CSR Performance Telecommunications Industry | 2013

IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.

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For more information, please contact:

Shannon Stevenson
External Relations Manager
shannon.stevenson@globescan.com

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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 telecommunications industry is one of the most favourably rated on its CSR performance. It is also one of the few whose perceived performance has risen over the past year.

- In France and Indonesia, the industry is seen as the strongest performer on CSR. In general however, perceptions on the telecommunications industry's responsibility vary strongly between countries.

- Argentina is the country that has the most negative view of the industry's CSR efforts, with Indonesia and Kenya being most positive.

- Unprompted, nine per cent of respondents said they wanted to see more socially responsible electronic products available. This is down on the 2011 figure.

Telecommunications industry seen as one of the top CSR performers

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013

Industry Sector	Above average (1+2)	Average (3)	Below average (4+5)
High-tech/computer	36	34	16
Supermarkets	34	38	18
Telecommunications	34	33	22
Food	33	37	21
Media/entertainment	32	36	21
Pharmaceutical	31	33	26
Banks/finance	31	31	29
Clothing/apparel	29	39	22
Auto	28	35	24
Electrical generating	27	32	30
Oil/petroleum	23	27	39
Beer	21	35	29
Alcoholic beverage	20	33	33
Mining	20	27	33
Chemical	19	28	38
Tobacco	14	22	51

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

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? -

Telecommunications industry's CSR perception shows slight fall since 2011

CSR Performance of Industry Sectors
Net,* Average of 11 Countries,** 2001–2013

Left chart legend: High-tech/computer, Telecommunications, Food, Auto, Beer, Clothing/apparel, Pharmaceuticals

Left chart end labels: 15, 7, -2, -3, -6, -9

Right chart legend: Electrical, Alcoholic beverage, Banks/finance, Mining, Chemical, Oil/petroleum, Tobacco

Right chart end labels: -10, -13, -18, -20, -31, -33, -43

R13_23_line(2)
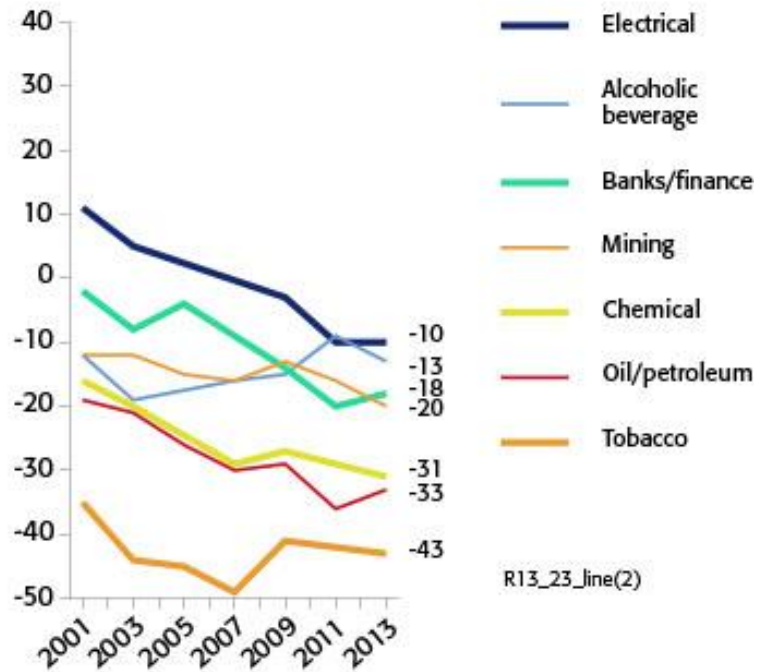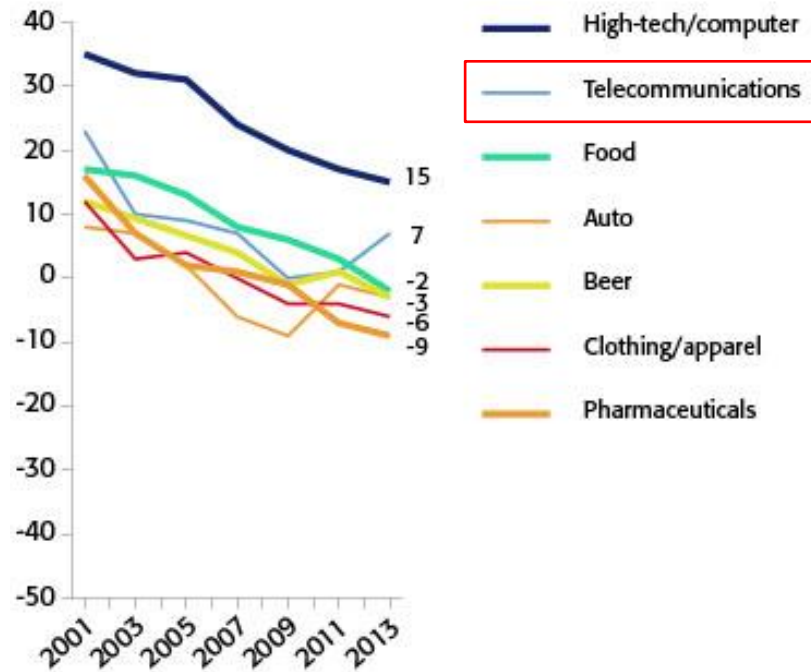
*"Among the best" and "Above average" minus "Below average" and "Among the worst"

**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.

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?

Telecommunications industry's CSR performance positively ranked in many countries

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	11	10	12	11	13	15	8	13	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

Legend:
- 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.
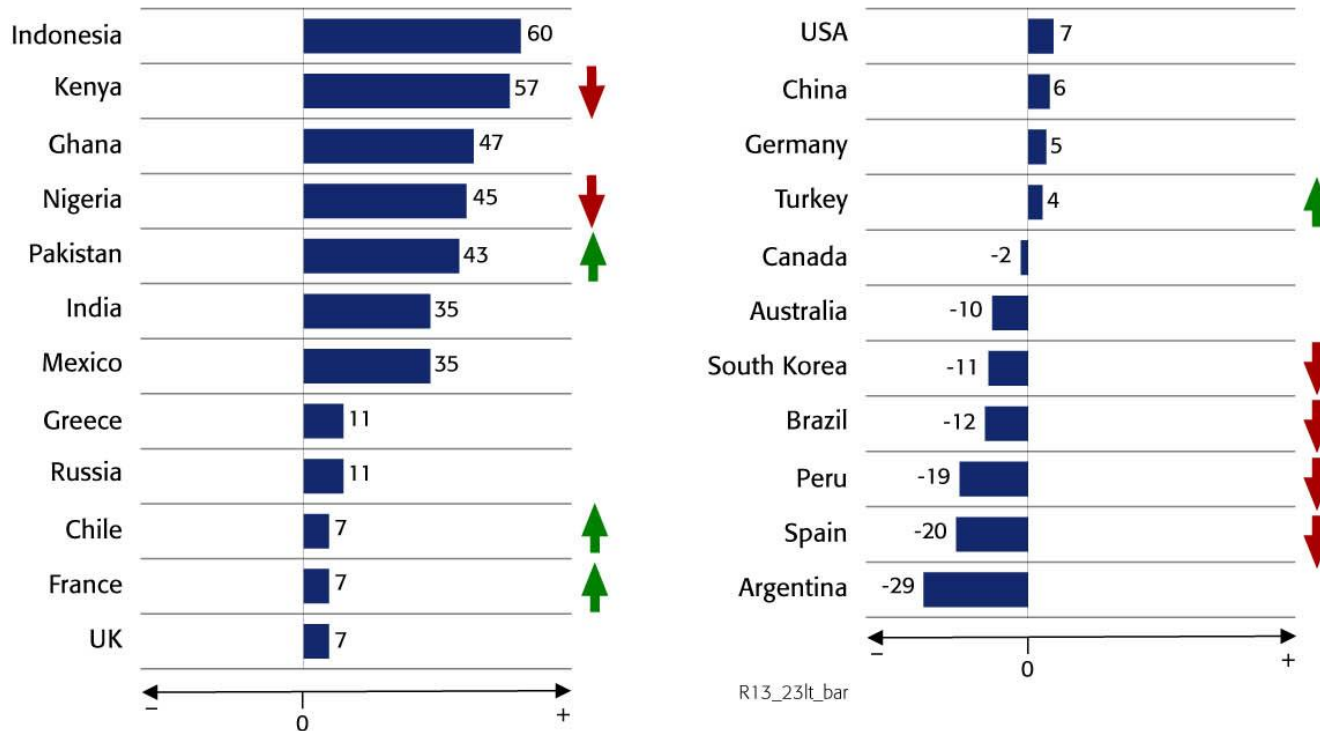
Q23. Please rate each of the following types of companies on how well they fulfill their responsibilities to society. Compared to other types of companies, would you say [INSERT COMPANY TYPE] are?

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CSR Performance of the Telecommunications Industry

Net Ratings,* by Country, 2013

Country	Net Rating
Indonesia	60
Kenya	57 ↓
Ghana	47
Nigeria	45 ↓
Pakistan	43 ↑
India	35
Mexico	35
Greece	11
Russia	11
Chile	7 ↑
France	7 ↑
UK	7

Country	Net Rating
USA	7
China	6
Germany	5
Turkey	4 ↑
Canada	-2
Australia	-10
South Korea	-11 ↓
Brazil	-12 ↓
Peru	-19 ↓
Spain	-20 ↓
Argentina	-29

R13_23lt_bar

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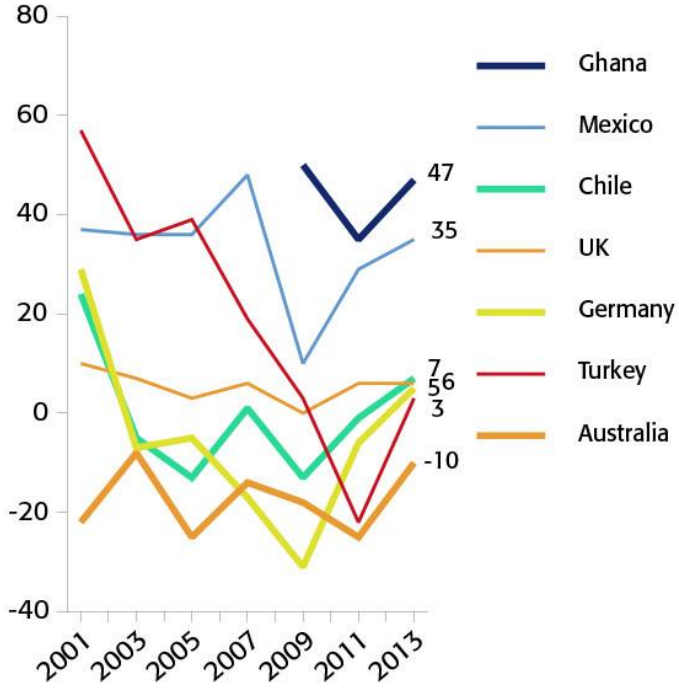Green arrows indicate an increase of 6% or more in "Among the very best" and "Above average" ratings compared to 2011, while red arrows indicate a decrease of 6% or more.

8 Q23btl. 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 - Telecommunications companies (telephone) companies are?

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After years of steep decline, CSR performance seen to be improving in Turkey

CSR Performance of Telecommunications Companies
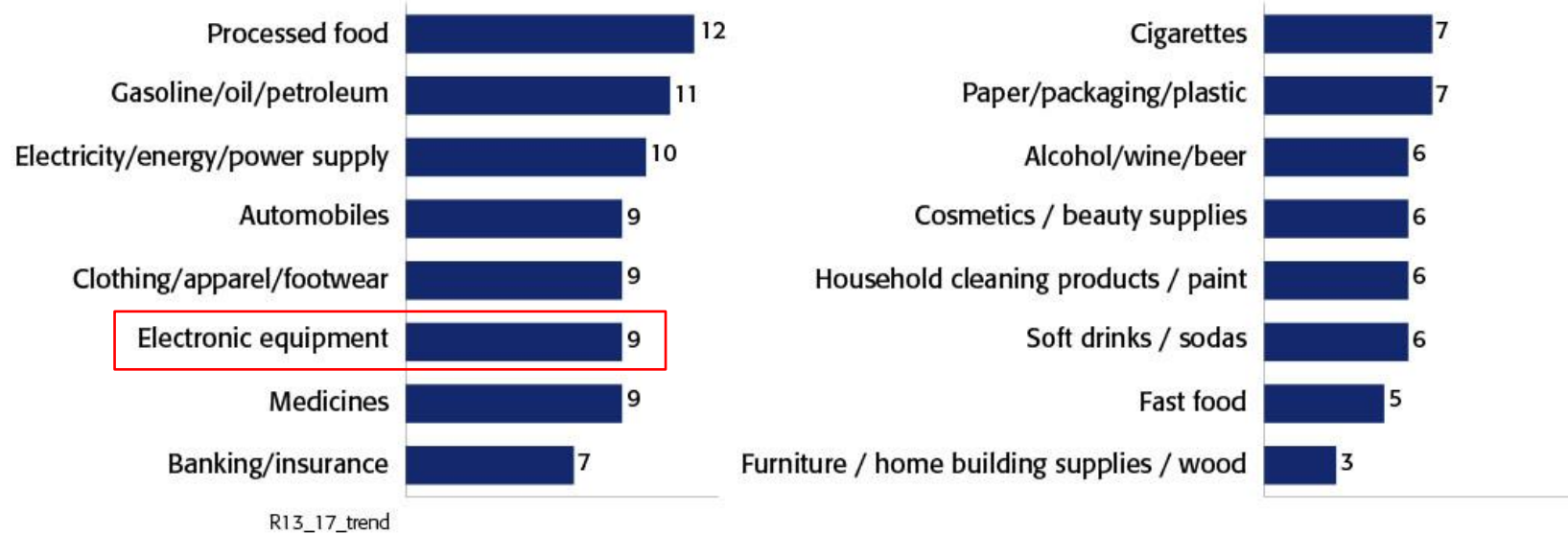Net Ratings,* Trends: 2001–2013

Increases and stable

Ghana — 47
Mexico — 35
Chile — 7
UK — 56
Germany — 3
Turkey
Australia — -10

Decreases

Kenya — 56
China — 6
Peru — -19
Argentina** — -29

R13_23lt_trend
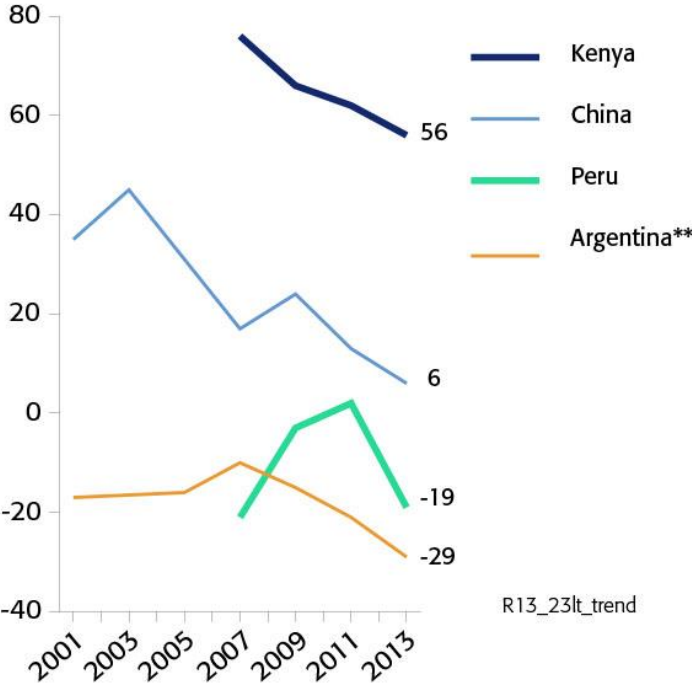
*Net ratings represent "Among the very best" and "Above average" minus "Below average" and "Among the very worst."
**Not asked in 2003

Q23btl. 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 - Telecommunications companies (telephone) companies are?

Nine per cent want to see more socially responsible electronic equipment

CSR Product Offerings Most Wanted

Unprompted, Average of 18 Countries,* 2013

Product	Value
Processed food	12
Gasoline/oil/petroleum	11
Electricity/energy/power supply	10
Automobiles	9
Clothing/apparel/footwear	9
Electronic equipment	9
Medicines	9
Banking/insurance	7

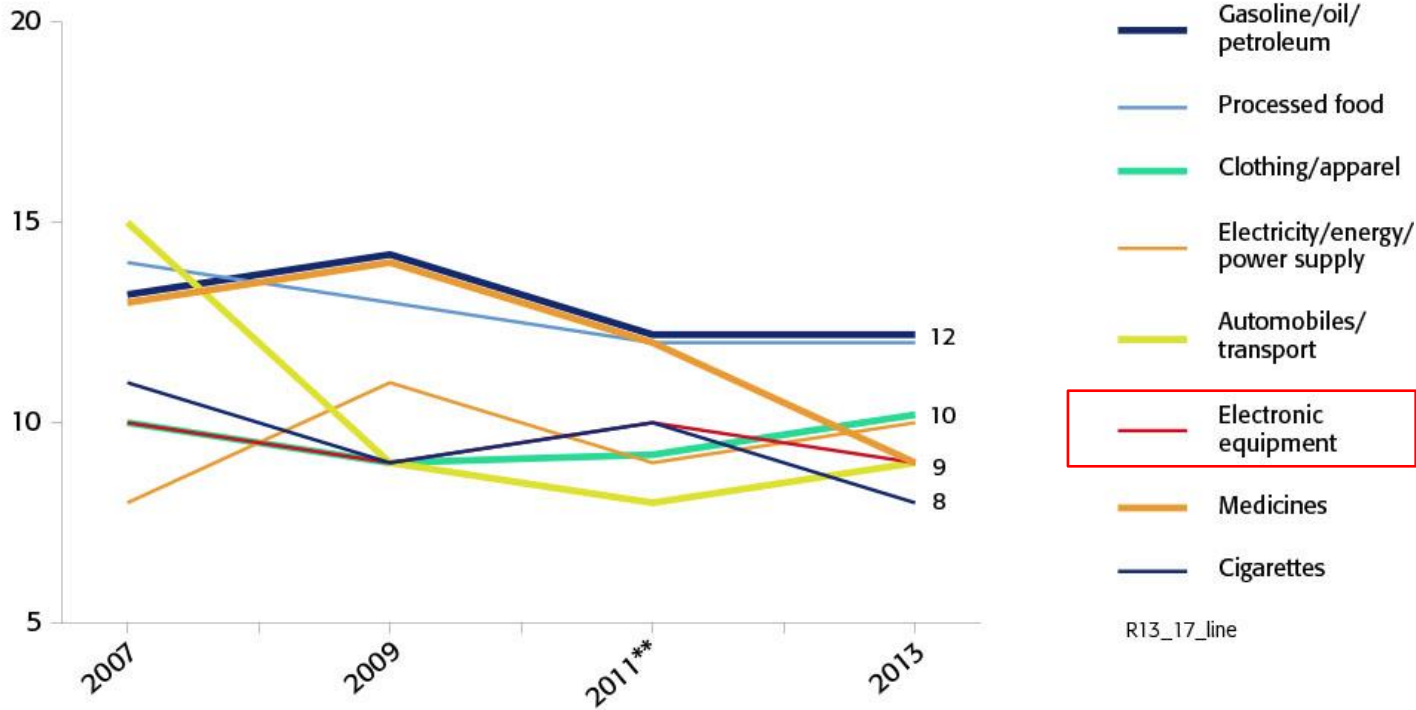| Product	Value
Cigarettes	7
Paper/packaging/plastic	7
Alcohol/wine/beer	6
Cosmetics / beauty supplies	6
Household cleaning products / paint	6
Soft drinks / sodas	6
Fast food	5
Furniture / home building supplies / wood	3

R13_17_trend

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

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?

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Numbers who want to see more responsible electronic products down on 2011

CSR Product Offerings Most Wanted

Unprompted, Average of 13 Countries,* 2007–2013

Legend:
- Gasoline/oil/petroleum
- Processed food
- Clothing/apparel
- Electricity/energy/power supply
- Automobiles/transport
- Electronic equipment
- Medicines
- Cigarettes

R13_17_line

Values at 2013: 12, 10, 9, 8

*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?

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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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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.

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