

A large, light gray circular graphic containing a white silhouette of a world map, centered on the Atlantic Ocean. The text "GLOBAL NGOs" is overlaid on the map in a bold, black, sans-serif font.

GLOBAL NGOs

The delicate relationship between
the world's biggest NGOs and
multinational corporations

Ipsos MORI decided to run a global online survey to ask adults their views on the relationship between large corporations and global Non- Governmental Organisations (NGOs).

The opinions and actions of international NGOs, charities, think tanks and foundations are driving the CSR and sustainability agenda across the world. The opinions of these Global NGOs can directly shape how a company, and its activities, are perceived by the wider stakeholder community and the public, shape how an organisation's sustainability strategy is received and directly influence their wider corporate reputation.

In light of these findings, Ipsos MORI is also pleased to announce that we will be conducting a new Global NGO Survey, which intends to interview key individuals within the Global NGO community, providing an independent review of the opinions of leaders and senior policy developers.

One in two adults agree that major corporations should be listening to Global NGOs... but are they?

Around half (49%) of adults across 24 countries surveyed agree that 'major corporations should be listening to what Global NGOs have to say about corporate behaviour' (fig. 1). The majority of countries place above the average (49%); agreeing that 'major corporations should be listening to what Global NGOs have to say about corporate behaviour'.

The extent to which corporations should be listening to NGOs does vary between countries with adults in Turkey more likely to agree than any other country. Nearly three in four (73%) adults in Turkey agree that major corporations should be listening

SHOULD CORPORATIONS BE LISTENING TO NGOS?

Major corporations should be listening to what Global NGOs have to say about corporate behaviour (% agree)

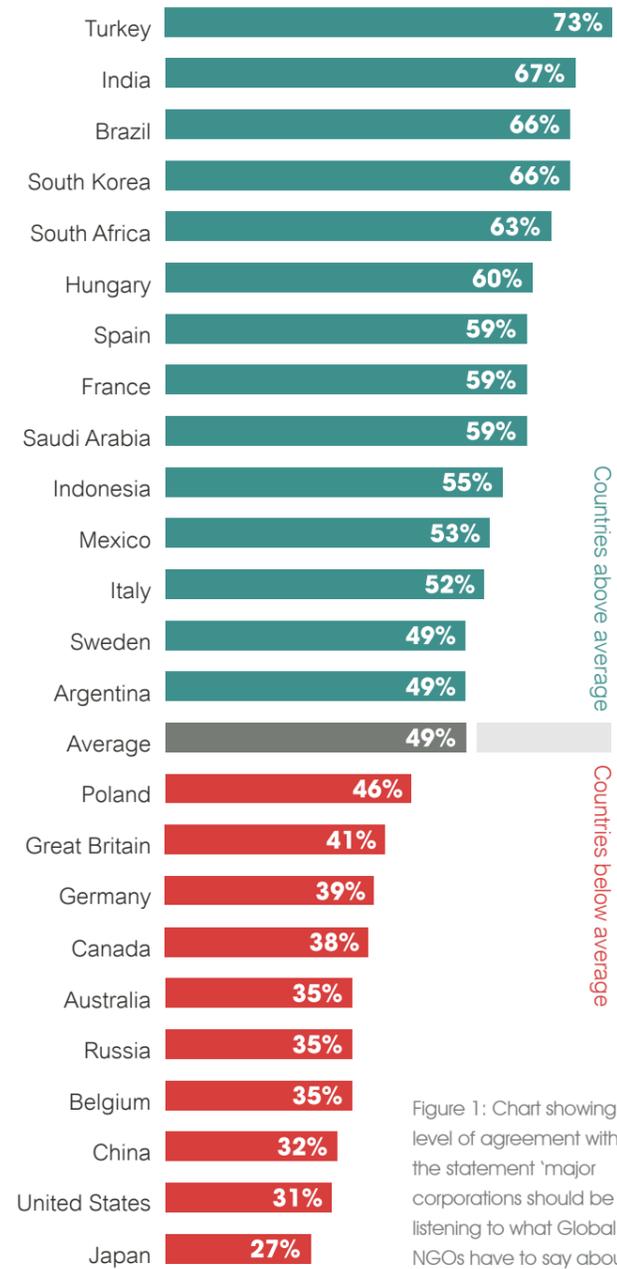


Figure 1: Chart showing level of agreement with the statement 'major corporations should be listening to what Global NGOs have to say about corporate behaviour' among countries

to Global NGOs closely followed by around two thirds of adults in India (67%), Brazil (66%), South Korea (66%) and South Africa (63%). At the other end of the scale, adults in China (32%), the United States (31%) and Japan (27%) are least likely to agree with this statement implying a currently weak relationship between corporations and NGOs in these countries.

European countries are more divided on the matter - with those in Italy, Sweden, Spain, Hungary and France more likely to be in agreement than the country average (49%) and adults in Great Britain (41%), Germany (39%), and Belgium (35%) less convinced that major corporations should be listening to NGOs.

To what extent do NGOs influence behaviour of major corporations?

While the majority of countries rank above average in their agreement that corporations should listen to NGOs, far fewer countries believe that NGOs do in fact influence behaviour. 14 of the 24 countries surveyed rank below the country average when asked if 'Global NGOs influence the behaviour of major corporations' (see fig. 2).

Across all countries, on average, one in three adults (36%) agree that Global NGOs influence the behaviour of major corporations. This is compared to one in two (49%) who believe corporations *should* be listening to NGOs and suggests that large corporations aren't living up to public expectations. There is a discrepancy between how the relationship between NGOs and corporations should function and how it does function in reality.

Encouragingly though for large corporations, four out of the top five countries that agree corporations *should* be listening to NGOs (India, Turkey, Brazil and South Africa), also rank within the top

DO GLOBAL NGOS INFLUENCE CORPORATIONS' BEHAVIOUR?

Global NGOs influence the behaviour of major corporations (% agree)

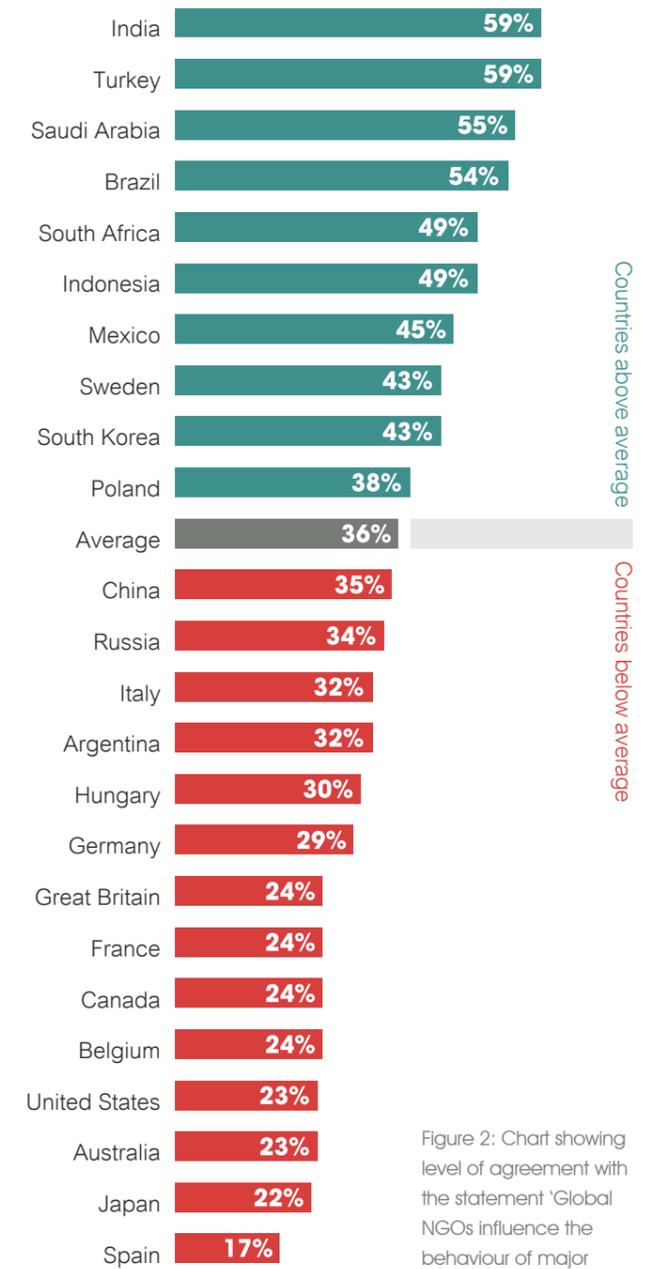


Figure 2: Chart showing level of agreement with the statement 'Global NGOs influence the behaviour of major corporations' among 24 countries

five who agree that NGOs do influence behaviour. South Korea, however, drops to 9th position with 43% in agreement with this statement (compared to 66% who think NGOs should be listened to).

The majority of European countries surveyed also appear to be more cynical regarding the influence of NGOs (with the exception of adults living in Turkey, Sweden and Poland) and are less likely to agree that 'Global NGOs influence the behaviour of major corporations' compared to the country average (36%).

Furthermore, all G7 countries - Canada, France, Germany, Italy, Japan, Great Britain and the United States - also position below the average (36%) when asked if Global NGOs influence major corporations' behaviour; again emphasising that corporations are not living up to expectations in many countries.

The impact of financial aid on the influence of NGOs

One explanation for the higher proportion of adults in Turkey and India that agree NGOs should be listened to and have an influence on corporate behaviour may be linked to their receipt of financial aid. Between 2009 and 2013, Turkey and India received the most financial aid of all countries surveyed¹ with Turkey receiving over \$3 billion and India receiving over \$1.5 billion (see fig. 3).

That is not to say that corporations in countries requiring no financial or developmental aid should make any less effort to improve their relationships with

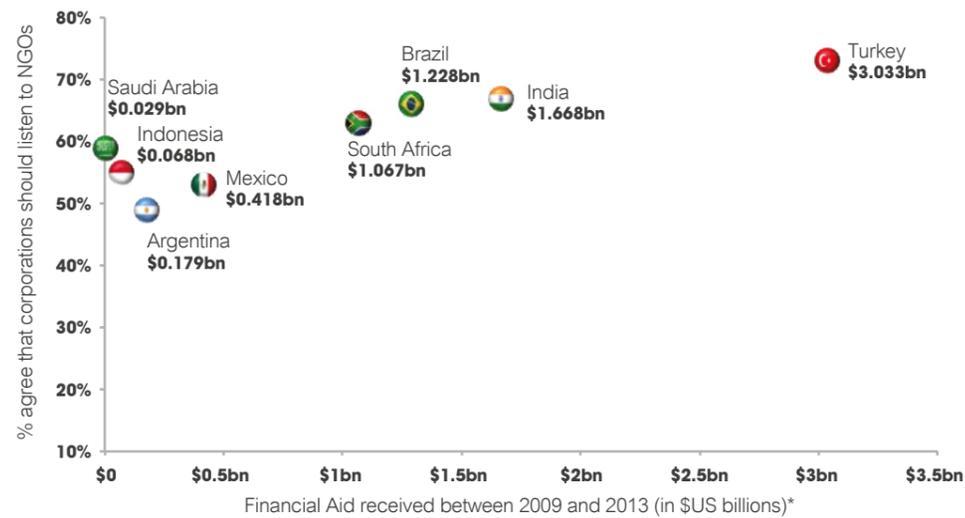


Figure 3: Chart showing relationship between influence of Global NGOs and countries receiving Financial Aid

RELATIONSHIP BETWEEN AID AND INFLUENCE OF NGOs

NGOs. One in two adults (49%) within 24 countries surveyed is in agreement that corporations should be listening to NGOs and acknowledges the influence NGOs should have on corporations. It would seem, however, that major corporations are failing to live up to expectations and closing their ears to them.

¹ <http://data.worldbank.org/indicator/DI.ODA.ALLD.CD> accessed 4th August 2014

The most influential Global NGOs

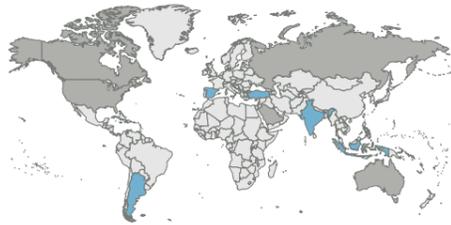
UNICEF ranks top as the most influential Global NGO across all 24 countries surveyed; around 3 in 10 adults (28%) consider UNICEF to be the most influential. This is followed by the World Health Organisation (WHO) with around 1 in 4 adults who consider them the most influential and the International Red Cross with one in five (21%) who consider them to be most influential.

The most influential NGOs differ across the world. In China, the US and Mexico, the International Red Cross ranks top while Greenpeace and UNICEF tend to have greater influence in South America along with some parts of Europe and Asia. And, it is the WHO, that is considered to be most influential in India and South Korea.

There is also a significant proportion of adults in some of the countries surveyed that report they 'don't know' which NGOs they would consider to be most influential - perhaps due to lack of awareness of their activities and how they operate internationally. This would seem to correspond to the proportion of adults globally, who are less likely to agree that Global NGOs influence the behaviour of major corporations. For instance, 44% of adults in Japan say that they don't know who they would consider to be the most influential Global NGOs and just 22% claim that Global NGOs influence the behaviour of major corporations. Global NGOs still have a lot of work to do to build their relationships with these corporations.



UNICEF



Top Five		Bottom Five	
01 Spain	48%	25 Russia	5%
02 India	45%	24 Canada	12%
03 Argentina	43%	23 United States	15%
04 Turkey	43%	22 Australia	17%
05 Indonesia	40%	21 Saudi Arabia	18%

WHO



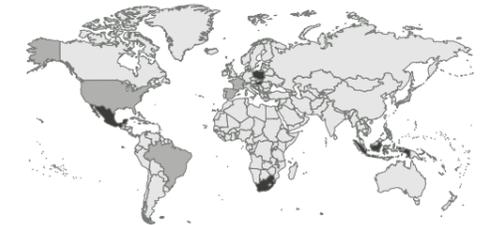
Top Five		Bottom Five	
01 India	42%	25 Italy	11%
02 South Korea	39%	24 Saudi Arabia	11%
03 Indonesia	35%	23 Russia	13%
04 Turkey	33%	22 Belgium	14%
05 Hungary	31%	21 United States	14%

Red Cross



Top Five		Bottom Five	
01 China	39%	25 Turkey	4%
02 Argentina	31%	24 Saudi Arabia	10%
03 Spain	28%	23 South Korea	11%
04 United States	28%	22 Great Britain	14%
05 Mexico	27%	21 Indonesia	14%

World Bank



Top Five		Bottom Five	
01 Indonesia	33%	25 Brazil	7%
02 Poland	26%	24 Japan	7%
03 Mexico	24%	23 Spain	7%
04 South Africa	24%	22 United States	7%
05 Hungary	22%	21 France	8%

Greenpeace

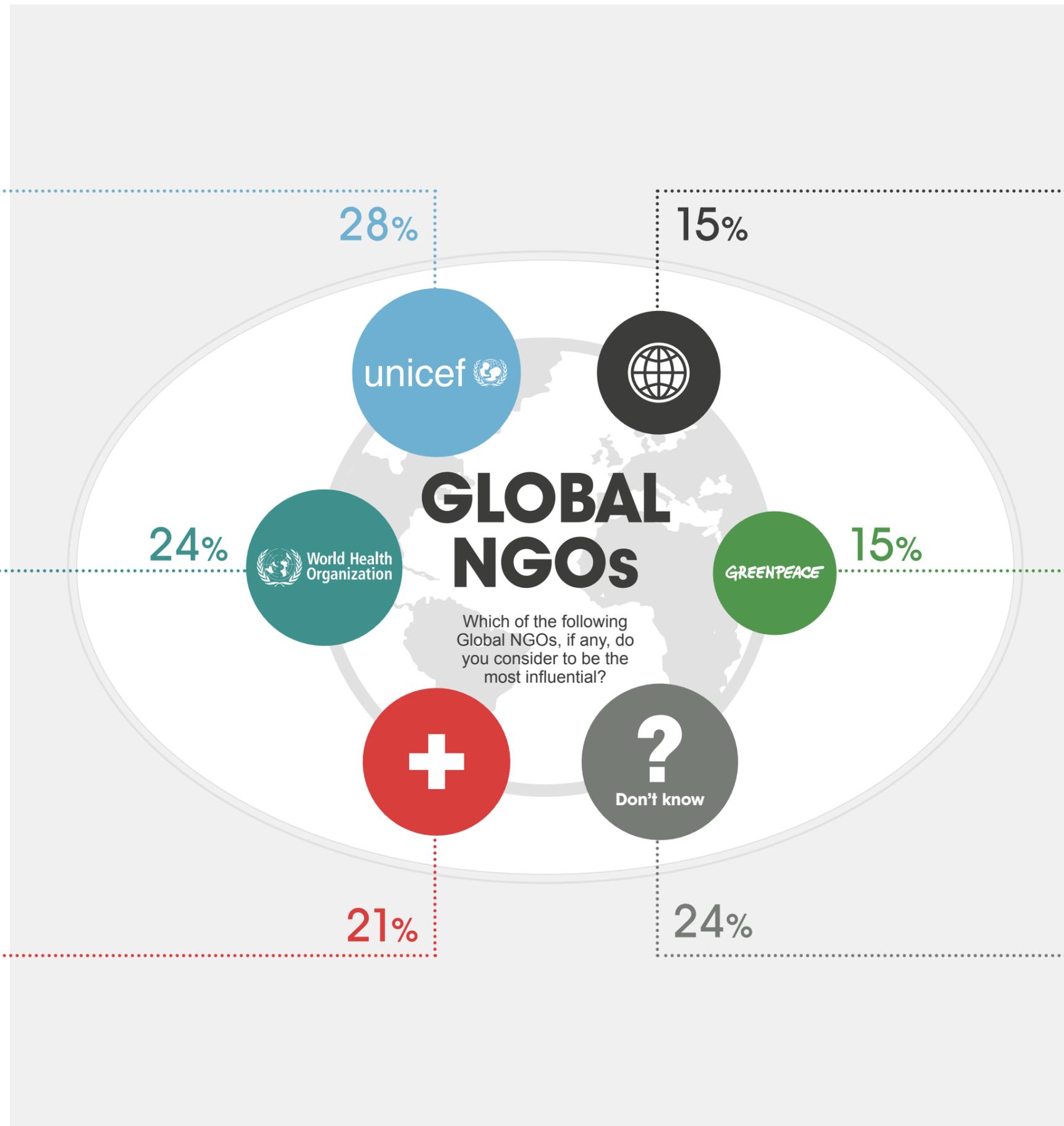


Top Five		Bottom Five	
01 Brazil	31%	25 Saudi Arabia	2%
02 Argentina	30%	24 Japan	3%
03 Turkey	29%	23 Great Britain	7%
04 France	24%	22 India	7%
05 Spain	21%	21 United States	7%

Don't know



Top Five		Bottom Five	
01 Japan	44%	25 India	8%
02 Belgium	40%	24 Mexico	11%
03 United States	39%	23 Turkey	11%
04 Canada	38%	22 Brazil	13%
05 Australia	36%	21 China	14%



About this Survey

The survey was conducted via Ipsos' Global @dvisor in 24 countries around the world via Ipsos' Online Panel system. An international sample of 18,001 adults aged 16-64 (18-64 in US & Canada) was interviewed. Approximately 1000 adults were interviewed in Australia, Canada, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Spain, the United States and approximately 500 adults were interviewed in Argentina, Belgium, Hungary, Indonesia, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey.

Fieldwork was conducted between 1st April and 15th April 2014. Weighting was applied to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data and to provide results intended to approximate the sample universe.

About Ipsos MORI

Ipsos MORI is a full service market research agency and a brand that is highly regarded by both the research community and the media. It is well known for the quality of its research outputs and the integrity of its data.

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