Di Marzio Research

MARKETING AND STRATEGIC RESEARCH CONSULTANCY

A REPORT ON: TRUST AND SKEPTICISM

Prepared for:	**Cavill + Co**
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purposeful profitable partnerships

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About this study

This document shows the results for three questions included by ***Cavill and Co*** in our Online Omnibus Survey No. 28, details of which are shown below:

Method:	Online e-mail survey.
Respondents:	A sample of Australians aged 18+ who use the internet.
Sample Size:	1,200 nationally.
Internet Penetration in Australia	94% or over 21 million users (June 2014). Source: Internet World Stats.
Source:	Accredited online research panel – Survey Sampling International.
Metro / Rural Split:	68 : 32 (865 metro / 435 non-metro).
Male / Female Split:	50 : 50.
Weighting:	To latest Census population statistics by age, gender and location.
Field Dates:	September 23-29, 2015

By State, the following sample sizes are sought in each omnibus survey we conduct:

	Metro	Rural	Total
New South Wales	240	110	**350**
Victoria	200	100	**300**
Queensland	135	65	**200**
South Australia	120	55	**175**
West Australia	120	55	**175**
TOTAL	**815**	**385**	**1,200**

The following demographics were also collected:

Gender	Education
Age	Household size
Work Status	Household income
Occupation	Home ownership
Marital status / Lifecycle stage	NESB/ATSI background
Country of Birth	State

The results for each question are presented in the next section for the total sample as well as by gender and age group. The demographic details relating to the final sample achieved in this survey then appear, followed by the questions asked. The first question was also included in our November 2011 omnibus survey and a comparison of results is shown for the total sample.

Summary of Results

Trusted Information Sources

***Q1**: There are many sources of information about what companies or brands are doing or not doing to support the community or protect the environment. What sources of information would you trust the most to tell you about these sorts of things?*

Information Source	Total Sample			Gender		Age				
	2008* (500) %	2011 (1,199) %	2015 (1,217) %	Male (600) %	Female (617) %	18-24 (136) %	25-34 (219) %	35-44 (234) %	45-54 (225) %	55+ (403) %
Consumer organisations such as Choice	61	49	**38**	37	40	**18**	**24**	**36**	**42**	**54**
Information on the company's website	31	29	**34**	**32**	**37**	**34**	**26**	**36**	**37**	**37**
Information in the store or point of purchase	27	26	**28**	**25**	**31**	**23**	**21**	**29**	**25**	**35**
What you find out from friends or relatives	27	37	**27**	25	28	**21**	**19**	**28**	**26**	**33**
Advertising on TV	29	29	**25**	25	25	23	26	26	28	24
Information provided by charities or environmental groups	50	31	**25**	**22**	**29**	20	23	26	27	27
Information on the product packaging	31	25	**21**	**18**	**25**	**17**	20	21	19	**25**
Editorials or stories in the media	44	29	**18**	19	18	**10**	**15**	**16**	**23**	**22**
Advertising in newspapers or magazines	20	23	**16**	16	17	16	15	15	20	16
A special company social or environmental report	21	21	**15**	14	15	19	15	13	15	13
Information in the company's annual report	31	15	**13**	13	14	**16**	**19**	**11**	**15**	**10**
Social media like Facebook	6	NA	**12**	11	13	**21**	**20**	**8**	**10**	**8**
Radio advertising	16	16	**11**	11	12	11	11	10	11	13
Direct mail or included in an account or bill	17	16	**11**	**8**	**13**	**5**	**10**	**8**	**14**	**13**
Outdoor posters	10	10	**8**	8	8	7	**10**	**9**	9	**6**
Don't know / can't say	NA	12	**22**	23	**20**	**26**	24	22	20	**19**

***Note**: **Blue** and **red** figures denote differences between segments shown that are statistically significant at the 95% confidence level. NA = not included in 2011 and result not available in 2008. Gender and Age results based on 2015 findings only

Q1 above was asked in Di Marzio Research online omnibus surveys in 2011 and 2014 using a consistent sampling approach with 1,200 adult Australians surveyed online which allows direct comparison of those results. The 2008* result is based on the Real Not Spiel study conducted by Sweeney Research involving 500 online interviews. Although the method was the same (online) and a national coverage was obtained, the questioning approach then was slightly different even though it addressed the same issue. Accordingly we cannot directly compare the 2008 result with the 2011 and 2014 results but it does provide a guide to the behaviour of interest at the time and in our view provides a useful reference point. The main difference in the questioning across the three surveys was related to the response option 'Social media like Facebook' which was not included in 2011 and was listed as 'Network advertising such as Facebook' in 2008. Also, the response option 'Blogs' was included in 2008 (mentioned by 7%) but it was not included in 2011 or 2014.

Notwithstanding the above, there appears to have been a general decline in the proportions who trust each of the sources listed relative to 2008 and 2011.

Comparing just the 2011 and 2014 results, the following is noteworthy:

– Most of the options received fewer mentions than in 2011 which would be explained by inclusion of the *'Social Media'* option and a higher incidence of *'don't know/can't say'* responses – 22% c/w 12% in 2011.
– The *'don't know'* response is interesting. It is not insignificant at 22% and was pretty consistent across the gender and age group divide. This suggests that communications or messages in this space are not being noticed or are not engaging enough to have been evaluated for trust by quite a few people.
– Despite the above, there is a consistency in the assessments observed here. As in 2011 the most trusted source is *consumer organisations such as Choice* and at the bottom rung we again find *outdoor posters, direct mail, radio advertising* and *information in the company's annual report.* To this group we can also now add *social media like Facebook*. None of these five sources were mentioned by more than 13%.
– Trust accorded to *Consumer organisations like Choice* is similar for males and females but increases significantly with age. This was nominated by three times as many respondents aged 55 plus than 18-24 year olds – 54% to 18%.

- *Consumer organisations like Choice* is the most trusted source for the 45-54 and 55 plus age groups and the equal most trusted source for the 35-44s. However it is outranked by other sources in the 18-24 and 25-34 age groups.
- It is revealing that *social media like Facebook* generates at least twice as much trust in the under 35 age cohort than the over 35s. The gender difference here is slight.
- The other option in the digital space – *information on the company's website* – appears to have increased in the trust stakes since 2011 being nominated now by 34% c/w 29% earlier. This ranks it second overall and up from equal fourth previously.
- *Information on the company's website* is also quite clearly the most trusted source on the list for 18-24s, equal most trusted for 25-34s and 35-44s and second most trusted for the 45-54s and 55 plus age groups. This source also ranks second for males and females.
- In terms of generating trust across the community at large, these results point to the company website as the best option, although of course relying only on one source would not be as penetrating as a well-considered, multi-source strategy.

Demonstrating Genuine Commitment to a Cause

Q2: *Listed below are various ways that companies or brands support charitable, social or environmental causes. In order, please nominate the three that you feel best demonstrate that the company or brand is genuine about supporting the charity or cause?*

Ways of demonstrating support	Total sample (n=1,217)				
	1st choice %	2nd choice %	3rd choice %	**In top 3 %**	**Not in top 3 %**
Getting stuck in at the grass roots level, making things happen not just donating money (e.g. bullying prevention programs in schools)	18	16	13	**47**	**53**
Works to address the root of the problem not just band aiding (so eradicating homelessness not paying for swags)	18	16	11	**45**	**55**
Supports lots of charities or causes with small amounts of donations (e.g. lots of charities get $10,000)	15	12	9	**36**	**64**
Supports a couple of charity/community partners with large sums of money and support (i.e. a big chunk of cash to a couple of charities)	10	9	10	**29**	**71**
Making a significant and tangible impact in one area to one issue (so focussing on environment or health or poverty rather than doing all 3)	9	11	12	**32**	**68**
Donating significant staff expertise to help a charity or cause become more efficient (e.g. building on-line programs)	8	10	12	**30**	**70**
Partnering to provide expertise and time as well as money (such as providing money and experts to build a smart phone APP)	7	7	9	**24**	**76**
An issue or cause that aligns to the business they are in (so a health insurance company supporting health causes)	6	7	9	**21**	**79**
Educate customers about a social issue but doesn't donate money (e.g. using their marketing channels to encourage people to wear sunscreen)	4	6	7	**16**	**84**
Raising funds from customers for the cause but not contributing their own money (e.g. tins in retail stores)	3	4	4	**11**	**89**
Raising funds from staff for the cause but not contributing their own money (e.g. helping staff to donate)	2	3	3	**9**	**91**

Ways of demonstrating support (cont.)	Total In top 3 (1,217) %	Gender		Age				
		Male (600) %	Female (617) %	18-24 (136) %	25-34 (219) %	35-44 (234) %	45-54 (225) %	55+ (403) %
Getting stuck in at the grass roots level, making things happen not just donating money (e.g. bullying prevention programs in schools)	**47**	45	48	**41**	**40**	**44**	48	**53**
Works to address the root of the problem not just band aiding (so eradicating homelessness not paying for swags)	**45**	**42**	**48**	**32**	**44**	**39**	**48**	**53**
Supports lots of charities or causes with small amounts of donations (e.g. lots of charities get $10,000)	**36**	35	36	37	31	39	33	37
Supports a couple of charity/community partners with large sums of money and support (i.e. a big chunk of cash to a couple of charities)	**29**	29	30	**23**	**37**	**29**	**26**	**29**
Making a significant and tangible impact in one area to one issue (so focussing on environment or health or poverty rather than doing all 3)	**32**	**35**	**29**	33	29	31	36	33
Donating significant staff expertise to help a charity or cause become more efficient (e.g. building on-line programs)	**30**	30	30	29	**26**	31	29	**33**
Partnering to provide expertise and time as well as money (such as providing money and experts to build a smart phone APP)	**24**	25	22	**32**	**24**	**27**	**23**	**19**
An issue or cause that aligns to the business they are in (so a health insurance company supporting health causes)	**21**	22	21	25	21	22	19	21
Educate customers about a social issue but doesn't donate money (e.g. using their marketing channels to encourage people to wear sunscreen)	**16**	16	16	**20**	**20**	**17**	**18**	**11**
Raising funds from customers for the cause but not contributing their own money (e.g. tins in retail stores)	**11**	11	11	**14**	**16**	**12**	**9**	**7**
Raising funds from staff for the cause but not contributing their own money (e.g. helping staff to donate)	**9**	9	9	**15**	**11**	**8**	**11**	**4**

Notes:
1. Blue and red figures denote differences between segments shown that are statistically significant at the 95% confidence level.
2. Rounding occurs.

The findings here highlight that the community tends to be most impressed with companies or brands that go beyond just donating money into efforts that help to achieve a favourable or improved outcome for the cause where it is needed most. This is apparent from the two most nominated options:

– *Getting stuck in at the grass roots level, making things happen not just donating money (e.g. bullying prevention programs in schools)* – ranked in top 3 by 47%
– *Works to address the root of the problem not just band aiding (so eradicating homelessness not paying for swags)* – ranked in top 3 by 45%

The above options were the two most popular for males, females and people aged 25 plus. *Getting stuck in at grass roots level* was also the most favoured option for 18-24s but they ranked the second option above equal fourth overall.

Donating funds is important too. We see this in the three lowest ranked options (the underlining is ours, it was not part of the question):

– *Educate customers about a social issue but doesn't donate money (e.g. using their marketing channels to encourage people to wear sunscreen* – ranked in top 3 by 16%
– *Raising funds from customers for the cause but not contributing their own money (e.g. tins in retail stores)* – ranked in top 3 by only 11%
– *Raising funds from staff for the cause but not contributing their own money (e.g. helping staff to donate)* – ranked in top 3 by only 9%

Those three options were also the lowest ranked across the age groups and gender segments.

What Makes People Most Skeptical About Claims of Support for a Cause

Q3: *Listed below are various reasons why people like you, might be skeptical about companies or brands which claim to be supporting charitable, social or environmental causes. Please nominate which of these are most likely to make you sceptical in top 3 order?*

	Total sample (n=1,217)				
Reasons for skepticism about claimed support	1st choice %	2nd choice %	3rd choice %	In top 3 %	Not in top 3 %
They spend millions on TV advertising telling us about it	19	14	14	**47**	**53**
They provide no proof of what they have done – just empty claims	16	16	15	**47**	**53**
They don't or won't reveal how much money is actually being invested	11	12	12	**36**	**64**
They use the charity or cause to hook me in to get my personal information (e.g. $1 goes to charity if you fill out form)	10	10	11	**30**	**70**
They use complicated or vague language designed to baffle or confuse	9	10	10	**29**	**71**
Staff that work for the company don't know anything about what the company is doing for the charity or cause	8	9	8	**25**	**75**
Their support of the charity or project is clearly an attempt at fixing up wrongdoings when the wrongdoings continue on	7	5	8	**20**	**80**
They support social or environmental causes but then treat customers badly	6	7	6	**18**	**82**
They support social or environmental causes but then treat staff badly	6	7	6	**19**	**81**
They just give money but the management and staff don't get involved	5	4	6	**15**	**85**
They support the charity or project for less than 3 years – there is no long term commitment	3	6	5	**14**	**86**

Reasons for skepticism about claimed support (cont.)	Total In top 3 (1,217) %	Gender		Age				
		Male (600) %	Female (617) %	18-24 (136) %	25-34 (219) %	35-44 (234) %	45-54 (225) %	55+ (403) %
They spend millions on TV advertising telling us about it	**47**	48	46	**35**	**39**	**47**	**49**	**55**
They provide no proof of what they have done – just empty claims	**47**	**44**	**50**	43	46	48	**40**	**51**
They don't or won't reveal how much money is actually being invested	**36**	35	36	**29**	37	**31**	35	**40**
They use the charity or cause to hook me in to get my personal information (e.g. $1 goes to charity if you fill out form)	**30**	30	30	31	**24**	30	**35**	**31**
They use complicated or vague language designed to baffle or confuse	**29**	**32**	**26**	32	**25**	29	**34**	28
Staff that work for the company don't know anything about what the company is doing for the charity or cause	**25**	**21**	**29**	**34**	**24**	**20**	**24**	**26**
Their support of the charity or project is clearly an attempt at fixing up wrongdoings when the wrongdoings continue on	**20**	21	19	22	**23**	20	**22**	**17**
They support social or environmental causes but then treat customers badly	**18**	18	19	**16**	**23**	**23**	**19**	**13**
They support social or environmental causes but then treat staff badly	**19**	17	21	22	**23**	20	**16**	**16**
They just give money but the management and staff don't get involved	**15**	17	13	**20**	17	15	**13**	**12**
They support the charity or project for less than 3 years – there is no long term commitment	**14**	**17**	**12**	16	**19**	**17**	**11**	**11**

Notes:
1. **Blue** and **red** figures denote differences between segments shown that are statistically significant at the 95% confidence level.
2. Rounding occurs.

The answer to this question could be summarised as skiting and lack of proof.

By 'skiting' we mean *spending millions on TV advertising telling us about it.* This was mentioned in the top 3 by 47% as was *providing no proof of what they have done, only empty claims.* These were also the two most nominated options by gender and age group.

The two responses probably go hand in hand in that TV advertising is not necessarily proof of support. Furthermore as the previous section's results demonstrate, the community is most impressed by support provided at grass roots level.

Total sample details

	Total Sample (1,217) %
Gender:	
Male	49
Female	51
Age:	
18 – 24 yrs	12
25 – 34 yrs	19
35 – 44 yrs	19
45 – 54 yrs	17
55 – 64 yrs	17
65+ yrs	16
Work Status:	
Self-employed	6
Work full-time	32
Work part-time	16
Home duties	8
Retired on pension	17
Self-funded retiree	3
Student	8
Temporarily unemployed	9

	Total Sample (1,217) %
Occupation (if working):	*(656)*
Upper / Middle white collar	10
Lower white collar	61
Skilled blue collar	11
Semi / Unskilled blue collar	16
Refused	1
Lifecycle stage:	
Single, never married	28
Couple, no kids	13
Couple or single parent with kids at home	30
Empty nesters	18
Widowed / divorced / separated	9
Education:	
Secondary incomplete	10
Secondary completed	22
Trade qualification	13
Vocational certificate	9
Tertiary qualification	44
Refused	2

Total sample details (cont)

	Total Sample (1,217) %
Country of Birth:	
Australia	77
United Kingdom	6
USA or Canada	1
New Zealand	2
Asia	7
Europe	4
Africa	0
The Middle East	0
Elsewhere	2
Refused	1
NESB or ATSI Background:	
NESB	16
ATSI	1
Neither	83
Household Gross Income p.a.:	
< $30,000	15
$30,000 - $50,000	20
$50,000 - $75,000	18
$75,000+	34
Don't know	4
Refused	9

	Total Sample (1,217) %
Home Ownership:	
Own	46
Buying	12
Renting	31
Living with parents	8
Other	2
Household Size:	
One person	18
Two people	38
Three people	20
Four people	15
Five or more people	9
State:	
New South Wales	34
Victoria	26
Queensland	21
South Australia	8
Western Australia	11
Location:	
Metropolitan	64
Regional	27
Rural	9

Note: 0 = Less than 1%. Some refusals not shown. Rounding occurs

Questions Asked

*Now for some questions about **companies or brands supporting charitable, social or environmental causes. By 'social' here we mean 'society' not social media.***

Q1 There are many sources of information about what companies or brands are doing or not doing to support the community or protect the environment.

What sources of information would you trust the most to tell you about these sorts of things?

Please select all that apply.

(Order to be rotated)

Consumer organisations such as Choice	1
Information provided by charities or environmental groups	2
Editorials or stories in the media	3
Information on the product packaging	4
Information in the company's annual report	5
Information on the company's website	6
Advertising on TV	7
What you find out from friends or relatives	8
Information in the store or point of purchase	9
A special company social or environmental report	10
Advertising in newspapers or magazines	11
Direct mail or included in an account or bill	12
Radio advertising	13
Social media like Facebook	14
Outdoor posters	15
Don't know / can't say	D

Q.2 Listed below are various ways that companies or brands support charitable, social or environmental causes. In order, please nominate the three that you feel best demonstrate that the company or brand is genuine about supporting the charity or cause? ***(Order to be rotated).***

a) Firstly which of these do you feel is the most genuine way to demonstrate their support?

b) And which would you rank second?

c) And which would you rank third?

NOTE TO PROGRAMMER: For 2nd and 3rd choices only show remaining options

	First choice	Second choice	Third choice
i. Raising funds from customers for the cause but not contributing their own money (e.g. tins in retail stores)	1	1	1
ii. Raising funds from staff for the cause but not contributing their own money (e.g. helping staff to donate)	2	2	2
iii. Donating significant staff expertise to help a charity or cause become more efficient (e.g. building on-line programs)	3	3	3
iv. Getting stuck in at the grass roots level, making things happen not just donating money (e.g. bullying prevention programs in schools)	4	4	4
v. Partnering to provide expertise and time as well as money (such as providing money and experts to build a smart phone APP)	5	5	5
vi. Educate customers about a social issue but doesn't donate money (e.g. using their marketing channels to encourage people to wear sunscreen)	6	6	6
vii. Supports lots of charities or causes with small amounts of donations (e.g. lots of charities get $10,000)	7	7	7
viii. Supports a couple of charity/community partners with large sums of money and support (i.e. a big chunk of cash to a couple of charities)	8	8	8
ix. Works to address the root of the problem not just band aiding (so eradicating homelessness not paying for swags)	9	9	9
x. An issue or cause that aligns to the business they are in (so a health insurance company supporting health causes)	10	10	10
xi. Making a significant and tangible impact in one area to one issue (so focussing on environment or health or poverty rather than doing all 3)	11	11	11

Q.3 Listed below are various reasons why people like you, might be skeptical about companies or brands which claim to be supporting charitable, social or environmental causes. Please nominate which of these are most likely to make you sceptical in top 3 order? ***(Order to be rotated).***

a) Firstly which of these is most likely to make you skeptical of their claims?

b) And the second most likely to make you skeptical?

c) And third most likely to make you skeptical about their claims?

NOTE TO PROGRAMMER: For 2nd and 3rd choices only show remaining options

	First choice	**Second choice**	**Third choice**
i. They spend millions on TV advertising telling us about it	1	1	1
ii. They just give money but the management and staff don't get involved	2	2	2
iii. Their support of the charity or project is clearly an attempt at fixing up wrongdoings when the wrongdoings continue on	3	3	3
iv. Staff that work for the company don't know anything about what the company is doing for the charity or cause	4	4	4
v. They don't or won't reveal how much money is actually being invested	5	5	5
vi. They support social or environmental causes but then treat customers badly	6	6	6
vii. They support social or environmental causes but then treat staff badly	7	7	7
viii. They use complicated or vague language designed to baffle or confuse	8	8	8
ix. They support the charity or project for less than 3 years – there is no long term commitment	9	9	9
x. They provide no proof of what they have done – just empty claims	10	10	10
xi. They use the charity or cause to hook me in to get my personal information (e.g. $1 goes to charity if you fill out form)	11	11	11