

The background is a dark blue gradient with various geometric shapes. There are several vertical bars of different heights and colors (dark blue, light blue, orange, pink) that resemble a bar chart. A large, semi-transparent globe is positioned in the center-right, with several small orange and blue cubes floating around it. A thin white line curves across the middle of the image. A solid red circle is located in the upper left quadrant.

# SEC Newgate *ESG Monitor.*

France, Germany & Italy Report

2021 RESEARCH FINDINGS



# Summary.

## Background & Methodology

SEC Newgate conducted research to understand community awareness and perceptions around Environmental, Social and Governance (ESG) issues.

The research involved a 15-minute online survey conducted with a total sample of n=10,203 across 10 countries: Australia, China, Colombia, France, Germany, Italy, Japan, Singapore, UK, USA.

This report presents the findings from **France, Germany, Italy** (Europe n=3,030). Where relevant, results have been compared to the 'global result' i.e. for all 10 countries included in the study.

Participants were sourced from global panel provider PureProfile. Fieldwork was conducted between mid and late August 2021. Quotas were set by age, gender and location to ensure a nationally representative sample. The final results were weighted by the actual age and gender proportions in Europe.

Other methodological notes:

- Survey questions and sample sizes are shown at the bottom of each page
- Results may not always total 100% due to rounding or multiple-response questions
- Down ▼ and up ▲ arrows show where results for this country are significantly lower / higher than all other countries combined (95% confidence level).

## Key Findings for Europe (France, Germany & Italy)

- **Six in ten people in Europe** (62%) say they are strongly interested in the environmental, social and governance behaviour of government and corporates (rating it 7 or more out of 10 in importance to them). Just under half (48%) say ESG issues influence their purchase decisions.
- **Climate and environment dominates the ESG agenda** in Europe. When asked about the one ESG issue they feel is most important for the government or companies in their country to focus on, 57% mentioned something related to the environment – higher than the global result of 52%. **Climate change** was the biggest issue (mentioned by 26%), followed by environmental issues in general (12%) and pollution (9%).
- **Not-for-profit organisations scored highest for ESG performance** ratings (6.1 out of 10 on average), followed by companies (5.5) and then individual people (5.5). **Government was rated the lowest overall** with 27% giving a rating less than 5 and an overall average of 5.3.
- When it comes to performance on specific ESG performance metrics, companies were rated higher than government. **Both received the highest ratings for social metrics.** For example, governments had the highest average ratings for promoting and protecting basic human rights and ensuring services are accessible to everyone who needs them. For companies in Europe, the highest ratings were for ensuring accessibility to products and services, listening to customers and taking their views into account and promoting equality and diversity in the workforce.
- By industry, **healthcare, technology as well as education and training received the highest average ratings** in terms of acting responsibly on ESG issues. The chemical and airline industries received the lowest ratings. ESG ratings in Europe were significantly lower than the global average for all industries.
- The majority of participants in Europe agreed that **companies need to do more to give back to the natural environment (77%)**, and that they should take responsibility for their supply chains (77%). Three quarters also agreed that companies need to do more to look after their employees (76%).

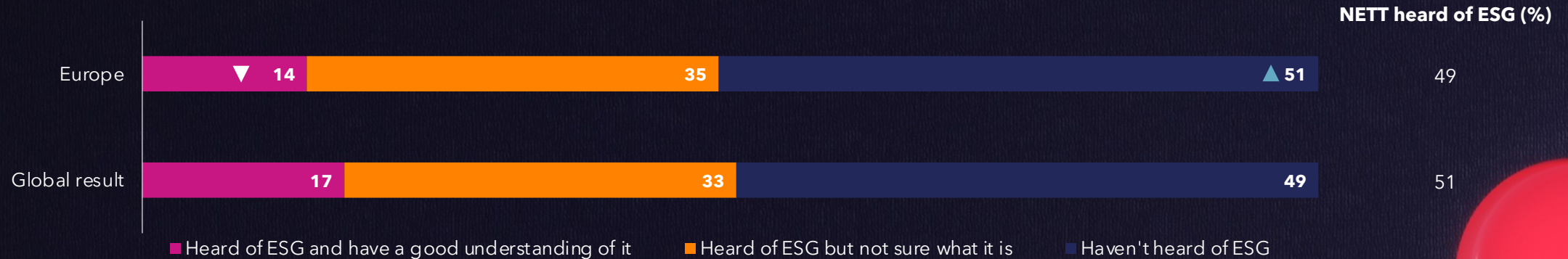


# Awareness and knowledge of ESG.

Just over six in ten participants from Europe had a strong interest in environmental, social and governance issues (62% rated 7 or more out of 10) with 48% saying it is an important consideration when deciding to purchase products or services from specific companies (rating 7+).

Just under half (49%) had heard of the term ESG without being prompted, with 14% saying they had a good understanding of it – significantly lower than the global result (17%).

## Unprompted awareness of ESG (%)



*After being prompted with a definition of what ESG is...\**

**62%** say they are very interested in ESG issues (rating of 7+ out of 10)

**48%** say ESG issues are very important when deciding whether to purchase products / services (rating 7+ out of 10)

Base: All participants in Italy, France and Germany (n=3,030); All survey participants (n=10,203) \* see full report for definition Q3. Before today, had you heard of the term "ESG" which stands for "Environmental, Social and Governance (ESG)"?

Q4. How interested are you in Environmental, Social and Governance (ESG) issues, if at all? 0=not at all interested, 10=extremely interested

Q10. In your day-to-day life how important are ESG issues in influencing whether you decide to purchase products or services from specific companies? 0=not at all important, 10=extremely important

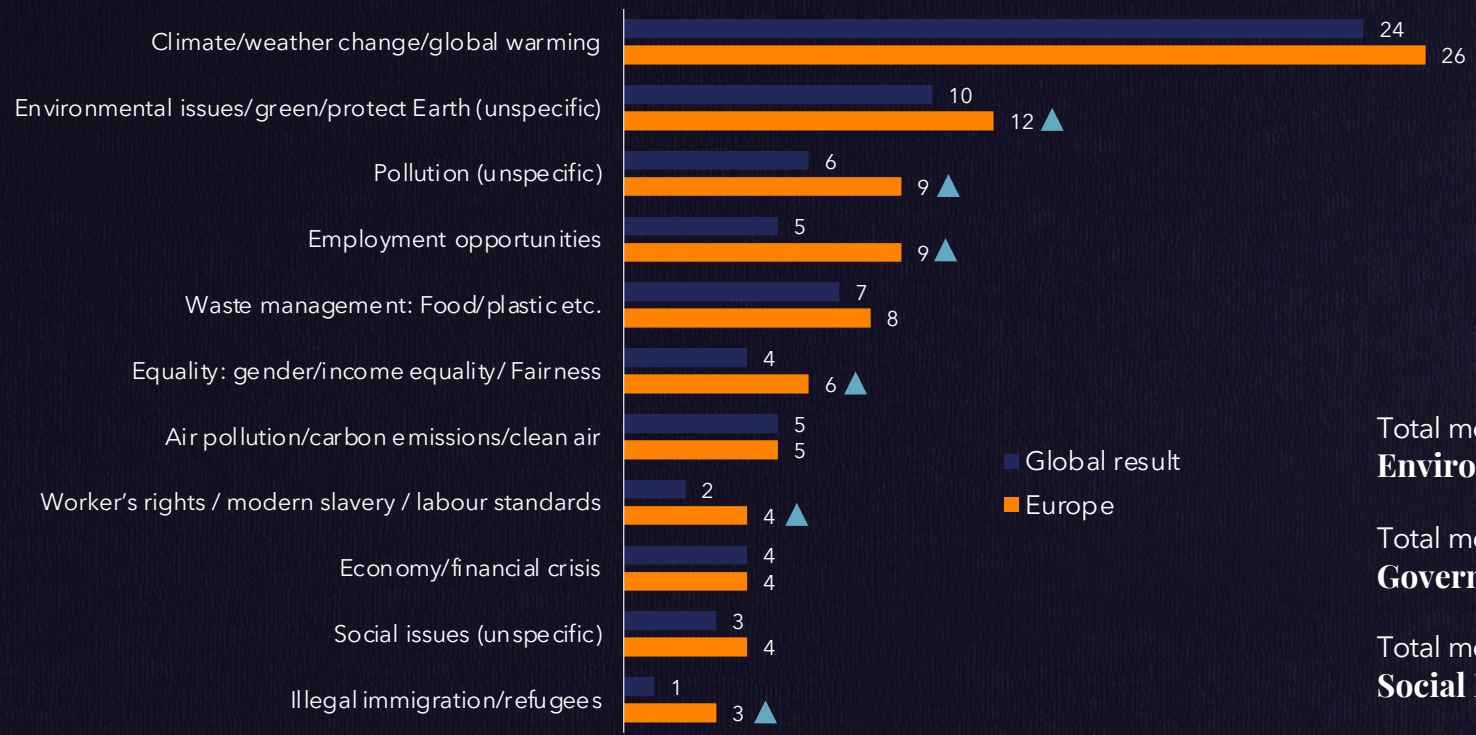


# Most important ESG issue to focus on.

When asked an open-response question about the one ESG issue they feel is most important for the government or companies their country to focus on, **climate change** was the clear front-runner (26%).

This was followed by environmental issues in general (12%), pollution (9%) and employment opportunities (9%). In total, environmental considerations were cited in 57% of all responses – significantly more than the global average of 52%.

Most important ESG issues for Government or companies to be focussing on (%)



Total mentions of **Environmental Issues: 57%**

Total mentions of **Governance Issues: 33%**

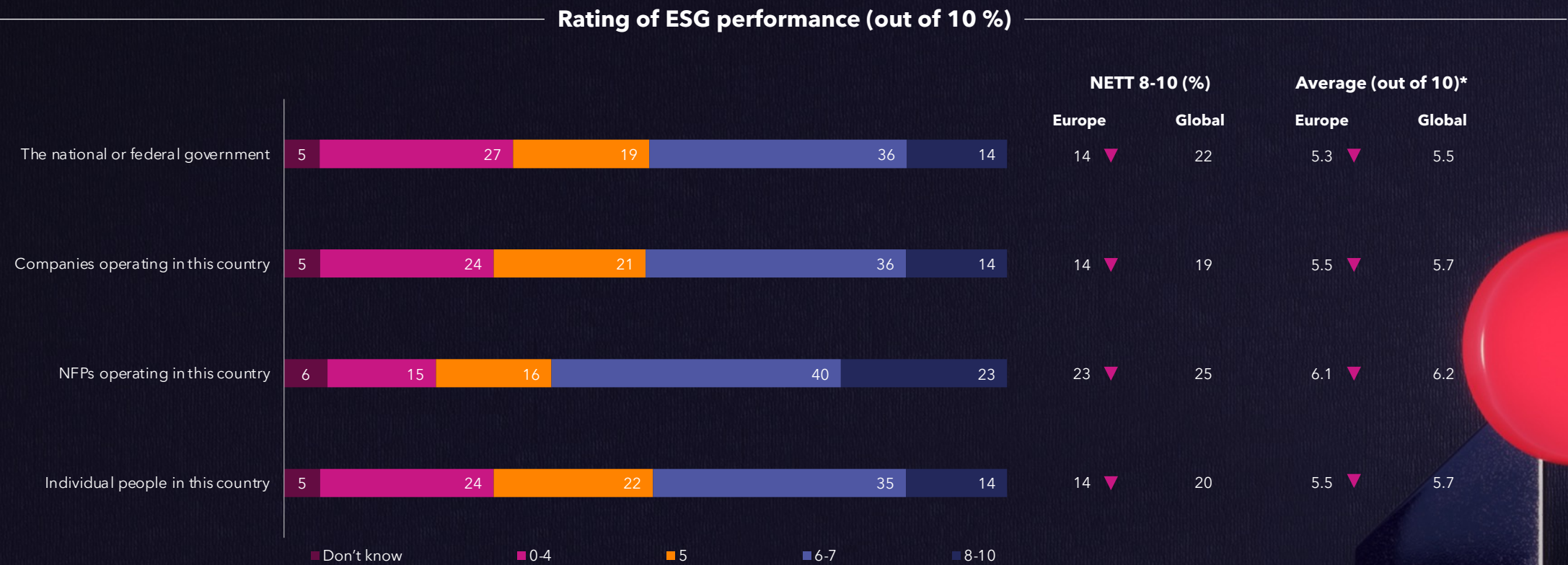
Total mentions of **Social Issues: 25%**

Base: All participants in Italy, France and Germany (n=3,030); All survey participants (n=10,203); Top 10 codes responses for Europe shown.  
Q5. What is the one Environmental, Social or Governance issue that you think is most important for the government or companies in [INSERT COUNTRY] to be focusing on?

# Rating of *ESG performance*.

When it came to ratings of ESG performance in Europe, the not-for-profit organisations received the highest ratings (6.1 out of 10 on average), followed by companies (5.5) and individual people (5.5).

The government rated the lowest overall with 27% giving a rating less than 5 and an overall average of 5.3. Results for Italy, France and Germany combined were significantly lower than the global averages.



Base: All participants in Italy, France and Germany (n=3,030); All survey participants (n=10,203) \* Average scores exclude those who said 'don't know'  
Q6. Overall, how would you rate the performance of the following groups when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues?



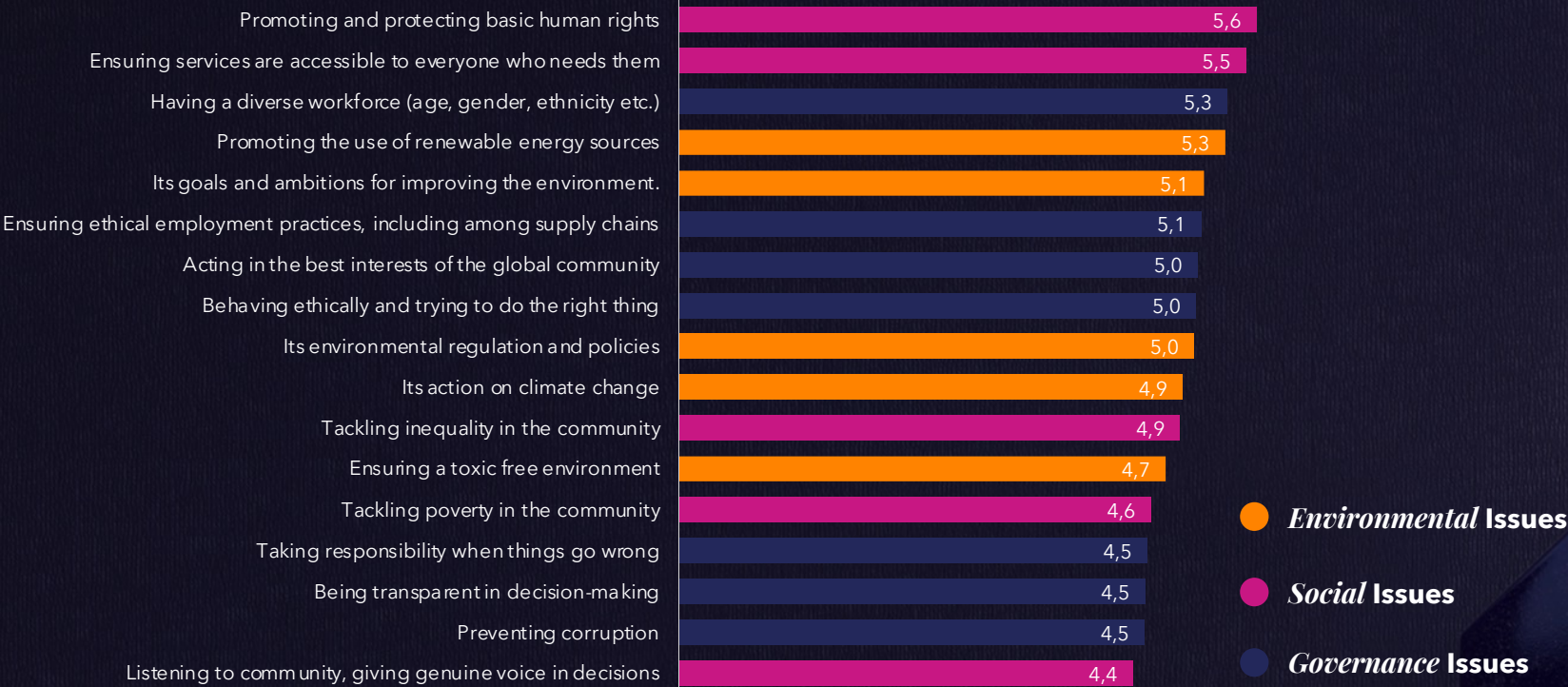
# Government performance on specific ESG issues.

Participants were asked to rate their Government on specific environmental, governance and social metrics. The average ratings across Europe tended to be between 4 and 6, potentially reflecting a lower level of knowledge and understanding of the issues.

The highest performing areas were **social issues**:

- promoting and protecting basic human rights and
- ensuring services are accessible to everyone who needs them.

## Average performance (out of 10) - Europe



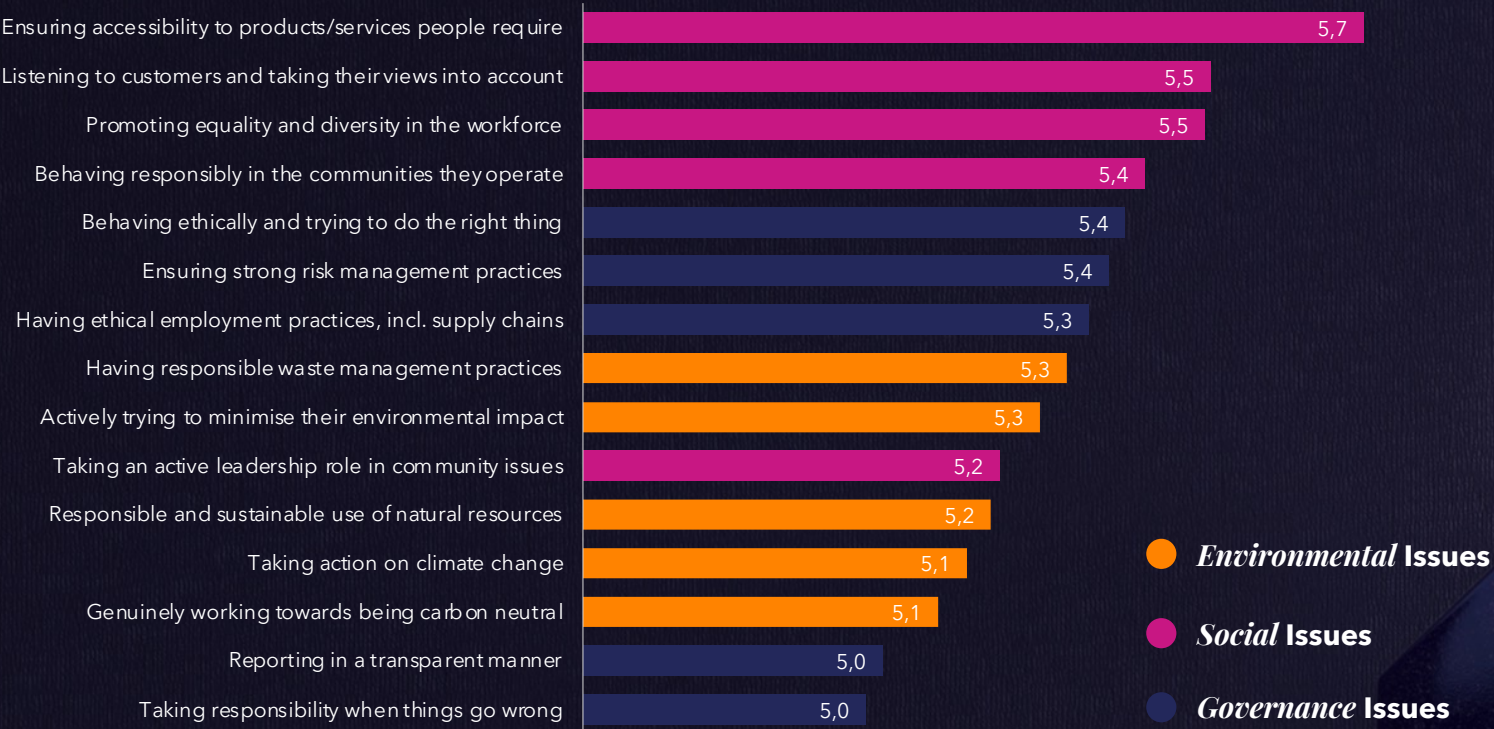
Base: All participants in Italy, France and Germany who gave a rating between 0 and 10 (n=2,839-2,941)  
Q12. How would you rate the performance of the [NATIONALITY] Government on the following things?

# Company performance on specific ESG issues.

Participants were also asked to rate their Companies on specific environmental, governance and social metrics. The average ratings provided for companies were slightly higher than those provided for government.

The highest performing areas were social issues: ensuring accessibility to products and services, listening to customers and taking their views into account and promoting equality and diversity in the workforce.

## Average performance (out of 10) - Europe



Base: All participants in Italy, France and Germany who gave a rating between 0 and 10 (n=2,783-2,899)  
Q13. And how would you rate the performance of companies in general in [INSERT COUNTRY] on the following things?



# Who is *doing well* in the ESG space?

Participants were asked to say which individual companies, industries, countries or individuals were doing really well when it comes to ESG issues and which were doing very badly.

In Europe, Sweden (9%), Amazon (9%), Germany (6%) and Norway (6%) were seen to be doing particularly well.

37%  
say they 'don't know'

9%  
say they 'none'

Doing well in the ESG space (%)



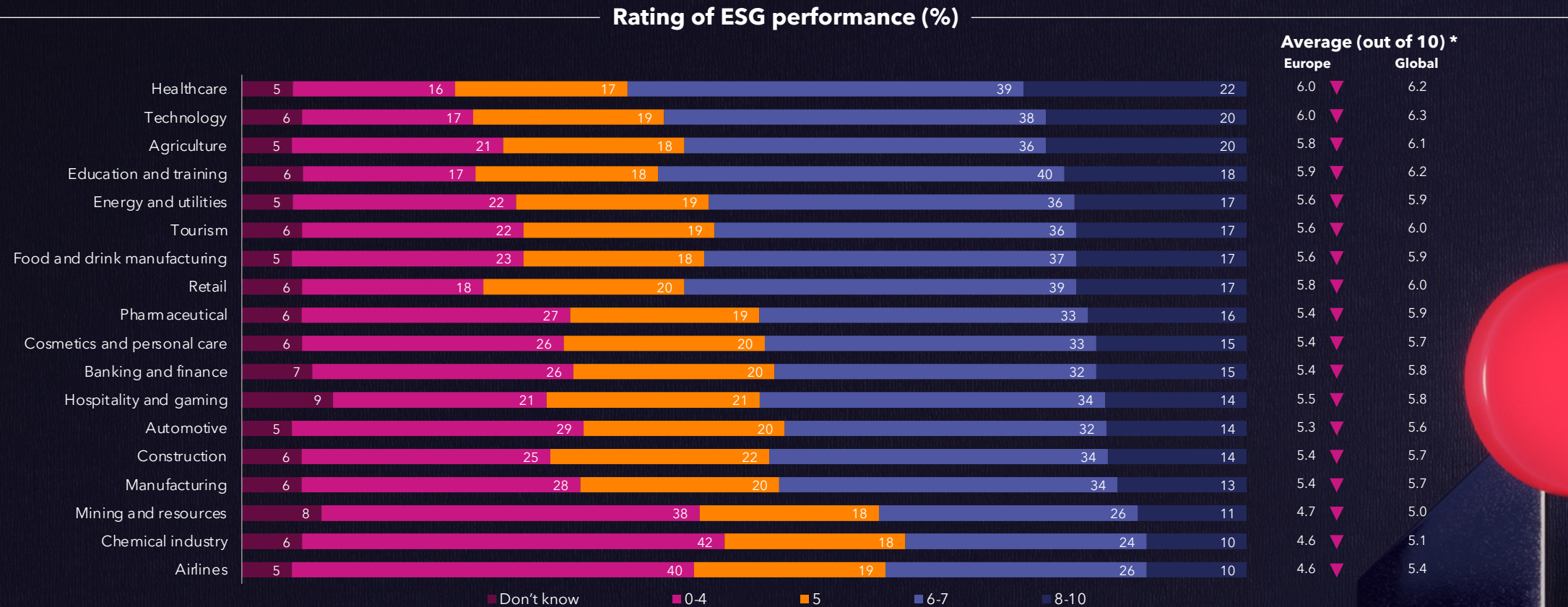
Base: All participants in Italy, France and Germany (n=3,030); Top 10 coded responses for Italy, France and Germany are shown.  
Q8. Which individual companies, industries, countries or individuals do you think are doing really well when it comes to Environmental, Social and Governance (ESG) issues? List all that apply



# Industry performance ratings.

When prompted with a list of industries, healthcare, technology as well as education and training received the highest average ratings in terms of acting responsibly on ESG issues.

The chemical and airline industries received the lowest ratings. ESG ratings in Europe were significantly lower than the global average for all industries.



Base: All participants in Italy, France and Germany (n=3,030); All survey participants (n=10,203) \* Average scores exclude those who said 'don't know'  
Q11. How would you rate the performance of the following industries operating in [INSERT COUNTRY] when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues?

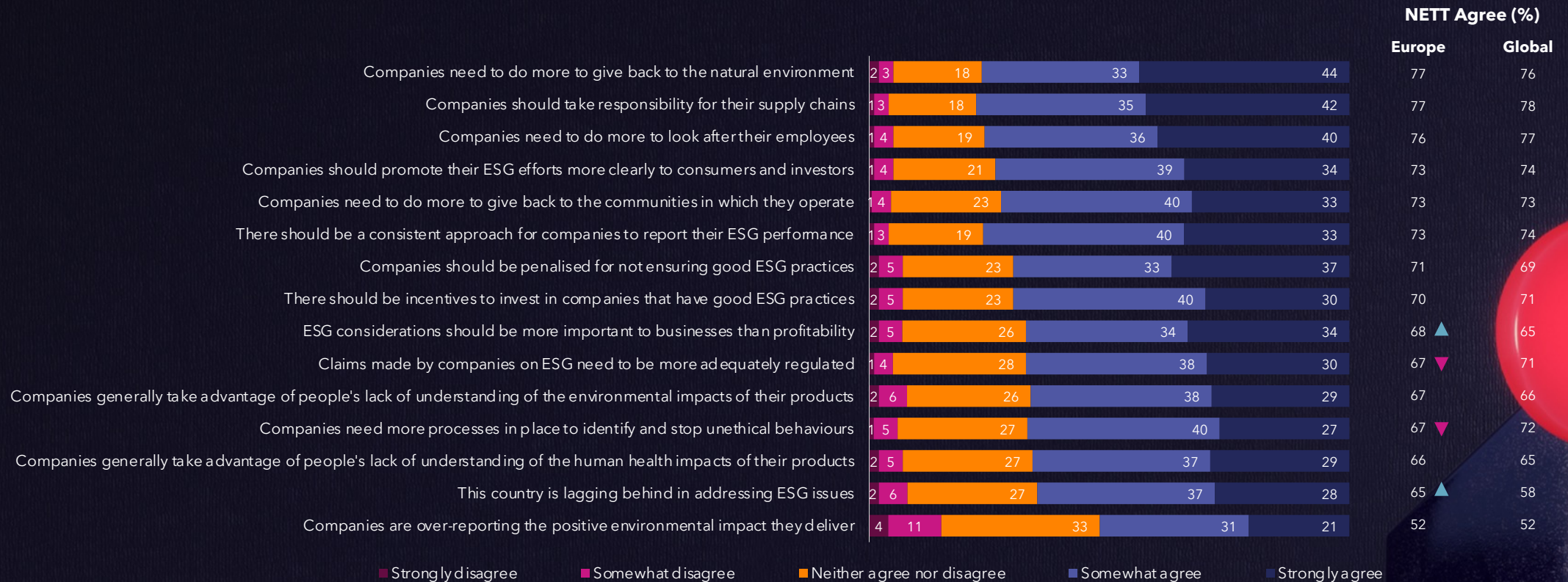


# Attitudes to ESG.

Participants in Europe had fairly strong views towards ESG issues with a large majority agreeing that companies need to do more to give back to the natural environment (77%), and that they should take responsibility for their supply chains (77%).

Three quarters also agreed that companies need to do more to look after their employees (76%). Those in Europe were notably more likely to agree that their country was lagging behind in addressing ESG issues (65% vs. 58% globally).

## Attitudes to ESG issues (%)

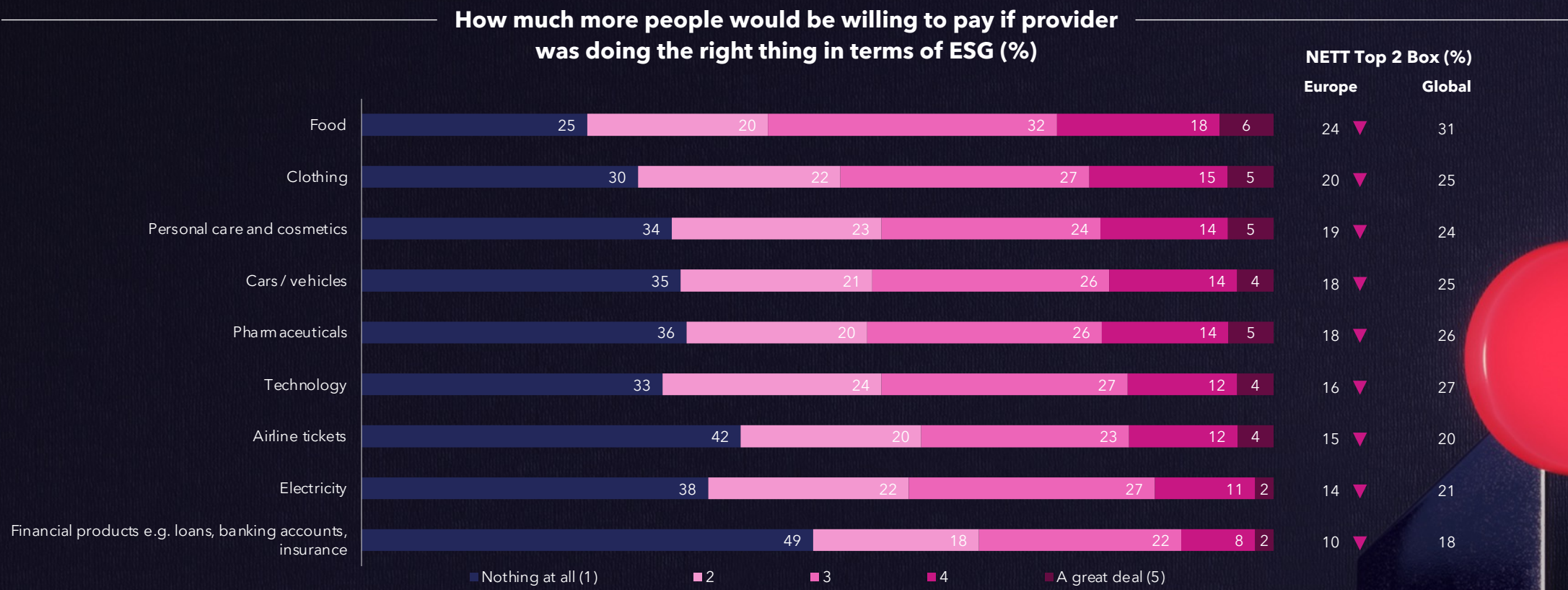




# Willingness to pay for higher ESG performance.

**Willingness to pay for ESG performance for a range of different products and services was fairly divided.** Participants said they would be willing to pay much more for food (24%), clothing (20%) or personal care and cosmetics (19%).

When it came to financial products, just one in ten (10%) were willing to pay more if they knew the provider was doing the right thing in terms of ESG issues.



Base: All participants in Italy, France and Germany (n=3,030); All survey participants (n=10,203)  
Q14. How much more would you be willing to pay, if anything, for the following products and services if you knew the provider was doing the right thing in terms of Environmental, Social and Governance (ESG) issues? SLIDER SCALE RANGING FROM NOTHING AT ALL TO A GREAT DEAL MORE





*Thank you.*

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