

CONCERNED CONSUMERS SUMMARY – MAY 2009

Populus interviewed 1,043 adults aged 18+ online between 15th and 18th 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)

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-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	<i>Change since last month</i>	<i>Change since last year</i>
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

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	<i>Change since last month</i>
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

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

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

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%

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 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

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%

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%	-

All consumers

	% Very Concerned 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%

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%

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

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

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 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%

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 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

	Concerned Consumers			
	May-07	May-08	May-09	Change since 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

Orange

	Concerned Consumers			
	May-07	May-08	May-09	Change since 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

T-Mobile

	Concerned Consumers			
	May-07	May-08	May-09	Change since 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

Virgin Mobile

	Concerned Consumers			
	May-07	May-08	May-09	Change since 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

Vodafone

	Concerned Consumers			
	May-07	May-08	May-09	Change since 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

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 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%

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%

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%

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 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%

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%

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%

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%

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 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%

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 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%

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 that's further away than your usual shop)	37%	27%
Wait for it (e.g. have to order it and wait 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%

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 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%

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-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09
I would still try and buy the most ethical and environmentally-friendly products I could – even if it 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 that represented the best value for money regardless 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 environmentally-friendly products I could – even if it meant paying a little extra	40%	44%	41%	45%	40%	42%	40%
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%	60%