

2015 CONE COMMUNICATIONS/EBIQUITY

# GLOBAL



CSR STUDY



*Corporate social responsibility is more than just a consideration in the shopping aisle.*


*It's now woven into the very fabric of how global consumers lead their lives.*

## CONTENTS

Introduction	2	Country Snapshots	34
Expectations	6	Conclusion	52
Higher CSR Stakes	12	About Cone	54
The Empowered Consumer	16	Cone + Social Responsibility	56
Impact	24	About Ebiquity	60
Communications	28		

### Country Snapshots: Pages 34-51





The 2015 Cone Communications/Ebiquity Global CSR Study reveals one major takeaway for companies: global consumers have officially embraced corporate social responsibility – not only as a universal expectation for companies but as a personal responsibility in their own lives. Consumers see their own power to make an impact in so many ways: the products they buy, the places they work and the sacrifices they are willing to make to address social and environmental issues.

## Today's consumers are savvier than ever when it comes to CSR.

With a growing understanding of corporate impact and a willingness to put their own skin in the game, consumers are primed for participation in CSR efforts. Yet, with this sophistication comes a new pressure for companies to break through and leverage CSR for competitive advantage. Given that most global consumers believe CSR is simply part of doing everyday business, many will only take note if a company goes above and beyond or if it gets called out for wrongdoing. The implications are significant for companies who must now continuously innovate to not only build but protect their reputation.

### *The findings from this study reveal 10 insights for companies looking to effectively engage global citizens in CSR efforts:*

**#1:** Nearly all global consumers expect companies to act responsibly, but half need to hear or see proof of a company's responsibility before they will believe it. To prove these cynics wrong, companies must share CSR efforts and impacts across multiple touch points.

**#2:** Consumers say they pay attention to two things: companies that are going above and beyond with CSR efforts and companies that are being called out for poor CSR performance. Companies can get attention the right way through bold goals and clear, consistent CSR communications.

**#3:** This year's data reveal a decrease in consumer confusion around CSR messages and a surprising grasp of complex CSR terms. But companies should continue to educate and simplify their CSR messages as nearly two-thirds of consumers will ignore messages with social or environmental terms they don't understand.

**#4:** Consumers are willing to make personal sacrifices for the greater good. They are even willing to compromise quality, pay more or reduce how much they buy if it will have a positive impact on social or environmental issues. But companies

shouldn't take this as a signal to cut corners; rather, this is an opportunity to engage consumers more fully in new CSR solutions, collaborating to push the boundaries of responsible consumption and lifestyle.

**#5:** When it comes to purchasing with a cause in mind, consumers say they consistently seek out responsible products, but they are not necessarily following through with action. Companies can help consumers close this gap by not only giving them more opportunities to act, but also through translating how their purchases can create individual impact.



## About the Research:

Cone Communications partnered with Ebiquity to field our third comprehensive survey of global attitudes, perceptions and behaviors around CSR. We conducted an online survey of 9,709 consumers in nine of the largest countries in the world by GDP, including the United States, Canada, Brazil, the United Kingdom, Germany, France, China, India and Japan. We broadly described “corporate social responsibility” to respondents in each country as “companies changing their business practices and giving their support to help address the social and environmental issues the world faces today.”

**#6:** Although only slightly more than a quarter of global consumers feel companies are making a significant impact on issues, this confidence is slowly increasing. To build on this momentum, companies must show proof of progress in terms of individual and collective impact. It's crucial to do this in a way consumers understand, highlighting why the effort is personally relevant through a combination of stories and data.

**#7:** The data have revealed a democratization of communications channels. Once relegated to one or two traditional sources, consumers are now looking to a number of channels to get CSR information, from media and advertising to company websites and social media. Companies can respond by creating surround-sound, always-on communications to deliver CSR messages in ways that resonate.

**#8:** Consumers consistently see social media as an important way to learn, voice their opinions and speak directly to companies around CSR issues, especially in developing countries where usage skyrockets. Companies need to embrace emerging technologies and social channels as effective methods for educating consumers around CSR efforts, creating a dialogue and inspiring them to take action.

**#9:** Only a quarter of global citizens are reading traditional corporate CSR reports, but the data within these reports are still relevant to this audience. Companies have the opportunity to leverage CSR report content in more approachable and dynamic ways and in real-time through infographics, videos and games.

**#10:** Consumers view their role in creating social and environmental change as extending well beyond the cash register. Companies can serve as a catalyst for sparking donations, volunteerism and advocacy by giving consumers a spectrum of ways to get involved. Partnering with consumers in this way can serve as both a reputation and bottom-line builder.

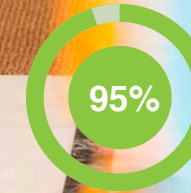




# Expectations

*Today's global consumers see companies as more than just profit-making entities – they think companies have the responsibility and opportunity to make effective social and environmental change.*

Countries most likely to seek out responsible products in the shopping aisle.



**India**



**China**




**Brazil**

Global consumers unequivocally believe companies must operate responsibly to address social and environmental issues. Nine-in-10 (91%) expect companies to do more than make a profit. This unwavering sentiment is consistent with previous years as consumers continue to view the power of companies to collaborate and spearhead change.

In addition to high expectations, consumers also see companies as a conduit to taking accountability in their own lives. Eighty-four percent of global consumers say whenever possible they try to purchase products or services that are socially or environmentally responsible. But their thirst for these products has not yet been satiated. Consistent with 2013 results, nine-in-10 (90%) would like to see more responsible products and services offered from companies. This presents an opportunity for companies to provide consumers with the responsible options they've been clamoring for.





*CSR continues to be a powerful differentiator, not just in the shopping aisle, but in the myriad decisions global consumers make in their everyday lives. When companies clearly articulate their support of social and environmental issues, reputational and bottom-line benefits will follow.*

CSR remains a boon to brand reputation and affinity. In line with 2013 results, global consumers state they have a more positive image (93%), are more likely to trust (90%) and are more loyal to (88%) companies that support social and environmental issues.

Yet, beyond the strong reputational benefits, companies still stand to reap financial rewards through CSR efforts.

Global consumers aren't afraid to vote with their wallets. Given the choice between two products of similar price and quality, consumers consistently look to the product that is associated with social or environmental benefits over one that is not. This inclination to purchase with an eye toward the greater good has remained strong since 2011; however, decisions in the shopping aisle are just one of the many ways consumers show support.

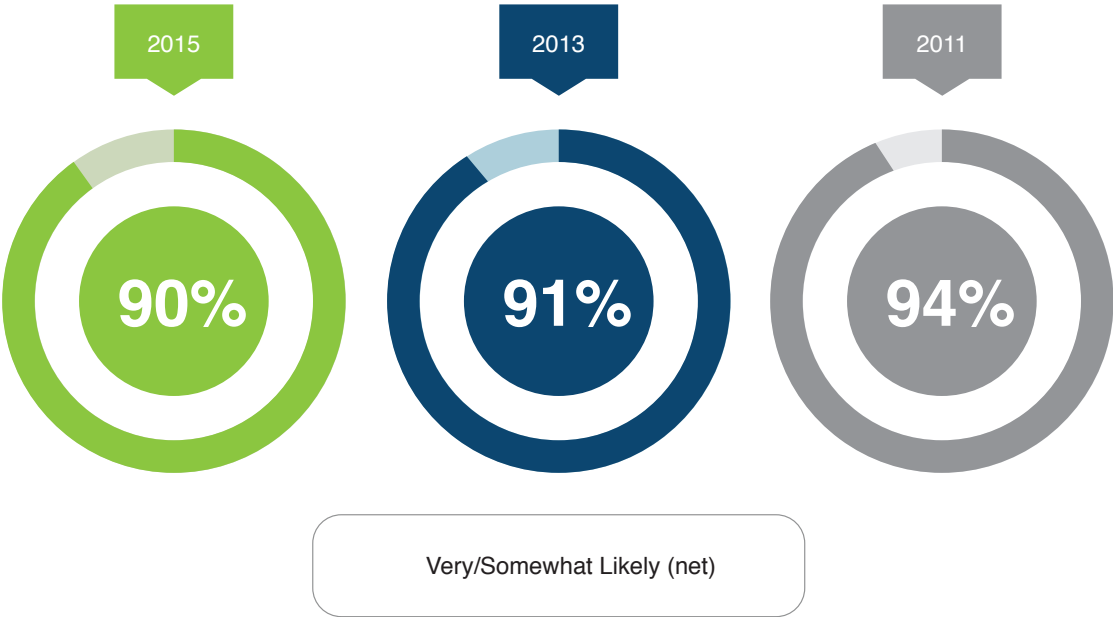
Considering a company's CSR commitments has become the norm when making many important life decisions, and companies shouldn't discount the importance of CSR in recruitment and retention, license to operate and financial attractiveness. Consistent with 2013 results, global consumers consider a company's CSR commitments when they look to which companies they want doing business in their communities (84%), where to seek employment (79%) and what investments to make (67%). As a company's stakeholders become more diverse and the line between consumer, employee, investor and activist becomes increasingly blurred, it is critical to integrate CSR messages to reach and engage beyond the cash register.



of global consumers are likely to switch brands to one associated with a good cause, given comparable price and quality.



Given similar price and quality, consumers are likely to switch brands to one associated with a good cause:



Consumers consider a company's social and environmental commitments before making important decisions.  
Very/Somewhat Important (net)



# Higher CSR Stakes

*Although consumers expect companies to address and report on CSR efforts, actually grabbing consumer attention is not so cut and dried. To break through to this increasingly savvy group, companies must clearly and consistently communicate CSR progress.*

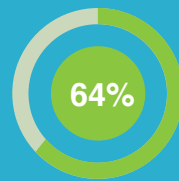


As CSR continues to gain momentum and has even matured in many parts of the globe, consumers are no longer viewing it as an add-on consideration. Rather, CSR is part and parcel to many decisions they make every day. Still, not all consumers will take it for granted that companies are proactively addressing issues. The research reveals a split in how consumers perceive companies' responsibility. Although nearly half (48%) view companies with blind optimism, believing companies are striving to be as responsible as possible unless they hear otherwise, slightly more (52%) assume a company is not acting responsibly until they see or hear evidence to prove otherwise. This only further demonstrates that companies should not take anything for granted. Organizations must put key CSR efforts front and center through communication, or else more than half of consumers globally will assume the worst.

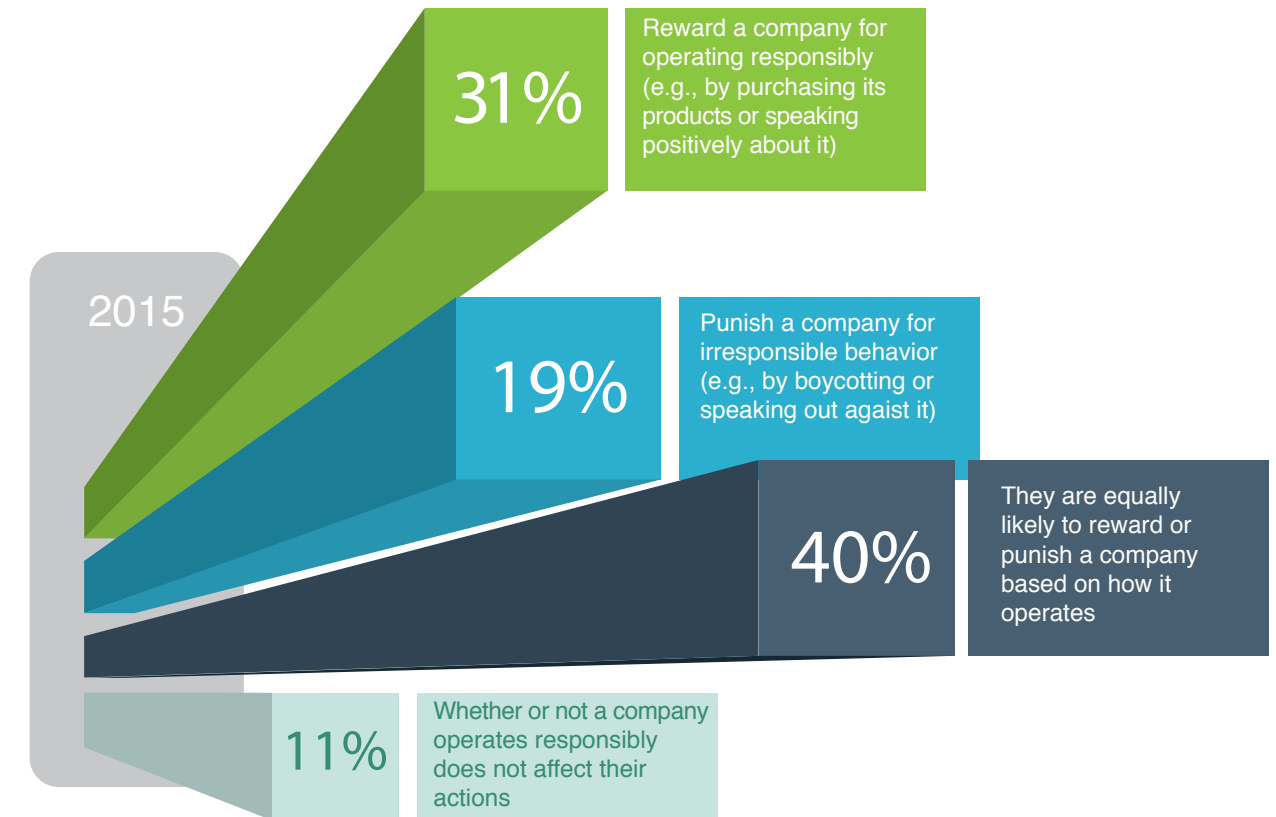




*Consumers will reward or punish based on companies' CSR efforts and operations.*



Simply keeping up with the pack won't be enough. Two-thirds (64%) of global consumers say they only pay attention to company CSR efforts if an organization is going above and beyond what other companies are doing. Meanwhile, half state they won't notice CSR efforts unless a company is called out for wrongdoing. Clearly actions speak louder than words. Consumers stand ready to dole out commendations or castigations to show support for or dissent from company actions. Forty percent of global consumers say they are just as likely to reward a company for operating responsibly as punish it for wrongdoing. Companies must act, innovate and communicate often to break through and grab the attention of today's increasingly astute consumer.



# The Empowered Consumer

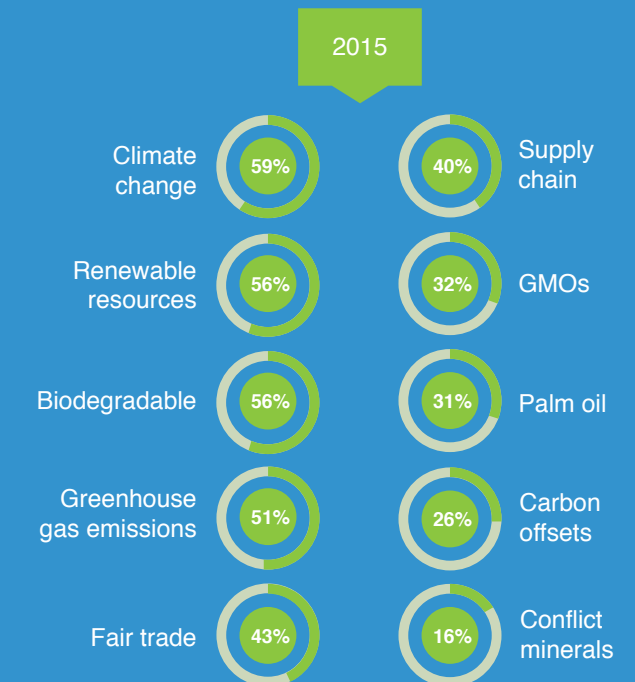
*Around the world, consumers are more informed and empowered than ever before – feeling a greater sense of personal impact through their purchasing decisions, but also through their ability to make sacrifices in their own lives to amplify social and environmental change.*

*Consumers believe their purchases make a moderate-to-significant impact.*

72%

With CSR firmly grounded in many global citizens' daily routines and considerations, consumers have a better understanding and are more optimistic overall about their own ability to make a positive impact. In fact, nearly three-quarters (72%) believe their purchases make a moderate-to-significant impact on social and environmental issues. This outlook may stem from a greater understanding of CSR terms and language. Consumer confusion of company CSR messages has dropped, from 71 percent in 2011 to 65 percent in 2015.

Consumer familiarity with social and environmental terms\*:



\*Summary of "I could easily define this term and provide examples"



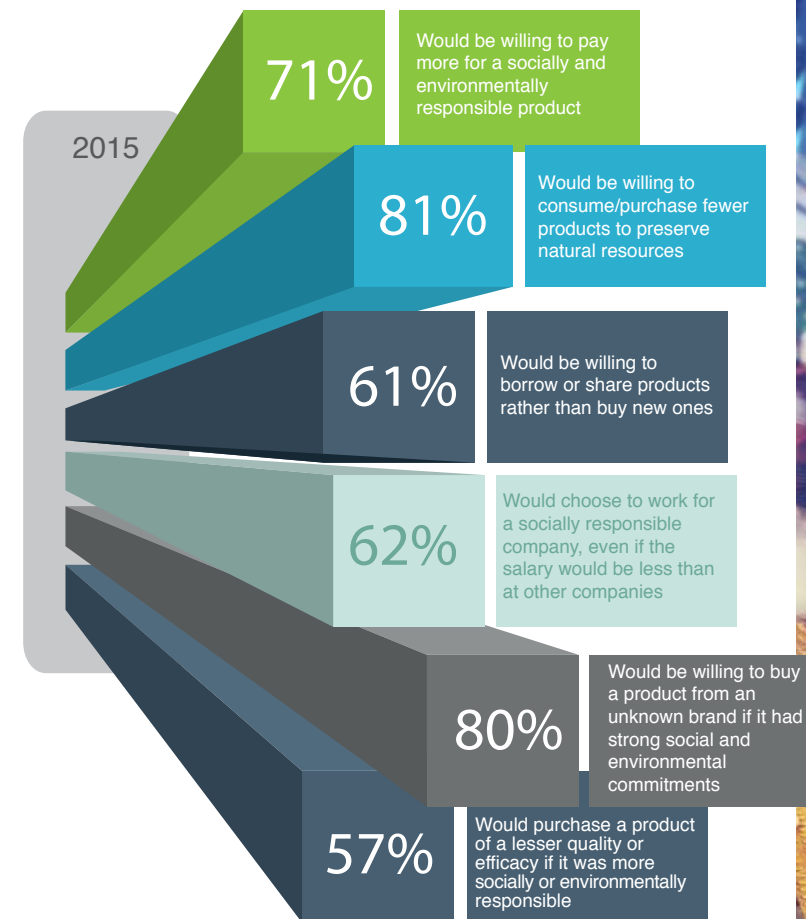


With a broader understanding of the CSR landscape, consumers are also ready to take on significant personal responsibility, triggering change through conscious decisions in their own lives. Citizens globally say they would be willing to consume or purchase fewer products (81%), buy a product from an unknown brand with stronger social or environmental commitments (80%) or pay more for a responsible product (71%) to address social or environmental issues.

Beyond purchasing behaviors, more than three-fifths would take a pay cut to work for a more responsible company (62%) or eschew ownership altogether by borrowing or sharing products (61%). Consumers are so convicted in their need to do their part that more than half (57%) would purchase a product with lesser quality if it was better for the environment or society.

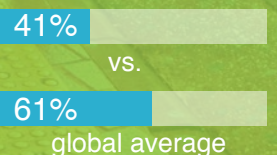
These actions - and a willingness to sacrifice cash, quality and convenience - signal a growing understanding about their role in making a meaningful impact. Although this doesn't mean companies should raise prices or compromise efficacy, it does mean consumers are willing to get outside their comfort zones by thinking differently and taking more risks in the types of products and companies they support.

## Consumer likelihood to personally address social or environmental issues: Very/Somewhat Likely (net)



### Sharing economy standstill:

Consumers in Japan are least likely among the countries surveyed to share or borrow products rather than buy.



*Consumers want to get engaged with corporate social responsibility efforts:*  
*Strongly/Somewhat Agree (net)*

If I learned of a company's irresponsible or deceptive business practices, I would stop buying its products

90%

If given the opportunity, I would buy a product with a social or environmental benefit

89%

I would tell my friends and family about a company's CSR efforts

80%

If given the opportunity, I would donate to a charity supported by a company I trust

76%

If given the opportunity, I would volunteer for a cause that a company I trust supports

72%

If given the opportunity, I would voice my opinion to a company about its corporate social responsibility efforts (e.g., provide comments on the company's website or blog; review products)

72%

*In the past 12 months, consumers indicate they have:*

Boycotted (refused to purchase) a company's products/services upon learning it behaved irresponsibly

53%

Bought a product with a social and/or environmental benefit

63%

Told friends or family about a company's corporate social responsibility efforts

47%

Made a donation

61%

Volunteered

40%

Given their opinions and feedback about a company's responsibility efforts directly to that company

34%

Researched a company's business practices or support of social and environmental issues

37%



As consumers are feeling more vested in making a difference, companies should continue to provide a spectrum of ways to engage for greater impact. Across the board, global citizens stand ready to support or punish a company based on its CSR efforts. The leading ways consumers want to get engaged are actions tied directly to their wallets, with nine-in-10 just as likely to purchase (89%) as to boycott (90%). But they are also seeking ways to get engaged beyond the cash register and would like to partner with companies to donate (76%), volunteer (72%) or directly participate in a dialogue (72%).

Despite their good intentions, there remains a persistent gap between intent and reported behaviors. The most frequent actions taken over the last 12 months include having purchased a product with a social or environmental benefit (63%) or making a donation (61%), which are not surprising given both are the more common ways companies currently engage consumers. Despite shopping leading the way, there appears to be a decline over time in reported purchases of products with a CSR benefit – from 77 percent in 2011 to 63 percent in 2015. The research indicates this decline may have less to do with consumers’ enthusiasm for responsible products and more about their inability to find such products. Although consumers say they proactively seek responsible products every time they shop (84%), they also cite unavailability of products as the primary barrier preventing them from purchasing more (81%).

To narrow the gap and overcome this barrier, companies have the opportunity to provide consumers with more responsible product options, making it easier for individuals to follow through on intended action and purchase with their values in mind. This opportunity for companies extends beyond products. Consumers show a willingness to engage in myriad ways, from volunteering to giving feedback about CSR activities. Companies must respond by providing a spectrum of turnkey solutions for consumers to participate in CSR efforts.

Why the drop in responsible purchasing? Although most consumers proactively seek out responsible products every time they shop, they also cite the lack of availability of these products as the biggest barrier to purchase.

84%

Seek out responsible products

81%

Availability barrier

# Impact

*It's not enough to make CSR commitments – today's global consumers hold companies accountable for producing and communicating results.*

Consistently high expectations mean consumers are holding companies to an even higher standard when it comes to reporting on CSR efforts. Nearly nine-in-10 (88%) expect companies to report on the progress of their CSR efforts, and nearly as many (86%) say if a company makes CSR commitments, it should be accountable for producing and communicating results. Yet, it is clear there is still more work ahead for companies to effectively communicate impacts on a shared and personal level.

Just over a quarter (27%) of consumers across the globe say companies have made a significant impact on social or environmental issues. Despite the low vote of confidence, this year's data may signal a positive upswing, given a six percentage point increase from 21 percent in 2013. Perceived corporate impact continues to remain strong in developing countries such as India (48%), China (36%) and Brazil (36%) where issues may be felt more acutely and companies have had a greater ability to facilitate improvements.

In line with perceived corporate impact, nearly a third (29%) of consumers believe they can have a significant positive impact through purchases. Here, we see a marked difference among countries. Although citizens of Brazil (55%) and India (56%) are more likely to feel their purchases ladder up to a significant impact on issues, residents of the United Kingdom (14%) and Japan (18%) are notably more pessimistic. As consumers go above and beyond to do their part in addressing issues, there is more pressure on companies to show how these efforts are not in vain. Sharing both corporate and individual impact will further empower consumers to take action.

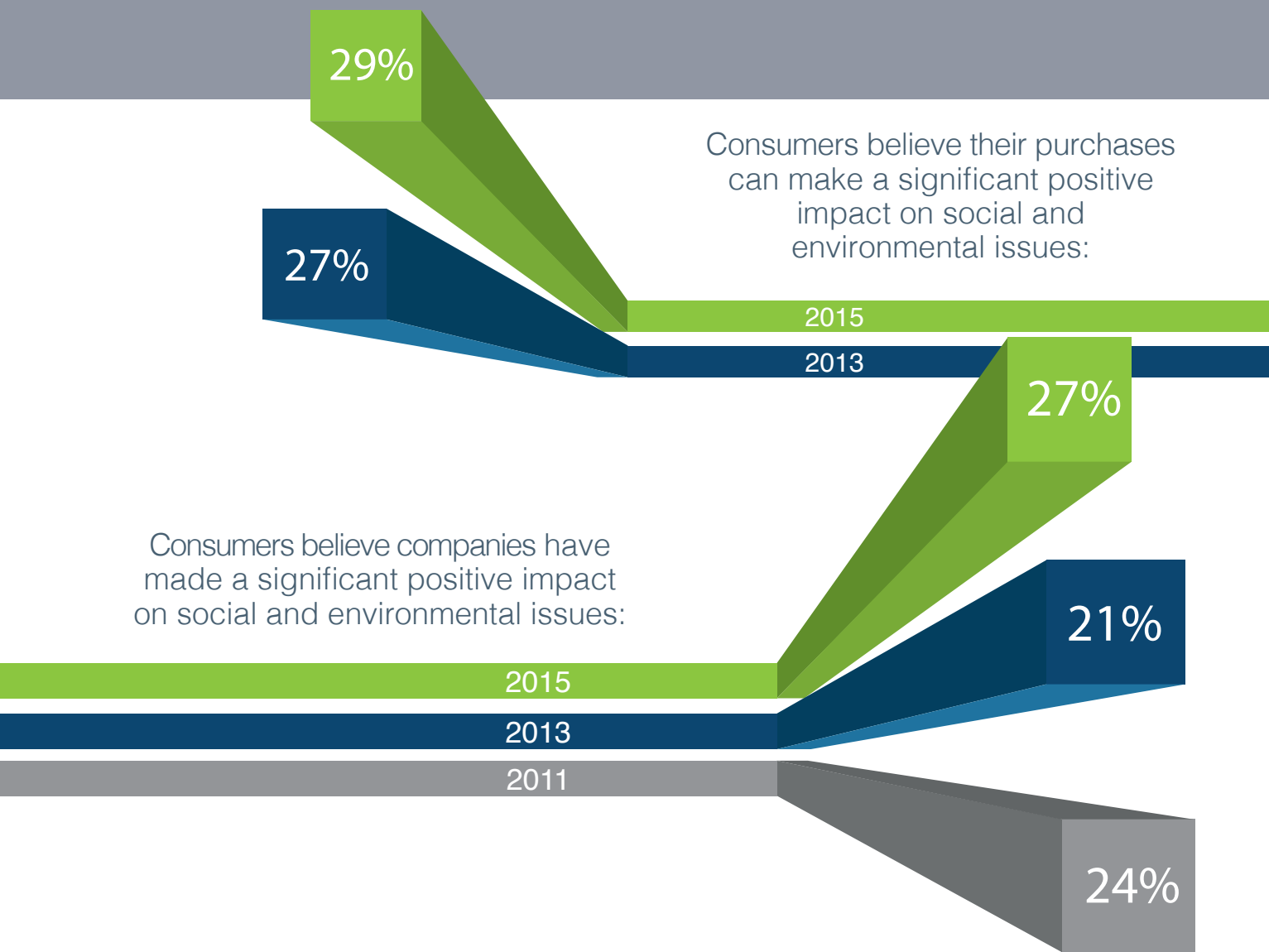


of citizens in India have read a CSR report in the past 12 months - more than twice as many as the global average (25%)





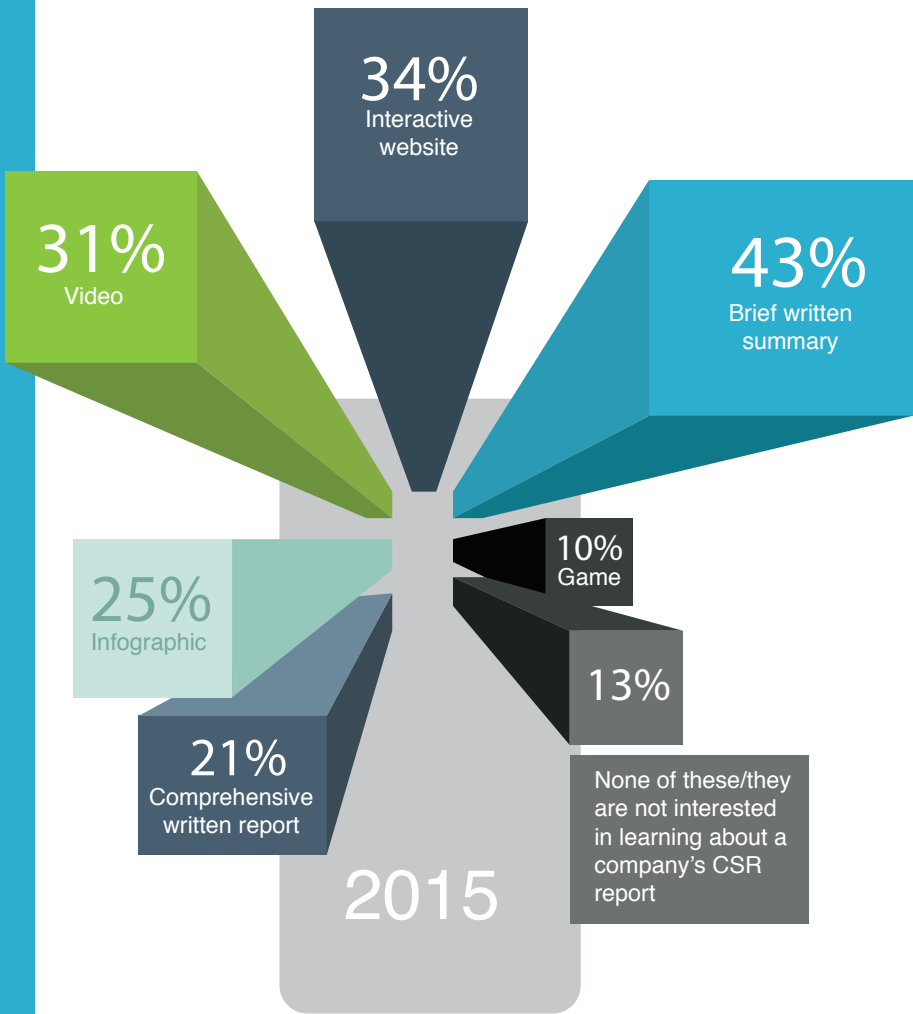
# Perceived corporate and consumer impact:



The low levels of observed impact reinforce the need for companies to not only communicate progress on CSR efforts, but also make sure the information is in the right format and channel. Too often, companies rely on annual CSR reports to communicate progress against goals, yet, just a quarter of global consumers state they have read a company CSR report in the past 12 months. To break through, companies must present this information in formats that resonate with specific audiences.

Globally, two-in-five (43%) consumers prefer to digest CSR goals, progress and programs as brief written summaries, followed by interactive websites (34%) and videos (31%); however, marked nuances exist among populations. Citizens in China (52%) and Japan (43%) are more likely to prefer infographics, while consumers in Brazil (47%) and India (46%) would like to see information on CSR progress in the form of a video.

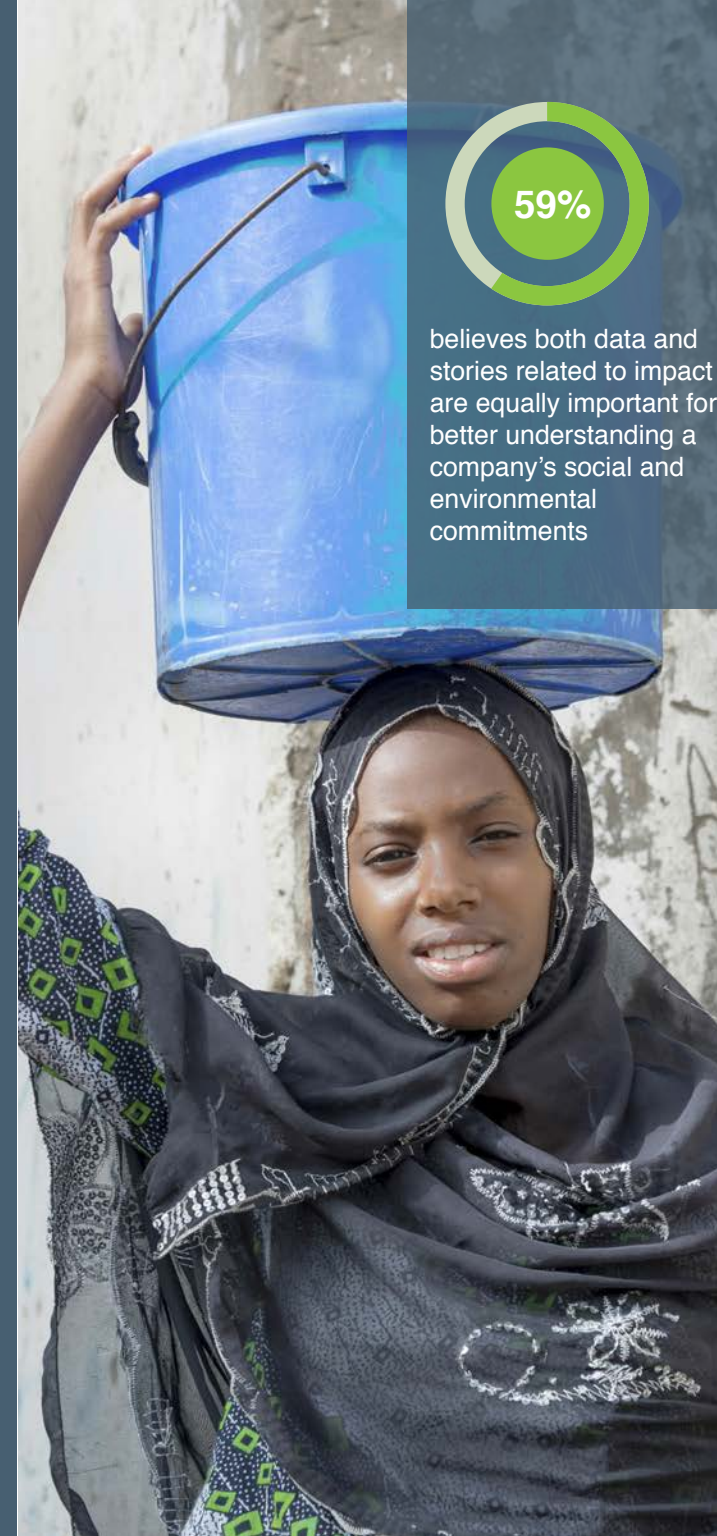
Consumers prefer to see information from a company CSR report in the form of:



# Communications:

## Creating a CSR Experience

*Although global citizens continue to expect companies to communicate proof of progress on CSR efforts, they are particular about how that information is conveyed. They seek CSR content that is personally relevant – balancing data with stories of impact – in channels that are easily accessible and customized per audience.*



believes both data and stories related to impact are equally important for better understanding a company's social and environmental commitments

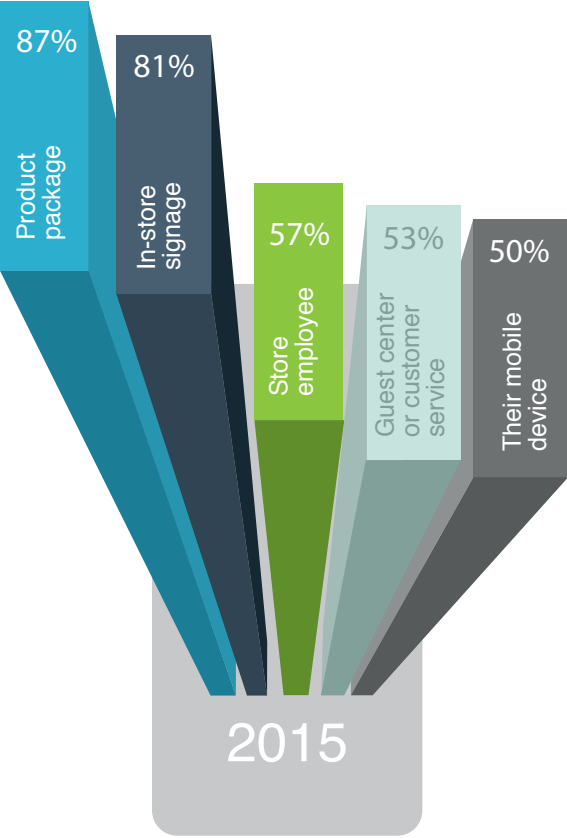
Nearly nine-in-10 (88%) global consumers want companies to tell them what they are doing to operate responsibly and support important issues. But this sophisticated group also understands CSR is often-times a journey with challenges and barriers along the way. Eighty-seven percent say it's okay if a company is not perfect as long as it is honest about CSR efforts. Consumers may be forgiving of imperfection, but they believe there is room for improvement in how CSR information is shared.

Blanket messages on CSR progress won't cut it for global consumers, with 89 percent of consumers stating companies need to do a better job in showing how corporate social and environmental efforts are personally relevant. Despite their increased understanding of CSR messages, nearly two-thirds (64%) state they will ignore messages that are relayed in terms they don't understand. For companies to stand out, it's critical to always strive to distill complex CSR goals, strategies and data into bite-sized, meaningful content to which consumers can relate.



Consumers are likely to use in-store resources to learn about CSR commitments and impacts:

Very/Somewhat Likely (net)



As the communications landscape continues to become more diverse, companies must take an integrated approach to conveying CSR messages. Consumers still prefer to seek CSR information through traditional channels, but that may not be the case for long. Product package (19%), media (15%) and advertising (14%) remain the most effective ways to reach consumers, but social media and mobile channels combined continue to gain traction, nearly doubling from 10 percent in 2011 to 18 percent in 2015.

The most effective communication channels for information about social and environmental programs and products:





Social media is also giving consumers access to information at an unprecedented pace – and citizens feel empowered to take to their personal channels to learn and voice their opinions, both positive and negative. Consistent with 2013 results, three-in-five (61%) global consumers report using social media to address or engage with companies around social and environmental issues.

Fortunately, most citizens are using social media to the benefit of companies – to share positive information about companies or issues (34%) or to learn more about topics they care about (30%); however, companies must not ignore the quarter of consumers (25%) who are using social media to disseminate negative information about companies and issues.

Social media usage skyrockets in developing countries and companies should look to these channels as a way to not just communicate, but engage in a dialogue, as citizens in India (35%) and China (27%) are seeking to communicate directly with companies around issues.

# How consumers use social media to address and/or engage with companies around social and environmental issues:







COUNTRY SNAPSHOT

# United States

In lock step with the global average, Americans have high expectations for companies to do more than make a profit (87% vs. 91% global average). CSR also remains a key driver of enhanced reputation and favorability among U.S. citizens. Americans say when a company supports social or environmental issues, they have a more positive image (91%), more trust (87%) and more loyalty (87%) toward that business.

Americans also mirror the global average when considering a company's CSR commitments in making a number of important decisions, including which companies they want doing business in their communities (84% vs. 84% global average), what to buy or where to shop (80% vs. 84% global average) and which products and services to recommend to others (78% vs. 82% global average). This group is even above average in supporting social and environmental issues in more traditional ways, such as making donations (69% vs. 61% global average) or volunteering (47% vs. 40% global average) in the last 12 months. Yet as CSR matures in the United States, consumers in turn are looking for deeper forms of engagement from companies, especially beyond the register.

The data do reveal a reduction in American consumers' reported purchase of products with social or environmental benefits (56% in 2015 vs. 72% in 2011), despite the nine-in-10 who state they'd switch brands to support a cause (91%) and want to see more products available that address social or environmental issues (89%). However, companies should not see this shift as a negative, but a signal that Americans are seeking even broader forms of engagement. This population reflects

the global average in its willingness to participate in efforts if companies provide them with the opportunities – from volunteering (70% vs. 72% global average) to donating (79% vs. 76% global average) to voicing their own opinions directly to companies (69% vs. 72% global average). And companies should view their role as a catalyst to driving consumers to action, as Americans are less apt to make sacrifices in their own lifestyles, such as borrow rather than buy (56% vs. 61% global average), purchase a product of lesser quality (49% vs. 57% global average) or take a pay cut to work for a socially responsible company (56% vs. 62% global average).

Although previously more cynical, Americans are beginning to see the positive impacts of CSR efforts, with more believing companies have made a significant positive impact today than in previous years (23% in 2015 vs. 16% in 2013 and 2011). This increase in perceived corporate impact could be due to Americans' deeper understanding of CSR messages. They continue to be less likely to find CSR communications confusing (58% in 2015 vs. 65% in 2011). More in alignment with the global average, they also have a strong knowledge of many frequently used CSR terms, such as "greenhouse gas emissions" (48% vs. 51% global average), "climate change" (60% vs. 59% global average) and "renewable resources" (56% vs. 56% global average).

## IMPLICATION FOR COMPANIES:

Since CSR in the U.S. is as much about building and protecting reputation as driving sales, companies must integrate CSR efforts into their entire brand experience. Americans also see companies as key to their participation in addressing social and environmental efforts, as they are less likely to make these changes directly in their own lives. Therefore, companies should look to new opportunities to engage this group and serve as a catalyst for change both at and beyond the cash register.

## Five Defining Insights

Trust and Favorability	Likely to have a positive image (91% vs. 93% global average) and willing to trust (87% vs. 90% global average) and be loyal (87% vs. 88% global average) when a company supports a social or environmental issue
Confusion Over CSR Messages	Likelihood to find CSR communications confusing has decreased (58% in 2015 vs. 65% in 2011)
Perception of Corporate Impact	Perceived significant corporate impact increased (23% in 2015 vs. 16% in 2013 and 2011)
Reported Behavior	More likely to have made donations (69% vs. 61% global average) or volunteered (47% vs. 40% global average) in the last 12 months
Willingness to Make Personal Sacrifices	Less apt to borrow rather than buy (56% vs. 61% global average), take a pay cut to work for a socially responsible company (56% vs. 62% global average) or purchase a product of lesser quality (49% vs. 57% global average)





## COUNTRY SNAPSHOT Canada

Consistent with previous years, Canadian citizens' beliefs about company involvement in social and environmental issues strongly align with the global average, signaling a middling approach to CSR. Yet, nuances in the data reveal the unique qualities of the Canadian outlook.

Canadians have high expectations of companies to be responsible and consider CSR commitments when making a variety of decisions. They have a solid understanding of the messages companies use to talk about efforts and a stronger than average understanding of CSR terms. However, this group seems to be less vocal over the past several years as their propensity to voice opinions directly to companies continues to decline (66% vs. 72% global average, with a steady decrease from 75% in 2011). But don't mistake this drop as lack of interest to engage. Canadian citizens aren't afraid to show their approval of or dissatisfaction with company CSR behavior in other ways. Judiciously, Canada is the country most likely to dole out rewards or punishments in equal measure based on company actions (50% vs. 40% global average).

Although Canadian citizens are keeping a keen eye on companies, they are not directly feeling the impact of CSR efforts. In fact, nine-in-10 (89%) believe companies could do a better job showing how efforts are relevant

to them. Canadians are also one of the more cynical groups, second only to the United Kingdom, in believing companies have made a significant impact on issues (19% vs. 27% global average). Despite seeking out responsible products whenever possible, they are less apt to believe their own purchases make a significant impact (22% vs. 29% global average).

Canadian citizens show enthusiasm for making a difference in other, more personal ways. This is one of the most likely countries to have donated (70% vs. 61% global average) and volunteered (46% vs. 40% global average) in the past 12 months, and people stand ready to make personal sacrifices to address social or environmental issues, such as their readiness to consume less to protect natural resources (82% vs. 81% global average). One area where they are not willing to concede is quality, as Canadians are less likely than their global counterparts to compromise the quality of the products they buy for the greater good (50% vs. 57% global average).

### IMPLICATION FOR COMPANIES:

Although Canadian citizens are putting their own skin in the game to address social or environmental issues, they are less likely to see the impact from company efforts or how their purchases translate into CSR progress. To reach this audience, companies must help them understand how CSR commitments are relevant to their everyday lives and Canadian consumers will reward through product purchase, speaking positively about efforts and taking accountability in their own lives.

### Five Defining Insights

Perception of Individual Impact	Less apt to believe their own purchases make a significant impact (22% vs. 29% global average)
Perception of Corporate Impact	Less likely to see a significant corporate impact on issues (19% vs. 27% global average)
Reported Behavior	One of the most likely countries to have donated (70% vs. 61% global average) and volunteered (46% vs. 40% global average) in the past 12 months; significant decrease in reported purchase (59% vs. 79% in 2011)
Willingness to Participate	Less likely to voice opinions directly to companies (66% vs. 72% global average, decreased from 75% in 2011)
Reward vs. Punish	Most likely to equally reward and punish companies for their CSR efforts (50% vs. 40% global average)





## COUNTRY SNAPSHOT

# Brazil

Brazilian citizens remain steadfast in both their expectations and enthusiasm for company CSR efforts. This group is near unanimous in its desire for companies to go beyond simply making a profit for shareholders but also expects companies to operate responsibly to address issues (96% vs. 91% global average). These high expectations mean Brazilians are holding companies to even higher standards. More than any other country surveyed, eight-in-10 Brazilians say they would only pay attention to CSR efforts if a company goes above and beyond what others are doing (82% vs. 64% global average).

Well above other citizens, Brazilian consumers consider a company's CSR commitments as an important factor when making decisions such as which products to recommend (94% vs. 82% global average), where to work (93% vs. 79% global average) and which companies they want to see doing business in their communities (93% vs. 84% global average). This group is also more likely than the global average to switch brands to one associated with a cause (96% vs. 90% global average) and to feel the impact of those purchases, with more than half of Brazilian citizens believing their purchases can make a significant impact (55% vs. 29% global average).

Brazilians' enthusiasm for CSR extends to their individual responsibility and personal actions. This group is more willing than any other country surveyed to make changes in their everyday lives and make sacrifices for the greater good, such as purchasing a product of lesser quality (81% vs. 57% global average) or taking a pay cut to work for a socially responsibly company (82% vs. 62% global average).

Despite their unbridled eagerness, Brazilians remain bewildered by company CSR terms and communications. Although this confusion has decreased from 81 percent in 2011 to 77 percent in 2015, Brazilians are still the most confused of all countries surveyed, with major implications. Brazilian citizens are also more likely to disregard information that is not put in clear and straightforward terms – with seven-in-10 (70%) ignoring messages they don't understand.

### IMPLICATION FOR COMPANIES:

Brazilian consumers lead the pack in participating in company CSR efforts and demonstrate a personal passion for addressing social and environmental issues in their own lives; however, it can be even harder for companies to stand out with this group. Companies must first help this audience better understand CSR terminology and then stand out by going above and beyond the expected.

## Five Defining Insights

Role of Business	Most likely to believe role of business is to do more than make a profit, but to operate responsibly (96% vs. 91% global average)
Consider CSR in Decisions	Considers CSR when deciding which products to recommend (94% vs. 82% global average), where to work (93% vs. 79% global average) and which companies they want doing business in their communities (93% vs. 84% global average)
Use of Social Media	More likely to engage using social media (84% vs. 61% global average)
Confusion Over CSR Messages	Decreased confusion (77% in 2015 vs. 81% in 2011), but still most confused country (vs. 65% global average)
Communications Actions	More likely to ignore CSR messages they don't understand (70% vs. 64% global average)





COUNTRY SNAPSHOT

China

Alongside the developing nations of Brazil and India, China is highest in terms of its enthusiasm and regard for company CSR efforts. The Chinese maintain lofty expectations for companies to address social and environmental issues beyond the shareholder wallet (96% vs. 91% global average), report on progress (96% vs. 88% global average) and hold companies to a higher standard to produce results (92% vs. 86% global average). Chinese consumers are also inherently optimistic. This group is more likely to assume companies are striving to be as responsible as possible (61% vs. 48% global average).

Although Chinese consumers are resolute in their expectations of companies, they understand companies can't go it alone. This population is more willing to be engaged in addressing social or environmental issues, considering company CSR commitments when making everyday decisions and instituting changes in their own lives. Not surprisingly, Chinese consumers are more willing to participate in CSR efforts across the board, from buying (94% vs. 89% global average) to volunteering (91% vs. 72% global average). They are also more likely to actually follow through on intended actions such as telling friends and family about company CSR efforts (74% vs. 47% global average) or giving opinions directly to companies (49% vs. 34% global average).

More than any other country, Chinese citizens see social media as the go-to resource for learning and engaging with companies around CSR commitments (89% vs. 61% global average). Most Chinese consumers are using it to share information, both positive (59% vs. 34% global average) and negative (46% vs. 25% global average). It's therefore no wonder social media has exploded as the most effective channel in China for conveying information about CSR efforts (18% in 2015 vs. 10% in 2011), surpassing traditional media (15% in 2015 vs. 24% in 2011) in this year's data.

IMPLICATION FOR COMPANIES:

Chinese consumers view companies as a key player in addressing social and environmental issues, and hold them to a high standard to communicate and report on impact; however, they also are ready to participate alongside companies in CSR initiatives in addition to making sacrifices in their own lives. Social media is an absolute staple when looking to engage this tech-smart audience, and companies must not neglect the power this channel can hold.

Five Defining Insights

Role of Business	Most likely to believe role of business is to do more than make a profit, but to operate responsibly (96% vs. 91% global average)
Willingness to Participate	More likely to want to buy (94% vs. 89% global average), volunteer (91% vs. 72% global average) and donate (87% vs. 76% global average)
Use of Social Media	Most likely to engage using social media (89% vs. 61% global average)
Desired Communications Channels	Social media (18%), Traditional media (15%), Company website (14%)
CSR Assumptions	More likely to assume companies are striving to be as responsible as possible (61% vs. 48% global average)





COUNTRY SNAPSHOT

India

Indian consumers are unwavering in their enthusiasm and optimism for company CSR efforts. This group is more likely than the global population to consider, participate in and encourage CSR. This fervor is perhaps because Indian consumers are truly feeling the impact of companies’ work to address social and environmental issues, and they also see the power of their own individual efforts to drive change. Indians are the most likely consumer group to believe their purchases are making a significant difference (56% vs. 29% global average) and are by far more likely than any country surveyed to say they believe companies have made a significant impact (48% vs. 27% global average). Their optimism toward perceived company impact has steadily climbed over the last five years – increasing eight percentage points from 2011.

This sense of empowerment to serve as an agent of change is reflected in their near-unanimous intent to seek out responsible products whenever possible (95% vs. 84% global average). Indian consumers are also the most likely to follow through on their ambitions to purchase responsibly. Ninety-six percent say they would buy these products if they had the opportunity (vs. 89% global average), and eight-in-10 Indian consumers say they are walking the talk with actual purchases (vs. 63% global average).

To close the intent-to-action gap even further, companies need to provide more options. Second only to Chinese citizens, Indians say they would like to see more products and services they use support social or environmental issues (96% vs. 90% global average). Like their global counterparts, they see availability of such products as a major barrier to purchase (77% vs. 81% global average).

This keen group is taking to mobile devices, tablets and laptops, using social media to learn (49% vs. 30% global average) and share (58% vs. 34% global average) positive CSR information. Indian consumers fall just behind their Chinese counterparts in their fervent use of social media to engage with companies and issues (88% vs. 61% global average). Social media has also taken the top spot alongside advertising as the most effective channel for delivering CSR information in India, increasing from 11 percent in 2011 to 17 percent in 2015 and usurping on-pack information (11% in 2015 vs. 17% in 2011).

IMPLICATION FOR COMPANIES:

Indian consumers are looking to partner with companies to make progress, and their belief that their personal actions combined with company efforts can make a difference is at the crux of their enthusiasm. Companies should provide this audience with even more ways to engage both online and offline and ensure that Indian citizens have the opportunity to use their purchasing power to support CSR efforts.

Five Defining Insights

Perception of Individual Impact	Most likely to believe their own purchases make a significant impact (56% vs. 29% global average)
Perception of Corporate Impact	Most likely to believe companies have made a significant impact (48% vs. 27% global average)
Use of Social Media	More likely to engage using social media (88% vs. 61% global average)
Demand for Products	More likely to want to see more products and services they use support social or environmental issues (96% vs. 90% global average)
Willingness to Seek Out Products	More likely to seek out responsible products whenever possible (95% vs. 84% global average)



## COUNTRY SNAPSHOT

# United Kingdom

In the United Kingdom, CSR may be more of a reputation builder and protector than a differentiator at the cash register. Although U.K. citizens have high expectations of companies to do more than make a profit, they are also one of the more cynical and least engaged audiences.

Many U.K. citizens view companies with skepticism, as they are more likely than the global average to say they don't believe companies are striving to be as responsible as possible until they hear about positive efforts (57% vs. 52% global average). This may explain why consumers in the U.K. are less apt to view themselves as a partner in addressing social and environmental issues alongside companies. Across the board, U.K. citizens say they are less likely to participate in company CSR efforts if given the opportunity, and reported actions mirror this group's apathetic inclinations. One exception to this rule is U.K. citizens' enthusiasm for donating to a charity supported by a company, with 70 percent reporting they have made such a donation in the past 12 months (vs. 61% global average).

The propensity of U.K. consumers to make donations may be because they are less likely to recognize an impact from making purchases. Only 14 percent believe their individual purchases are having a significant impact on social and environmental issues, the lowest among all countries surveyed (vs. 29% global average). It also comes as no surprise they are also the least likely to say they believe companies have made a significant impact (15% vs. 27% global average).

With such an incredulous view of company impact, it's to be expected that U.K. citizens are also the most prone to ignore CSR messages until something goes wrong (59% vs. 50% global average). And companies need to be crystal clear in communications as U.K. citizens are more apt to say they are confused by CSR messages (71% vs. 65% global average), despite having a better understanding than most of their global counterparts on CSR terminology. This lack of confidence should be a red flag for companies as they are significantly more likely to tune out messages they say they don't understand (72% vs. 64% global average).

## IMPLICATION FOR COMPANIES:

This cynical audience puts the burden of proof squarely on companies. They already have a firm grasp on CSR terminology; it's now up to companies to communicate in a way that gives consumers the confidence to internalize CSR messages. In addition, if companies want U.K. citizens to participate beyond making donations, they must show this group not only how their purchases and actions can ladder up to impact but also how companies are making an impact independent of consumer participation.

## Five Defining Insights

Perception of Individual Impact	Least likely to believe their purchases make a significant impact (14% vs. 29% global average)
Perception of Corporate Impact	Least likely to believe companies have made a significant impact (15% vs. 27% global average)
CSR Assumptions	More likely to say they don't believe companies are striving to be as responsible as possible until they hear about positive efforts (57% vs. 52% global average)
Confusion Over CSR Messages	More likely to be confused by CSR messages (71% vs. 65% global average)
Communications Actions	Significantly more likely to tune out messages they say they don't understand (72% vs. 64% global average)





## COUNTRY SNAPSHOT France

French citizens remain unwavering in their high expectations of companies over the last four years. Yet, this population is also decidedly skeptical of CSR efforts.

In lock step with the global average, French citizens expect companies to operate responsibly to address social and environmental issues, rather than simply make a profit (92% vs. 91% global average). This group also falls within the global average in its expectations for companies to report progress of CSR efforts (89% vs. 88% global average); however, French consumers generally start from a place of distrust. Among all their global counterparts, the French are the most likely to say they don't believe companies are striving to be as responsible as possible until they hear information about companies' positive commitments and efforts (69% vs. 52% global average). They are also among the highest to say they don't pay attention to a company's CSR efforts until something goes wrong (54% vs. 50% global average).

Reaching French consumers with clear and straightforward communications is critical. Despite their reported higher than average understanding of most CSR terms, they are among the most likely to say they are confused by CSR messages (73% vs. 65% global average). This lack of confidence comes with significant consequences,

as this group is the most likely to ignore messages altogether if they don't understand the terms or words used (73% vs. 64% global average).

French consumers believe there's work to be done in not only communicating efforts effectively, but showing how CSR efforts impact their everyday lives. The French are among the most likely to believe companies need to do a better job showing how their social and environmental efforts are personally relevant (94% vs. 89% global average).

Their distrust and confusion may be one of the reasons French consumers are less likely to actively participate in corporate-led efforts. Across the board, reported actions lag behind the global average with French citizens less likely to have bought a product associated with a cause (57% vs. 63% global average), made a donation (54% vs. 61% global average) or told friends and family about CSR efforts (40% vs. 47% global average).

### IMPLICATION FOR COMPANIES:

French consumers, while retaining high expectations of companies, also have a dangerous combination of distrust and confusion around CSR efforts. To win the attention of this critical group, companies must be prepared to explain the individual and business impacts of their CSR efforts, giving equal weight to the personal stories and metrics behind programs, all while educating French consumers on frequently used terminology.

### Five Defining Insights

Reported Actions	Less likely to have bought a product associated with a cause (57% vs. 63% global average), made a donation (54% vs. 61% global average) or told friends and family about CSR efforts (40% vs. 47% global average)
Role of Business	Believes role of business is to do more than make a profit, but to operate responsibly (92% vs. 91% global average)
CSR Assumptions	Most likely to say they don't believe companies are striving to be as responsible as possible until they hear about positive efforts (69% vs. 52% global average)
Confusion Over CSR Messages	Most likely to be confused by CSR messages (73% vs. 65% global average)
Communications Actions	Most likely to tune out messages they say they don't understand (73% vs. 64% global average)



COUNTRY SNAPSHOT

# Germany

With CSR firmly entrenched in German culture, German citizens put responsibility squarely on companies to make social and environmental progress. This group is in direct alignment with the global average in believing companies should do more than make a profit, but also must address social and environmental issues (91% vs. 91% global average).

This audience is also among the least likely to be confused by the messages companies use to talk about CSR efforts (52% vs. 65% global average). They have a very strong working knowledge of many commonly used CSR terms, such as “renewable resources” (65% vs. 56% global average), “biodegradable” (64% vs. 56% global average) and “climate change” (65% vs. 59% global average). However sophisticated German citizens may be in their understanding and expectations of CSR, they see their own role as more limited, and view purchasing power as their biggest and most effective mouthpiece for change.

German citizens more closely reflect the global average in their willingness to purchase (86% vs. 89% global average) or boycott CSR products (90% vs. 90% global average); however, enthusiasm drops when corporate efforts span beyond the shopping aisle. Germans are less likely to be willing to donate (66% vs. 76% global average), voice opinions (62% vs. 72% global average) or volunteer (55% vs. 72% global average) if given the opportunity. And although this group uses a company’s CSR commitments as a lens in deciding what to buy or where to shop (81% vs. 84%

global average), it is less likely than the global average to consider CSR when deciding where to work (72% vs. 79% global average), what companies should do business in their communities (72% vs. 84% global average) or what investments to make (52% vs. 67% global average).

Given this group’s inclination to support CSR through shopping, it is not surprising they are the most likely population to look on the product package for CSR information (23% vs. 19% global average). This traditional communications channel can serve as a key way for companies to communicate impact as German consumers are among the least likely to recognize the impact their purchases are making on social and environmental issues (22% vs. 29% global average).

IMPLICATION FOR COMPANIES:

Although German consumers have strong expectations and understanding of CSR efforts, they may not take their individual participation far beyond the cash register. Companies looking to reach this audience should focus engagement at point-of-sale through differentiating products and providing clear information highlighting individual impact on-package.

## Five Defining Insights

Perception of Individual Impact	Less likely to see impact of purchases (22% vs. 29% global average)
Willingness to Participate	In alignment with global average on purchase (86% vs. 89% global average) and boycott (90% vs. 90% global average); less likely to donate (66% vs. 76% global average), voice opinions (62% vs. 72%) or volunteer (55% vs. 72% global average)
Role of Busines	Believes role of business is to do more than make a profit, but to operate responsibly (91% vs. 91% global average)
Confusion Over CSR Messages	Less likely to be confused by CSR messages (52% vs. 65% global average)
Desired Communications Channels	On product/package (23% vs. 19% global average), Traditional media (20% vs. 15% global average), Advertising (13% vs. 14% global average)





## COUNTRY SNAPSHOT

# Japan

CSR in Japan continues to rely solely on business to make social and environmental change. Although Japanese consumers maintain high expectations of companies, they do not see a personal role for themselves in this process.

Of the nine countries surveyed, Japanese consumers stood out with the lowest levels of enthusiasm for direct participation in companies' CSR efforts. They are the least likely market to switch products to one associated with a cause (72% vs. 90% global average) and also the least likely to proactively seek out responsible products every time they shop (68% vs. 84% global average). Further, Japanese citizens do not share the same eagerness as other countries to participate in company-lead CSR efforts. This group is the least likely to have purchased a responsible product in the past 12 months (43% vs. 63% global average), with an even further decline in reported purchase over time (49% in 2013; 61% in 2011).

Although they may not be likely to get involved in CSR efforts, the Japanese still have high expectations for companies – with only slightly less conviction than other countries. Most Japanese consumers (85% vs. 91% global average) expect companies to do more than make a profit – they must also operate responsibly by addressing social and environmental issues.

Japanese citizens are on par with the global average in holding companies accountable for communicating results if they've made CSR commitments (83% vs. 86% global average); however, a word of caution: companies should also keep in mind that Japanese consumers are not as forgiving of corporate imperfections. They are the least likely to say it's okay if a company isn't perfect, as long as it's honest (76% vs. 87% global average).

### IMPLICATION FOR COMPANIES:

Although Japanese citizens may not directly participate in a company's CSR efforts, they have high expectations of companies to act responsibly and report on their progress. Companies should view CSR as a reputation builder and protector, not as a strategy for deeper consumer engagement. To build trust and confidence, companies must focus on communicating progress and impact of CSR efforts.

## Five Defining Insights

Role of Business	Least likely to believe role of business is to do more than make a profit, but to operate responsibly (85% vs. 91% global average)
Reported Behavior	Least likely to have purchased a responsible product in the past 12 months (43% vs. 63% global average)
Expectations of Companies	Least likely to say it's okay if a company isn't perfect, as long as it's honest (76% vs. 87% global average)
Willingness to Seek Out Products	Least likely to proactively seek out responsible products every time they shop (68% vs. 84% global average)
Confusion Over CSR Messages	Least likely to be confused by CSR messages (50% vs. 65% global average)

# Conclusion

The 2015 Cone Communications/Ebiquity Global CSR Study reveals a higher level of understanding, awareness and support of corporate social responsibility efforts from the world's consumers. Whether it's the unbridled optimism and passion shown in developing countries or the more seasoned consumers in markets where CSR is omnipresent, there is a universal expectation for companies to be a strong partner in change, providing ever-more opportunities for participation.

Today's empowered global consumer is willing to take personal accountability and make sacrifices for the greater good, opening the door for companies to push the boundaries for future innovation and engagement. Despite distinctiveness on a country-by-country level, global consumers remain steadfast as open-minded partners for collaboration to drive forward social and environmental progress. Now, companies must advance CSR beyond a brand attribute to create an entirely new CSR experience.

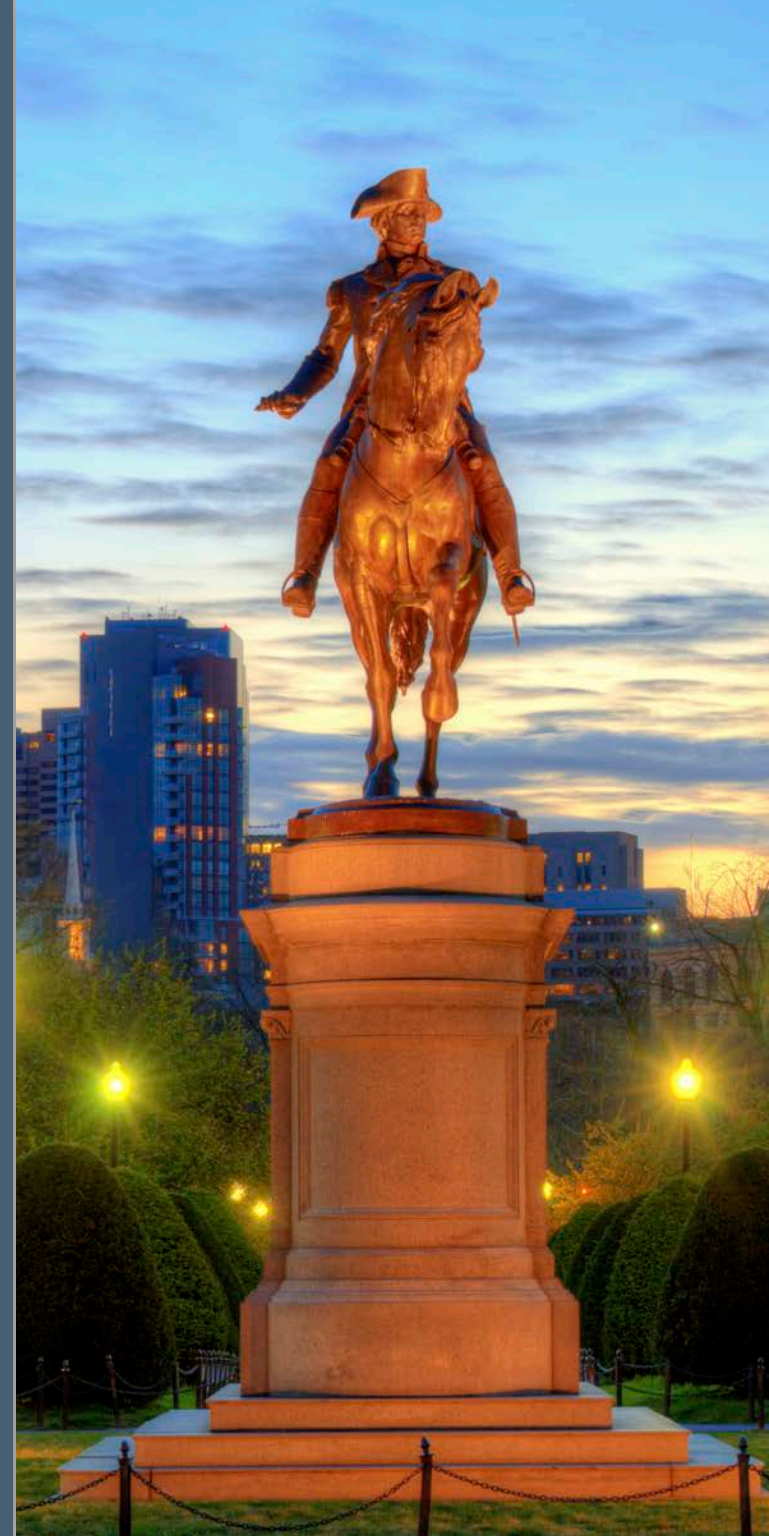


# About Cone Communications

Cone Communications is a public relations and marketing agency with expertise in corporate social responsibility, cause marketing, nonprofit marketing, corporate communications and brand marketing. With Boston and NYC offices, Cone is an agency with an impressive Fortune 500 client roster.

Consistently ranked by third-party experts as one of the top agencies in the country for CSR strategy and communications, Cone is recognized as the nation's leader and one of the founders of cause marketing. The agency has created some of the country's most visible and memorable programs, including the Avon Breast Cancer Crusade and American Heart Association's Go Red for Women campaign.

Cone's brand marketing services span more than 30 years of traditional media relations, event management, digital and social media, brand positioning and entertainment marketing. The agency has been recently recognized for award-winning marketing communications programs for Ben & Jerry's, Fair Trade USA, General Mills, HAI Group, Lindt USA and many others. Cone Communications is a part of the Omnicom Group (NYSE: OMC) ([www.omnicomgroup.com](http://www.omnicomgroup.com)).



# Cone Communications & Corporate Social Responsibility

Cone's CSR team is composed of dedicated subject matter experts in the fields of sustainable business practices and social impact, as well as skilled communicators. Cone approaches client needs with diverse backgrounds and real world experiences to create breakthrough campaigns that do not compromise substance. All of the agency's work is grounded in insights that are critical in delivering positive business, brand and societal impacts.

Cone helps its clients bring responsible business commitments to the forefront of their brands and effectively engage diverse stakeholders across multiple channels and touch points. The agency helps organizations customize the right content, micro-messaging and channel activation based on deep stakeholder mapping and insights. When connected, these touch points create a cohesive, meaningful experience that is approachable, authentic and impactful.

Select services include:

- CSR strategy and reporting
- CSR campaign development
- Stakeholder engagement and partnership development
- Corporate philanthropy
- Employee engagement
- Cause marketing
- Thought leadership
- Corporate and marketing communications
- Digital engagement
- Issue management and crisis prevention

Cone has developed CSR communications strategies for leading brands such as CVS Health, General Mills, Northwestern Mutual and many more. Together with its clients Cone has raised more than \$1 billion for important social issues. The agency has also created some of today's most recognizable CSR brands, including Timberland's Earthkeepers, American Heart Association's Go Red for Women and Time Warner Cable's Connect a Millions Minds.





## About Cone Communications' CSR Insights & Intel Team:

For almost two decades, Cone's dedicated Insights & Intel team has tracked the news, trends, research and best practices in CSR. Cone's pioneering research in corporate social responsibility became the reference for companies seeking to understand this critical and rapidly evolving landscape. The agency has conducted more than 35 primary research reports since and still provides the most comprehensive understanding of the changing attitudes, expectations and behaviors of consumers and employees when it comes to a company's involvement in social issues and responsible business practices.

For more information about Cone Communications' research and services, please contact:

Alison DaSilva  
Executive Vice President,  
CSR Insights & Intel  
adasilva@conecomm.com

Whitney Dailey  
Supervisor,  
CSR Insights & Intel  
wdailey@conecomm.com





# About Ebiquity

Ebiquity (Ebiquity.com) is a leading independent marketing analytics specialist which helps brands across the world exploit an evolving marketing landscape and achieve success. They provide customized data analytics, online tools and consultancy services to address the marketing and communications challenges of their 1,000+ clients.

Their 800-strong team, based in 14 countries, assists brands in 3 key areas by providing the following services.

## Understand and improve the impact investments have on core business KPIs

For: marketing, insight, analytics and commercial teams

Services include: Marketing ROI & Effectiveness, Multi-channel Analytics

## Drive transparency and improve media performance

For: media, marketing and procurement teams

Services include: Media Auditing, Pitch Management, Media Strategy Consulting

## Plan more effectively for better advertising and communications results

For: marketers, corporate affairs, insight teams, agencies and media owners

Services include: Media Analysis, Social Media Analysis, Market & Stakeholder Research, Advertising Intelligence

Their Reputation & Research team (formerly Echo Research) is a global specialist in reputation analysis and communications research, enabling organizations to measure how they are seen among their stakeholders and to protect the integrity of their brands and reputation. Over the past 25 years, their reputation and communications effectiveness research has helped over 500 world class clients. Service offerings include:

- Media Content Analysis
- Social Media Analytics
- Stakeholder Research
- Reputation Audits
- Consumer Insight
- Brand Image Research
- Research for Thought Leadership and Publicity

For more information about Ebiquity's research and services, please contact:

Jennifer Ciuffo Clark

Research Director

Jennifer.Clark@ebiquity.com







855 Boylston Street  
Boston, MA 02116

Phone: 617.227.2111  
Fax: 617.523.3955

[www.conecomm.com](http://www.conecomm.com)  
[www.conecomm.com/global-CSR-study](http://www.conecomm.com/global-CSR-study)

Follow us on Facebook or Twitter @Cone

The paper this report was produced on is FSC® certified, Rainforest Alliance Certified™, has SFI® Certified Sourcing and contains 10% post-consumer recycled content.

This report was printed using eco-friendly low VOC inks.

The company that printed this report is a member of the EPA Green Power Partnership, whose goal is to reduce the risks associated with climate change, while supporting the development of new, renewable energy generation in the U.S. Eligible green power is sourced from specific U.S.-based generation facilities and includes electricity generated from solar, wind and certain forms of biomass and hydropower.

Photography and illustrations ©Thinkstock.

FSC Logo