

CONCERNED CONSUMERS SUMMARY – APRIL 2009

Populus interviewed 1,025 adults aged 18+ online between 24th and 27th April 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=454)

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]

	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	<i>Change since last month</i>	<i>Change since last year</i>
Google	76	73	71	71	72	71	72	73	68	67	67	66	72	6	-4
Marks & Spencer	68	64	63	60	61	63	64	65	65	60	60	60	64	4	-4
Tesco	63	59	59	59	60	60	63	61	61	55	60	58	63	5	0
Virgin	55	54	54	55	58	58	57	59	57	56	55	53	59	6	+4
Apple	58	53	57	56	58	55	58	57	56	54	51	50	57	7	-1
Disney	57	57	51	51	55	52	55	55	52	49	51	47	55	8	-2
Ford	52	53	49	49	52	50	50	49	52	48	49	43	54	11	2
Vodafone	50	46	47	46	49	50	49	48	49	48	48	46	50	4	0
BT	49	46	47	48	51	46	51	50	45	45	43	47	49	2	0
Coca Cola	48	50	45	48	50	45	50	49	48	44	48	44	49	5	+1
HSBC	49	47	49	46	47	50	49	49	46	44	40	41	49	8	0
BP	46	41	40	40	43	41	44	45	43	42	44	41	48	7	+2
British Airways	40	39	40	43	42	41	45	47	43	46	43	42	46	4	+6
British Gas	42	40	37	39	39	37	42	42	40	39	39	41	44	3	+2
McDonald's	39	36	34	39	38	38	40	37	37	34	36	36	42	6	+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. [ALL CONSUMERS]

	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	<i>Change since last month</i>
Google	70	68	68	67	70	+3
Tesco	63	60	63	61	64	+3
M&S	64	60	59	59	61	+2
Virgin	56	57	56	54	58	+4
Disney	56	51	54	50	56	+6
Apple	55	53	52	49	55	+6
Ford	53	50	49	47	53	+6
Coca-Cola	52	48	51	48	52	+4
Vodafone	49	47	48	47	50	+3
BT	47	48	44	46	50	+4
BP	44	45	45	43	48	+5
HSBC	47	45	40	42	48	+6
BA	45	46	45	43	45	+2
McDonald's	43	40	40	40	45	+5
British Gas	40	40	40	41	45	+4

SECTOR FOCUS – AIRLINES, 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]

	Apr-07	Apr-08	Apr-09	<i>Change since last year</i>
Virgin	59	55	59	+4
Thomas Cook Airlines	-	-	49	-
easyJet	49	48	47	-1
Thomsonfly	-	44	47	+3
British Airways	45	40	46	+6
BMI	46	45	46	+1
Flybe	-	42	41	-1
Ryanair	44	41	39	-2

SECTOR FOCUS – AIRLINES. 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]

	Apr-09
Virgin	58
Thomas Cook Airlines	48
easyJet	47
Thomsonfly	46
BA	45
BMI	45
Flybe	40
Ryanair	39

Do you think airlines are doing enough to tackle social and environmental issues?

		Apr-08	Apr-09	Change
Concerned Consumers	Yes	19%	23%	+4%
	No	81%	77%	-4%

		Apr-09
All Consumers	Yes	27%
	No	73%

On a scale of 1 to 5, how well do you think each airline is doing at addressing social and environmental issues (e.g. working conditions, carbon footprint, use of resources etc)? (Where 1 means very poorly and 5 means very well indeed).

Concerned Consumers	Apr-08	Apr-09	Change since last year
Virgin	2.87	3.06	+0.19
BA	2.5	2.83	+0.33
Thomas Cook Airlines		2.73	-
BMI	2.54	2.70	+0.16
Thomsonfly	2.45	2.67	+0.22
easyJet	2.47	2.64	+0.17
Flybe	2.47	2.62	+0.15
Ryanair	2.34	2.50	+0.16

All Consumers	Apr-09
Virgin	3.05
BA	2.84
Thomas Cook Airlines	2.79
Thomsonfly	2.73
BMI	2.72
easyJet	2.69
Flybe	2.65
Ryanair	2.57

Which of the following do you think has the greatest impact on the environment? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
Regularly buying products that have been grown or manufactured abroad (e.g. food, drink, electronics etc)	34%	46%	41%	-5%
Driving your car for a year	30%	22%	28%	+6%
Flying to Europe twice a year	27%	23%	19%	-4%
Heating your home for a year	10%	10%	11%	+1%

Which of the following do you think has the greatest impact on the environment? [All Consumers]

	Apr-09
Regularly buying products that have been grown or manufactured abroad (e.g. food, drink, electronics etc)	40%
Driving your car for a year	27%
Flying to Europe twice a year	20%
Heating your home for a year	13%

Which of the following do you think bears the greatest responsibility for the environmental impact of flying?
 [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	<i>Change</i>
Airlines	35%	37%	38%	+1%
Government	18%	17%	19%	+2%
Aircraft makers	17%	25%	19%	-6%
Passengers	18%	13%	14%	+1%
Oil companies	13%	8%	10%	+2%

Which of the following do you think bears the greatest responsibility for the environmental impact of flying?
 [All Consumers]

	Apr-09
Airlines	37%
Government	20%
Aircraft makers	19%
Passengers	14%
Oil companies	10%

Do you think the airline industry as a whole takes the environmental impact of flying seriously or not? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
Yes	26%	27%	39%	+12%
No	74%	73%	61%	-12%

[All consumers]

	Apr-09
Yes	40%
No	60%

From what you have seen or heard about the following airlines, how far do you think each one of them is trying to minimise the environmental impact of flying on a scale of 1 to 5, where 1 means they are doing nothing at all and 5 means they are making every possible effort. [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
Virgin	3.02	2.88	3.03	+0.15
BA	2.58	2.56	2.88	+0.32
Thomas Cook Airlines			2.76	-
Thomsonfly	-	2.43	2.74	+0.31
BMI	2.42	2.56	2.71	+0.15
easyJet	2.37	2.46	2.67	+0.21
Flybe	-	2.45	2.64	+0.19
Ryanair	2.33	2.33	2.57	+0.24

[All Consumers]

	Apr-09
Virgin	3.03
BA	2.87
Thomas Cook Airlines	2.79
Thomsonfly	2.76
BMI	2.73
easyJet	2.70
Flybe	2.66
Ryanair	2.60

Which airline do you think is doing the most to minimise the environmental impact of flying? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
Virgin	62%	53%	55%	+2%
BA	20%	26%	23%	-3%
easyJet	6%	8%	7%	-1%
Thomas Cook Airlines			4%	+4%
Ryanair	6%	4%	4%	0%
Flybe	-	1%	3%	+2%
BMI	5%	6%	2%	-4%

[Concerned Consumers]

	Apr-09
Virgin	53%
BA	24%
easyJet	7%
Ryanair	5%
Thomas Cook Airlines	5%
BMI	2%
Flybe	2%

Older planes tend to emit more CO2 per passenger mile than newer planes. Do you think that after a certain age or period of service a plane should be grounded? [Concerned Consumers]

	Apr-08	Apr-09	Change
Yes	89%	84%	-5%
No	11%	16%	+5%

[All Consumers]

	Apr-09
Yes	81%
No	19%

When it comes to the phrase 'carbon offsetting', which of these statements comes closest to your view? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
I've heard of it and I know what it means	49%	49%	49%	0%
I've heard of it but I am unsure what it means	36%	41%	43%	+2%
I've never heard of the phrase	14%	10%	8%	-2%

[All Consumers]

	Apr-09
I've heard of it and I know what it means	45%
I've heard of it but I am unsure what it means	45%
I've never heard of the phrase	10%

'Carbon offsetting' is the name given to the idea that you can compensate for the carbon dioxide you put out into the atmosphere when you drive, fly, heat your home etc by funding projects that save an equivalent amount of carbon dioxide. Have you ever offset a flight you have taken? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
Yes	9%	14%	16%	+2%
No	91%	86%	84%	-2%

[All Consumers]

	Apr-09
Yes	11%
No	89%

Were you aware what projects the offset money was funding? [Concerned Consumers who had offset]

	Apr-08	Apr-09	Change
Yes	52%	55%	+3%
No	48%	45%	-3%

[All consumers who had offset]

	Apr-09
Yes	56%
No	44%

Which of the following best describes your view of carbon offsetting? [Concerned Consumers]

	Apr-07	Apr-08	Apr-09	Change
It is an effective way of addressing the problem of climate change	7%	7%	10%	+3%
It allows people to make a modest, personal contribution to the problem of climate change	41%	51%	44%	-7%
It is purely a gesture	44%	38%	41%	+3%
I don't know/care	9%	4%	5%	+1%

[All Consumers]

	Apr-09
It is an effective way of addressing the problem of climate change	8%
It allows people to make a modest, personal contribution to the problem of climate change	43%
It is purely a gesture	39%
I don't know/care	10%

In the coming year are you likely to: [Concerned Consumers]

	Apr-08	Apr-09	Change
Fly less	46%	38%	-8%
Choose the carrier with the cheapest flights	27%	30%	+3%
Make an effort to find out more about what different airlines are doing to address climate change	29%	24%	-5%
Continue to fly as much as last year	14%	21%	7%
Choose to fly with a carrier that has clear environmental policies to address its impact on the climate	23%	20%	-3%
Talk to friends and family about which airlines are doing most to address climate change	17%	16%	-1%
Carbon off-set flights	15%	15%	0%

[All consumers]

	Apr-09
Choose the carrier with the cheapest flights	+34%
Fly less	+33%
Continue to fly as much as last year	+25%
Make an effort to find out more about what different airlines are doing to address climate change	+19%
Choose to fly with a carrier that has clear environmental policies to address its impact on the climate	+16%
Talk to friends and family about which airlines are doing most to address climate change	+12%
Carbon off-set a flight(s)	+11%

All other things being equal, which of the following would you find most persuasive in choosing which airline to fly with? (Please rank these in order of importance – where 1 means that it is the most important, and 4 means that it is the least important.)
[Concerned Consumers]

		Apr-09
An airline that was actively investing in and testing cleaner alternative fuels that are more environmentally friendly	1	40%
	2	28%
	3	21%
	4	11%
An airline that made every possible effort to maximise the fuel efficiency of flights (only flying full flights, imposing weight restrictions etc)	1	24%
	2	30%
	3	26%
	4	20%
An airline that automatically carbon offset all flights	1	23%
	2	18%
	3	26%
	4	33%
An airline that offered discounts on products which help individuals minimise their carbon footprint (boiler insulation, hybrid cars etc)	1	18%
	2	19%
	3	27%
	4	35%

All other things being equal, which of the following would you find most persuasive in choosing which airline to fly with? (Please rank these in order of importance – where 1 means that it is the most important, and 4 means that it is the least important.) [All Consumers]

		Apr-09
An airline that was actively investing in and testing cleaner alternative fuels that are more environmentally friendly	1	36%
	2	29%
	3	21%
	4	14%
An airline that made every possible effort to maximise the fuel efficiency of flights (only flying full flights, imposing weight restrictions etc)	1	26%
	2	28%
	3	25%
	4	21%
An airline that automatically carbon offset all flights	1	23%
	2	21%
	3	26%
	4	30%
An airline that offered discounts on products which help individuals minimise their carbon footprint (boiler insulation, hybrid cars etc)	1	18%
	2	20%
	3	28%
	4	35%

The Government recently gave the go-ahead for a third runway to be built at Heathrow. Which of the following statements comes closest to your view on the expansion of Heathrow airport? [Concerned Consumers]

	Apr-09
I support the expansion of Britain's aviation capacity and support a third runway at Heathrow	33%
I support the expansion of Britain's aviation capacity but don't support a third runway at Heathrow	33%
I oppose the expansion of Britain's aviation capacity	34%

[All consumers]

	Apr-09
I support the expansion of Britain's aviation capacity and support a third runway at Heathrow	38%
I support the expansion of Britain's aviation capacity but don't support a third runway at Heathrow	31%
I oppose the expansion of Britain's aviation capacity	32%

Supporters of building a third runway at Heathrow say that it will provide a greater range of airlines, prices and destinations and that it will reduce congestion at London’s airports. Thinking of these claims, do you think would you reconsider your opposition to the third runway? [Asked only of those who opposed a third runway]

[Concerned Consumers]

	Apr-09
Yes, I would consider supporting a third runway in light of the promised economic benefits	15%
No, I would continue to oppose a third runway regardless of the promised economic benefits	64%
Don't know	21%

[All consumers]

	Apr-09
Yes, I would consider supporting a third runway in light of the promised economic benefits	15%
No, I would continue to oppose a third runway regardless of the promised economic benefits	60%
Don't know	24%

Opponents of building a third runway at Heathrow say that it will have a significantly bad impact on the environment, mostly through contributing to increased carbon emissions. Thinking of these claims, do you think you would reconsider your support for the third runway? [Asked only of those who supported a third runway]

[Concerned Consumers]

	Apr-09
Yes, I would consider opposing a third runway in light of the claimed environmental costs	26%
No, I would continue to support a third runway regardless of the claimed environmental costs	57%
Don't know	16%

[All consumers]

	Apr-09
Yes, I would consider opposing a third runway in light of the claimed environmental costs	18%
No, I would continue to support a third runway regardless of the claimed environmental costs	62%
Don't know	21%

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:

	Apr-07	Apr-08	Apr-09	Change
Fly less often	57%	58%	59%	+1%
Pay more to fly each time	13%	11%	9%	-2%
Neither	30%	30%	33%	+3%

[All consumers]

	Apr-09
Fly less often	52%
Pay more to fly each time	8%
Neither	40%

In addition to flying, airports themselves have a social and environmental impact. How important do you think it is for an airport operator to address each of the following? (On a scale of 1 to 5, where 1 means not important and 5 means very important)
[Concerned Consumers]

Treating employees fairly	4.18
Minimising safety and security risks	4.18
Providing a good customer experience	4.08
Reducing noise pollution	4.07
Reducing the environmental impact of the airport itself (excluding flying)	4.03
Managing airport expansion sensitively	4.03
Treating suppliers fairly	3.97
Reducing the environmental impact of transport to and from the airport	3.96
Supporting the local economy	3.92
Investing in the local community	3.88

[All Consumers]

Treating employees fairly	4.11
Minimising safety and security risks	4.09
Providing a good customer experience	4.07
Reducing noise pollution	4.02
Managing airport expansion sensitively	3.92
Reducing the environmental impact of the airport itself (excluding flying)	3.91
Supporting the local economy	3.87
Treating suppliers fairly	3.87
Reducing the environmental impact of transport to and from the airport	3.83
Investing in the local community	3.83

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	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-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%	58%	56%	55%	55%	59%	56%	60%	60%	58%	59%	53%	59%
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%	42%	44%	45%	45%	41%	44%	40%	40%	42%	41%	47%	41%

All Consumers	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-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%	45%	40%	42%
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%	55%	60%	58%