

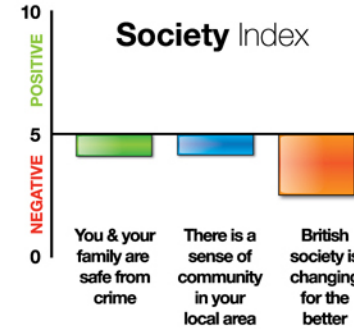
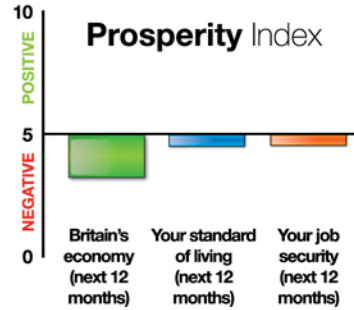
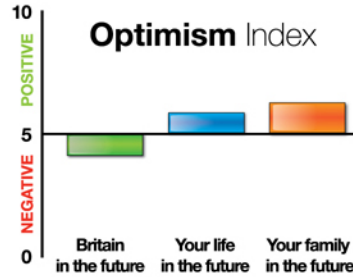
Reasons for optimism (spontaneous)

1. Job / career opportunities 29%
2. Family / relationship situation 26%
3. Economic situation improving 10%

Reasons for pessimism (spontaneous)

1. Weak economy / credit crunch 35%
2. Banking / Stock Market crisis 19%
3. G. Brown / Labour government 8%

Consumers were asked to rate the outlook for... (positive/negative on a scale of 0-10)



NATIONALMOOD

Top 5 most significant events in media / business / politics

1. Banking crisis / stock market crash 37%
2. Worsening economic situation / credit crunch 25%
3. G. Brown / The Government (negative) 16%
4. Rising cost of living / fuel / food 13%
5. Crime 7%

ANTENNA

Do you think that life in Britain has got better or worse over the last month?



CONSUMERMOOD

TOP ISSUES
(Consumers have talked, thought or worried about)

TOP BRANDS
(Most commonly associated with each issue)

TOP 5 BEHAVIOUR CHANGES
(Spontaneously reported behavioural changes)

| HEALTH | | ECONOMY | | ENVIRONMENT | |
|-----------------------------------------|---------------------------------|-----------------------------------|---------------------------|-------------------------------------------|--------------------|
| 1. Food costs 60% | 2. Exercise 52% | 3. Five a day 42% | 4. Balanced diet 39% | 5. Reducing fat 30% | |
| 1. Food costs 81% | 2. Cost of fuel 76% | 3. Cost of utilities 76% | 4. Banking crisis 57% | 5. Wages / Inflation 40% | |
| 1. Recycling 58% | 2. Switching off 53% | 3. Plastic bags 50% | 4. Flooding/Disasters 44% | 5. Climate change 39% | |
| POSITIVE | NEGATIVE | POSITIVE | NEGATIVE | POSITIVE | NEGATIVE |
| 1. TESCO | 1. McDonald's | 1. TESCO | 1. BRITISH AIRWAYS | 1. TESCO | 1. BRITISH AIRWAYS |
| 2. Sainsbury's | 2. KFC | 2. ASDA | 2. TESCO | 2. ASDA | 2. McDonald's |
| 3. ASDA | 3. Coca-Cola | 3. Sainsbury's | 3. EUROSTAR | 3. Sainsbury's | 3. TESCO |
| 4. Birds Eye | 4. Pizza Hut | 4. BT | 4. McDonald's | 4. McDonald's | 4. KFC |
| 5. McDonald's | 5. TESCO | 5. BRITISH AIRWAYS | 5. ASDA | 5. Coca-Cola | 5. ASDA |
| 6. WALKERS | 6. PERSI | 6. sky | 6. Sainsbury's | 6. WALKERS | 6. BT |
| 1. More fruit & veg 44% | 2. More exercise 10% | 3. Comparing prices 9% | 4. Less salt/sugar 7% | 5. Checking food labels more carefully 7% | |
| 1. Budgeting 25% | 2. Using car less 15% | 3. Cutting back on energy use 12% | 4. Going out less 10% | 5. Promotions & BOGOFs 8% | |
| 1. Using car less (cycling/walking) 29% | 2. Switching off appliances 20% | 3. Recycling more 19% | 4. Re-using bags 9% | 5. Low energy light bulbs 6% | |

ZEITGEIST

Zeitgeist Index: 4.40

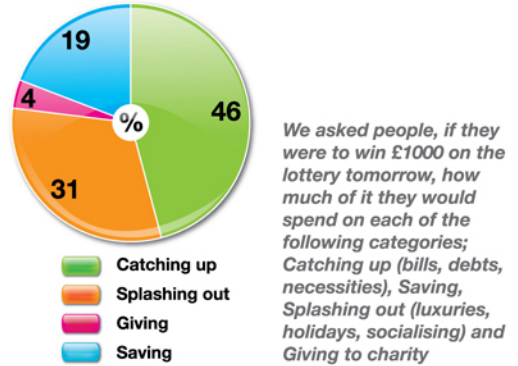
The Zeitgeist index is a holistic view of the nation's mood calculated by combining the four indices:

- Optimism
- Prosperity
- Society
- Well being

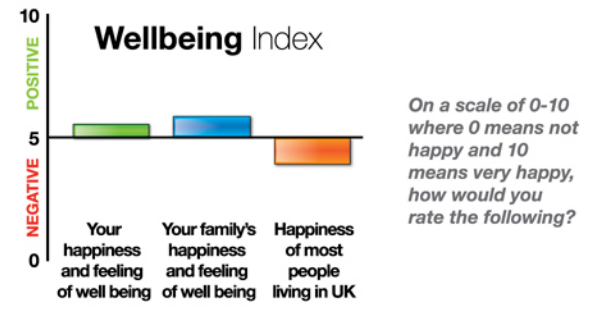
A monthly snapshot of the state of the nation brought to you by:

freud | Populus

FINANCIALMOOD

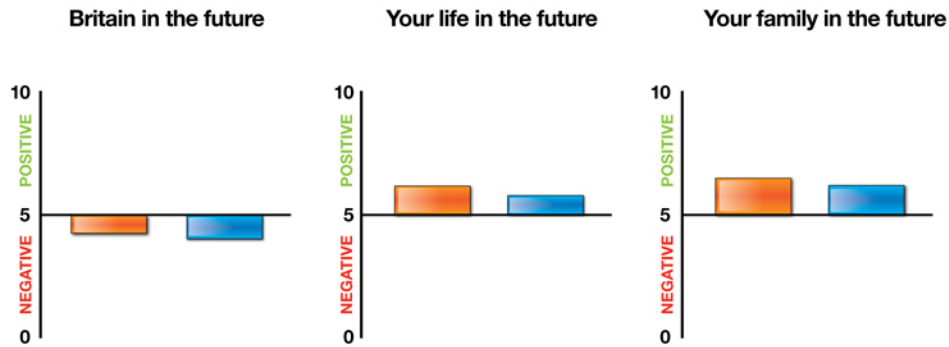


INNERMOOD



Top 5 most significant family events in the last month

1. Rising prices / more debts / less money 41%
2. Personal / family health issue (neg) 12%
3. Celebration (new baby / wedding etc) 11%
4. Positive job related news 8%
5. Negative job related news 7%



OPTIMISM INDEX



PROSPERITY INDEX

ZEITGEIST

Time Series Data

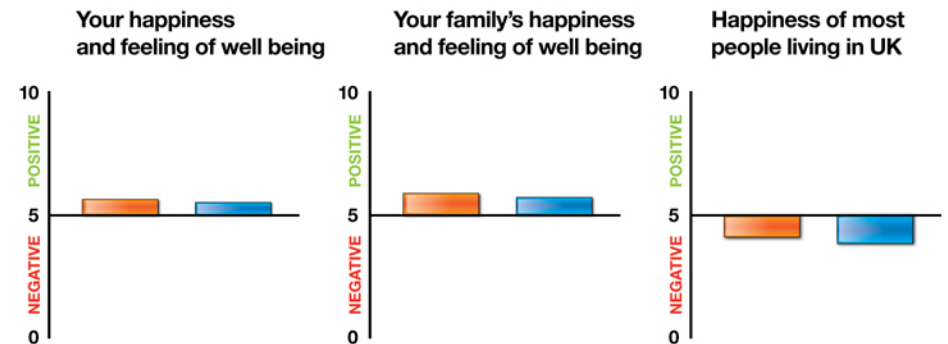
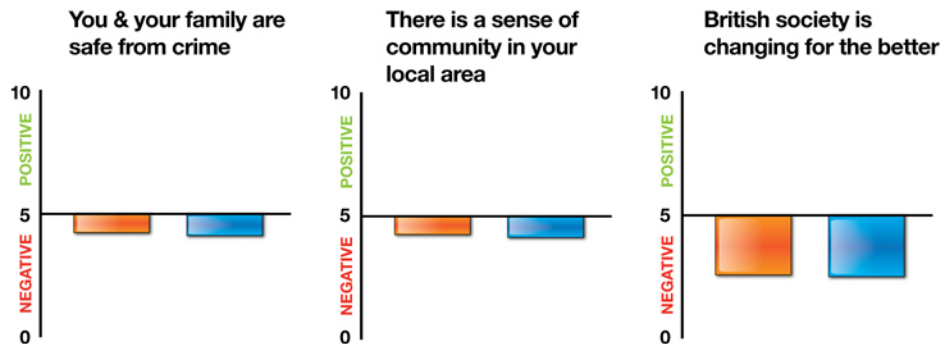
AUGUST SEPTEMBER

A monthly snapshot of the state of the nation brought to you by:

freud Populus

SOCIETY INDEX

WELLBEING INDEX



METHODOLOGY

Populus interviewed 1,063 adults aged 18+ online between 19th and 22nd September 2008. 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