

# CSR Reputation Clothing Industry | 2013

IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.



evidence and ideas. applied

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© October 2013

Project: 2713, GlobeScan®

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evidence and ideas. applied

# 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.

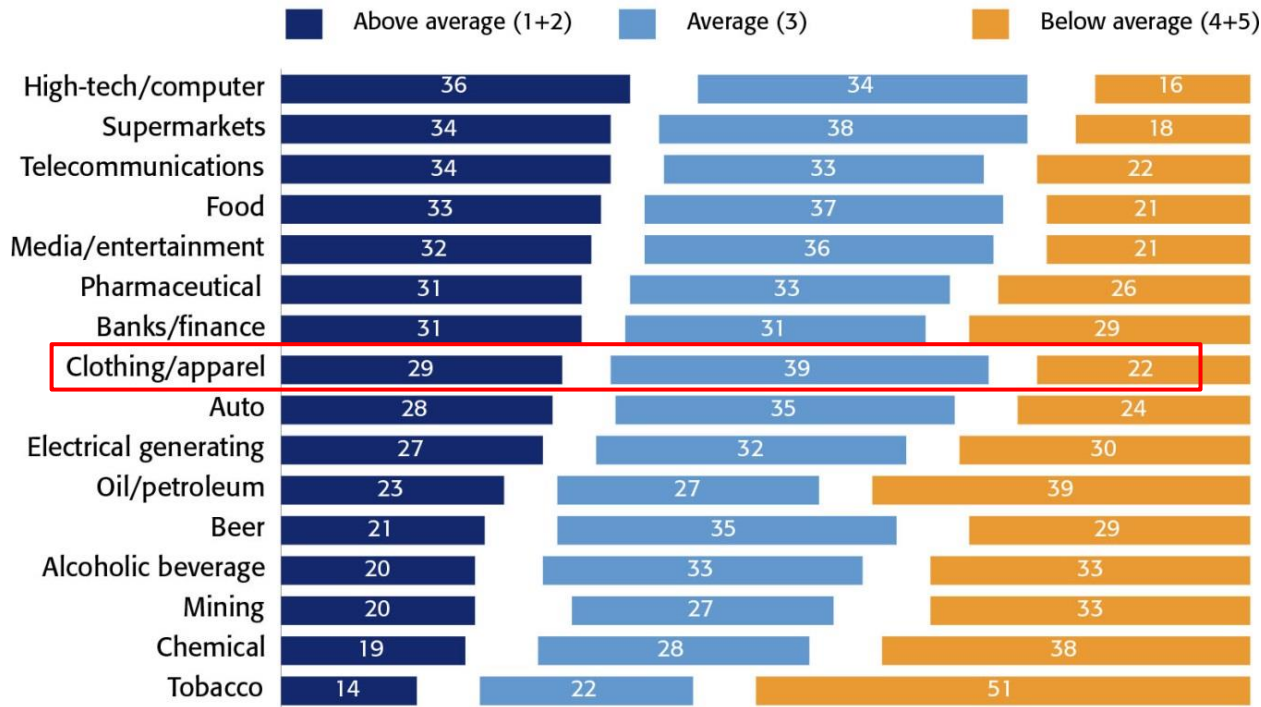
## Key findings

- Though the clothing industry's CSR performance is viewed as middling, its net performance rating has fallen since 2011, continuing a long term decline.
- In no country is the clothing industry the top ranked CSR performer, though perceptions do vary widely across countries.
- Though the industry's perceived performance has improved in some countries since 2011, it has fallen in many others, particularly Asian and Western ones. This may be linked to high profile supply chain issues.
- In general, the industry's CSR efforts are much more favourably perceived in developing nations compared to developed ones.
- Nine per cent of respondents said, unprompted, that they would like to see more socially responsible clothes, more than said the same about cigarettes. This proportion has risen in the past two years.

# Clothing industry's CSR performance is middling compared to other industries

## CSR Performance of Industry Sectors

Average of 23 Countries,\* 2013



R13\_23\_likert

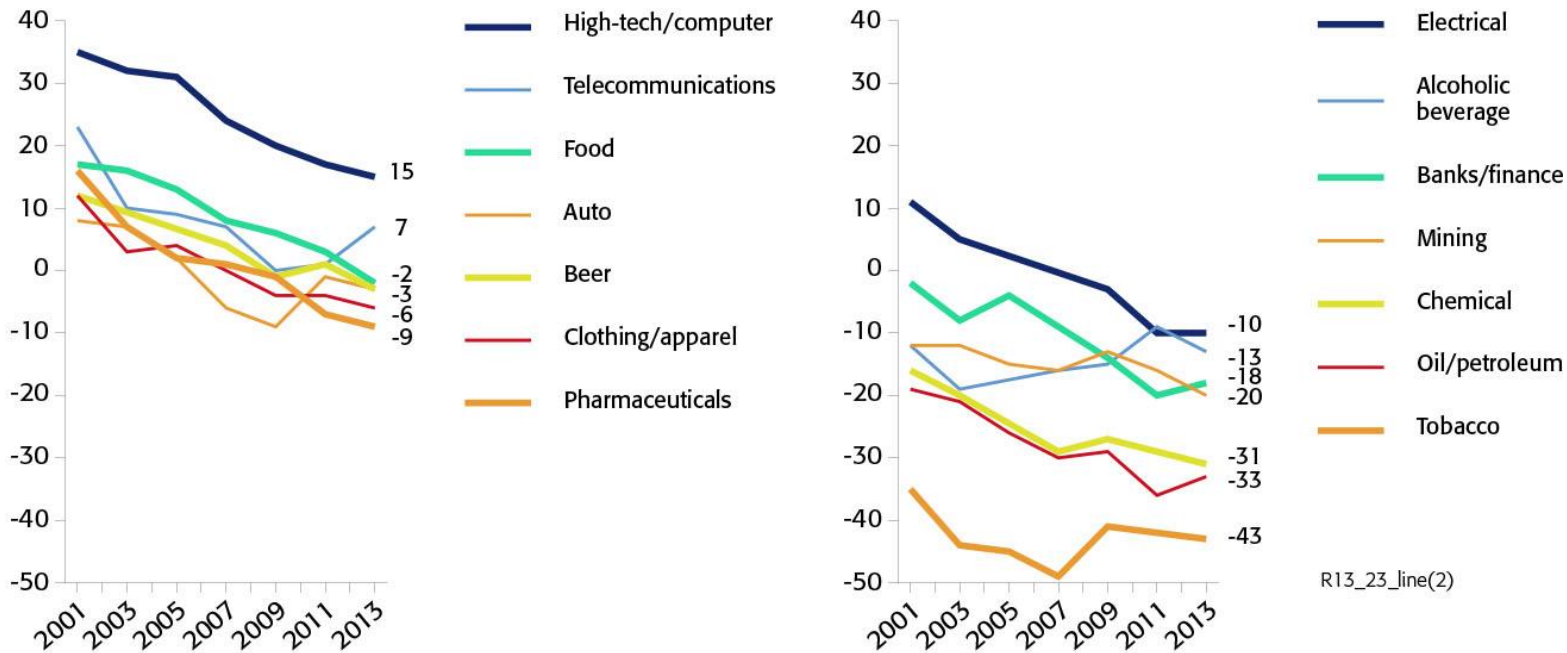
The white space in this chart represents "Depends," "No opinion," and "DK/NA."

\*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

# Clothing industry's CSR perception reaches new low

## 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.

# Wide variation in perceptions of clothing industry's CSR performance

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

■ Increase in "Among the very best" and "Above average" ratings compared to 2011
 ■ Decrease in "Among the very best" and "Above average" ratings compared to 2011
 ■ Tracking data not available

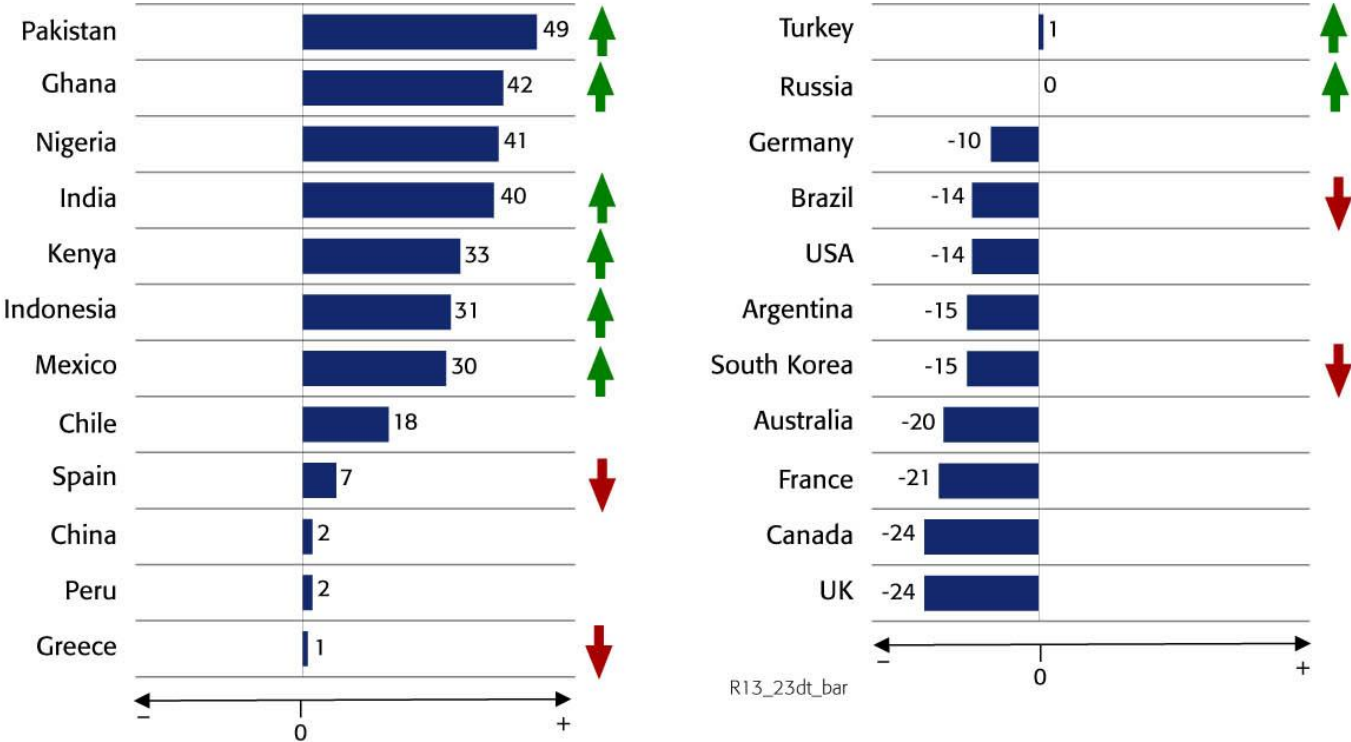
\*Net equals "Among the best" and "Above average" minus "Below average" and "Among the worst." Highlighting refers to a change of 6% or more since 2011.

Q23. 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?

# Developing nations see improving perceptions of the clothing industry's CSR performance

## CSR Performance of the Clothing/Apparel Industry

Net Ratings,\* by Country, 2013



\*Net ratings equal "Among the best" and "Above average" minus "Below average" and "Among the worst."  
 Green arrows indicate an increase of 6% or more in "Among the very best" and "Above average" ratings compared to 2011, while red arrows indicate a decrease of 6% or more.

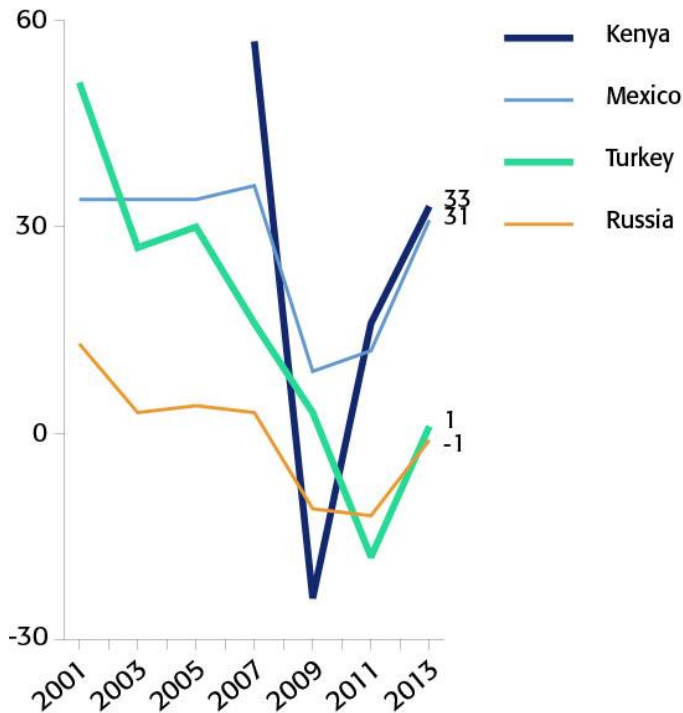


# Falling perceptions in many countries in wake of Bangladesh tragedy

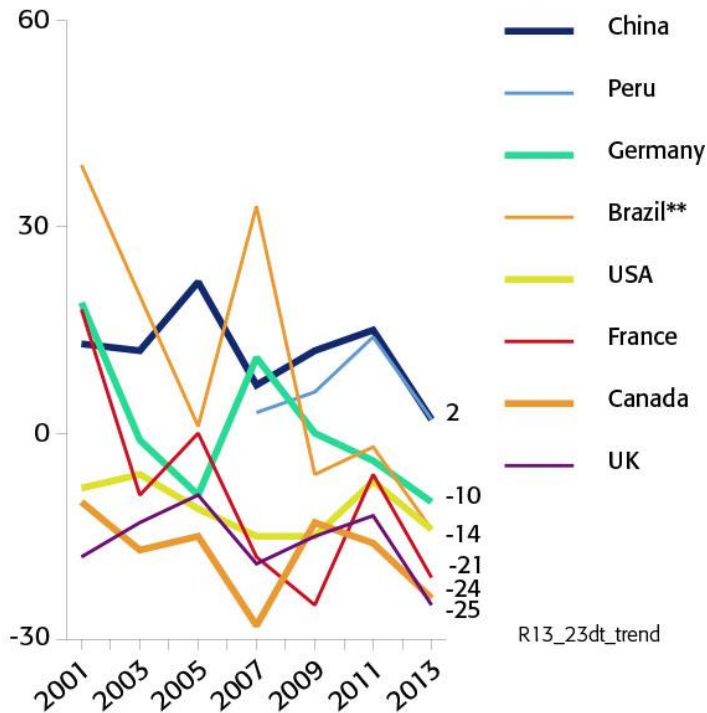
## CSR Performance of Clothing/Apparel Companies

Net Ratings,\* Trends: 2001–2011

### Increases and stable



### Decreases



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

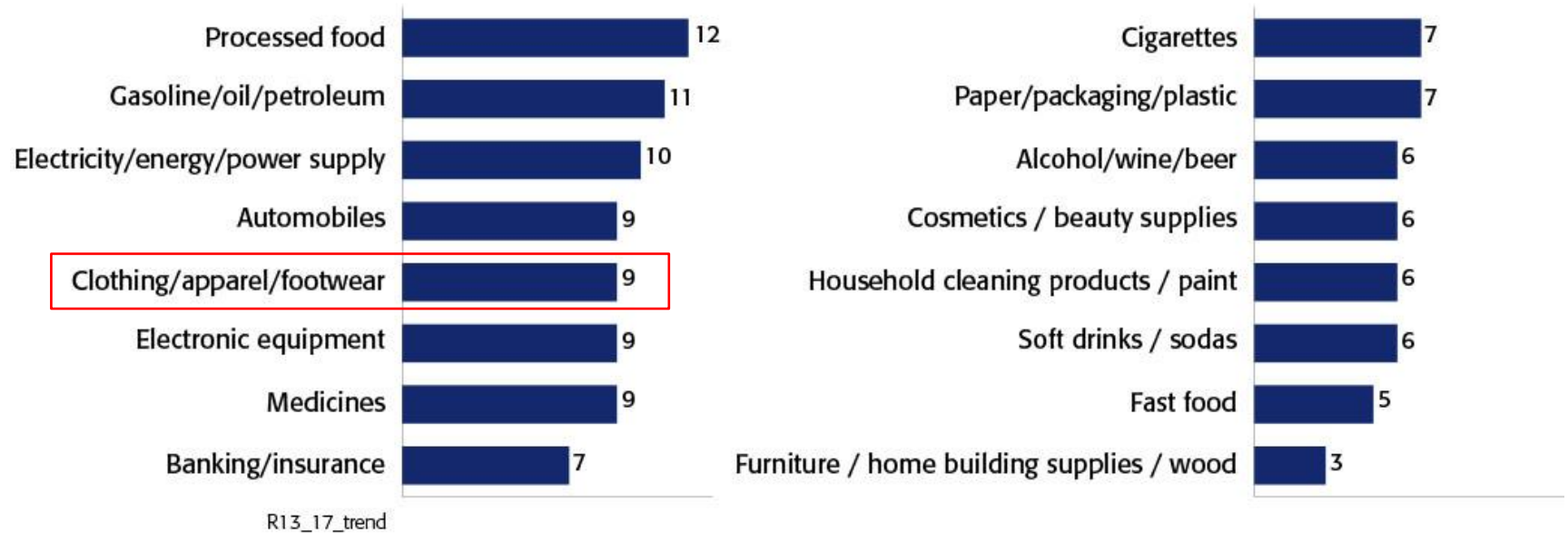
\*\*Not asked in 2003

Q23btd. 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 - Clothing and apparel companies are?

# Nine per cent want to see more socially responsible clothing products

## CSR Product Offerings Most Wanted

Unprompted, Average of 18 Countries,\* 2013

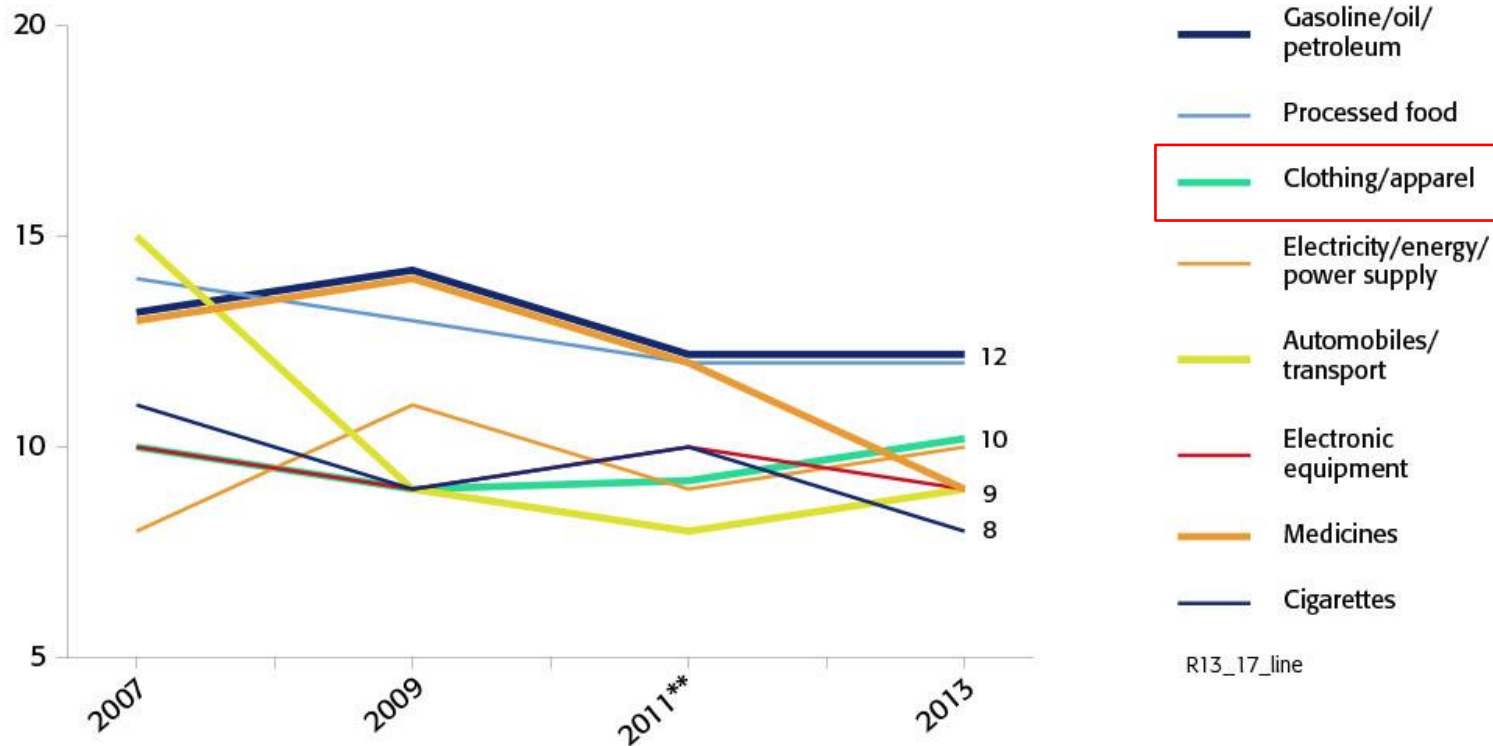


\*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

# Increase in number of people wishing to see more socially responsible clothing products

## 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

17t. What specific types of products or services that you buy would you most like to see become more socially and environmentally responsible? Anything else?

# Global Societal Context to Inform Decisions & Strategy

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