



Business & Society: *Societal Trends and Corporate Leadership*

Webinar: September 29, 2020

Introductions

Hosts



Perrine Bouhana
Director
GlobeScan



Chris Coulter
Chief Executive Officer
GlobeScan

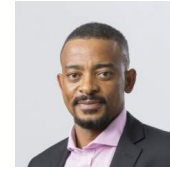
Speakers



Pia Heidenmark Cook
Chief Sustainability Officer
Ingka Group (IKEA)



Francesca DeBiase
Chief Supply Chain & Sustainability Officer
McDonald's



Mzilla Mthenjane
Executive Head, Stakeholder Affairs
Exxaro



Janice Lao
Director, Group Corporate Responsibility & Sustainability
Hong Kong Shanghai Hotels



GLOBESCAN
RADAR 2020

GLOBESCAN
evidence and ideas. applied

Methodology

Participating Countries 2020



R20_particip_map

- Representative online samples of approximately 1,000 adults per country in each of 27 countries
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June 2020
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

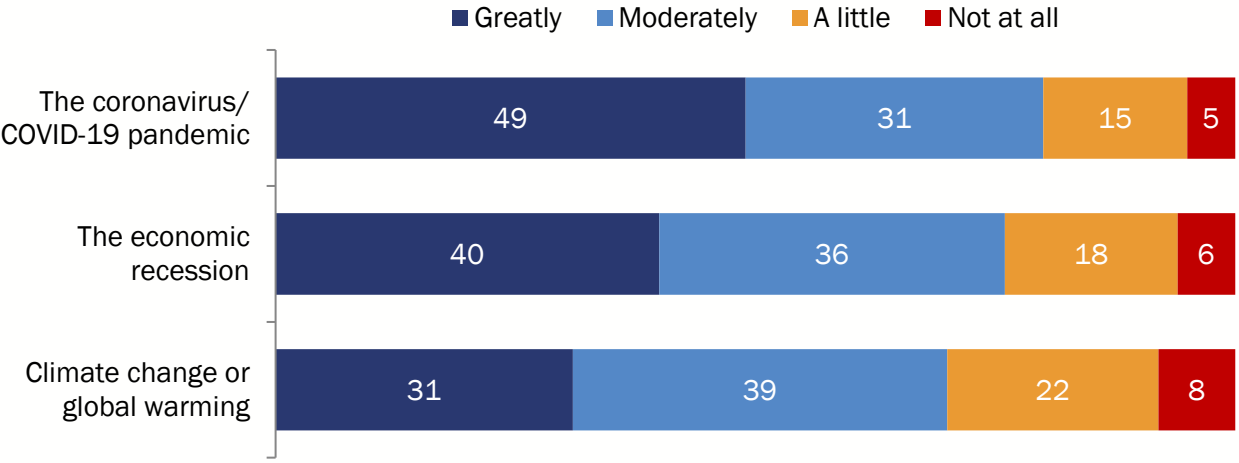
Key Trends



1. The COVID-19 pandemic has had a more severe impact on the most vulnerable
2. Strong concern about climate change and the environment persists despite the current crisis
3. The crisis has brought increased public trust in science but also in business and government
4. The business case for sustainable and responsible business has strengthened
5. Strong desires for change: systemic and personal

The COVID-19 pandemic and subsequent recession has had a large impact on many, but so has climate change

Extent Personally Affected by... , Average of 27 Countries, 2020



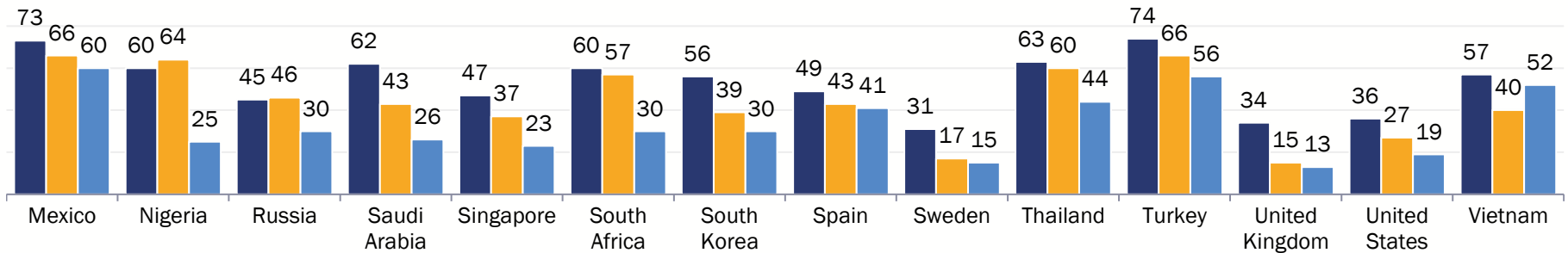
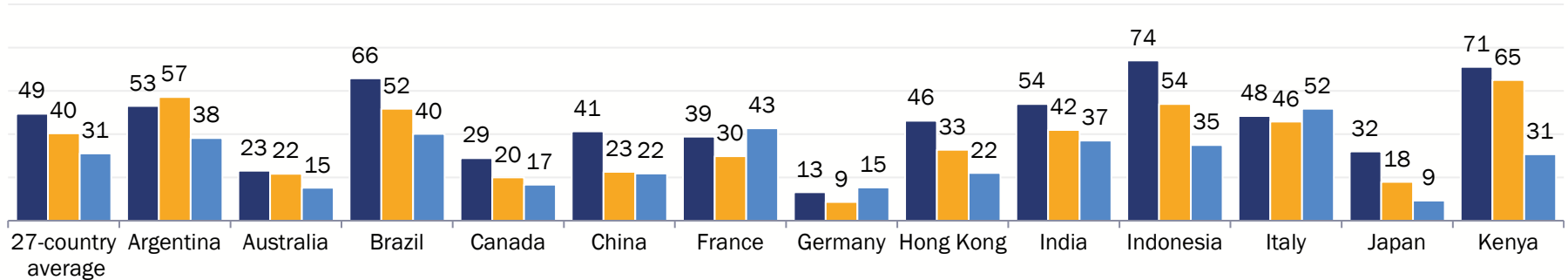
T2. How much are you personally affected by each of the following problems?

Great variability in impacts of great challenges across the world

Extent Personally Affect By..., "Greatly," Average of 27 Countries, 2020



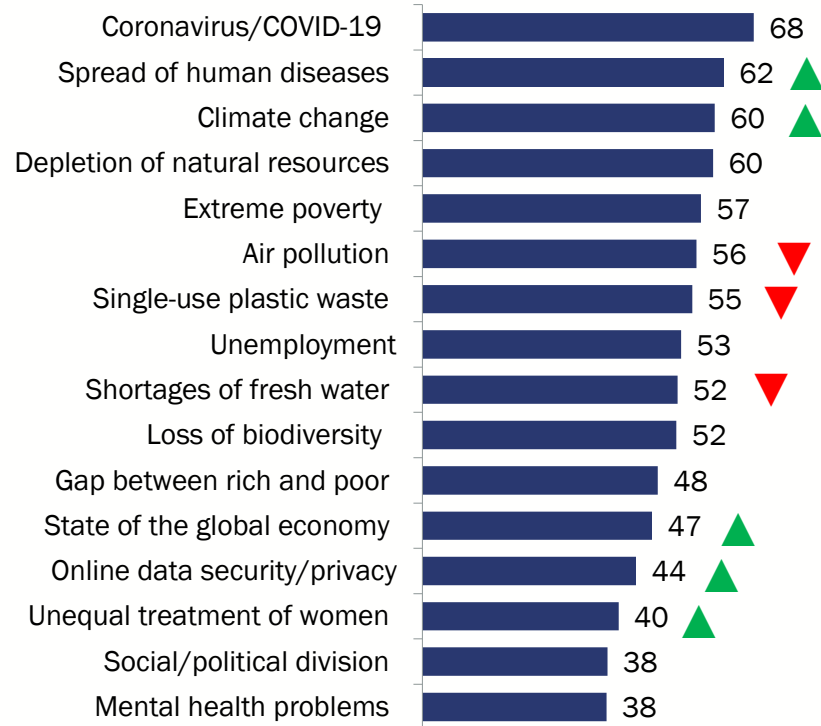
■ The coronavirus/COVID-19 pandemic ■ The economic recession ■ Climate change or global warming



T2. How much are you personally affected by each of the following problems?

Climate change and natural resource depletion are seen to be almost as serious as the pandemic

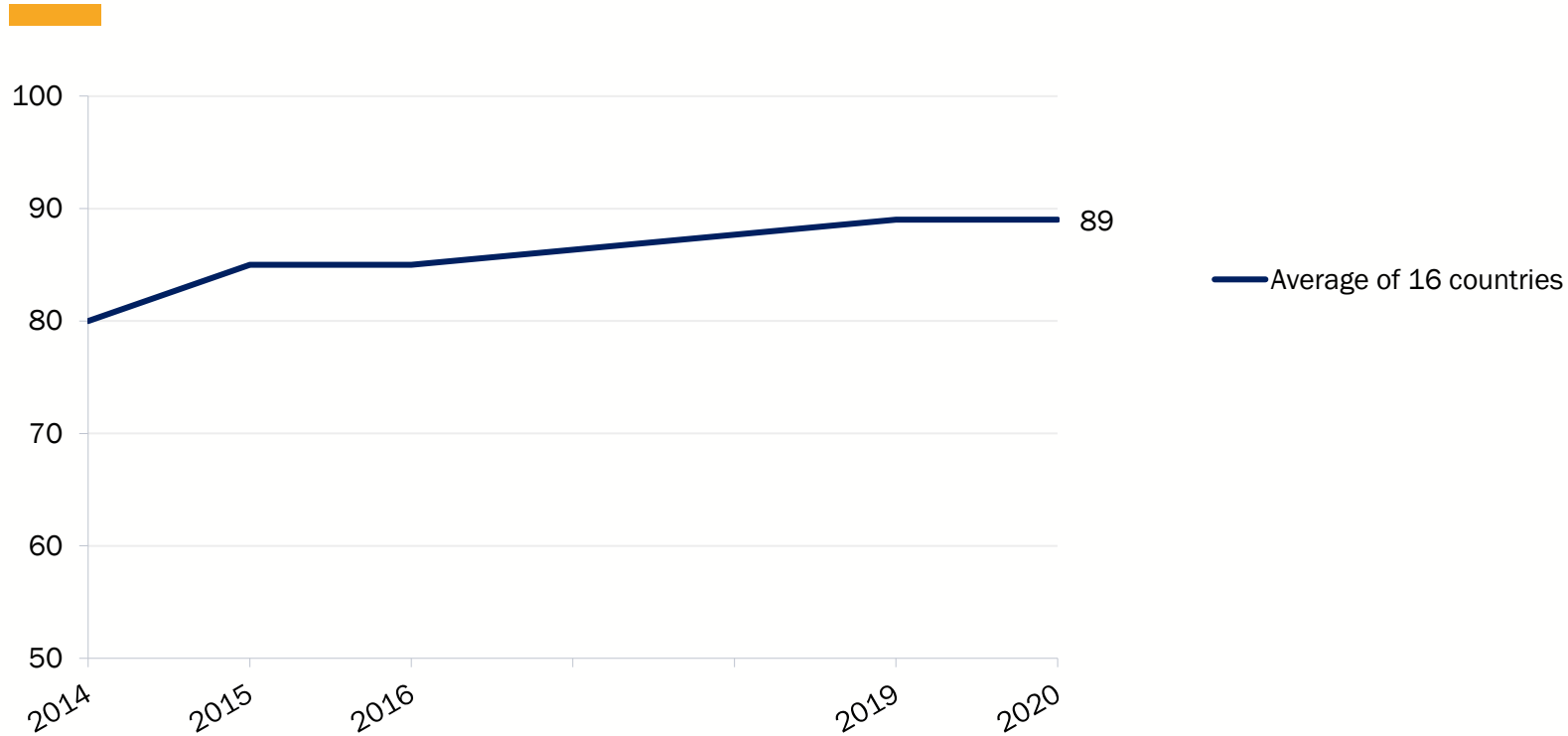
Seriousness of Global Problems, “Very Serious,” Average of 27 Countries, 2020



T1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem

Perceived Seriousness of Climate Change

“Very Serious” and “Somewhat Serious,” Average of 16 Countries,* 2014–2020



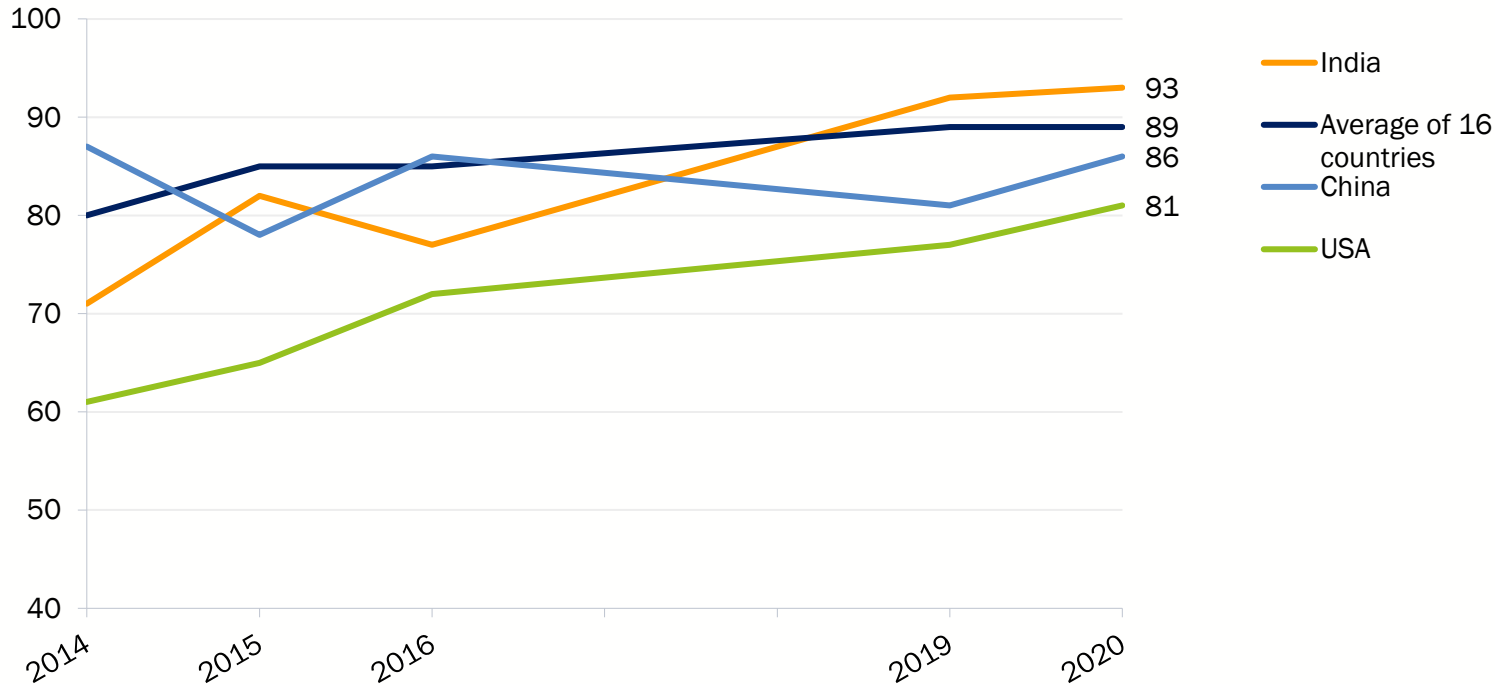
*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Climate change and global warming



Perceived Seriousness of Climate Change

“Very Serious” and “Somewhat Serious,” Increased Concern, Average of 16 Countries* vs Selected Countries, 2014–2020

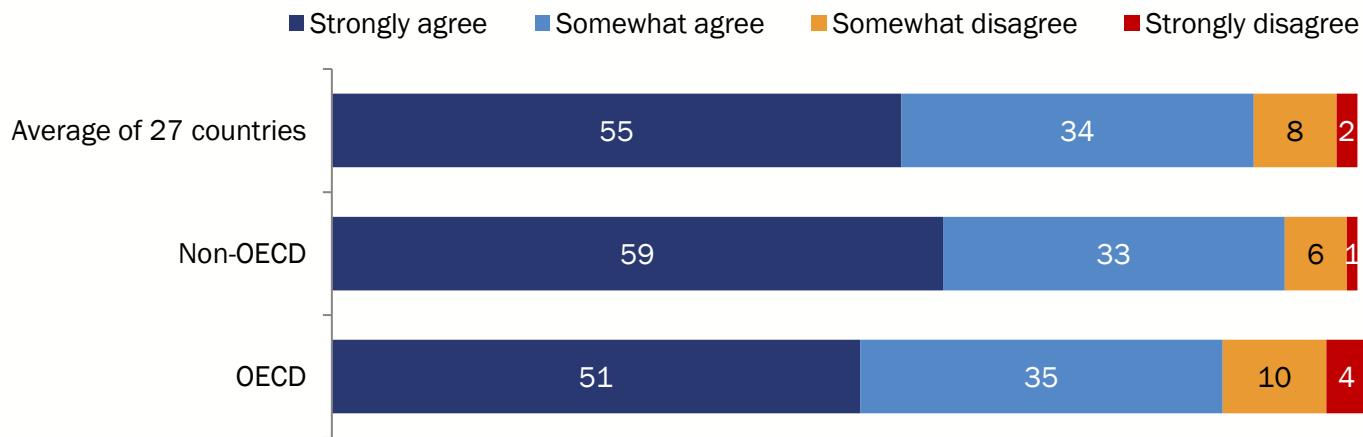


*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Climate change and global warming

There is near universal agreement that society should respond to climate change with same urgency as it has responded to the current pandemic

Society Should Respond to Climate Change with Same Urgency as COVID-19, “Strongly Agree” and “Somewhat Agree,” Average of 27 Countries and by Economic Development,* 2020

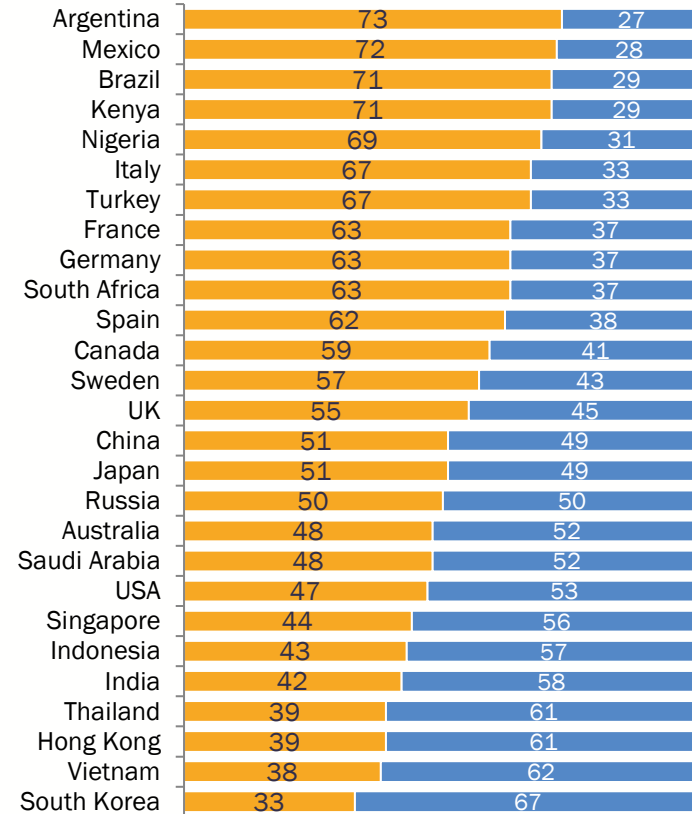
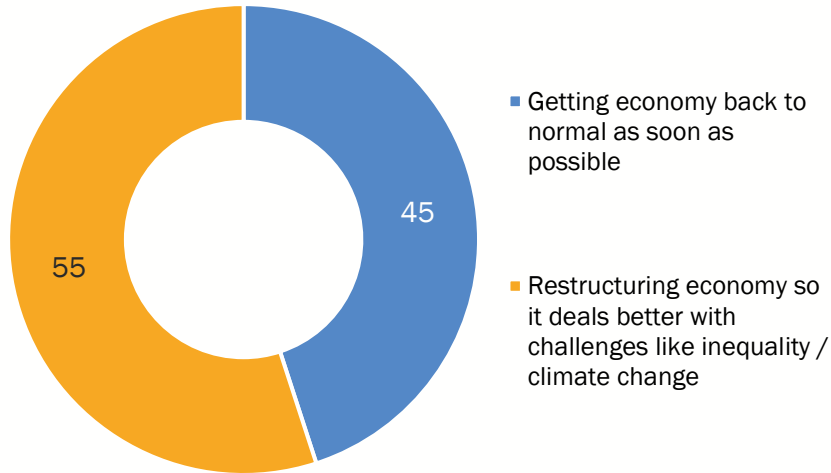


*OECD countries include Australia, Canada, France, Germany, Italy, Japan, Mexico, South Korea, Spain, Sweden, Turkey, UK, USA; Non-OECD countries include Argentina, Brazil, China, Hong Kong, India, Indonesia, Kenya, Nigeria, Russia, Saudi Arabia, Singapore, South Africa, Thailand, Vietnam

T13. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.
– We as a society should respond to climate change with the same urgency as we have responded to the coronavirus/COVID-19 pandemic.

Majorities in most countries want to see a restructuring of the economy post-pandemic, but less so in Asia

Priority for Post-COVID-19 Economic Recovery, Average of 27 Countries and by Country, 2020

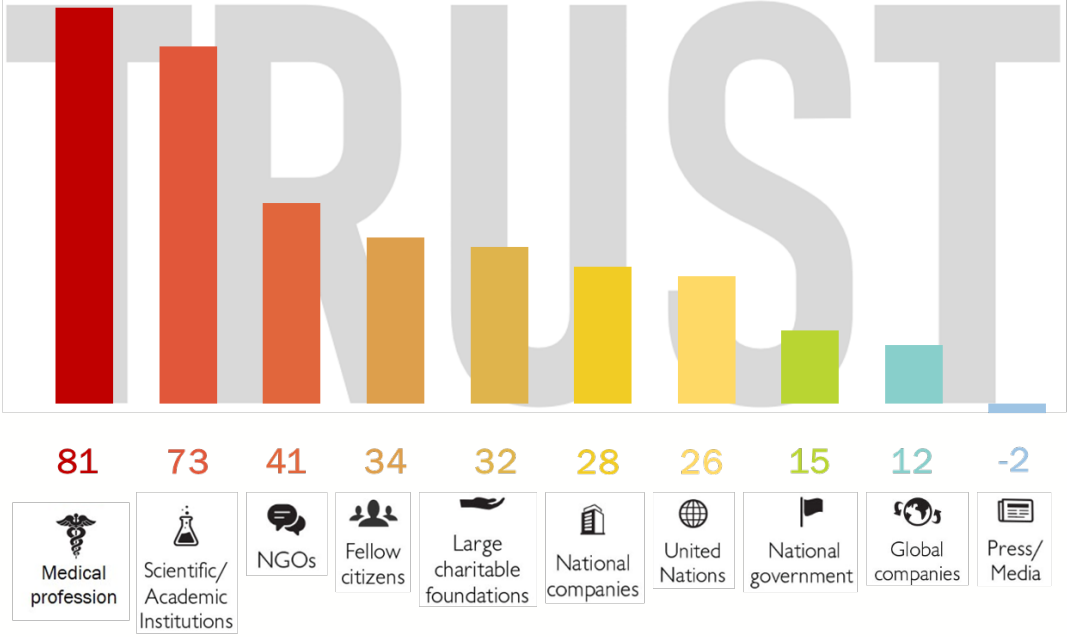


T14. In building the post-COVID-19 economic recovery, do you think the priority should be:

Global companies remain among the least trusted to operate in the best interest of society



Trust in Institutions, Net Trust, * Average of 27 Countries, 2020



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

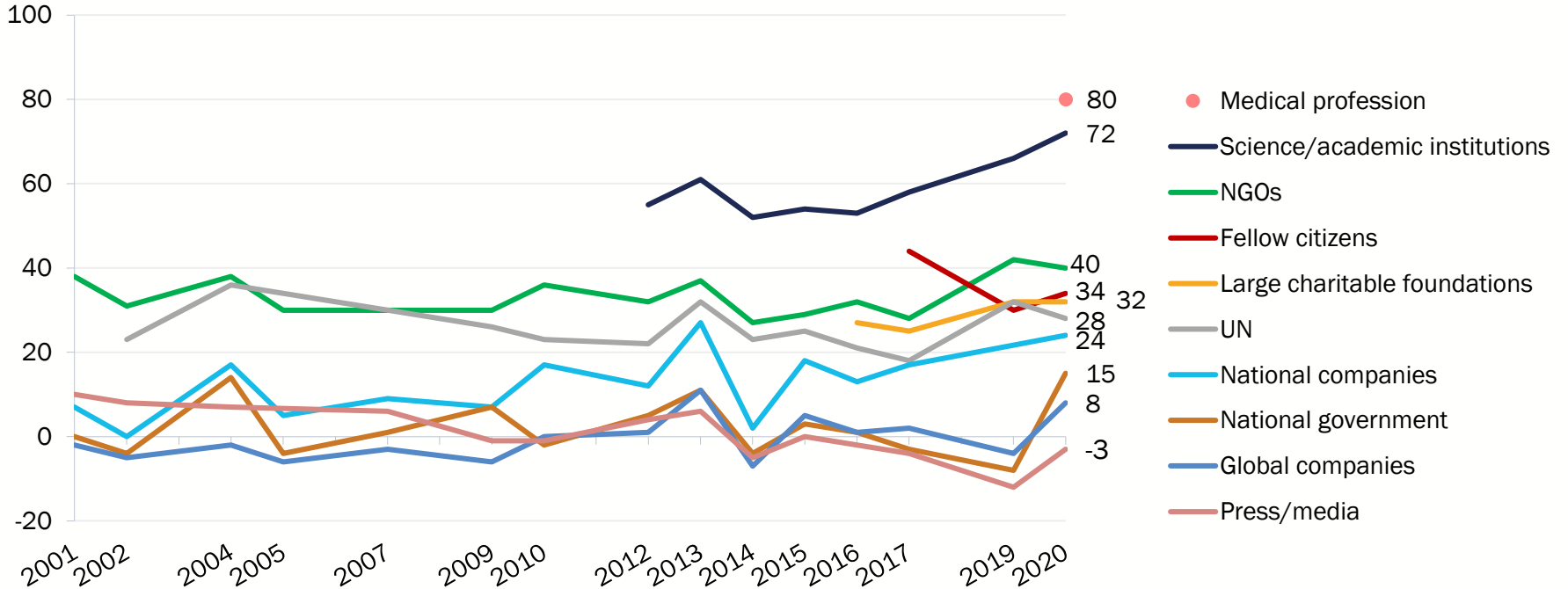
**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

Question: Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

However, there has been an increase in trust in least-trusted institutions, including governments, global companies, and media



Trust in Institutions, Net Trust,* Average of 17 Countries,** 2001–2020



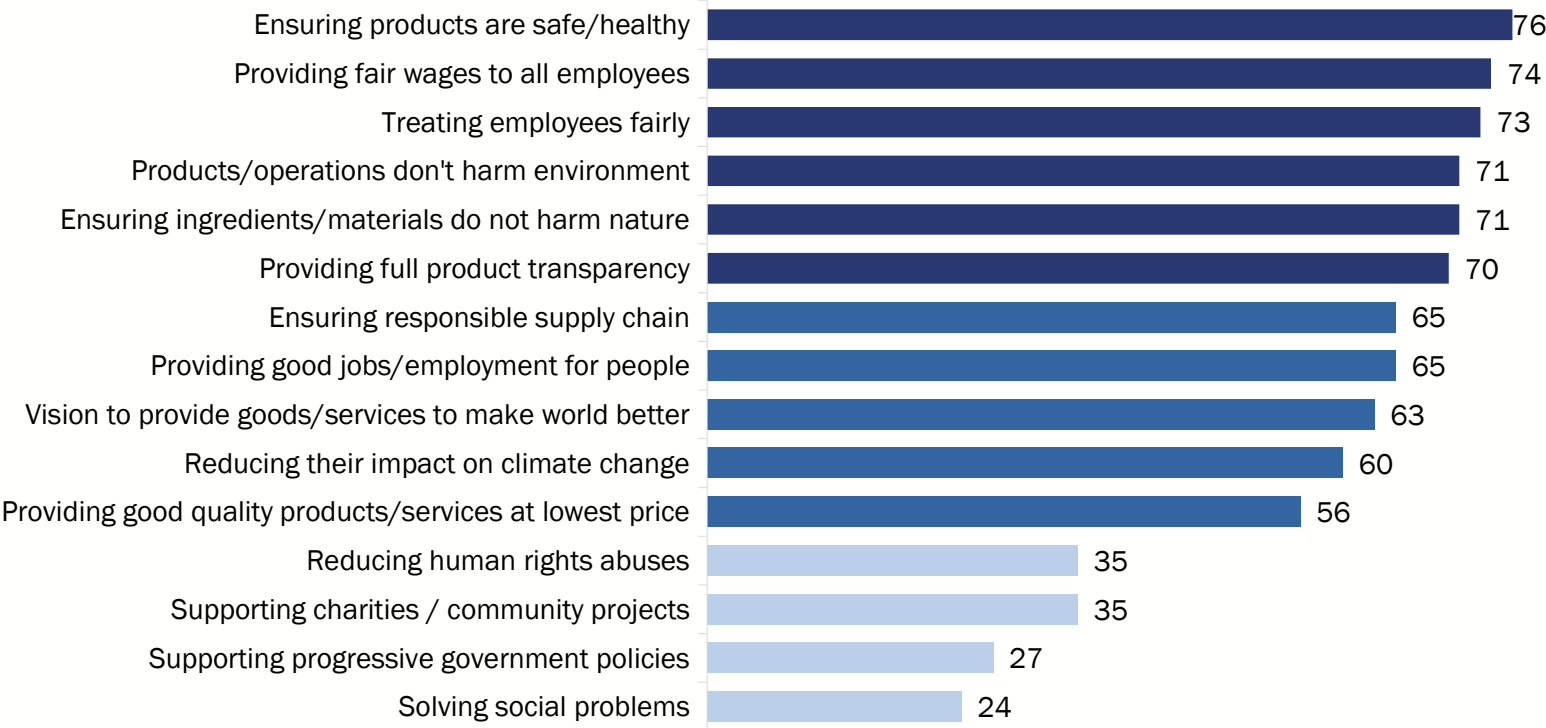
*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

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T3. Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

Public expectations are highest for core operational areas

Expectations of Companies, “Held Responsible For,” Net Expectations,* Average of 27 Countries, 2020

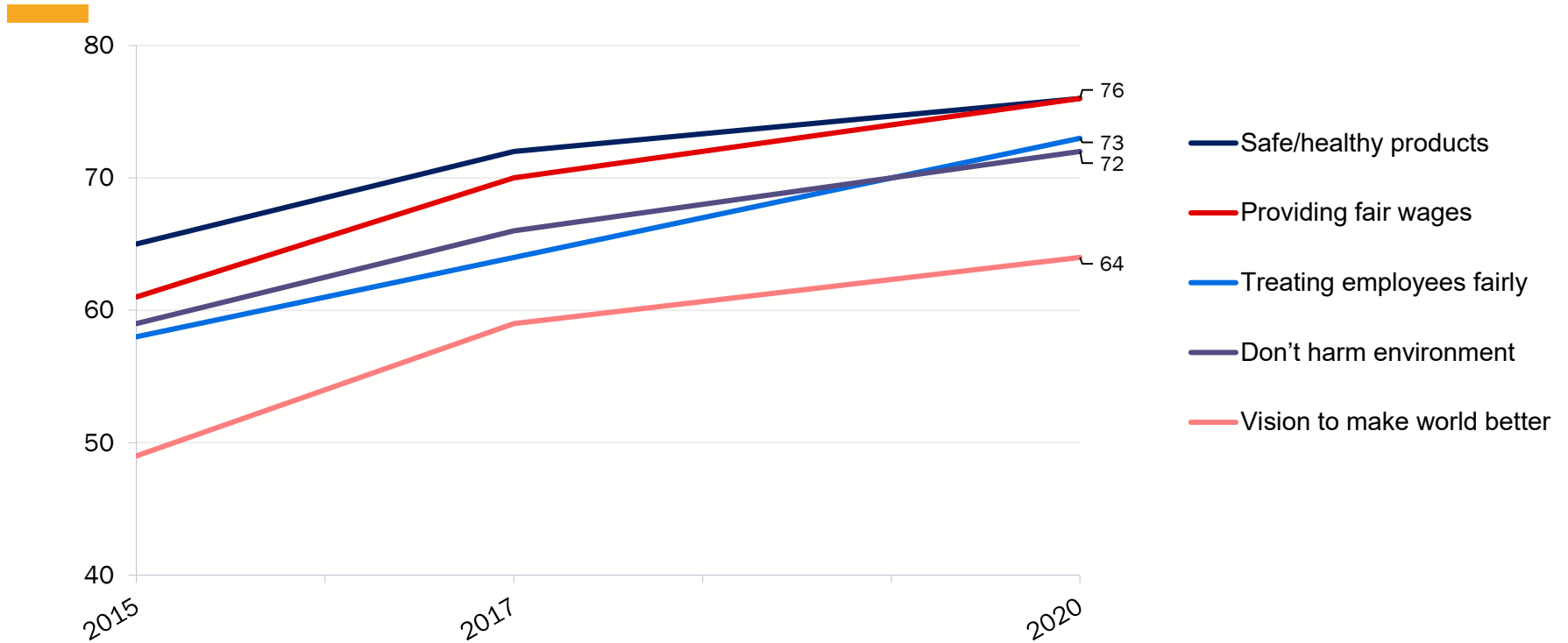


*((4+5) minus (1+2)) on a scale of 1 to 5, where 1 is “Not held responsible” and 5 is “Held completely responsible”

T23. Below are things some people say should be part of the responsibilities of large companies. For each one, please indicate to what extent you think companies should be held responsible.

Expectations around core responsibilities are increasing

Expectations of Companies, “Held Responsible For,” Net Expectations,* Average of 20 Countries,** 1999–2020



* $(4+5)$ minus $(1+2)$ on a scale of 1 to 5, where 1 is “Not held responsible” and 5 is “Held completely responsible”

**Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T23. Below are things some people say should be part of the responsibilities of large companies. For each one, please indicate to what extent you think companies should be held responsible.

Sector reputations vary widely but are increasing

Performance of Sectors in Fulfilling Their Responsibilities to Society, Net Performance,*
Average of 27 Countries, 2020



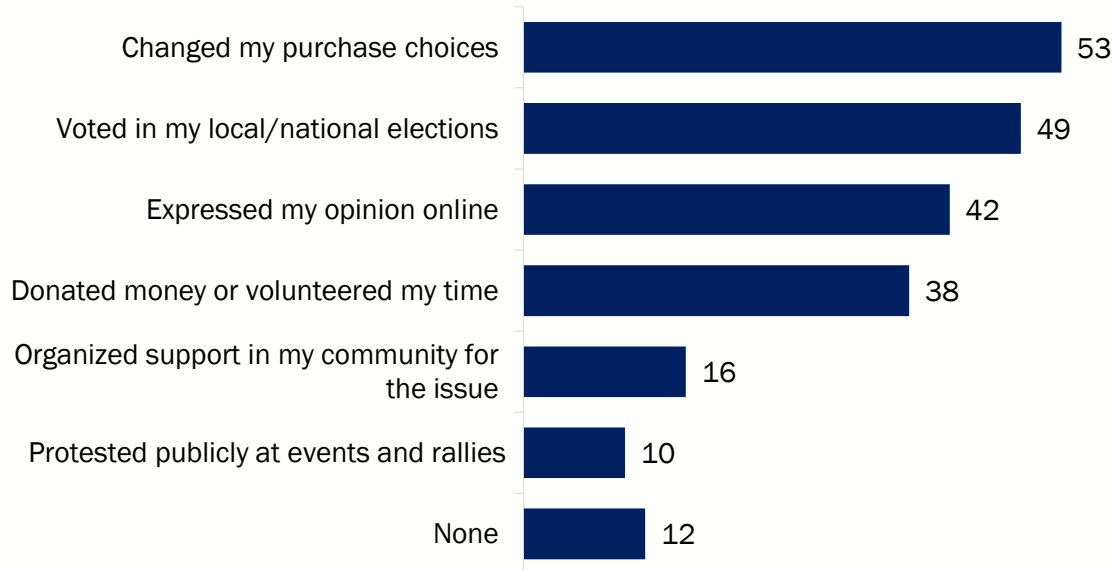
*“Among the very best” and “Above average” minus “Below average” and “Among the very worst”

**Spirit (alcohol) not asked in Indonesia, Saudi Arabia, and Turkey

T25. Please rate each of the following types of companies on how well they fulfil their responsibilities to society compared to other types of companies...

Half of people globally say they have used their buying power to make a difference on an issue they care about

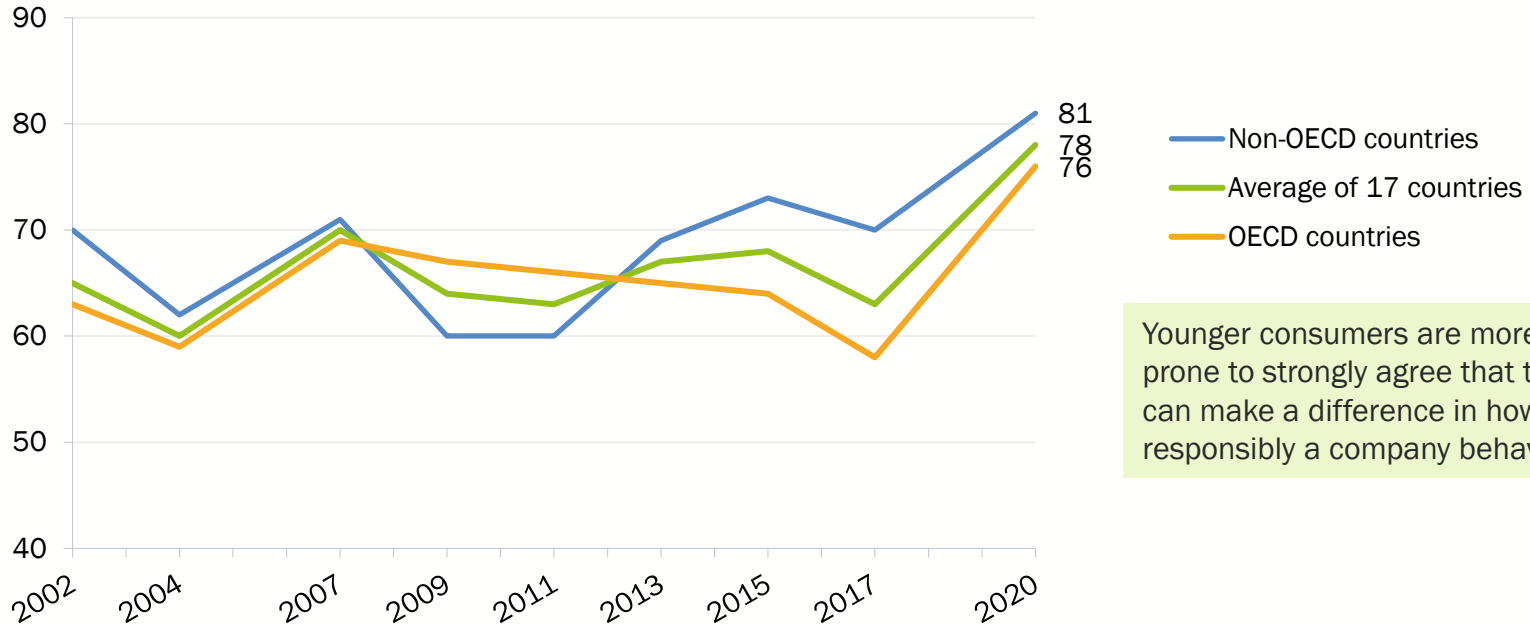
Actions Taken to Make a Difference on Issues, Average of 27 Countries, 2020



T15. In the past year, have you done any of the following to make a difference on an economic, environmental, social, or political issue that you care about? Please select all that apply.

Consumers globally have become increasingly empowered

Consumers Can Make a Difference in How Companies Behave, “Strongly Agree” and “Somewhat Agree,” Average of 19 Countries* and by Economic Development, 2002–2020



Younger consumers are more prone to strongly agree that they can make a difference in how responsibly a company behaves.

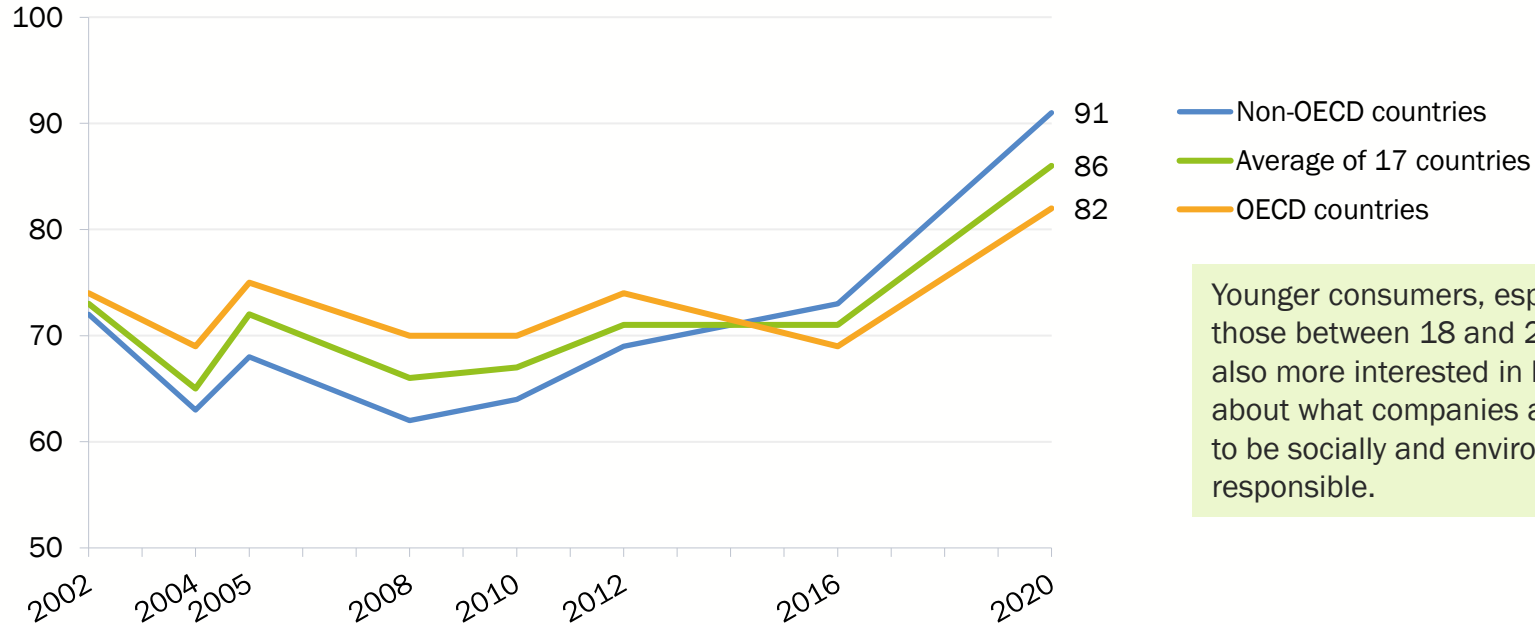
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T13. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. – As a consumer, I can make a difference in how responsibly a company behaves.

Consumers have become more interested in learning about ways companies are being socially/environmentally responsible



Interested in Learning How Companies Are Socially/Environmentally Responsible, “Strongly Agree” and “Somewhat Agree,” Average of 19 Countries* and by Economic Development,** 2002–2020



Younger consumers, especially those between 18 and 24, are also more interested in learning about what companies are doing to be socially and environmentally responsible.

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T13. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

20 – I am very interested in learning more about the ways that some companies are trying to be more socially and environmentally responsible.

Consumers have become more supportive of purposeful companies, particularly in emerging markets but also in OECD countries



I Try to Support Companies/Brands Making a Positive Difference in Society, “Strongly Agree” and “Somewhat Agree,” Average of 17 Countries* and by Economic Development,** 2016 vs 2020



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T13. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.
 – I try to support companies and brands that have a purpose of making a positive difference in society through their products, services and operations.



Shareholders increasingly believe that purpose-driven companies are good investments

Shareholder Views, “Strongly Agree” and “Somewhat Agree,” Subsample: Shareholders, Average of 12 Countries,* 2016 vs 2020



Companies that have a purpose of making a positive difference in society are more profitable



*Includes Brazil, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, UK, and USA

Before 2020 this question was asked using an in-person and telephone methodology.

T22. Please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements.



Panel Discussion

Hosts



Perrine Bouhana
Director
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Speakers



Pia Heidenmark Cook
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