

CSR Performance Electricity Industry | 2013

IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.



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evidence and ideas. applied

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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.

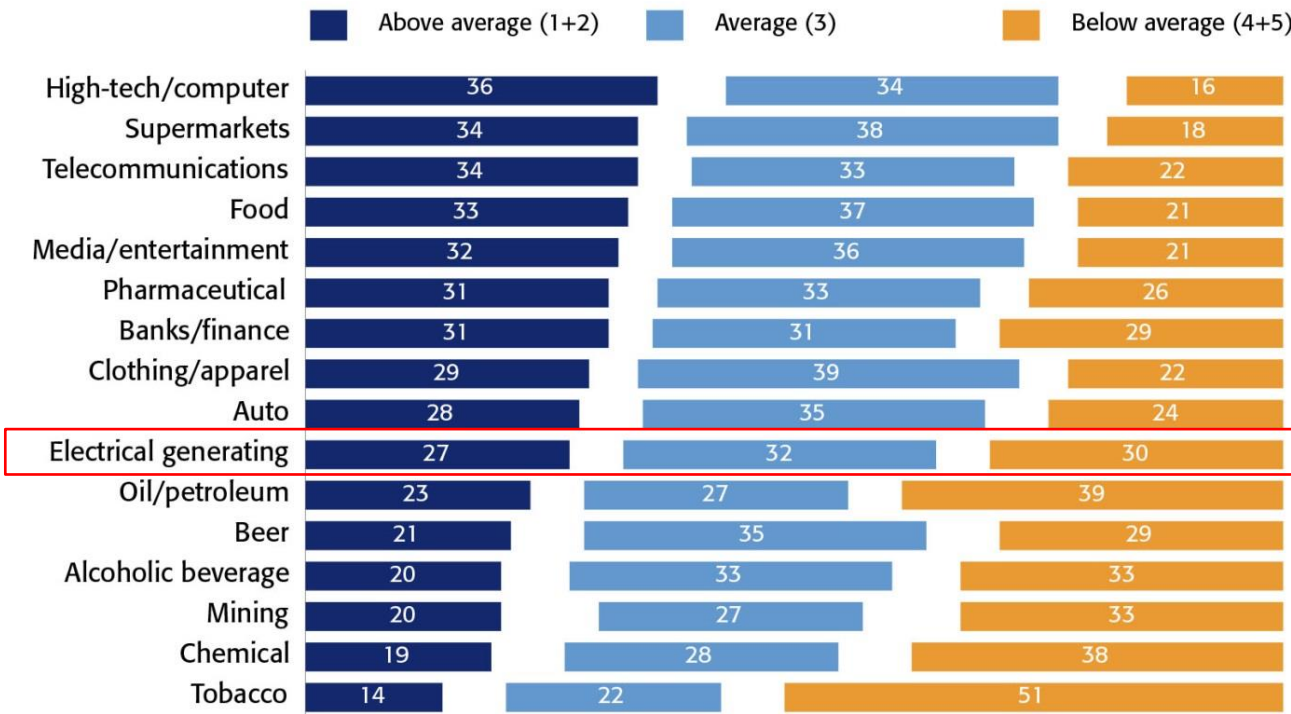
Key findings

- The electricity industry's CSR performance is middle ranked compared to others. Views have stabilised in 2013, in contrast to previous years, when impressions became worse.
- In South Korea the electricity industry is the second highest rated in terms of its CSR performance. In general however, the industry is poorly ranked in many countries.
- Indonesia is the country with the best perception of the electricity industry's CSR efforts, and Argentina the country with the most negative stance.
- Whilst countries such as Germany and the US have seen strong rises in favourable impressions of the electricity industry, many others, such as the UK and France have seen pronounced falls.
- Rising numbers of people, unprompted, say they would like to see more socially responsible energy available.

Electricity industry's CSR performance seen as middling

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013



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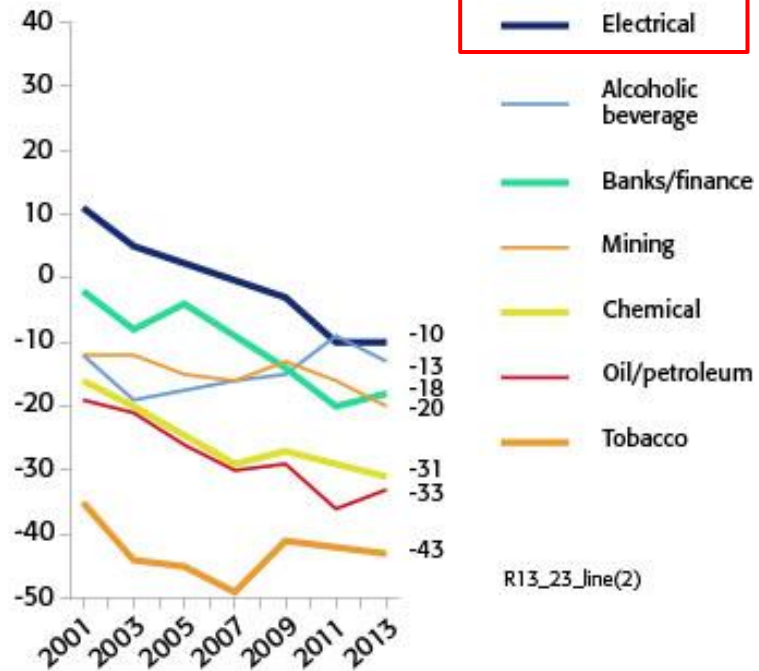
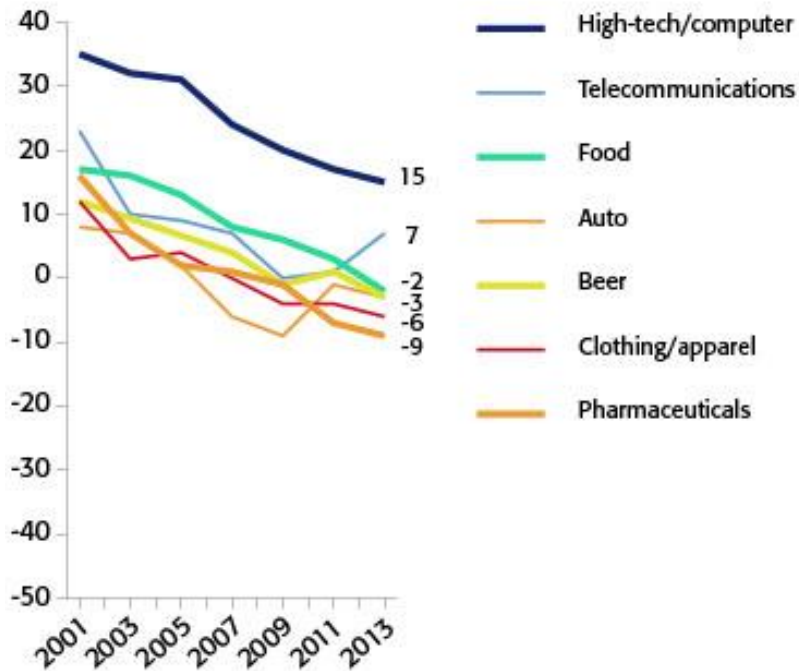
The white space in this chart represents "Depends," "No opinion," and "DK/NA."

*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 on the industry stabilise after long decline

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.

Electricity industry often see as among the less responsible industries

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

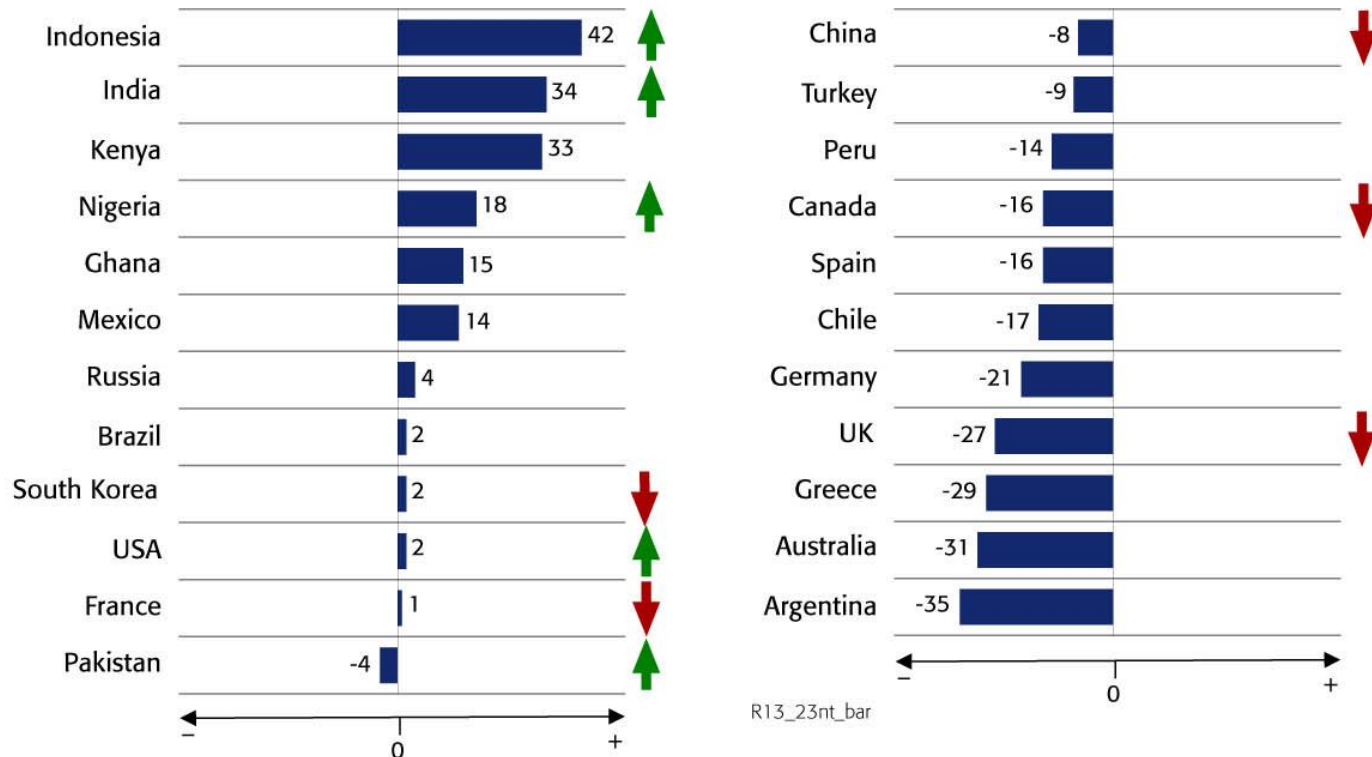
*Net equals "Among the best" and "Above average" minus "Below average" and "Among the worst." Highlighting refers to a change of 6% or more since 2011.

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 have best impression of electricity industry's CSR efforts

CSR Performance of the Electrical Generating Industry

Net Ratings,* by Country, 2013



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

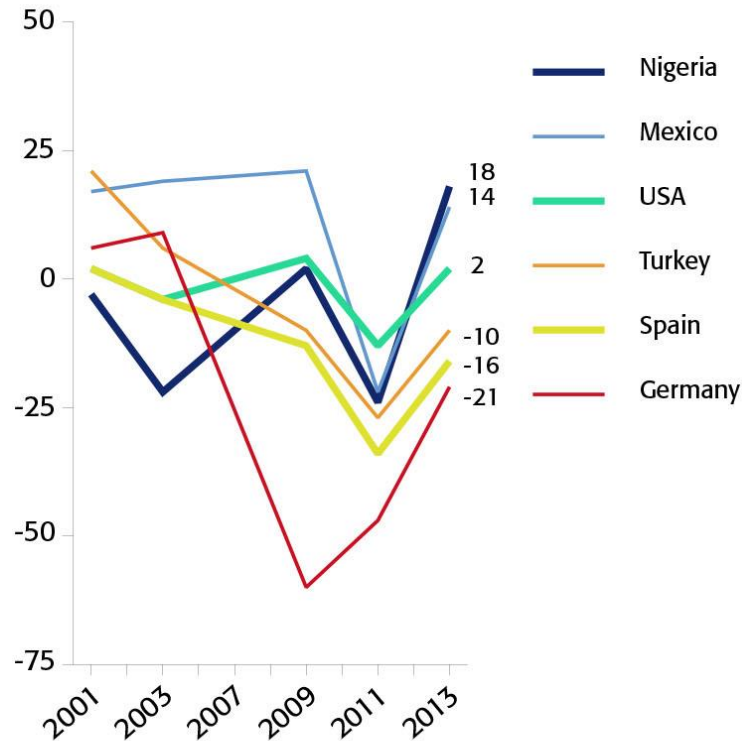
Green arrows indicate an increase of 6% or more in "Among the very best" and "Above average" ratings compared to 2011, while red arrows indicate a decrease of 6% or more.

Sharp fall in CSR perceptions in China

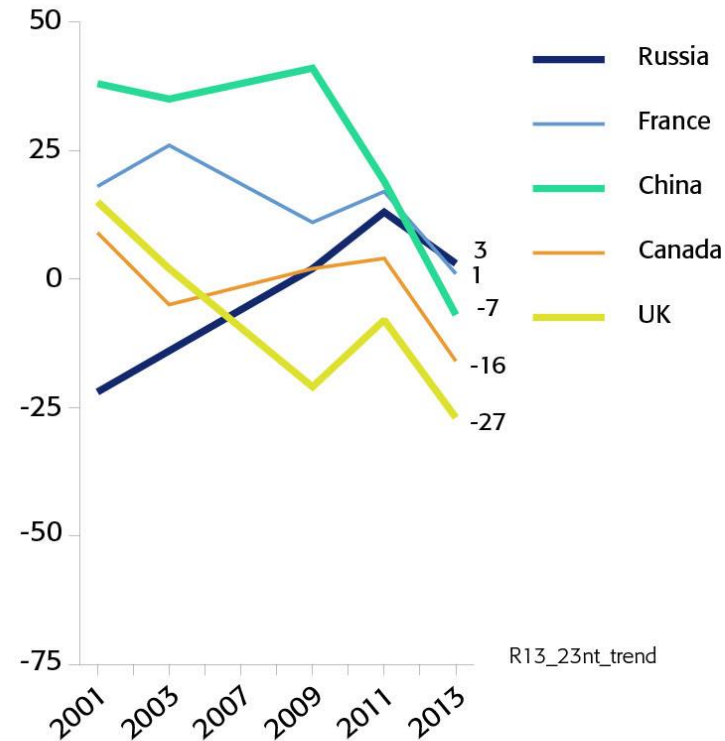
CSR Performance of Electrical Generating Companies

Net Ratings,* Trends: 2001–2013

Increases and stable



Decreases



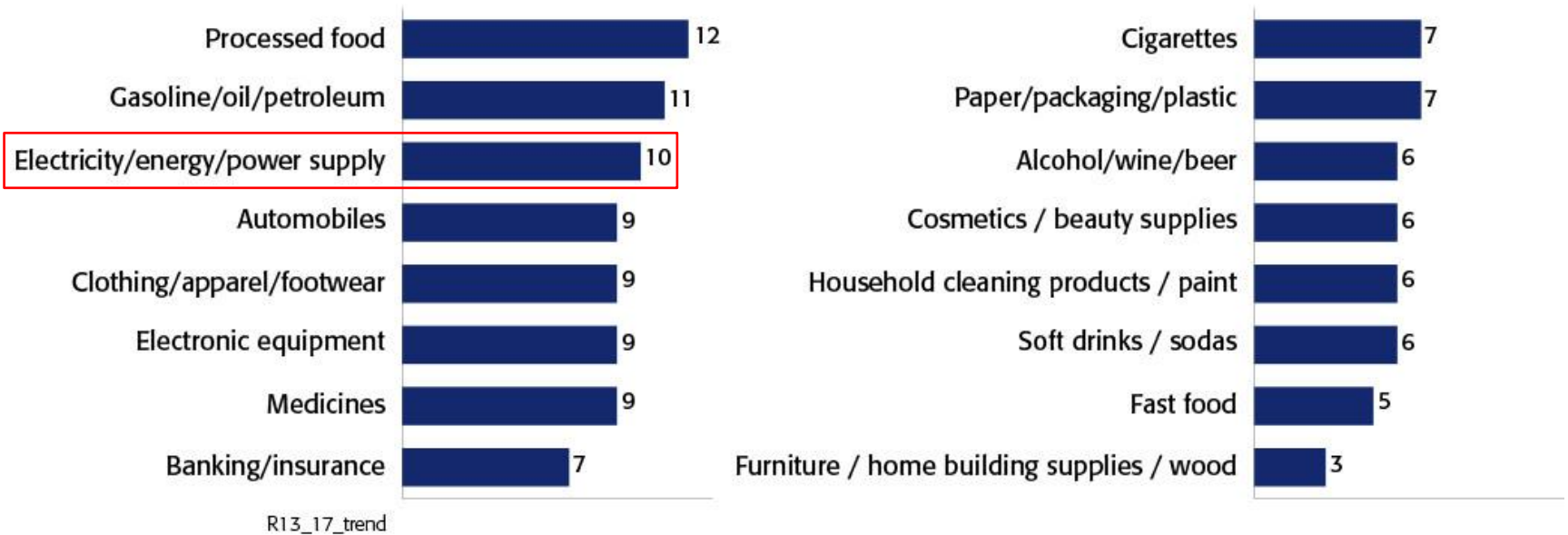
*Net ratings represent "Among the very best" and "Above average" minus "Below average" and "Among the very worst."

Q23btnPlease 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 - . Electrical generating companies are?

Ten per cent want to see more socially responsible energy

CSR Product Offerings Most Wanted

Unprompted, Average of 18 Countries,* 2013

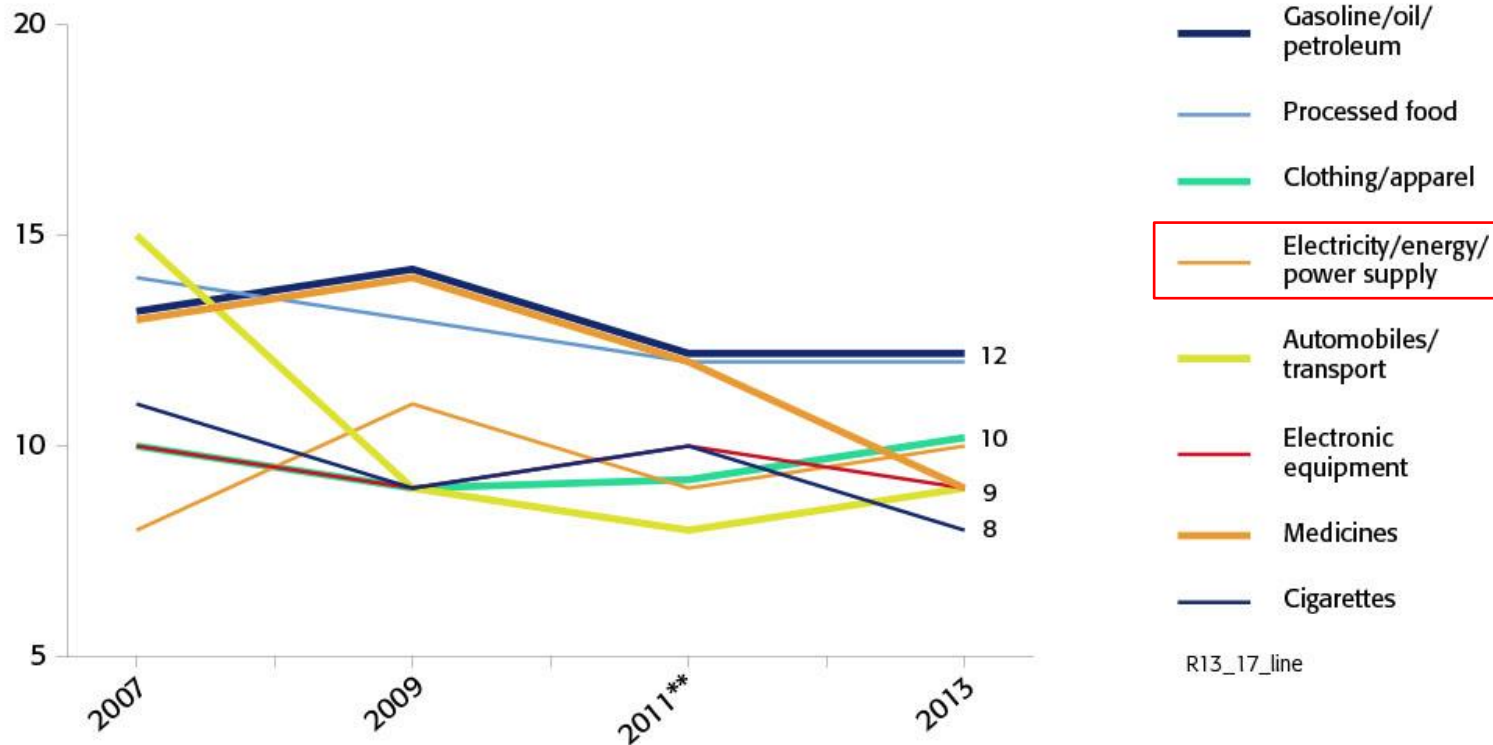


*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

Rising numbers want to see more socially and environmental responsible energy

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

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:

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