Saint, Sinner or Changemaker?

Mapping NGO Sentiment to Inform Stakeholder Engagement and Track Corporate Reputation

27 July 2017

Agenda

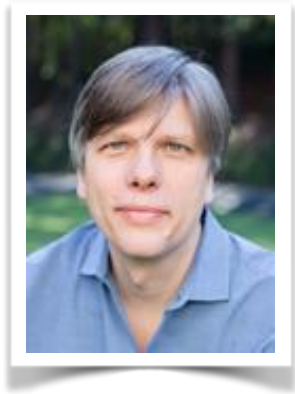☑ Introductions

☑ Panelist Presentations

☑ Q&A

Introractions

Chris Coulter
CEO
GlobeScan

Robert Blood
Founder and Managing Director
SIGWATCH

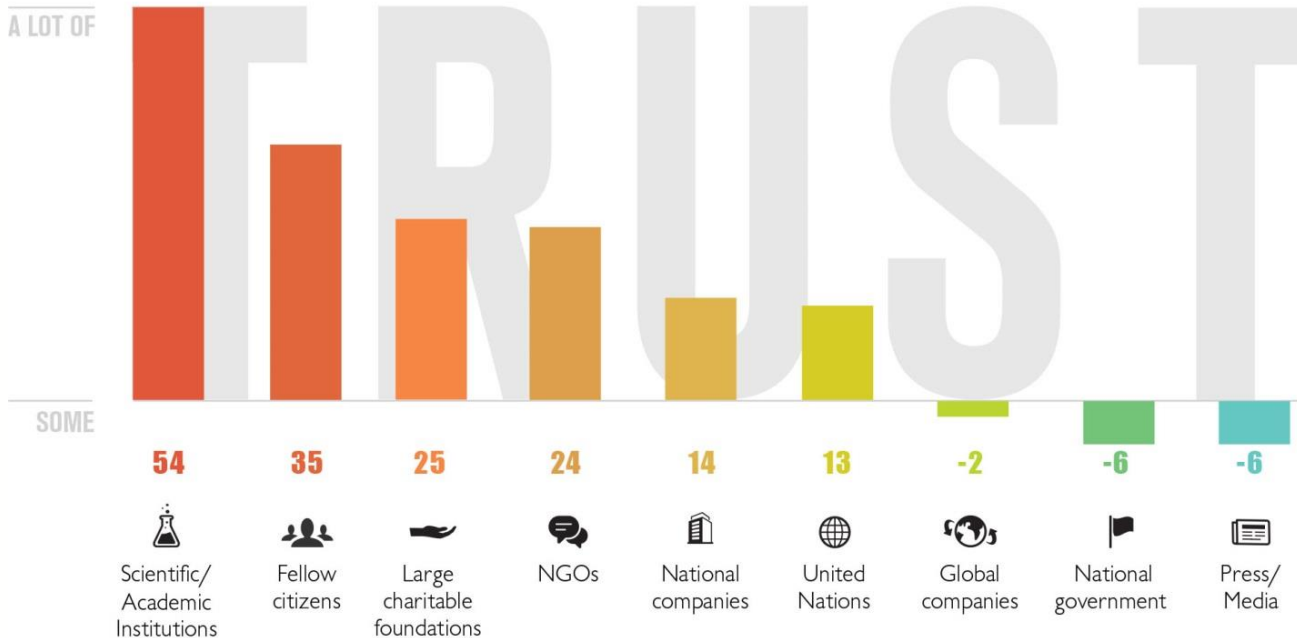Lee Anderson
Director of State and Local Government Relations
General Mills

General Public:
NGOs Are Highly
Trusted

GLOBESCAN
evidence and ideas. applied

Science and academic institutions are the most trusted by the global public, followed by fellow citizens, Foundations and NGOs

Net Trust* in Institutions
Average of 20 Countries,** 2017

A LOT OF

SOME

Institution	Net Trust
Scientific/ Academic Institutions	54
Fellow citizens	35
Large charitable foundations	25
NGOs	24
National companies	14
United Nations	13
Global companies	-2
National government	-6
Press/ Media	-6

*"A lot of trust" and "Some trust" minus "Not much trust" a "No trust at all"
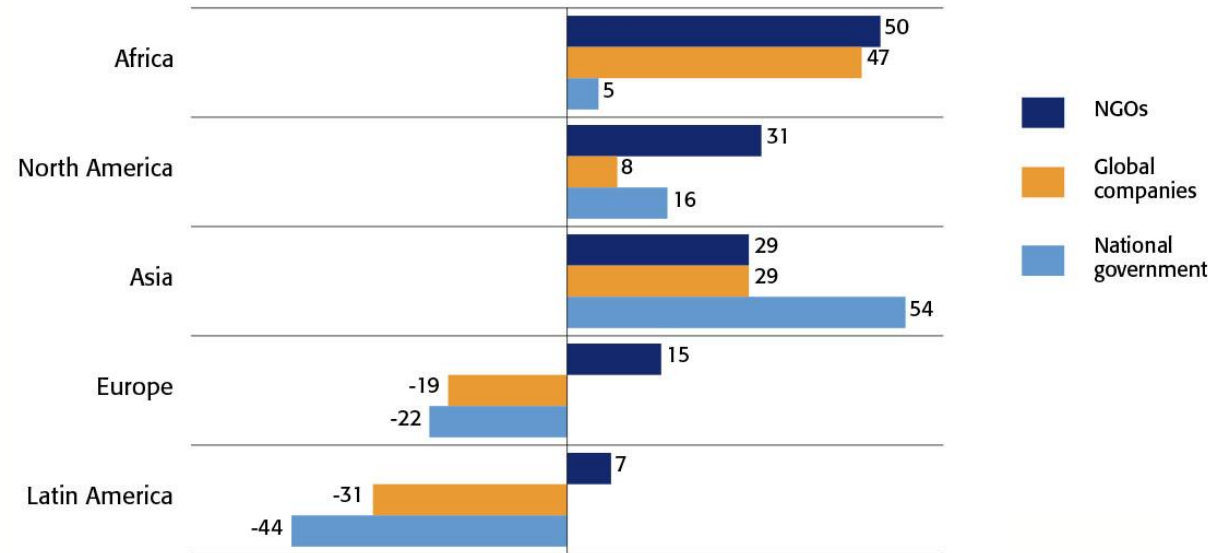
**Includes Australia, Brazil, Canada, Chile, France, Germany, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Africa, Spain, Turkey, UK, and USA

Q. Please tell me how much you trust each of the following institutions to operate in the best interest of our society.

NGOs are universally trusted institutions, earning positive levels of trust from respondents across regions

Trust in NGOs, National Government, and Global Companies
Net Trust,* by Region,** 2017

Legend:
- NGOs
- Global companies
- National government

Region	NGOs	Global companies	National government
Africa	50	47	5
North America	31	8	16
Asia	29	29	54
Europe	15	-19	-22
Latin America	7	-31	-44

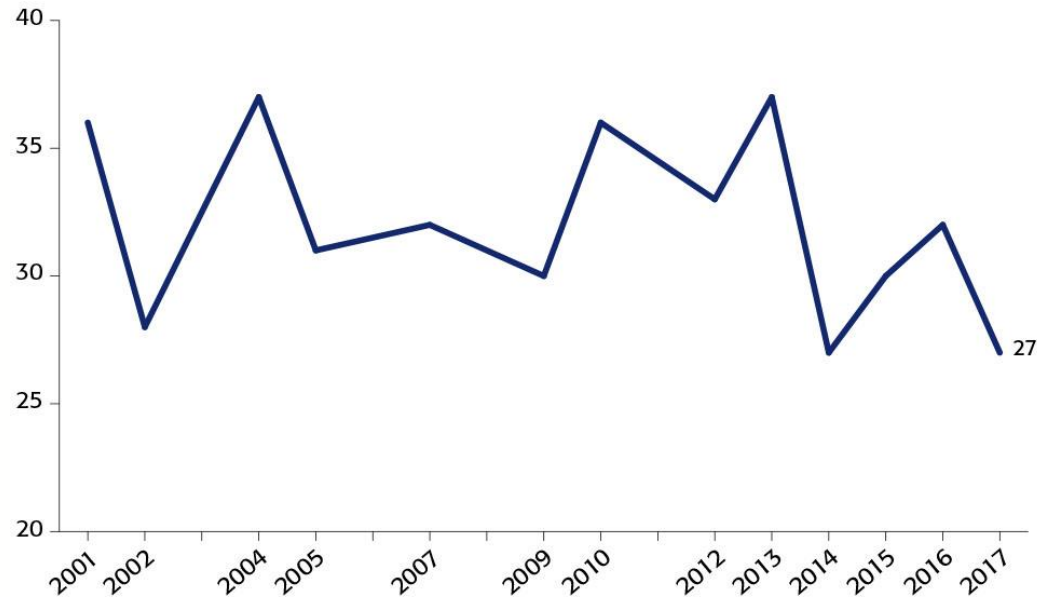*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

**Includes Brazil, Canada, Chile, China, France, Germany, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Africa, Spain, Turkey, UK, and USA

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Trust in NGOs globally remains largely positive but is down from 2013

Trust in NGOs

Net Trust*, Average of 17 Countries**, 2001–2017

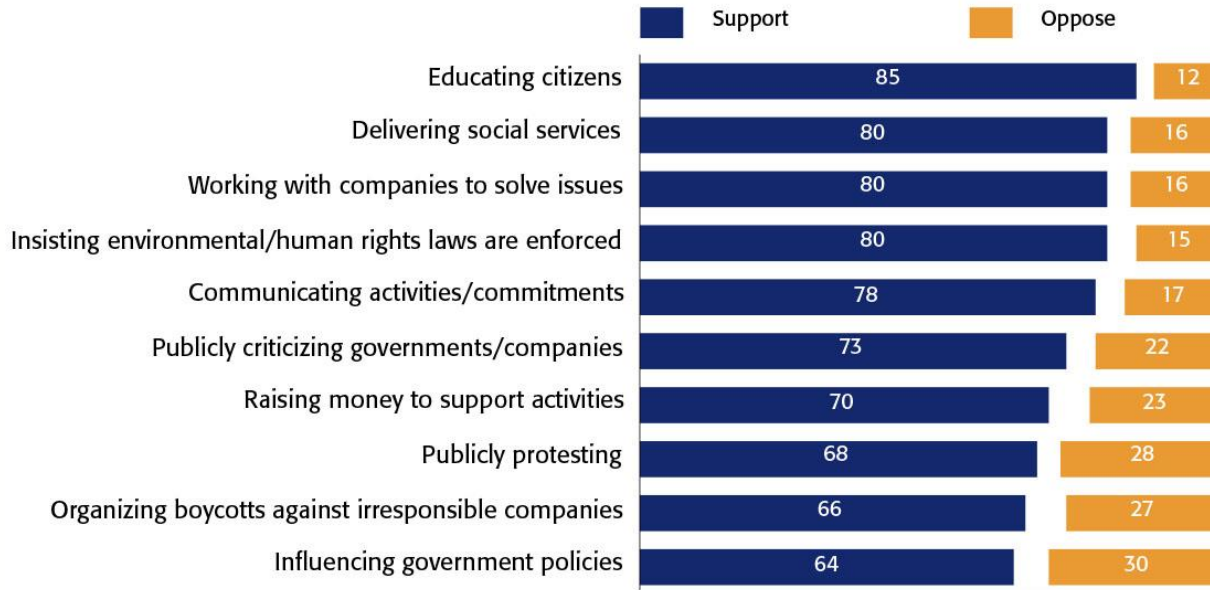*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

**Includes Australia, Brazil, Canada, Chile, China, France, Germany, India, Indonesia, Kenya. Mexico. Nigeria. Russia. Spain. Turkey. UK and USA

Q. Please tell me how much you trust each of the following institutions to operate in the best interest of our society.

Asked about NGO activities, the global public most likely to support NGOs educating citizens on environmental and social issues

Support for Environmental and Social Groups' Actions
Average of 15 Countries,* 2016

Legend: Support (blue), Oppose (orange)

Action	Support	Oppose
Educating citizens	85	12
Delivering social services	80	16
Working with companies to solve issues	80	16
Insisting environmental/human rights laws are enforced	80	15
Communicating activities/commitments	78	17
Publicly criticizing governments/companies	73	22
Raising money to support activities	70	23
Publicly protesting	68	28
Organizing boycotts against irresponsible companies	66	27
Influencing government policies	64	30

*Includes Chile, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Russia, South Korea, Spain, UK, and USA
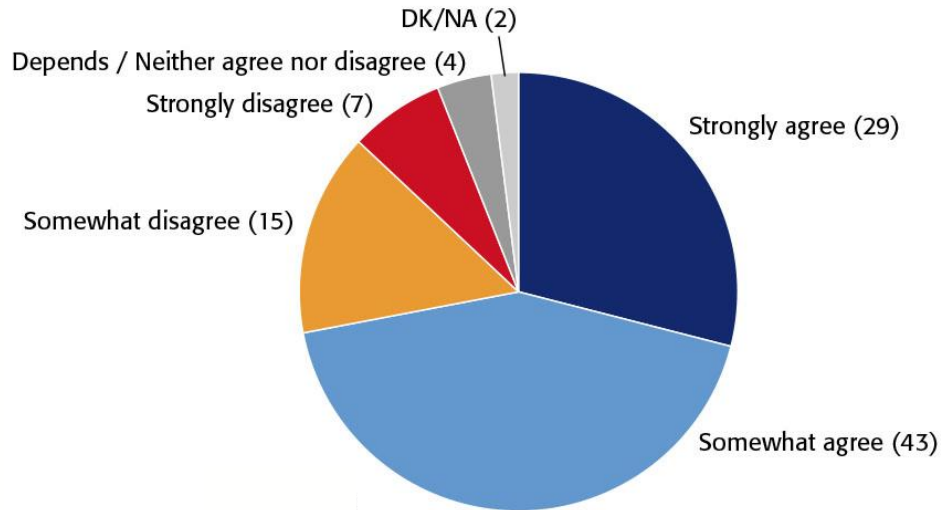The white space in this chart represents "DK/NA."

Q. Now I would like to ask you about the activities of environmental and social groups, what some people call charities, non-governmental organizations, or NGOs. Please tell me whether you support or oppose these groups' involvement in each of the following.

A majority of the global public – nearly three-quarters – say their respect for a company would increase if it partnered with an NGO

Respect for Company Would Go Up if Partnered with Charity/NGO
Average of 21 Countries,* 2016

DK/NA (2)
Depends / Neither agree nor disagree (4)
Strongly disagree (7)
Somewhat disagree (15)
Strongly agree (29)
Somewhat agree (43)

*Includes Argentina, Brazil, Canada, Chile, China, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, Turkey, UK, and USA

Q. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements – My respect for a company would go up if it partnered with a charitable or non-governmental organization to help solve social problems.
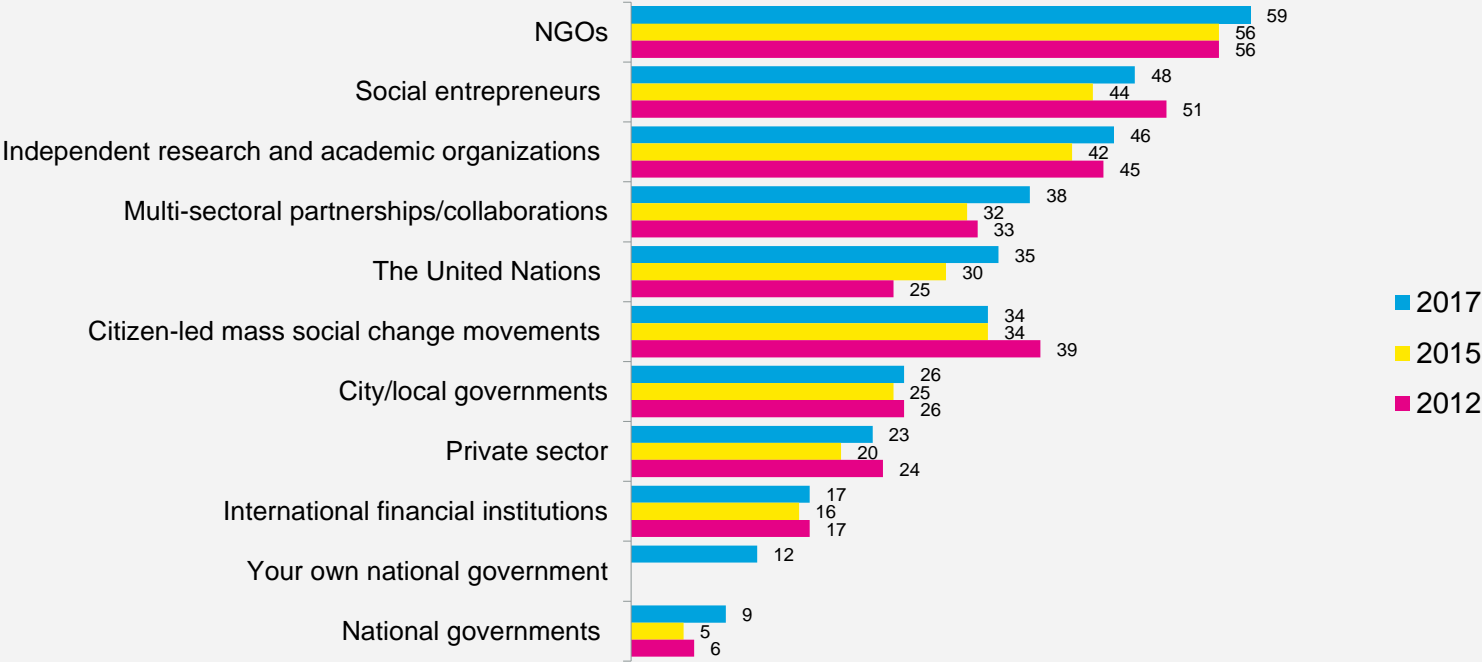
GLOBESCAN

NGOs viewed as contributing greatly to the transition to SD
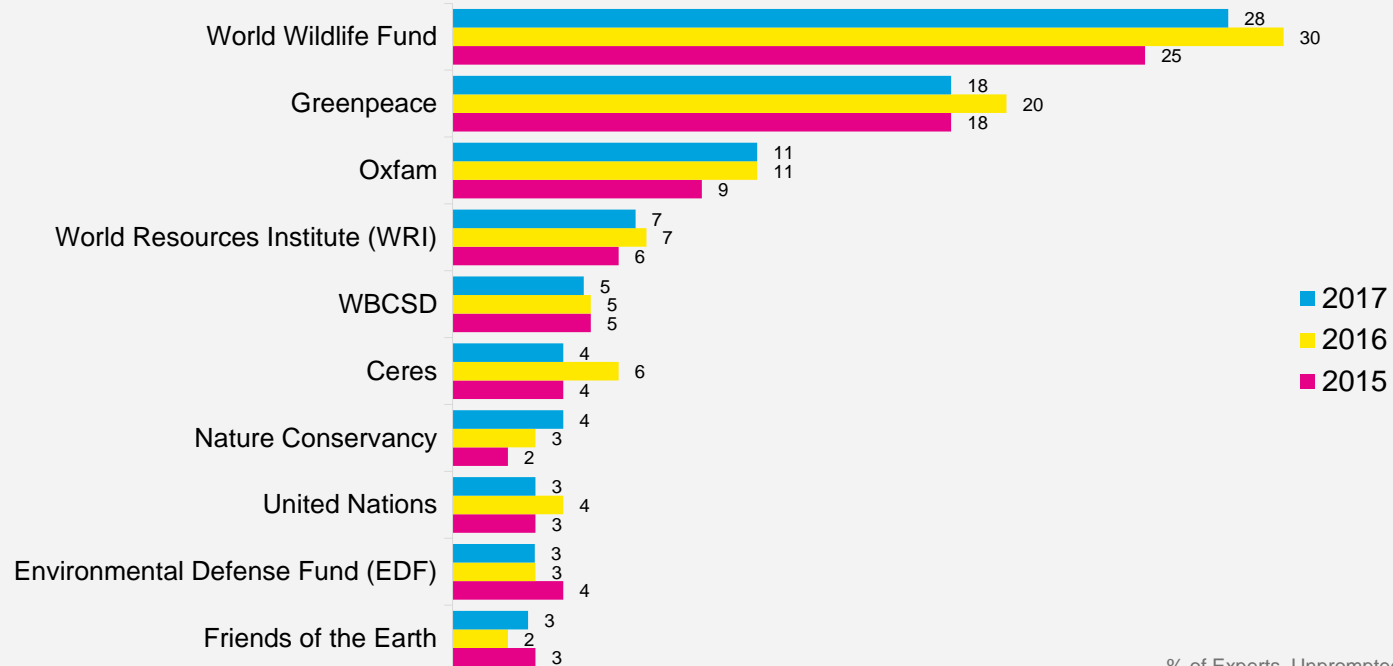
"Good Performance"

Question: How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio? *Please use a scale where 1 is "poor" and 5 is "excellent.*

Organization	2017	2015	2012
NGOs	59	56	56
Social entrepreneurs	48	44	51
Independent research and academic organizations	46	42	45
Multi-sectoral partnerships/collaborations	38	32	33
The United Nations	35	30	25
Citizen-led mass social change movements	34	34	39
City/local governments	26	25	26
Private sector	23	20	24
International financial institutions	17	16	17
Your own national government	12		
National governments	9	5	6

% of Experts, "Excellent" (4+5), 2012–2017

The **GlobeScan–SustainAbility** Survey

GLOBESCAN SustainAbility SB

WWF, Greenpeace, Oxfam and WRI recognized as leaders

Question: What specific NGOs do you think are leaders in advancing sustainable development?
Please enter up to two responses in the spaces provided.

Chart: % of Experts, Unprompted, Total Mentions, 2015–2017

NGO	2017	2016	2015
World Wildlife Fund	28	30	25
Greenpeace	18	20	18
Oxfam	11	11	9
World Resources Institute (WRI)	7	7	6
WBCSD	5	5	5
Ceres	4	6	4
Nature Conservancy	4	3	2
United Nations	3	4	3
Environmental Defense Fund (EDF)	3	3	4
Friends of the Earth	3	2	3

GLOBESCAN SustainAbility SB

Collaboration, innovation and scale are drivers of NGO leadership

Question: Why do you think [insert NGO] is a leader in sustainable development?
Please enter up to two responses in the spaces provided.

Response	%
Stakeholder engagement / education / collaboration	29
Innovation / science-based / knowledge	16
Scale/reach of initiatives (global)	13
Activist/militant/visionary	10
Protects environment / environmental policies	9
Industry leader / setting standards	8
Communication / reporting / education	6
Integrated sustainability values	6
Long-term commitment / experience / consistent	5
Pragmatic / sensitive to markets/reality	4
Focused/clear	4
Ambitious targets/policies / adherence to UN SGDs	4

% of Experts, Unprompted, Total Mentions, 2017

GLOBESCAN SustainAbility SB

How SIGWATCH measures NGO sentiment

Typical NGO campaigning action logged by SIGWATCH:

Telcos lagging behind tech companies in protecting user data – report

Jul 26, 2017 U.S. – Electronics Frontier Foundation (EFF) accused telcos of failing to protect their users from intrusion by the U.S. government. In its annual "Who Has Your Back" scorecard, which rates companies on how they respond to government data requests, challenge National Security Letter (NSL) "gag" orders, and support user privacy reforms, EFF said AT&T, Comcast, T-Mobile, and Verizon were the worst, followed by Amazon and WhatsApp. Facebook, Google, and Microsoft came out best but EFF said these companies could still do more. See https://www.eff.org/press/releases/att-verizon-other-telco-providers-lag-behind-tech-industry-protecting-users https://www.eff.org/who-has-your-back-2017

REPUTATIONAL IMPACTS Amazon -7.5, **AT&T** -15, **Comcast** -11.25, **Facebook** +7.5, **Google / Alphabet** +7.5, **Microsoft** +7.5, **T-Mobile [Deutsche Telekom AG]** -11.25, **Verizon** -15, **WhatsApp Inc [Facebook]** -7.5

Every NGO campaigning action is tagged for companies, brands and projects mentioned in the NGOs' own communications (more accurate, comprehensive and expeditious than media coverage).

Reputational Impact calculated from mention's prominence, strength, and polarity (criticism, praise or neutrality), weighted for size (from local to global) of NGO(s) involved.

Typical Reputational Impact score per campaigning action ranges 10 to 20 points but can be in hundreds if many big NGOs in multiple countries involved.

SIGWATCH logs over 500 NGO actions every month.

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS

NGO sentiment map in 2011-2012

NGO sentiment 2011-2012
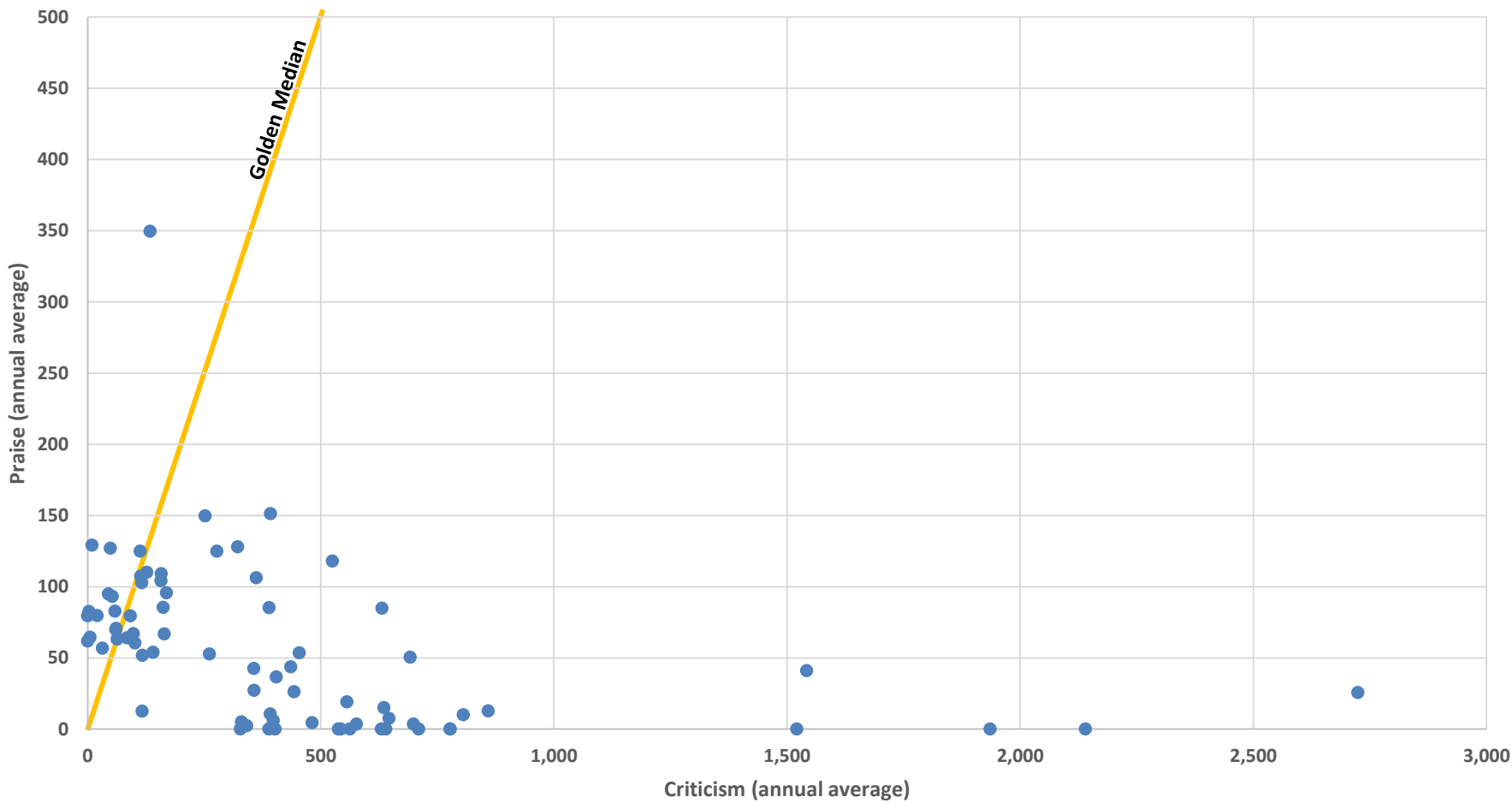
Map plots 80 most praised or criticised corporates

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS

An evolving picture: 2013-2014

NGO sentiment 2013-2014

Map plots 80 most praised and criticised corporates

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS
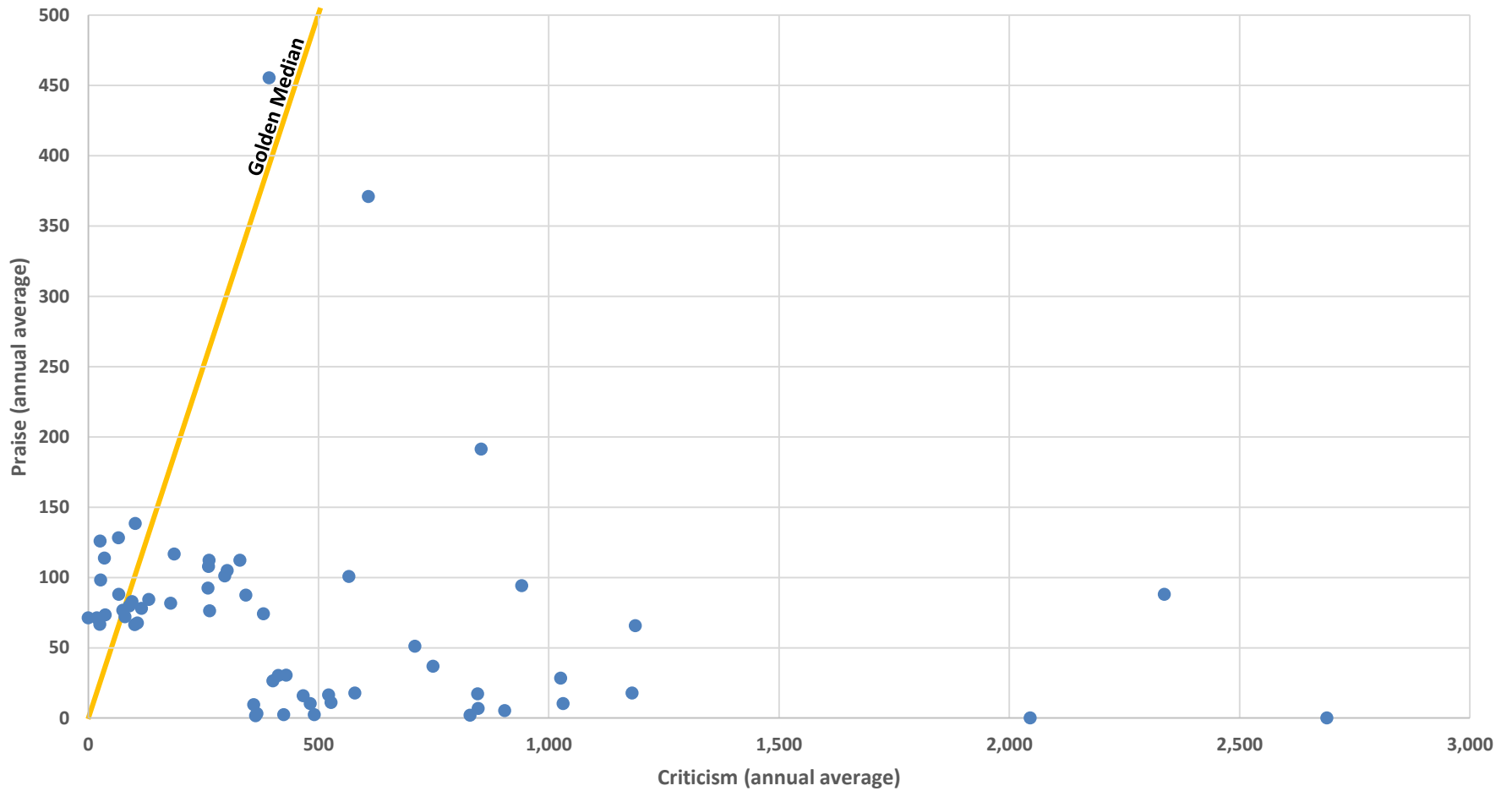
Still evolving: 2015-2016

NGO sentiment 2015-2016

Golden Median

Praise (annual average)

Criticism (annual average)

Map plots 80 most praised and criticised corporates

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS
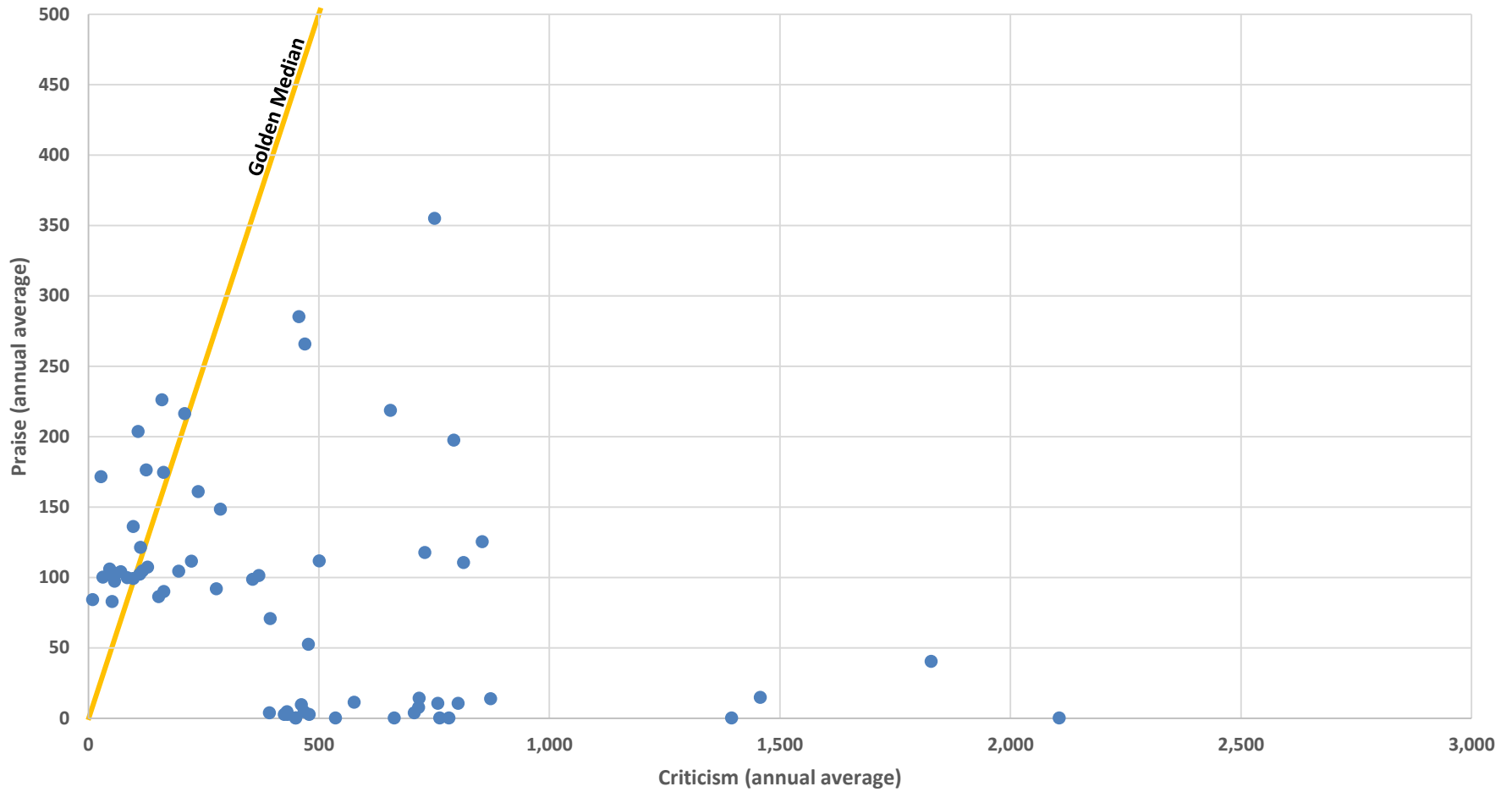
Making sense of this distribution: sentiment types

NGO sentiment 2015-2016

Changemakers

Criticised to change, praised for making change happen

Saints

Well aligned with NGOs

Responders

Beginning to make a difference

Sinners

Struggling to escape criticism

Demons

Too far gone for NGOs to praise

Praise (annual average)

Criticism (annual average)

Map plots 80 most praised and criticised corporates
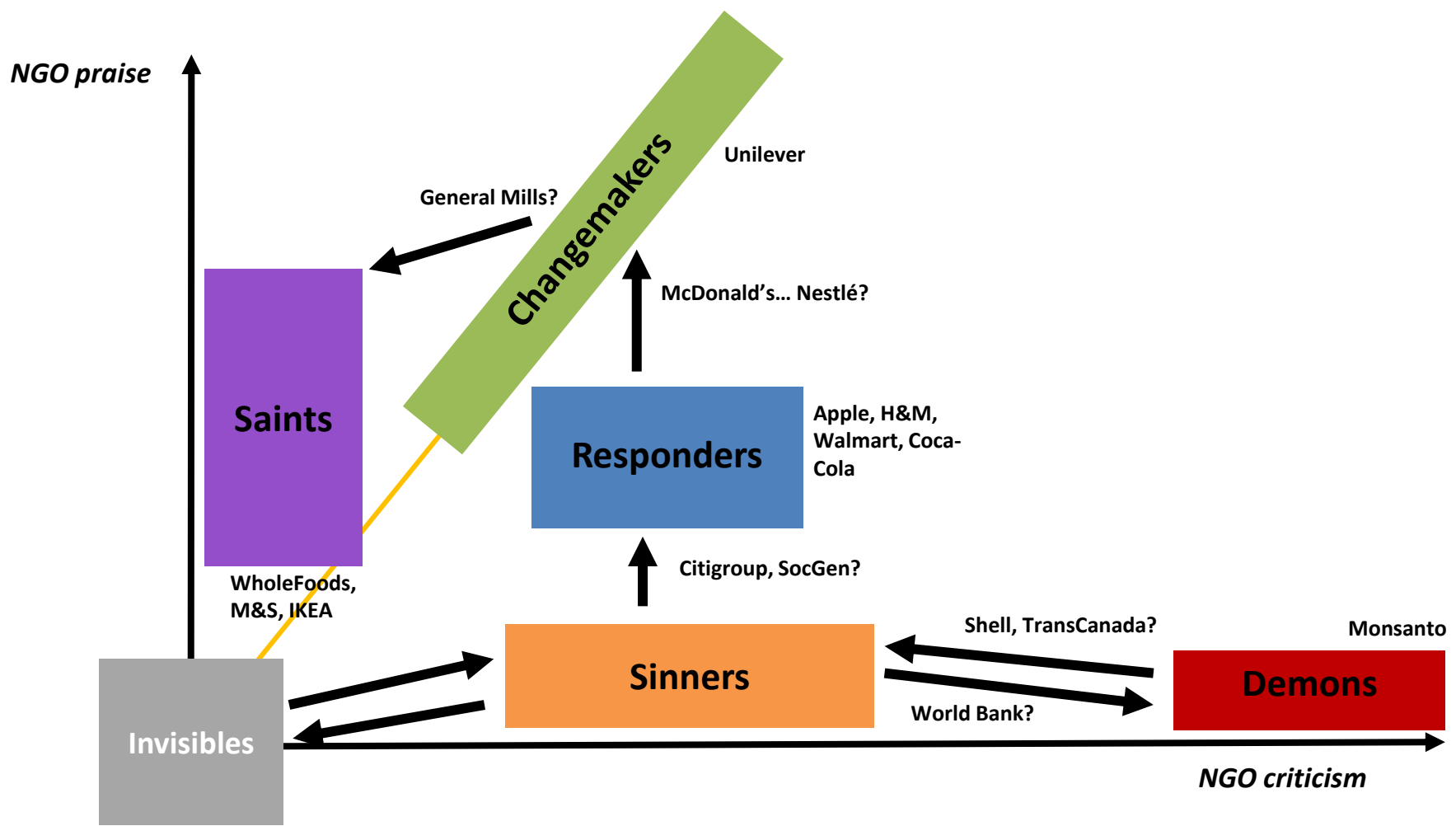
SIGWATCH | NGO TRACKING & ISSUES ANALYSIS

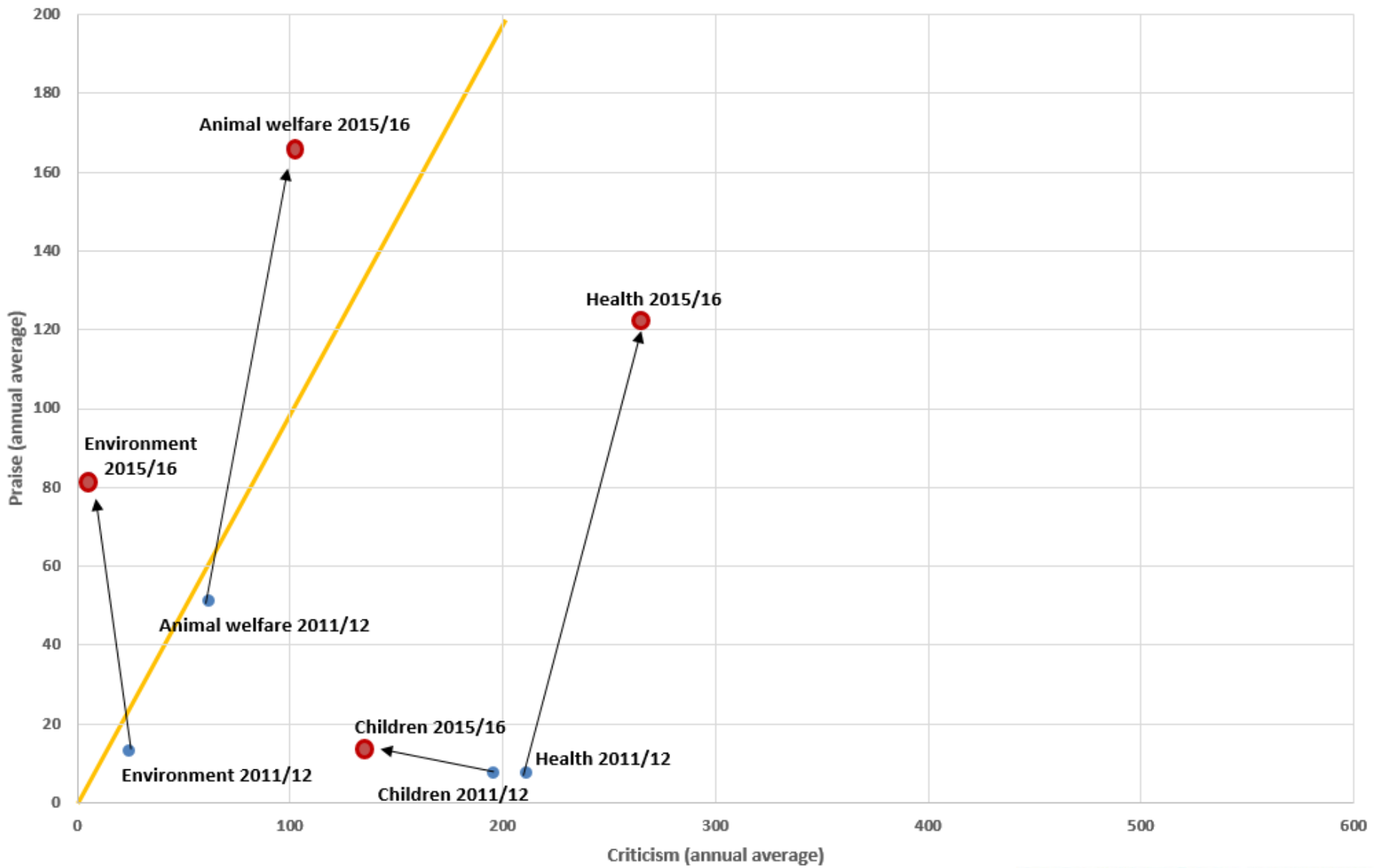# NGO sentiment is dynamic

NGO sentiment 2015-2016
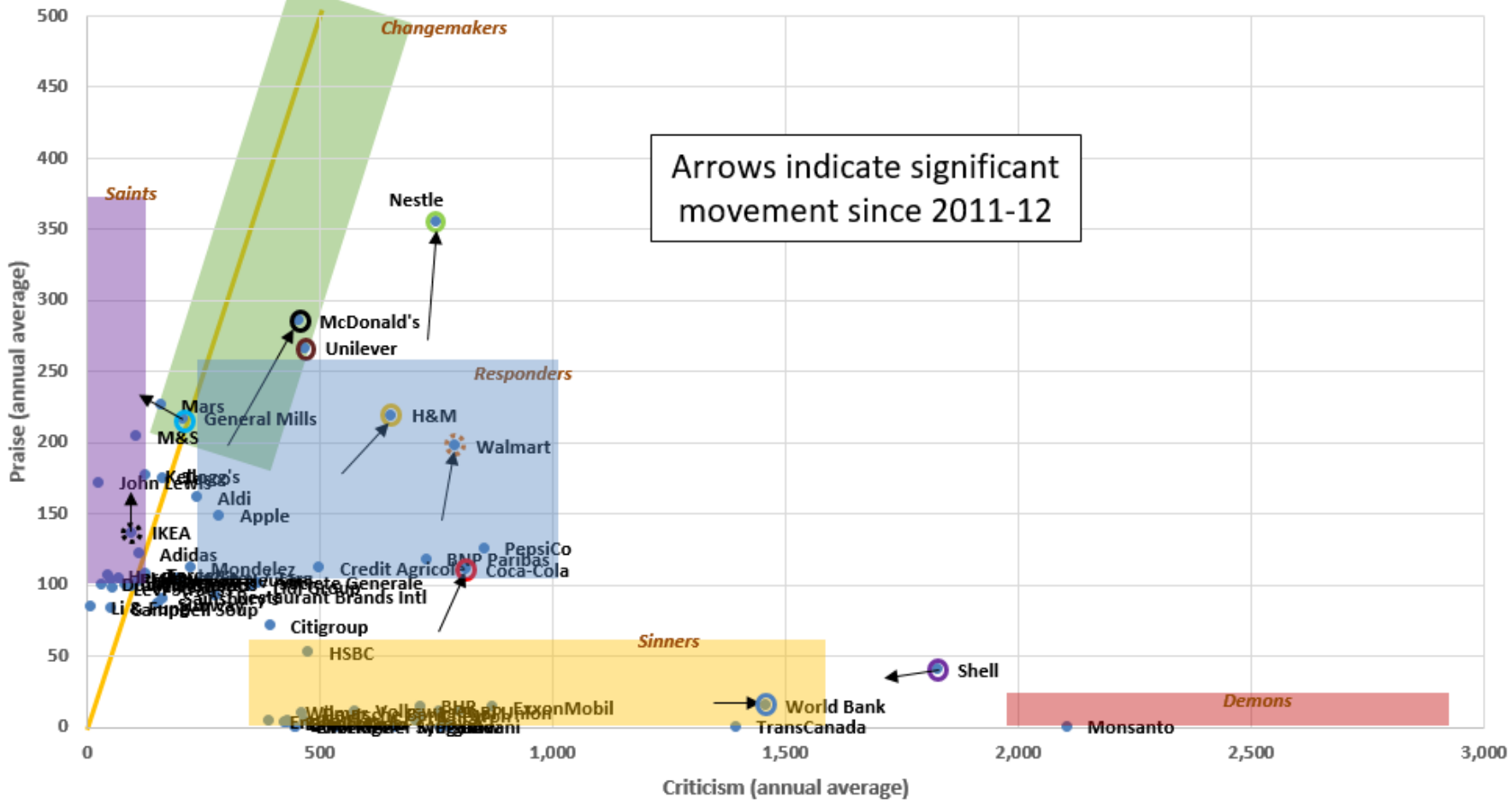
Map plots 80 most praised and criticised corporates
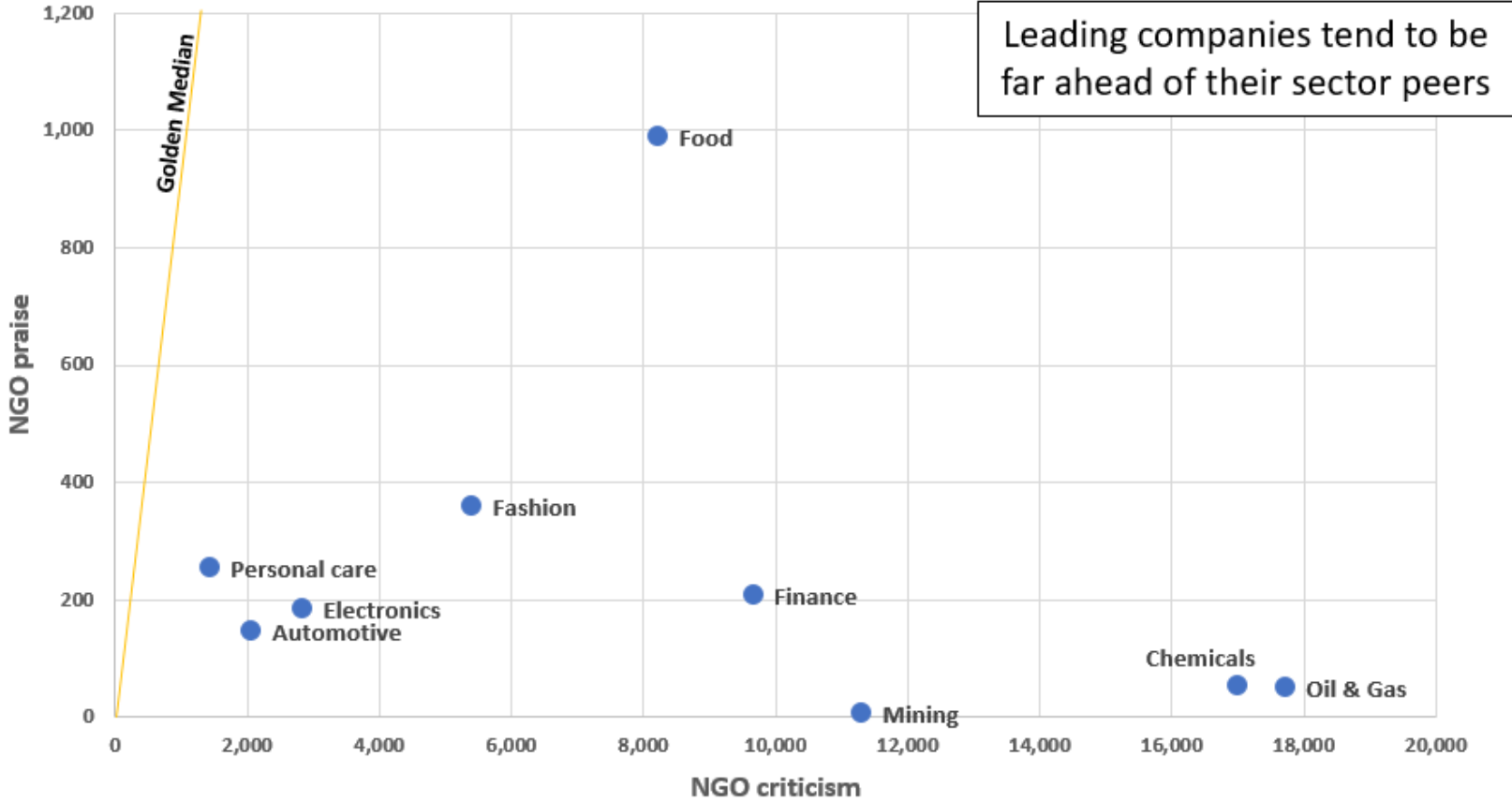
NGO sentiment pathways revealed

Mapping by issue over time: McDonald's
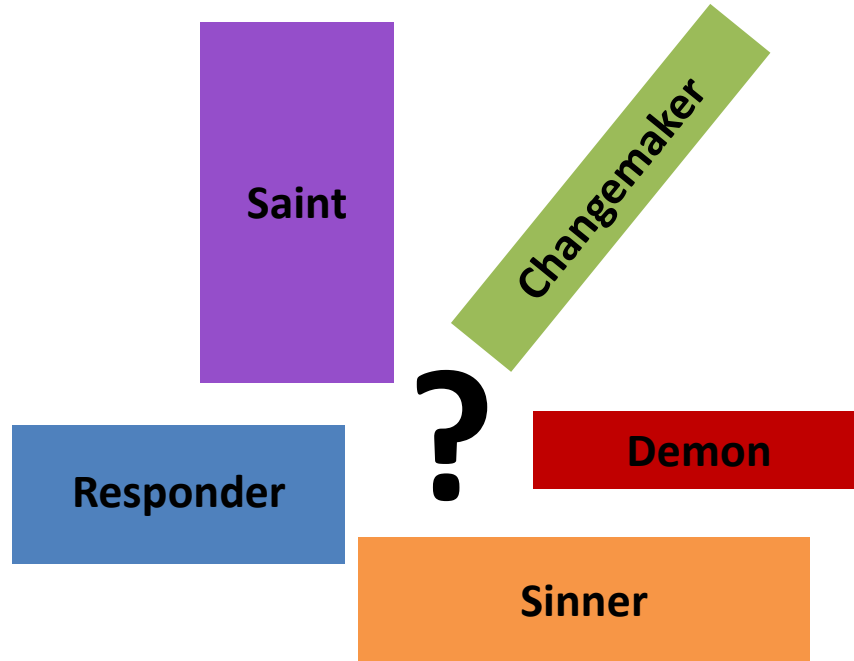

NGO sentiment: McDonalds

Mapping sectors

NGO sentiment map for industry sectors, 2016

Leading companies tend to be far ahead of their sector peers

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS

Divergence reflects sector behaviour

NGO praise

Highly aligned retailers, FMCG

Changemakers

Saints

Responders

FMCG, retailing, consumer electronics

Leading companies tend to be far ahead of their sector peers

Finance, transport

Sinners

'Old' energy, chemicals, mining

Demons

Invisibles

NGO criticism

Which one are you?

SIGWATCH | NGO TRACKING & ISSUES ANALYSIS

Moving the NGO Needle

Lee Anderson
Director, Issues Management & State Government Relations
General Mills

July 2017

General Mills: Serving the World by Making Food People Love

- Our brands are adored in 100 markets on six continents

- Our team of 39,000 employees brings passion & creativity to work each day

- We're one of the largest makers of natural and organic foods in the U.S.

Häagen-Dazs

Pillsbury

NATURE VALLEY

FIBER One

Yoplait

Cheerios

OLD EL PASO SINCE 1938

Betty Crocker

Quality Foods
PROGRESSO

FOUNDED IN SKAGIT VALLEY WA
Cascadian Farm
ORGANIC
SINCE 1972

MUIR GLEN Organic

Annie's

LÄRABAR

Totino's

Cinnamon Toast Crunch

LATINA

KITANO

Yoki 与喜

Hamburger Helper

JUS·ROL

湾仔码头

General Mills
Making Food People Love

Focused, Effective Philanthropy

Total Company Giving

$147.2MM

- Foundation
- Food Donations
- Corporate Contributions

$26.4MM
$63.9MM
$56.9MM
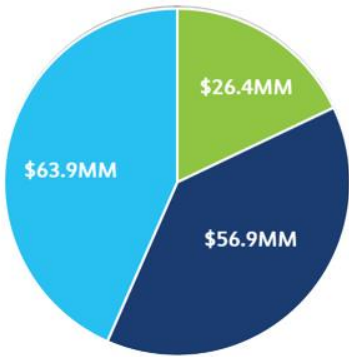
INCREASING food security
Expanding food access for families & communities.

ADVANCING sustainable agriculture
Empowering growers, protecting habitat & conserving natural resources.

STRENGTHENING hometown communities
Strengthening our hometown communities around the globe.

Global Focus Areas

General Mills Making Food People Love

treat THE WORLD WITH CARE

Sustainability Efforts – Treat the World with Care

Our Farmers

Our business thrives when smallholder farmers and their communities thrive.

Our Planet

The health of our business depends on the health of our planet.
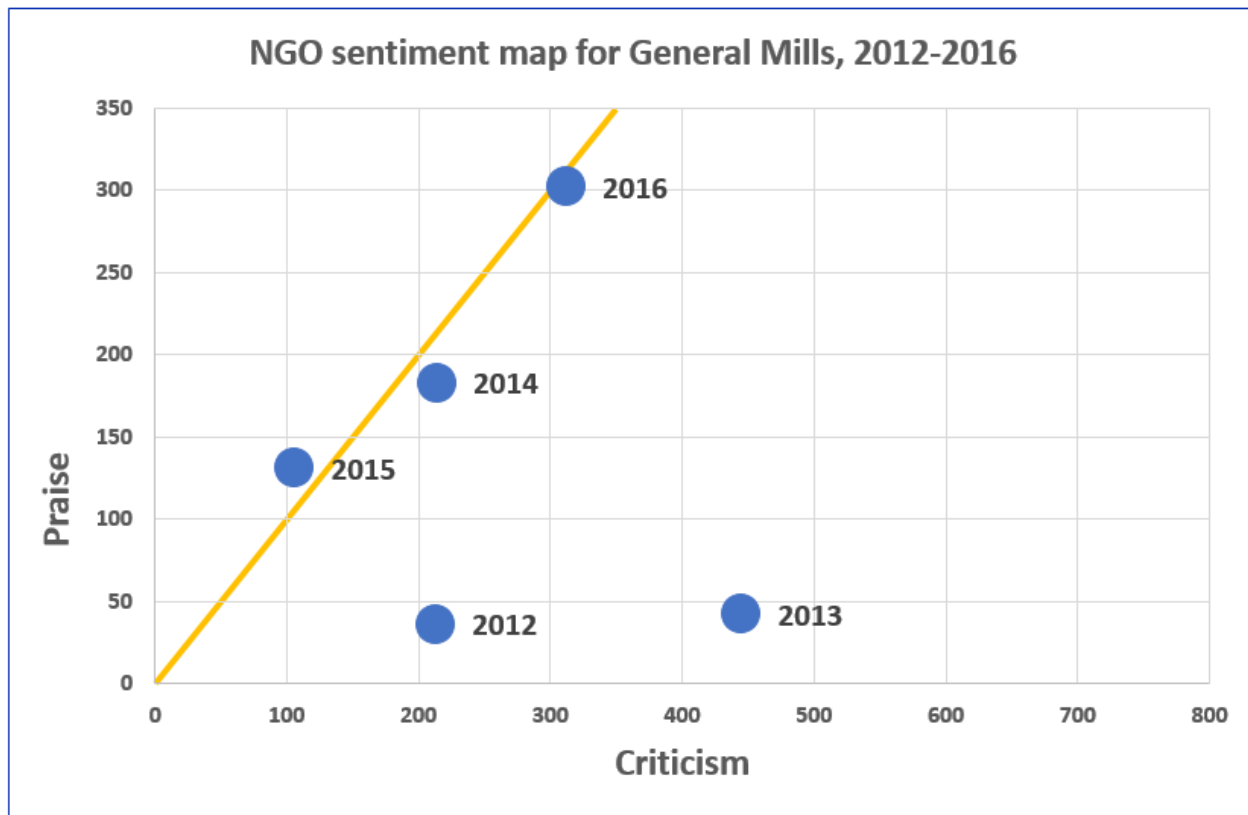
healthy watersheds

a stable climate

strong ecosystems

General Mills
Making Food People Love

- 2012-2013 – U.S. GMO Labeling

- 2014 – commitments on palm oil, GHG and water stewardship

- 2015 – radical new commitment on GHG – first CPG to commit supply-chain wide

- 2016 – pollinators, 100% sustainable palm oil

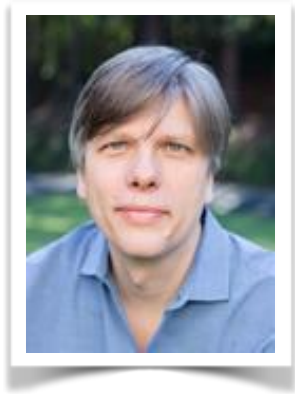NGO sentiment map for General Mills, 2012-2016

Issues Management & Stakeholder Engagement: Focused, Results-Driven Efforts

- Dedicated staff leading global, cross-functional teams

- Identify, Analyze, Prioritize, Act

- Global stakeholder mapping

- Collaborative, transparent, engaging

"**General Mills' supply chain projects in pollinator conservation represent the largest private sector investment of its kind in the world.**" - Eric Lee-Mäder, Pollinator Program Co-Director, the Xerces Society for Invertebrate Conservation

General Mills
Making Food
People Love

Panel Discussion & Audience Q&A

Chris Coulter
CEO
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