



Corporate Social Responsibility

MONITOR 2001

Global Public Opinion on the Changing Role of Companies

Executive Brief

The 2001 Corporate Social Responsibility (CSR) Monitor, which builds on Environics International's 1999 Millennium Poll on CSR, is an annual study based on surveys of representative samples of about 1,000 citizens in each of 20 countries across five continents. The field work in each country was conducted between December 2000 and February 2001 by respected social research organizations under license with Environics International. The 2002 CSR Monitor will be available in March 2002.

The CSR Monitor provides companies with insights into the attitudinal context within which they operate in societies around the world, examines where companies are particularly vulnerable on social responsibility, and explores the business case for good corporate citizenship.



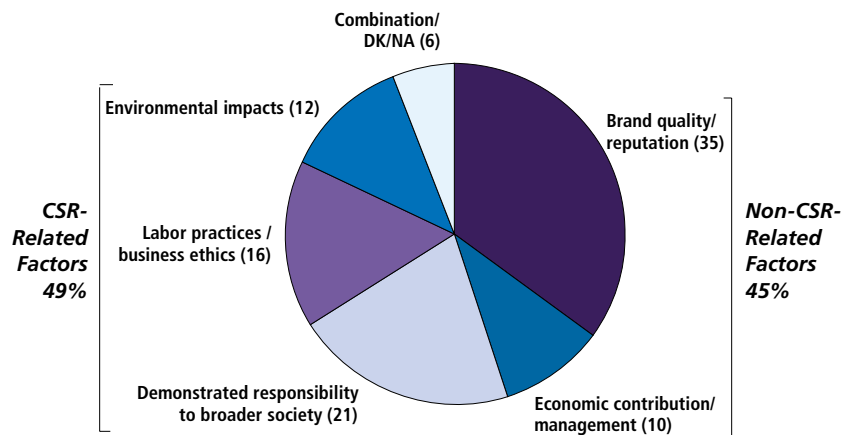
Please note that in November 2003,
Environics International became GlobeScan Incorporated.
For more information on this press release please see our contact information at: www.GlobeScan.com

The following is a selection of findings and insights from the 2001 CSR monitor, based on 20,978 interviews with average citizens across the world:

Social responsibility makes a greater contribution to corporate reputation today than brand image, especially in wealthy countries.

According to consumers in wealthy countries especially, a company's social performance (i.e., its commitment to labor practices, the environment, etc.) has a significant impact on their impression of the company. In contrast, brand quality outstrips social performance as the most important determinant of corporate reputation in the developing world.

Most Important Factor When Forming Impression of a Company
G20 Countries Surveyed



See Notes to Reader for list of G20 countries surveyed.

Views and behaviors of Opinion Leaders indicate that consumers' social expectations of companies will continue to grow.

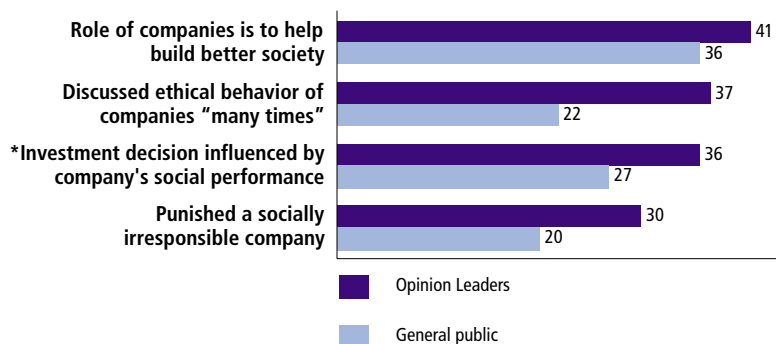
Environics' proprietary "Opinion Leader" typology identifies the 13 to 15 percent of the population in each country that most influence the opinions of their fellow citizens.

As we found in our 1999 Millennium Poll on CSR, these Opinion Leaders continue to expect more from companies than the general public and they are more engaged in issues related to corporate social responsibility.

As consumers, Opinion Leaders are significantly more ethically demanding than the general public; in fact they are 50 percent more likely

Staying Ahead of the Curve on CSR

Opinion Leaders vs General Public: G20 Countries Surveyed



*Subsample of shareholders

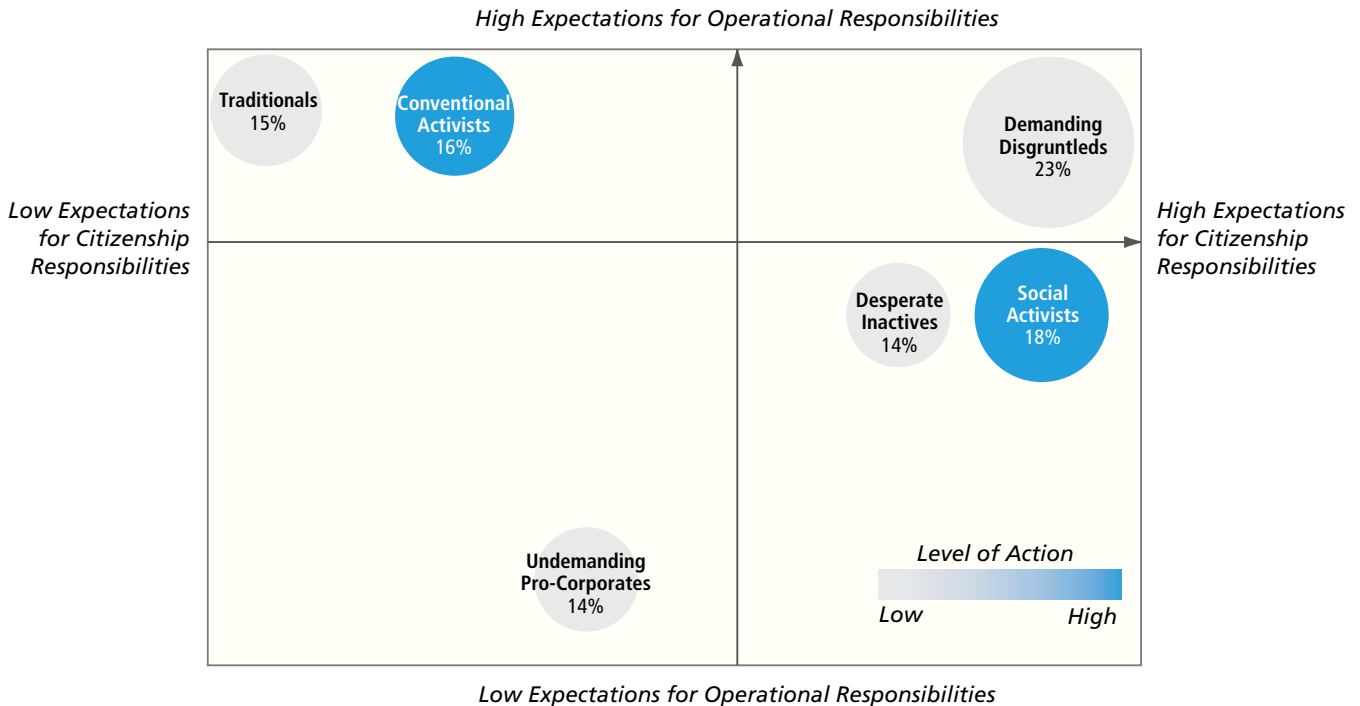
than the general public to punish socially irresponsible companies.

These findings suggest that in coming years companies will come under even greater public pressure to deliver on their broader social responsibilities. Certainly, the strengthening of views since our 1999

survey suggest this is happening.

In addition, Environics predicts that ethical consumption and investing will grow as the general public follows the lead of Opinion Leaders, creating expanded market opportunities for socially responsible companies.

CSR Segmentation Map



Two distinct groups of citizens, making up one third of consumers across the world, are engaged in pressuring companies to assume greater social responsibility.

Using factor and cluster analysis, Environics discovered two activist segments of consumers. The first group—Conventional Activists—demand that corporations fulfill their operational responsibilities, that is, duties they encounter in the normal course of their business operations (e.g., treating employees fairly, protecting the environment, etc.).

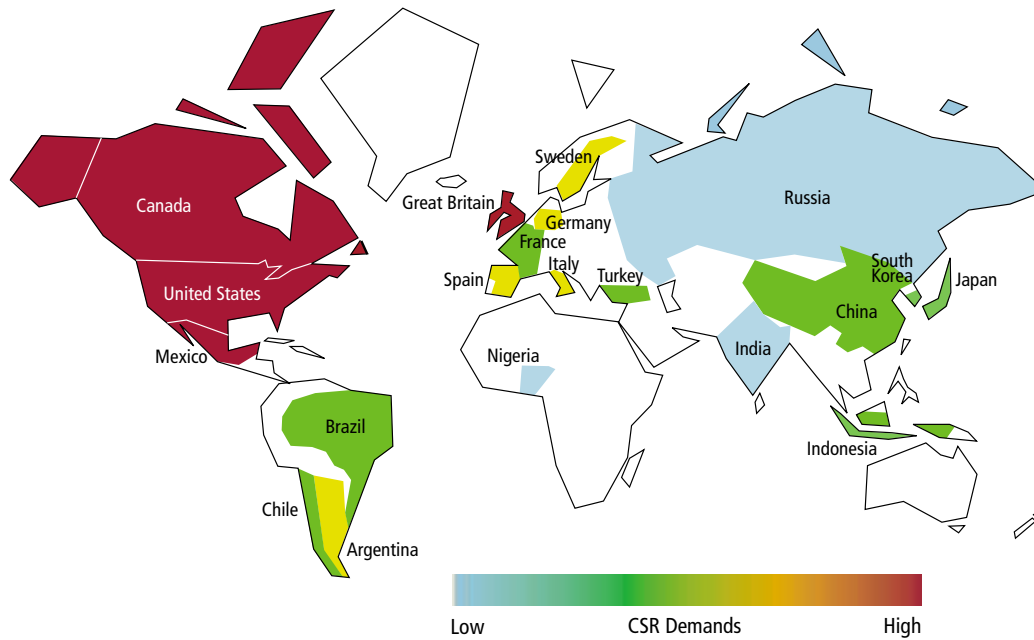
The second group—Social Activists—expect companies to exercise “citizenship” by going beyond the sphere of their everyday operations and playing a socially minded leadership role to improve conditions for everyone (e.g., reduce the gap between rich and poor, solve social problems, etc.).

While both of these groups are highly active as ethical consumers and tend to be over-represented by Opinion Leaders, Conventional Activists are more likely to be North Americans with high levels of education and income. Social

Activists, however, are equally represented across most demographic groups and are fairly evenly distributed across all of the 20 countries surveyed.

Companies can use the insights from this segmentation analysis to better design and target their corporate responsibility policies, programs, and communications to the specific concerns of their key audiences. For example, both “Activist” segments have very high levels of Internet use, suggesting this medium is key to reaching them.

Environics' CSR Index Map



North American consumers represent the most socially demanding market for companies.

To determine which markets are the most demanding of companies with respect to social responsibility, Environics International created a single metric: the Corporate Social Responsibility (CSR) Index. The CSR Index is composed of the following dimensions:

- Consumer behavior toward socially irresponsible companies
- Expected role of companies
- Influential factors in forming impressions of companies
- Ability to name a socially irresponsible company

From the above CSR Index map of countries, the United States, Canada, Great Britain, and Mexico are clearly the markets

which demand the most of companies. Most European countries, as well as Argentina, are ranked as second-tier countries on the CSR Index.

Companies can expect relatively modest demands for being socially responsible in Asia, France, Turkey, Brazil, and Chile. India, Russia and Nigeria represent markets where there is the least demand for companies to be socially responsible.

For more information, contact:

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Environics International is a global public and stakeholder opinion research consultancy with particular expertise in corporate social responsibility, globalization, the environment, sustainable development and food issues.