

CONCERNED CONSUMERS SUMMARY – JUNE 2009

Populus interviewed 1,105 adults aged 18+ online between 19th and 22nd June 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=476)

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]

	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-09	<i>Change since last month</i>	<i>Change since last year</i>
Google	71	71	72	71	72	73	68	67	67	66	72	71	72	+1	+1
Marks & Spencer	63	60	61	63	64	65	65	60	60	60	64	63	65	+2	+2
Tesco	59	59	60	60	63	61	61	55	60	58	63	62	62	0	+3
Virgin	54	55	58	58	57	59	57	56	55	53	59	57	59	+2	+5
Apple	57	56	58	55	58	57	56	54	51	50	57	58	59	+1	+2
Disney	51	51	55	52	55	55	52	49	51	47	55	55	55	0	+4
Ford	49	49	52	50	50	49	52	48	49	43	54	53	55	+2	+6
BT	47	48	51	46	51	50	45	45	43	47	49	49	53	+4	+6
Vodafone	47	46	49	50	49	48	49	48	48	46	50	50	52	+2	+5
Coca Cola	45	48	50	45	50	49	48	44	48	44	49	49	50	+1	+5
BP	40	40	43	41	44	45	43	42	44	41	48	46	47	+1	+7
HSBC	49	46	47	50	49	49	46	44	40	41	49	47	46	-1	-3
British Gas	37	39	39	37	42	42	40	39	39	41	44	44	46	2	+9
British Airways	40	43	42	41	45	47	43	46	43	42	46	46	44	-2	+4
McDonald's	34	39	38	38	40	37	37	34	36	36	42	39	41	2	+7

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	Jun-09	<i>Change since last month</i>
Google	70	68	68	67	70	71	72	+1
Tesco	63	60	63	61	64	64	64	0
M&S	64	60	59	59	61	62	64	+2
Virgin	56	57	56	54	58	56	59	+3
Apple	55	53	52	49	55	55	58	+3
Disney	56	51	54	50	56	57	58	+1
Ford	53	50	49	47	53	53	54	+1
Coca-Cola	52	48	51	48	52	53	53	0
BT	47	48	44	46	50	48	53	+5
Vodafone	49	47	48	47	50	50	52	+2
BP	44	45	45	43	48	46	49	+3
HSBC	47	45	40	42	48	46	48	+2
British Gas	40	40	40	41	45	45	47	+2
BA	45	46	45	43	45	45	46	+1
McDonald's	43	40	40	40	45	44	44	0

SECTOR FOCUS – CAR MANUFACTURERS, 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]

	Jun-07	Jun-08	Jun-09	Change
Honda	57	56	58	+2
Audi	54	50	56	+6
Volkswagen	56	51	56	+5
Ford	52	49	55	+6
Toyota	53	51	55	+4
BMW	53	49	54	+5
Mercedes-Benz	N/A	49	54	+5
Vauxhall	52	50	52	+2
Peugeot	49	49	51	+2
Citroën	46	46	48	+2
Fiat	N/A	42	46	+4
Renault	48	44	46	+2

SECTOR FOCUS – CAR MANUFACTURERS. 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]

	Jun-09
Honda	57
Audi	55
Mercedes-Benz	54
BMW	54
Volkswagen	54
Ford	54
Toyota	54
Vauxhall	52
Peugeot	51
Citroën	48
Renault	46
Fiat	45

If you had to choose, which of these do you think it is most important for car manufacturers to address?

		Jun-09
Concerned Consumers	Social issues	18%
	Environmental issues	82%

		Jun-09
All Consumers	Social issues	23%
	Environmental issues	77%

Do you think car manufacturers are doing enough to address social and environmental issues?

		Jun-09
Concerned Consumers	Yes	19%
	No	81%

		Jun-09
All Consumers	Yes	27%
	No	73%

Do you think car manufacturers as a whole take the environmental impact of driving seriously or not?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
Yes	34%	36%	36%	0%
No	66%	64%	64%	0%

All Consumers

	Jun-09
Yes	39%
No	61%

Which car manufacturer do you think is doing the most to minimise the environmental impact of driving?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
Honda	22%	26%	26%	0%
Toyota	24%	19%	21%	+2%
Ford	12%	8%	9%	+1%
Audi	5%	4%	7%	+3%
Volkswagen	11%	7%	7%	0%
Fiat	N/A	2%	5%	+3%
Renault	4%	4%	4%	0%
BMW	7%	8%	4%	-4%
Vauxhall	4%	6%	4%	-2%
Peugeot	4%	5%	4%	-1%
Citroen	6%	4%	4%	0%
Mercedes	N/A	7%	3%	-4%

Which car manufacturer do you think is doing the most to minimise the environmental impact of driving?

All Consumers

	Jun-09
Honda	25%
Toyota	21%
Ford	11%
Volkswagen	6%
Audi	6%
BMW	6%
Citroën	5%
Vauxhall	5%
Fiat	4%
Renault	4%
Peugeot	4%
Mercedes	3%

If a car manufacturer promised to make the first 45,000 miles driven in a new car carbon neutral, which of the following statements would come closest to your views?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
It's an attractive proposition which would make me think differently about the car in question	52%	43%	46%	+3%
It's a minor but none the less commendable gesture	35%	39%	40%	+1%
It's a pointless gimmick that I find annoying	13%	18%	15%	-3%

All Consumers

	Jun-09
It's an attractive proposition which would make me think differently about the car in question	41%
It's a minor but none the less commendable gesture	42%
It's a pointless gimmick that I find annoying	18%

What is likely to be the most important factor influencing your choice of car in the future?

Concerned Consumers

	Jun-08	Jun-09	Change
Price	36%	41%	+5%
Environmental credentials (e.g. CO2 emissions, hybrid engine)	25%	28%	+3%
Practical requirements (e.g. 4x4, boot space, seats)	19%	16%	-3%
Performance (e.g. engine size, speed)	5%	5%	0%
Brand	4%	4%	0%
Appearance (e.g. colour, style)	3%	4%	+1%
Features (e.g. air-conditioning, power-steering)	7%	2%	-5%

What is likely to be the most important factor influencing your choice of car in the future?

All Consumers

	Jun-09
Price	46%
Environmental credentials (e.g. CO2 emissions, hybrid engine)	21%
Practical requirements (e.g. 4x4, boot space, seats)	16%
Appearance (e.g. colour, style)	5%
Performance (e.g. engine size, speed)	5%
Brand	4%
Features (e.g. air-conditioning, power-steering)	3%

If you had to choose between one of the following, which kind of car would you prefer to buy?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
A fuel-efficient petrol car	31%	35%	33%	-2%
A hybrid car	26%	34%	33%	-1%
A diesel car	21%	12%	14%	+2%
An electric car	14%	11%	12%	+1%
An LPG-powered car	9%	7%	7%	0%

All Consumers

	Jun-09
A fuel-efficient petrol car	37%
A hybrid car	27%
A diesel car	18%
An electric car	11%
An LPG-powered car	8%

Thinking about the future which of the following do you think you will be driving in ten years' time?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
I probably won't have a car	27%	29%	25%	-4%
Hybrid	21%	29%	25%	-4%
A petrol car	13%	11%	14%	+3%
A hydrogen car	11%	9%	13%	+4%
An electric car	10%	8%	10%	+2%
A diesel car	12%	8%	9%	1%
An LPG-powered car	7%	6%	4%	-2%

All Consumers

	Jun-09
I probably won't have a car	25%
Hybrid	22%
A petrol car	17%
A hydrogen car	10%
A diesel car	10%
An electric car	9%
An LPG-powered car	5%

Over the last year have you cut the amount of trips you make by car?

Concerned Consumers

	Jun-08	Jun-09	Change
Yes	69%	69%	0%
No	31%	31%	0%

All Consumers

	Jun-09
Yes	69%
No	31%

What was the main reason for this reduction?

Concerned Consumers

	Jun-08	Jun-09	Change
Cost	47%	35%	-12%
Change in lifestyle	30%	34%	+4%
Environmental concerns	13%	14%	+1%
Other	6%	10%	+4%
Better public transport	3%	7%	+4%

All Consumers

	Jun-09
Cost	38%
Change in lifestyle	36%
Environmental concerns	10%
Other	9%
Better public transport	7%

What types of car journeys are you no longer taking? Please tick all that apply [Asked only of those taking fewer car journeys]

Concerned Consumers

	Jun-08	Jun-09	Change
Trips to out-of-town retail parks	42%	52%	<i>+10%</i>
Local shopping trips	45%	43%	<i>-2%</i>
Weekend breaks in the UK	39%	40%	<i>+1%</i>
Trips abroad	32%	33%	<i>+1%</i>
Business trips	32%	32%	<i>=</i>
Visiting friends and family	35%	32%	<i>-3%</i>
Trips to school	34%	30%	<i>-4%</i>

All Consumers

	Jun-09
Local shopping trips	46%
Trips to out-of-town retail parks	45%
Weekend breaks in the UK	40%
Visiting friends and family	33%
Trips abroad	32%
Trips to school	32%
Business trips	32%

Who do you think should take responsibility for the safe disposal of vehicles when they reach the end of their life cycle?

Concerned Consumers

	Jun-07	Jun-08	Jun-09	Change
The car manufacturer	43%	40%	42%	2%
The individual car owner	34%	40%	30%	-10%
The government	23%	20%	28%	8%

All Consumers

	Jun-09
The car manufacturer	36%
The individual car owner	35%
The government	28%

The government recently announced a Car Scrappage Scheme, which offers people £2,000 towards a new car if they trade in a car or van at least 10 years old. Were you aware of this scheme?

Concerned Consumers	Yes	90%
	No	10%

Total	Yes	91%
	No	9%

Have you used the scheme? [Asked only of those who have heard of the scheme]

Concerned Consumers	Yes	1%
	No	99%

Total	Yes	1%
	No	99%

Over the past year the Government has agreed to provide public funding to rescue a number of banks in the UK which were in trouble, helping to protect the financial sector. Do you think the Government should provide public funding to rescue car manufacturers which are in trouble in order to help protect the automotive sector?

Concerned Consumers	Yes	42%
	No	39%
	Don't know	19%

Total	Yes	39%
	No	39%
	Don't know	22%

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

All Consumers	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09	Jun-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%	35%
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%	65%

And over the next 12 months do you expect to do these things...

		Total	Total Combined	Concerned	Concerned Combined
Buy luxury food	A lot less	32%	Less: 62%	34%	Less: 67%
	A little less	30%		33%	
	About the same as usual	36%		29%	
	A little more	2%	More: 3%	3%	More: 4%
	A lot more	0%		1%	
Make major purchases	A lot less	33%	Less: 59%	33%	Less: 62%
	A little less	26%		29%	
	About the same as usual	36%		34%	
	A little more	4%	More: 5%	3%	More: 4%
	A lot more	1%		1%	
Put money into investments	A lot less	35%	Less: 52%	36%	Less: 52%
	A little less	17%		16%	
	About the same as usual	39%		38%	
	A little more	6%	More: 9%	8%	More: 10%
	A lot more	2%		2%	
Borrow money	A lot less	39%	Less: 52%	38%	Less: 51%
	A little less	12%		13%	
	About the same as usual	39%		39%	
	A little more	7%	More: 9%	8%	More: 10%
	A lot more	2%		2%	

		Total	Total Combined	Concerned	Concerned Combined
Buy new household appliances	A lot less	22%	Less: 48%	20%	Less: 49%
	A little less	26%		29%	
	About the same as usual	46%		46%	
	A little more	5%	More: 6%	4%	More: 5%
	A lot more	1%		1%	
Take a holiday abroad	A lot less	31%	Less: 48%	32%	Less: 48%
	A little less	17%		17%	
	About the same as usual	42%		42%	
	A little more	8%	More: 10%	7%	More: 10%
	A lot more	3%		3%	
Put money in savings	A lot less	22%	Less: 41%	23%	Less: 40%
	A little less	19%		17%	
	About the same as usual	39%		38%	
	A little more	16%	More: 21%	17%	More: 22%
	A lot more	4%		4%	
Drive	A lot less	18%	Less: 41%	19%	Less: 43%
	A little less	23%		25%	
	About the same as usual	51%		48%	
	A little more	6%	More: 8%	7%	More: 9%
	A lot more	2%		3%	

		Total	Total Combined	Concerned	Concerned Combined
Go out to relax / socialise	A lot less	15%	Less: 40%	14%	Less: 41%
	A little less	25%		27%	
	About the same as usual	48%		48%	
	A little more	9%	More: 12%	8%	More: 11%
	A lot more	3%		4%	
Take money out of investments	A lot less	22%	Less: 34%	21%	Less: 33%
	A little less	12%		12%	
	About the same as usual	53%		52%	
	A little more	10%	More: 14%	11%	More: 15%
	A lot more	4%		4%	
Take money out of savings	A lot less	16%	Less: 28%	15%	Less: 27%
	A little less	13%		12%	
	About the same as usual	47%		49%	
	A little more	18%	More: 24%	17%	More: 24%
	A lot more	6%		7%	
Take a holiday in the UK	A lot less	14%	Less: 27%	14%	Less: 28%
	A little less	12%		13%	
	About the same as usual	51%		48%	
	A little more	17%	More: 22%	19%	More: 25%
	A lot more	5%		6%	

		Total	Total Combined	Concerned	Concerned Combined
Pay off debt	A lot less	10%	Less: 18%	9%	Less: 17%
	A little less	7%		8%	
	About the same as usual	59%		57%	
	A little more	16%	More: 24%	18%	More: 26%
	A lot more	7%		8%	
Take public transport	A lot less	9%	Less: 14%	9%	Less: 11%
	A little less	5%		3%	
	About the same as usual	55%		56%	
	A little more	19%	More: 31%	20%	More: 33%
	A lot more	12%		13%	
Stay in to relax / socialise	A lot less	3%	Less: 7%	2%	Less: 7%
	A little less	4%		4%	
	About the same as usual	49%		47%	
	A little more	25%	More: 44%	26%	More: 47%
	A lot more	19%		21%	