

# Where the World is Going and How to Navigate its Complexity

A Data-Rich Conversation with GlobeScan and Polecat

11 June 2014



evidence and ideas. applied



# Agenda

- Introduction
- Global Public Opinion Trends from GlobeScan
- Digital Listening Insights from Polecat
- Conclusion
- Q & A

# Presenters



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# Introducing a Unique Partnership

*Combining decades of stakeholder research and digital listening experience*



Stakeholder intelligence & engagement specialists at the nexus of reputation, brand and sustainability

Together we provide the digital intelligence, primary research and analysis needed to flourish in today's volatile and networked world.



Advanced digital analytics to navigate complexity, anticipate risks & inspire innovation

# Managing in a VUCA World

**V**olatile

**U**ncertain

**C**omplex

**A**mbiguous



# GLOBAL PUBLIC OPINION TRENDS



# GlobeScan Radar Methodology

## Participating Countries 2014



- Representative samples of 1,000 adults per country in 24 countries
- Some urban-only surveying in certain developing countries
- Face-to-face and telephone interviewing between December 2013 and April 2014
- 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.

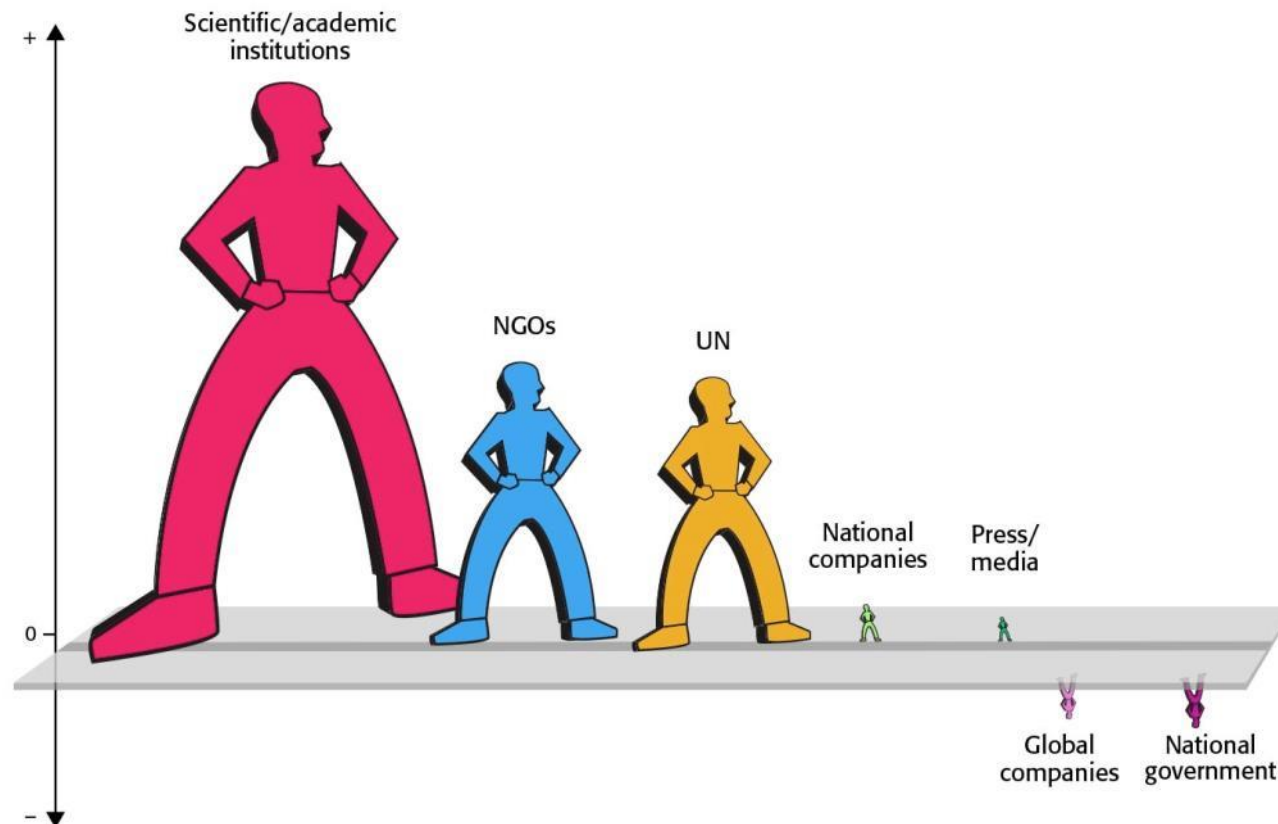
# TRUST



# Low trust in government and global companies

## Net Trust\* in Institutions

Average of 22 Countries,\*\* 2014

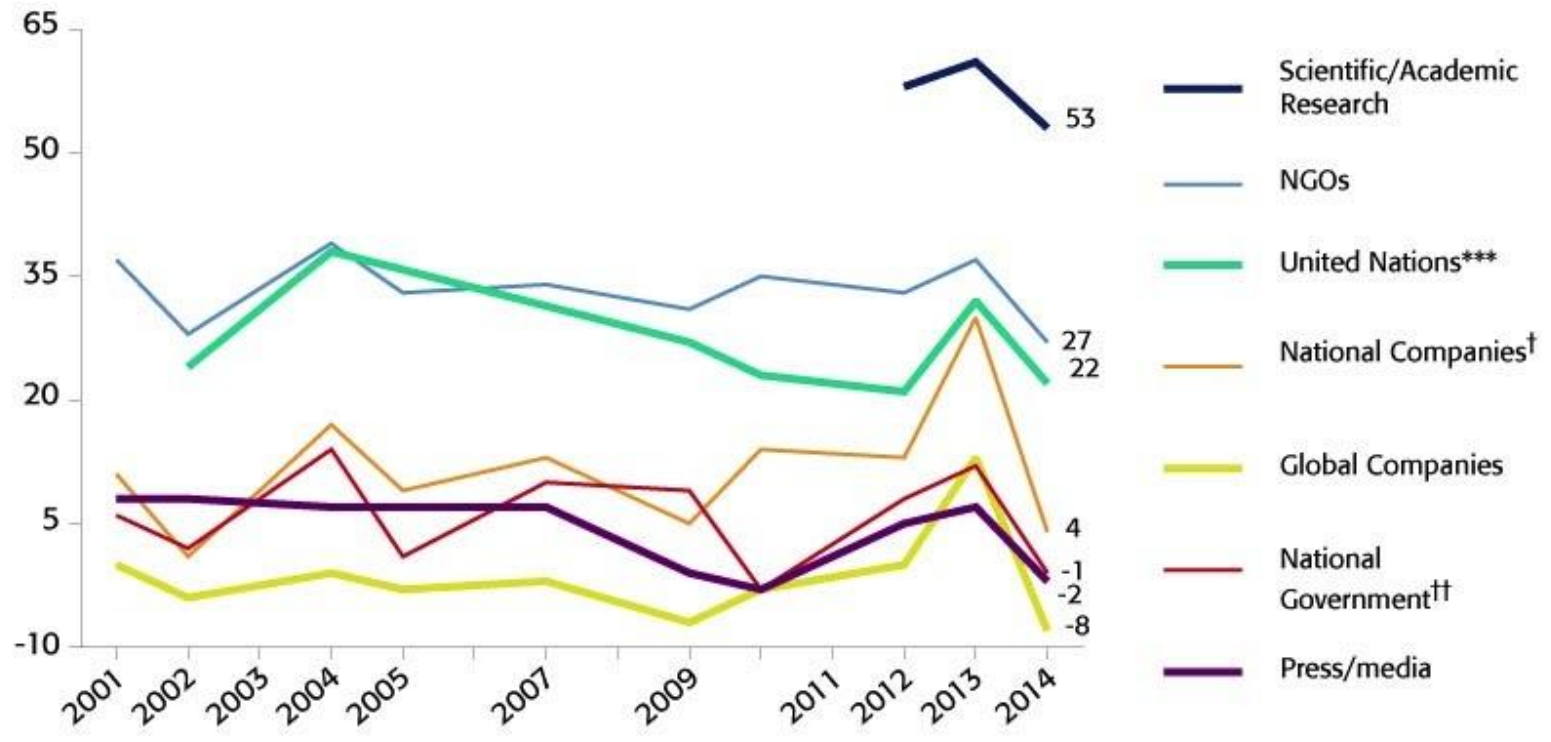


\*Net trust equals “a lot of trust” and “some trust” minus “not much trust” and “no trust at all”

# Sharp decline in trust in all institutions; trust in global companies now at all time low among tracked countries

## Net Trust\* in Institutions

Average of 15 Tracking Countries,\*\* 2001–2014



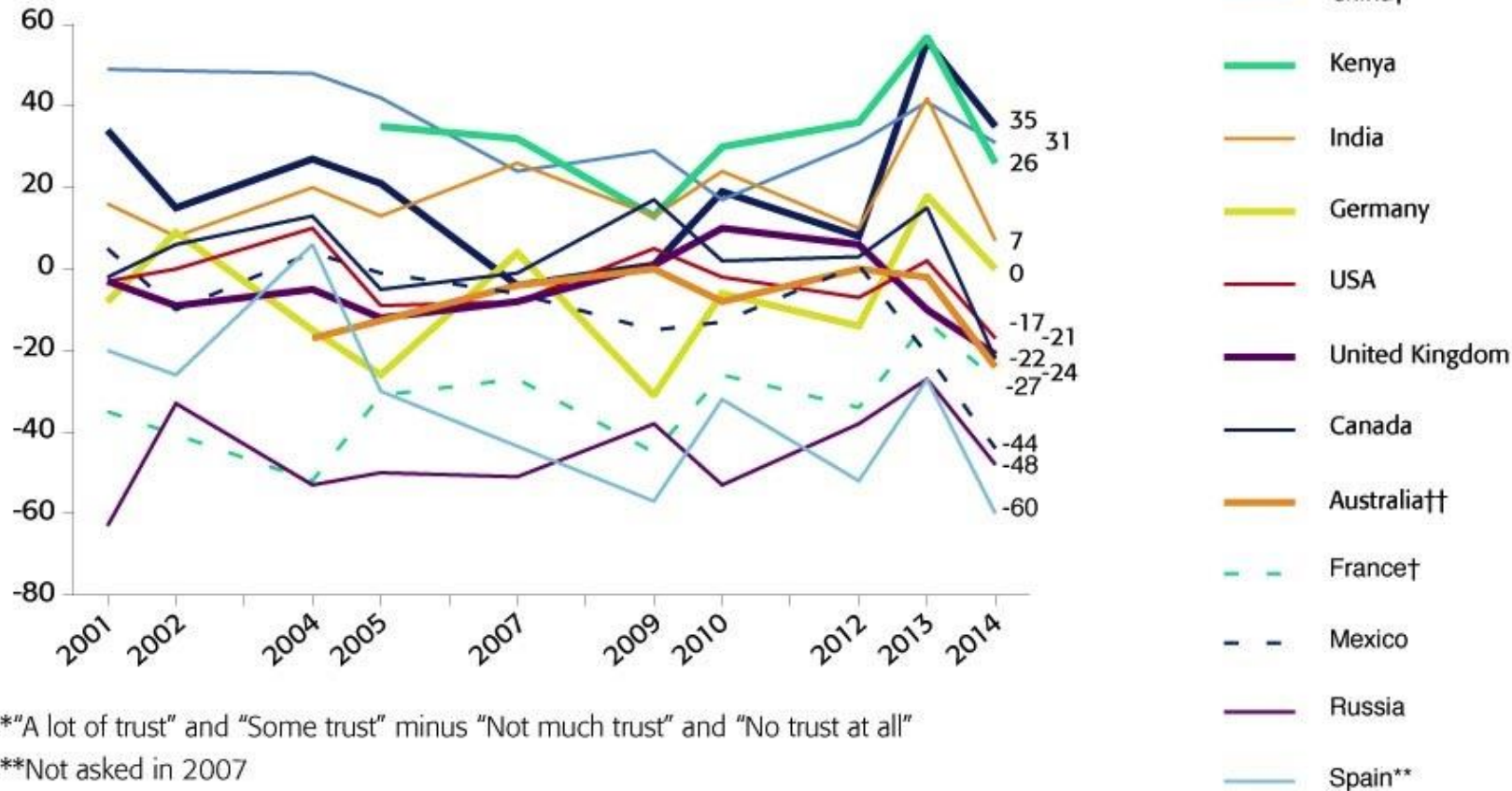
\*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

\*\* Includes Australia, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Australia not asked in 2001–2002 and 2005; China not asked in 2002; France not asked in 2002; Kenya not asked 2001–2004; Spain not asked in 2007.

# Trust in global companies has dropped across a wide range of countries

## Trust in Global Companies

Net Trust,\* Selected Countries, 2001–2014



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

\*\*Not asked in 2007

†Not asked in 2005

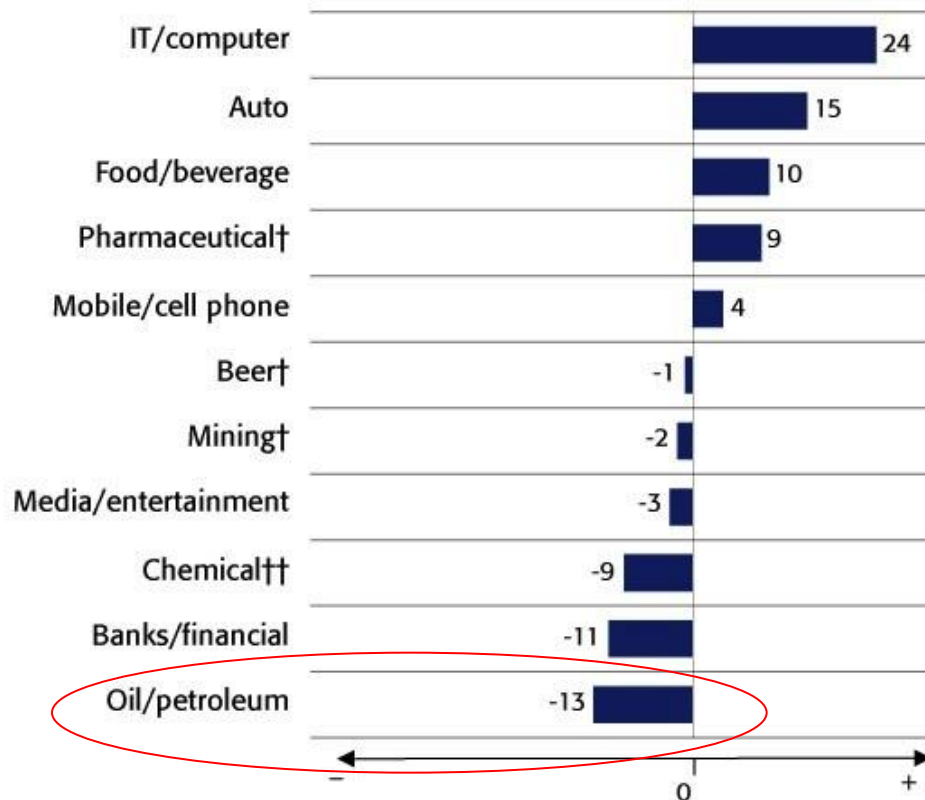
††Not asked in 2002

# INDUSTRY SECTORS

# Challenging times for petroleum and financial sectors

## Net Trust\* in Industry Sectors

Average of 22 Countries,\*\* 2014



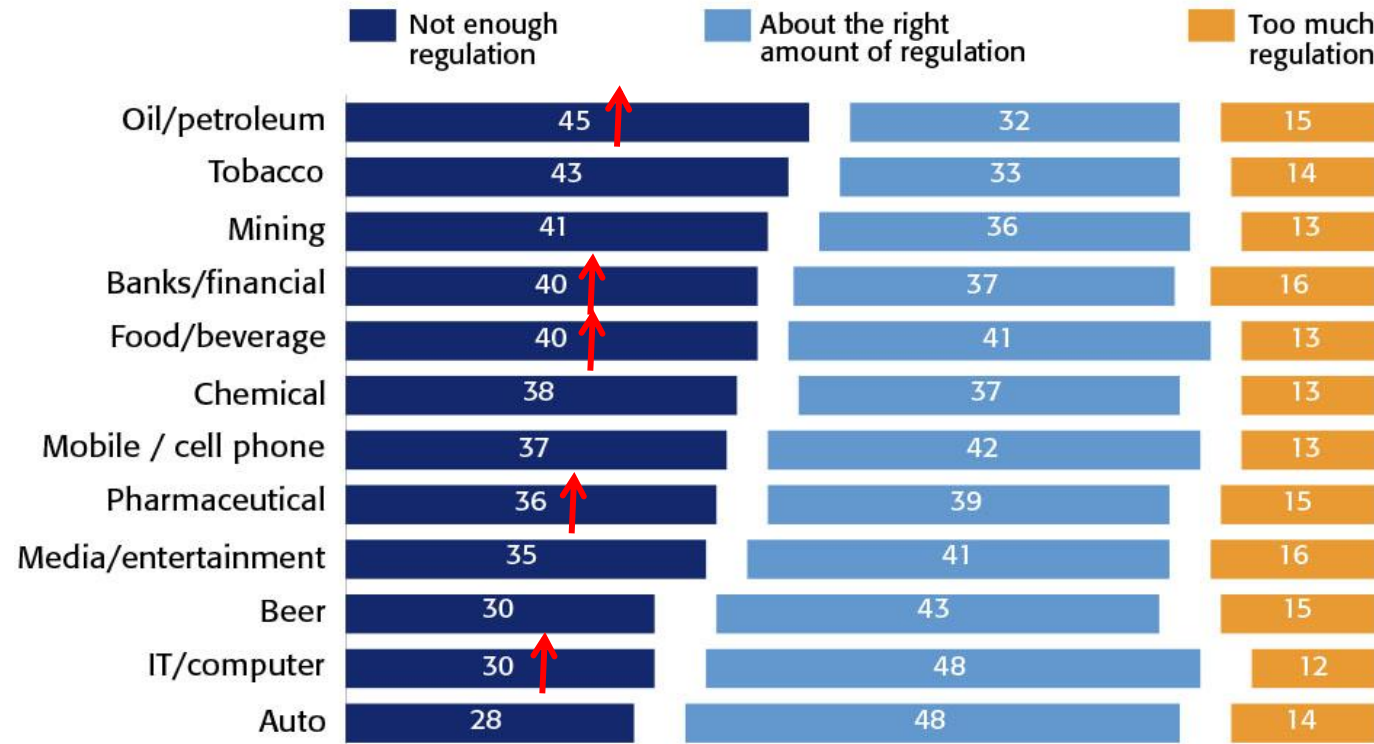
\*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

\*\*Includes Argentina, Australia, Brazil, Canada, Chile, China, France, Germany, Ghana, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, Turkey, UK, and USA

# Pressure for more regulation higher for oil industry than tobacco

## Assessment of Government Regulation of Industry Sectors

Average of 20 Countries,\* 2014



R14\_9\_16\_likert

\*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, Spain, Turkey, UK, and USA

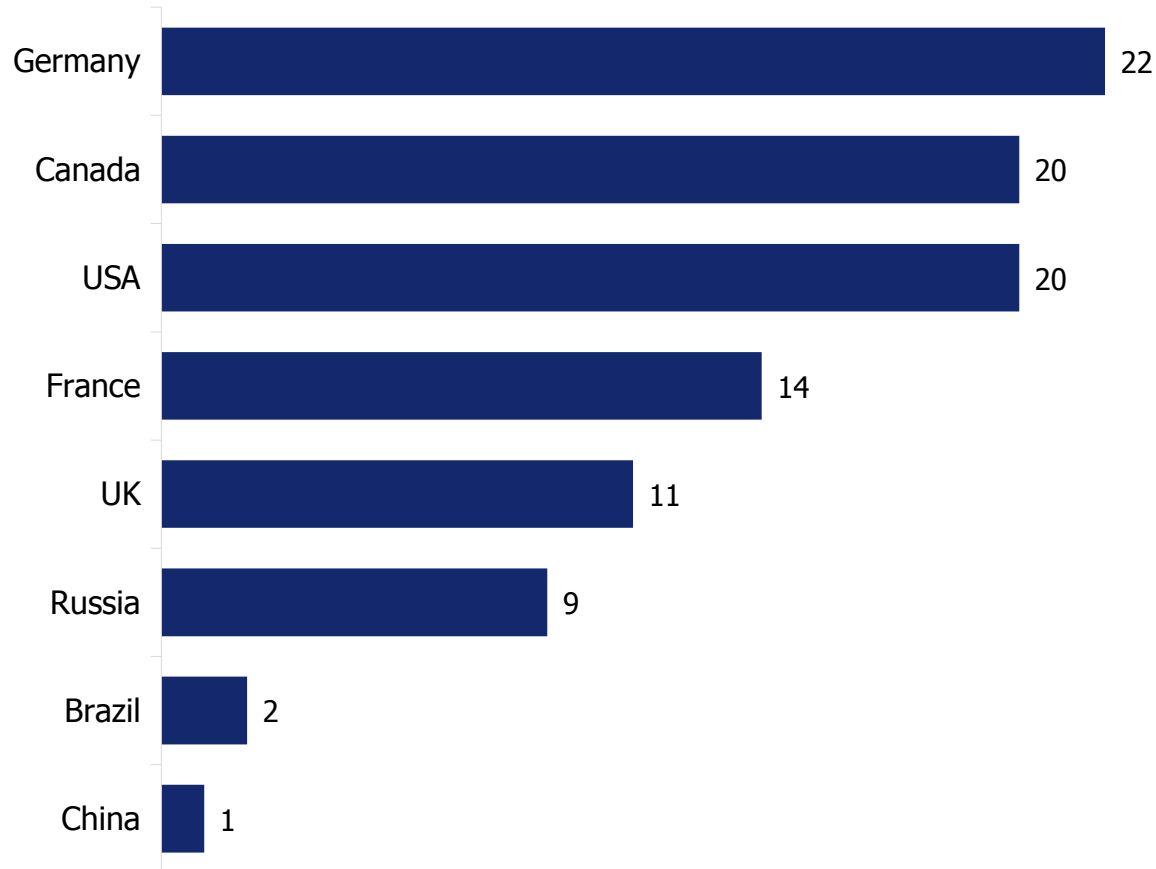
The white space in this chart represents "DK/NA."



# One in five Germans, Americans and Canadians mention an oil company as the least responsible

## Oil Companies Named as Least Socially Responsible

Select Countries, 2014

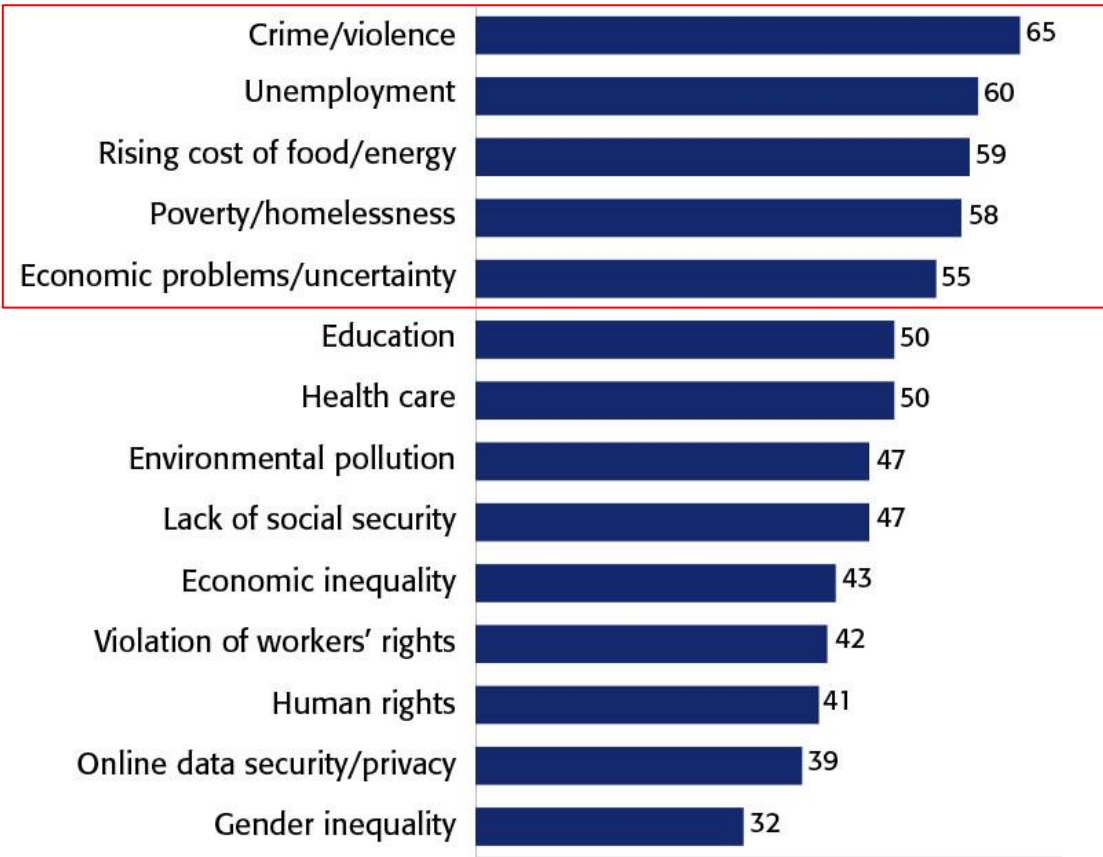




# ISSUES TRACKING

# Crime and violence is seen as most serious of a range of societal challenges

Seriousness of Challenges to Society  
 "Very Serious," Average of 21 Countries, 2014



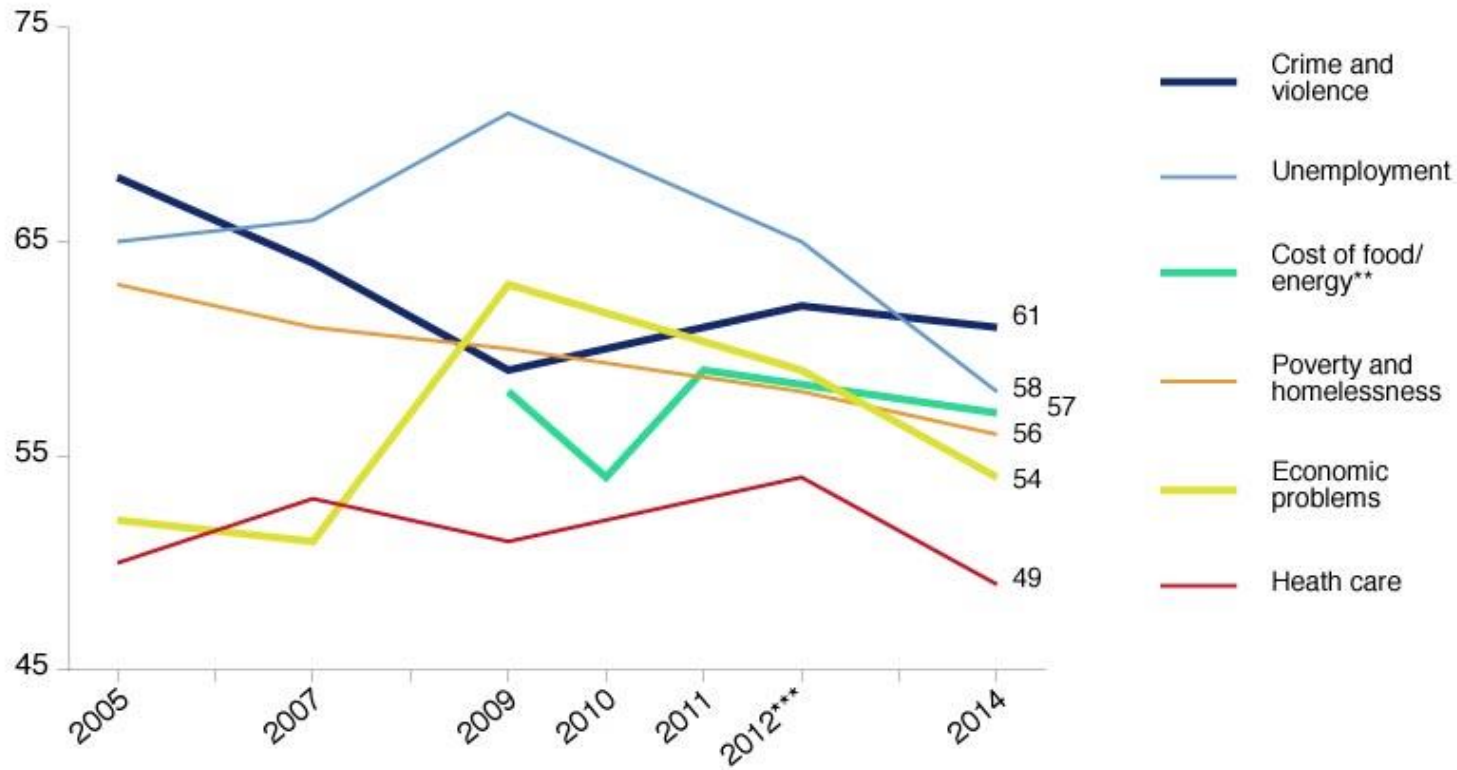
R14\_3

Not asked in Argentina and Brazil

# Crime and violence is seen as most serious of a range of societal challenges

## Challenges to Society

"Very Serious," Average of 13 Countries,\* 2005–2014



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

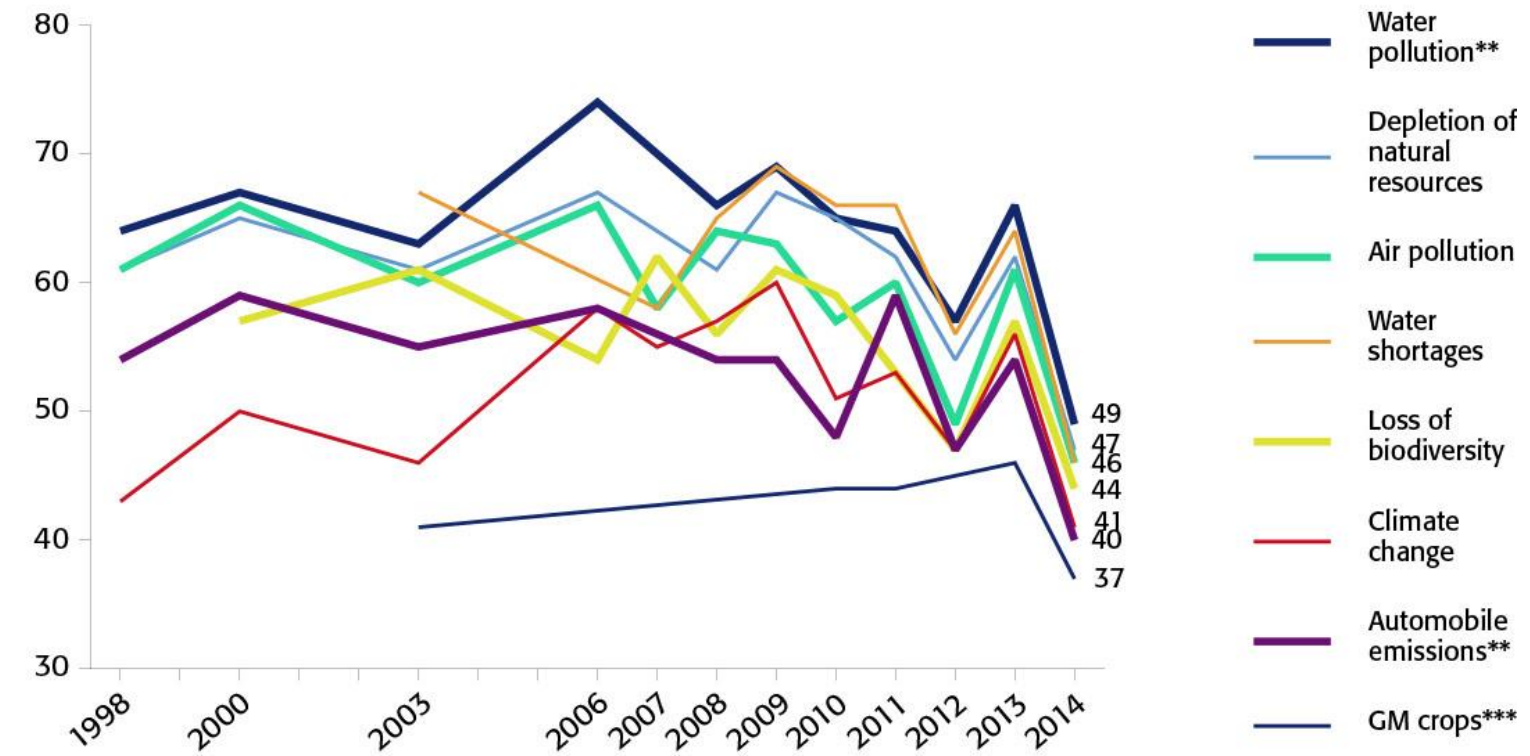
\*\*Not asked in Canada in 2011

\*\*\*Russia not asked

# Perceived seriousness of environmental issues has dipped to unprecedented lows

## Seriousness of Environmental Issues

"Very Serious," Average of 10 Tracking Countries,\* 1998–2014



R14\_2\_trck

\*Includes China, France, Germany, India, Indonesia, Mexico, Nigeria, Turkey, UK, and USA

\*\*Not asked in France in 2011

\*\*\*Not asked in France, Indonesia, UK, or USA in 2011





# **Virtual Insights to ‘Trust’ Vignettes from Digital Analytics**

**Yasmin Crowther & Bronwyn Kunhardt**

**June 2014**

- Introduction to Polecat and **MeaningMine™**
- How 'Trust' Manifests Online
- Emerging Economies: geo-political risks & perceptions
- Deep Dive Energy Sector: Russia & China
- Summary

*"By 2025, the majority of the world's population will, in one generation, have gone from having virtually no access to unfiltered information to accessing all the world's information through a device that fits in the palm of the hand. If the current pace of technological innovation is maintained, most of the world's projected eight billion people on Earth will be online."*

***Eric Schmidt & Jared Cohen, The New Digital Age (2013)***



**MeaningMine™** is Polecat's advanced digital analytics platform – its precision methodology enables the review of online and social media. Data visualisation allows us to:

- **See the breadth & focus** of coverage and conversations
- Assess **language of positivity or hostility** around key topics
- **Rank issues** according to topicality and expressed sentiments
- **Identify influencers** who resonate and capture share of voice
- **Track the dynamics of events** – real and online – that escalate or assuage waves of public opinion
- Help identify **strategic risks** and **opportunities** arising in both digital and real world landscapes

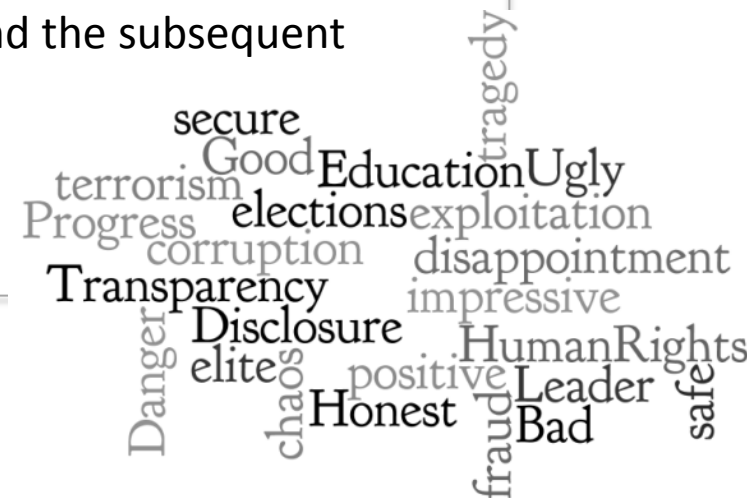




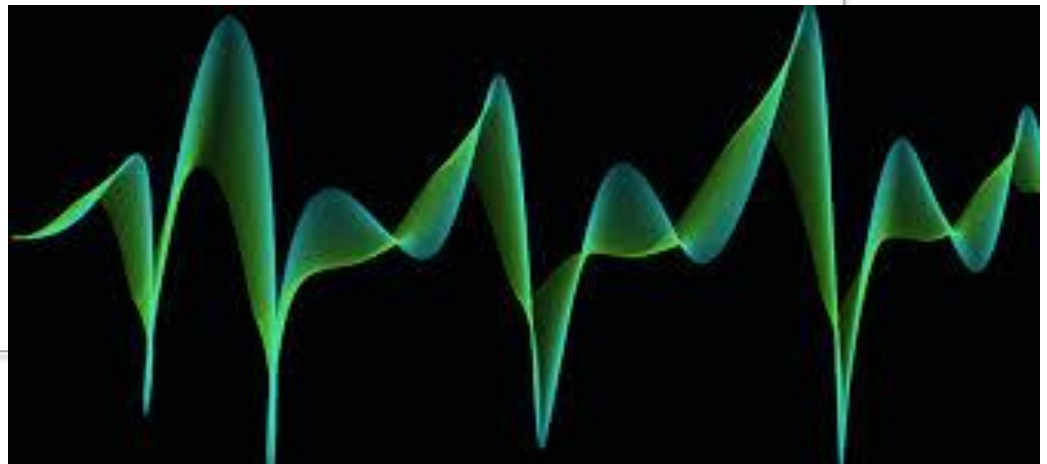
**Trust** is a one-word label for diverse feelings and opinions that crystallise around all sorts of issues, people, organisations, news and events.

When we look online, we often find:

- Dynamics and drivers of 'trust' are multifactorial
- Specific events or crises may serve as a focus or catalyst that crystallises intense conversations and anxieties
- Such events – and associated brands - can serve as a lightning rod for deeper and broader societal issues and uncertainties
- The challenge is to discern the tides of conversation, understand expressed needs, how they're coalescing and being addressed, and the subsequent risks & opportunities
- Forfeited trust has an enduring digital legacy

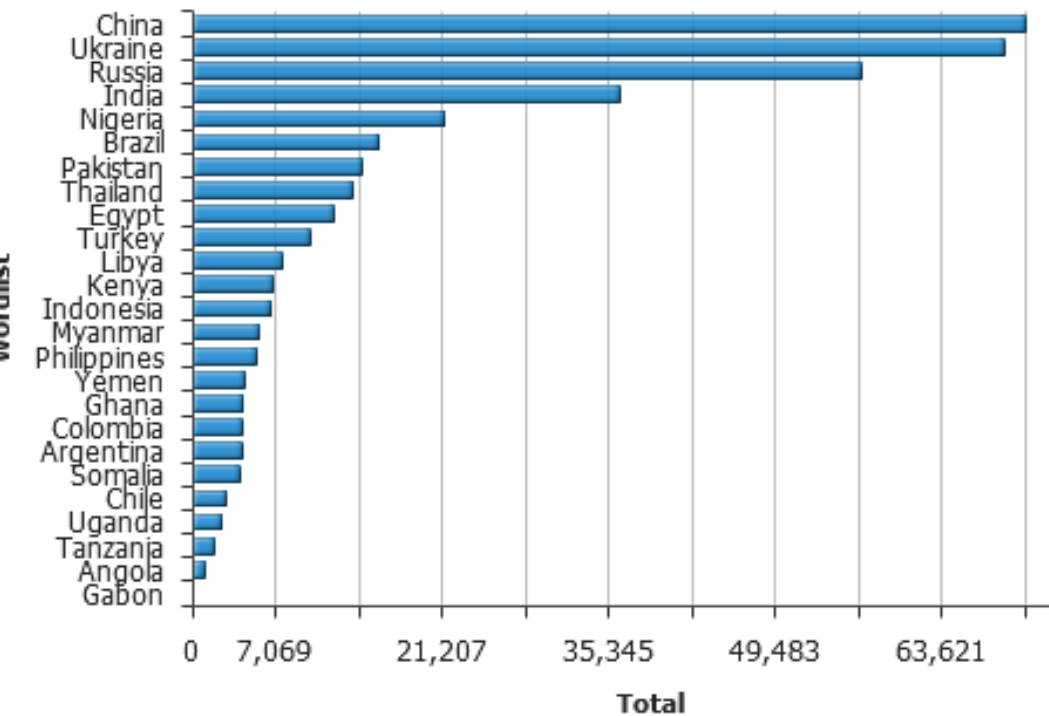


- **MeaningMine™** Geopolitical Mapping of Emerging Economies
- Analysis of global conversations in the English language
- Drawn from publicly available online coverage and social media
- April through May 2014
- High-level and snap-shot focus on India, Turkey and Nigeria

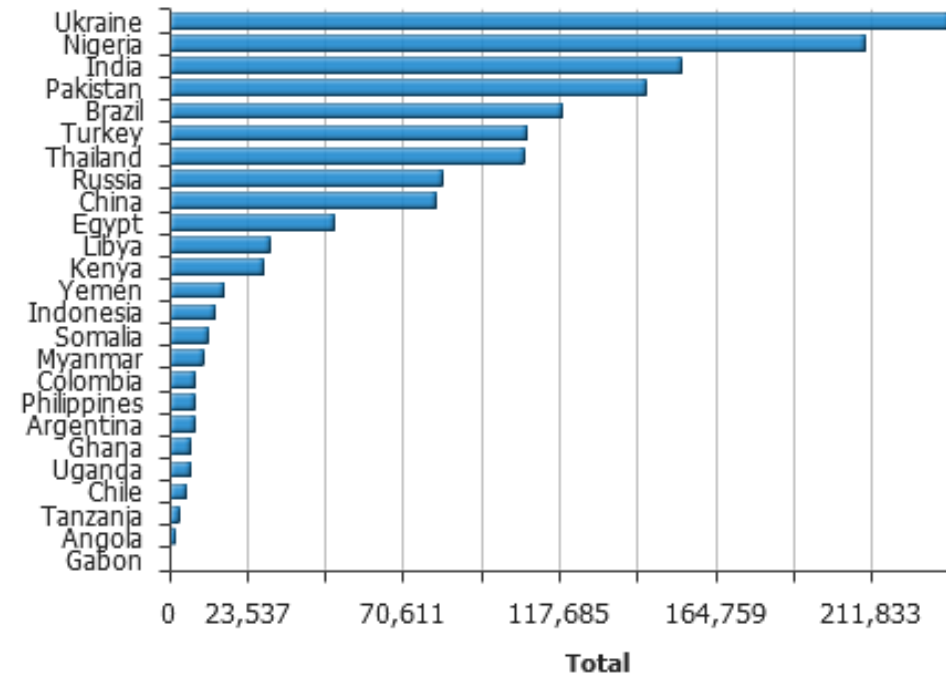


# Emerging Economies: Top-Level Summary (April-May 2014)

*Volume of conversation (English language) about a range of emerging economies that has significance for a variety of geopolitical risks.*

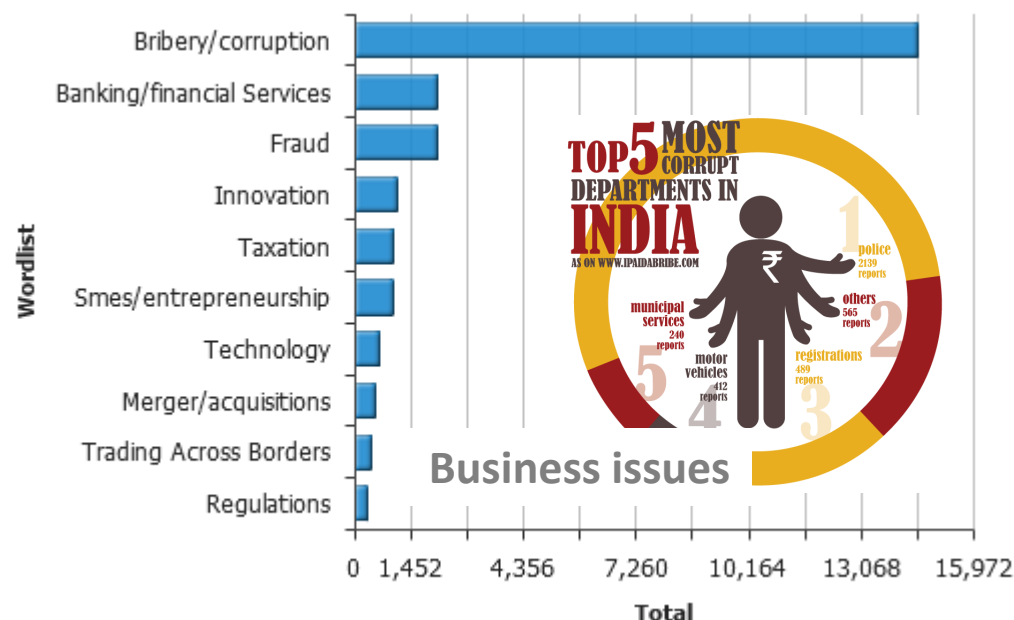
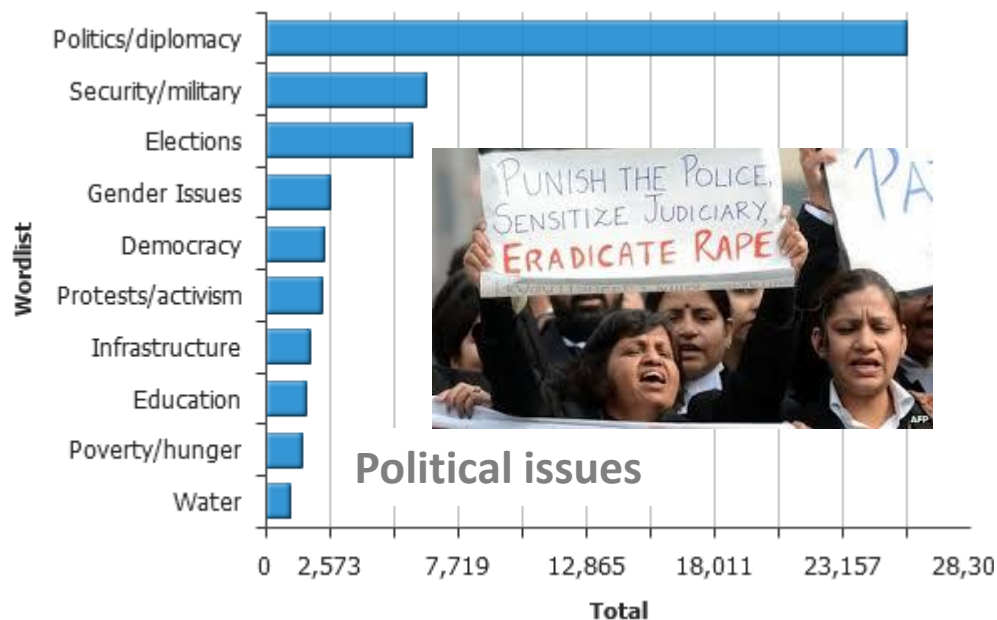
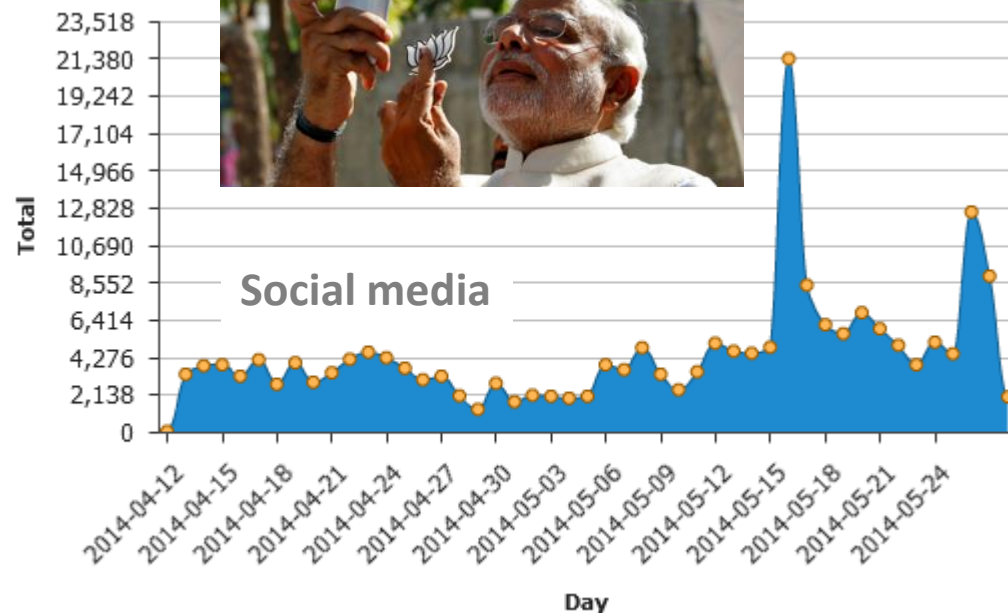
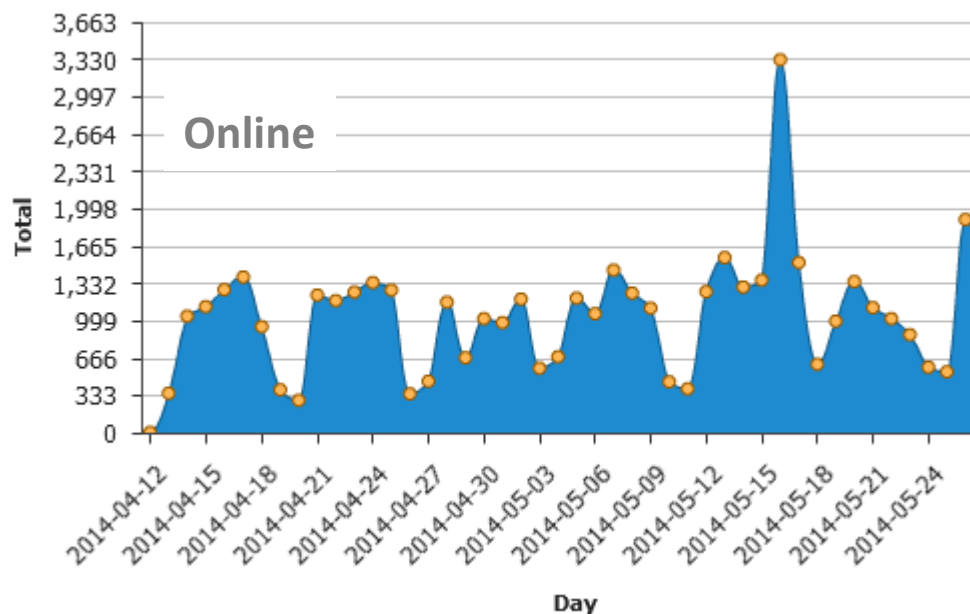


Online

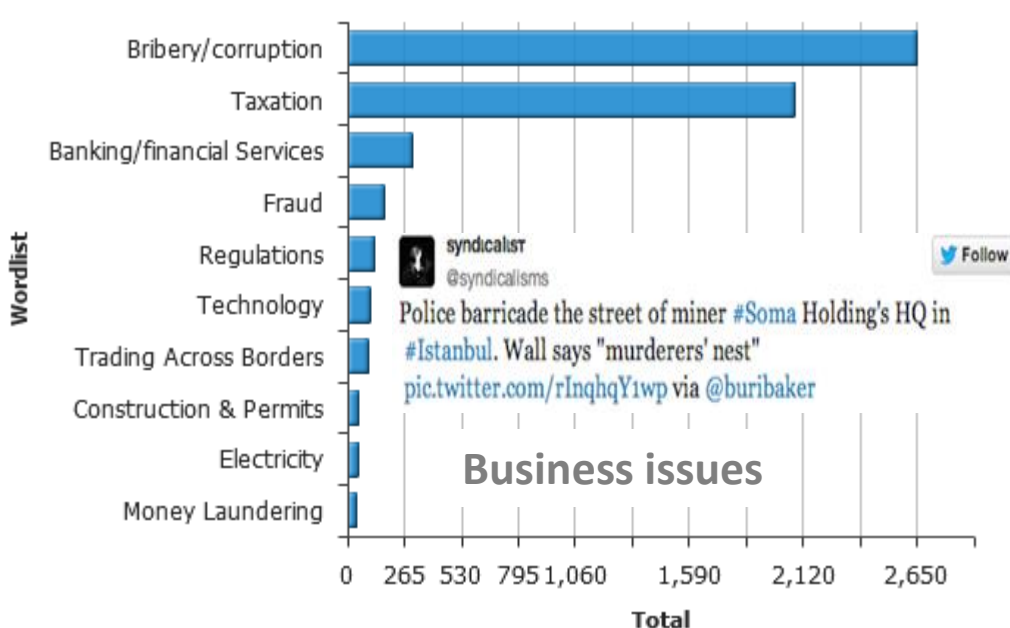
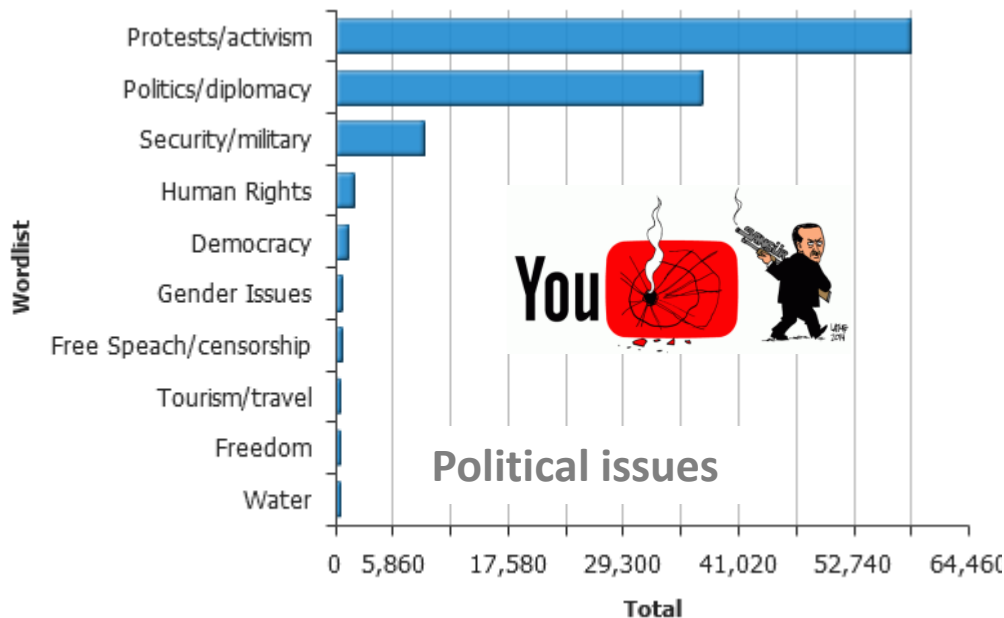
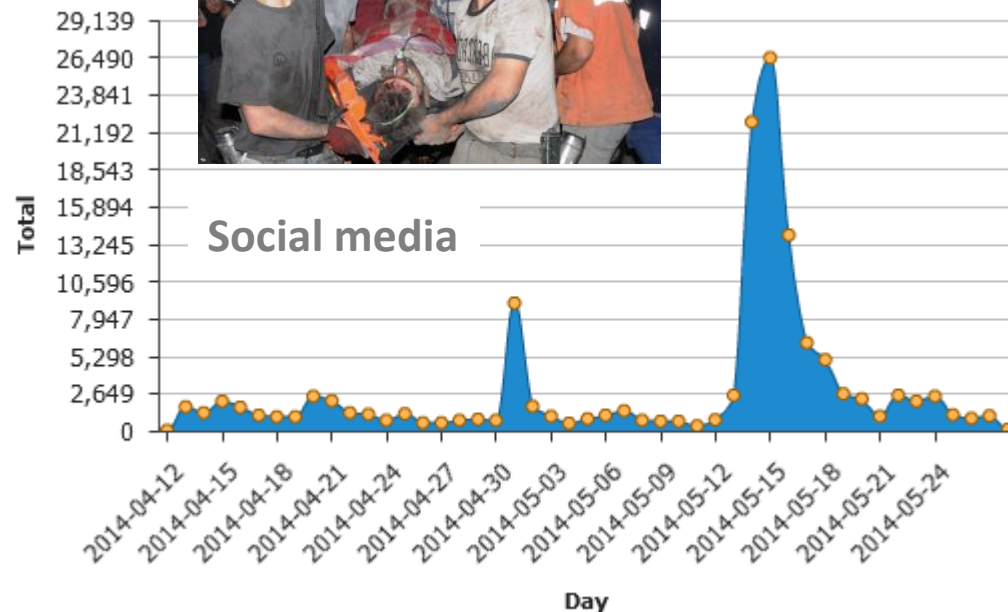
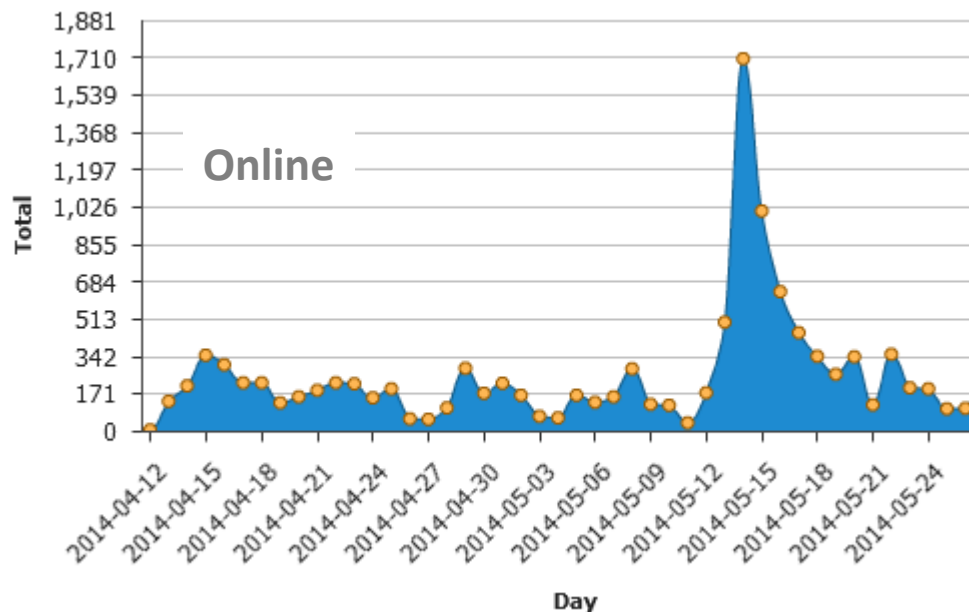


Social Media

# Country Cardiographs: India



# Country Cardiographs: Turkey

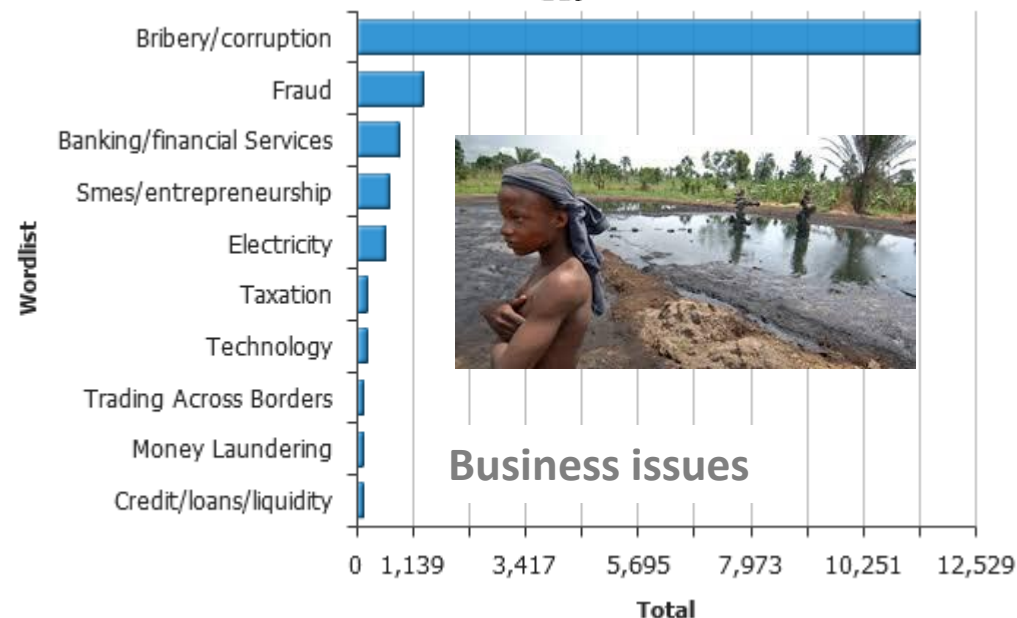
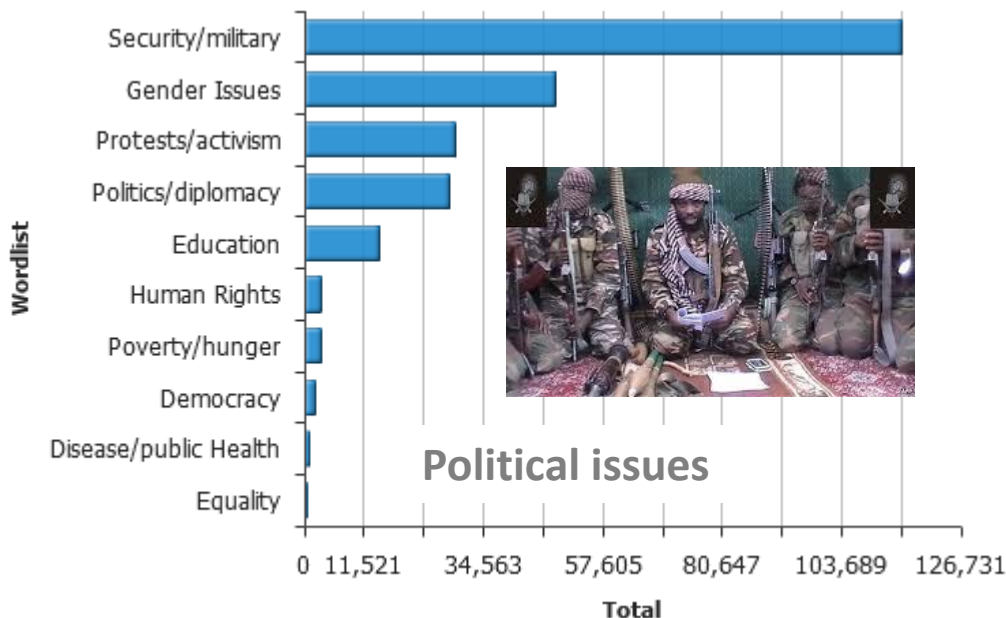
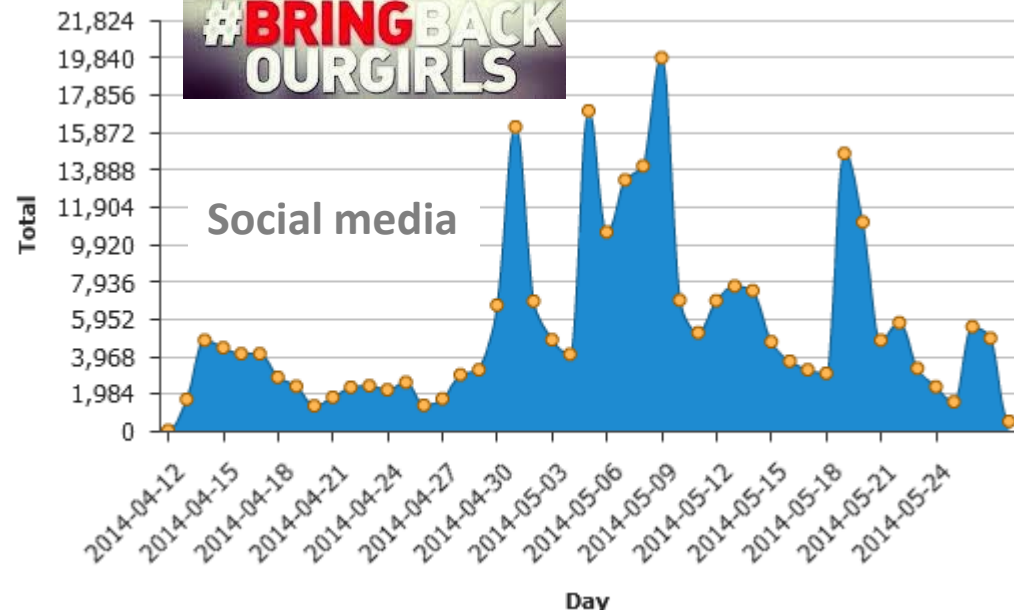
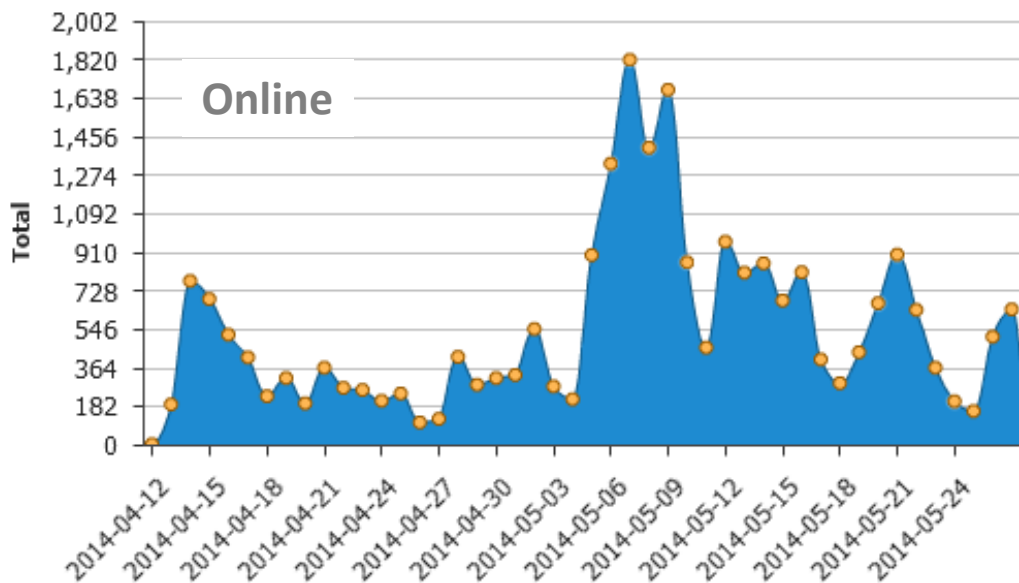


syndicalist  
@syndicalisms

Police barricade the street of miner #Soma Holding's HQ in #Istanbul. Wall says "murderers' nest"  
[pic.twitter.com/rInqhQY1wp](https://pic.twitter.com/rInqhQY1wp) via @buribaker

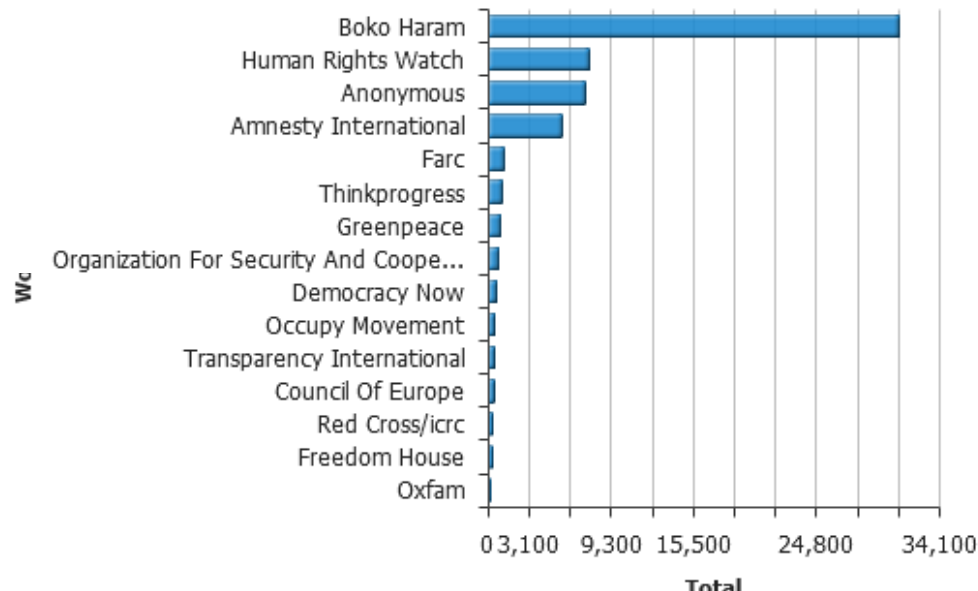
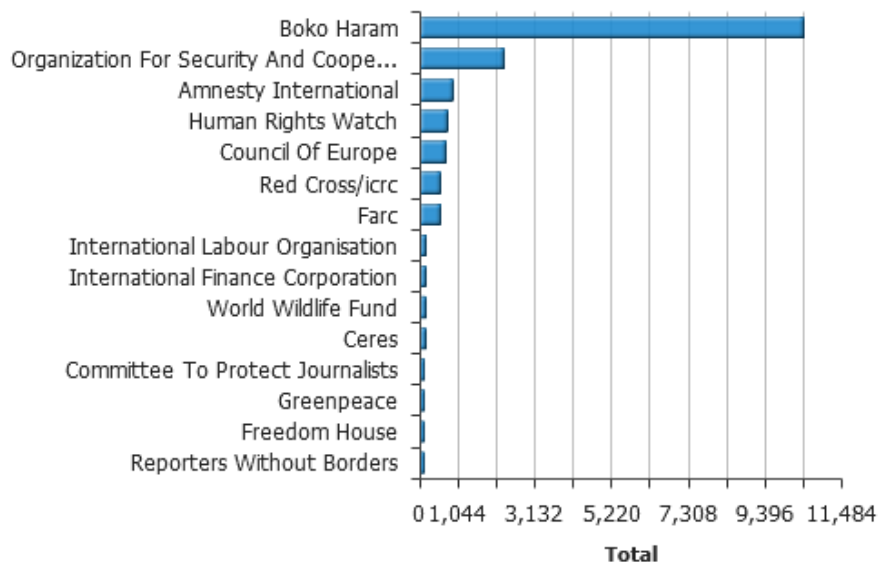
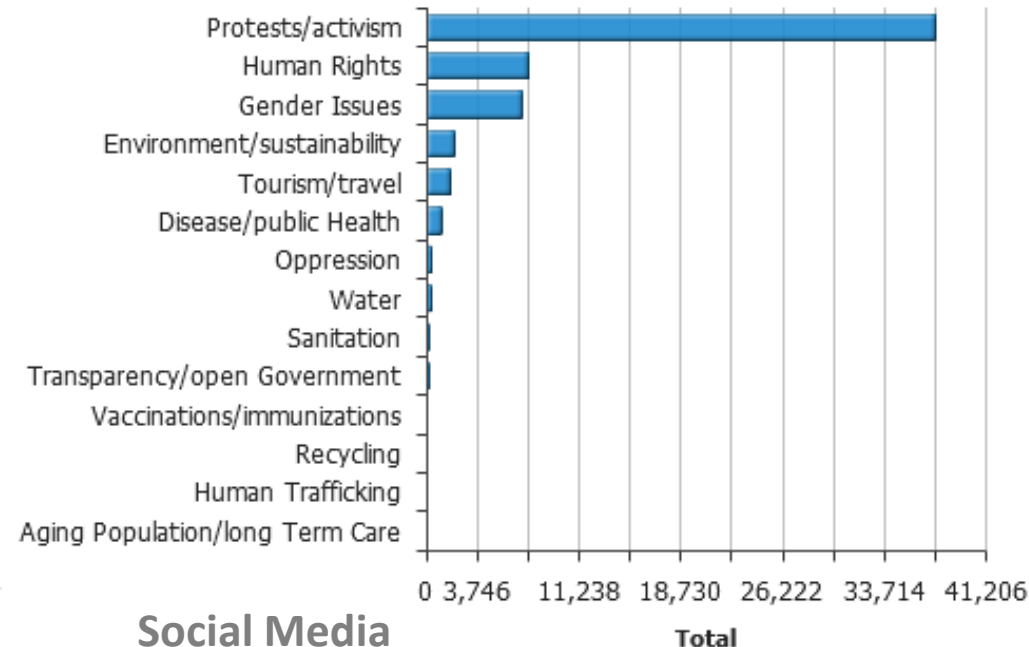
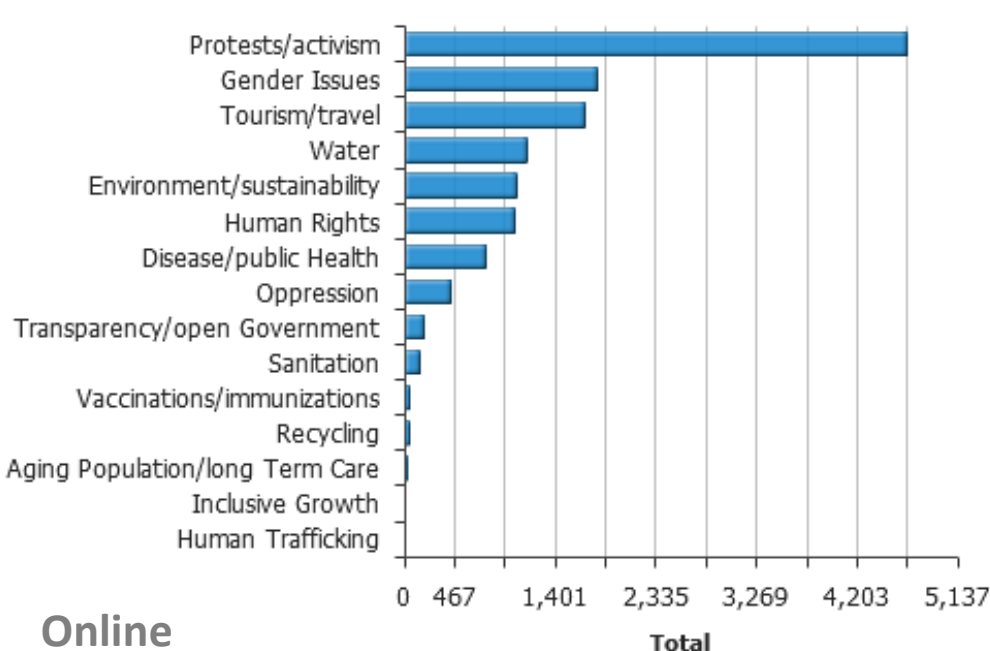


# Country Cardiographs: Nigeria



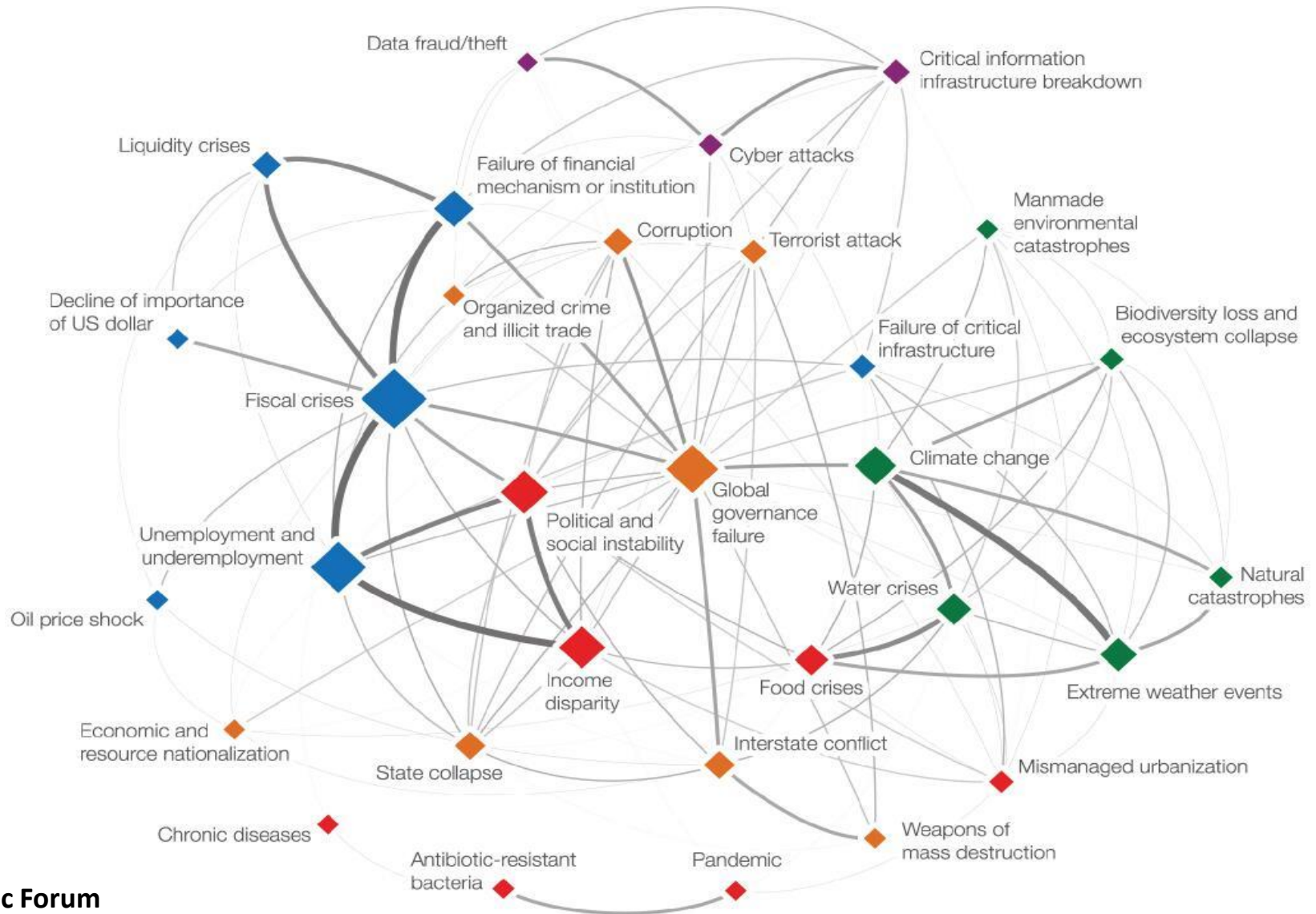


# Emerging Economies: Issues & Actors Summary (April-May 2014)

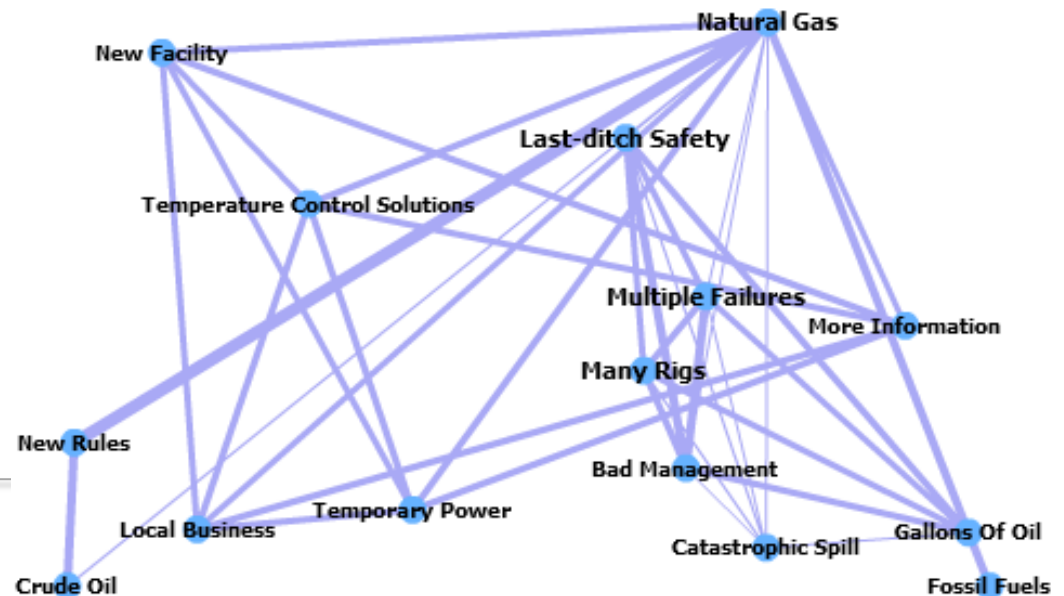




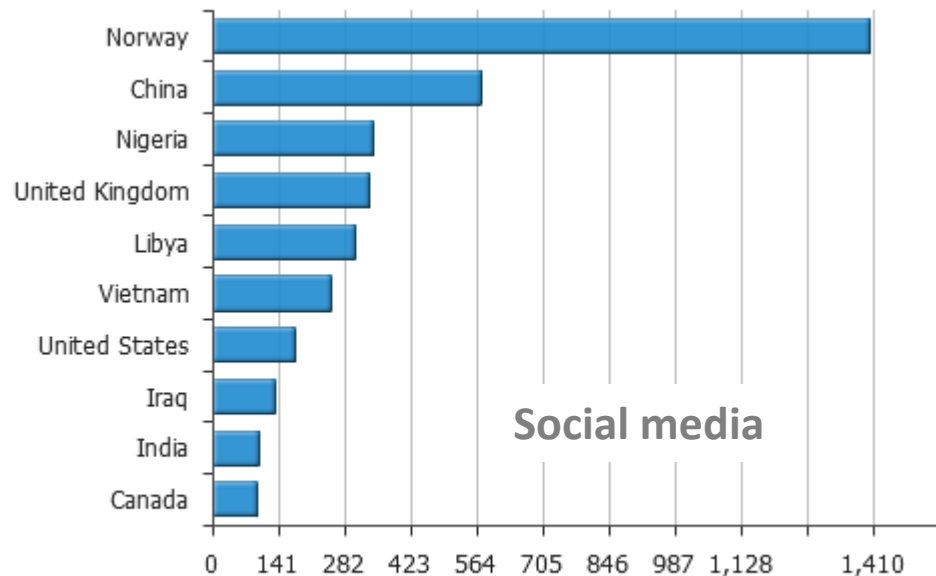
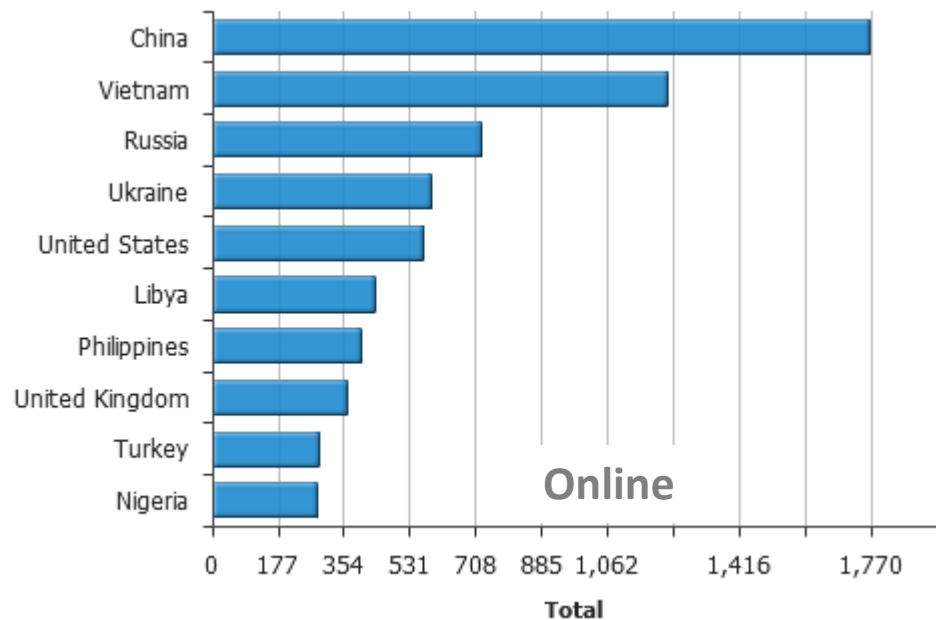
# Risks of Opportunities



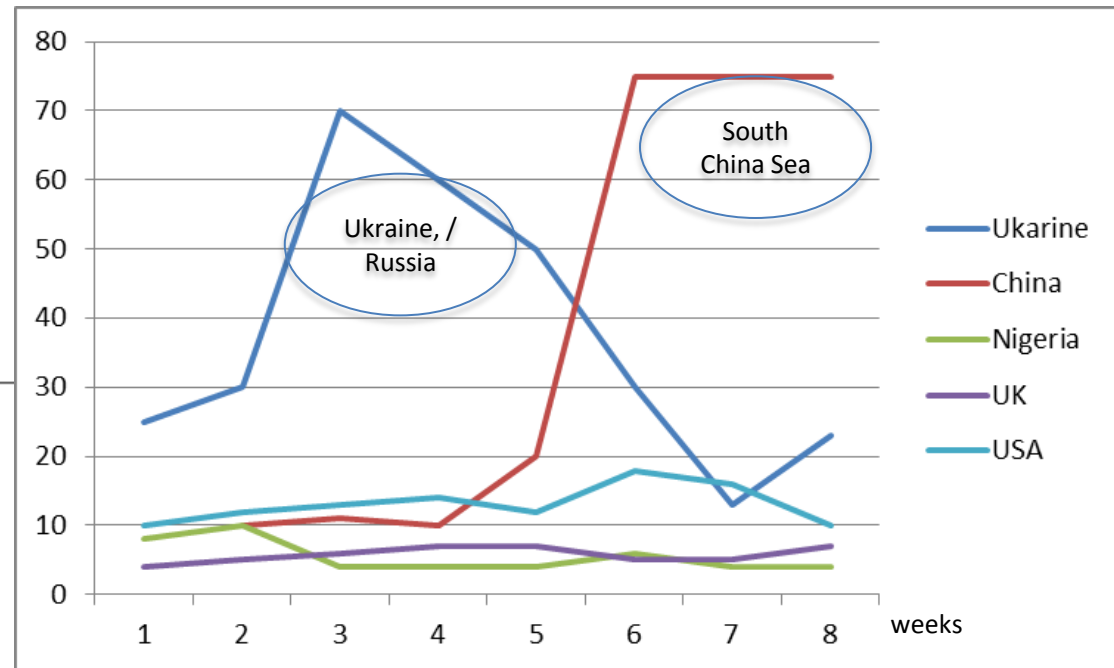
- **MeaningMine™** focus on the Energy Sector
- Analysis of global conversations in the English language
- Drawn from publicly available online coverage and social media
- April through May 2014
- Focus on Russia and China
- Influencers and narratives



# Deep Dive Energy: Key Countries & Issues (April-May 2014)



% global coverage

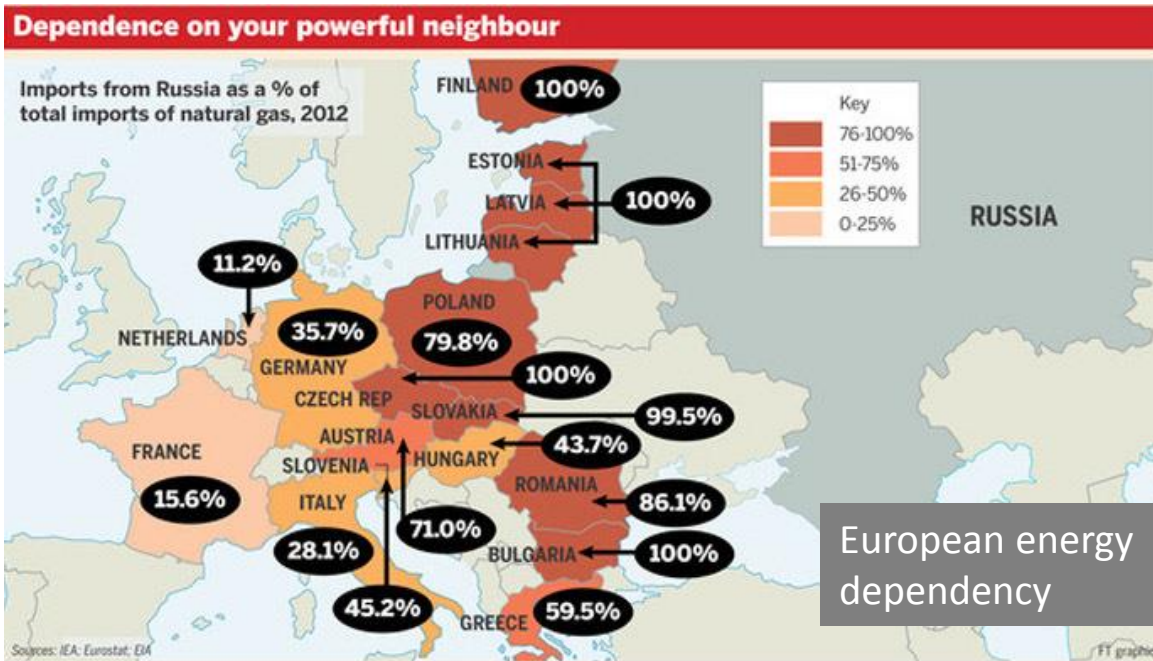


# Energy Headlines: China (April-May 2014)





# Energy Headlines: Russia (April-May 2014)



European energy dependency



# Energy Conversations Summary – End May 2014



A word cloud shaped like a triangle, with the largest words at the top. The words are in various colors including blue, green, orange, and red. The most prominent words are 'VIETNAMESE FISHING' and 'EXCLUSIVE ECONOMIC ZONE' in large blue letters. Other significant words include 'CHINESE FISHING' in green, 'CONTINENTAL SHELF' in orange, and 'CHINESE OIL' in green. Smaller words include 'NAUTICAL MILES', 'VIETNAMESE VESSELS', 'HANDFUL OF OTHERS', 'DISPUTED WATERS', 'RECENT YEARS', 'FAMILY'S WISHES', 'PREGNANT WOMAN', '15-YEAR-OLD GIRL', 'HUMAN RIGHTS', 'NEW GOVERNMENT', 'VIETNAMESE BOAT', 'LEGAL ACTION', 'AMATEUR VIDEO', 'CHINESE SHIPS', 'HOT VIDEO', 'CHINESE VESSEL', 'CAMP FOR OIL', and 'INTERNATIONAL LAW'.

VIETNAMESE FISHING  
EXCLUSIVE ECONOMIC ZONE  
CHINESE FISHING  
CONTINENTAL SHELF  
CHINESE OIL  
NAUTICAL MILES  
VIETNAMESE VESSELS  
HANDFUL OF OTHERS  
DISPUTED WATERS  
RECENT YEARS  
FAMILY'S WISHES  
PREGNANT WOMAN  
15-YEAR-OLD GIRL  
HUMAN RIGHTS  
NEW GOVERNMENT  
VIETNAMESE BOAT  
LEGAL ACTION  
AMATEUR VIDEO  
CHINESE SHIPS  
HOT VIDEO  
CHINESE VESSEL  
CAMP FOR OIL  
INTERNATIONAL LAW

Online



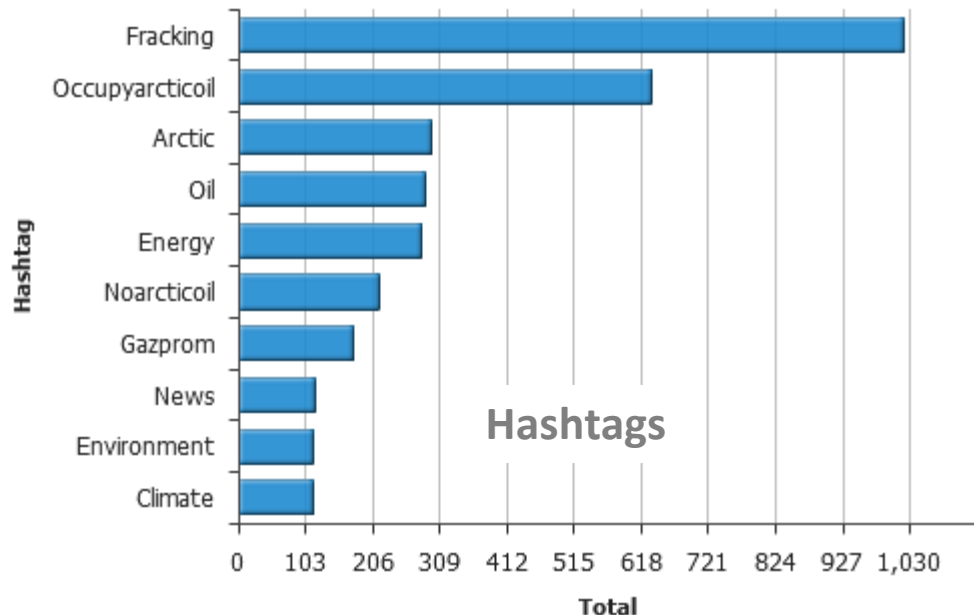
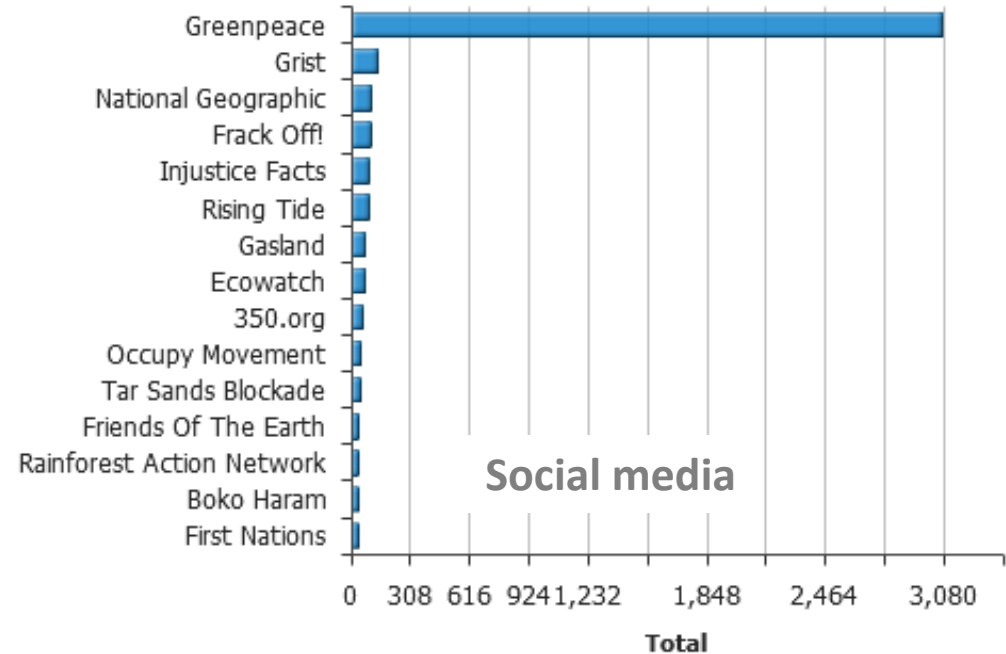
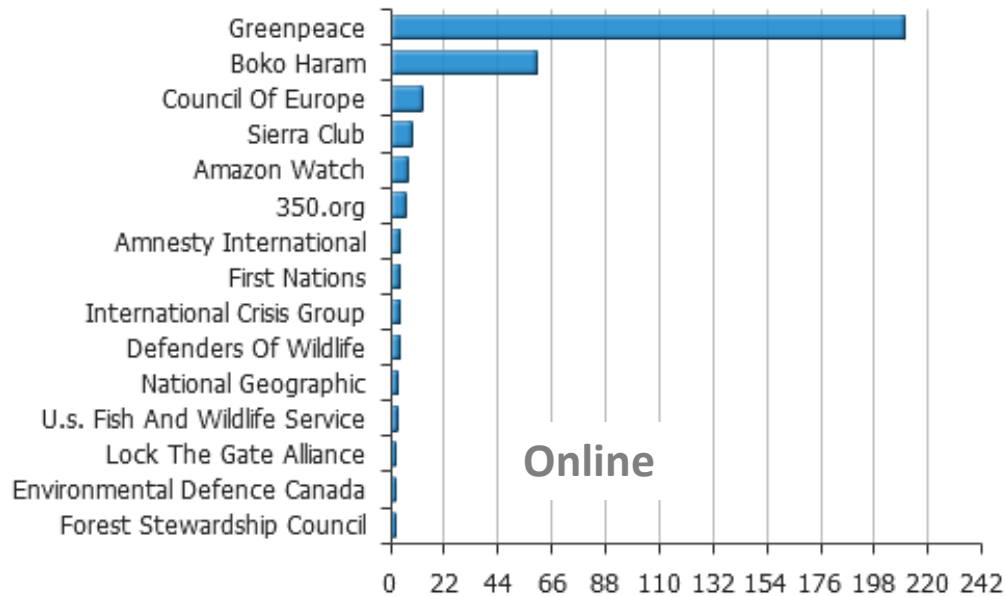
A word cloud shaped like a triangle, with the largest words at the top. The words are in various colors including green, orange, blue, and red. The most prominent words are 'GREENPEACE ACTIVISTS OCCUPY OIL' and 'NORWEGIAN ARCTIC' in large green and orange letters. Other significant words include 'FOSSIL FUEL INTERESTS ATTACK' in blue, 'BP OIL SPILL' in green, 'GO FIND AN OIL RIG' in blue, 'LOUD ASS SEAGULLS' in blue, 'ILLING ME CA' in orange, 'SWIM IN OR SOMETHING' in green, 'SEATTLE IS CUTE' in orange, 'PLEASE SIGN PETITION' in blue, 'SUPREME COURT' in orange, 'APPEALS COURT WQ' in blue, '12 COUNTRIES BLOCKED 2' in orange, 'LEADER OF THE PROTESTERS' in orange, 'ARCTIC FROM DUTCH PORT' in blue, 'GREENPEACE ACTIVISTS PREVENT' in blue, 'GADSDEN OIL RIG' in orange, 'DRILL IN THE ARCTIC' in blue, 'BIG OIL DRILLING DISASTER' in blue, 'BP OIL SPILL CLAIMS' in blue, 'OIL RIGS DESTINED' in blue, 'GROUP OF FIFTEEN GREENPEACE' in orange, 'SAVE THE AMAZON' in blue, and 'MORNING GREENPEACE ACTIVISTS' in orange.

GREENPEACE ACTIVISTS OCCUPY OIL  
NORWEGIAN ARCTIC  
FOSSIL FUEL INTERESTS ATTACK  
BP OIL SPILL  
GO FIND AN OIL RIG  
LOUD ASS SEAGULLS  
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SAVE THE AMAZON  
MORNING GREENPEACE ACTIVISTS

Social Media

# Deep Dive Energy: Opinion-formers & influencers

Wordlist



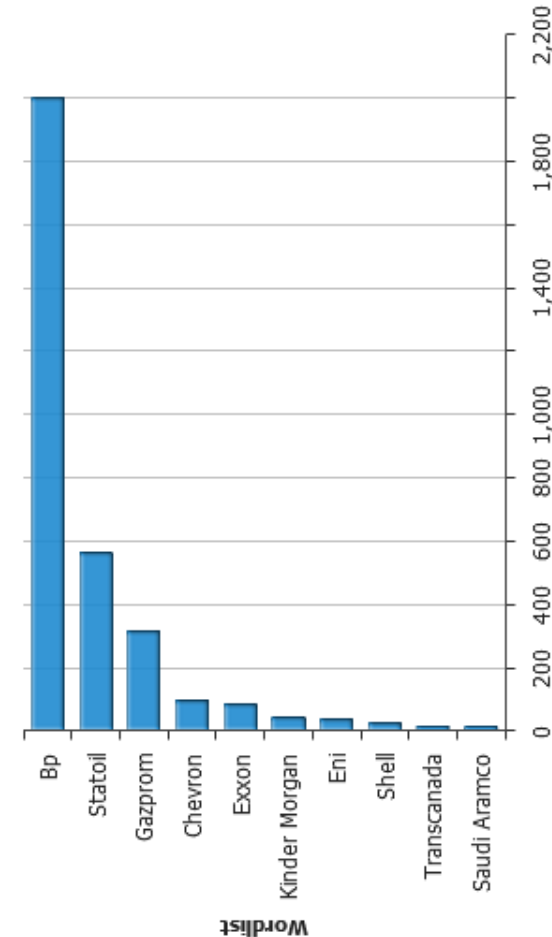
*"Arctic oil represents a dangerous new form of dependence on Russia's state-owned energy giants at the very moment when we should be breaking free of their influence. We cannot hope for any kind of ethical foreign policy while our governments remain hopelessly dependent on companies like BP, Shell and Gazprom."*

**Kumi Naidoo, Greenpeace Int'l Exec Director**



# Summary Pointers

- Online opinion is diverse & dynamic: i.e. many shoals of fish
- Outrage travels across borders to build broader constituencies: e.g. #Fracking and #BringBackOurGirls
- The complexity and interconnectedness of social, economic and environmental challenges is ever more visible to all.
- Strong influencers are able to distil this complexity into a clarity of purpose and deliver targeted actions and words: e.g. Greenpeace
- Disconnects between establishment narratives and public opinion are evermore transparent and 'trust' is hard to regain: BP
- Successful strategies will be smart to digital dynamics; seek to engage clearly with complexity while articulating a strong and clear point of view – all of which demands smart listening, strategic thinking and genuine, involving narratives.



# CONCLUSION

# The Challenge for Corporate Affairs in a VUCA World

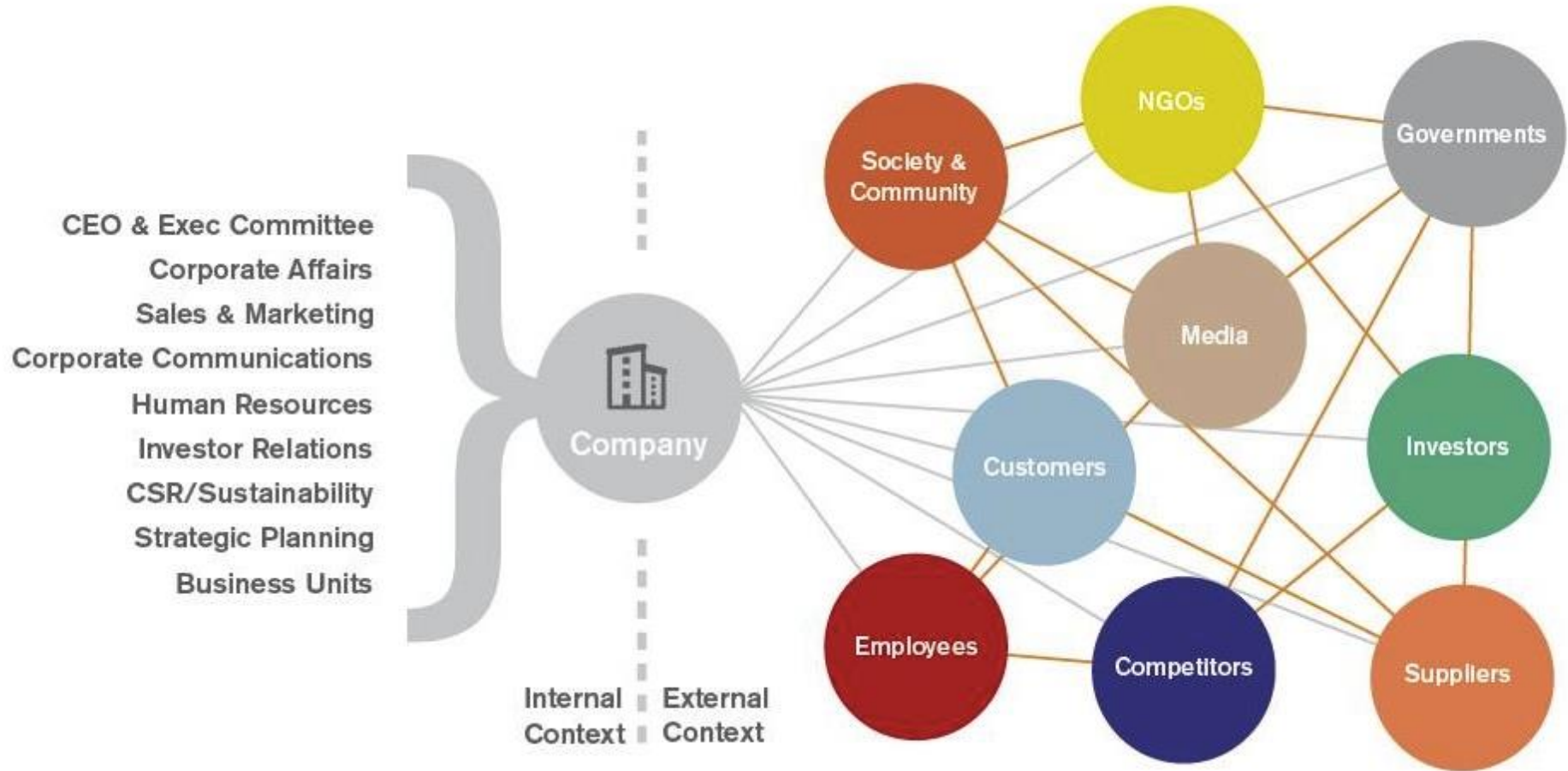
DEFINING WHAT YOU STAND FOR WITH DIVERSE STAKEHOLDERS  
and  
DEMONSTRATING THIS IN AN INTEGRATED AND ALIGNED FASHION  
to  
MINIMISE RISKS AND OPTIMISE OPPORTUNITIES FOR THE BUSINESS  
in  
A VOLATILE, COMPLEX AND CHANGING CONTEXT

# The Challenge for Corporate Affairs in a VUCA World

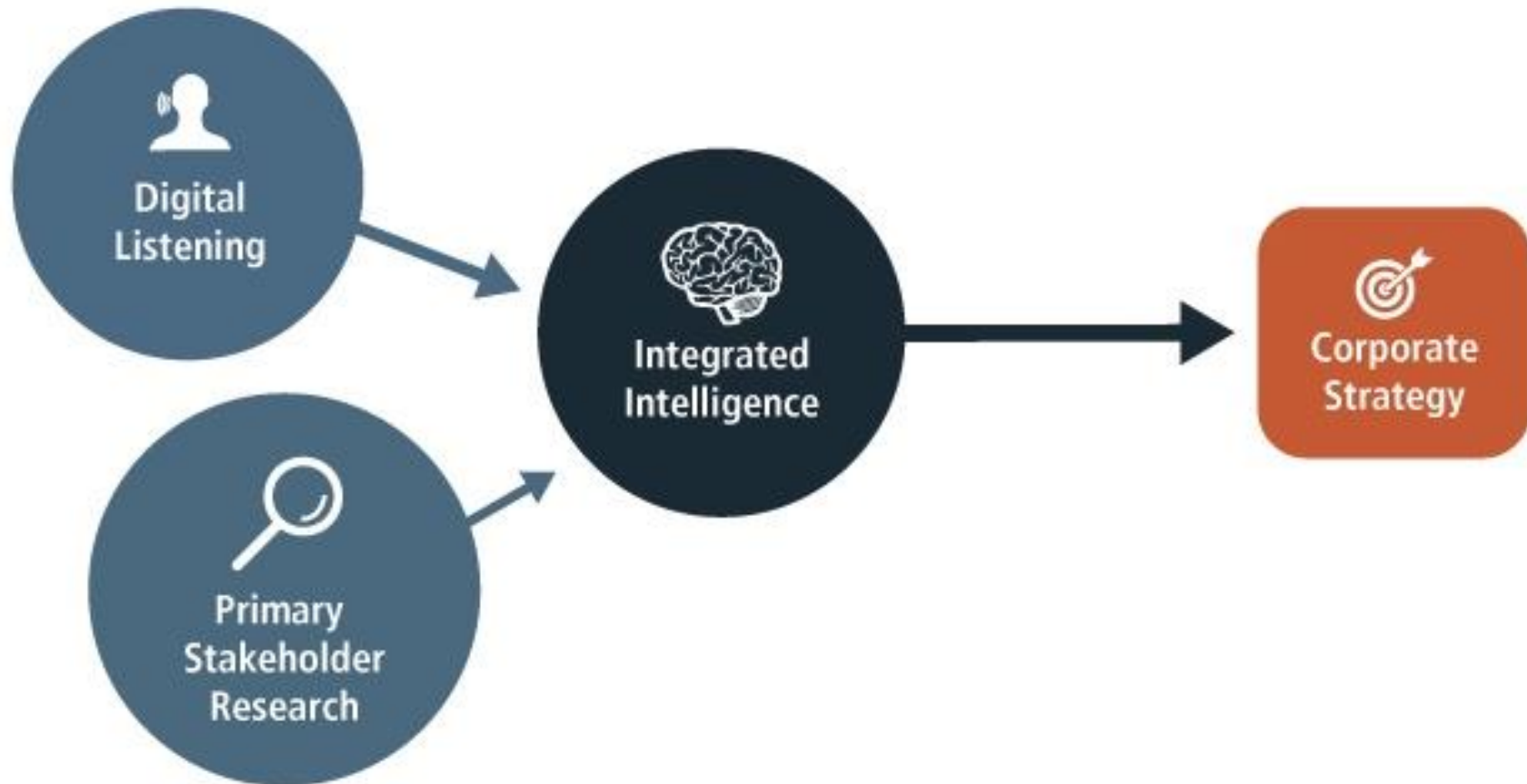
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**LEADERSHIP**

# Stronger internal alignment allows for better management of risks and opportunities – research helps guide this



# Integrated intelligence allows for an evidence-led reputation system that drives better decision making





# Q&A

# Thank you for joining us today!

Please let us know if you have any questions by reaching us at the details below:



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