



Trust Survey

 July 2023

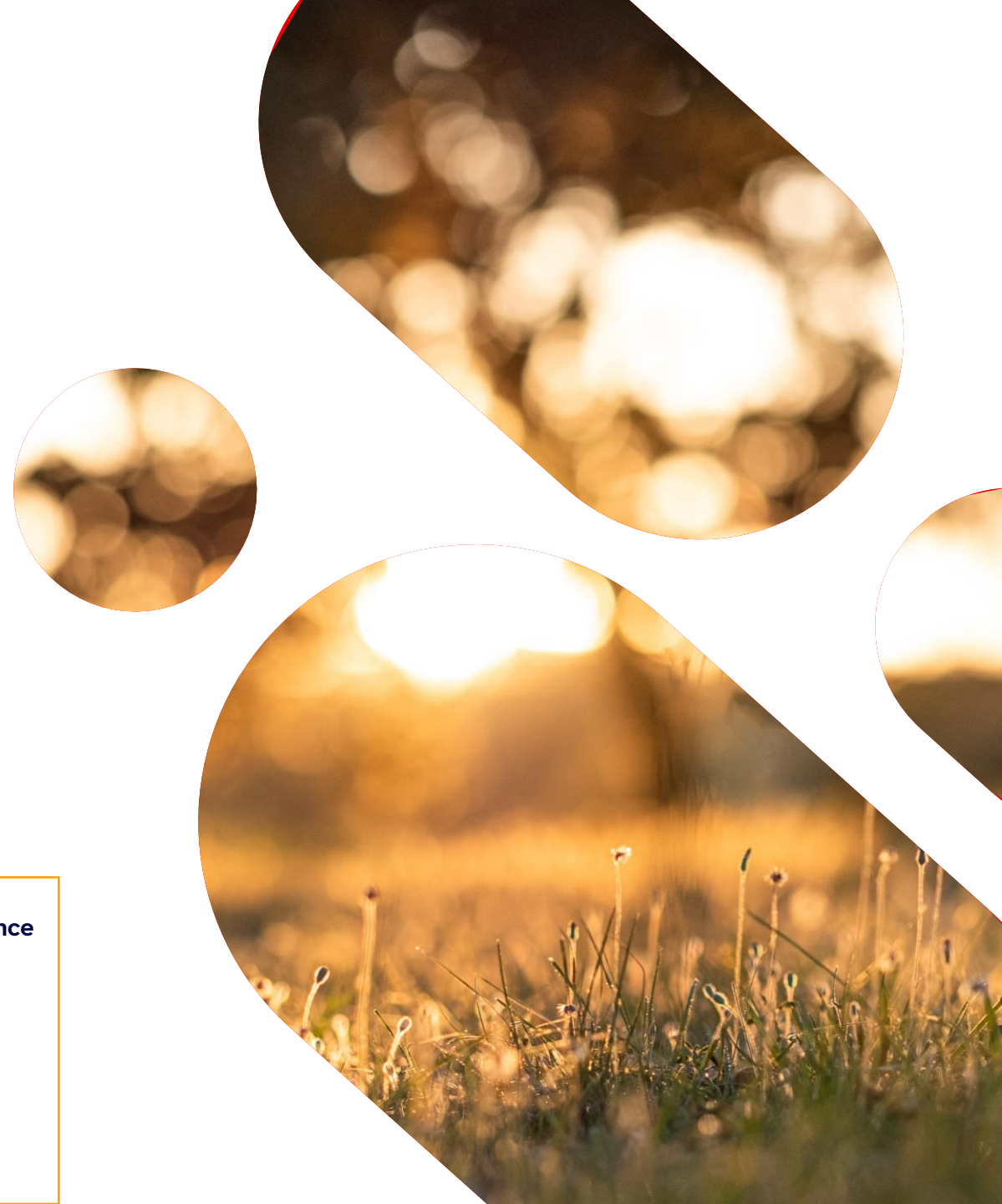
Public confidence in the quest for a
more sustainable world

Our contacts 

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METHODOLOGY

A study to measure the level of public confidence in the creation of a more sustainable world

Aware of the current challenges, and in order to offer companies the most appropriate support, TIC Council - *an international association representing independent testing, inspection and certification companies* - wanted to set up a study to measure the level of public confidence in the actions taken by the economic players (companies, but also national governments and international institutions) to create a more sustainable world.

In addition to the creation of a 'Trust Index' for each of the stakeholders, the aim of this study was to analyse in depth the confidence or, on the contrary, the doubts of the stakeholders with regard to the information transmitted, particularly by companies.



SAMPLE

For this first edition, the study was carried out in two countries. **1007 Germans and 1010 Brazilians were interviewed.**

The representativeness of both samples is ensured within each country through the quota method applied to the following variables: gender, age and region.

Throughout this report, overall results corresponding to the average for the two countries will be shown. Country results will be indicated by the appropriate flags (Germany ; Brazil )



COLLECTION METHOD

The sample was interviewed online using the **CAWI system.**



DATES OF FIELDWORK

The fieldwork was carried out from **June 22 to June 26, 2023.**

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KEY POINTS

Key points – TOTAL SAMPLE

- ✔ In response to an unstable international context, **the majority of Brazilian and German citizens are worried about the future**
- ✔ Citizens cite a wide range of concerns, but **climate change and its consequences are at the top of the list of challenges needed to tackle to build a better world**, ahead of poverty and health.
- ✔ With this in mind, **players such as national governments, international institutions and companies are expected to engage in a more sustainable world.**
- ✔ **If their legitimacy to act is recognised by citizens, their actions are only partially considered as appropriate, effective and fast enough.**
- ✔ Citizens largely feel that they also have the power to act for a more sustainable world as consumers. However, they don't do as much as they can, and social and environmental information provided on products and services does not completely help them to make responsible choices.
- ✔ This expected support should go hand in hand with an increase in confidence: **information about the environmental and social commitment of brands is still questioned**, whatever the sector of activity or its content, and **would benefit from being substantiated and accompanied by 'proof'**.
- ✔ **Labels: a concrete way of proving the 'sustainable' aspect of products or services**, alongside a regular process of checking the information displayed for this purpose.
- ✔ In this context, **independent bodies also have the power to reassure consumers.**

03

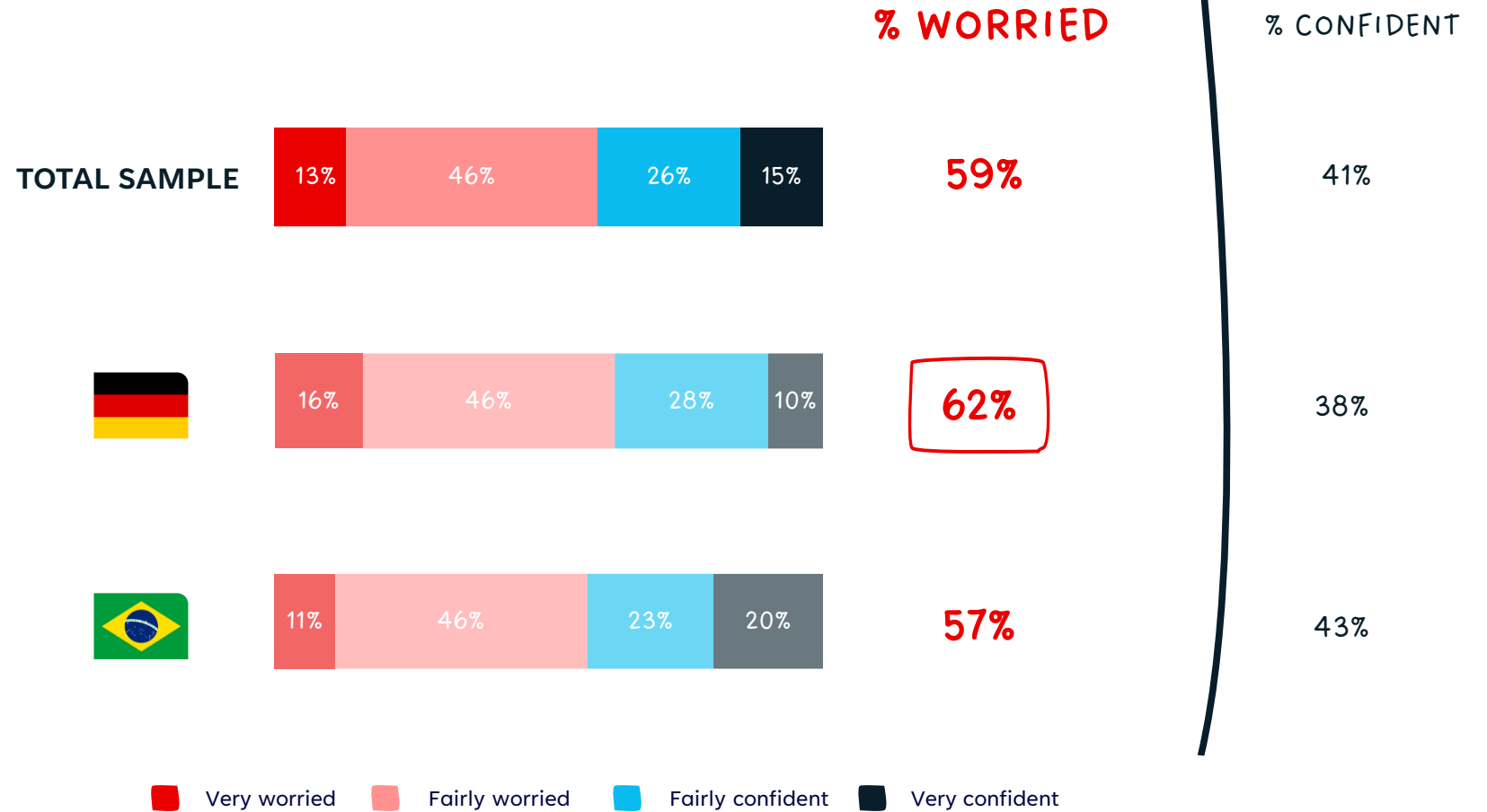
RESULTS

Context : confidence in the future
and main concerns

Confidence in the future of the world

Most Germans and Brazilians are worried about the future, but the feeling is stronger in Germany.

59%
are worried
about the
future of the
world
TOTAL SAMPLE



In general, when you think about the future of the world, would you say you are very confident, fairly confident, fairly worried or very worried?
Base : To all Germans (1007) and Brazilians (1010)

Priorities for improving the world for the future

Health dominates concerns in Brazil while Germans primarily expect action regarding the climate

TOTAL SAMPLE

#1 Climate change (34%)

#2 Poverty (32%)

#3 Health (31%)



#1
Climate
change
(38%)



#2
Poverty
(32%)



#3
International
tensions/wars
(29%)



#1
Health
(39%)



#2
Education
(36%)

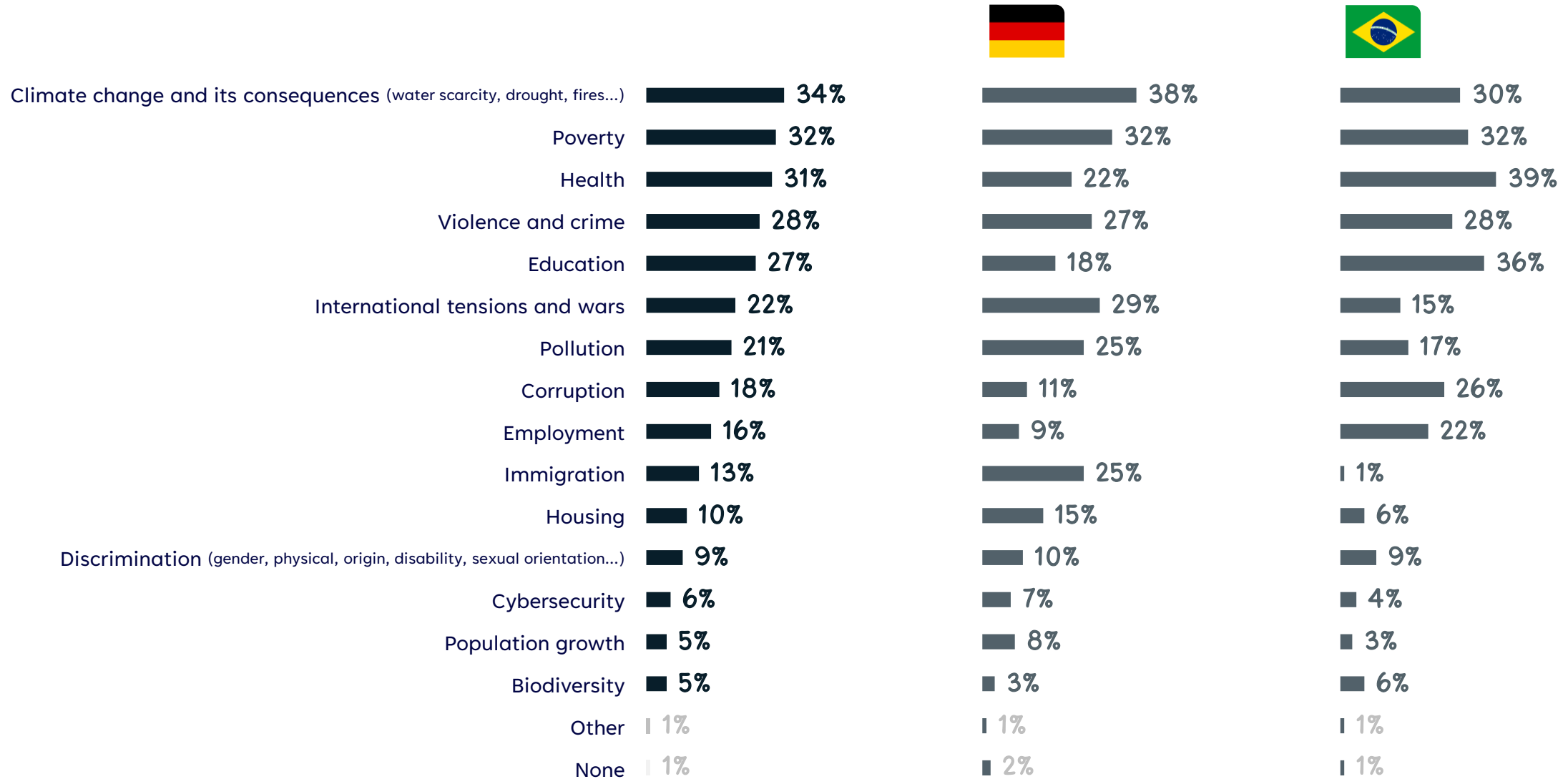


#3
Poverty
(32%)

In your opinion, what should be dealt with first to improve the world for the future ?


Base : To all Germans (1007) and Brazilians (1010)

Priorities for improving the world for the future - Details



In your opinion, what should be dealt with first to improve the world for the future?
 Base : To all Germans (1007) and Brazilians (1010)

Total greater than 100% because three possible answers.
 * item not suggested



03

RESULTS

The "Trust Index" and its components



The *Trust index* in a more sustainable world

Calculation method

Calculated for each of the stakeholders assessed (national governments, international institutions and companies), the *Trust index* is based on 5 questions, each probing a different aspect of the stakeholders' actions in creating a more sustainable world:

- 1. Legitimacy of players :** Do you think each of the following entities have a role to play in creating a more sustainable world?
- 2. Appropriateness of attitude to issues actions taken:** In your opinion, are each of the following entities behaving in a way that helps to create a more sustainable world?
- 3. Effectiveness of actions taken:** In your opinion, are the actions of the following entities succeeding in creating a more sustainable world?
- 4. Pace of actions taken:** In your opinion, are each of the following entities acting quickly enough to create a more sustainable world?
- 5. Empowerment of citizens in their own commitment:** In your opinion, do each of the following entities support you in taking personal action toward a more sustainable world (information, financial support, changes in the law...)?

Statistical analysis of these different dimensions showed a similar impact of each of them on the overall index, expressed as a score out of 100 points.

Therefore, the index is the unweighted average of the 5 dimensions.



The Trust index in a more sustainable world

International institutions obtain the higher trust score in both countries.
Less confidence is given to companies in Germany and in the Government in Brazil.

INTERNATIONAL INSTITUTIONS



TOTAL SAMPLE

63



71



NATIONAL GOVERNMENTS



TOTAL SAMPLE

63



66



COMPANIES



TOTAL SAMPLE

60



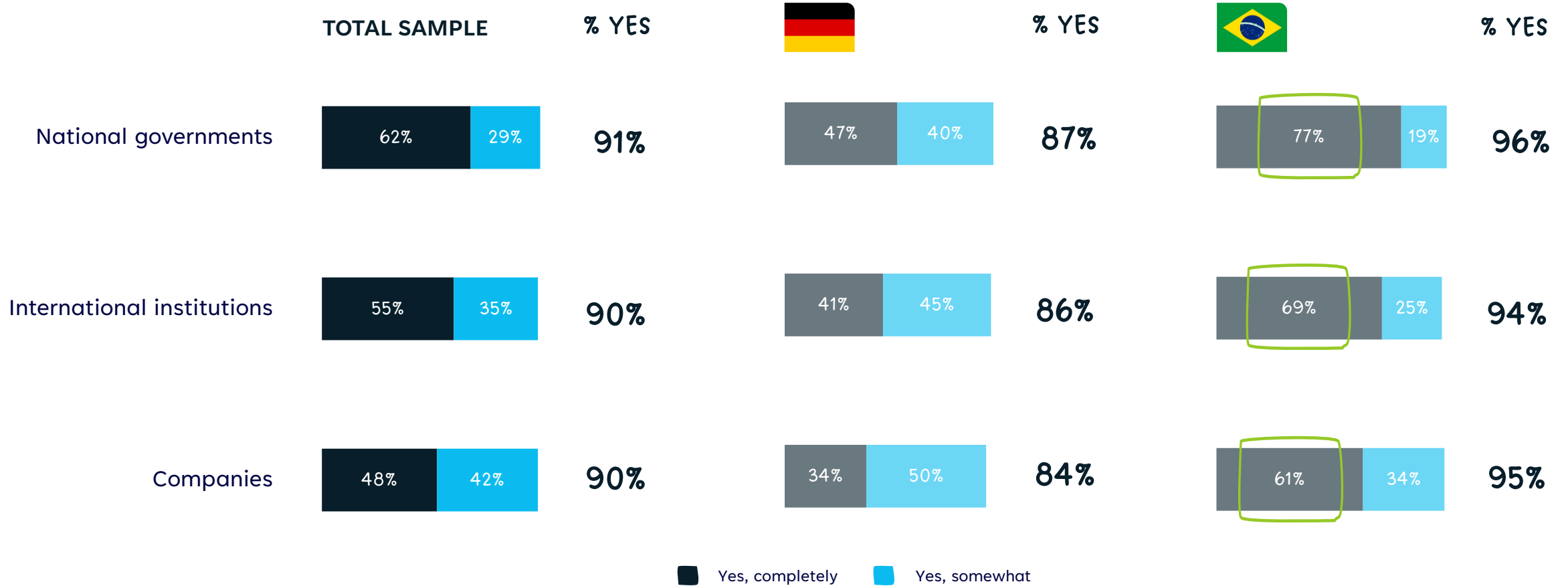
67



Legitimacy of players

The three entities are widely seen as having a role to play in creating a more sustainable world; a more measured enthusiasm is nevertheless to be noted among the Germans.

1. LEGITIMACY



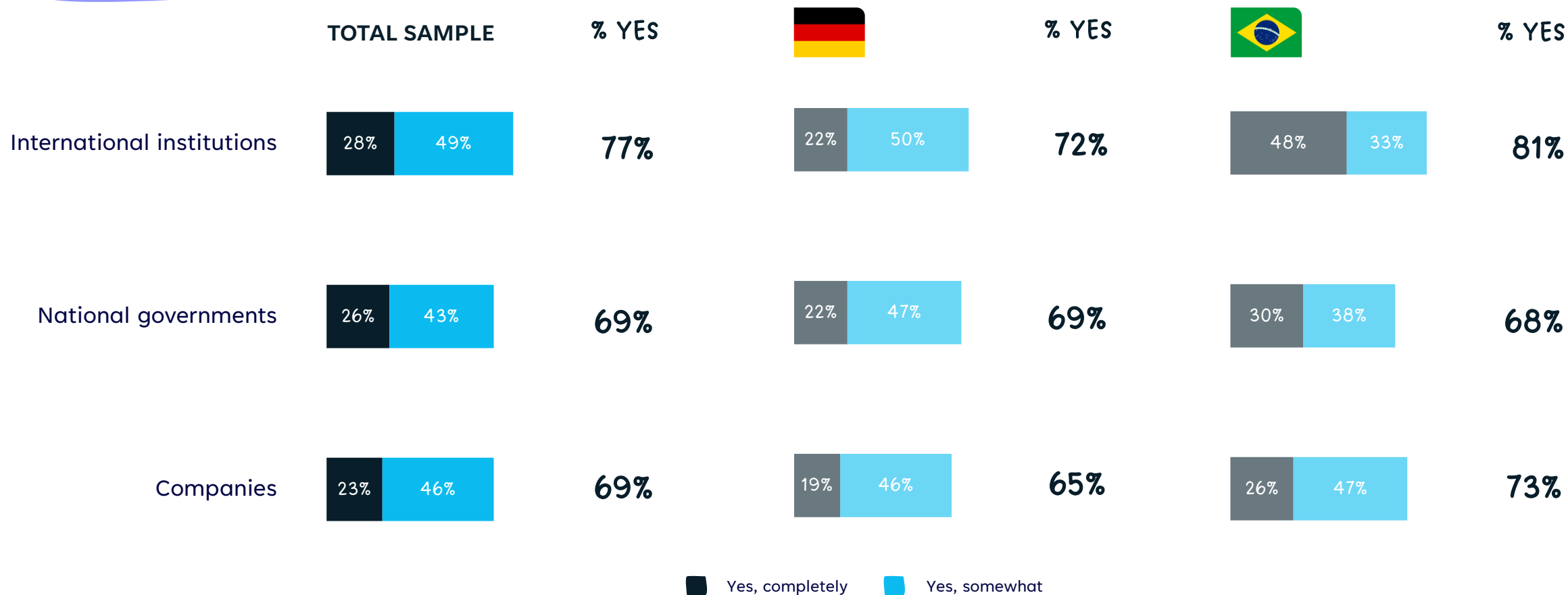
Do you think each of the following entities have a role to play in creating a more sustainable world ?

Base : To all Germans (1007) and Brazilians (1010)

Appropriateness of current actions

In this context, institutions are considered to have the most appropriate behaviour - but as in the case of companies and governments, both German and Brazilian are not completely convinced by the actions taken.

2. APPROPRIATENESS



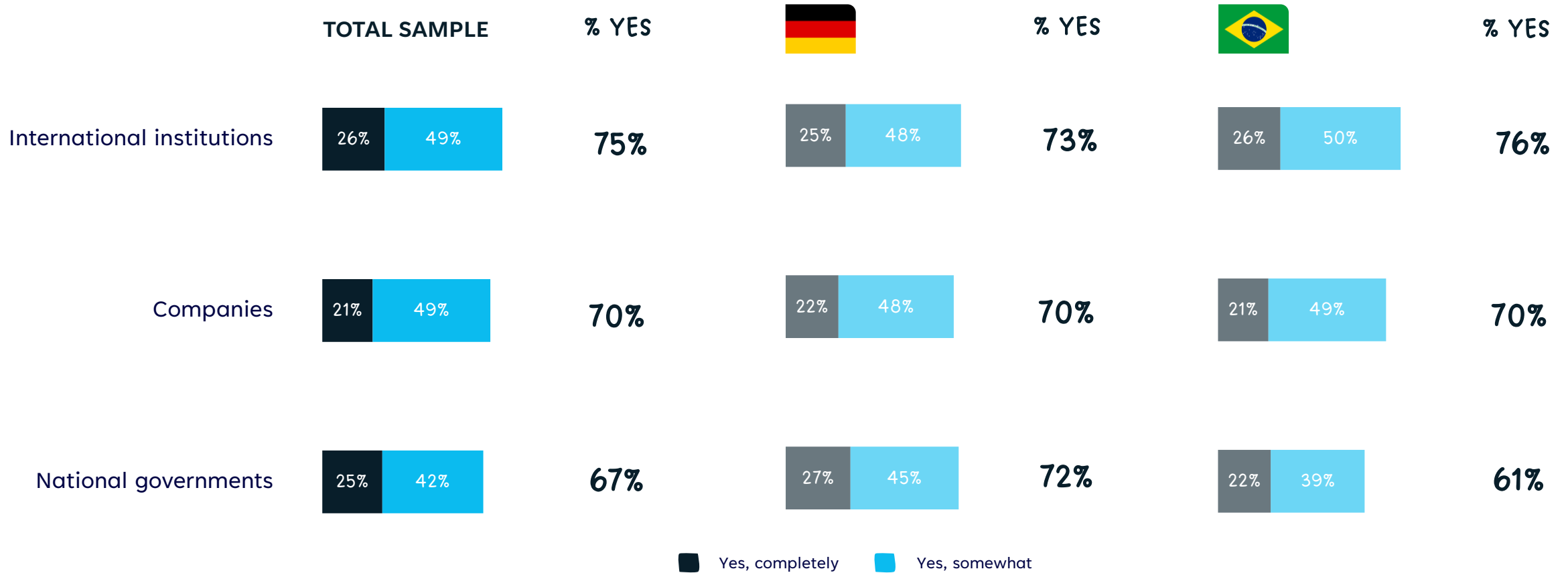
In your opinion, are each of the following entities behaving in a way that helps to create a more sustainable world ?

Base : To all Germans (1007) and Brazilians (1010)

Effectiveness of actions taken

This judgement is also reflected in the evaluation of the effectiveness of the actions implemented by these three players; none of them really seem to stand out. In Germany, as in Brazil, only around a quarter of the population consider their actions to be successful.

3. EFFECTIVENESS



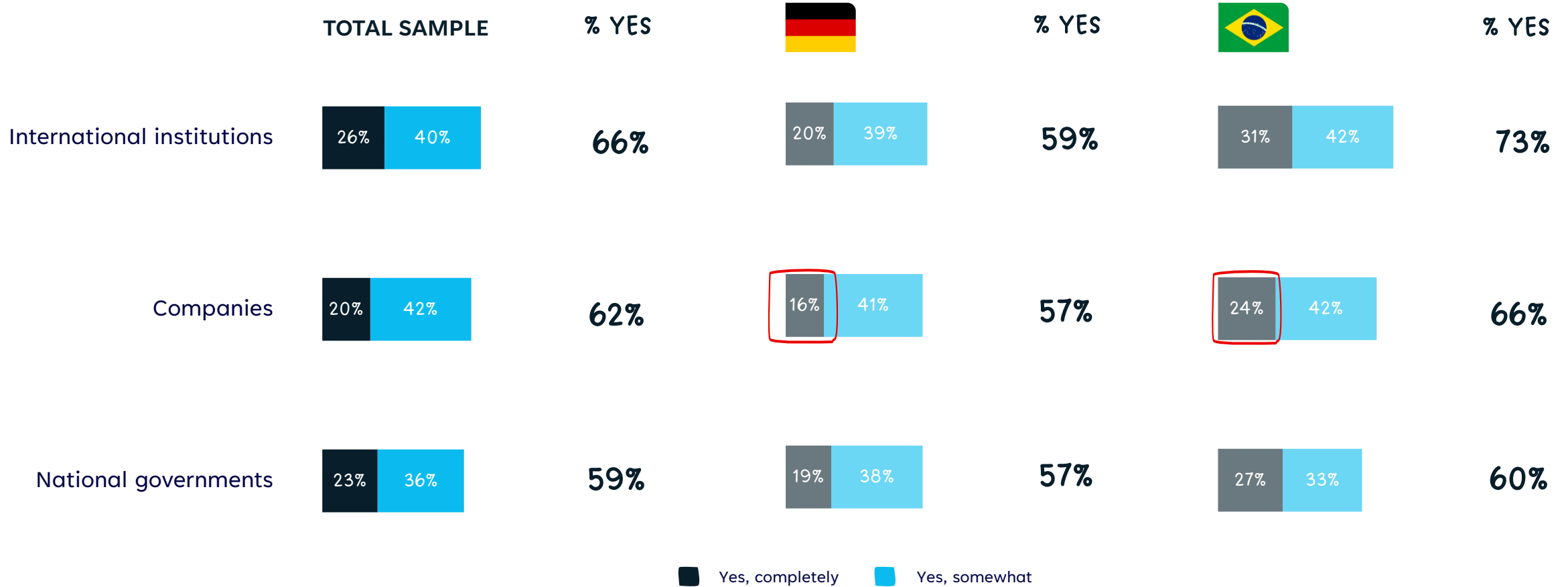
In your opinion, are the actions of the following entities succeeding in creating a more sustainable world?

Base : To all Germans (1007) and Brazilians (1010)

Pace of actions

Only a small proportion of people seem to be fully convinced by the pace of these actions, certainly expected to be more intense in view of the increasingly important issues at stake.

4. PACE



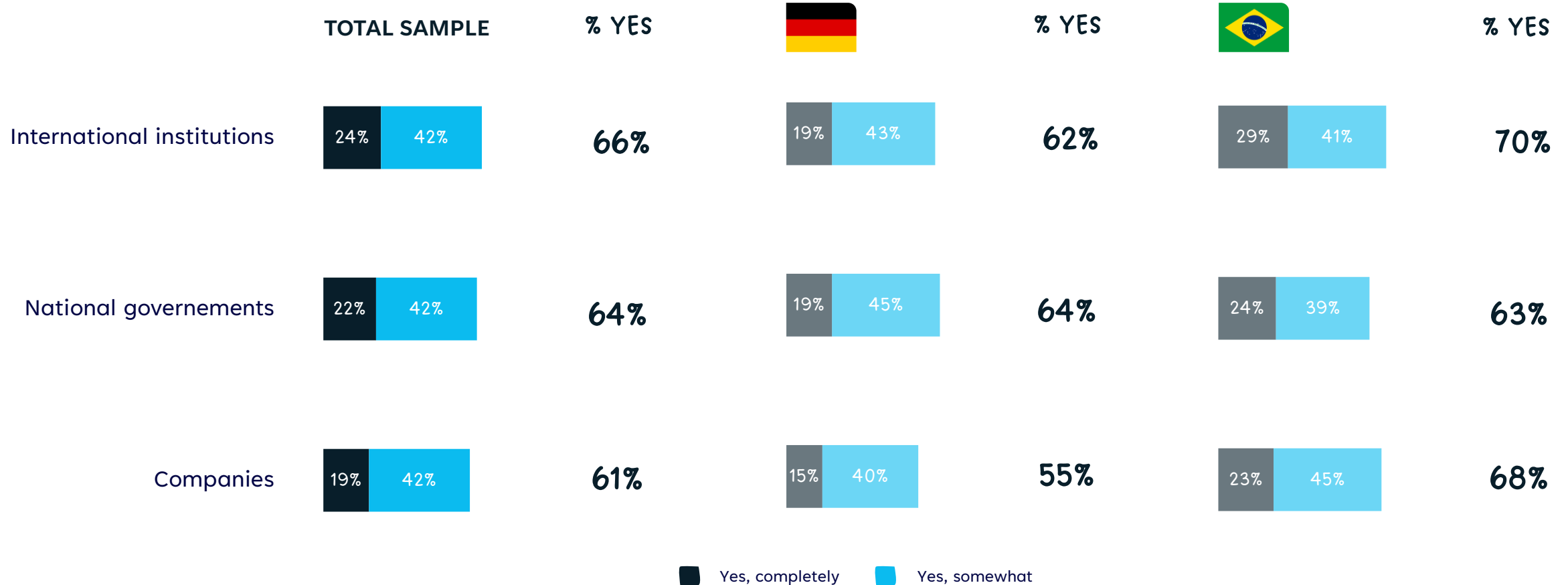
In your opinion, are each of the following entities acting quickly enough to create a more sustainable world?

Base : To all Germans (1007) and Brazilians (1010)

Capability to accompany citizens

While the majority of Germans and Brazilians consider that their personal approach is helped by the various stakeholders, they expect firmer support.

5. EMPOWERMENT



In your opinion, do each of the following entities support you in taking personal actions toward a more sustainable world (information, financial support, changes in the law...)?
 Base : To all Germans (1007) and Brazilians (1010)

03

RESULTS

Perception of environmental and social information delivered to consumers

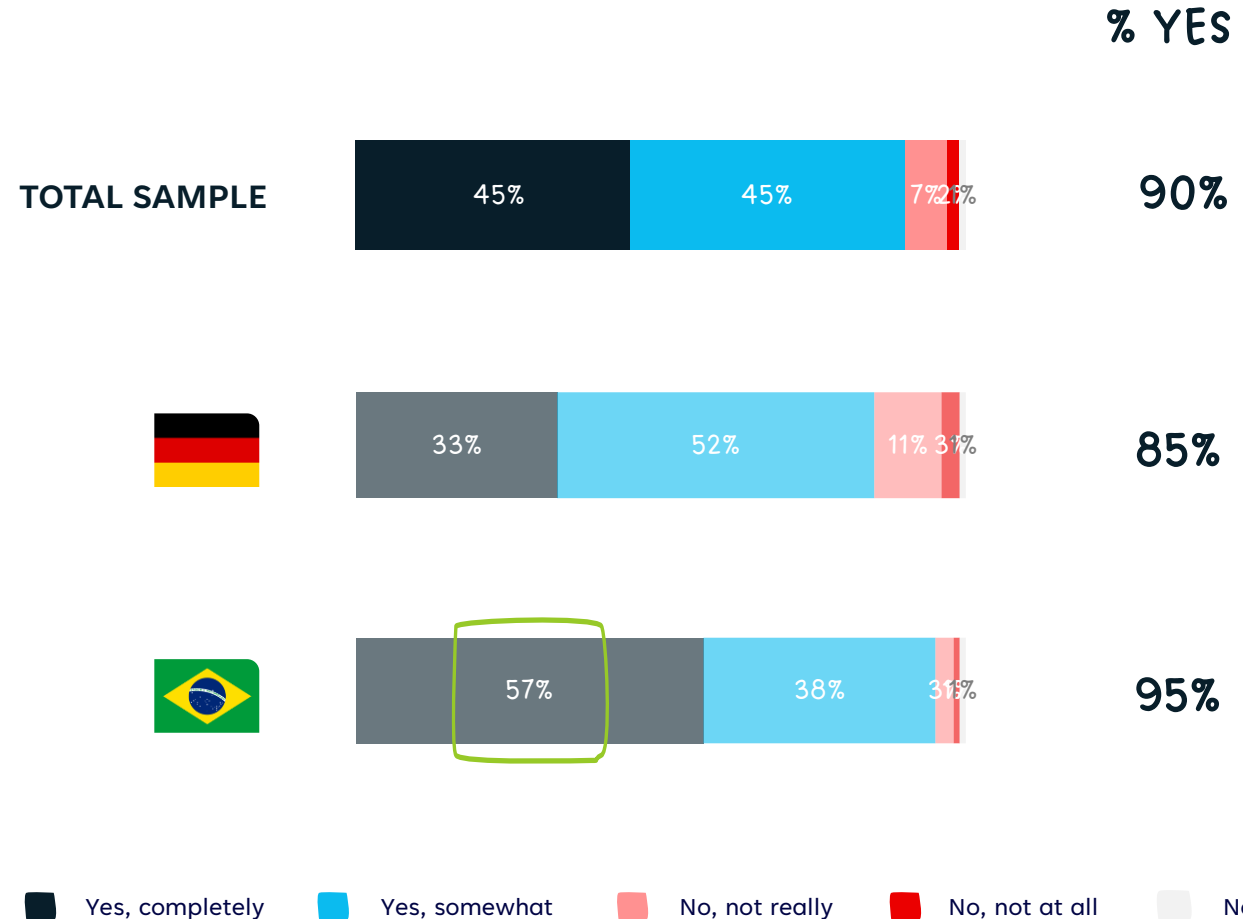
Consumers' ability to make the world more sustainable

Both Brazilians and Germans believe that, as consumers, they have the power to act for a more sustainable world; Brazilians are more adamant about it.

90%

believe they have the power to create a more sustainable world as consumers

TOTAL SAMPLE



Would you, as a consumer, say that you have the power to help create a more sustainable world through your purchasing behaviour?

Base : To all Germans (1007) and Brazilians (1010)

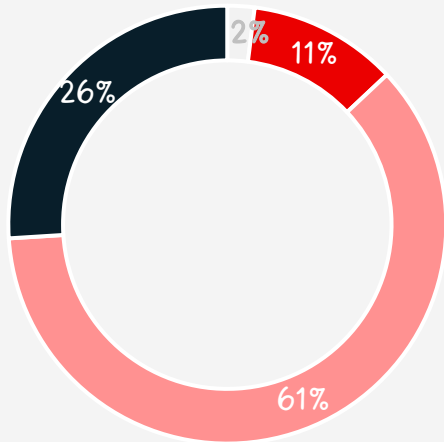
*item not suggested

Individual behaviour with regard to sustainable development

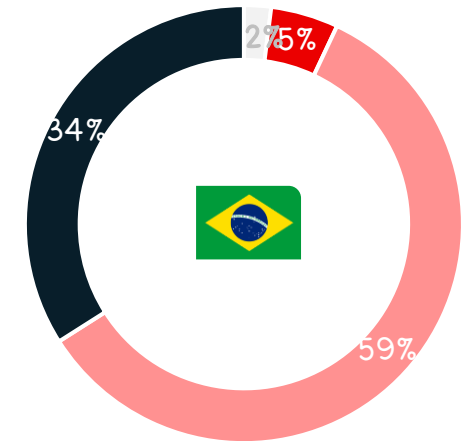
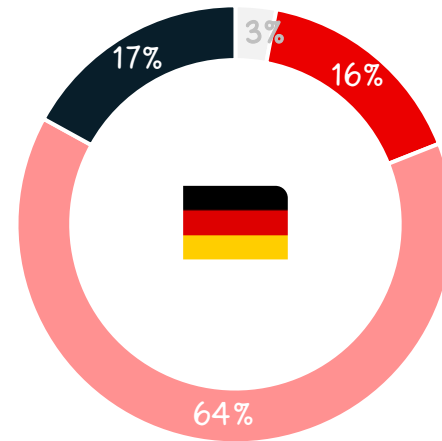
But for now, in both countries, the majority feel that they are not doing as much as they could.

61%

feel they can do more



TOTAL SAMPLE



- You do a lot and encourage those around you to adopt good practices
- You already do some things, but you know you can do more
- You do little, sustainability is not a concern for you
- No answer*

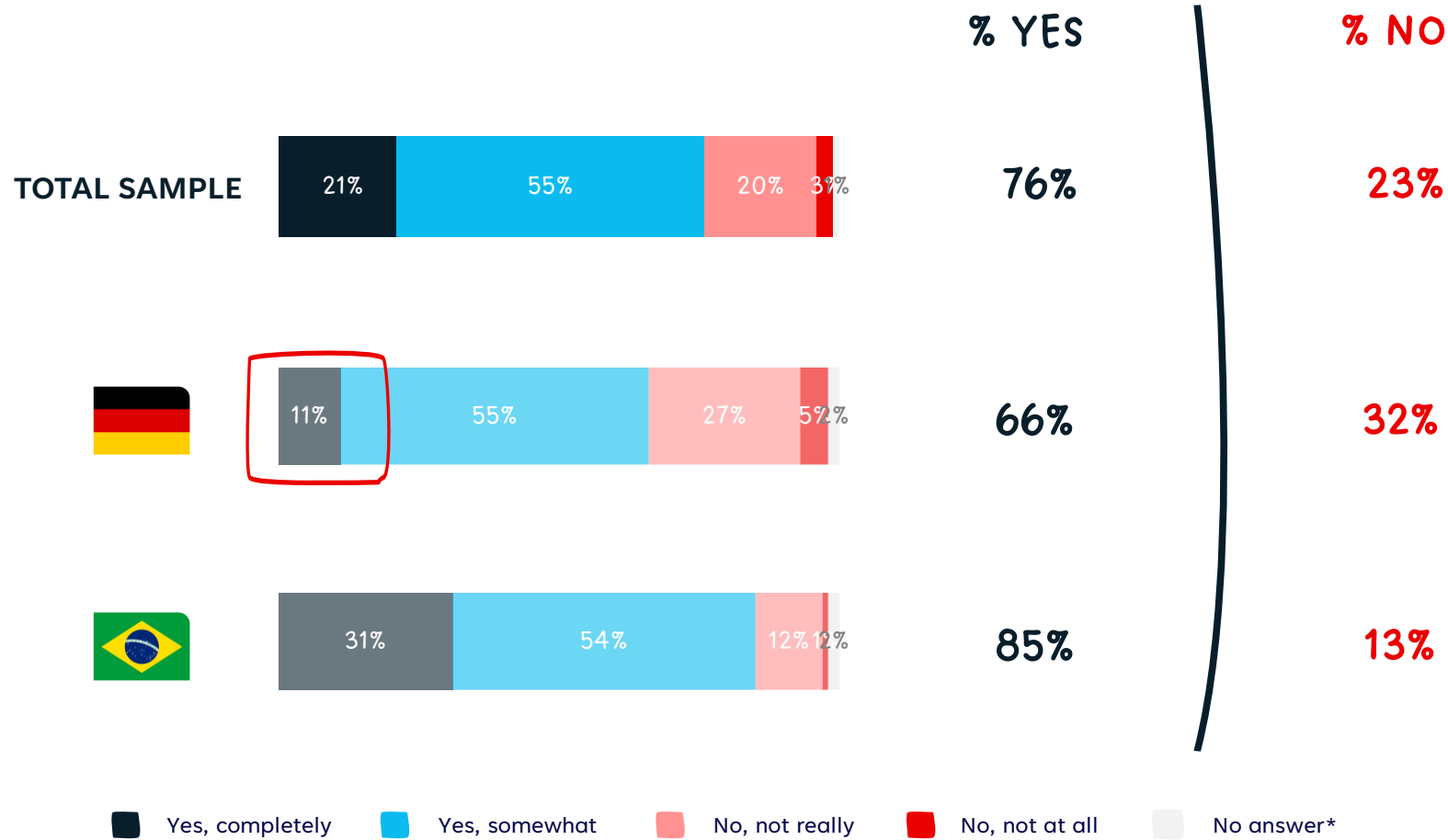
How would you describe your own behaviour in terms of sustainable development?

Base : To all Germans (1007) and Brazilians (1010)

*item not suggested

Level of information needed to make responsible choices

One of the reasons for this discrepancy is that information is not always available for informed consumption - a point made particularly by the Germans



ONLY
21%
 feel that the information provided really enables them to choose the most responsible products.

And do you feel today that the information available to you enables you to choose the most environmentally and socially responsible products and services?

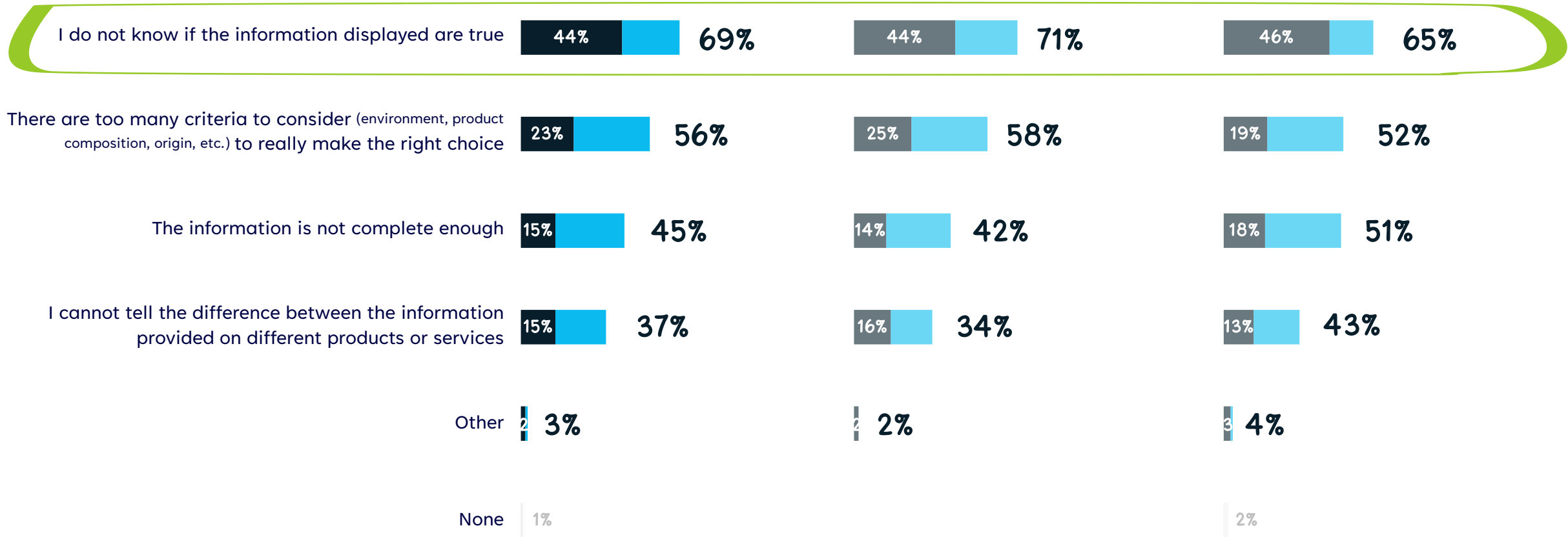
Base : To all Germans (1007) and Brazilians (1010)

*item not suggested

Perception of the information provided

Most Germans and Brazilians who say they are unable to choose the most responsible products express doubts about the veracity of the information provided.

■ First ■ Then **XX%** Global



What is/are the reason(s)?

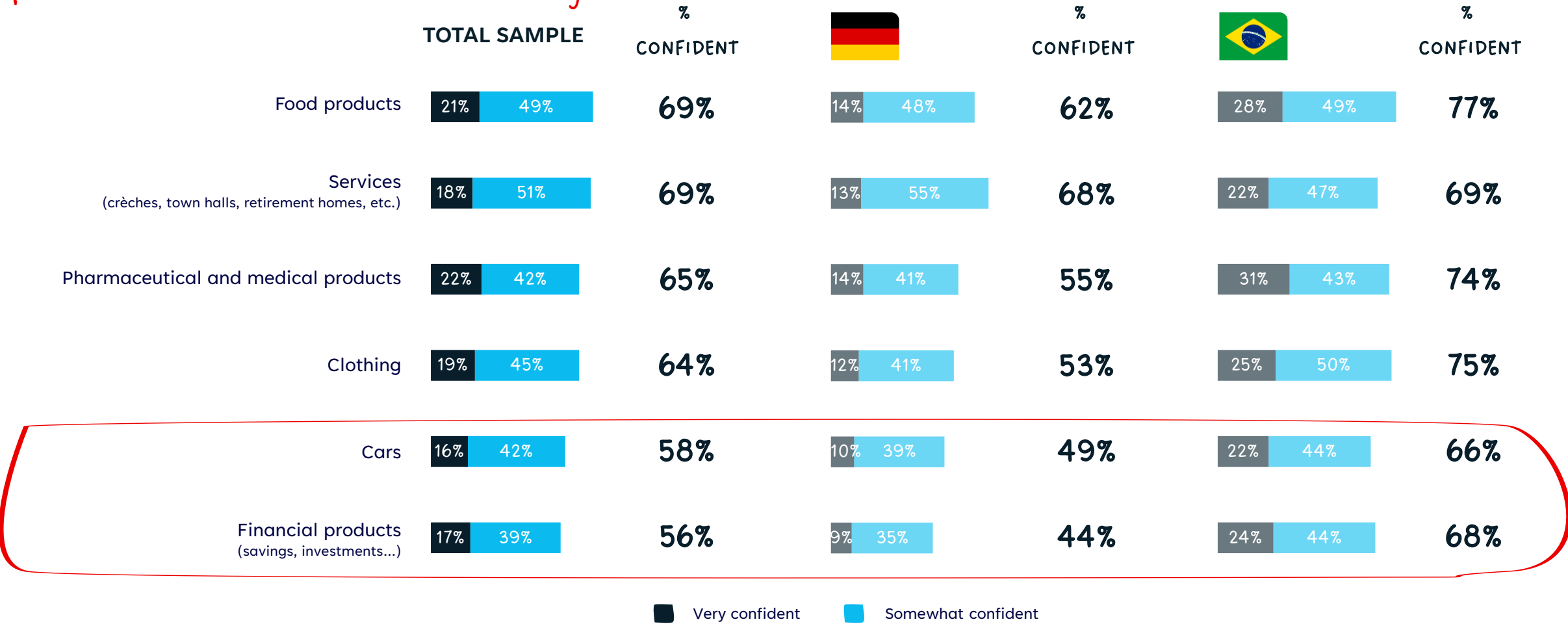
Base : To respondents who feel they have not the information they need to choose the most responsible products (322 Germans ; 135 Brazilians)

Total greater than 100% because several possible answers.

* item not suggested

Confidence in the information provided - *By sector of activity*

This lack of confidence is true across all sectors; few respondents, whether Brazilian or German, are totally confident in the information provided in the various spheres of activity. The automotive and financial sectors are the two most challenged.

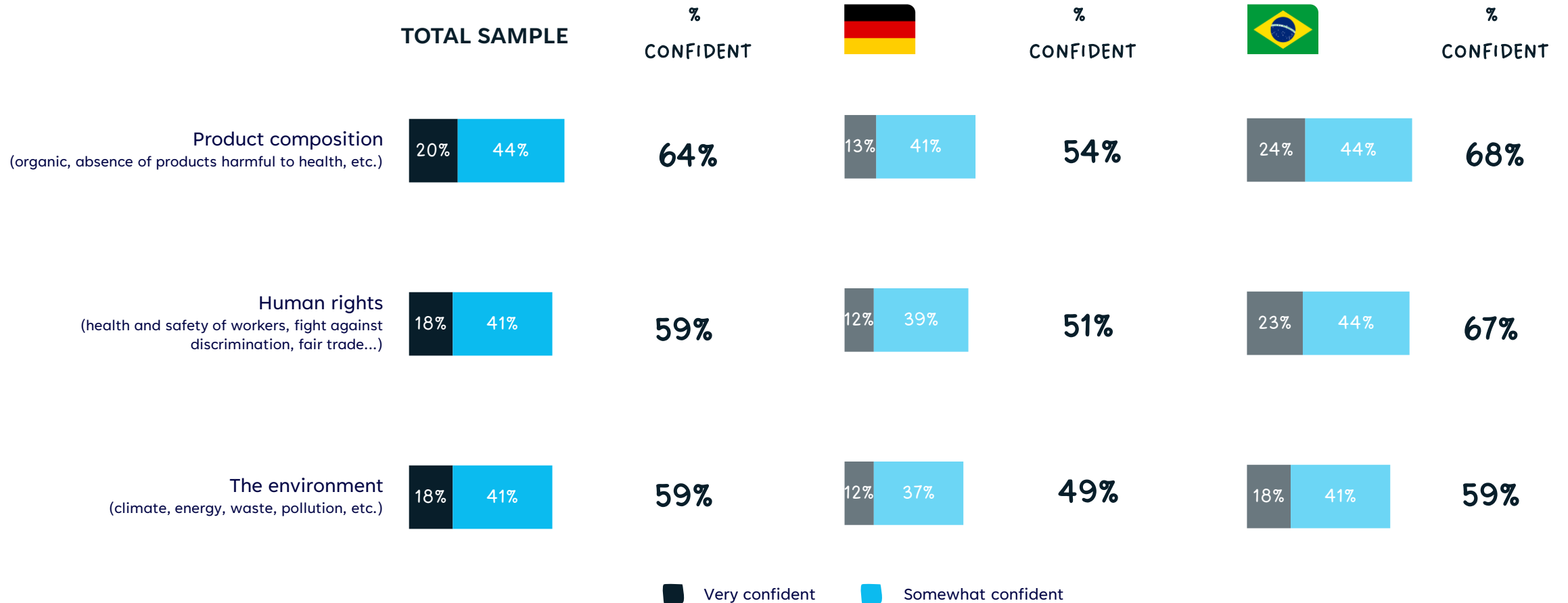


Are you very confident, somewhat confident, not very confident or not confident at all in the information provided on...?

Base : To all Germans (1007) and Brazilians (1010)

Confidence in the information provided - *By criteria*

The same applies to information content - confidence in the various elements is only partial, in Brazil as well as Germany

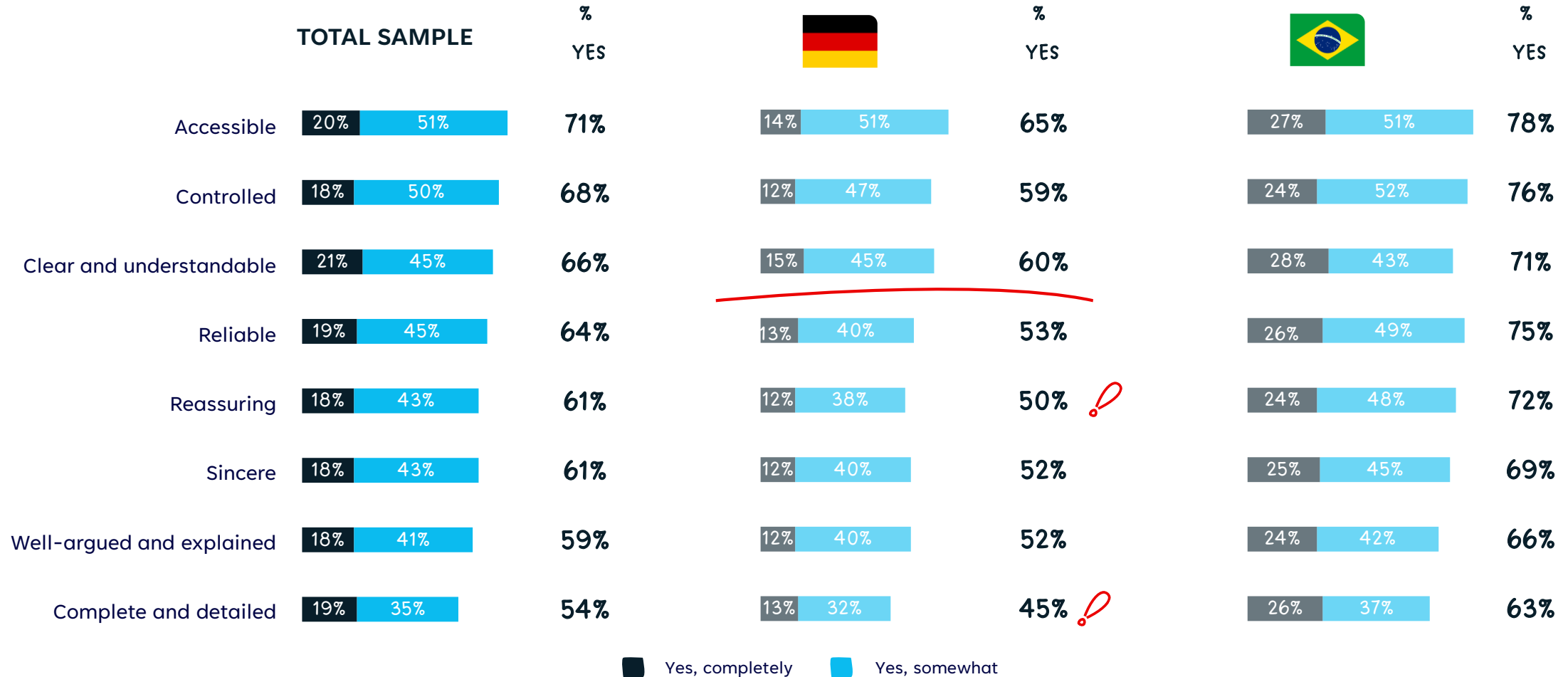


Are you very confident, somewhat confident, not very confident or not confident at all in the information provided on...?

Base : To all Germans (1007) and Brazilians (1010)

Detailed perception of environmental and social information

In general terms, Germans point out the lack of detail in the information and the fact that it is not necessarily reassuring. Brazilians are generally more positive, although far from being completely convinced.

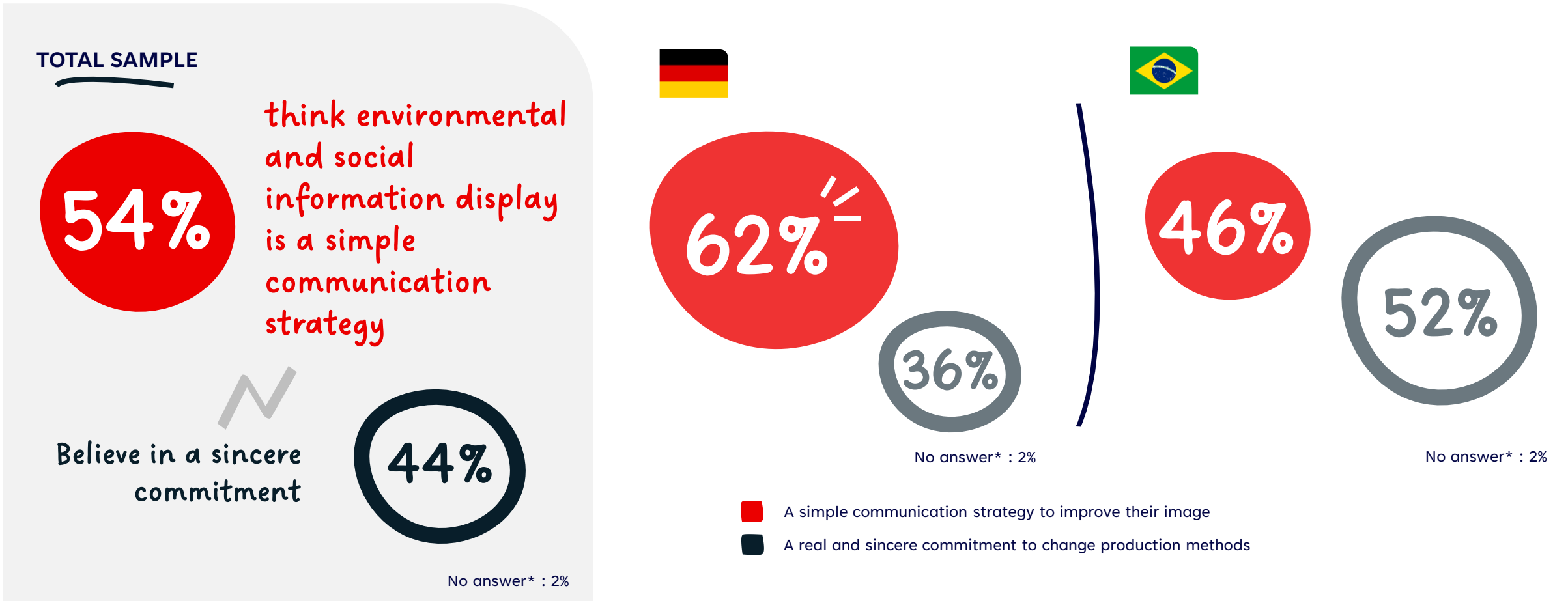


More specifically, in your opinion, is the environmental and social information made available to you when purchasing products and services to guide you in your choices...

Base : To all Germans (1007) and Brazilians (1010)

Communication strategy or real commitment?

While the Brazilians are divided on this issue, the Germans, in line with previous findings, are more critical and see it more as a branding strategy.



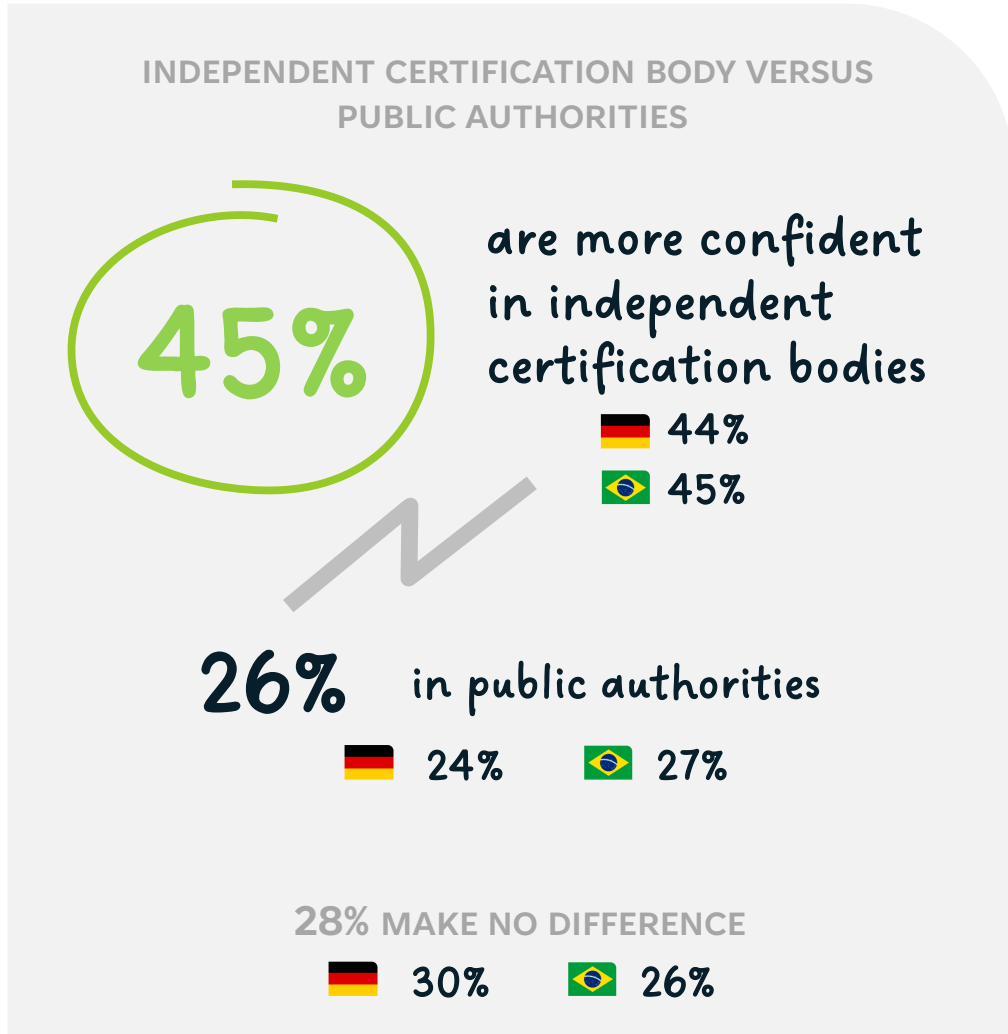
Today, many brands display environmental and social information to show that their products and services are working towards a more sustainable world. In your opinion, does this information demonstrate...

Base : To all Germans (1007) and Brazilians (1010)

*item not suggested

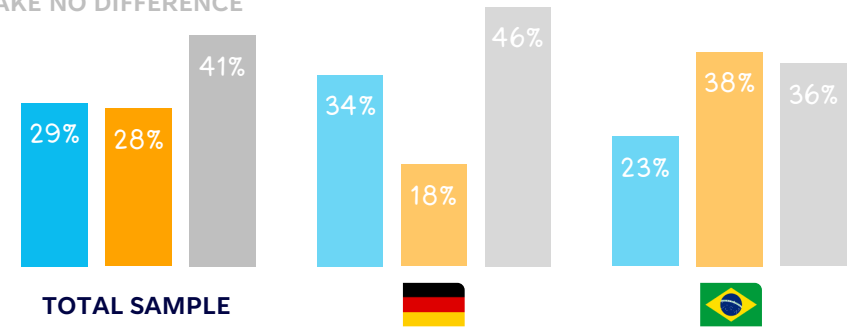
Confidence in the information provided - By actor

In this context, respondents favour independent certification bodies over the information provided by public authorities

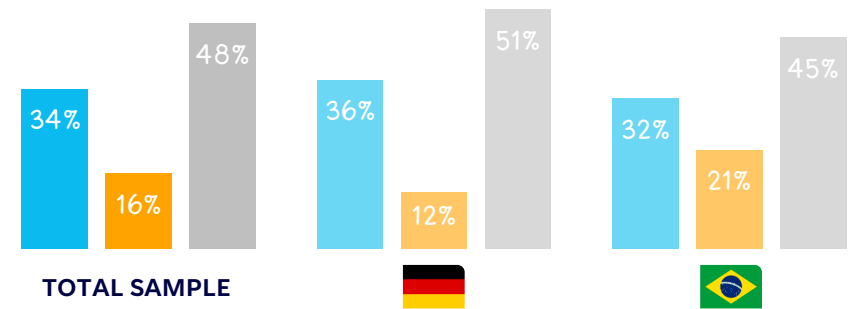


More confident in...

PUBLIC LABELS
PRIVATE LABELS
OR MAKE NO DIFFERENCE



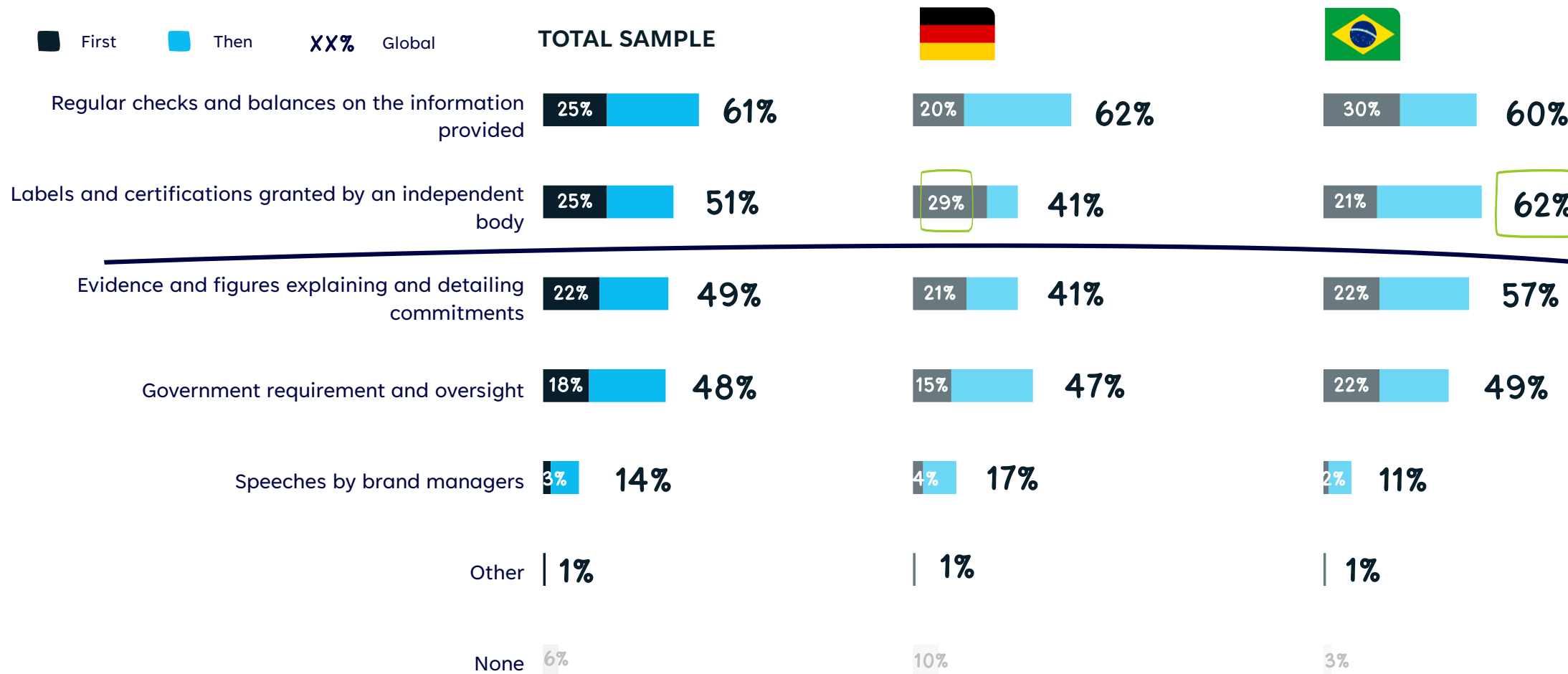
SHOPS/BRANDS
ONLINE SALES SITES
OR MAKE NO DIFFERENCE



Are you more confident in the environmental and social information provided...?
Base : To all Germans (1007) and Brazilians (1010)

Confidence vectors

Labels are considered by Germans as the first proof of the veracity of the information. Brazilians also pay attention to regular checks.



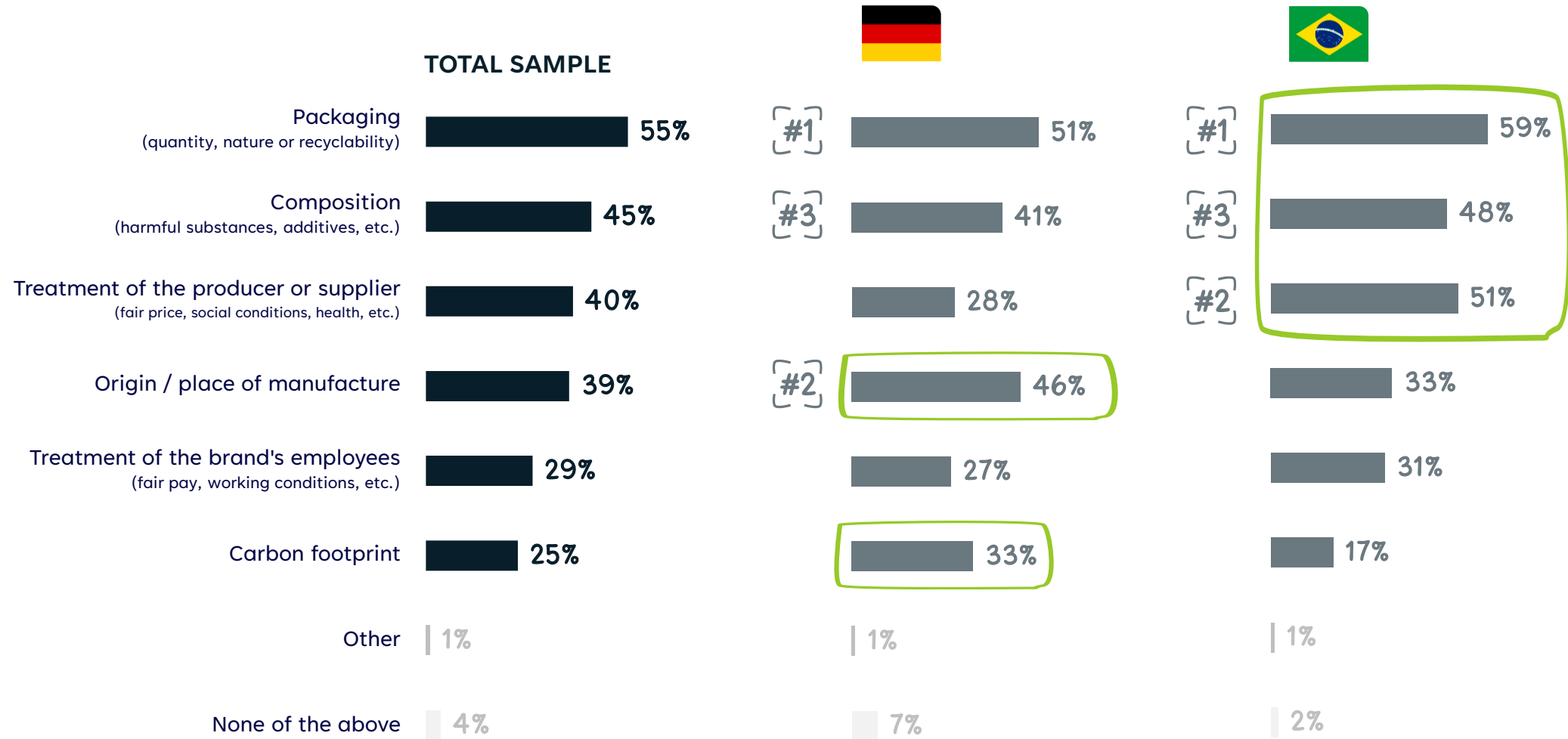
What would give you the most confidence in the environmental and social quality of the products and services you buy?
 Base : To all Germans (1007) and Brazilians (1010)

Total greater than 100% because several possible answers.
 * item not suggested

04

APPENDIX

Criteria for choosing a responsible product or service



In addition to price, what are the most important criteria for you when choosing a responsible product or service?
 Base : To all Germans (1007) and Brazilians (1010)

Total greater than 100% because three possible answers.
 * item not suggested

Detailed perception of government action on sustainable development

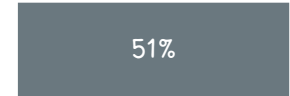
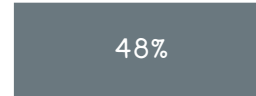
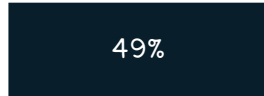
Your government...

% YES

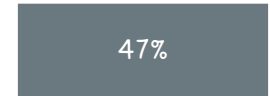
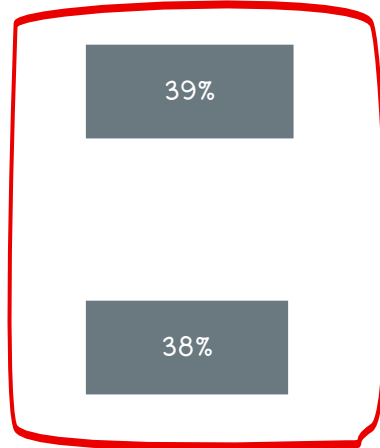
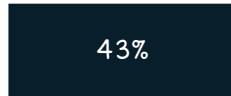
TOTAL SAMPLE



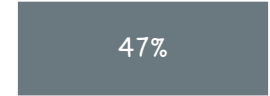
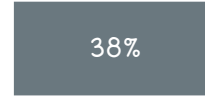
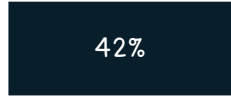
Creates the appropriate rules and laws to change behaviour



Has sufficient control over the implementation of the sustainability-related laws protecting the environment and the human rights



Is effectively consulting and including all impacted stakeholders in the development of new rules and laws



To create a more sustainable world, would you say that...
Base : To all Germans (1007) and Brazilians (1010)