

CSR Reputation Media and Entertainment Industry | 2013



IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.



GlobeScan Radar

GLOBESCAN

evidence and ideas. applied

For more information, please contact:

Shannon Stevenson

External Relations Manager

shannon.stevenson@globescan.com

© October 2013

Project: 2713, GlobeScan®

The 2013 GlobeScan Radar Survey is confidential and is provided for the sole benefit and use of subscribers. Clients have agreed to respect and maintain the confidential nature of the report and will not release its contents to any third party, to the public, or to the media. Nor will this report be reproduced in whole or in part, without the express written consent of:

GlobeScan Incorporated
65 St. Clair Avenue East, Suite 900
Toronto, Canada M4T 2Y3

tel: +1 416.962.0707

fax: +1 416.920.3510



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.

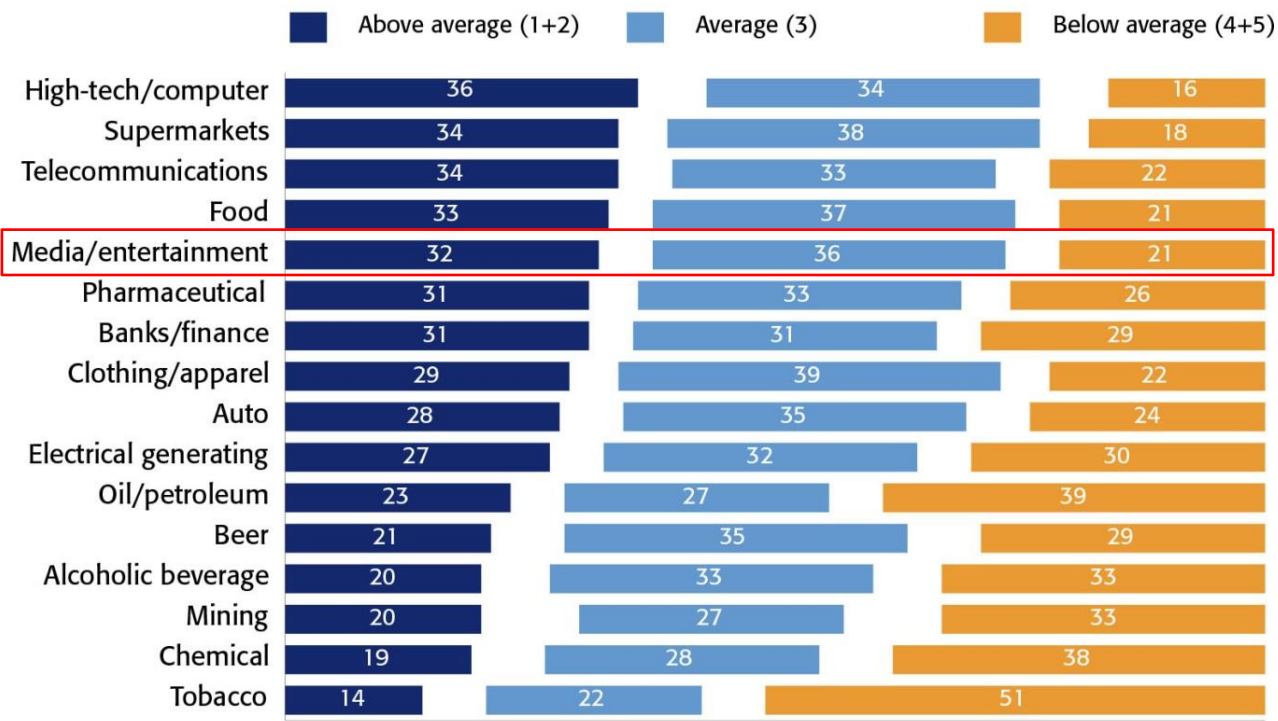
Key findings

- The media and entertainment industry's CSR performance is viewed relatively positively by the global public compared to other industries. Only one in five people have a negative perception of the industry.
- The media and entertainment industry is the top ranked industry in terms of its CSR reputation in Nigeria, and is highly ranked (2nd) in Brazil, France, India, and Kenya. However, it is ranked very low compared to other industries in the US, as well as in Greece and Turkey.
- Net negative and among the lowest of the countries surveyed, American perceptions of the media and entertainment industry's CSR performance have declined further since 2011.
- Views of the industry have also dipped in Brazil, China, Greece, Peru, South Korea, and the UK.
- However, other countries, such as Mexico, India, Pakistan, and Turkey (among others), have seen improvements in perceptions of the media and entertainment industry.

Media and entertainment industry's CSR performance is viewed relatively positively

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013



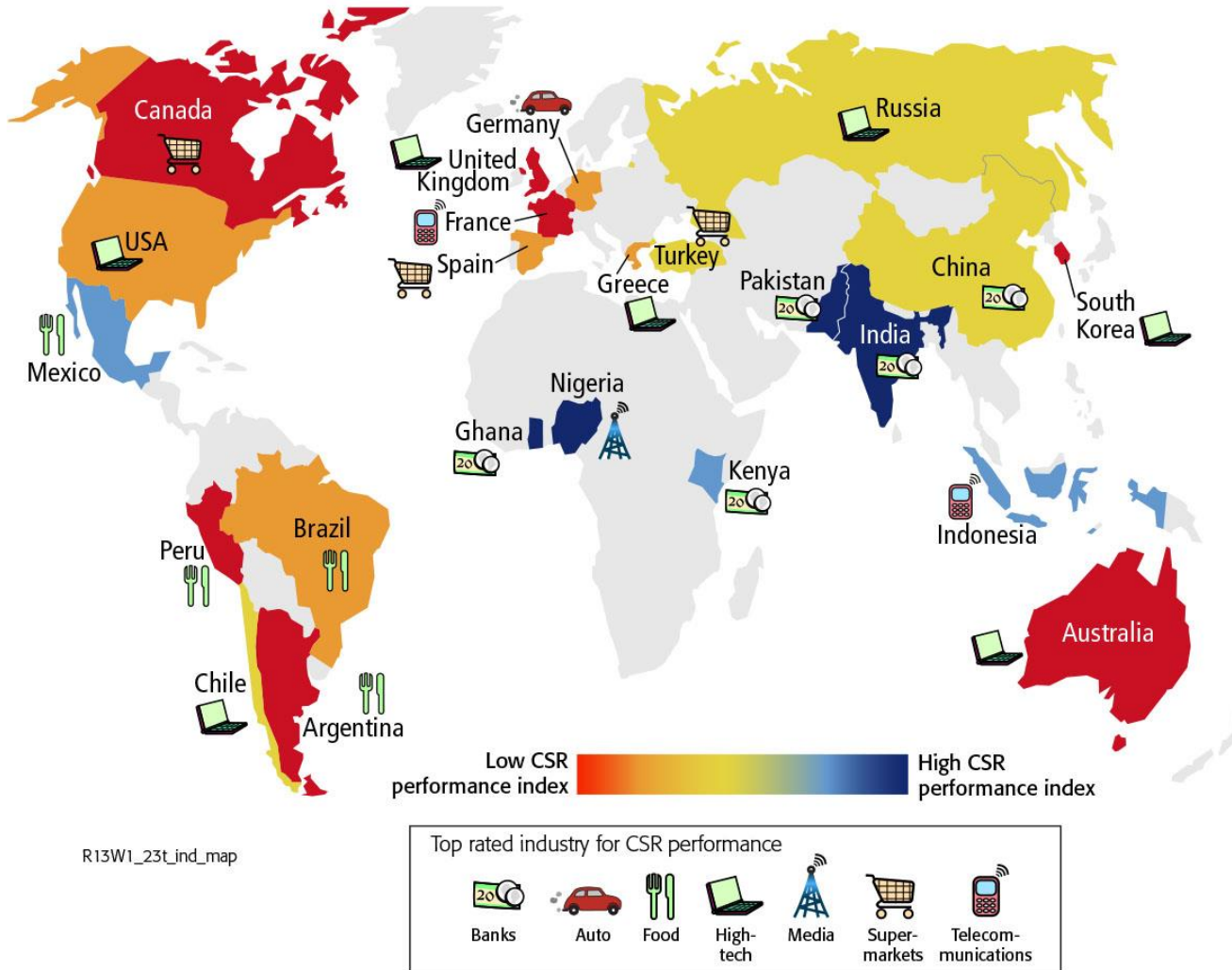
R13_23_likert

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

Industry is viewed as top CSR performer in Nigeria

CSR Performance and Highest Rated Industry
By country, 2013



R13W1_23t_ind_map

Media/entertainment industry seen as among the most responsible industries in some developing markets and France, among least responsible in USA



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

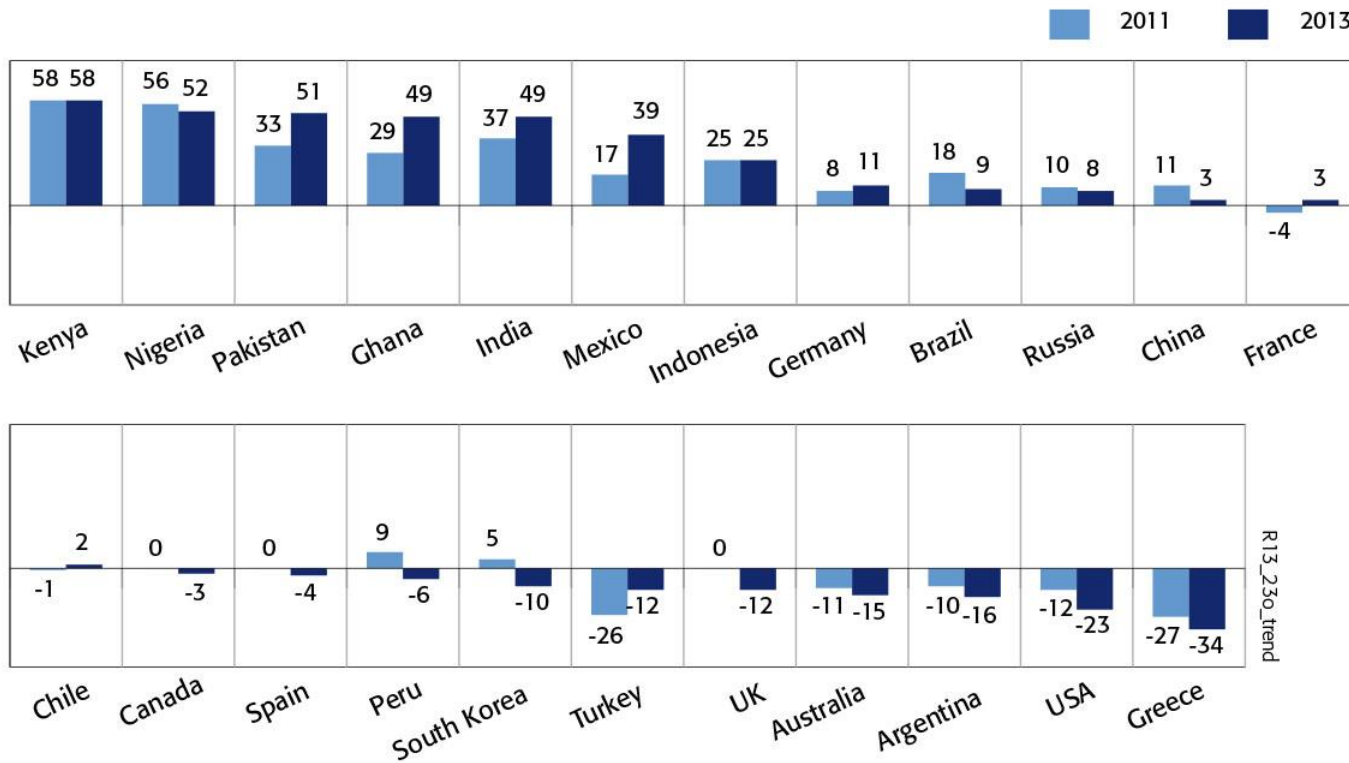
■ Increase in "Among the very best" and "Above average" ratings compared to 2011
 ■ Decrease in "Among the very best" and "Above average" ratings compared to 2011
 ■ Tracking data not available

*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?

Negative and declining perceptions of media/entertainment industry's CSR record in USA

CSR Performance of the Media and Entertainment Industry

Net Ratings*, Selected Countries, 2011–2013



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

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



evidence and ideas. **applied**

For twenty-five years, GlobeScan has helped clients measure and build value-generating relationships with their stakeholders, and to work collaboratively in delivering a sustainable and equitable future.

Uniquely placed at the nexus of reputation, brand and sustainability, GlobeScan partners with clients to build trust, drive engagement and inspire innovation within, around and beyond their organizations.

www.GlobeScan.com