comes closest to your understanding when a restaurant in the UK states its food is seasonal?

	Concerned Consumers	All Consumers
Its menu only has food and ingredients that are in season	64%	64%
Its food has been grown under natural conditions in the UK	13%	13%
Its food is fresh	11%	11%
It is possible to have food from different times of year	8%	8%
Don't know	3%	4%

Which of these comes closest to your understanding when a restaurant in the UK states its food is fresh?

	Concerned Consumers	All Consumers
The food has been prepared that day	43%	45%
The food has been delivered that day	27%	27%
The food has been has not been frozen	22%	20%
The food does not have any preservatives	5%	4%
Don't know	4%	4%

Which of these comes closest to your understanding when a restaurant in the UK states it is a community restaurant?

	Concerned Consumers	All Consumers
It employs people and sources products from the local community	37%	35%
It has close connections with the local community	27%	28%
It is a co-operative	9%	8%
It is a not-for-profit organisation	7%	7%
It donates money to the local community	6%	5%
Don't know	14%	18%



Which of these do you think best describes a 'sustainable' restaurant?

	Concerned Consumers	All Consumers
One that has a green/environmental approach	21%	22%
One that has locally sourced/free range/organic produce	17%	14%
One that is good to its staff and local community	7%	6%
One that is financially sound	6%	7%
One that has a healthy menu	5%	4%
One that shows aspects of all of the options above	33%	29%
Don't know	12%	19%

**Which celebrity chef do you think best represents 'sustainability' in relation to people and planet?**

	<b>Concerned Consumers</b>	<b>All Consumers</b>
Jamie Oliver	27%	26%
Another celebrity chef	9%	7%
Rick Stein	4%	4%
James Martin	4%	3%
Delia Smith	3%	3%
Valentine Warner	2%	2%
Marco Pierre White	2%	1%
Heston Blumenthal	2%	2%
Raymond Blanc	2%	2%
Gordon Ramsey	2%	2%
Michel Roux	1%	1%
Gary Rhodes	1%	1%
Tom Aikens	1%	1%
Jean Christophe Novelli	0%	1%
Albert Roux	0%	0%
Angela Hartnett	0%	0%
Don't know	40%	46%

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?

<b>Concerned Consumers</b>	<b>Aug-08</b>	<b>Sep-08</b>	<b>Oct-08</b>	<b>Nov-08</b>	<b>Dec-08</b>	<b>Jan-09</b>	<b>Feb-09</b>	<b>Mar-09</b>	<b>Apr-09</b>	<b>May-09</b>	<b>Jun-09</b>	<b>Jun-09</b>	<b>Jul-09</b>	<b>Nov-09</b>
<b>I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra</b>	55%	59%	56%	60%	60%	58%	59%	53%	59%	55%	50%	56%	50%	59%
<b>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</b>	45%	41%	44%	40%	40%	42%	41%	47%	41%	45%	50%	44%	50%	41%

<b>All Consumers</b>	<b>Nov-08</b>	<b>Dec-08</b>	<b>Jan-09</b>	<b>Feb-09</b>	<b>Mar-09</b>	<b>Apr-09</b>	<b>May-09</b>	<b>Jun-09</b>	<b>Jul-09</b>	<b>Sep-09</b>	<b>Nov-09</b>
<b>I would still try and buy the most ethical and environmentally-friendly products I could – even if it meant paying a little extra</b>	40%	44%	41%	45%	40%	42%	40%	35%	35%	42%	40%
<b>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</b>	60%	56%	59%	55%	60%	58%	60%	65%	65%	58%	60%