Saint, Sinner or Changemaker?

Mapping NGO Sentiment to Inform Stakeholder Engagement and Track Corporate Reputation

27 July 2017
Agenda

- Introductions
- Panelist Presentations
- Q&A
Introductions

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

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

<table>
<thead>
<tr>
<th>Region</th>
<th>NGOs</th>
<th>Global Companies</th>
<th>National Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>50%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>31%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Asia</td>
<td>29%</td>
<td>29%</td>
<td>54%</td>
</tr>
<tr>
<td>Europe</td>
<td>15%</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>Latin America</td>
<td>-31%</td>
<td>-44%</td>
<td>-31%</td>
</tr>
</tbody>
</table>

**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

Q. Please tell me how much you trust each of the following institutions to operate in the best interest of our society.
Trust in NGOs globally remains largely positive but is down from 2013

Trust in NGOs

**"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

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

*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

*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.
Stakeholders: NGOs Leading the Transition to SD
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.”

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

% of Experts, “Excellent” (4+5), 2012–2017
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.*

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

% of Experts, Unprompted, Total Mentions, 2015–2017
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.*

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

% of Experts, Unprompted, Total Mentions, 2017
Saint, Sinner or Changemaker?

Mapping NGO sentiment to inform stakeholder engagement and track corporate reputation

Robert Blood

GlobeScan-SIGWATCH webinar, 27 July 2017
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/press/releases/att-verizon-other-telco-providers-lag-behind-tech-industry-protecting-users)


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.**
NGO sentiment map in 2011-2012

Map plots 80 most praised or criticised corporates
An evolving picture: 2013-2014

NGO sentiment 2013-2014

Map plots 80 most praised and criticised corporates
Still evolving: 2015-2016

Map plots 80 most praised and criticised corporates
Making sense of this distribution: sentiment types

Map plots 80 most praised and criticised corporates
NGO sentiment is dynamic

Map plots 80 most praised and criticised corporates

Arrows indicate significant movement since 2011-12
NGO sentiment pathways revealed

**Saints**
- WholeFoods, M&S, IKEA

**Responders**
- Apple, H&M, Walmart, Coca-Cola
- Citigroup, SocGen?

**Sinners**
- Shell, TransCanada?
- World Bank?

**Demons**
- Monsanto

**Changemakers**
- General Mills?
- McDonald’s... Nestlé?
- Unilever

**Invisibles**

**NGO praise**

**NGO criticism**
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
Divergence reflects sector behaviour

- **Saints**: Highly aligned retailers, FMCG
- **Responders**: FMCG, retailing, consumer electronics
- **Sinners**: Finance, transport
- **Demons**: ‘Old’ energy, chemicals, mining

Leading companies tend to be far ahead of their sector peers.
Which one are you?
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.
Focused, Effective Philanthropy

Total Company Giving

$147.2MM

- $63.9MM Foundation
- $26.4MM Food Donations
- $56.9MM Corporate Contributions

Global Focus Areas

- 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.

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
• 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
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
Panel Discussion & Audience Q&A

Chris Coulter
CEO
GlobeScan

Robert Blood
Founder and Managing Director
SIGWATCH

Lee Anderson
Director of State and Local Government Relations
General Mills