

Broadcasting and Advertising Sector - 2018 Report – Key Findings



94 companies in the sector

Vigeo Eiris Technology, Media, Telecommunications cluster

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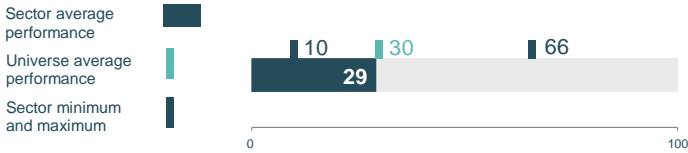
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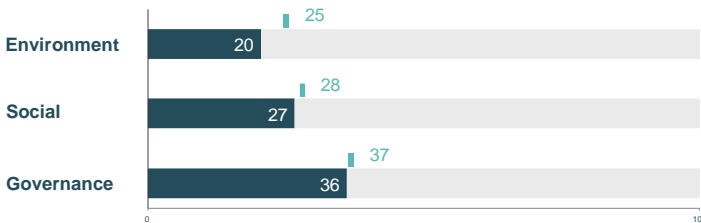
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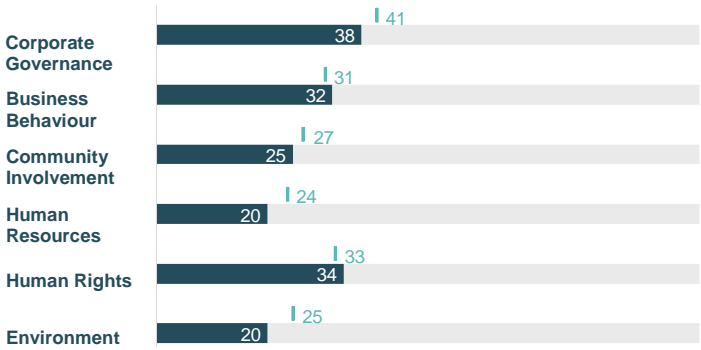
Key Findings 2018 – Broadcasting and Advertising sector



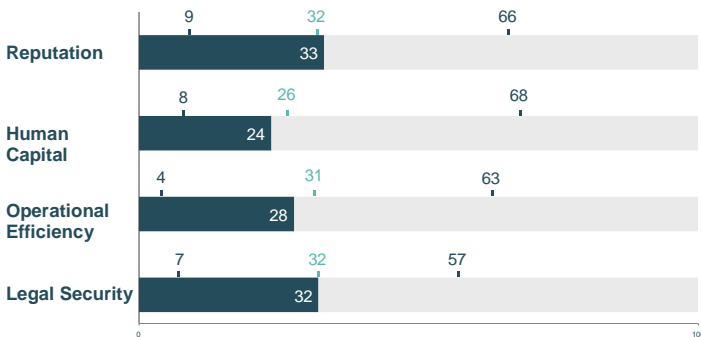
ESG PERFORMANCES – Sector & Universe



DOMAIN PERFORMANCES – Sector & Universe



RISK MITIGATION – Sector & Universe



TAKEAWAYS

- ▶ Sexual harassment remains one of the most critical human rights topics for the Broadcasting & Advertising Sector.
- ▶ The societal impacts of the industry's products and services on sensitive audiences is becoming a pressing issue as the number of controversies registered is on rise.
- ▶ Amid the technological changes that the Broadcasting and Advertising industry is experiencing, reorganisation is on the rise.
- ▶ In a sector with a wide influence, preventing corruption and ensuring content integrity is a challenge.

TOP PERFORMERS

- Europe: TF1 (66/100)
- North America: Walt Disney (40/100)
- Asia Pacific: oOh!media (33/100)
- Emerging Markets: ASTRO MALAYSIA HOLDINGS BHD (35/100)

MOST IMPROVED since 2017

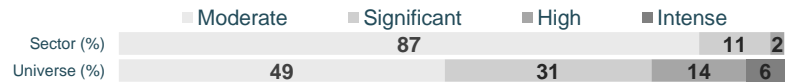
- Europe: RTL Group; Eutelsat Communications (+13)
- North America: Charter Communications (+4)
- Asia Pacific: No progress
- Emerging Markets: Grupo Televisa (+14)

MOST MATERIAL DRIVERS

ADVANCED (60-100)	
ROBUST (50-59)	
LIMITED (30-49)	<ul style="list-style-type: none"> Fundamental human rights Boards of Directors Corruption and broadcasts' integrity Non-discrimination and diversity
WEAK (0-29)	<ul style="list-style-type: none"> Societal impact of products/services Reorganisation

CARBON FOOTPRINT

Share of companies in each level of carbon footprint



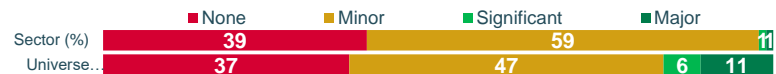
ENERGY TRANSITION

Share of companies in each level of energy transition performance



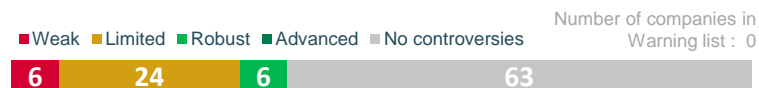
SUSTAINABLE GOODS & SERVICES

Share of companies in each level of involvement in goods and services contributing to sustainable development



CONTROVERSIES RISK MITIGATION

Share of companies in each performance level in terms of controversy risk management



About this document

This document is an extract of the Vigeo Eiris 2018 Report on the Broadcasting & Advertising General sector.

The full report contains:

- More detailed information on performances and impacts highlighted here (data for each zone, historical evolution on 3 years of global performance and on each criterion, top performers on each domain, etc.)
- Detailed description of each takeaway on risks and opportunities
- The overview of methodological framework applied to the sector (weights of criteria, nature of stakeholders' expectations and their vulnerability on each topic).
- Detailed description of the methodology of all Vigeo Eiris research lines.

If you are interested in knowing more, please contact our customer services team at: global-sales@vigeo-eiris.com.

About Vigeo Eiris

Vigeo Eiris is an independent international provider of environmental, social and governance (ESG) research and services for investors and public & private organisations. We undertake risk assessments and evaluate the level of integration of sustainability factors within the strategy and operations of organisations.

Vigeo Eiris offers a wide range of services:

- ▶ For investors: decision-making support covering all sustainable and ethical investment approaches (including ratings, databases, sector analyses, portfolio analyses, structured products, indices and more)
- ▶ For companies & organisations: supporting the integration of ESG criteria into business functions and strategic operations (including sustainable bonds, corporate ratings, CSR evaluations and more)

Vigeo Eiris methodology and rating services adhere to the highest quality standards. With a team of more than 240 experts of 28 different nationalities, Vigeo Eiris is present in Paris, London, Boston, Brussels, Casablanca, Hong Kong, Milan, Montreal, Rabat, Santiago and Stockholm.

The Vigeo Eiris Global Network, comprising 6 exclusive research partners, is present in Australia, Brazil, Germany, Israel, Japan and Spain. For more information: www.vigeo-eiris.com

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