

CSR Reputation Auto Industry | 2013

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GLOBESCAN

evidence and ideas. applied

For more information, please contact:

Shannon Stevenson

External Relations Manager

shannon.stevenson@globescan.com

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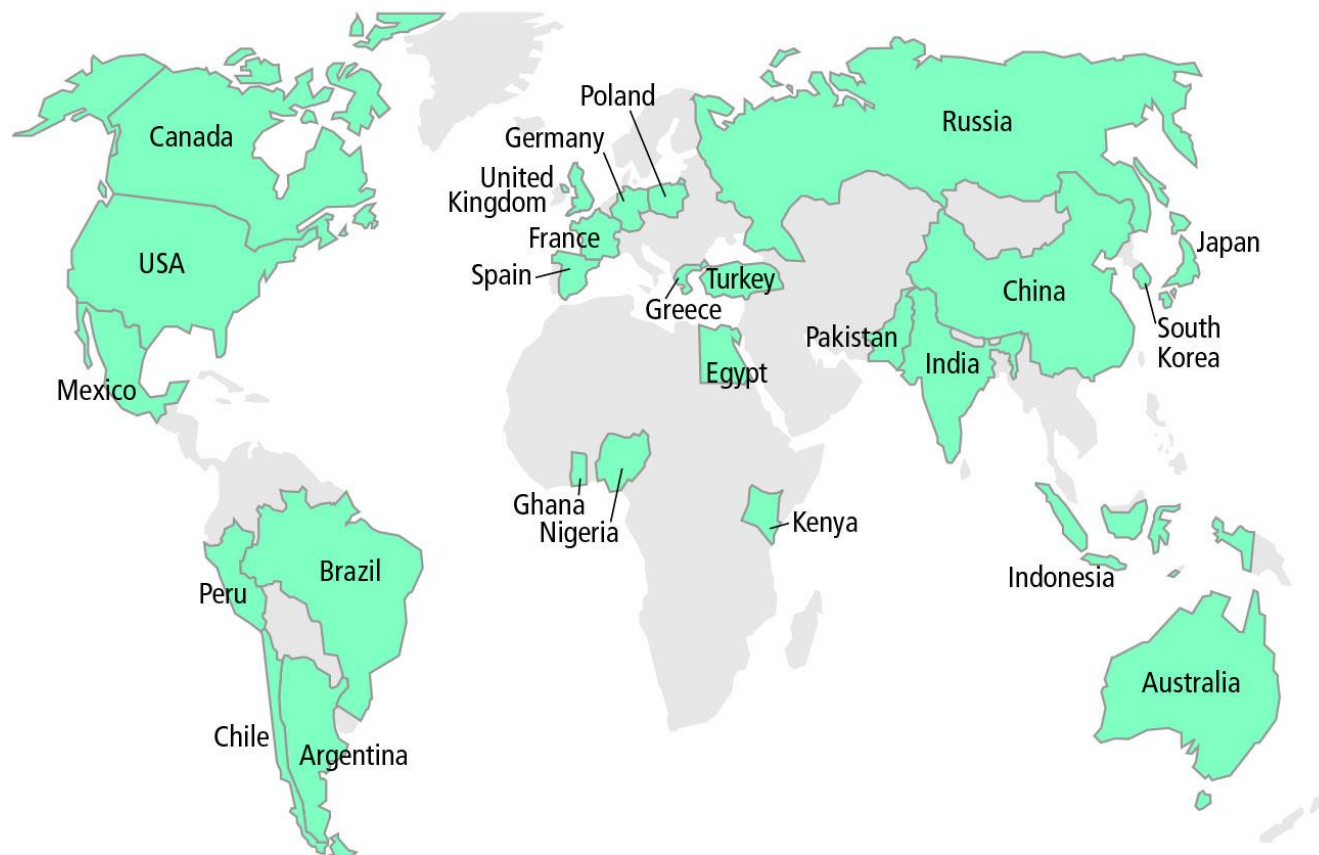
tel: +1 416.962.0707

fax: +1 416.920.3510



Methodology

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.

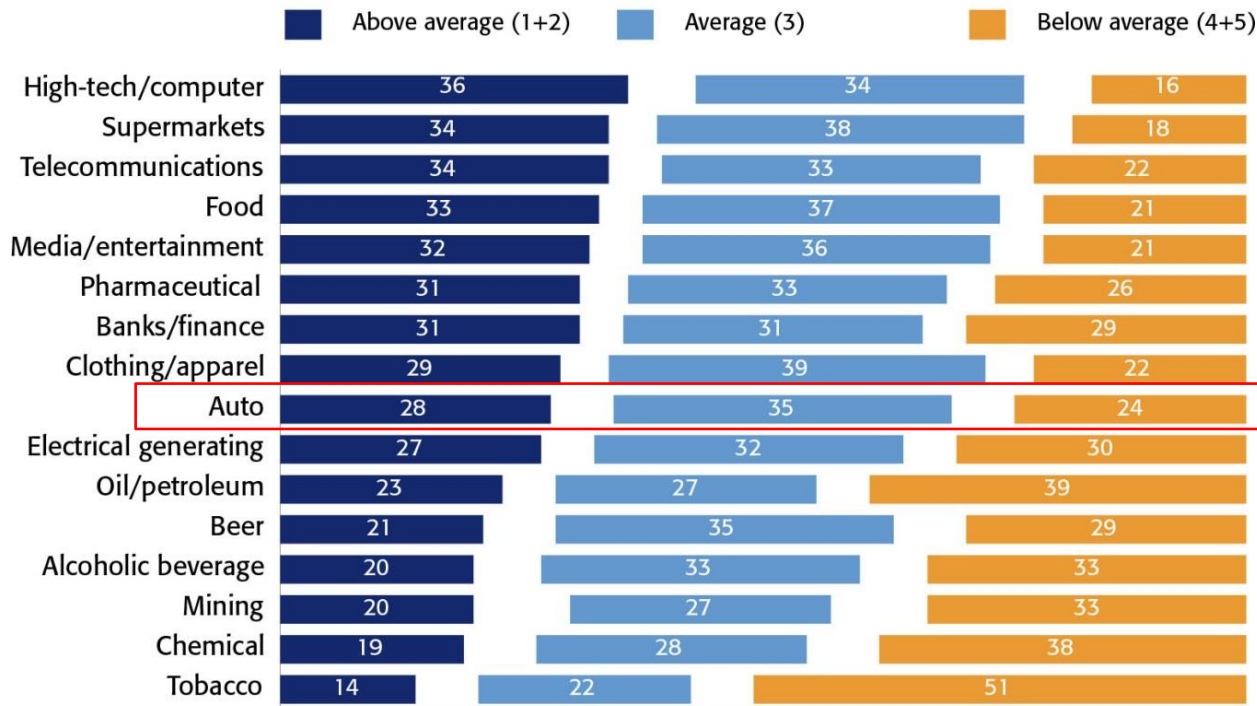
Key findings

- The auto industry's perceived CSR performance ranks in the middle relative to other industries in 2013. Perceptions of the industry have fallen slightly since 2011 and show an overall decline since 2001, as global views have not fully recovered from the low reached during the economic downturn. Declining views may also be attributed to increasing awareness of the environmental implications of car travel.
- Only in Germany is the industry considered the most responsible. However, many other countries give the industry a high ranking relative to other industries, and the picture varies strongly between countries. Australia and Turkey rank the industry 2nd and 3rd overall, respectively, while Canada, France, Russia, South Korea, and Peru rank the auto industry very poorly relative to other industries.
- Net ratings of the industry's perceived CSR performance are most positive in Pakistan, which is unsurprising given the large and increasing share of the manufacturing economy and overall employment contributed by the industry.
- Germany is the only developed nation to give the auto industry a net positive rating for CSR. The UK and France have seen a drop in perceived responsibility, while the US auto industry has recovered significantly from the dramatic drop in CSR ratings it experienced in the post-bailout climate. It is the only developed market to see a significant increase in its net rating of the industry, accompanying the developing markets of Nigeria, Ghana, Kenya, and Turkey.
- However, many respondents, unprompted, say they would like to see more responsible products from the auto industry, a figure that has increased slightly since 2011.
 - This may be influenced by the publicity around Tesla Motors and the increasing range of hybrid and environmentally friendly vehicles, which has increased public expectations of further innovation.
 - Earlier research by GlobeScan indicates that the most important issue that the public would like the auto industry to focus on is its environmental impact, including air pollution from emissions and its contribution to climate change. Other top issues associated with environmental impact include making efforts to start using alternatives to fossil fuels and to develop better fuel efficiency. Affordability is also a key issue associated with public perceptions of the industry.

Auto industry mid-ranked on its perceived CSR performance

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013



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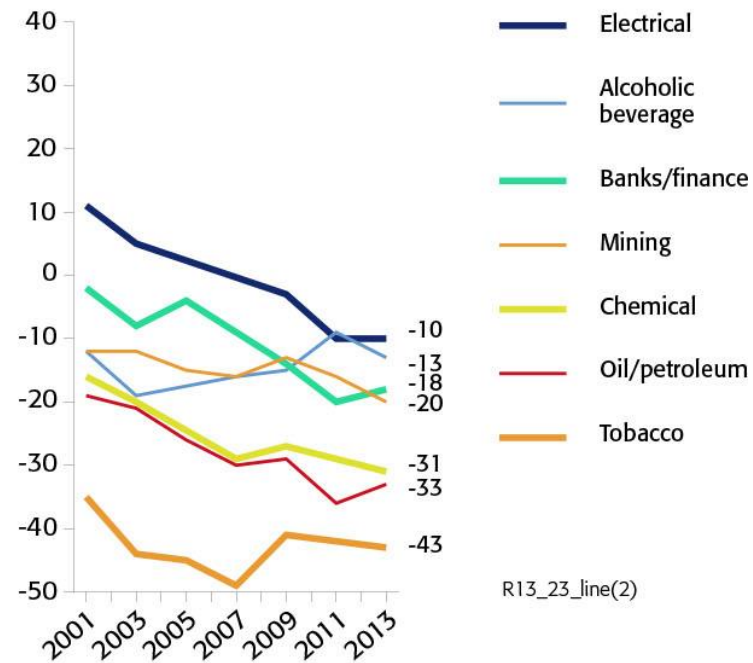
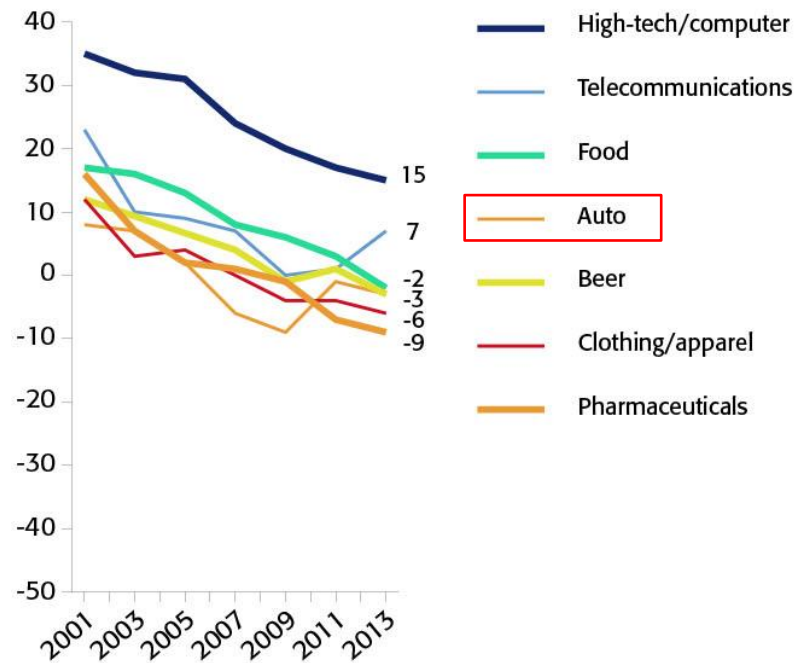
The white space in this chart represents "Depends," "No opinion," and "DK/NA."

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

Perceptions of auto industry have not fully recovered from low reached during economic downturn

CSR Performance of Industry Sectors

Net,* Average of 11 Countries,** 2001–2013



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

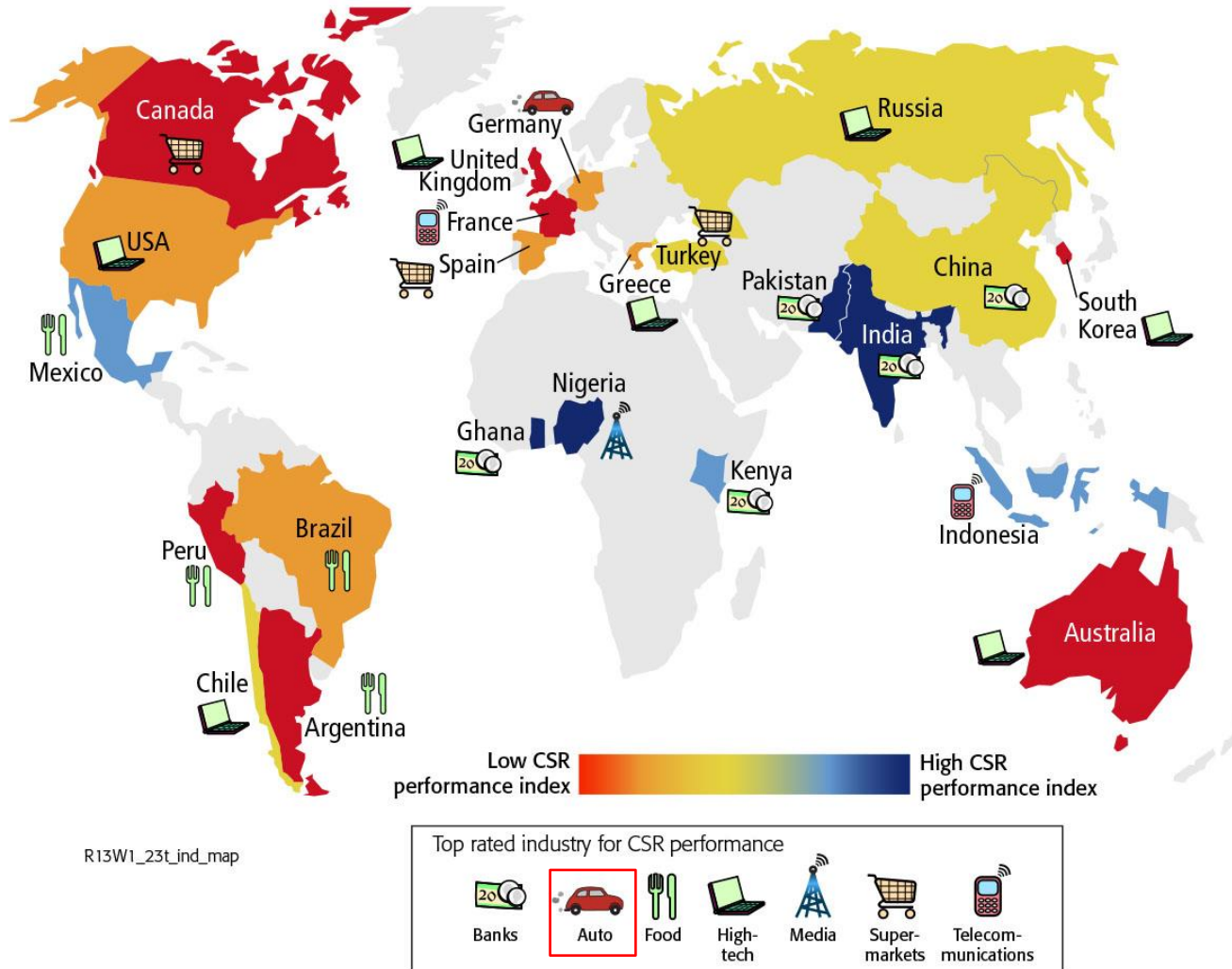
**Includes Australia, Canada, Chile, China, France, Germany, Mexico, Russia, Turkey, UK, and USA

The following sectors were not asked in France in 2005: telecommunications, banks, auto, chemical, electrical, beer and alcoholic beverage. Telecommunications, banks/finance not asked in France in 2006.

Auto industry seen as most responsible in Germany

CSR Performance and Highest Rated Industry

By country, 2013



Q23bt. Please rate each of the following types of companies on how well they fulfill their responsibilities to society. Compared to other types of companies, would you say [INSERT COMPANY TYPE] are...?

Auto industry's CSR perception ranking varies strongly across markets



CSR Performance of Industry Sectors

Ranking by Net* Rating, by Country, 2013

	Argentina	Australia	Brazil	Canada	Chile	China	France	Germany	Ghana	Greece	India	Indonesia	Kenya	Mexico	Nigeria	Pakistan	Peru	Russia	South Korea	Spain	Turkey	UK	USA
High-tech/computer	2	1	7	2	1	2	5	2	9	1	3	3	7	5	6	7	4	1	1	3	2	1	1
Supermarkets	3	8	5	1	5	7	7	7	8	4	7	6	4	3	3	2	2	2	12	1	1	6	2
Telecommunications	11	3	10	4	7	3	1	5	5	2	10	1	3	6	4	8	9	2	5	10	4	2	3
Food	1	4	1	7	2	15	10	11	3	6	7	9	8	1	2	6	1	9	9	2	6	8	4
Media/entertainment	7	6	2	5	9	4	2	4	3	12	2	11	2	4	1	3	7	4	4	7	10	5	11
Pharmaceutical	4	5	3	12	15	13	8	8	2	9	4	5	10	2	6	9	4	9	7	4	6	3	10
Banks/finance	10	10	8	8	12	1	13	15	1	14	1	2	1	12	5	1	6	8	3	16	8	15	12
Clothing/apparel	5	9	11	11	4	6	9	9	6	5	5	10	5	7	6	4	3	7	6	5	5	9	9
Auto	8	2	9	10	7	7	11	1	10	7	6	6	9	8	9	5	13	11	12	6	3	7	7
Electrical generating	12	12	6	9	14	10	3	12	15	10	11	4	5	9	12	14	8	5	2	9	9	11	5
Oil/petroleum	14	15	4	15	11	5	15	16	13	15	9	8	13	15	11	10	14	12	14	15	10	14	15
Beer	6	7	12	3	6	9	4	2	11	2	15	16	12	10	14	16	10	14	8	11	12	4	6
Alcoholic beverage	8	10	13	6	10	11	6	6	12	8	14	15	11	11	15	13	12	16	9	13	15	10	8
Mining	15	13	14	13	3	15	12	10	14	11	11	12	14	16	13	11	15	6	9	12	14	12	13
Chemical	13	14	15	14	13	12	14	14	7	16	13	13	16	13	10	12	11	13	15	8	13	13	14
Tobacco	16	16	16	16	16	14	16	13	16	13	16	14	15	13	16	15	16	15	16	14	16	16	16

R13_CSR_table_2

Light green: Increase in "Among the very best" and "Above average" ratings compared to 2011

Red: Decrease in "Among the very best" and "Above average" ratings compared to 2011

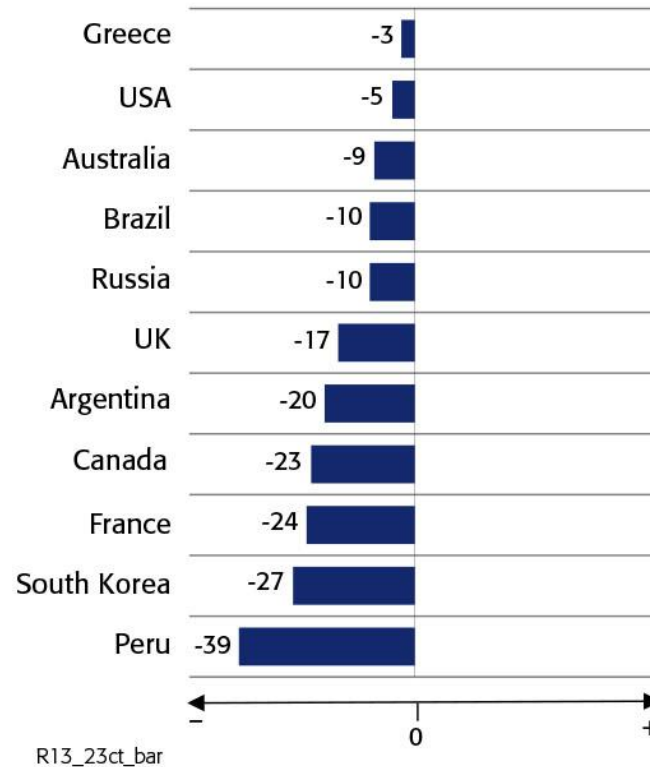
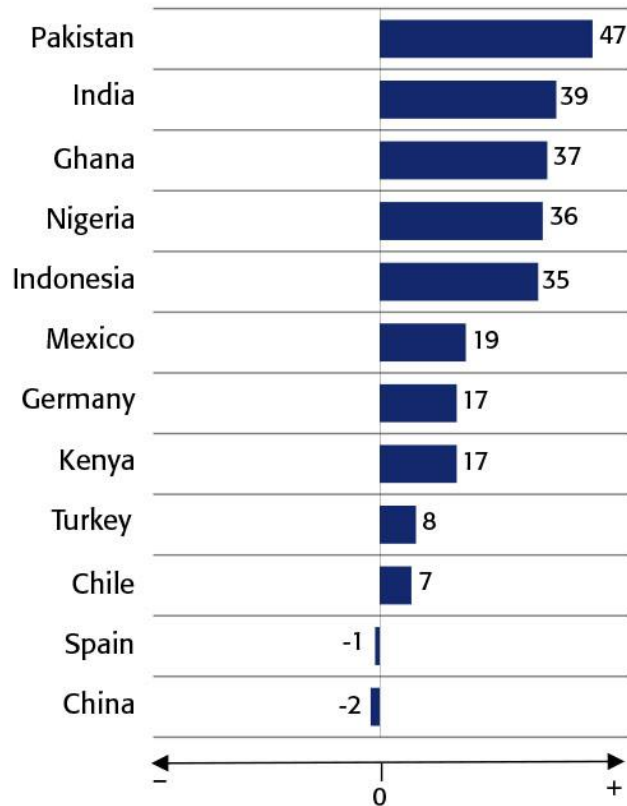
Grey: Tracking data not available



Germany breaks with developed nations to give auto industry net positive rating on perceived CSR

CSR Performance of the Auto Industry

Net Ratings, * by Country, 2013



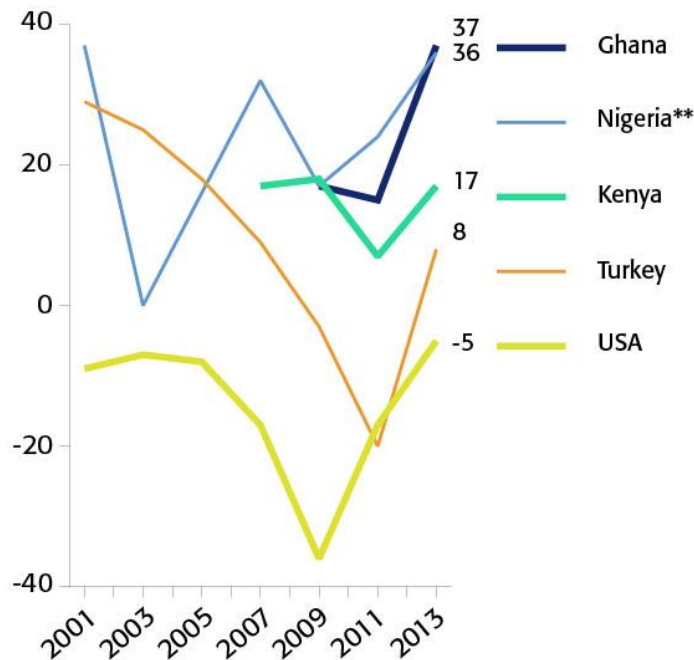
*Net ratings equal "Among the best" and "Above average" minus "Below average" and "Among the worst."

French ratings of auto industry's CSR efforts plummet amid Renault, Peugeot job losses

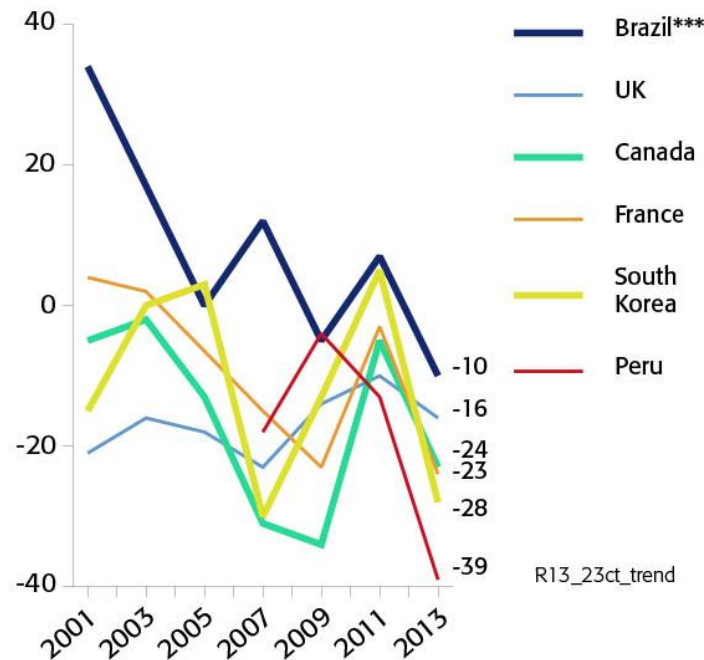
CSR Performance of Auto Companies

Net Ratings,* Trends: 2001–2013

Increases and stable



Decreases



*Net ratings represent "Among the very best" and "Above average" minus "Below average" and "Among the very worst."

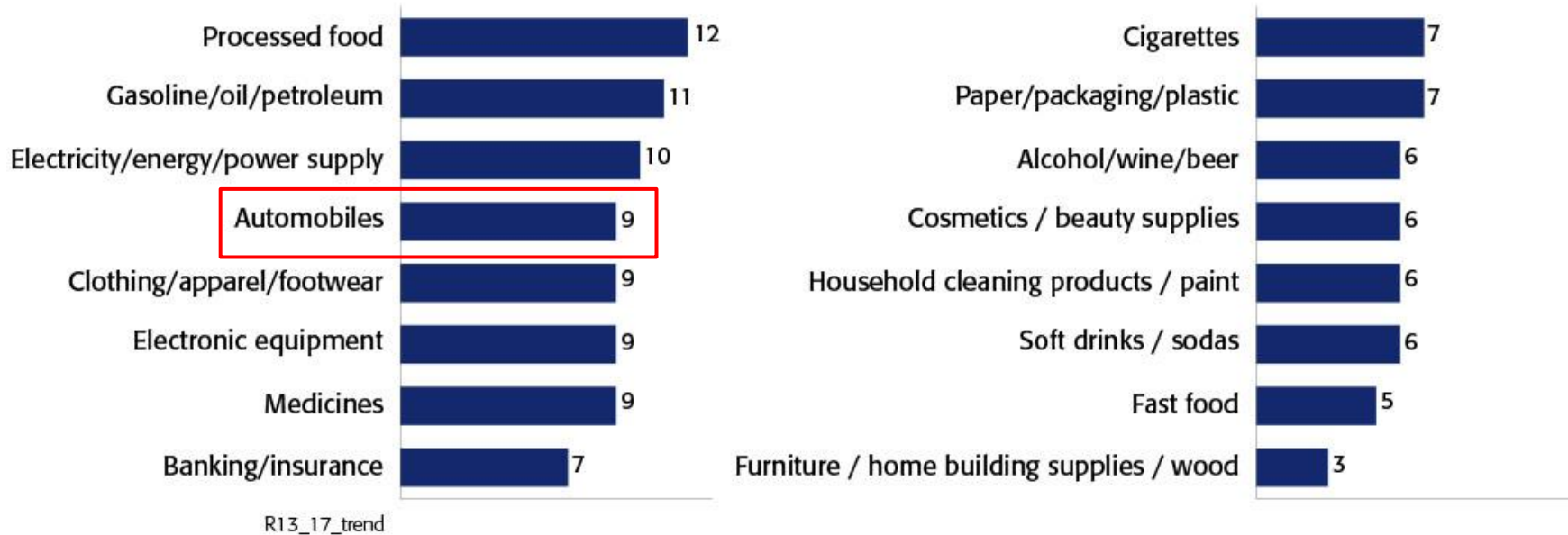
**Not asked in 2005

***Not asked in 2003

Public would like to see more responsible products from the auto industry

CSR Product Offerings Most Wanted

Unprompted, Average of 18 Countries,* 2013

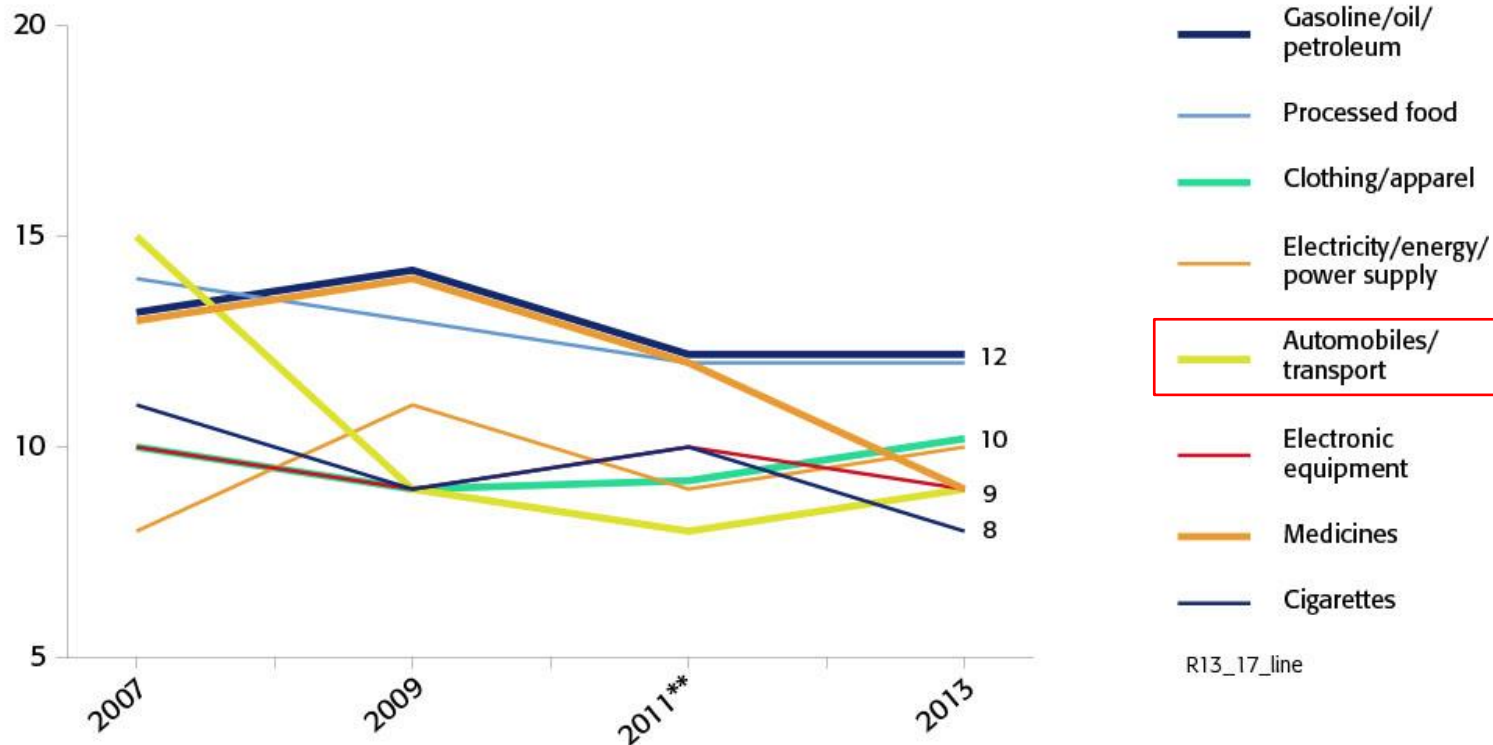


*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

Slight rise in numbers who want to see more responsible products from auto industry

CSR Product Offerings Most Wanted

Unprompted, Average of 13 Countries,* 2007–2013



*Includes Argentina, Canada, Germany, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

**Canada not included

Global Societal Context to Inform Decisions & Strategy

Global organizations need greater insight on how to better manage risks and capitalize on opportunities in uncertain times, build trust with their stakeholders and society, and exert a greater influence in shaping their external context.

GlobeScan Radar is a program of evidence and insights for informing decision-making and strategic direction. Radar draws upon GlobeScan's unique database of over a decade of global public opinion tracking (20-30 countries annually) around business and its role in society.

A partnership with GlobeScan through Radar provides you and your team with access to briefings and data, insight from societal trends on how companies are living up to public expectations, and how your peers in other sectors are handling potential threats to their reputation.

A GlobeScan Radar briefing will give you a comprehensive understanding of the social context in which your business operates around the world to guide communications, issues management, and initiative development. Through performance ratings, it will help you identify how views of your sector are changing, and which sectors and businesses are the emerging leaders and laggards.



For more information, please contact:

Shannon Stevenson

External Relations Manager

shannon.stevenson@globescan.com



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