

CSR Reputation Oil and Petroleum Industry | 2013



IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.



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

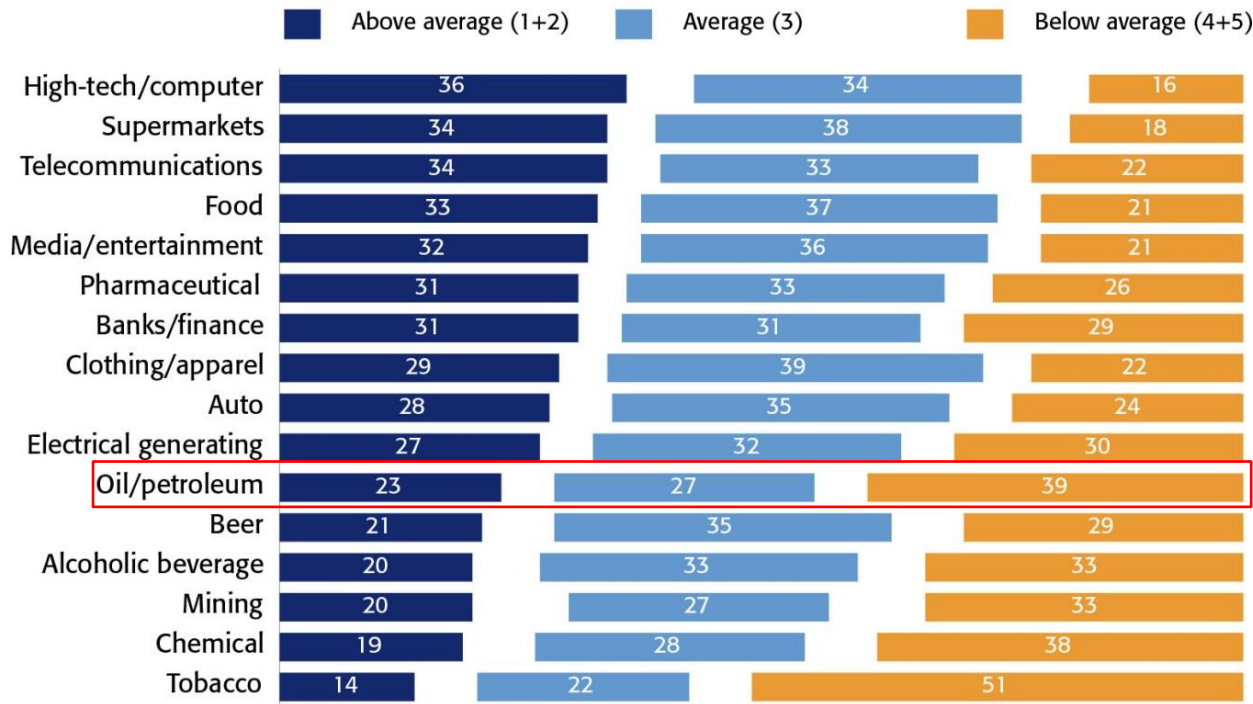
- Since 2011 the oil/petroleum industry's perceived CSR performance has ticked up slightly, in contrast with many other sectors. However, the global public continues to view the industry as one of the poorest CSR performers.
- In no country is the oil/petroleum industry seen as the top ranked CSR performer compared to other industries; its highest position being fourth in Brazil where Petrobras is traditionally viewed as a top responsible company.
- India is the country with the highest net perception of the industry's CSR performance, with many developing nations taking a more favorable view. In contrast, developed nations are much more likely to give the industry a poor CSR review.
- Though on the wane in major oil producing nations such as Nigeria, Russia and the UK, there has been a slight increase in the number of Americans who rate the industry's CSR performance well.
 - In the US, BP is one of the three best perceived companies in terms of responsibility, highlighting the recovery of the industry's reputation in the wake of the 2010 disaster in the Gulf of Mexico (although BP also remains the top irresponsible company according to Americans, and perceptions of the industry remain overwhelmingly negative).
- Oil and gas products remain among those that the public most want to see become more responsible, suggesting consumers are receptive to efforts by the industry to move toward sustainability.
 - GlobeScan's earlier research has shown that consumers would most like the industry to address its environmental impacts, and to explore alternatives to fossil fuels. The heavy environmental footprint of the oil/petroleum industry continues to be a major public concern that threatens its social license to operate. Affordability is another key issue that affects public perceptions of the industry.

Oil/petroleum industry's perceived CSR performance is mostly negative



CSR Performance of Industry Sectors

Average of 23 Countries,* 2013



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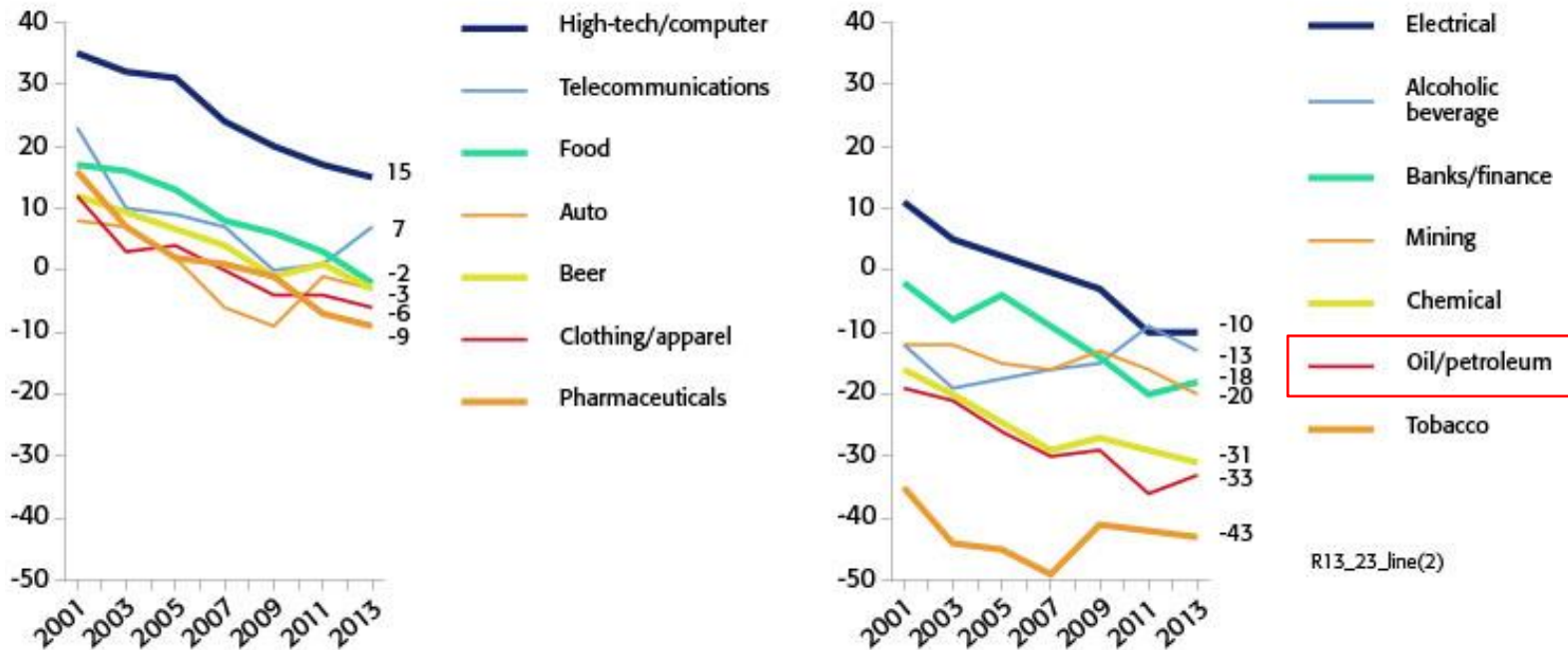
The white space in this chart represents "Depends," "No opinion," and "DK/NA."

*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

Globally, tracking of oil/petroleum industry's perceived CSR performance sees an uptick in 2013

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.

Oil/petroleum industry almost universally seen as among the poorest CSR performers



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

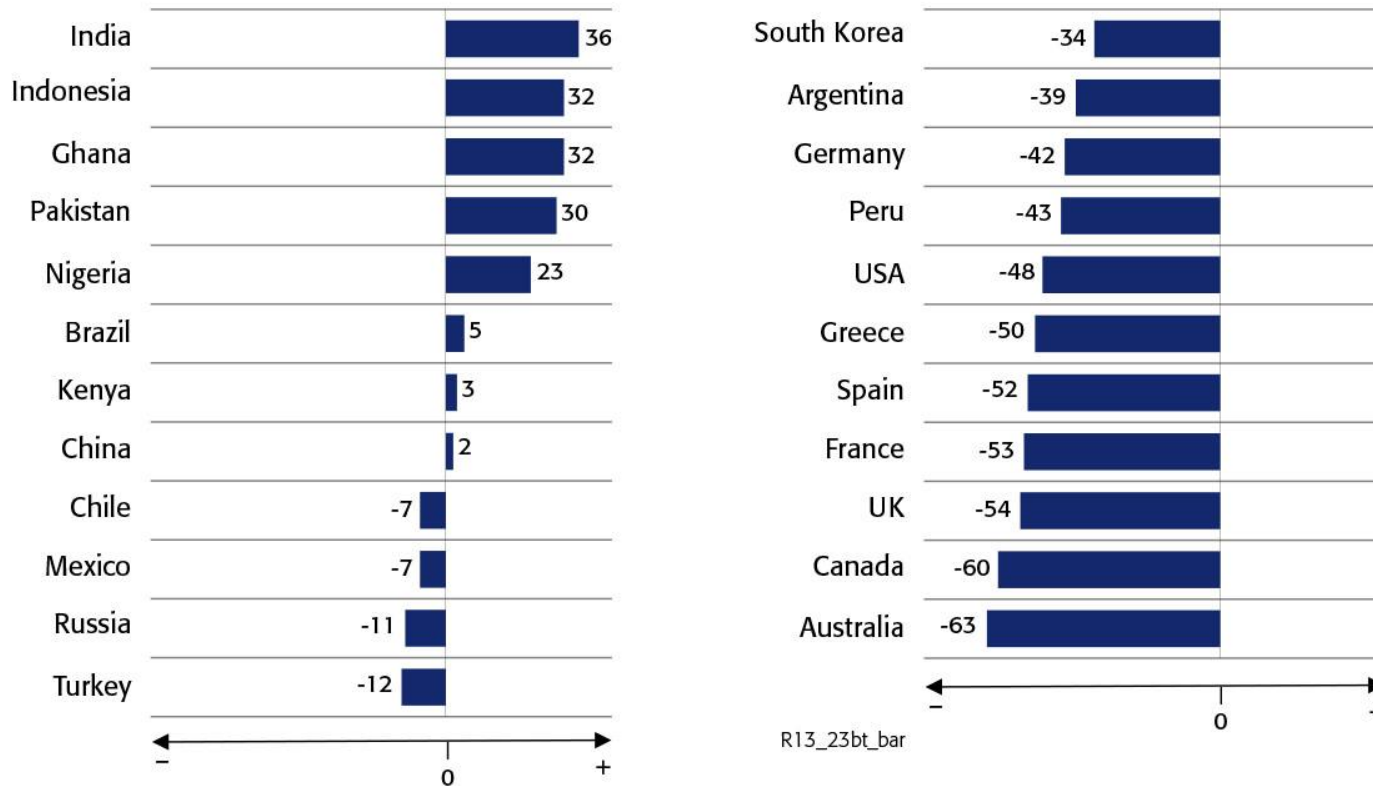
■ Decrease in "Among the very best" and "Above average" ratings compared to 2011

■ Tracking data not available

Developed nations rate oil/petroleum industry's CSR performance much lower than do developing nations

CSR Performance of the Oil Industry

Net Ratings, * by Country, 2013



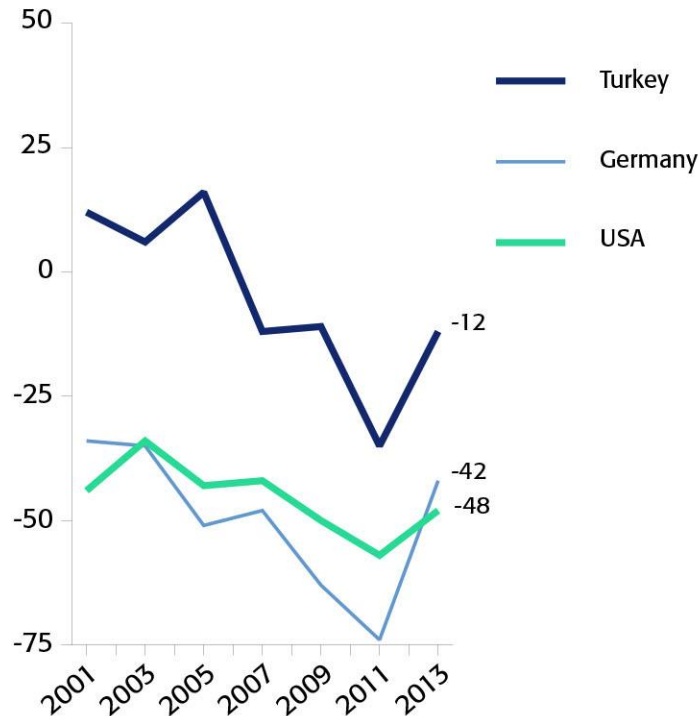
*Net ratings equal "Among the best" and "Above average" minus "Below average" and "Among the worst."

American perceptions of the oil/petroleum industry are on the rise, UK perceptions continue to decline

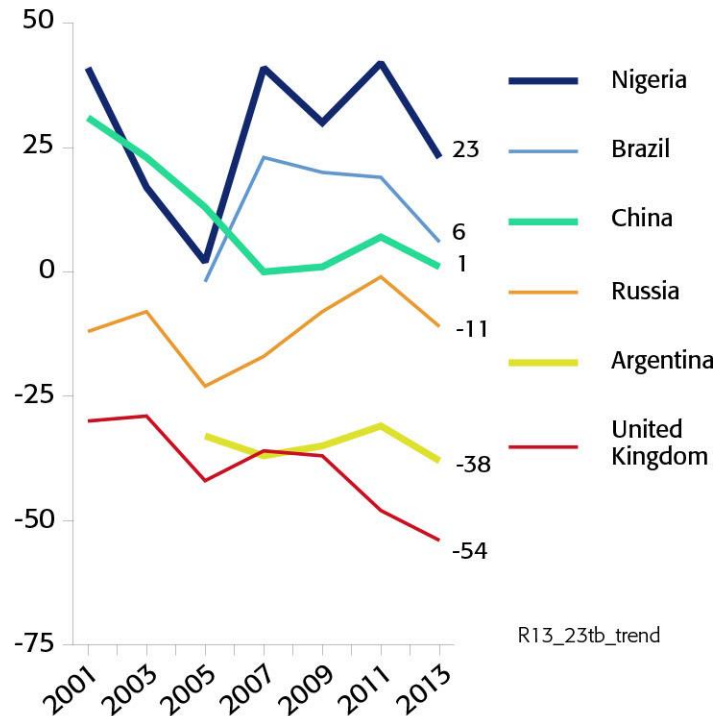
CSR Performance of Oil/Petroleum Companies

Net Ratings,* Trends: 2001–2013

Increases and stable



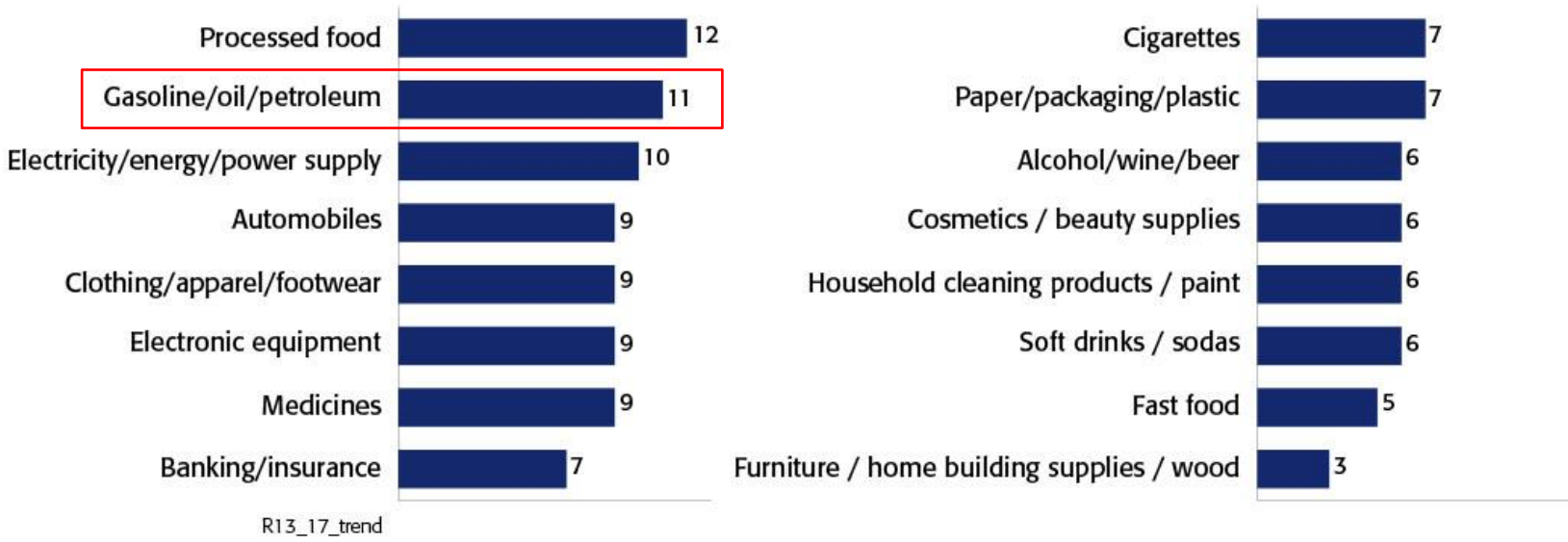
Decreases



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

Oil industry among most-often cited by consumers as one they want to see become more responsible

CSR Product Offerings Most Wanted
Unprompted, Average of 18 Countries,* 2013

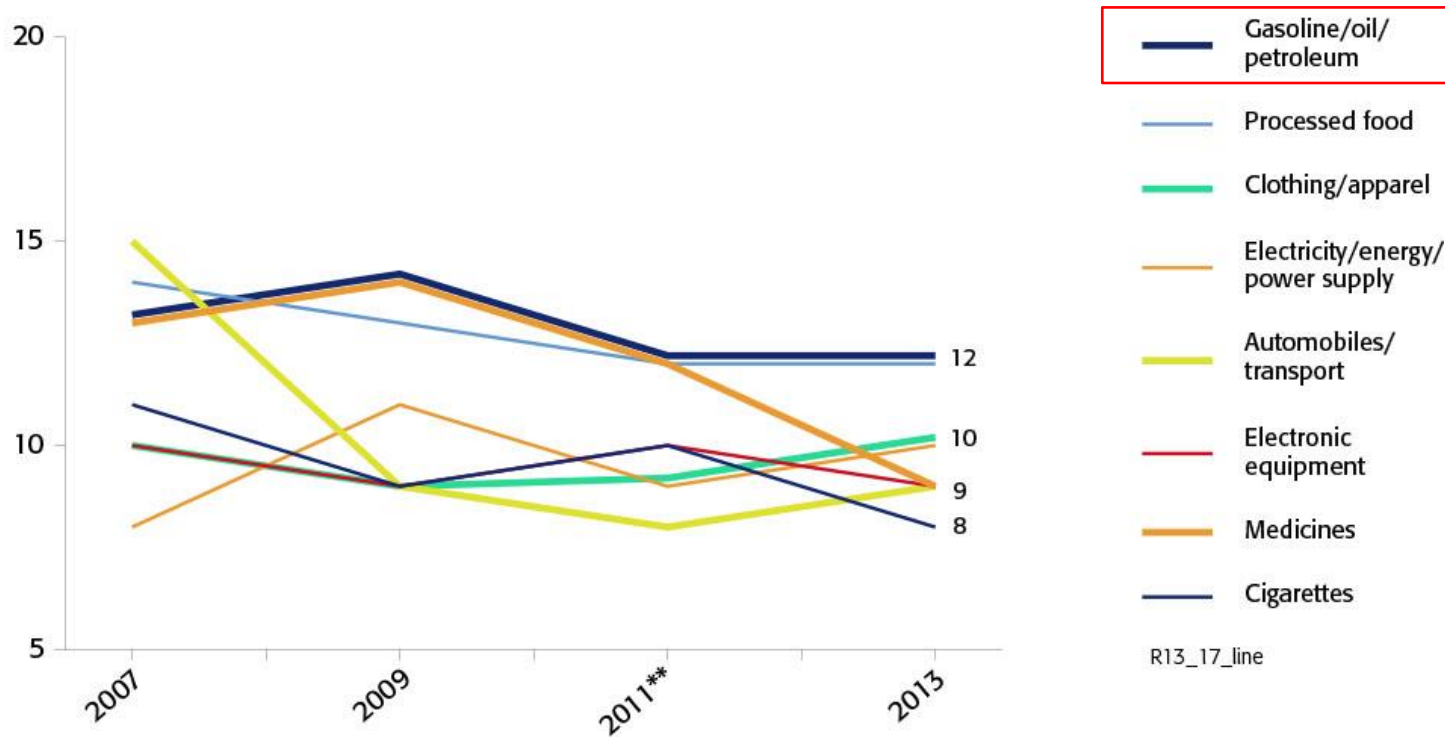


*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

Medicines, oil/petroleum, decouple in taking greater responsibility stakes

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.



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