



GlobeScan Radar 2013

GlobeScan Webcast:

Global Business, Trust and Society

27 June 2013

GLOBESCAN

evidence and ideas. applied

GlobeScan Presenters



Chris Coulter

President



Caroline Holme

Director, Brand

Webinar Agenda

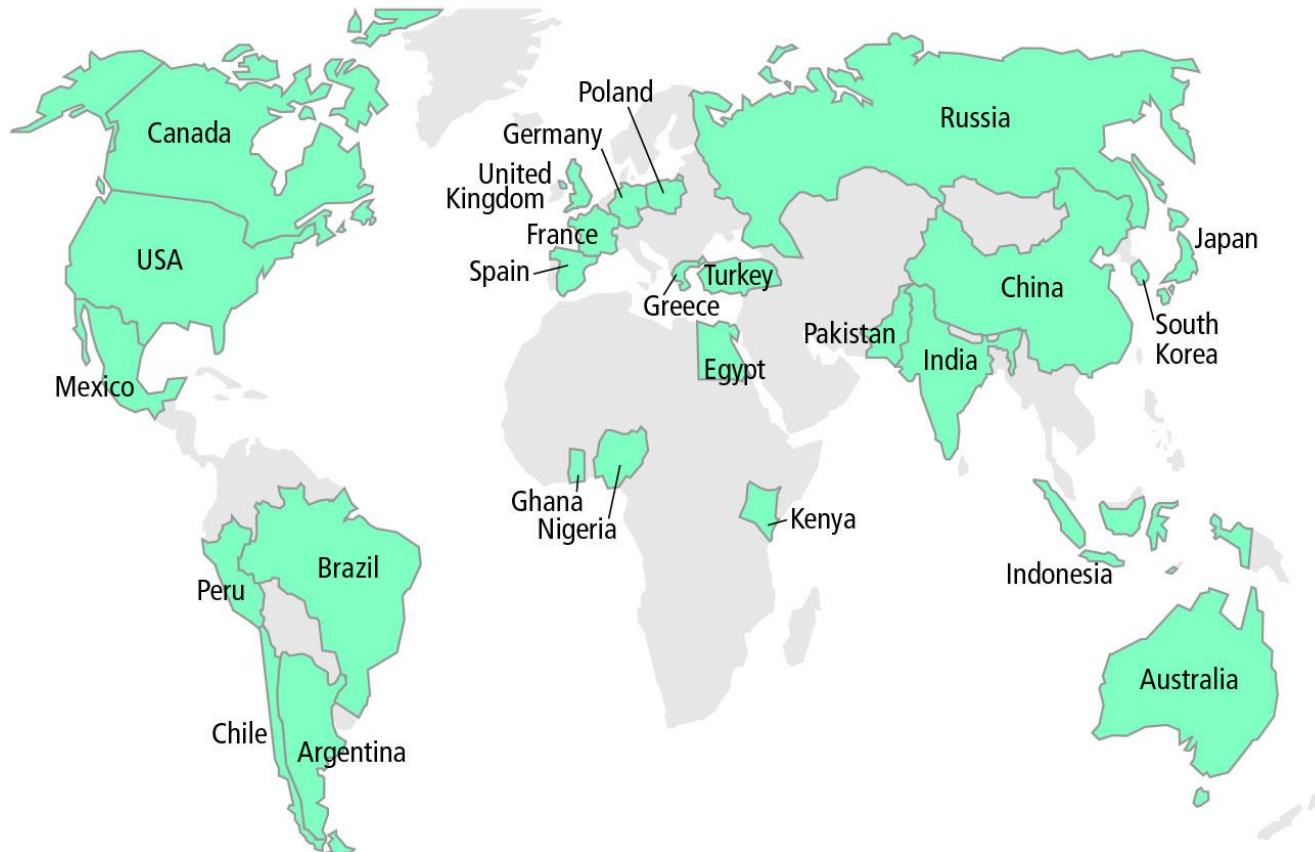
Current State of Play

- Introduction
- Key Societal Trends:
 - Trust - up
 - Performance ratings - stabilizing
 - Consumer response - stuck
- Leadership

Business & Society Framework: *Brings GlobeScan 'Inside'*



Participating Countries
2013



- Representative samples of 1,000 adults per country in 26 countries ($n=27,312$)
- Some urban-only surveying in certain developing countries
- Face-to-face and telephone interviewing between December 2012 and April 2013
- Within-country sample error of ± 2.8 to 4.9 per cent, 19 times out of 20.
- All figures in the charts are expressed in percentages, unless otherwise noted.

2013 Survey Topics

Trust In Institutions

- *Rating trust in 7 institutions: national government, national companies, global companies, NGOs, press and media, scientists/academia, UN*
- *Identifying trustworthy companies*

Expectations and Views of Companies

- *Roles of large companies in society*
- *Power of consumers to affect CSR behaviour*
- *Role of government in regulating CSR*
- *Employee motivation and loyalty resulting from active CSR initiatives*

Ethical Consumerism

- *Purchasing power of consumers to affect the way companies operate*
- *Consumer purchasing habits that affect society and the environment*
- *Rewarding/punishing socially responsible/irresponsible companies*
- *Social media chatter about environmental and social issues/causes*

Communicating Responsibility

- *Effectiveness of corporate communications around CSR and environmental initiatives*
- *Source of public awareness of CSR and environmental initiatives*

Rating Companies

- *Rating social responsibility in 16 industry sectors: banks/finance, oil/petroleum, auto, clothing/apparel, chemical, IT/computer, beer, alcohol, tobacco, food, pharmaceutical, mining, telecommunications, energy, media/entertainment, grocery /supermarkets*
- *Identifying socially responsible/irresponsible companies*

Environment and Climate Change

- *Seriousness of environmental problems: air, water, biodiversity, climate, auto emissions, GMOs, etc.*
- *Ways to solve climate change*
- *Personal lifestyle choices to reduce environmental impacts*
- *Role of technology in addressing climate change*

Context is everything

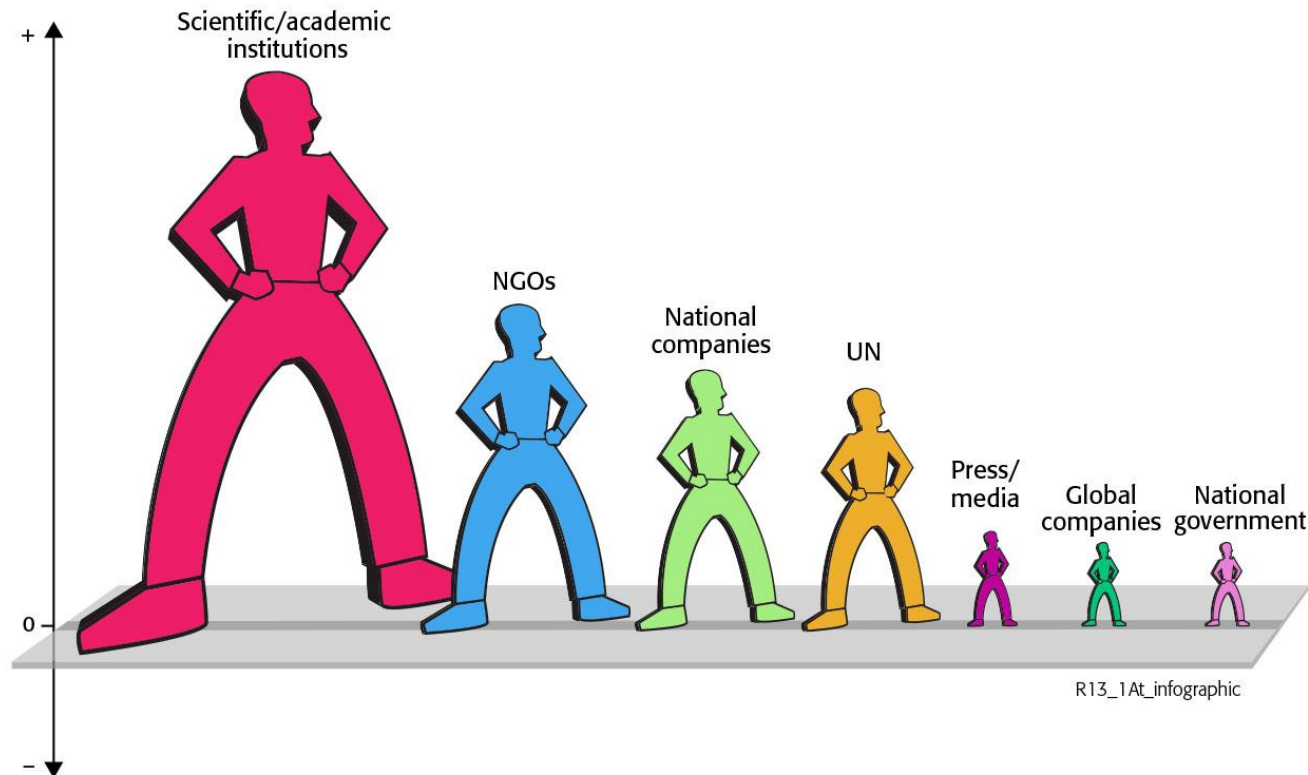
1. **Trust is on the move:** trust is up across institutions, including business
2. **Sector reputation stabilizing:** after a decade of decline, perceived performance of key sectors are stabilizing
3. **Ongoing pressure:** growing expectations for both responsible business & regulation
4. **Consumer activation:** consumers remain stuck and need to address demand-side of sustainable development
5. **Recognized leadership:** time is right to build integrated sustainability strategies that mobilize stakeholders internally and externally

1. A Trust Rebound

Trust in business is up globally and highly intertwined with responsibility

Scientific/academic institutions highly trusted

Net Trust* in Institutions Average of 23 Countries,** 2013



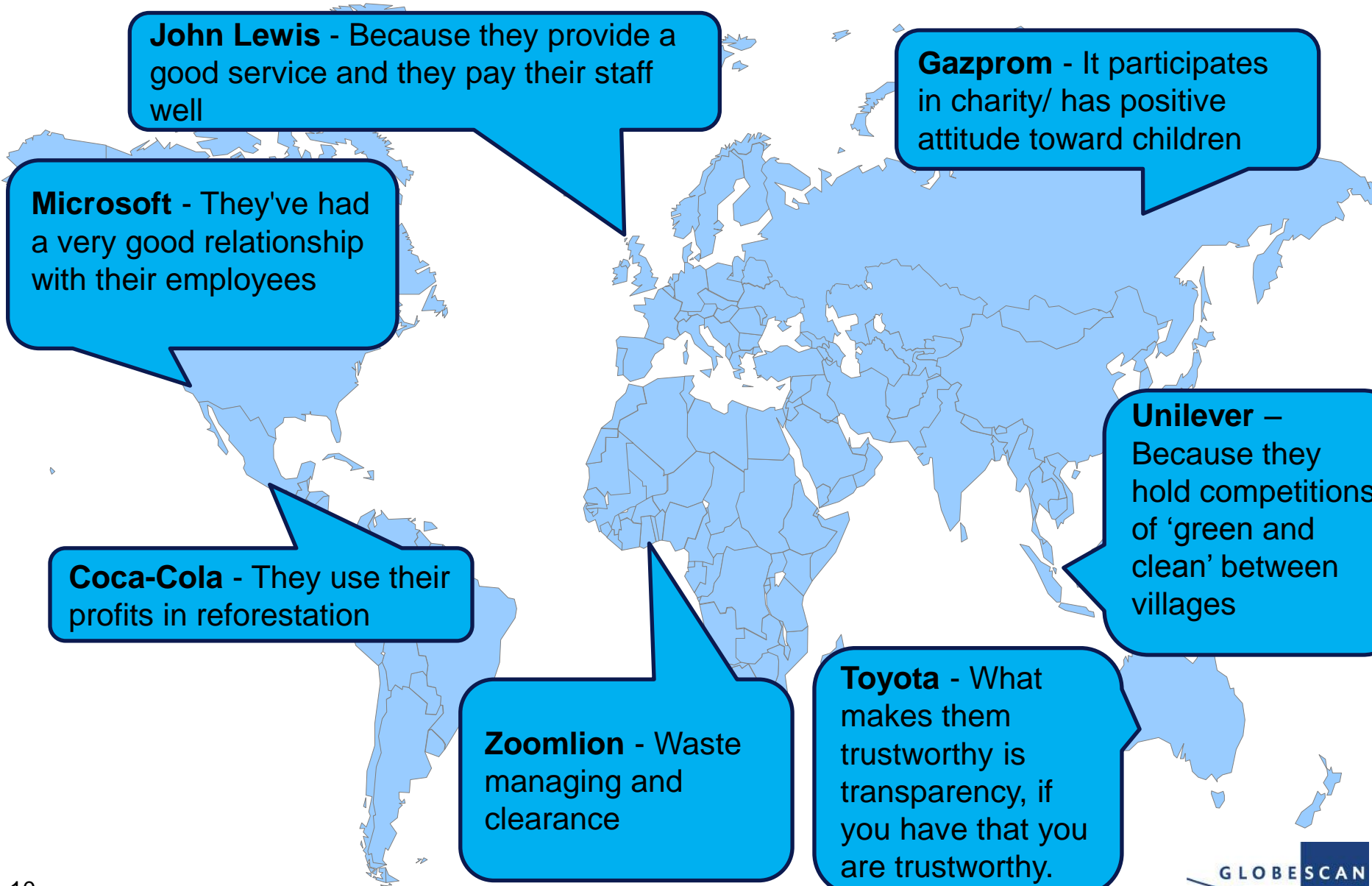
*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

**Includes Australia, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA

Most trusted companies



Why companies are trusted



John Lewis - Because they provide a good service and they pay their staff well

Gazprom - It participates in charity/ has positive attitude toward children

Microsoft - They've had a very good relationship with their employees

Coca-Cola - They use their profits in reforestation

Unilever - Because they hold competitions of 'green and clean' between villages

Zoomlion - Waste managing and clearance

Toyota - What makes them trustworthy is transparency, if you have that you are trustworthy.

Why companies are distrusted

BP - After the disaster, oil leak, they tried to get out of it, and later had to generate a PR agenda, just to clear their name.

H&M - With honest work you cannot offer those prices. I think they promote/use child labour.

Gazprom - Prices are going up all the time. With natural resources which our country possesses, each person could be a millionaire

Peugeot - Thinking more capital than workers

Walmart - It is absolutely horrible to its employees.

Ripley - Exploits their employees / pays low salaries

Safaricom - It steals from the public through hidden charges

Sanlu - Babies have been poisoned by its milk powder

Lapindo Brantas - Damaging the environment

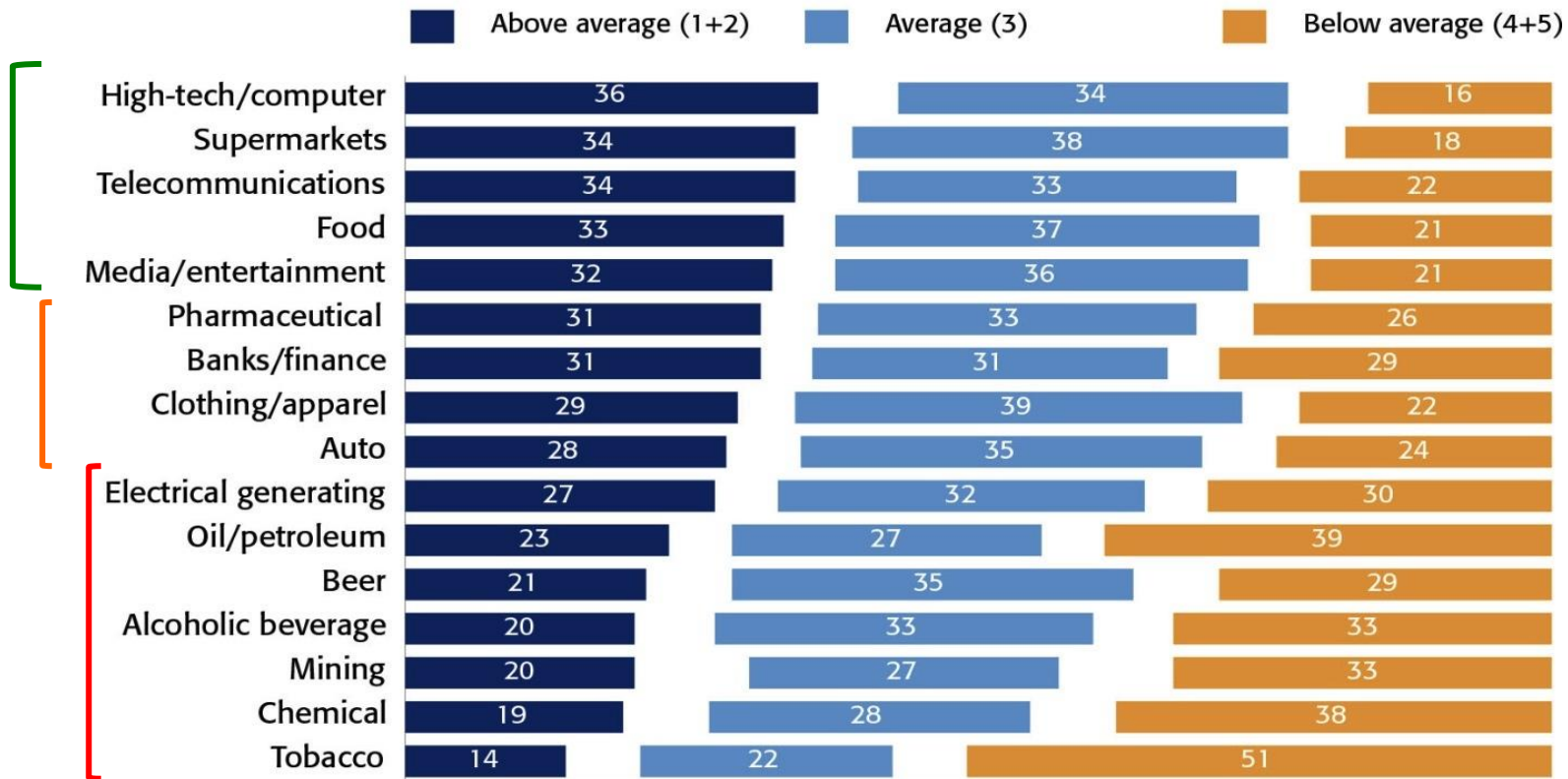
2. Sector Ratings:

The end of a decade long decline in reputation?

Technology, food, and entertainment viewed as most responsible sectors

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013

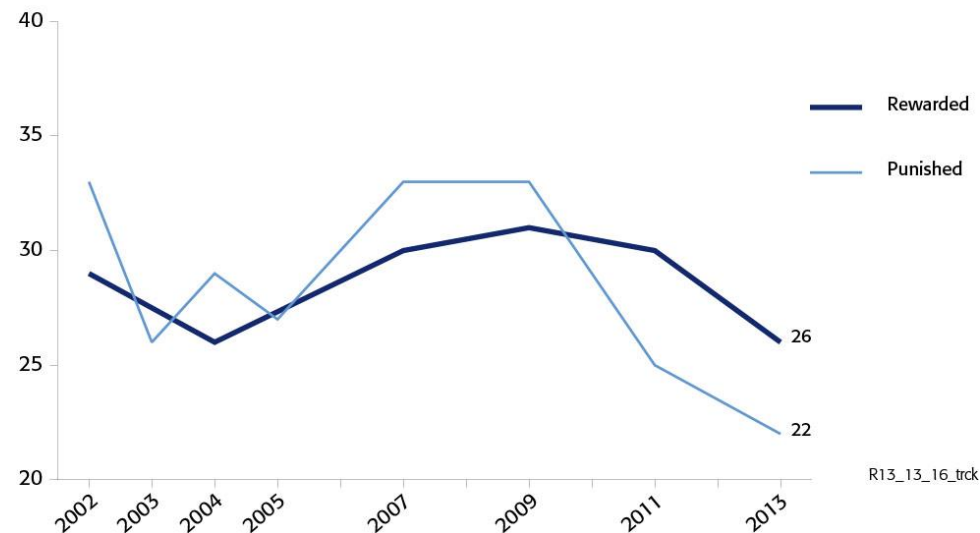


3. Consumers are Stuck: Activating demand

A short history of ethical consumerism

- Decade long stability in 'rewarding' companies (declining trend in punishing companies)
- Chicken and egg dynamic between companies and consumers
- Trying to cobble together a critical mass of green consumers
- But this segment doesn't see business as solution and they don't like consuming!

Have Rewarded/Punished Companies Seen as Socially Responsible/Irresponsible
Average of 14 Tracking Countries,* 2002–2013

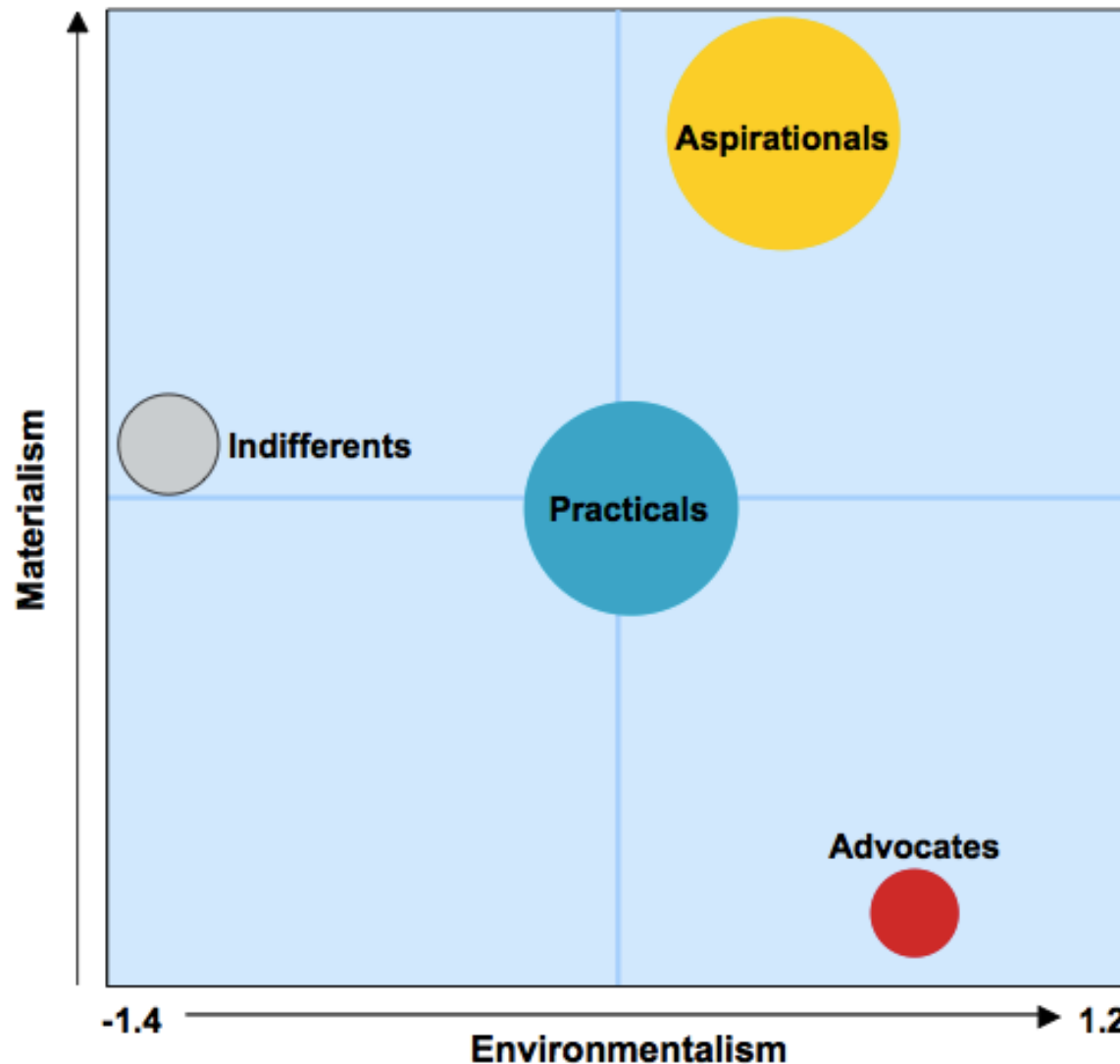


*Includes Australia, Brazil, Canada, Chile, China, France, Germany, Mexico, Nigeria, Russia, Turkey, UK, and USA



MEET THE ASPIRATIONALS

■ CONSUMER SEGMENTATION



Recap

- Progress on enabling context
- Consumer opportunity exists
- Need to mobilize progress at greater speed and scale
- Now...to the issue of leadership

4. Leadership:

Which companies are breaking through and why?

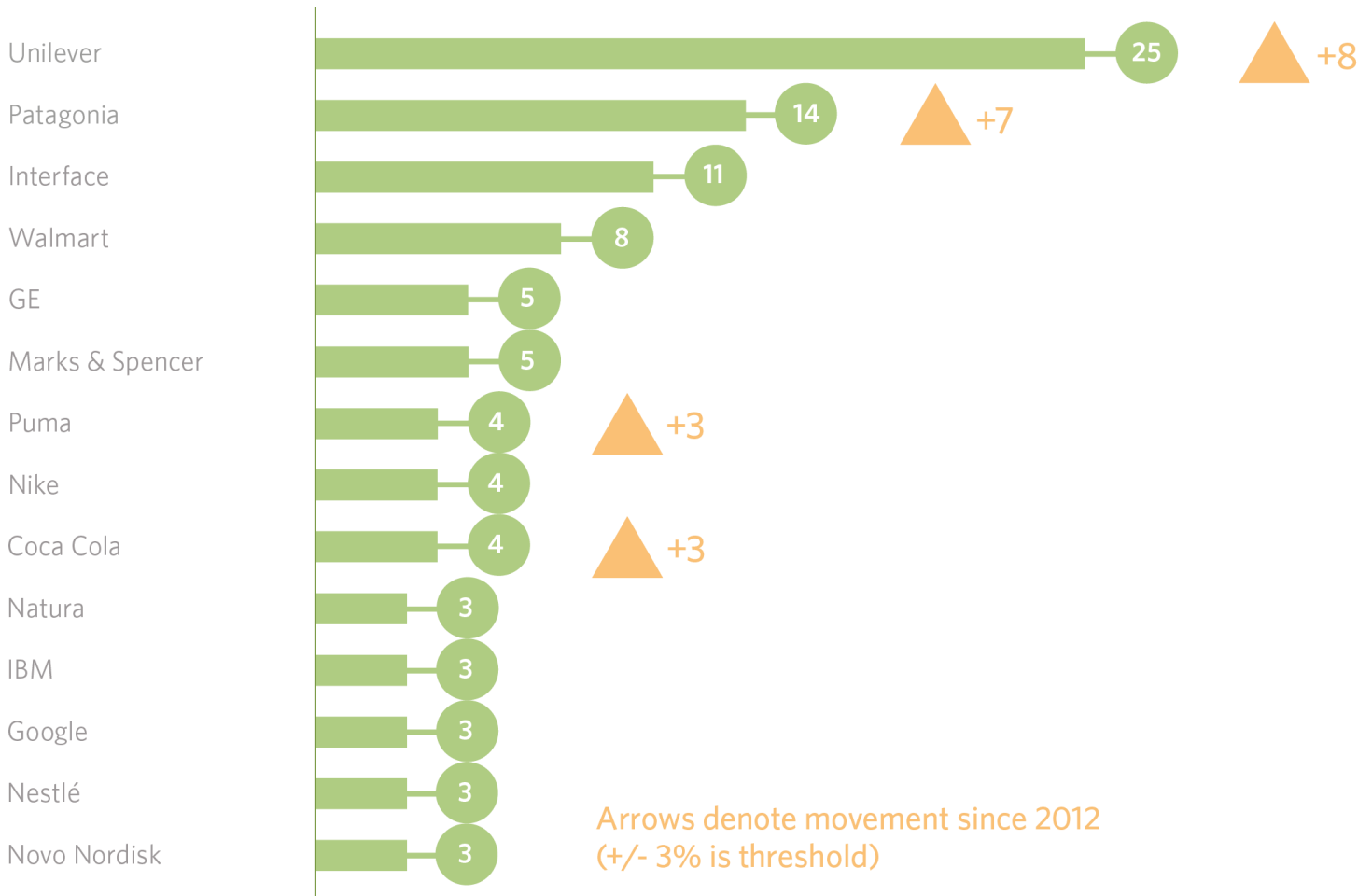
The 2013
*Sustainability
Leaders*
A GlobeScan/SustainAbility Survey

The 2013 Sustainability Leaders

While corporate leadership continues to be regarded poorly, Unilever is a bright spot, capturing the #1 position for the third year in a row.



% of Total Mentions, All Respondents, 2013



The 2013 Sustainability Leaders

Branded sustainability platforms and frameworks appear to be instrumental in gaining recognized leadership



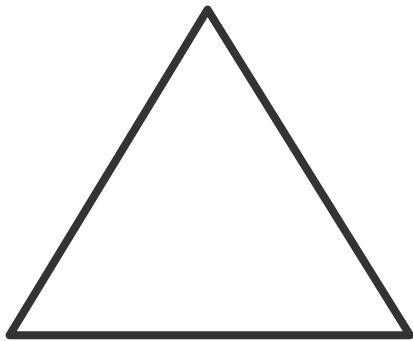
% of Total Mentions, All Respondents, 2013



The 2013 Sustainability Leaders

Vision & Strategy

- Big idea: aspirational vision
- Ambitious galvanizing goals
- Business and sustainability strategy alignment



Integration & Performance

- Targets & metrics
- Programs & initiatives
- Embedded across business

Engagement & Communications

- Transparency
- Dialogue and collaboration
- Branded platform

Unilever – a leadership case study



SUSTAINABLE LIVING LAB

Join the 24-hour global dialogue

HOME | ABOUT | SCHEDULE

MY PROFILE LOG OUT

TIME REMAINING: 17:40

FACILITATED BY

SUSTAINABLE LIVING LAB

Join the global dialogue

HOME | ABOUT | SCHEDULE | MY PROFILE | LOG OUT

✓ You've logged in as **Oliver Martin, Canada**. You can [upload an avatar photo](#), [update your account](#) or [proceed below](#).

WELCOME TO THE SUSTAINABLE LIVING LAB

Over the next 24 hours, within four themed zones, we'll be hosting live online dialogue or [full schedule](#) and click on the topics below to

HOW DO WE HELP PEOPLE LIVE SUSTAINABLY?

We have committed to halving the water, waste and greenhouse gas impacts across the lifecycle of our products. But we are finding it particularly challenging in helping consumers to reduce their environmental impacts when they cook, wash and clean with our products.

We believe there is a real opportunity to unlock solutions from all around the world and learn more from each other.

And that's where you come in.

Share your insights and help us move forward or click on the topics below to join the

BT.com UK Large business & public sector BT Group

Home Session One Session Two Session Three About the Forum Content Contact Us BT Better Future

Countdown to Event

5 DAYS 22 HRS 58 MINS 11 SECS

Session One JULY 02

Living within our planet's resources

Session Two JULY 02

Making business a Net Positive contributor

Session Three JULY 02

From definition to delivery

Add all to calendar JULY 02

Facilitated by

Better Future Forum

The Better Future Forum is bringing together some of the world's leading thinkers to explore and share what those at the cutting edge are doing to bring about the circular economy and achieve 'net positive' environmental, social and financial impacts.

[Sign in](#)

Not yet registered to participate?

BT and GlobeScan would like to invite you to join other experts from around the globe in our online conversation on 2nd and 3rd July. Please visit our registration page to enter your details. You can also sign in using your social media accounts and help spread the word online.

[Sign me up](#)

Latest Updates

BT Let's Talk @btlestalk 1m

2 and 3 July is the #BetterFutureForum and you can register here to join [buff.ly/1chFH4n](#)

Sian Wynn-Jones @sian_wj 29m

@jasonmarkwebb: both forum & future looking good thanks - esp if peeps join in & crowdsource thoughts at #betterfutureforum

[Forward to a friend >](#)

g+ t in f

SYSTEMS ROOM 10:00 - 11:00 BST

Systems Room - Reducing packaging waste

[JOIN THE CONVERSATION >>](#)

WHAT IS HAPPENING?

SUSTAINABLE SOURCING

CURRENT DISCUSSION: Consumer Engagement

[JOIN THE DISCUSSION >](#)

SUSTAINABLE PRODUCT DISTRIBUTION

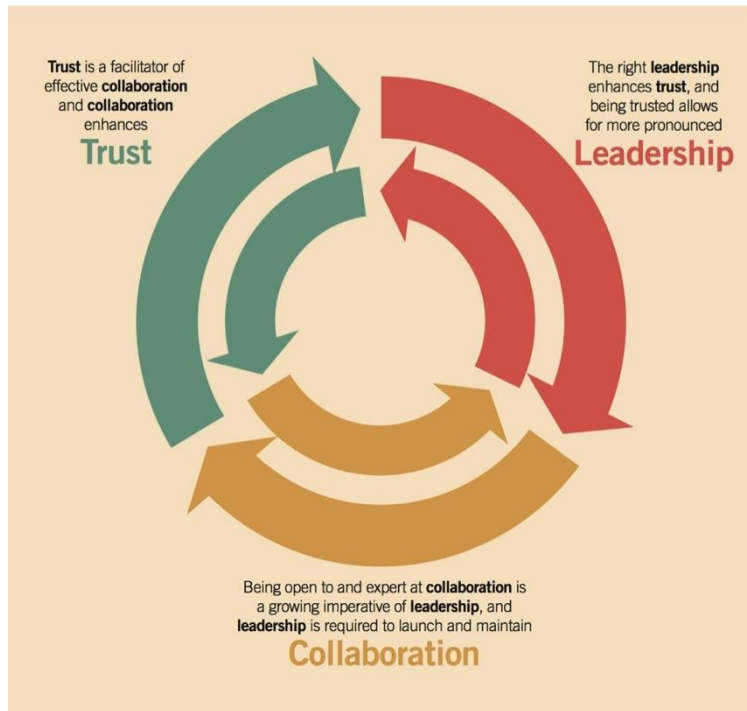
CURRENT DISCUSSION: Reducing GI Manufacturing Distribution

[JOIN THE DISCUSSION >](#)

Time to Deliver: 'Fierce Commotion'

Time to Deliver: 'Fierce Commotion'

- Creating an enabling context: TLC



Time to Deliver: ‘Fierce Commotion’

- Creating an enabling context: TLC
- Help wanted: ‘extended leadership’



1 Vision
Focus + Inspire

4 Brand
Connect + Engage

2 Goals
Define + Motivate

5 Transparency
Inform + Influence

3 Offer
Innovate + Demonstrate

6 Advocacy
Lead + Mobilize

Check out: Changing Tack



www.ChangingTackReport.com

Questions, comments, suggestions?

- Please contact us to schedule your customized briefing and analysis?

For more information, please contact:

Chris Coulter - chris.coulter@globescan.com

Caroline Holme- caroline.holme@globescan.com