䋞Populus

## CONCERNED CONSUMERS SUMMARY - MAY 2009

Populus interviewed 1,043 adults aged $18+$ online between $15^{\text {th }}$ and $18^{\text {th }}$ May 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=471)

## 喿Populus

## 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]

|  | $\begin{gathered} \text { May- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Jun- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Jul- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Aug- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Sep- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Oct- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Nov- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Dec- } \\ 08 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Jan- } \\ 09 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Feb- } \\ 09 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Mar- } \\ 09 \\ \hline \end{gathered}$ | $\begin{gathered} \text { Apr- } \\ 09 \\ \hline \end{gathered}$ | May-09 | Change since last month | Change since last year |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Google | 73 | 71 | 71 | 72 | 71 | 72 | 73 | 68 | 67 | 67 | 66 | 72 | 71 | -1 | -2 |
| Marks \& Spencer | 64 | 63 | 60 | 61 | 63 | 64 | 65 | 65 | 60 | 60 | 60 | 64 | 63 | -1 | -1 |
| Tesco | 59 | 59 | 59 | 60 | 60 | 63 | 61 | 61 | 55 | 60 | 58 | 63 | 62 | -1 | 3 |
| Apple | 53 | 57 | 56 | 58 | 55 | 58 | 57 | 56 | 54 | 51 | 50 | 57 | 58 | 1 | 5 |
| Virgin | 54 | 54 | 55 | 58 | 58 | 57 | 59 | 57 | 56 | 55 | 53 | 59 | 57 | -2 | 3 |
| Disney | 57 | 51 | 51 | 55 | 52 | 55 | 55 | 52 | 49 | 51 | 47 | 55 | 55 | 0 | -2 |
| Ford | 53 | 49 | 49 | 52 | 50 | 50 | 49 | 52 | 48 | 49 | 43 | 54 | 53 | -1 | = |
| Vodafone | 46 | 47 | 46 | 49 | 50 | 49 | 48 | 49 | 48 | 48 | 46 | 50 | 50 | = | 4 |
| Coca Cola | 50 | 45 | 48 | 50 | 45 | 50 | 49 | 48 | 44 | 48 | 44 | 49 | 49 | = | -1 |
| BT | 46 | 47 | 48 | 51 | 46 | 51 | 50 | 45 | 45 | 43 | 47 | 49 | 49 | = | 3 |
| HSBC | 47 | 49 | 46 | 47 | 50 | 49 | 49 | 46 | 44 | 40 | 41 | 49 | 47 | -2 | $=$ |
| British Airways | 39 | 40 | 43 | 42 | 41 | 45 | 47 | 43 | 46 | 43 | 42 | 46 | 46 | = | 7 |
| BP | 41 | 40 | 40 | 43 | 41 | 44 | 45 | 43 | 42 | 44 | 41 | 48 | 46 | -2 | 5 |
| British Gas | 40 | 37 | 39 | 39 | 37 | 42 | 42 | 40 | 39 | 39 | 41 | 44 | 44 | = | 4 |
| McDonald's | 36 | 34 | 39 | 38 | 38 | 40 | 37 | 37 | 34 | 36 | 36 | 42 | 39 | -3 | 3 |

## 沀Populus

## 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 | May-09 | Change since <br> last month |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Google | 70 | 68 | 68 | 67 | 70 | 71 | 1 |
| Tesco | 63 | 60 | 63 | 61 | 64 | 64 | $=$ |
| M\&S | 64 | 60 | 59 | 59 | 61 | 62 | 1 |
| Disney | 56 | 51 | 54 | 50 | 56 | 57 | 1 |
| Virgin | 56 | 57 | 56 | 54 | 58 | 56 | -2 |
| Apple | 55 | 53 | 52 | 49 | 55 | 55 | $=$ |
| Ford | 53 | 50 | 49 | 47 | 53 | 53 | $=$ |
| Coca-Cola | 52 | 48 | 51 | 48 | 52 | 53 | 1 |
| Vodafone | 49 | 47 | 48 | 47 | 50 | 50 | $=$ |
| BT | 47 | 48 | 44 | 46 | 50 | 48 | -2 |
| HSBC | 47 | 45 | 40 | 42 | 48 | 46 | -2 |
| BP | 44 | 45 | 45 | 43 | 48 | 46 | -2 |
| British Gas | 40 | 40 | 40 | 41 | 45 | 45 | $=$ |
| BA | 45 | 46 | 45 | 43 | 45 | 45 | $=$ |
| McDonald's | 43 | 40 | 40 | 40 | 45 | 44 | -1 |

## 嵒Populus

## SECTOR FOCUS - MOBILE OPERATORS, 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]

|  | May-07 | May-08 | May-09 | Change |
| :--- | :---: | :---: | :---: | :---: |
| O2 | 51 | 47 | 54 | 7 |
| Orange | 48 | 48 | 50 | 2 |
| Vodafone | 46 | 46 | 50 | 4 |
| Virgin Mobile | 48 | 47 | 49 | 2 |
| T-Mobile | 44 | 45 | 48 | 3 |
| 3 | 39 | 38 | 41 | 3 |

## 嵒Populus

## SECTOR FOCUS - MOBILE OPERATORS. 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]

|  | May-09 |
| :--- | ---: |
| O2 | 54 |
| Orange | 51 |
| Vodafone | 50 |
| Virgin Mobile | 49 |
| T-Mobile | 48 |
| 3 | 41 |

## 䋞Populus

Do you think mobile phone operators are doing enough to tackle social and environmental issues?

|  |  | May-08 | May-09 | Change |
| :--- | :--- | :---: | :---: | :---: |
| Concerned Consumers | Yes | $19 \%$ | $20 \%$ | $1 \%$ |
|  | No | $81 \%$ | $80 \%$ | $-1 \%$ |


|  |  | May-09 |
| :--- | :--- | :---: |
| All Consumers | Yes | $27 \%$ |
|  | No | $73 \%$ |

## 踩Populus

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

Concerned Consumers

|  | May-08 | May-09 | Change since <br> last year |
| :--- | :---: | :---: | :---: |
| O2 | 2.7 | 2.89 | 0.19 |
| Virgin Mobile | 2.71 | 2.81 | 0.10 |
| Orange | 2.67 | 2.80 | 0.13 |
| Vodafone | 2.63 | 2.77 | 0.14 |
| T-Mobile | 2.55 | 2.73 | 0.18 |
| 3 | 2.4 | 2.62 | 0.22 |

All Consumers

|  | May-09 |
| :--- | :---: |
| O2 | 2.94 |
| Vodafone | 2.87 |
| Orange | 2.85 |
| Virgin Mobile | 2.84 |
| T-Mobile | 2.78 |
| 3 | 2.64 |

## 嵒Populus

If you had to choose, which of these do you think it is most important for mobile phone operators to address?

Concerned Consumers

| Environmental issues | $58 \%$ |
| :--- | :--- |
| Social issues | $42 \%$ |

All Consumers

| Environmental issues | $55 \%$ |
| :--- | :--- |
| Social issues | $45 \%$ |

## 䋞Populus

## How concerned or unconcerned are you about the following? [Concerned Consumers]

|  | \% Very Concerned May-07 | \% Very Concerned May-08 | \% Very Concerned May-09 | Change since last year |
| :---: | :---: | :---: | :---: | :---: |
| People driving whilst using their mobile phones | 81\% | 84\% | 77\% | -7\% |
| Children being bullied by text or over the phone | 63\% | 69\% | 59\% | -10\% |
| Children being exposed to inappropriate material on their mobile phone handset | 61\% | 63\% | 59\% | -4\% |
| Mis-selling through third-party retailers | - | - | 46\% | - |
| Roaming charges when calling to/from abroad | 48\% | 51\% | 39\% | -12\% |
| Possible health risks of living near mobile phone masts/base stations | 39\% | 37\% | 38\% | 1\% |
| The pricing structure of mobile phone contracts | 38\% | 46\% | 34\% | -12\% |
| Possible health risks of using mobile phones | 32\% | 25\% | 30\% | 5\% |
| The CO2 emissions associated with the manufacture and use of mobile phones | 31\% | 26\% | 30\% | 4\% |
| The appearance of mobile phone masts | 30\% | 28\% | 25\% | -3\% |
| Ability of disabled people to use mobile phone services | - | - | 25\% | - |
| Ability of disadvantaged people to access mobile phone services | - | - | 24\% | - |

## 嵒Populus

## All consumers

|  | \% Very Concerned <br> May-09 |
| :--- | :---: |
| People driving whilst using their mobile phones | $74 \%$ |
| Children being bullied by text or over the phone | $56 \%$ |
| Children being exposed to inappropriate material on their mobile phone handset | $55 \%$ |
| Mis-selling through third-party retailers | $40 \%$ |
| Roaming charges when calling to/from abroad | $37 \%$ |
| The pricing structure of mobile phone contracts | $32 \%$ |
| Possible health risks of living near mobile phone masts/base stations | $29 \%$ |
| Possible health risks of using mobile phones | $24 \%$ |
| The CO2 emissions associated with the manufacture and use of mobile phones | $22 \%$ |
| Ability of disabled people to use mobile phone services | $21 \%$ |
| The appearance of mobile phone masts | $20 \%$ |
| Ability of disadvantaged people to access mobile phone services | $19 \%$ |

## 丞Populus

How concerned or unconcerned are you about the following? [Concerned Consumers]

|  | \% Very/Quite Concerned May-07 | \% Very/Quite Concerned May-08 | \% Very/Quite Concerned May-09 | Change since last year |
| :---: | :---: | :---: | :---: | :---: |
| People driving whilst using their mobile phones | 94\% | 96\% | 96\% | $=$ |
| Children being bullied by text or over the phone | 91\% | 91\% | 88\% | -3\% |
| Children being exposed to inappropriate material on their mobile phone handset | 89\% | 88\% | 87\% | -1\% |
| Mis-selling through third-party retailers | - | - | 87\% | - |
| The CO2 emissions associated with the manufacture and use of mobile phones | 75\% | 73\% | 79\% | 6\% |
| The pricing structure of mobile phone contracts | 82\% | 80\% | 76\% | -4\% |
| Possible health risks of living near mobile phone masts/base stations | 78\% | 79\% | 74\% | -5\% |
| Ability of disabled people to use mobile phone services | - | - | 73\% | - |
| Roaming charges when calling to/from abroad | 75\% | 76\% | 72\% | -4\% |
| Possible health risks of using mobile phones | 72\% | 68\% | 69\% | 1\% |
| Ability of disadvantaged people to access mobile phone services | - | - | 68\% | - |
| The appearance of mobile phone masts | 64\% | 64\% | 58\% | -6\% |

## 喿Populus

## How concerned or unconcerned are you about the following? [All Consumers]

|  | \% Very/Quite Concerned <br> May-09 |
| :--- | :---: |
| People driving whilst using their mobile <br> phones | $94 \%$ |
| Children being bullied by text or over the <br> phone | $86 \%$ |
| Children being exposed to inappropriate <br> material on their mobile phone handset | $84 \%$ |
| Mis-selling through third-party retailers | $83 \%$ |
| The pricing structure of mobile phone <br> contracts | $75 \%$ |
| Roaming charges when calling to/from <br> abroad | $71 \%$ |
| Ability of disabled people to use mobile <br> phone services | $66 \%$ |
| Possible health risks of living near mobile <br> phone masts/base stations | $65 \%$ |
| The CO2 emissions associated with the <br> manufacture and use of mobile phones | $65 \%$ |
| Ability of disadvantaged people to access <br> mobile phone services | $63 \%$ |
| Possible health risks of using mobile phones | $60 \%$ |
| The appearance of mobile phone masts | $52 \%$ |

## 䋞Populus

Thinking about mobile phone usage overall, which of these issues would you say you are most concerned about? [Concerned Consumers]

|  | May-07 | May-08 | May-09 | Change since <br> last year |
| :--- | ---: | ---: | ---: | ---: |
| Health (e.g. potential risks of using, location of phone masts) | $26 \%$ | $26 \%$ | $32 \%$ | $6 \%$ |
| Children's safety (e.g. text bullying, theft, inappropriate content) | $41 \%$ | $38 \%$ | $32 \%$ | $-6 \%$ |
| Pricing (e.g. roaming) | $22 \%$ | $21 \%$ | $18 \%$ | $-3 \%$ |
| Environment (e.g. manufacturing process, disposal of handsets) | $11 \%$ | $15 \%$ | $18 \%$ | $3 \%$ |

## All consumers

|  | May-09 |
| :--- | ---: |
| Children's safety (e.g. text bullying, theft, inappropriate content) | $39 \%$ |
| Pricing (e.g. roaming) | $24 \%$ |
| Health (e.g. potential risks of using, location of phone masts) | $24 \%$ |
| Environment (e.g. manufacturing process, disposal of handsets) | $13 \%$ |

## 嵒Populus

How far do you think each of these mobile phone operators is trying to address the following issues, on a scale of 1 to 5 ? (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.)

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|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Environment | 2.54 | 2.47 | 2.66 | 0.19 |
| Pricing | 2.52 | 2.41 | 2.64 | 0.23 |
| Health | 2.48 | 2.34 | 2.62 | 0.28 |
| Children's safety | 2.45 | 2.42 | 2.59 | 0.17 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Environment | 2.71 |
| Pricing | 2.68 |
| Health | 2.66 |
| Children's safety | 2.63 |

## 嵒Populus

02

|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Pricing | 2.61 | 2.53 | 2.75 | 0.22 |
| Environment | 2.77 | 2.51 | 2.72 | 0.21 |
| Children's safety | 2.59 | 2.47 | 2.68 | 0.21 |
| Health | 2.57 | 2.47 | 2.65 | 0.18 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Pricing | 2.81 |
| Environment | 2.78 |
| Children's safety | 2.72 |
| Health | 2.71 |

## 嵒Populus

## Orange

|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Health | 2.52 | 2.46 | 2.66 | 0.20 |
| Children's safety | 2.56 | 2.47 | 2.62 | 0.15 |
| Pricing | 2.6 | 2.5 | 2.61 | 0.11 |
| Environment | 2.53 | 2.57 | 2.60 | 0.03 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Health | 2.72 |
| Environment | 2.71 |
| Pricing | 2.69 |
| Children's safety | 2.69 |

## 嵒Populus

T-Mobile

|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Environment | 2.41 | 2.46 | 2.61 | 0.15 |
| Pricing | 2.52 | 2.35 | 2.60 | 0.25 |
| Children's safety | 2.46 | 2.34 | 2.58 | 0.24 |
| Health | 2.43 | 2.35 | 2.57 | 0.22 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Environment | 2.71 |
| Pricing | 2.67 |
| Health | 2.67 |
| Children's safety | 2.66 |

## 嵒Populus

## Virgin Mobile

|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Environment | 2.59 | 2.6 | 2.70 | 0.10 |
| Children's safety | 2.57 | 2.48 | 2.70 | 0.22 |
| Pricing | 2.65 | 2.52 | 2.69 | 0.17 |
| Health | 2.56 | 2.47 | 2.67 | 0.20 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Pricing | 2.75 |
| Environment | 2.73 |
| Children's safety | 2.73 |
| Health | 2.71 |

## 嵒Populus

## Vodafone

|  | Concerned Consumers |  |  |  |
| :--- | :---: | :---: | :---: | :---: |
|  | May-07 | May-08 | May-09 | Change since <br> last year |
| Pricing | 2.51 | 2.39 | 2.72 | 0.33 |
| Environment | 2.51 | 2.47 | 2.63 | 0.16 |
| Children's safety | 2.52 | 2.42 | 2.61 | 0.19 |
| Health | 2.46 | 2.43 | 2.60 | 0.17 |


|  | All consumers |
| :--- | :---: |
|  | May-09 |
| Pricing | 2.81 |
| Environment | 2.73 |
| Children's safety | 2.70 |
| Health | 2.69 |

## 嵒Populus

Which of the following do you most trust to sell you the phone package which best suits your needs? [Concerned Consumers]

|  | May-07 | May-08 | May-09 | Change since <br> last year |
| :--- | :---: | :---: | :---: | :---: |
| O2 | $14 \%$ | $16 \%$ | $19 \%$ | $3 \%$ |
| Orange | $12 \%$ | $13 \%$ | $14 \%$ | $1 \%$ |
| Vodafone | $9 \%$ | $12 \%$ | $10 \%$ | $-2 \%$ |
| T-Mobile | $8 \%$ | $8 \%$ | $7 \%$ | $-1 \%$ |
| BT |  | $2 \%$ | $5 \%$ | $3 \%$ |
| Virgin Mobile | $9 \%$ | $11 \%$ | $4 \%$ | $-7 \%$ |
| Tesco | $3 \%$ | $3 \%$ | $4 \%$ | $1 \%$ |
| Carphone Warehouse | $7 \%$ | $4 \%$ | $4 \%$ | $0 \%$ |
| TalkTalk |  |  | $2 \%$ | $2 \%$ |
| 3 |  | $5 \%$ | $2 \%$ | $-3 \%$ |
| Phones4u | $2 \%$ | $1 \%$ | $0 \%$ | $-1 \%$ |
| The Link | $1 \%$ | $0 \%$ | $0 \%$ | $0 \%$ |
| All of them | $5 \%$ | $3 \%$ | $4 \%$ | $1 \%$ |
| None of them | $31 \%$ | $20 \%$ | $25 \%$ | $5 \%$ |

## 嵒Populus

Which of the following do you most trust to sell you the phone package which best suits your needs? [All consumers]

|  | May-09 |
| :--- | :---: |
| O2 | $18 \%$ |
| Orange | $13 \%$ |
| Vodafone | $12 \%$ |
| T-Mobile | $7 \%$ |
| Virgin Mobile | $5 \%$ |
| Carphone Warehouse | $4 \%$ |
| BT | $4 \%$ |
| Tesco | $4 \%$ |
| 3 | $3 \%$ |
| TalkTalk | $3 \%$ |
| Phones4u | $1 \%$ |
| The Link | $0 \%$ |
| All of them | $4 \%$ |
| None of them | $22 \%$ |

## 嵒Populus

Do you own a mobile phone?

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Yes | $97 \%$ | $96 \%$ |
| No | $3 \%$ | $4 \%$ |

Who is your network provider? [Asked only of those with a mobile]

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| O2 | $29 \%$ | $27 \%$ |
| Orange | $23 \%$ | $23 \%$ |
| Vodafone | $16 \%$ | $19 \%$ |
| T-Mobile | $13 \%$ | $11 \%$ |
| Virgin Mobile | $9 \%$ | $8 \%$ |
| Other | $6 \%$ | $5 \%$ |
| 3 | $5 \%$ | $8 \%$ |
| Don't know | $0 \%$ | $0 \%$ |

## 風Populus

Have you upgraded your phone in the last 12 months? [Asked only of those with a mobile]

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Yes | $41 \%$ | $41 \%$ |
| No | $59 \%$ | $59 \%$ |

When you upgraded your phone what did you do with your old phone? [Asked only of those who have upgraded]

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Kept it | $35 \%$ | $41 \%$ |
| Gave it to a <br> friend/family/colleague | $29 \%$ | $27 \%$ |
| Sent it to be recycled | $29 \%$ | $24 \%$ |
| Traded it in at a retailer | $6 \%$ | $6 \%$ |
| Threw it away | $0 \%$ | $1 \%$ |
| Don't know | $0 \%$ | $2 \%$ |

## 風Populus

Which of the following do you think offers the most environmentally friendly handset? [Concerned Consumers]

|  | May-07 | May-08 | May-09 | Change since last year |
| :--- | :---: | :---: | :---: | :---: |
| Nokia | $17 \%$ | $10 \%$ | $13 \%$ | $3 \%$ |
| Sony Ericsson | $6 \%$ | $4 \%$ | $5 \%$ | $1 \%$ |
| Samsung | $3 \%$ | $5 \%$ | $5 \%$ | $0 \%$ |
| Blackberry |  | $0 \%$ | $3 \%$ | $3 \%$ |
| LG | $1 \%$ | $2 \%$ | $2 \%$ | $0 \%$ |
| Apple |  | $1 \%$ | $2 \%$ | $1 \%$ |
| Motorola | $4 \%$ | $2 \%$ | $1 \%$ | $-1 \%$ |
| Sagem | $0 \%$ | $0 \%$ | $0 \%$ | $0 \%$ |
| Don't know | $68 \%$ | $75 \%$ | $69 \%$ | $-6 \%$ |

## 䋞Populus

## All consumers

|  | May-09 |
| :--- | :---: |
| Nokia | $15 \%$ |
| Sony Ericsson | $6 \%$ |
| Samsung | $5 \%$ |
| Apple | $2 \%$ |
| Motorola | $2 \%$ |
| LG | $2 \%$ |
| Blackberry | $1 \%$ |
| Sagem | $0 \%$ |
| I don't know | $66 \%$ |

## 嵒Populus

At what age should children be allowed to have their own mobile phone? [Concerned Consumers]

|  | May-07 | May-08 | May-09 | Change |
| :--- | :---: | :---: | :---: | :---: |
| Under 6 | $0 \%$ | $0 \%$ | $1 \%$ | $1 \%$ |
| $6-8$ | $3 \%$ | $3 \%$ | $3 \%$ | $0 \%$ |
| $8-10$ | $7 \%$ | $10 \%$ | $11 \%$ | $1 \%$ |
| $10-12$ | $26 \%$ | $19 \%$ | $28 \%$ | $9 \%$ |
| 12 and over | $64 \%$ | $68 \%$ | $56 \%$ | $-12 \%$ |

At what age should children be allowed to have their own mobile phone? [All Consumers]

|  | May-09 |
| :--- | :---: |
| Under 6 | $1 \%$ |
| $6-8$ | $3 \%$ |
| $8-10$ | $10 \%$ |
| $10-12$ | $27 \%$ |
| 12 and over | $59 \%$ |

## 風Populus

What might stop you giving a child a mobile phone? (Please tick all that apply) [Concerned Consumers]

|  | May-07 | May-08 | May-09 | Change since <br> last year |
| :--- | ---: | ---: | ---: | ---: |
| Crime issues (e.g. bullying, theft) | $69 \%$ | $79 \%$ | $77 \%$ | $-2 \%$ |
| Access to adult material | $45 \%$ | $56 \%$ | $59 \%$ | $3 \%$ |
| Health issues (e.g. risk of radiation) | $45 \%$ | $57 \%$ | $56 \%$ | $-1 \%$ |
| Them growing up too fast | $33 \%$ | $44 \%$ | $40 \%$ | $-4 \%$ |

What might stop you giving a child a mobile phone? (Please tick all that apply) [All Consumers]

|  | May-09 |
| :--- | :---: |
| Crime issues (e.g. bullying, theft) | $77 \%$ |
| Access to adult material | $57 \%$ |
| Health issues (e.g. risk of radiation) | $46 \%$ |
| Them growing up too fast | $40 \%$ |

## 喿Populus

Excluding the costs of handsets and accessories, how much on average do you spend per month on your mobile phone? [Concerned Consumers]

|  | May-08 | May-09 | Change since <br> last year |
| :--- | :---: | :---: | :---: |
| Less than $£ 15$ | $59 \%$ | $54 \%$ | $-5 \%$ |
| $£ 16-£ 30$ | $22 \%$ | $31 \%$ | $9 \%$ |
| $£ 31-£ 45$ | $15 \%$ | $11 \%$ | $-4 \%$ |
| $£ 46-£ 60$ | $2 \%$ | $2 \%$ | $0 \%$ |
| More than $£ 61$ | $2 \%$ | $2 \%$ | $0 \%$ |

All consumers

|  | May-09 |
| :--- | :---: |
| Less than $£ 15$ | $57 \%$ |
| $£ 16-£ 30$ | $28 \%$ |
| $£ 31-£ 45$ | $12 \%$ |
| $£ 46-£ 60$ | $2 \%$ |
| More than $£ 61$ | $1 \%$ |

## 嵒Populus

Have you cut back the amount you spend on your mobile phone as a result of the current economic climate?

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Yes | $33 \%$ | $29 \%$ |
| No | $64 \%$ | $67 \%$ |
| Don't know | $3 \%$ | $3 \%$ |

Which of the following would you do to get a 'greener' product?

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Go out of your way (e.g. go to a shop <br> that's further away than your usual shop) | $37 \%$ | $27 \%$ |
| Wait for it (e.g. have to order it and wait <br> for it to be delivered) | $40 \%$ | $32 \%$ |
| Pay more for it | $30 \%$ | $22 \%$ |
| Accept a slightly inferior product | $15 \%$ | $14 \%$ |
| None of the above | $26 \%$ | $38 \%$ |

## 嵒Populus

What level of price premium are you prepared to pay to get a 'greener' product or service?

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Would expect to pay less for a 'green' product | $11 \%$ | $13 \%$ |
| Not prepared to pay a premium | $41 \%$ | $49 \%$ |
| $10 \%$; premium or less (e.g. $£ 1.05$ instead of $£ 1$ ) | $39 \%$ | $30 \%$ |
| Between $10 \%$ and $50 \%$ premium (e.g. $£ 1.50$ <br> instead of $£ 1$ ) | $8 \%$ | $7 \%$ |
| $100 \%$ premium or more (e.g. $£ 2.00$ instead of $£ 1$ ) | $1 \%$ | $1 \%$ |

Are you aware of any green/environmental initiatives currently being run by the following companies? [Those saying 'Yes']

|  | Concerned Consumers | All consumers |
| :--- | :---: | :---: |
| Nokia | $9 \%$ | $9 \%$ |
| Sony | $7 \%$ | $7 \%$ |
| GE | $7 \%$ | $6 \%$ |
| Samsung | $6 \%$ | $6 \%$ |
| Sony Ericsson | $6 \%$ | $7 \%$ |
| Panasonic | $5 \%$ | $6 \%$ |
| Sharp | $3 \%$ | $4 \%$ |
| Motorola | $3 \%$ | $4 \%$ |

## 喿Populus

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 | May- <br> 08 | Jun- <br> 08 | Jul- <br> 08 | Aug- <br> 08 | Sep- <br> 08 | Oct- <br> 08 | Nov- <br> 08 | Dec- <br> 08 | Jan- <br> 09 | Feb- <br> 09 | Mar- <br> 09 | Apr- <br> 09 | May- <br> 09 |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: | ---: |
| I would still try and buy the most ethical and <br> environmentally-friendly products I could - even if it <br> meant paying a little extra | $58 \%$ | $56 \%$ | $55 \%$ | $55 \%$ | $59 \%$ | $56 \%$ | $60 \%$ | $60 \%$ | $58 \%$ | $59 \%$ | $53 \%$ | $59 \%$ | $55 \%$ |
| I would be more likely to buy products and services <br> that represented the best value for money regardless <br> of the company's ethical or environmental credentials | $42 \%$ | $44 \%$ | $45 \%$ | $45 \%$ | $41 \%$ | $44 \%$ | $40 \%$ | $40 \%$ | $42 \%$ | $41 \%$ | $47 \%$ | $41 \%$ | $45 \%$ |


| All Consumers | Nov-08 | Dec-08 | Jan-09 | Feb-09 | Mar-09 | Apr-09 | May-09 |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| I would still try and buy the most ethical and <br> environmentally-friendly products I could - even if it meant <br> paying a little extra | $40 \%$ | $44 \%$ | $41 \%$ | $45 \%$ | $40 \%$ | $42 \%$ | $40 \%$ |
| I would be more likely to buy products and services that <br> represented the best value for money regardless of the <br> company's ethical or environmental credentials | $60 \%$ | $56 \%$ | $59 \%$ | $55 \%$ | $60 \%$ | $58 \%$ | $60 \%$ |

