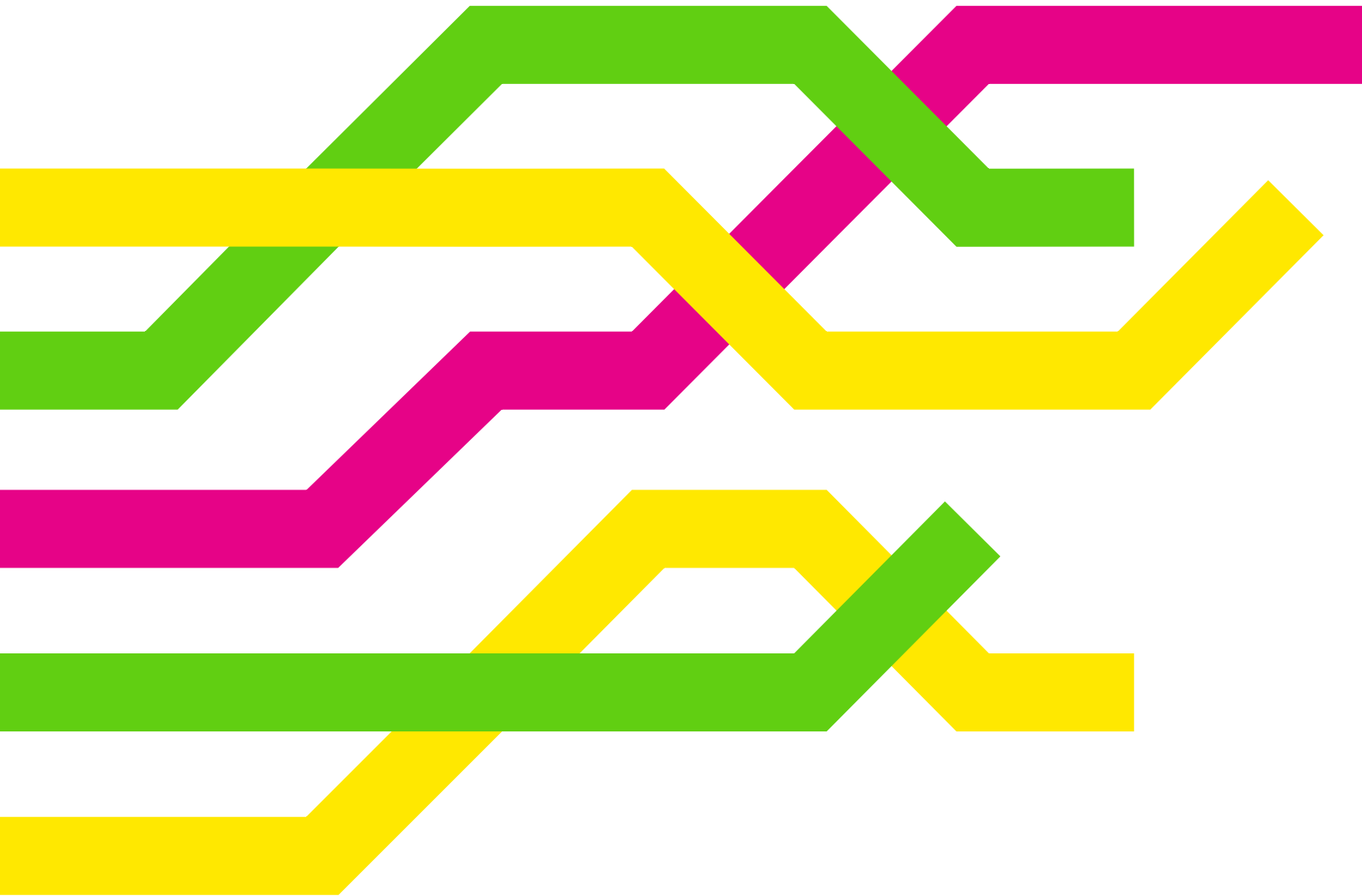




The 2019

Sustainability Leaders



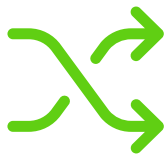
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About the GlobeScan-SustainAbility Survey

A unique, collaborative platform that uses research-driven insights from the most influential global thought leaders to explore the biggest sustainability challenges.



Cross-sector

We survey thousands of sustainable development experts and practitioners from the following sectors:

- Corporate
- Government (including multi-lateral institutions)
- NGOs
- Research/academic organizations
- Service (e.g., consultants, media)



Up-to-date

We publish two reports each year, providing a regularly updated expert perspective on a range of timely topics.

Each publication is supported by a global interactive webinar where we invite leading thinkers and practitioners to contribute.



Leadership Focus

Every year we study recognition for leadership in sustainability, quantifying the extent to which experts identify companies for integrating sustainability into their business strategy.

We are grateful to Sustainable Brands for their contribution to this research.



Introduction

As part of the the 2019 GlobeScan-SustainAbility Leaders Survey, we asked over 800 experts representing business, government, NGOs and academia across 78 countries to evaluate the progress that institutions have made since the 1992 Earth Summit.

We also analyze expert views on which companies are considered to be leading on integrating sustainability into their business strategy, as well as which NGOs are making the largest contribution to advancing the sustainable development agenda.

The 2019 GlobeScan-SustainAbility Leaders Survey shows a slightly more balanced assessment of the corporate leadership landscape. While Unilever's eight-year trend of sustainability leadership continues, companies such as Patagonia, IKEA, Natura and Danone have all gained ground.

While Unilever remains in the number one position, with mentions from 37% of expert respondents, its ranking is down 10 points compared to 2018. These changes coincide with a changing of the guard at Unilever, with Paul Polman stepping down as CEO in January 2019, and Alan Jope still in the process of carving out his own leadership identity at the company. At the same time, IKEA, Patagonia, Natura and Danone have been ramping up their ambition and impact.

While Unilever's eight-year trend of sustainability leadership continues, companies such as Patagonia, IKEA, Natura and Danone have all gained ground.

Interface, the only company to have been mentioned as a top leader in every year the survey has ever been conducted, is the fourth most mentioned company. As in 2018, Nestlé, M&S, and Tesla also make it into the top cohort of companies.

The 2019 Leaders Survey reveals that integrating sustainability values and making sustainability part of the core business model are the key characteristics recognized by expert respondents as defining corporate leadership.

Among recognized regional sustainability leaders, Natura dominates in Latin America, while Patagonia leads in North America and Unilever and IKEA perform strongly in Europe. In Africa, Aramex and Woolworths claim the top position, while Toyota leads in Asia-Pacific.

The private sector, institutional investors and national governments are called out by experts as making the poorest contribution to sustainable development globally. In contrast, experts view the contributions NGOs are making to the transition to sustainable development very positively and point to WWF, Greenpeace, WRI, Oxfam and the Nature Conservancy as leading the charge.

The private sector, institutional investors and national governments are called out by experts as making the poorest contribution to sustainable development globally.

Survey Methodology

807 qualified sustainability experts completed the online questionnaire from April 11th to May 20th, 2019.

Sectors

Respondents were drawn from the following sectors:



5%
Government



16%
Academic
& Research



16%
NGO



21%
Service
& Media



36%
Corporate



6%
Other

Geography

Experts surveyed span 78 countries in the following regions:



9%
Africa /
Middle East



14%
Latin America



21%
Asia-
Pacific



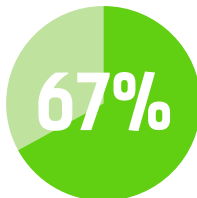
25%
North America



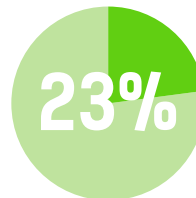
31%
Europe

Experience

Respondents have the following experience working on sustainability issues:



**More Than 10
Years**



**5 to 10
Years**



**3 to 4
Years**

Key Findings

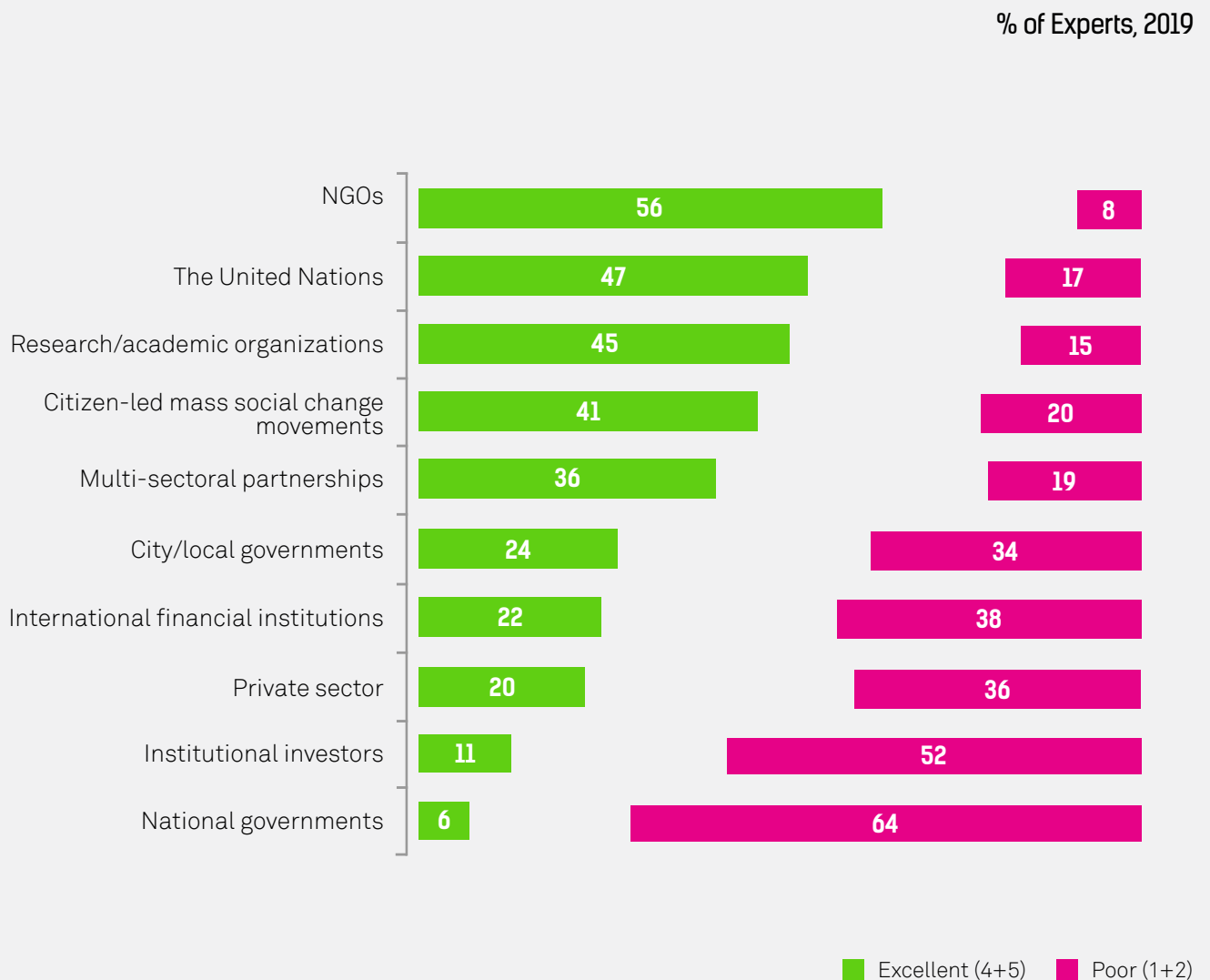
- Experts' positive perceptions of the contribution to sustainable development by the private sector and multi-sectoral partnerships have declined.** National governments continue to be perceived as contributing the least, and performance by institutional investors (included for the first time this year) is also seen as extremely poor.
- Unilever continues to be the company most recognized for its sustainability leadership by experts globally for the ninth consecutive year, mentioned by 37 percent of experts.** However, mentions are down 10 points compared to last year. At the same time, recognition of Patagonia and IKEA continues to grow closer to that of Unilever, with both companies making gains compared to past years.
- Experts point to integrated sustainability values and having a strategic approach as key reasons behind recognized leadership.**
- When asked specifically about corporate leaders headquartered in their own regions, experts in Europe (Unilever, IKEA) Latin America (Natura) and North America (Patagonia) are able to pinpoint clear leaders, whereas experts in Asia-Pacific and Africa/Middle East are more likely to point to a wide variety of leading companies.**
- World Wildlife Fund (WWF) remains the most widely recognized NGO among experts for its contribution to sustainable development, and recognition has increased compared to 2018.** Greenpeace continues to be the second most recognized NGO. Experts cite stakeholder engagement and collaboration as the key driver of NGO leadership.
- Climate change, biodiversity loss and water scarcity are the three sustainability issues of most concern for global experts, with poverty and inequality considered the most urgent social challenges of those put forward.**
- NGOs continue to be seen as the institution making the largest contribution to sustainable development.** The United Nations' is now ranked number two, and is viewed positively by the highest percentage of experts since its performance was first tracked in 2012.

Institutional Leaders



NGOs, UN and Academia Demonstrate Leadership

The performance of NGOs on contributing to progress on sustainable development is rated positively by a majority of respondents, and the performance of the United Nations is also seen as excellent by almost half of experts. Meanwhile, very few experts rate the performance of national governments positively, and institutional investors are also seen as making a poor contribution.



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

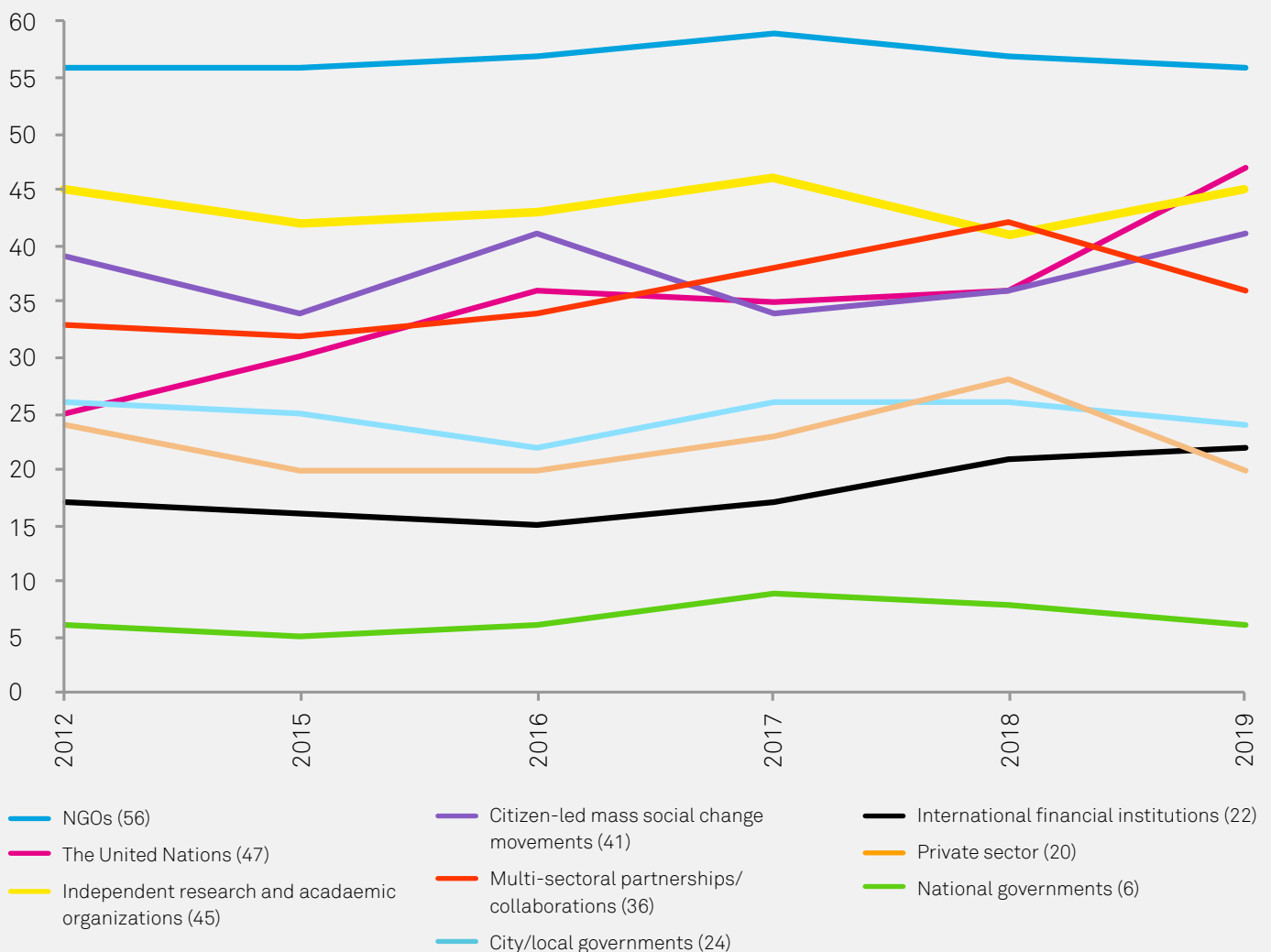
Please use a scale where 1 is "poor" and 5 is "excellent".



Business Performance Drops, While Views of the UN Improve

Expert perceptions of the contribution to sustainable development by the private sector and multi-sectoral partnerships have fallen compared to 2018, while the contributions of the United Nations and citizen-led movements are viewed more positively than a year ago.

% of Experts, "Excellent" (4+5), 2012–2019



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

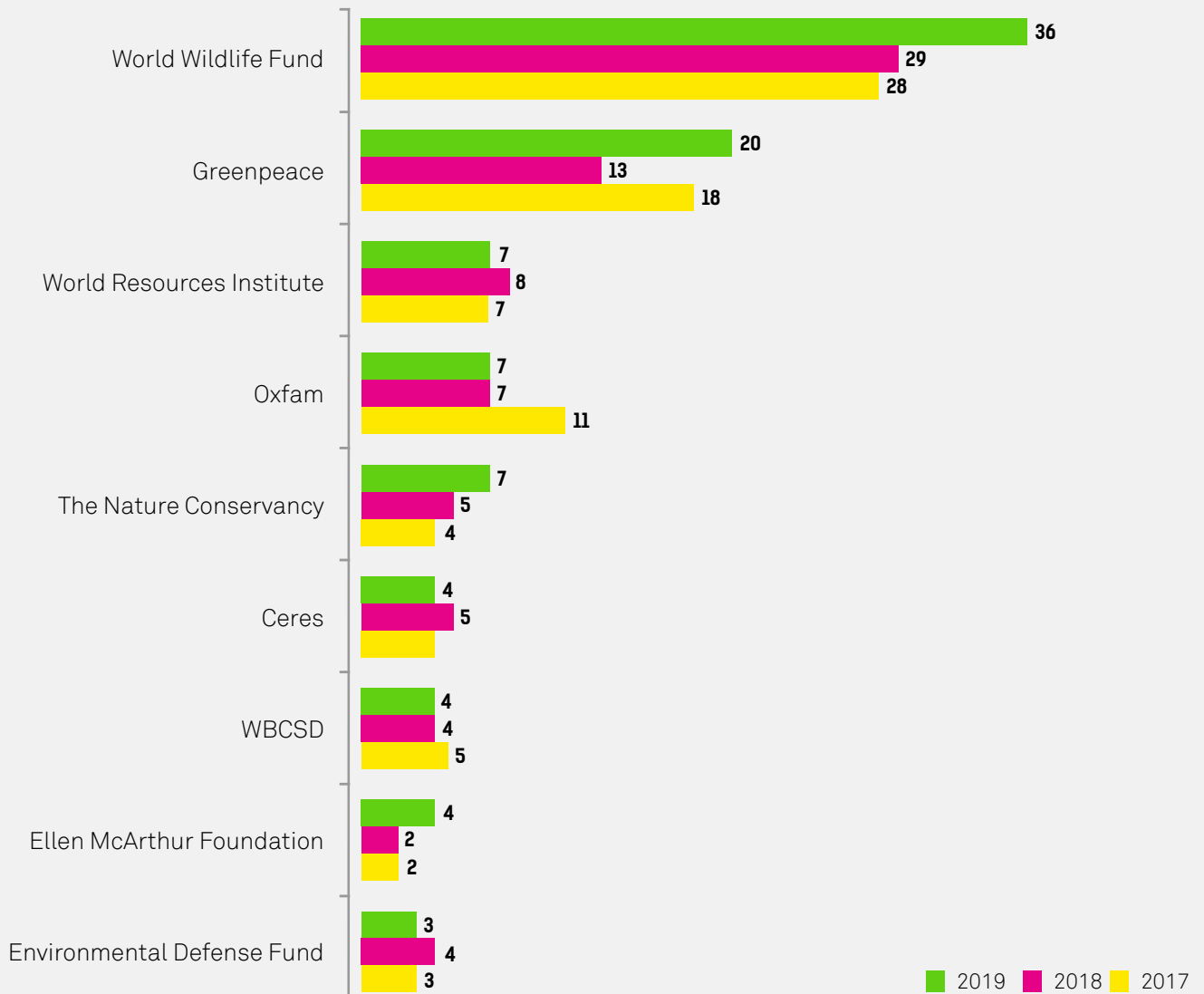
Please use a scale where 1 is "poor" and 5 is "excellent".

NGO Leaders

WWF and Greenpeace Increase Their Dominance

World Wildlife Fund and Greenpeace have both increased their lead since 2018 as the two most recognized NGOs advancing global sustainable development.

% of Experts, Unprompted, Total Mentions, 2017–2019



Question

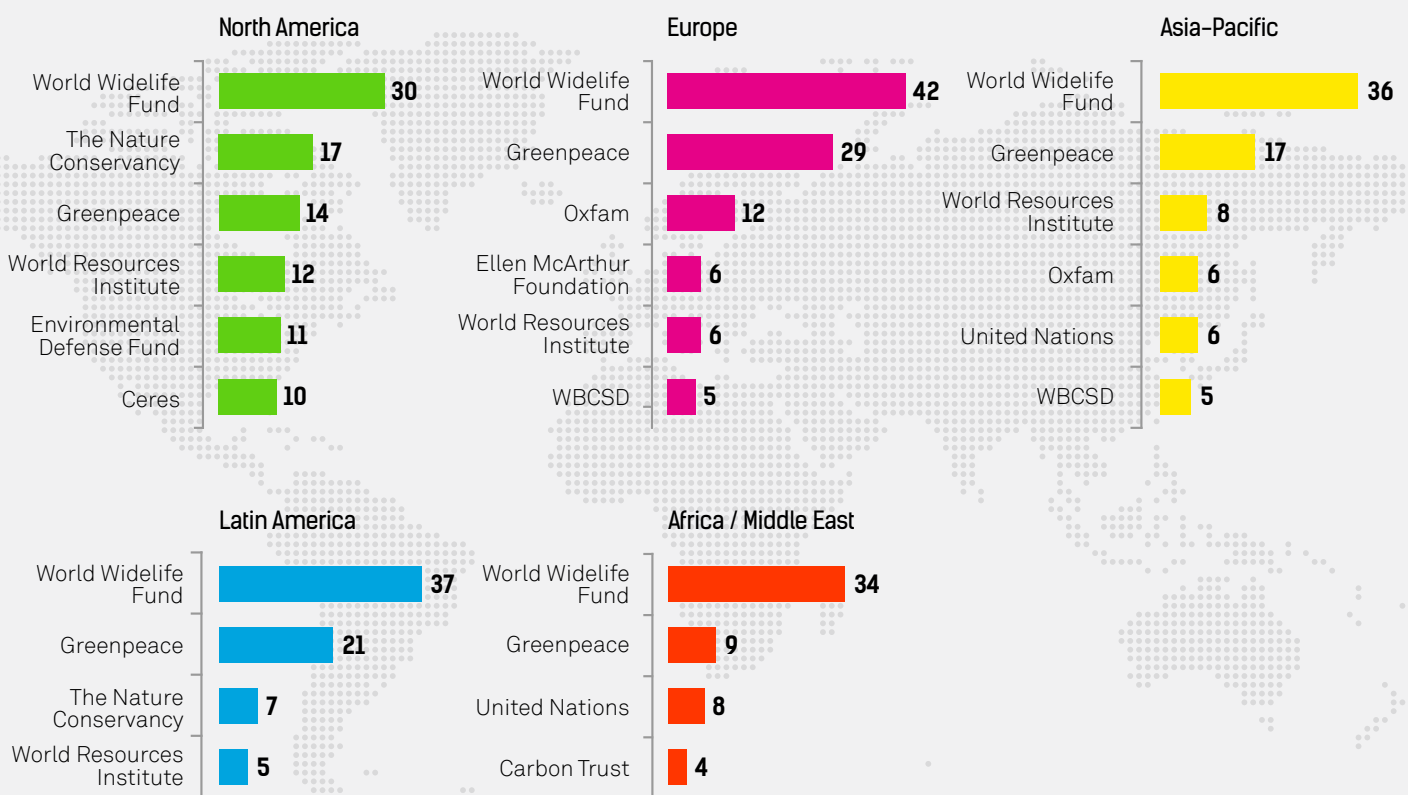
What specific NGOs do you think are leaders in advancing sustainable development?

Please enter a maximum of 3 NGOs in the spaces provided.

World Wildlife Fund Is Viewed as the Leading NGO Among Experts in All Regions

WWF holds a dominant position as the perceived leader in all regions, while Greenpeace also performs strongly. The World Resources Institute makes the top rankings in all regions except Africa/Middle East, while The Nature Conservancy is seen as a leading NGO in the Americas.

% of Experts, by Region, Unprompted, Total Mentions, 2019



Question

What specific NGOs do you think are leaders in advancing sustainable development?

Please enter a maximum of 3 NGOs in the spaces provided.

How Experts Define NGO Leadership

Collaboration and stakeholder engagement are seen as the key attributes that define NGO leaders, followed by advocacy, innovation, knowledge and a science-based approach.

% of Experts, Unprompted, Total Mentions, 2019



Question

Why do you think [NGO #1 from Q2] is a leader in advancing sustainable development?

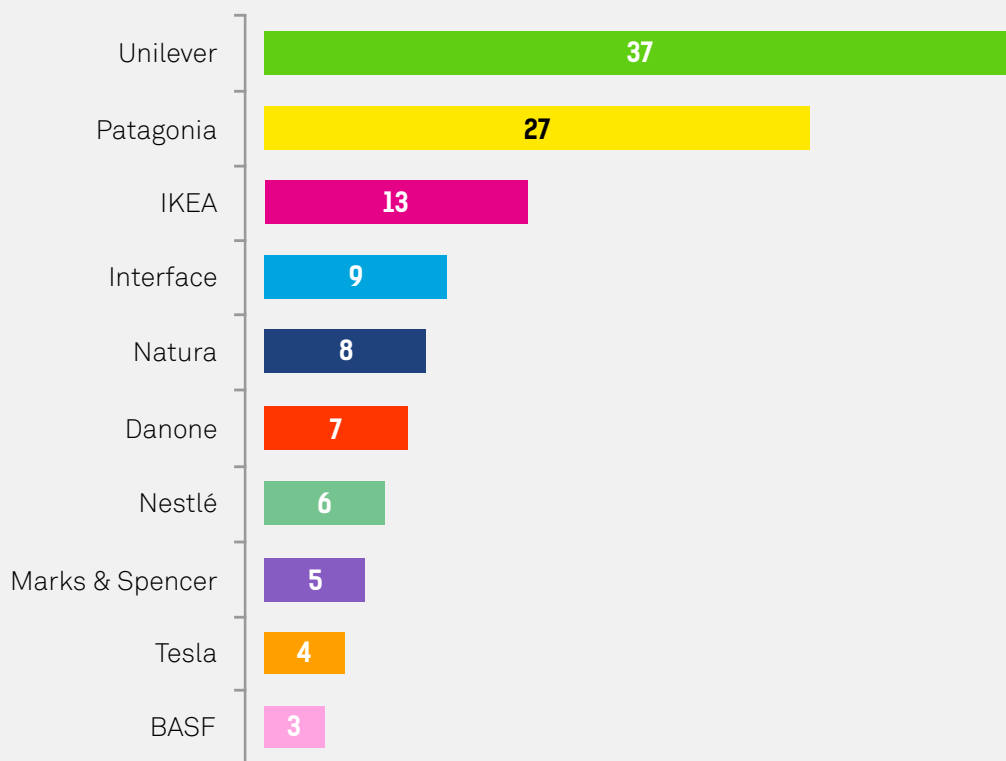
Please enter up to two responses in the spaces provided.

Corporate Leaders

Unilever, Patagonia and IKEA Are Most Recognized Global Leaders

Unilever, Patagonia and IKEA once again hold the top three positions in the top ten. A large majority of these are headquartered in Europe, with Natura being the only emerging market company to appear on the list of the highest-ranked companies. BASF has regained its position in the top ten after falling off the leaders list in 2018.

% of Experts, Unprompted, Total Mentions, 2019



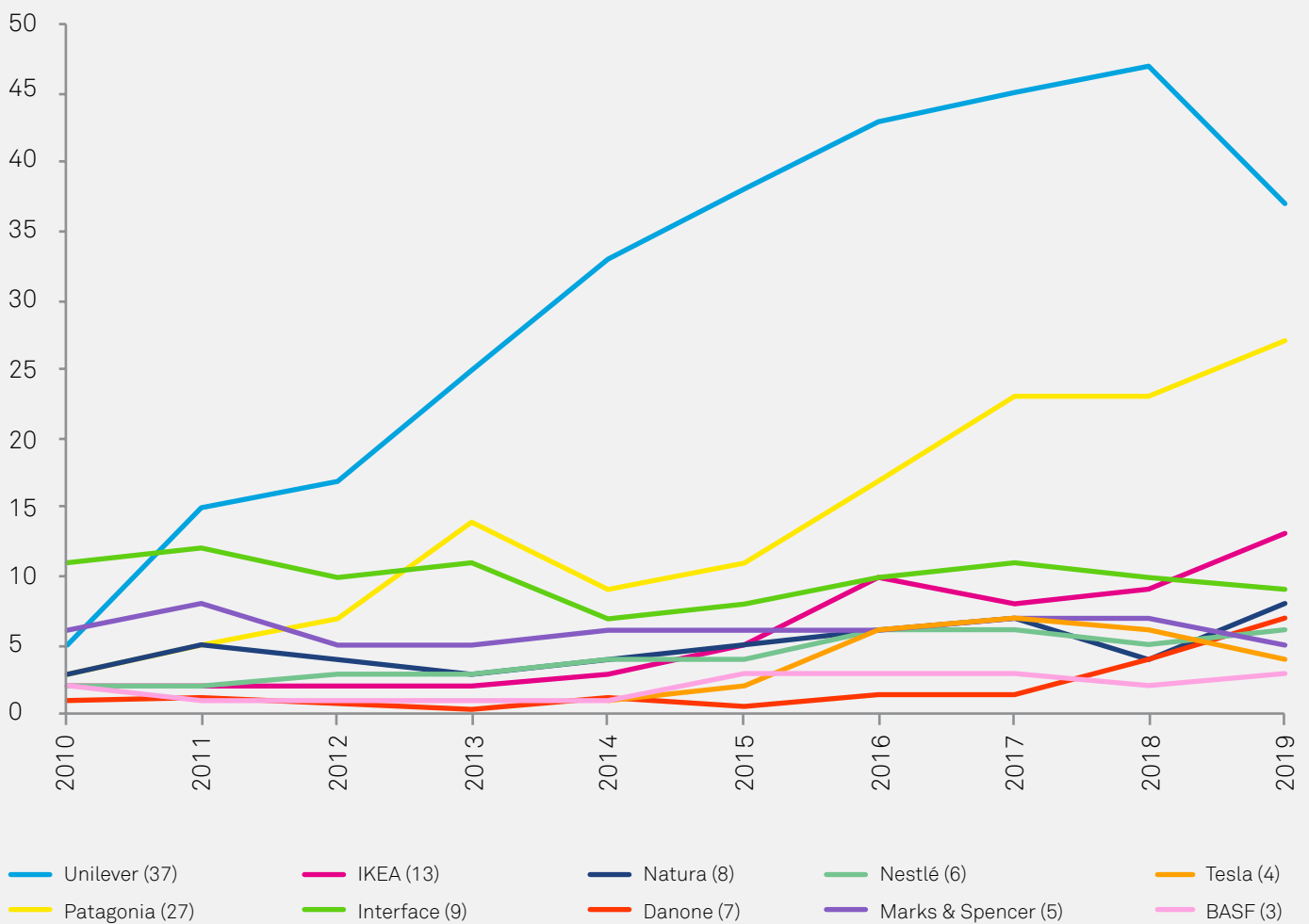
Question

What specific companies do you think are leaders in integrating sustainability into their business strategy? Please enter a maximum of 3 companies in the spaces provided.

The Leadership Gap Between Patagonia and Unilever has Narrowed

The degree to which experts perceive Patagonia to be a leader on sustainability is growing, while Unilever's ascendancy has declined this year for the first time. Recognition of efforts by IKEA, Natura and Danone has also increased.

% of Experts, Unprompted, Total Mentions, 2010–2019



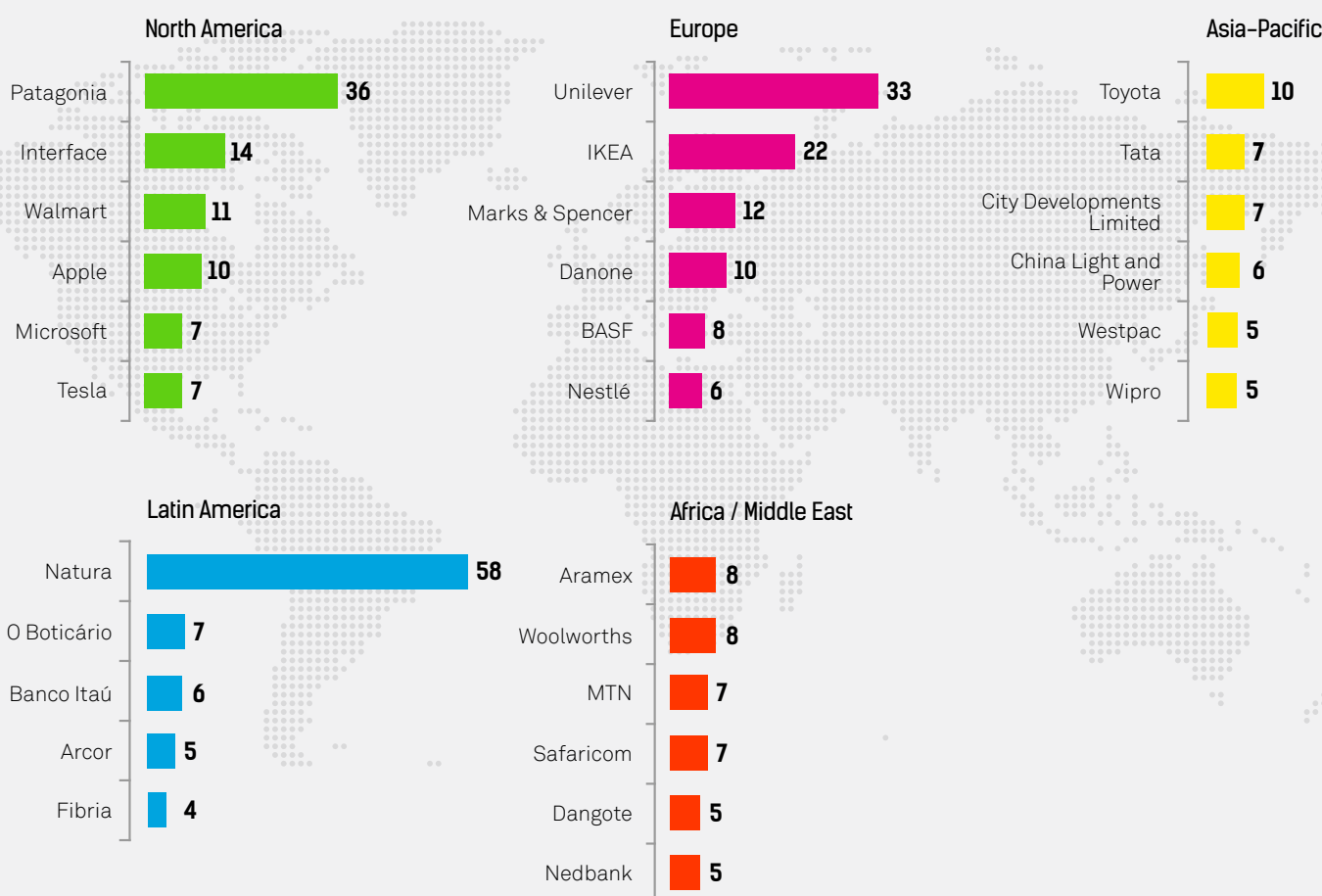
Question

What specific companies do you think are leaders in integrating sustainability into their business strategy? Please enter a maximum of 3 companies in the spaces provided.

Focus on Regional Leaders Shows Greater Diversity of Sustainability Leaders

When we asked experts to identify headquartered companies operating in their region, a number of companies are mentioned, broadening visibility on sustainability leadership. Experts in Latin America and North America elect Natura and Patagonia to the respective number one positions by a large margin.

% of Experts, by Region, Unprompted, Total Mentions, 2019



Question

Which companies headquartered specifically in [REGION] do you think are leaders in integrating sustainability into their business strategy? Please enter a maximum of 3 companies in the spaces provided.

How Experts Define Corporate Leadership

How Experts Define Corporate Leadership

Integrated sustainability values and having sustainability as part of the core business model are seen as the key drivers of sustainability leadership.

% of Experts, Unprompted, Total Mentions, 2019



Question

Why do you think [insert company #1 From Q2] is a leader in sustainable development?

Please enter up to two responses. Asked only to those who named at least one company in Q2.

How Experts Define Corporate Leadership, by Sector and Region

In Asia, Latin America and Europe, integrating sustainability into the core business model is seen as one of the most important leadership attributes, while in North America, executive leadership on sustainability is seen as a strong driver of company recognition.

	Most mentioned	2 nd most mentioned
Government	<ul style="list-style-type: none"> Supply chain management 18% 	<ul style="list-style-type: none"> Ambitious targets/policies/commitment to SDGs Communication/reporting/advocacy Part of core business model/strategic approach 15% each
NGO	<ul style="list-style-type: none"> Sustainable products/services/production 20% 	<ul style="list-style-type: none"> Part of core business model/strategic approach 13%
Academic/ research	<ul style="list-style-type: none"> Integrated sustainability values 15% 	<ul style="list-style-type: none"> Ambitious targets/policies/commitment to SDGs 12%
Corporate	<ul style="list-style-type: none"> Part of core business model/strategic approach 19% 	<ul style="list-style-type: none"> Executive leadership has strong SD values/strong leadership Part of core business model/strategic approach 17% each
Service/media	<ul style="list-style-type: none"> Part of core business model/strategic approach 19% 	<ul style="list-style-type: none"> Integrated sustainability values 15%
Africa/ Middle East	<ul style="list-style-type: none"> Ambitious targets/policies/commitment to SDGs Integrated sustainability values 16% each 	
Asia-Pacific	<ul style="list-style-type: none"> Integrated sustainability values Part of core business model/strategic approach 16% each 	
Europe	<ul style="list-style-type: none"> Part of core business model/strategic approach 19% 	<ul style="list-style-type: none"> Integrated sustainability values 17%
Latin America	<ul style="list-style-type: none"> Part of core business model/strategic approach Sustainable products/services/production 17% each 	
North America	<ul style="list-style-type: none"> Executive leadership has strong SD values/strong leadership Integrated sustainability values 17% each 	

Question

Why do you think [insert company #1 From Q2] is a leader in sustainable development?

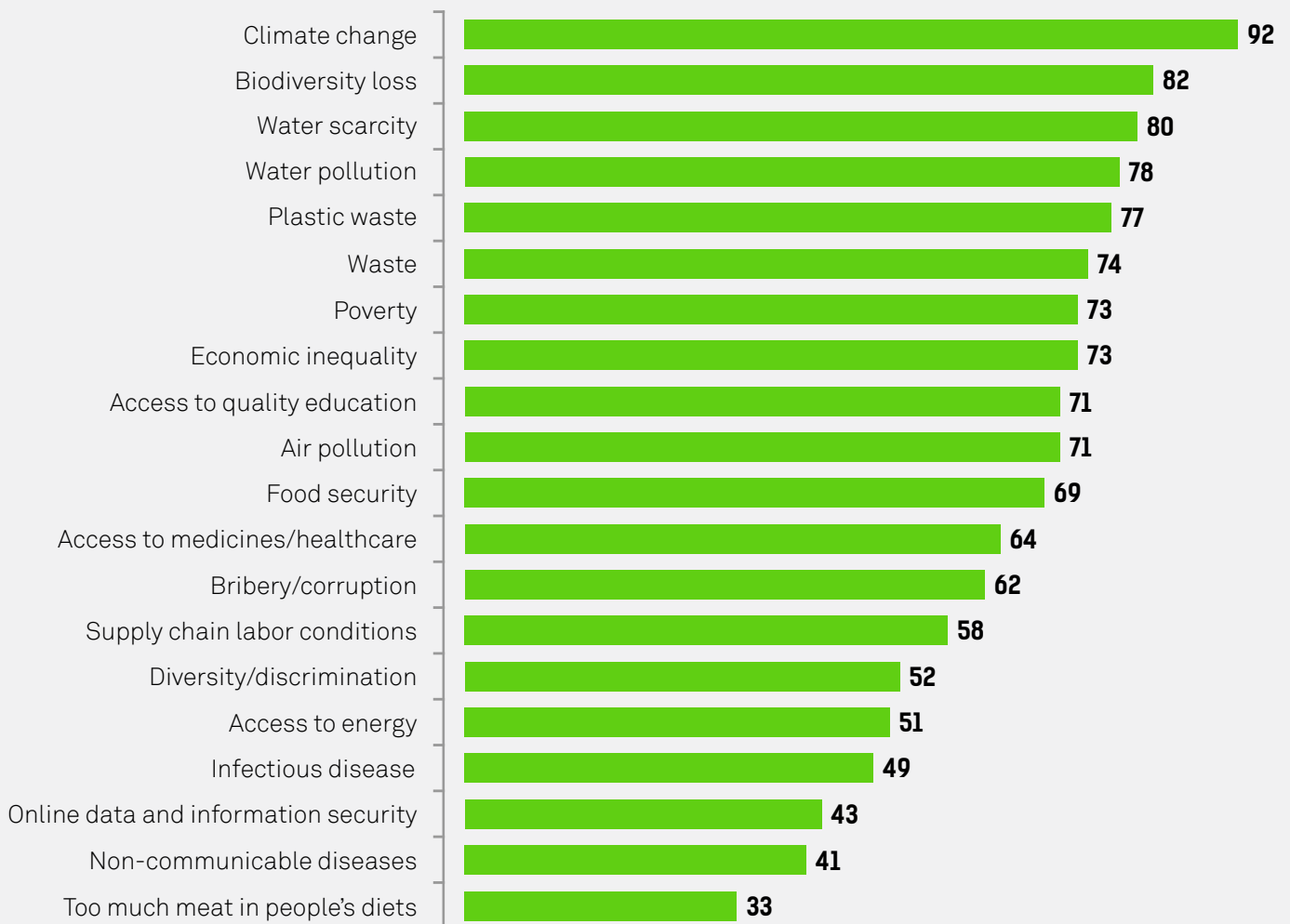
Please enter up to two responses. Asked only to those who named at least one company in Q2.

Urgency of Sustainable Development Challenges

Climate Change and Biodiversity Loss are Seen as Most Urgent Challenges

Environmental issues such as climate change, biodiversity loss, water scarcity, water pollution and waste dominate the list of perceived most urgent sustainability challenges facing the global community. Poverty and economic inequality are seen as the most urgent social challenges facing society among the issues put forward.

% of Experts, "Very urgent" (4+5), 2019



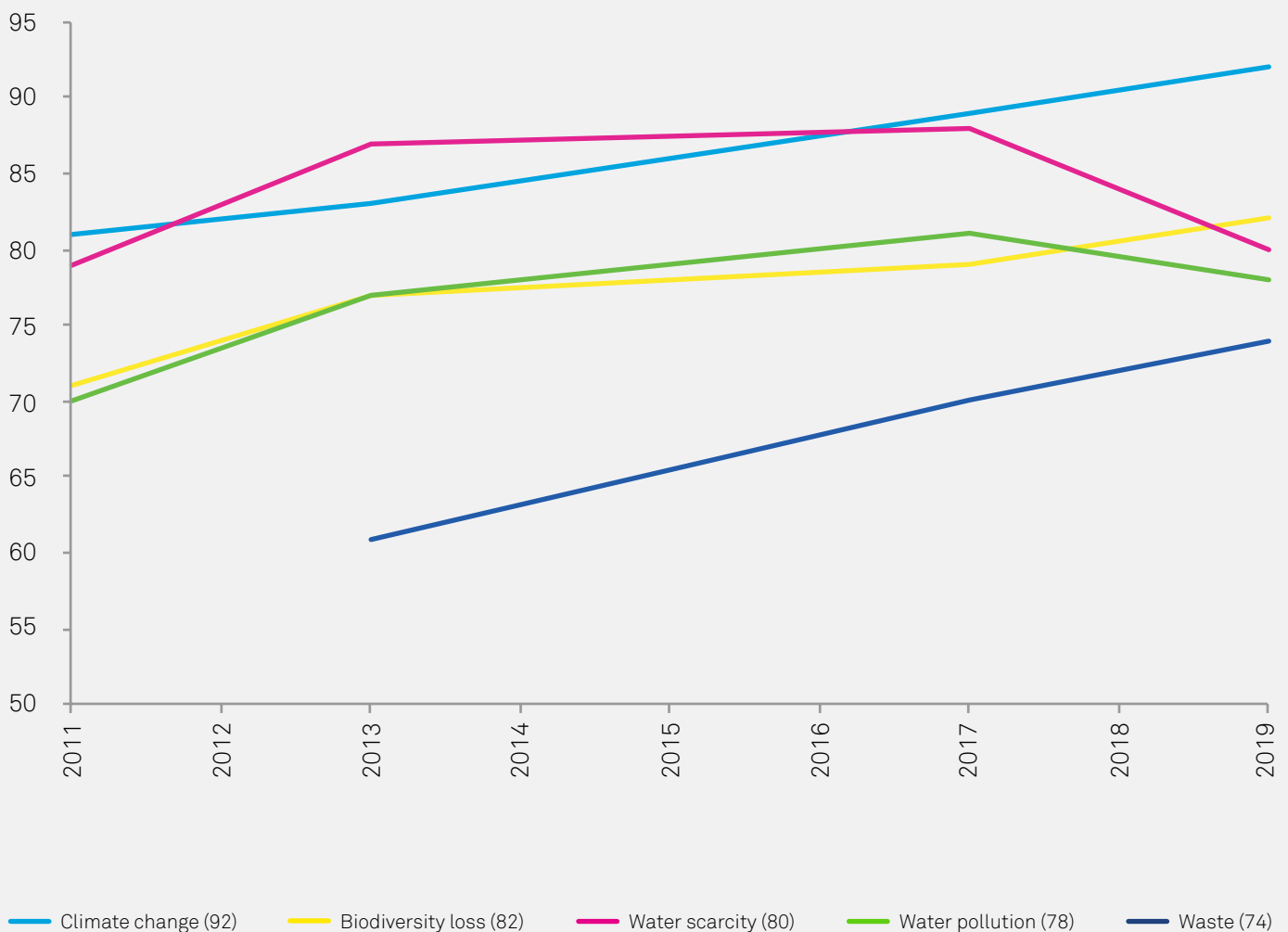
Question

Considering society's numerous sustainable development challenges, please rate the urgency of each of the following: *Please use a scale of 1 to 5 where 1 means "not urgent at all" and 5 means "very urgent".*

Growing Concern with Climate Change, Biodiversity Loss and Waste

Climate change, biodiversity loss and waste are growing concerns for global experts, while perceived urgency of water scarcity and water pollution have declined slightly since 2017.

% of Experts, "Very urgent" (4+5), 2011–2019



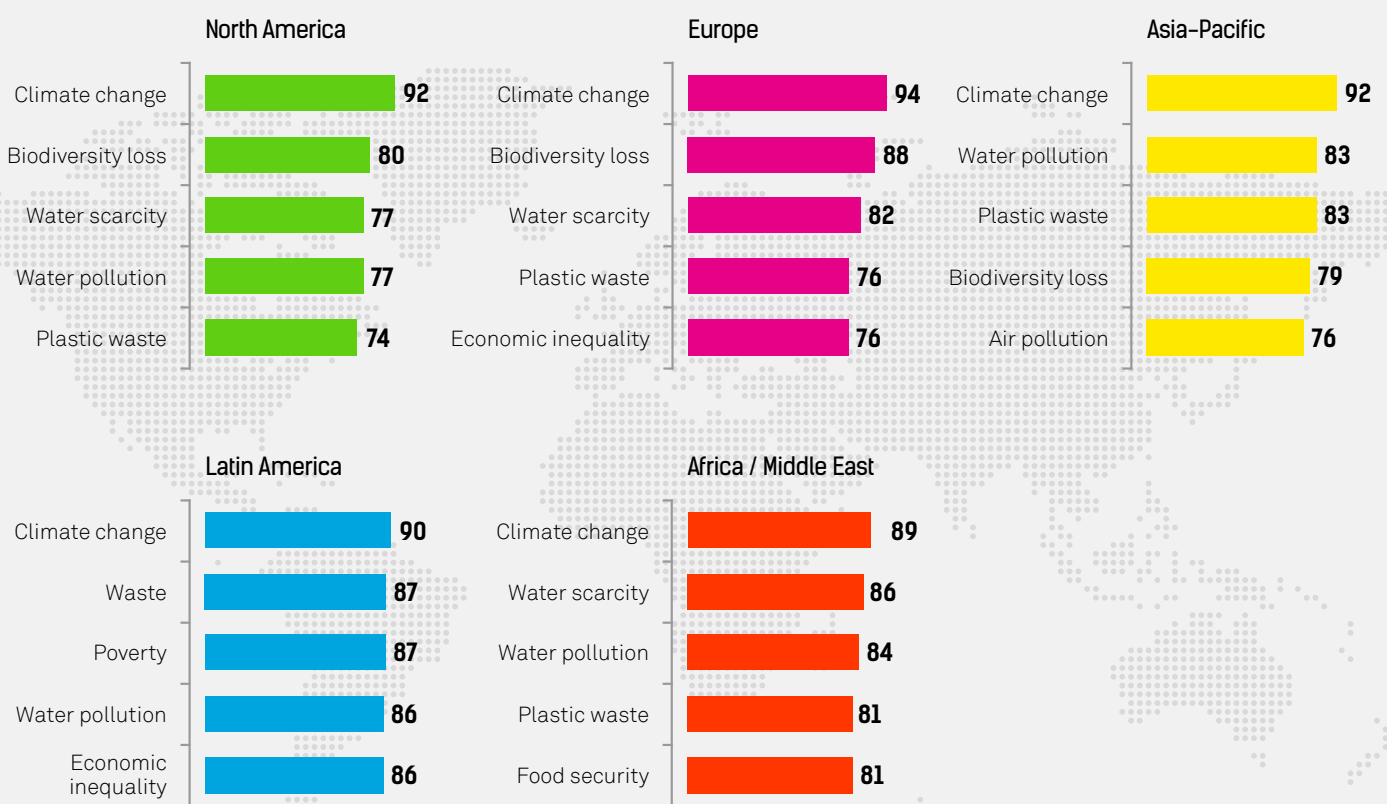
Question

Considering society's numerous sustainable development challenges, please rate the urgency of each of the following: *Please use a scale of 1 to 5 where 1 means "not urgent at all" and 5 means "very urgent".*

Climate Change Is Rated as Most Urgent Issue across All Regions

Experts in all global regions rate climate change as the most urgent issue facing the global community. In Europe and North America, biodiversity loss is also perceived as particularly critical, while waste and water issues are seen as more significant challenges in Asia-Pacific, Latin America and Africa/Middle East.

% of Experts, "Very urgent" (4+5), by Region, 2019



Question

Considering society's numerous sustainable development challenges, please rate the urgency of each of the following: *Please use a scale of 1 to 5 where 1 means "not urgent at all" and 5 means "very urgent".*

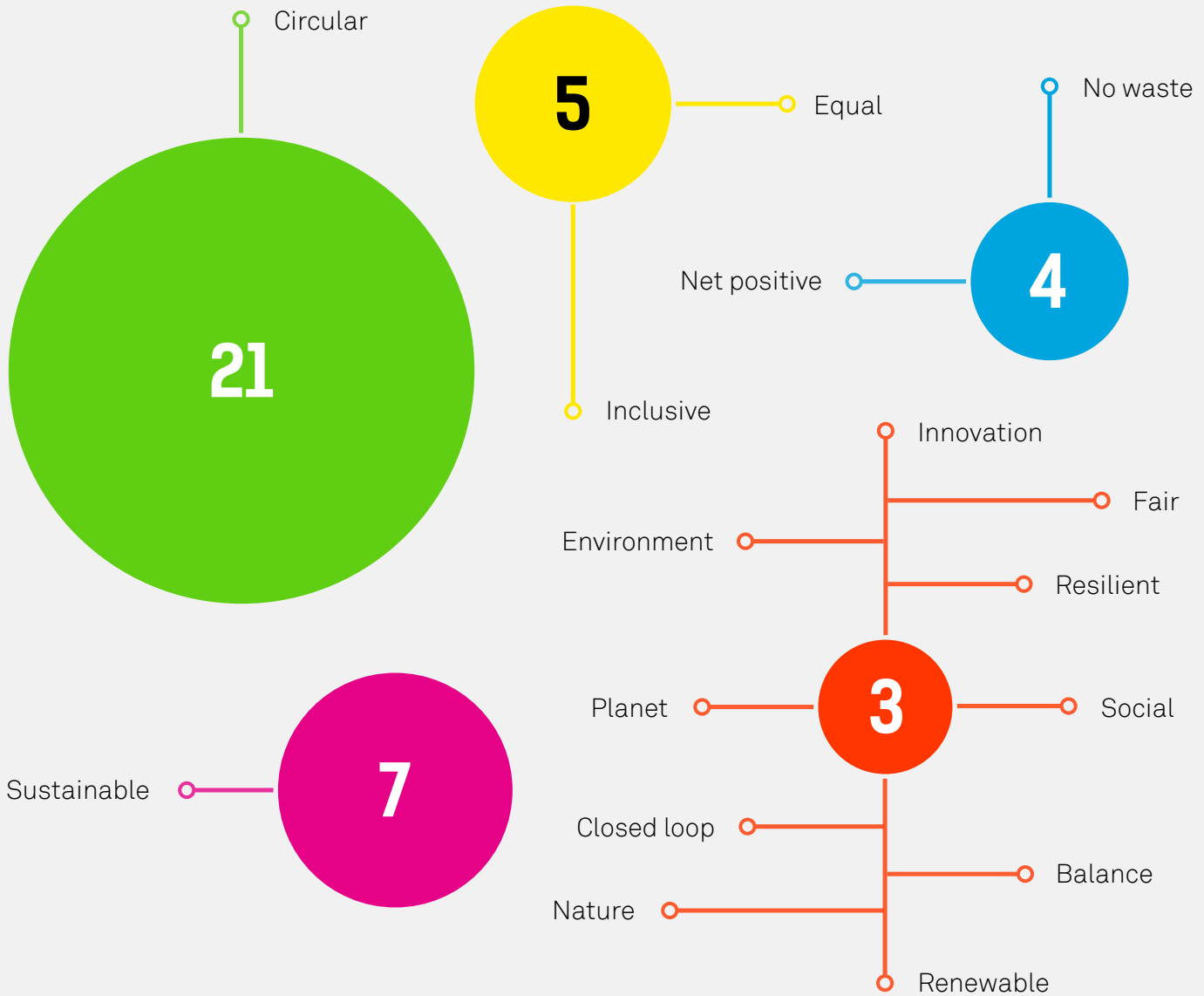
Describing the Regenerative Economy



How Experts Describe a Future Regenerative Economy

Experts Tend to Associate Regenerative with Circular and Sustainability the most.

% of Experts, Total Mentions, 2019



Question

In order to transition to sustainable development and achieve the Sustainable Development Goals (SDGs), the economy needs to significantly change to become more regenerative.

What words or phrases would you use to best describe a future “regenerative” economy?

How Experts Describe a Future Regenerative Economy: Select Quotes

“ Holistic Processes

“While sustainability focuses on development today that protects the ability of future generations to develop, the priority of regenerative development is to apply holistic processes to create feedback loops between physical, natural, economic and social capital that are mutually supportive.” - **Corporate, Nigeria**

“ Engagement economy

“One in which attention is paid to using only what we need and not accumulating things that will quickly be discarded. Business needs to offer services and more personal engagement in a process that benefits everyone. Deeper understanding of systems thinking and not seeing it as a loss of quality of life but something that is better.” - **Academic/Research, UAE**

“An engagement economy, where services overtake products as a means for generating revenue. A regenerative economy, where businesses are closed loop and zero waste, with a carbon footprint to deliver on the Paris agreement.” - **Corporate, US**

“ Regeneration

“Developing and implementing ways to rebuild our ecosystems, bringing back the systemic equilibrium and richness that’s needed for the planet to thrive. We need to regenerate degraded ecosystems. The good news is that new technologies are coming that may make this possible. We need to push on all fronts, the technological, the economic/financial, and political in order to make this shift.” - **Service, Indonesia**

“ Equality

“Equal access to opportunities, avoiding corruption and opening opportunities to the most disadvantaged. Encouraging innovation across the board, inclusive of all key influential and meaningful stakeholders that have a true and genuine sense of purpose.” - **Corporate, Brazil**

Question

In order to transition to sustainable development and achieve the Sustainable Development Goals (SDGs), the economy needs to significantly change to become more regenerative.

What words or phrases would you use to best describe a future “regenerative” economy?

How Experts Describe a Future Regenerative Economy: Select Quotes

🗨️ Beyond Profit

“Inclusive growth, placing importance on people and planet beyond profit.” - **NGO, Thailand**

“A future regenerative economy is one that contributes to “well-being” and would focus on people, planet and profit in a cycle of empowered participation.” - **Government, Canada**

“A new innovative approach to how we organize our economy. Shareholder value and the next quarterly financial report should be the number one priority - companies need to be creating value for all stakeholders and considering long term value creation. We need to live within environmental limits. We need a more equal society, the power of big corporations needs to be given back to the people, they are there for us, not the other way around.” - **NGO, Sweden**

“This is the first time I have read the term, ‘regenerative’ economy. I believe the economy should return to focusing on improving the quality of life for all people. In order to do this we need renewed focus on basic services - education, health - and making sure everyone has their basic needs fulfilled.” - **Services, Bangladesh**

🗨️ Limits to growth

“I like the term, ‘minimum’ economy. ‘Sustainability’ does not necessarily convey a sense of limitations to development and growth, also ‘circularity’ does not necessarily assure disadvantaged communities will have their basic needs for food, water, healthcare, education and shelter met. I suggest the term ‘minimum’ in order to convey the clear idea that everybody (poorest and richest) must adapt their development expectations in order to allow everyone to live in a dignified manner. A small percentage of the global population living in excess and opulence has impacted the environment and increased social inequality. This ‘minimum’ standard of living may advance in time as social inequalities are reduced.” - **Academic/Research, Mexico**

🗨️ Circularity

“A circular economy that produces more environmental and social capital than it consumes.”
- **Corporate, France**

Question

In order to transition to sustainable development and achieve the Sustainable Development Goals (SDGs), the economy needs to significantly change to become more regenerative.

What words or phrases would you use to best describe a future “regenerative” economy?

Further Information

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