



GLOBESCAN

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Trust, Expectations & Leadership: *Societal Trends on Perceptions of Business – Asia Pacific*

13 January 2016

Introduction



Chris Coulter
CEO GlobeScan

Speaker at congresses, thought leader on sustainability, corporate social responsibility, trust and reputation.



Jeanne Ng
Director Sustainability Group CLP, one of Asia's largest utility companies

Renown, experienced sustainability expert in Hong Kong, Harvard educated.



Johnny Kwan
Founder Bee Associates
Ex-Chairman BASF China

+30 years of management and sustainability experience in the chemical industry in China.



Wander Meijer
Director Asia Pacific
GlobeScan

+25 years of management and consultancy experience in Europe, South America and Asia Pacific (since 1998).

Agenda

- Introduction
- Global Perspective
- State of Sustainability in Asia: Panel
- Asia Pacific Trends
- Q&A

Introduction to GlobeScan

GlobeScan is an **evidence-led** strategy consultancy focused on **stakeholder intelligence and engagement**, offering a suite of specialist research and advisory services. GlobeScan's overarching purpose is to help our clients **redefine what it means to be in business.**

Core Practice Areas



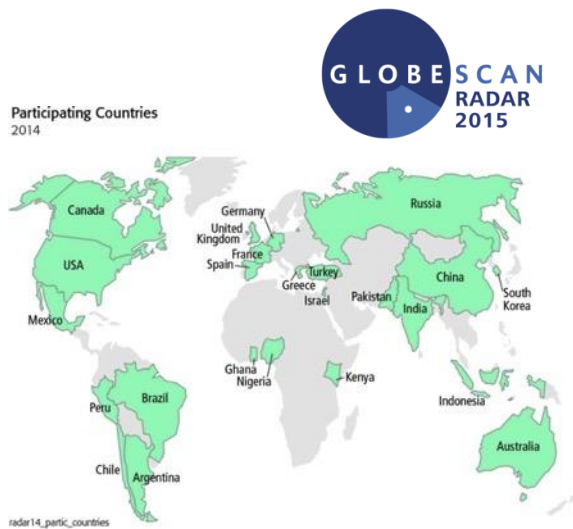
Some of Our Clients



Global Trends – Methodology

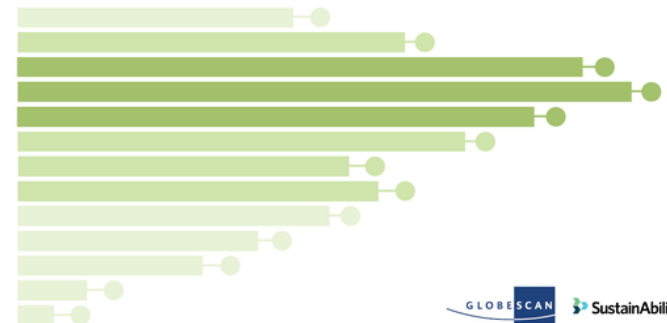
Global public opinion tracking
(n=24,000)

Global sustainability expert tracking
(n=887)



The 2015 *Sustainability Leaders*

A GlobeScan/SustainAbility Survey



Key Findings: Global Perspective

- Ongoing concerns and volatility in global public opinion across many metrics
- People remain uncertain as to what many companies stand for
- Trust remains a critical element to drive forward the change required to create the world we all want

LEADERSHIP

LEADERSHIP RECOGNIZED

Value of 'recognized leadership': three equities



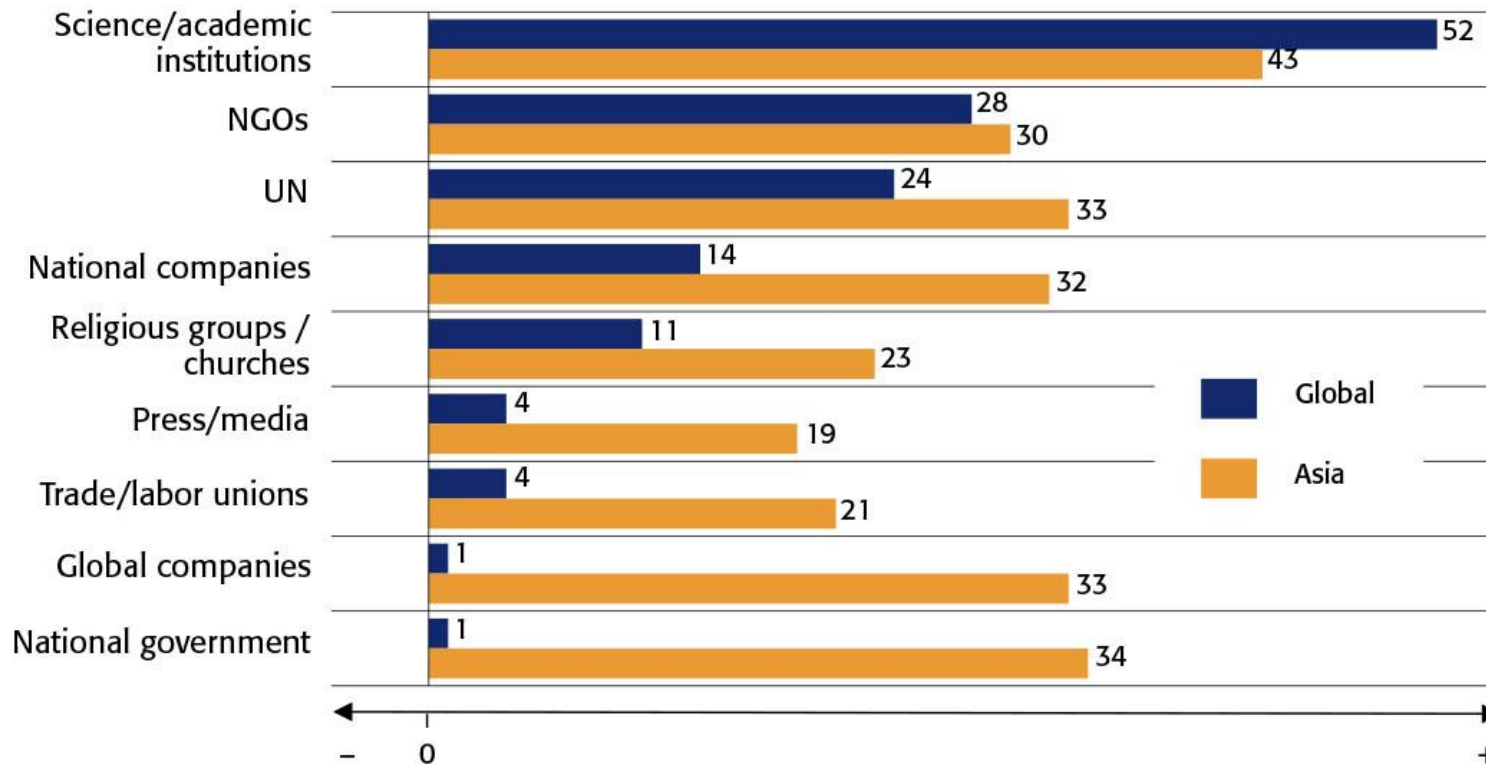
Asian Research Findings



National governments and global companies are the least trusted institutions globally

Trust in Institutions

Net Trust,* Average of 22 Countries** vs Average of Asian Countries***, 2015



R15_3_net_global_asia

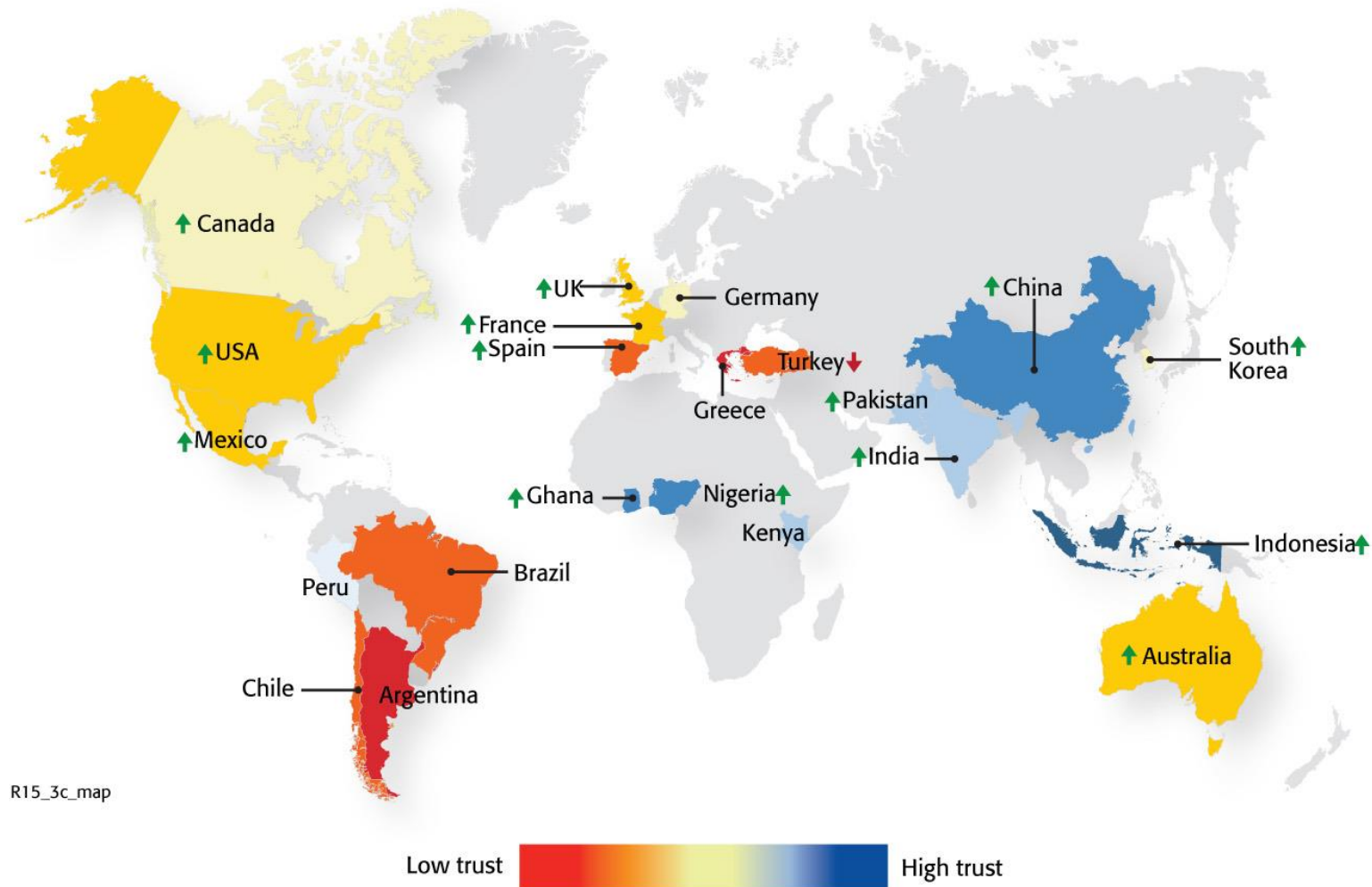
*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

**Includes Argentina, Australia, Brazil, Canada, Chile, China, France, Ghana, Germany, Greece, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Pakistan, Peru, South Korea, Spain, Turkey, UK and USA. Not all countries were asked in all years.

***Includes China, India, Indonesia, Pakistan and South Korea

Levels of trust in global business differ greatly – Asia significantly more positive

Trust in Global Companies
Net Trust,* by Country, 2015



R15_3c_map

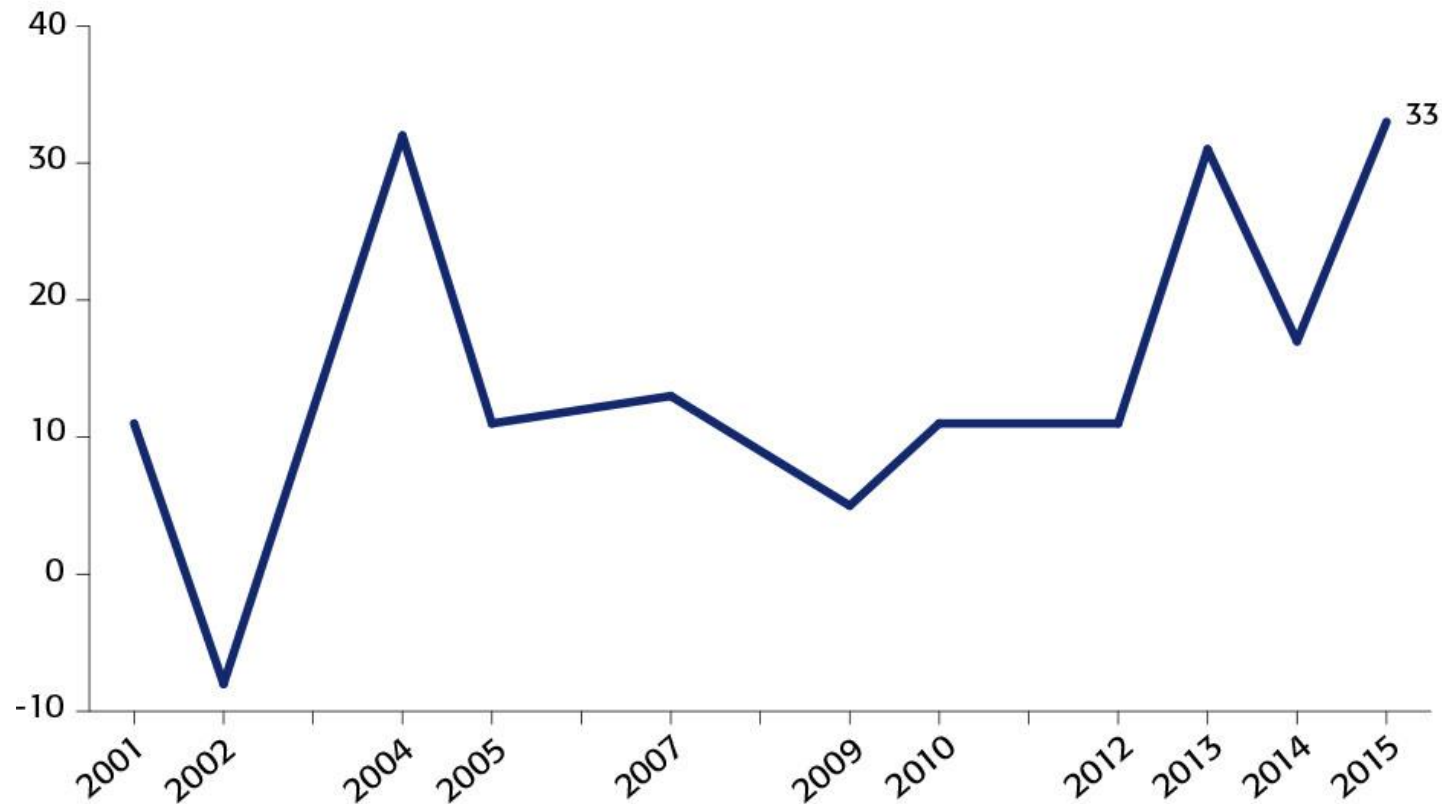
*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

↑↓ Arrows represent shift from 2014

Trust in global business has never been higher in Asia

Trust in Global Companies

Net Trust*, Asia**, 2001–2015



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

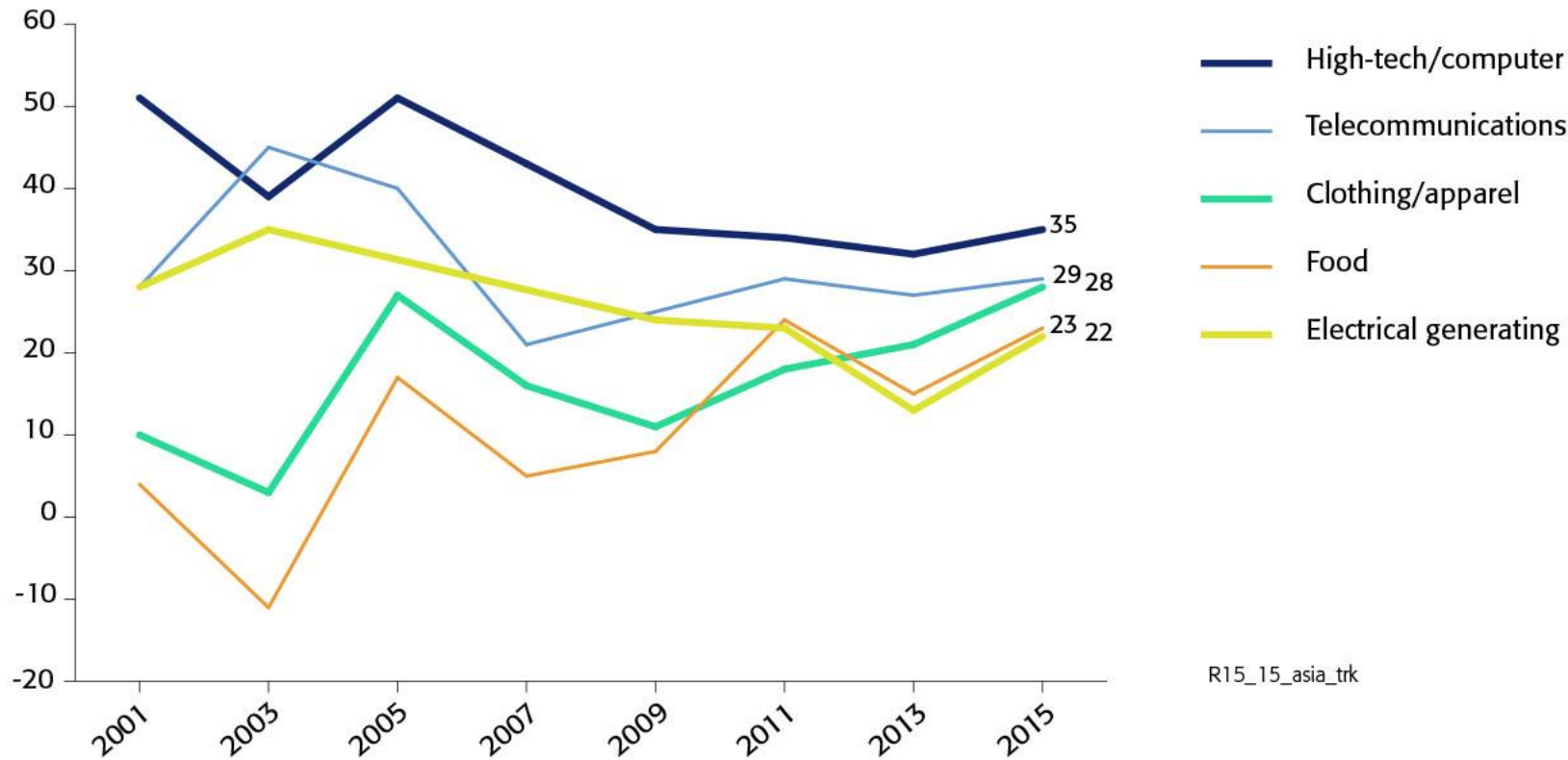
R15_3c_net_asia_trk

**Includes China, India, Indonesia, Japan, Pakistan, Philippines and South Korea.
Not all countries were asked in all years.

Recent increases in CSR reputation of key industries, but long term declines in IT, telecom and electrical generation sectors

CSR Performance of Industry Sectors

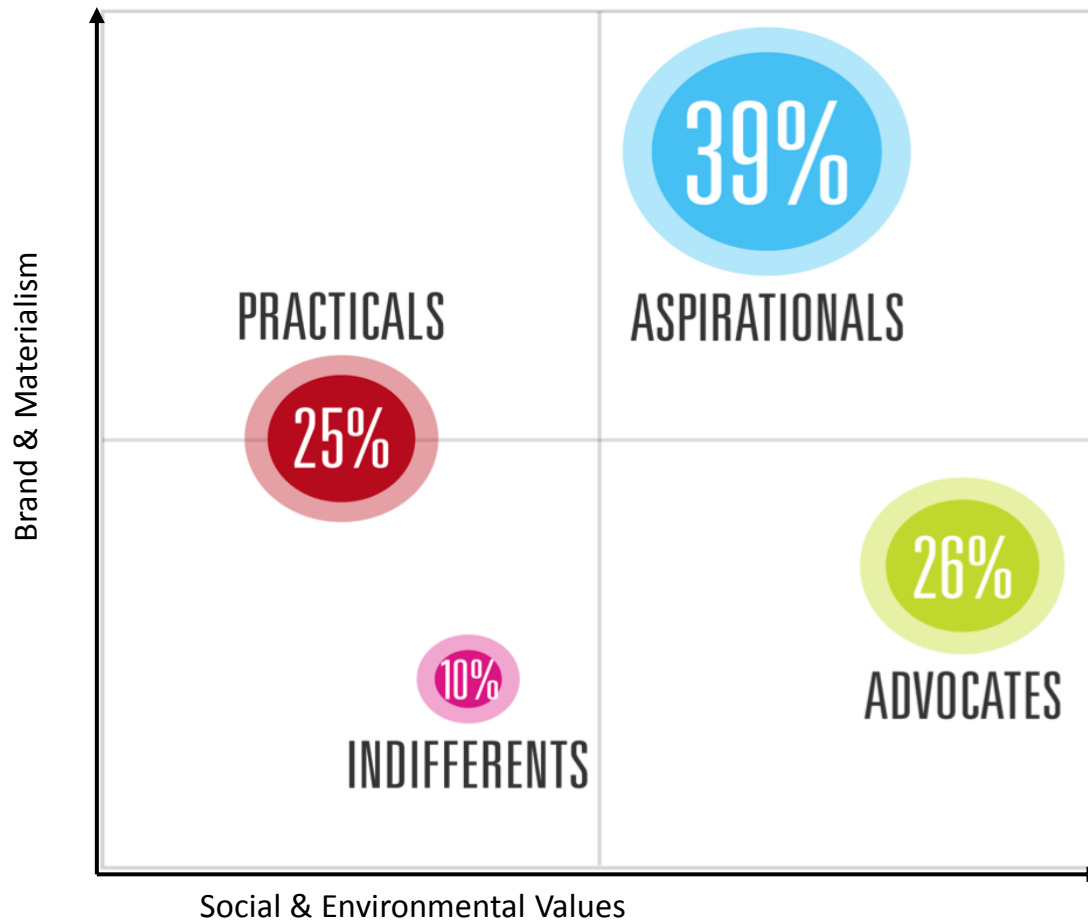
Net Rating*, Asia**, 2001–2015



*"Among the best" and "Above average" minus "Below average" and "Among the worst"

**Includes China, India, Indonesia, Japan, Pakistan, Philippines and South Korea. Not all countries were asked in all years.

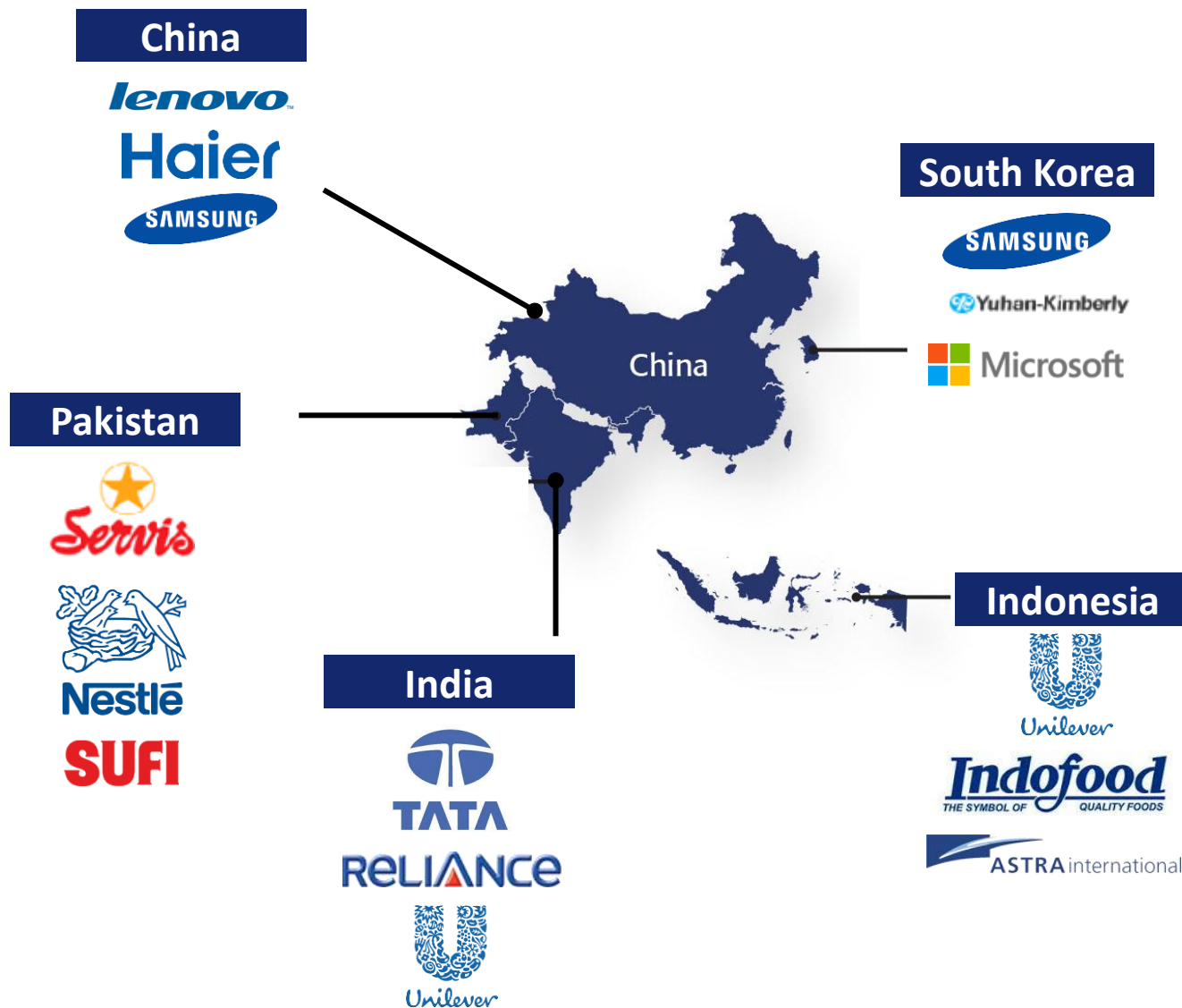
A receptive and engaged segment of consumers, ready for purposeful companies



Aspirationals are everywhere and over-represented in Asia



National flagship brands dominate top socially responsible brands in most Asian countries



The 2015 *Sustainability Leaders*

A GlobeScan/SustainAbility Survey

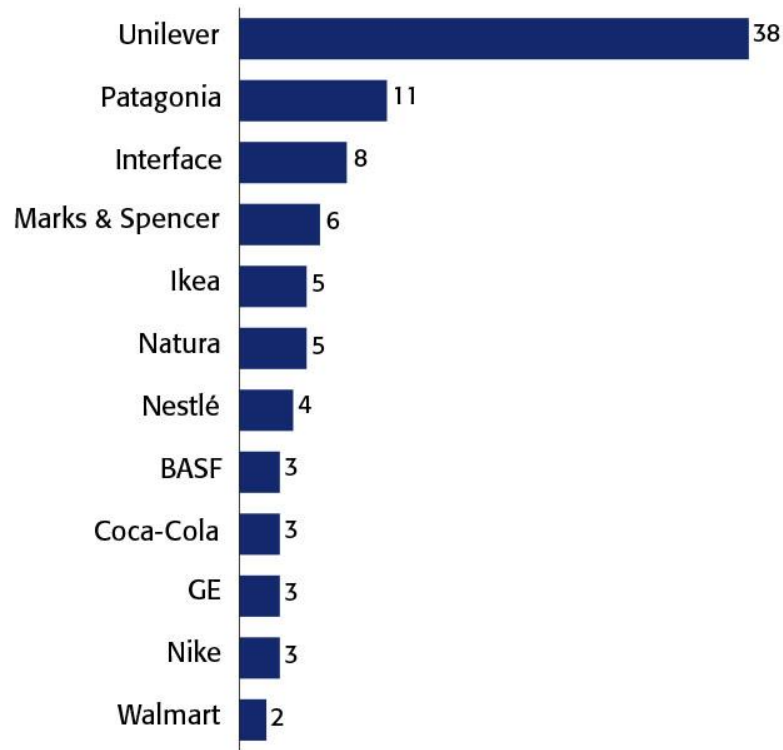


Asian stakeholders have similar views to Western stakeholders when it comes to leadership companies



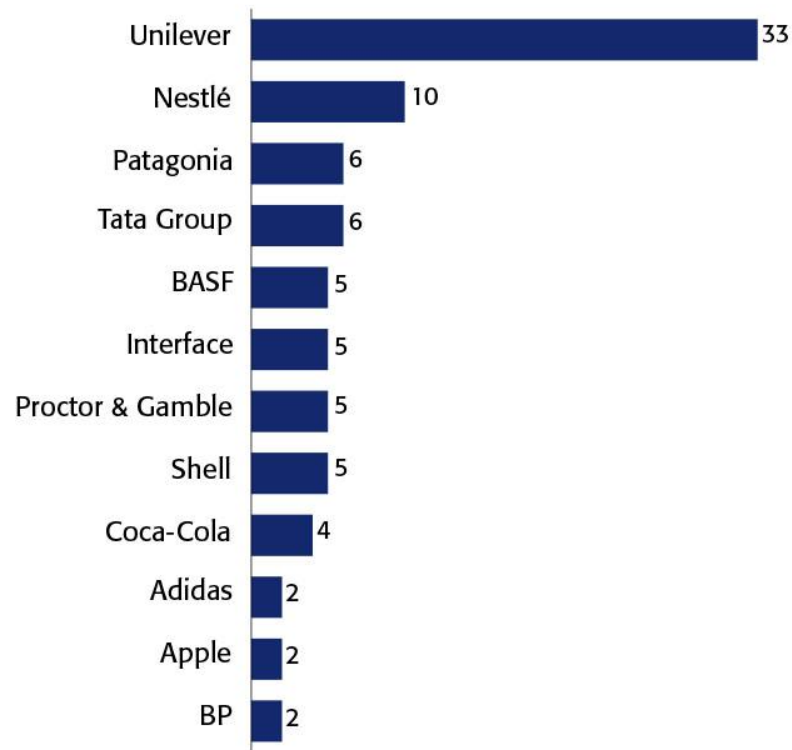
“What specific companies do you think are leaders in integrating sustainability into their business strategy?”

Leading Companies, Unprompted,
% of Experts (Global), 2015



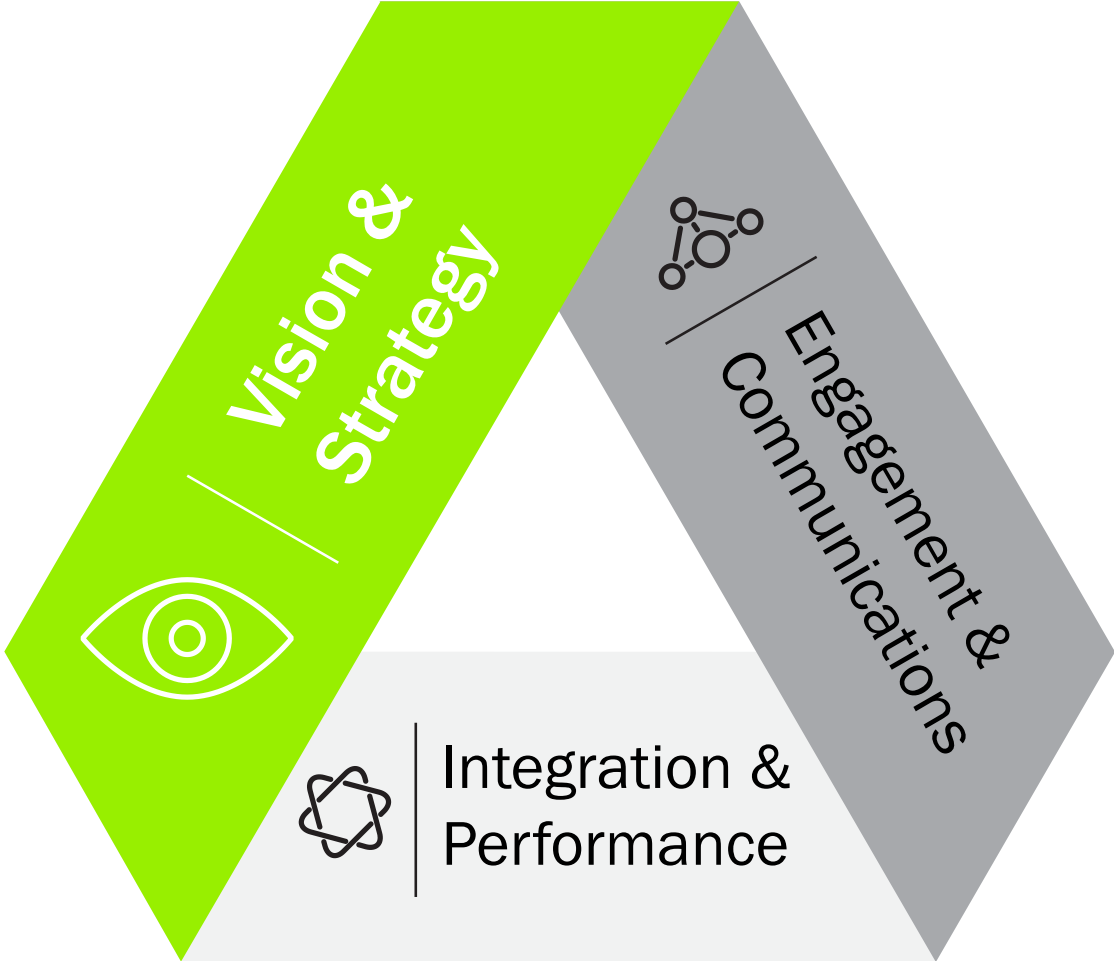
GSS_3_global_bar

Leading Companies, Unprompted,
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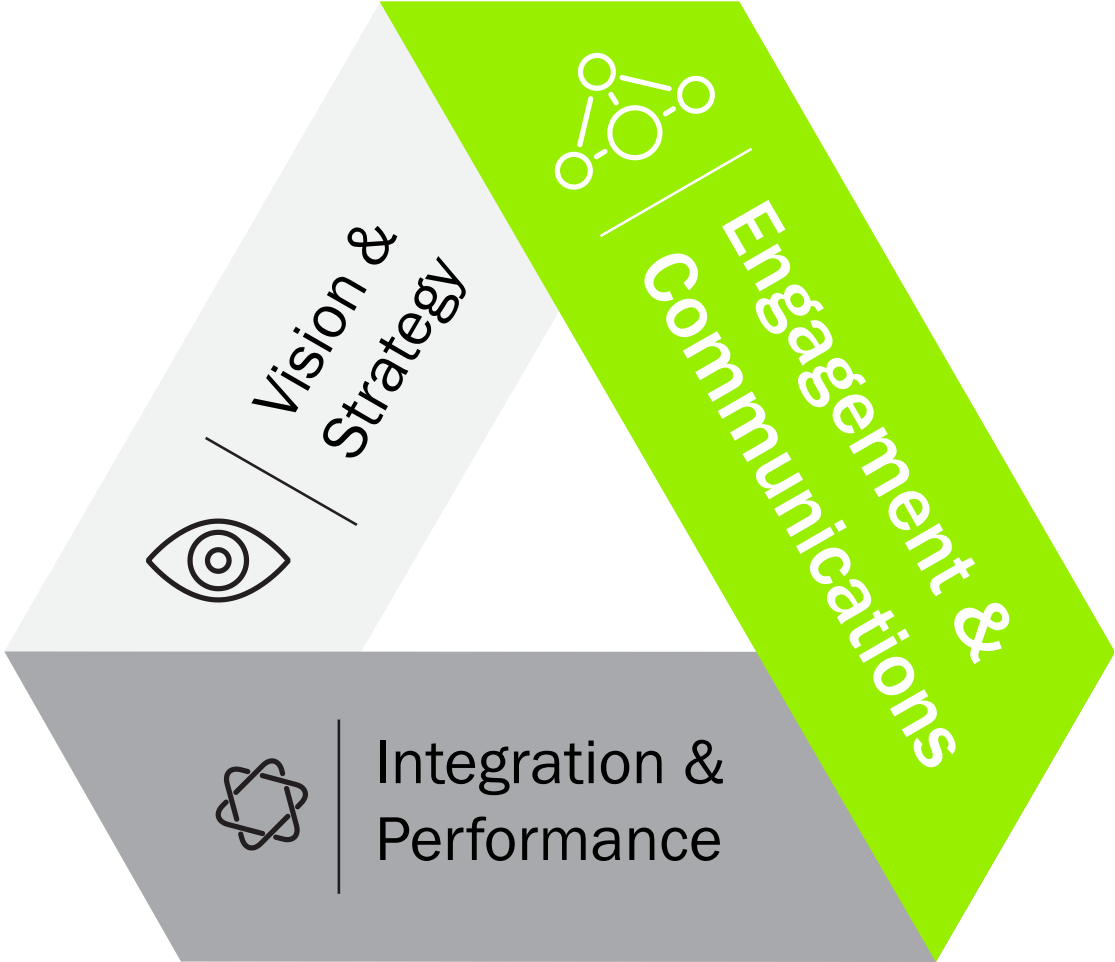


GSS_3_asia_bar

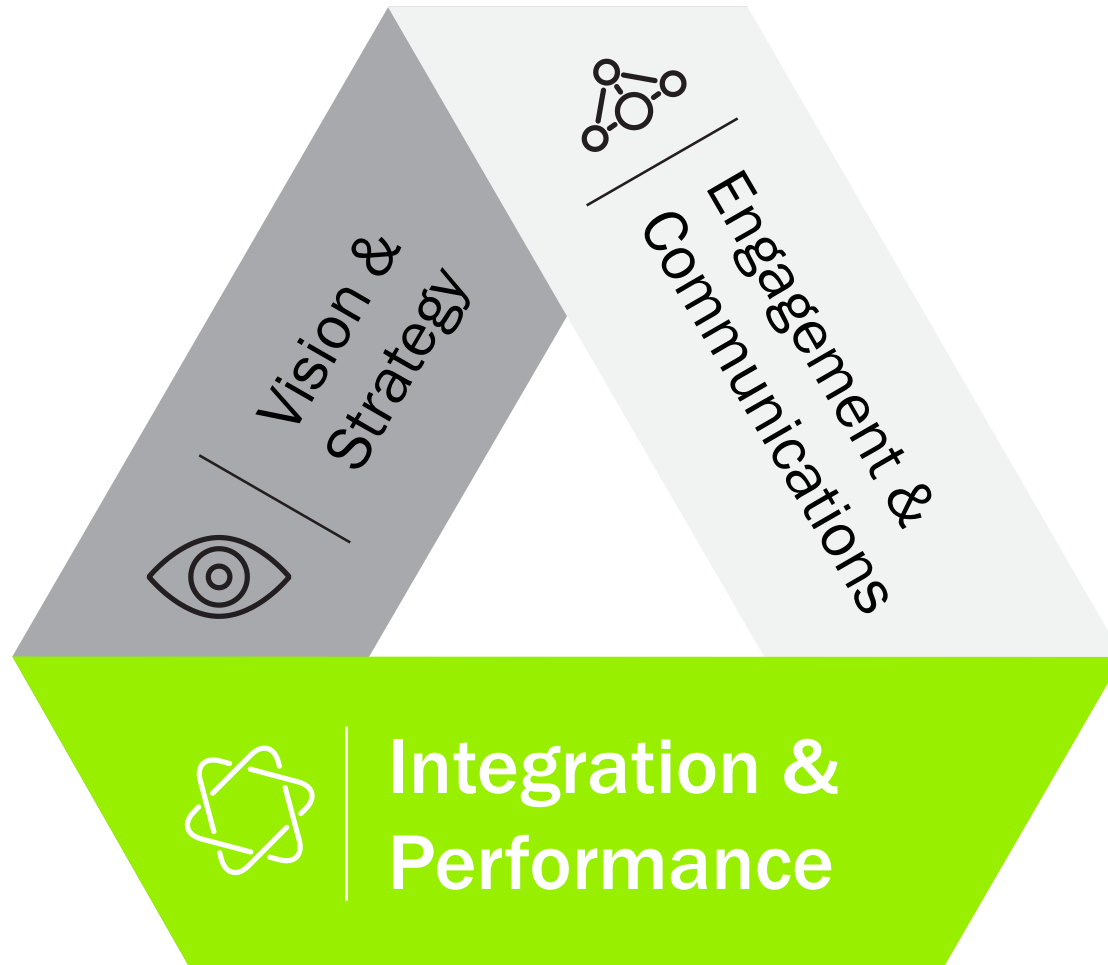
Three pillars of recognized leadership



Three pillars of recognized leadership



Three pillars of recognized leadership



Our Expectations for 2016 – and Beyond

- Opportunity for bolder leadership in Asia, given scope of challenges and relatively high levels of trust
- Many companies need to pro-actively define their Purpose and engage stakeholders
- In Q1, GlobeScan will survey the public and mid 2016, we will survey the stakeholders on their experiences and expectations

Q & A for our Panelists



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Caroline Holme

Director
London
+44 (0) 20 7960 5114
caroline.holme@globescan.com

Silvia Thompson

Senior Consultant
Sao Paulo
+55 11 99989 8821
silvia.thompson@globescan.com

James Morris

Director
San Francisco
+1 415-625-9709
james.morris@globescan.com

Femke de Man

Director
Toronto
+1 416-561-8523
femke.deman@globescan.com

Anneke Greyling

Director
Cape Town
+27 21 782 5541
anneke.greyling@globescan.com

Wander Meijer

Director
Hong Kong
+852 9723-9092
wander.meijer@globescan.com

www.globescan.com