



The 2018

GlobeScan-SustainAbility Leaders Survey



Contents

- 03** About The GlobeScan–SustainAbility Survey
- 04** Introduction
- 06** Survey Methodology
- 07** Key Findings
- 09** Institutional Leaders
- 13** NGO Leaders
- 17** Corporate Leaders
- 23** How Experts Define Corporate Leadership
- 26** Company Performance on Pre-Defined Leadership Attributes
- 28** How Young Adults Can Influence the Sustainability Agenda
- 31** Conclusion
- 32** Further Information



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 and Net Impact for their contributions to this research.



Introduction

The 2018 GlobeScan-Sustainability Leaders Survey shows Unilever's top ranking among global experts for strong sustainability leadership continuing. Meanwhile, Interface, the only company to place in the Leaders Survey every year since inception, extended its unbroken run among the most admired companies for yet another year. Finally, Walmart has returned to the Leaders Survey highest echelon after a multi-year absence, while Apple and Danone have debuted among the most recognized companies.

For a remarkable eighth year in a row, Unilever is ranked as the leading global corporate sustainability leader, receiving close to half the total mentions by experts. Unilever is the most dominant private sector leader in the history of the GlobeScan-Sustainability Leaders Survey, with its margin of leadership expanding every year since it first appeared in the number one position in 2011. Patagonia and Interface occupy the second and third positions in the ranking as they did in 2017, after which IKEA, Marks & Spencer, Tesla, Nestlé, Natura, Danone, Apple and Walmart round out the list of highest-ranked companies.

"For the eighth year in a row, Unilever is ranked as the top global corporate sustainability leader, mentioned by 47 percent of experts."

Continuing the trend of the last few years, most high-ranked companies are consumer-facing brands. It is notable that Walmart returned to the top cohort of companies in 2018; Walmart last appeared amongst the leaders in 2013. For Danone and Apple, this is the first time they have been included in this distinguished group.

The 2018 Leaders Survey reveals that integrating sustainability values, making sustainability part of the core business model and committed executive leadership are the key characteristics recognized by expert respondents as defining corporate leadership.

Among NGOs, WWF and Greenpeace retain their dominant positions as the two most widely recognized NGOs. They are perceived even more positively by younger experts aged 18-35, which may harbor well for their enduring future strength.

For the first time in 2018, expert respondents were asked to assess how well leading companies perform against five key leadership attributes – Purpose, Plan, Culture, Collaboration and Advocacy – as defined in detail in a new book, *All In: The Future of Business Leadership*, written by GlobeScan co-CEO Chris Coulter and SustainAbility Executive Director Mark Lee with David Grayson of the Cranfield School of Management. While the book argues the interdependence of the five aspects is critical to business success and sustainability progress, the authors and survey respondents agree that Advocacy is today the least developed of the attributes, while Plan is the most mature. See more at allinbook.net.

“The impact of multi-sector partnerships and collaborations on the sustainable development agenda is perceived to have steadily improved since 2015”

A new question in the 2018 Leaders Survey asked how young adults (defined as those aged 18 to 35) can best influence progress on the sustainable development agenda. All Leaders Survey respondents agree that consumer behavior and political participation are the most promising ways for this cohort to have influence. Interestingly though, 18-35 year olds and those 36+ differ in their opinions on the potential efficacy of other actions. Young experts are more likely to view entrepreneurship, career and education choices, investment decisions and advocacy as more important to advancing the sustainable development agenda than experts 36+, while those experts 36 and older rate influencing employers and volunteerism higher than their younger peers.

While the top cohort of companies represents an inspiring snapshot of leadership today, the greatest opportunity to advance private sector influence on sustainable development lies with the tens of thousands of global corporations that have not yet made it onto this list. We hope that the 2018 Leaders Survey motivates more companies to define their own strategy and act decisively to advance sustainability. Regardless their size, every company and every business leader has the potential to drive meaningful impact on the global stage. What is needed most is a vast expansion of the number of companies seriously engaging sustainability opportunities and challenges, and reinventing their business models to give themselves the greatest chance of enduring future success.

Survey Methodology

729 qualified sustainability experts completed the online questionnaire from April 9th to May 15th, 2018.

Sectors

Respondents were drawn from the following sectors:



5%
Government



23%
Service & Media



16%
Academic & Research



36%
Corporate



15%
NGO



6%
Other

Geography

Experts surveyed span 70 countries in the following regions:



30%
North America



37%
Europe



20%
Asia-Pacific



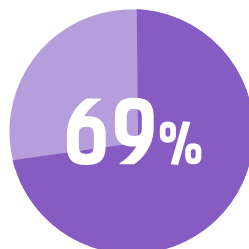
8%
Latin America



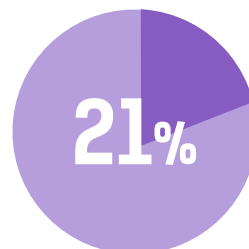
6%
Africa

Experience

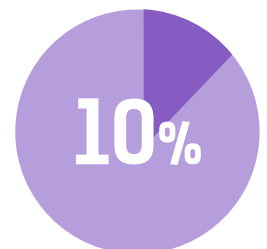
Respondents have the following experience working on sustainability issues:



More Than 10
Years



5 to 10
Years



3 to 4
Years

Key Findings

- For the eighth year in a row, Unilever is ranked as the top global corporate sustainability leader, mentioned by 47 percent of experts. Patagonia and Interface occupy the second and third positions, listed by 23 percent and 10 percent of experts, respectively. IKEA, Marks & Spencer, Tesla, Nestlé, Natura, Danone, Apple and Walmart were each mentioned by at least 3 percent of experts.
- Integrating sustainability values, making sustainability part of the core business model and strong executive leadership are the leading means by which expert respondents decide which companies to award top ranking.
- Respondents were asked to determine how well leading companies perform against each of five key leadership attributes – Purpose, Plan, Culture, Collaboration and Advocacy (as defined in the recently released book, *All In: The Future of Business Leadership*). Expert respondents agreed that companies currently are most advanced on Plan and are weakest on Advocacy.
- Unilever and Patagonia perform strongly in all global regions, while Interface appears in the top cohort of companies in a majority of regions.
- WWF and Greenpeace continue to be seen as the global NGO leaders. They are viewed particularly favorably by younger experts, those aged 18-35. World Resources Institute and Oxfam rank third and fourth among NGOs respectively, with the latter somewhat less likely to be named a leader than in 2017.

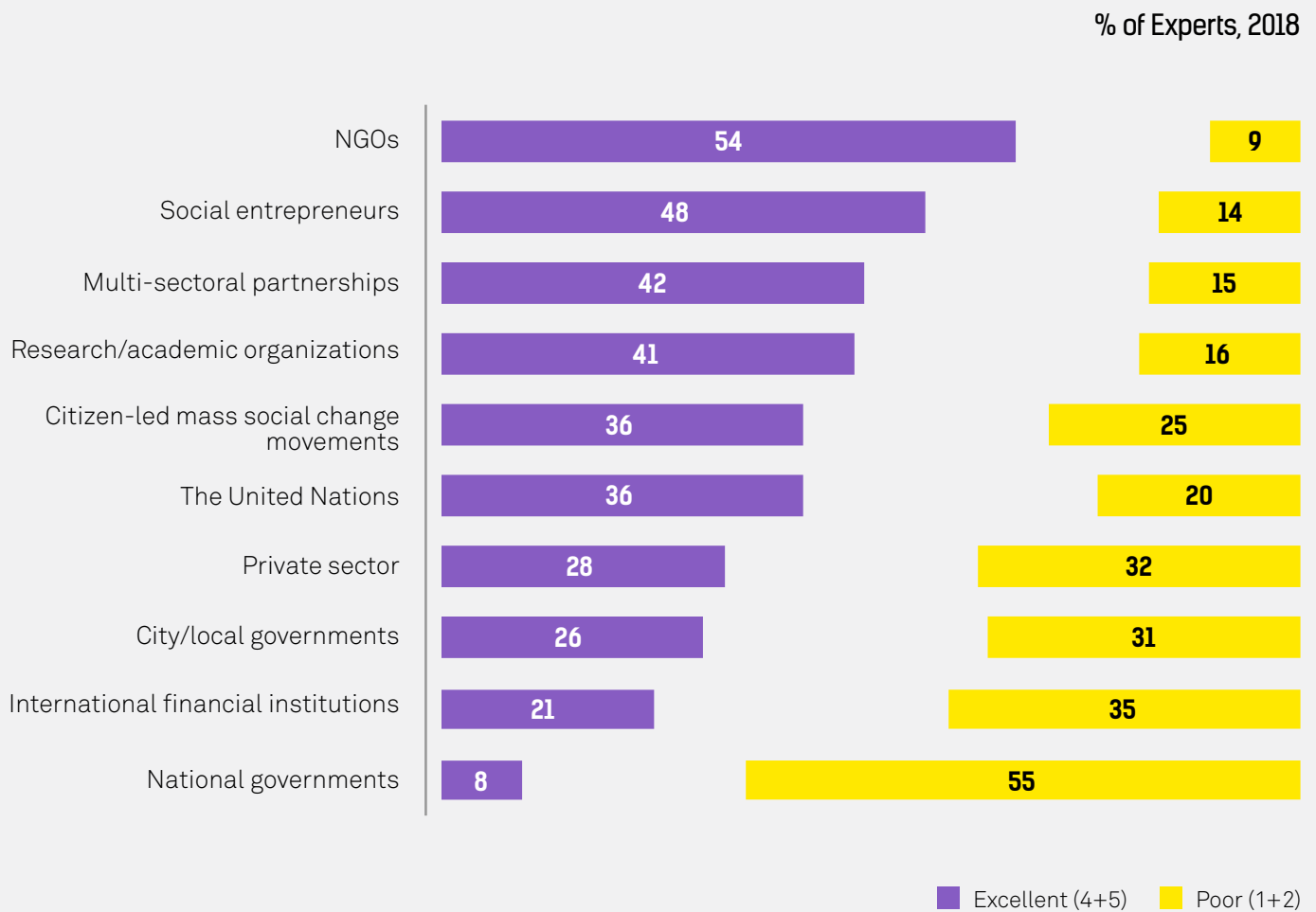
- **The impact of multi-sector partnerships and collaborations on the sustainable development agenda is perceived to have steadily improved since 2015.** Overall perceptions of the private sector contribution to sustainable development have also improved since 2016, during which time international finance institutions have seen a moderate increase in perceived favorability as well. Conversely, the perceived impact of research/academic institutions declined between 2017 and 2018.
- **Leaders Survey respondents are unanimous in their agreement that consumer behavior and political participation are the key pathway for young people to advance global sustainability.** However 18-35 year olds and those 36+ had differing views about the potential impact of other forms of influence. Older experts 36+ rate influencing employers and volunteerism higher than their younger peers do. Young experts see entrepreneurship, career and education choices, investment decisions and advocacy as more important to making headway on global sustainability than older experts.

Institutional Leaders



Institutional Leaders

NGOs and social entrepreneurs are seen to have contributed the most to advancing the sustainable development agenda. The performance of governments and international financial institutions is seen as poor, while experts are divided on the performance of the private sector.



Question

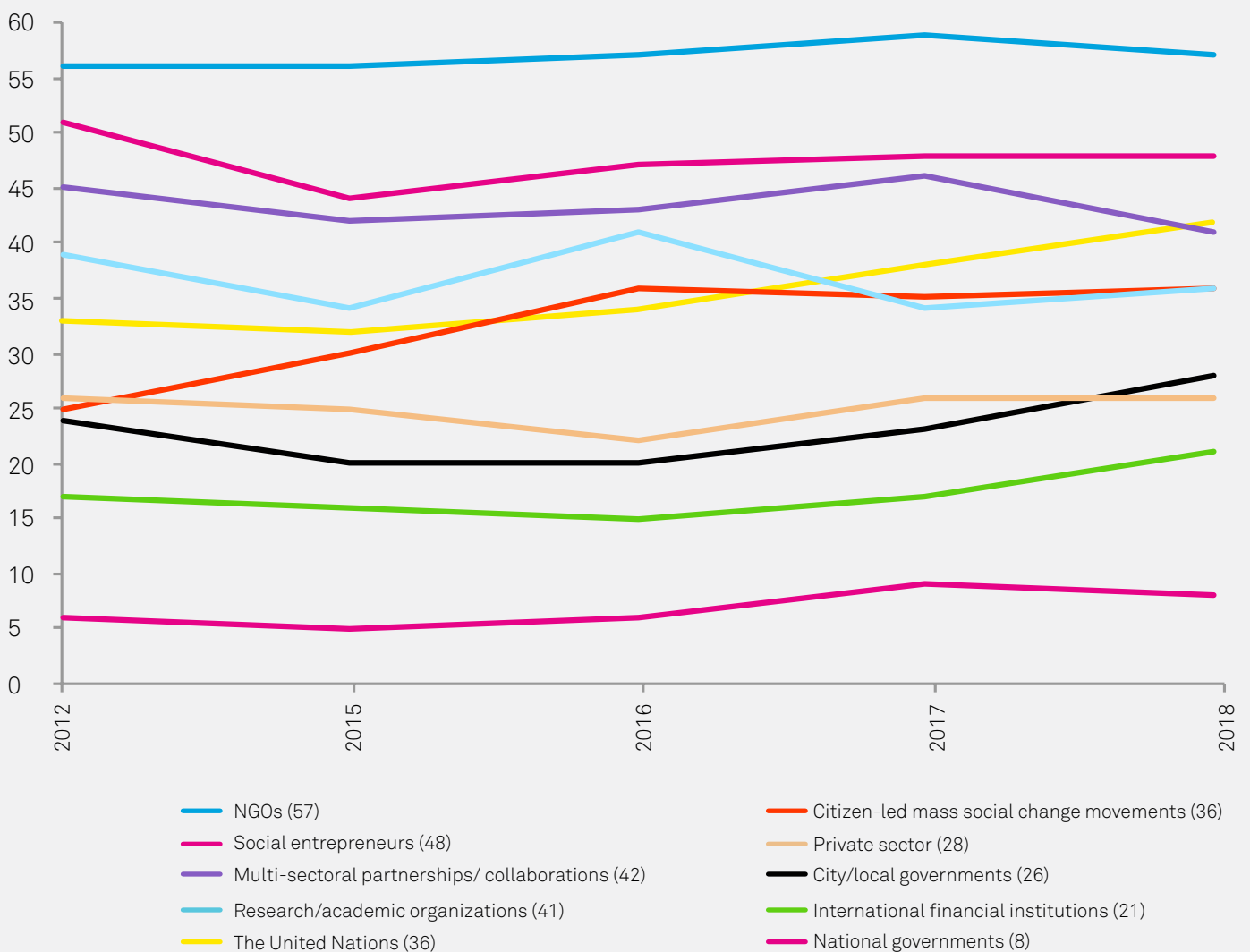
How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

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

Institutional Leaders

There have been only subtle shifts in perceptions of key institutions since 2012. NGOs have been consistently seen as leaders by experts, while national governments, international financial institutions and the private sector have been perceived as performing poorly.

% of Experts, "Excellent" (4+5), 2012–2018



Question

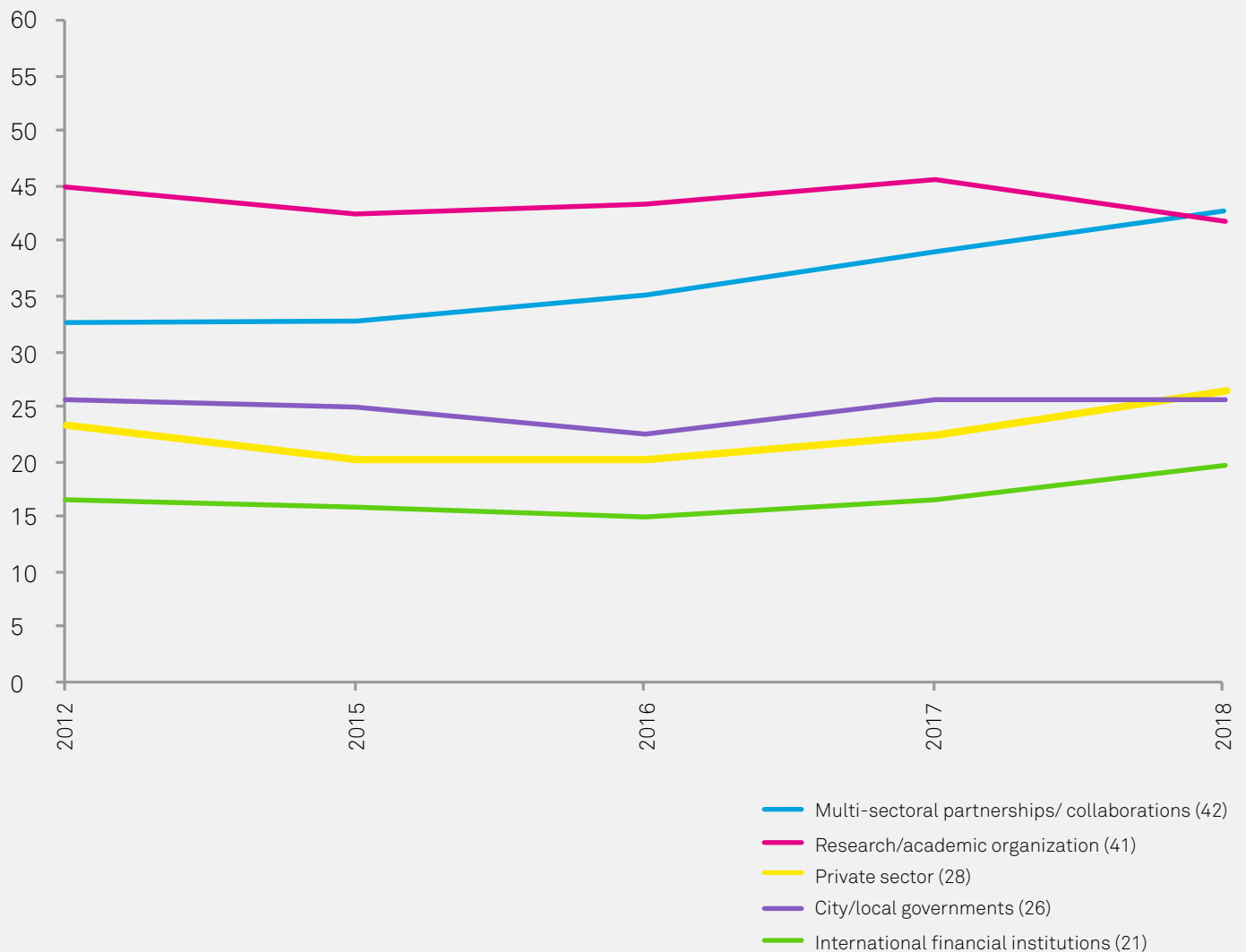
How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

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

Institutional Leaders

Multi-sector partnerships/collaborations and the private sector have seen steady improvement in recent years, while research/academic organizations perceived performance has fallen.

% of Experts, "Excellent" (4+5), 2012–2018



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".

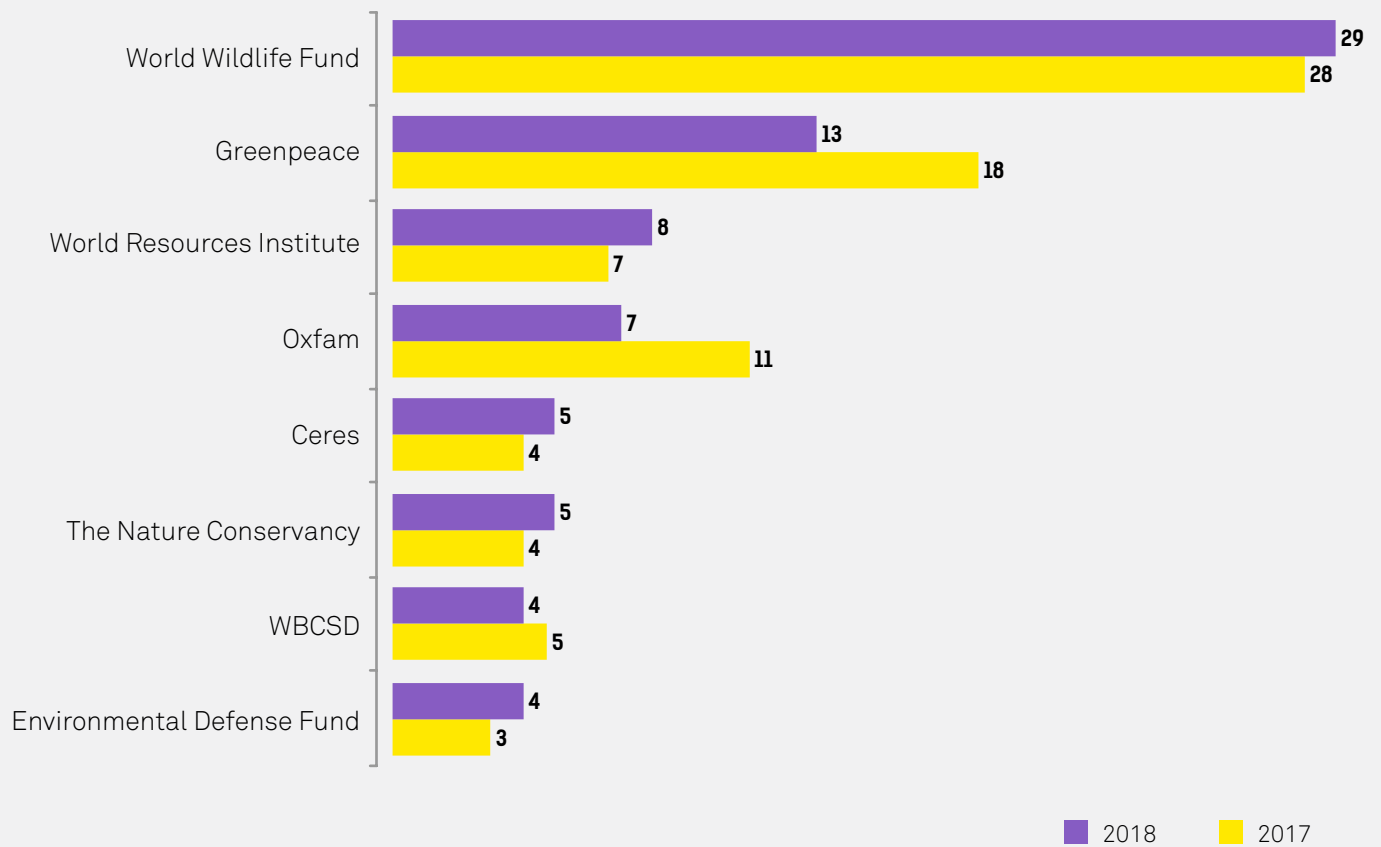
NGO Leaders



NGO Leaders

WWF and Greenpeace continue to be seen as the two key global NGO leaders. Both Greenpeace and Oxfam have seen moderate reductions in their scores, compared to 2017 data.

% of Experts, Unprompted, Total Mentions, 2017–2018



Question

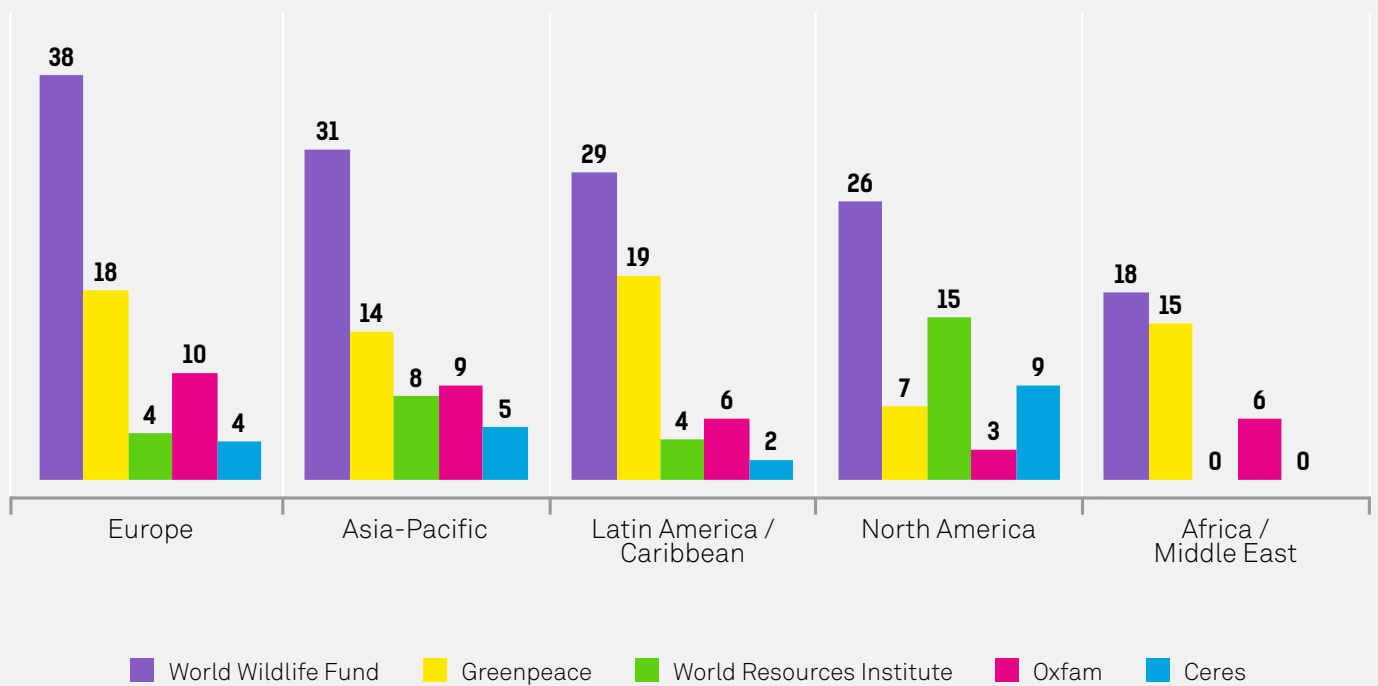
What specific NGOs do you think are leaders in advancing sustainable development?

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

NGO Leaders

WWF is the most widely recognized NGO across all regions. Greenpeace is firmly in second place in every region except North America, where World Resources Institute takes the number two position.

% of Experts, Unprompted, Total Mentions



Question

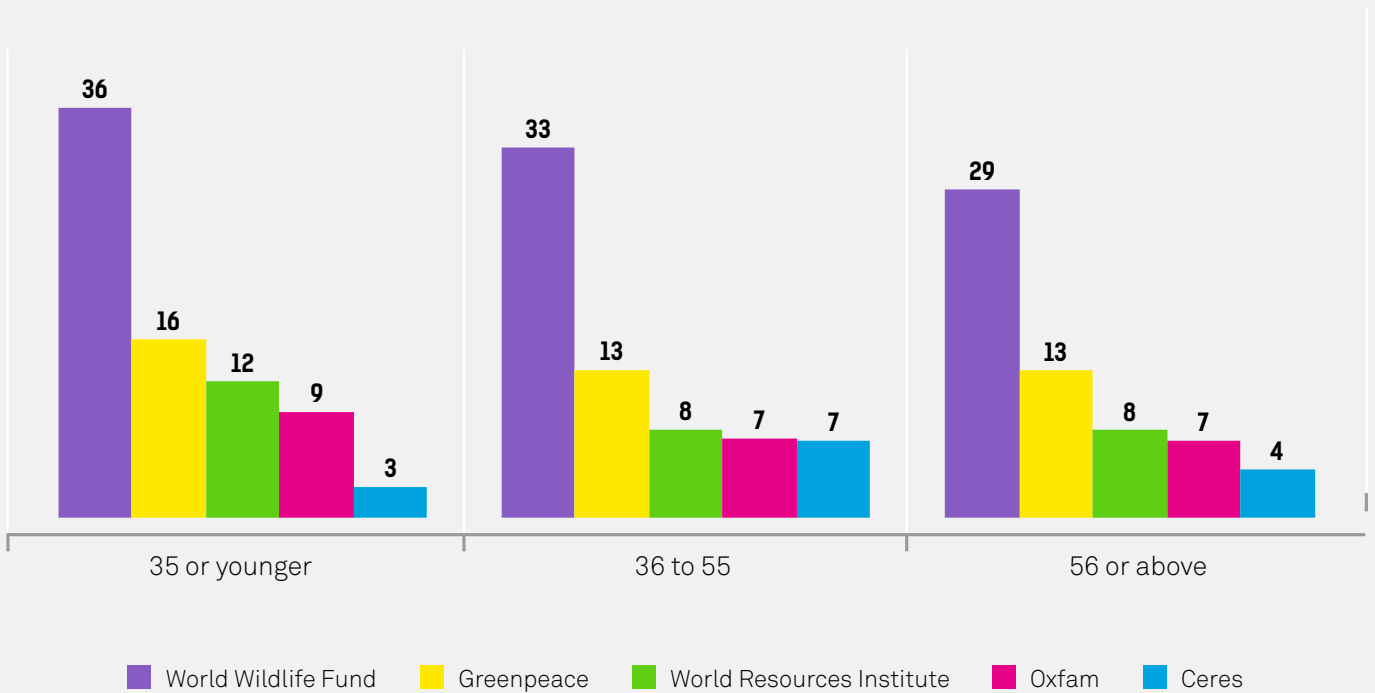
What specific NGOs do you think are leaders in advancing sustainable development?

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

NGO Leaders

Younger generations are slightly more likely to recognize large NGOs than are older experts.

% of Experts, Unprompted, Total Mentions



Question

What specific NGOs do you think are leaders in advancing sustainable development?
Please enter a maximum of 3 NGOs in the spaces provided.

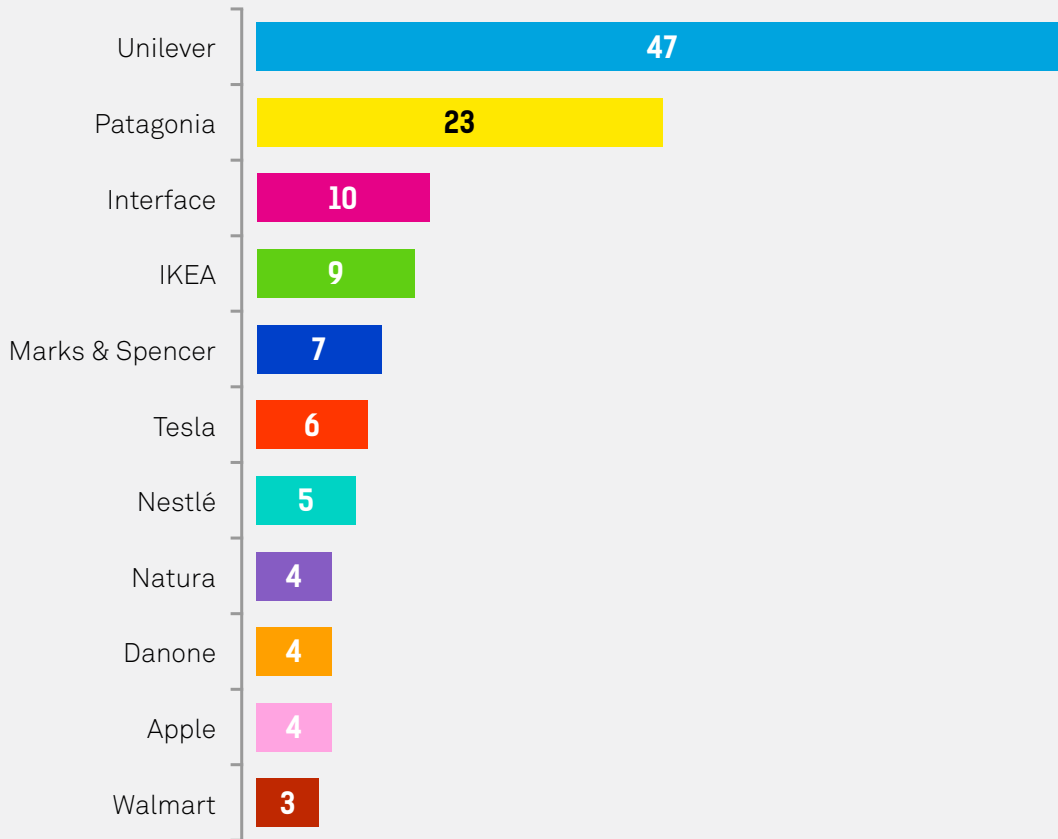
Corporate Leaders



Corporate Leaders

Unilever retains the number one leadership position, followed by Patagonia and Interface. The top cohort of leadership companies continue to be dominated by consumer facing companies.

% of Experts, Total Mentions, Unprompted, 2018

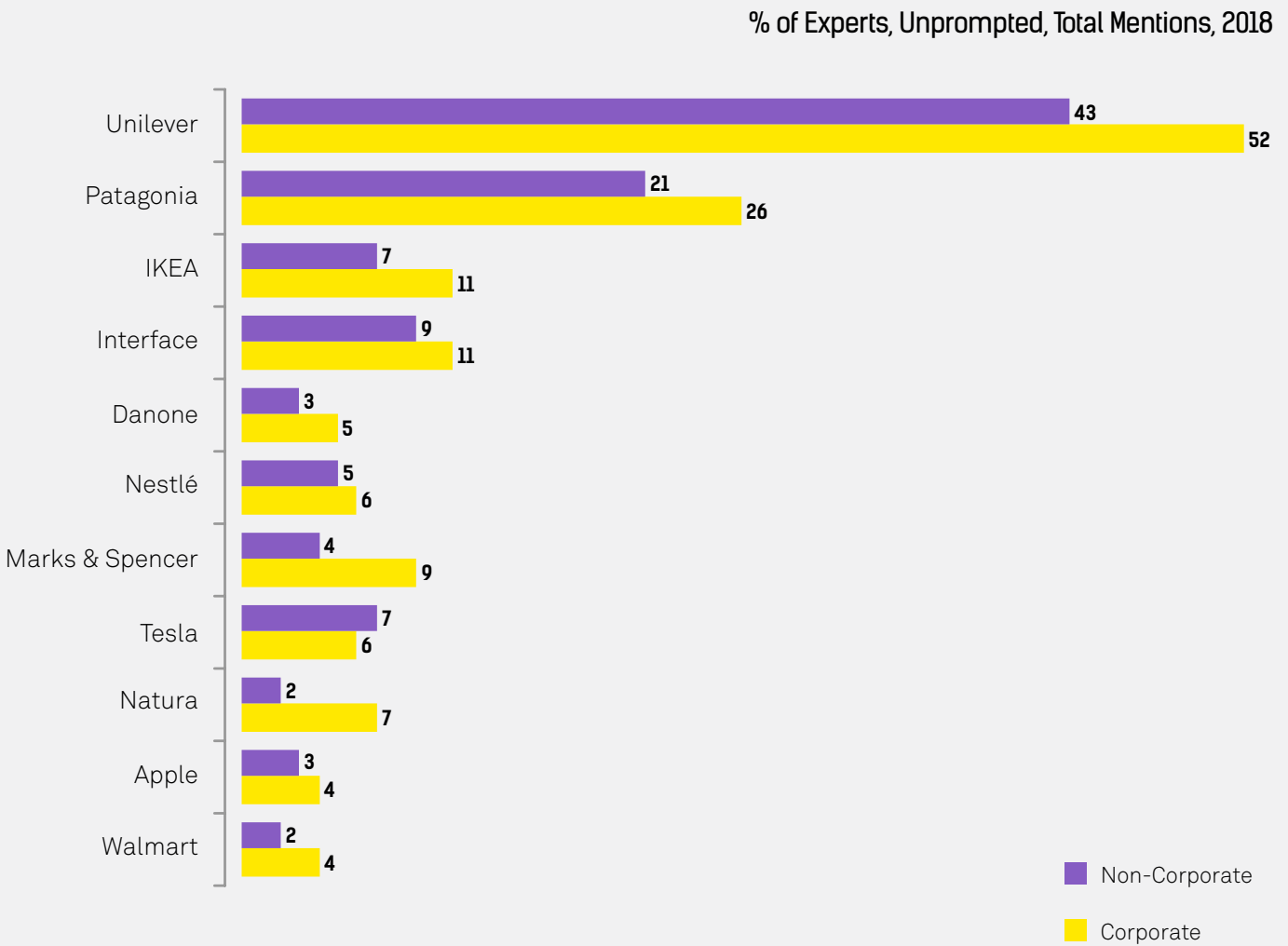


Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Corporate Leaders: Corporate vs. Non-Corporate Respondents

Corporate respondents are more likely than non-corporate respondents to recognize leading companies.



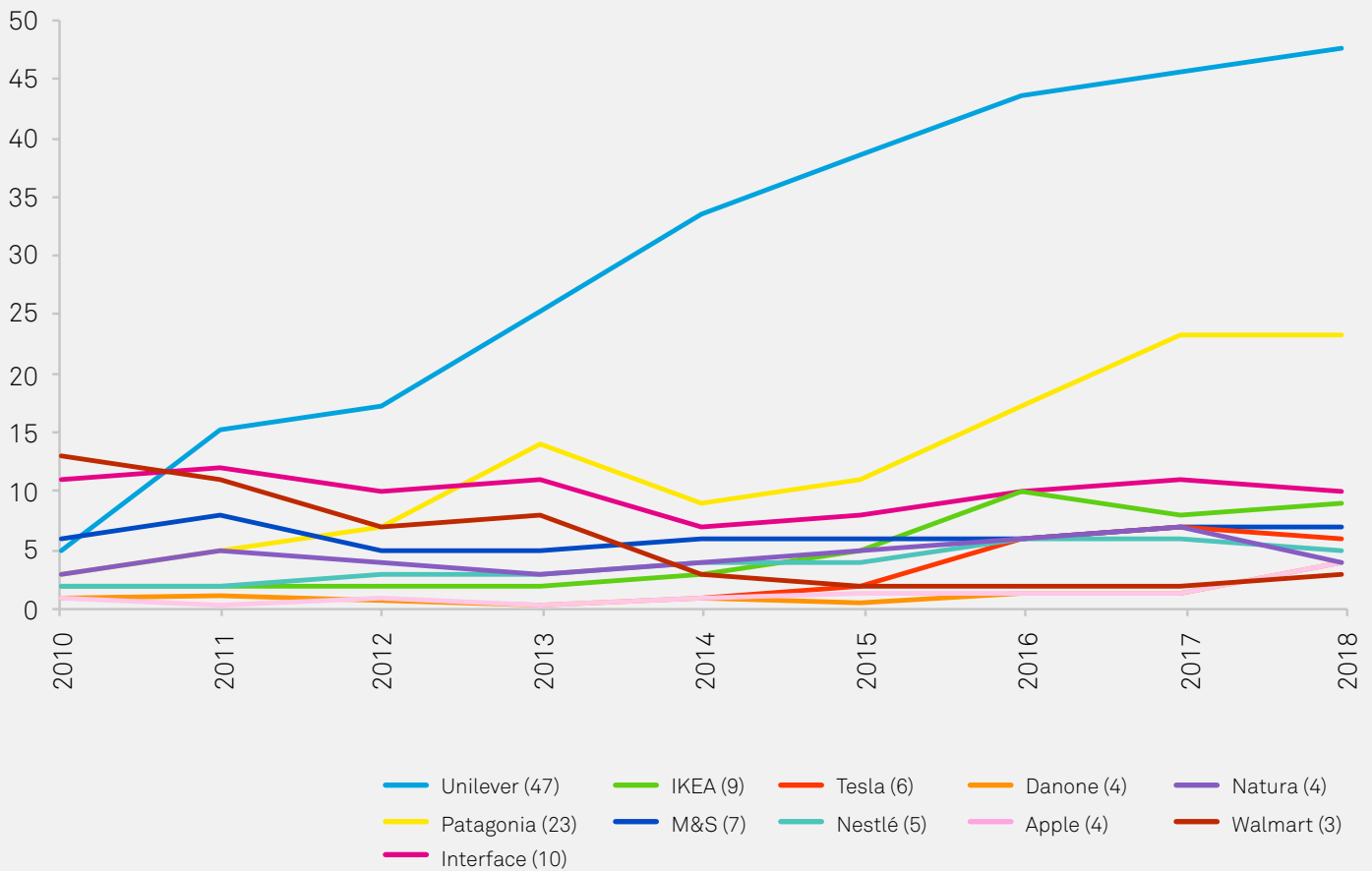
Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Corporate Leaders

Unilever and Patagonia maintain their lead against the majority of other top companies. Walmart rejoins the leadership cohort and Natura's rating declines slightly from 2017.

% of Experts, Total Mentions, Unprompted, 2010–2018



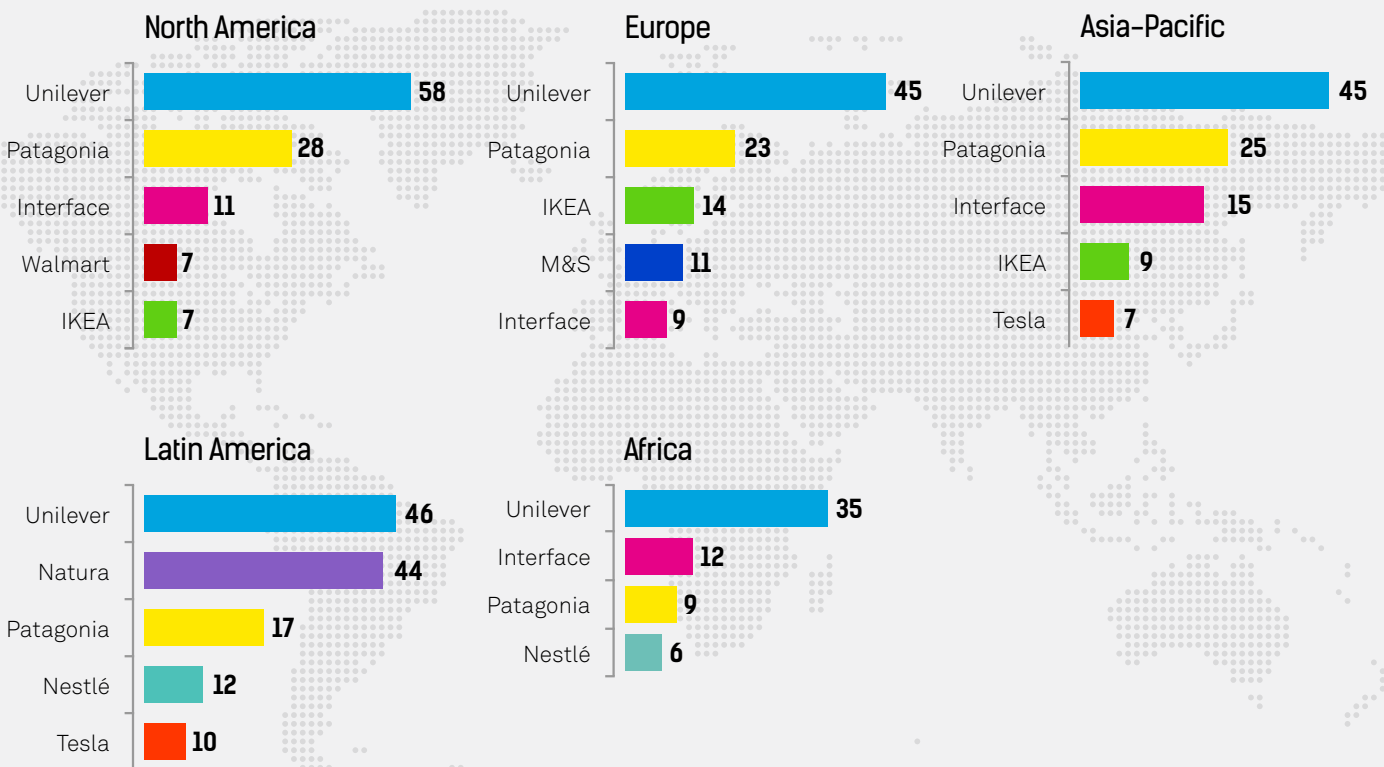
Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Corporate Leaders

For the first time, Unilever holds the number one position in all regions, ousting Natura from first place in Latin America. Patagonia continues to be recognized as a leader in all regions, while Interface features in the top five in all regions except for Latin America. IKEA performs strongly in Europe, Asia-Pacific and North America.

% of Experts, by Region, Unprompted, Total Mentions, 2018

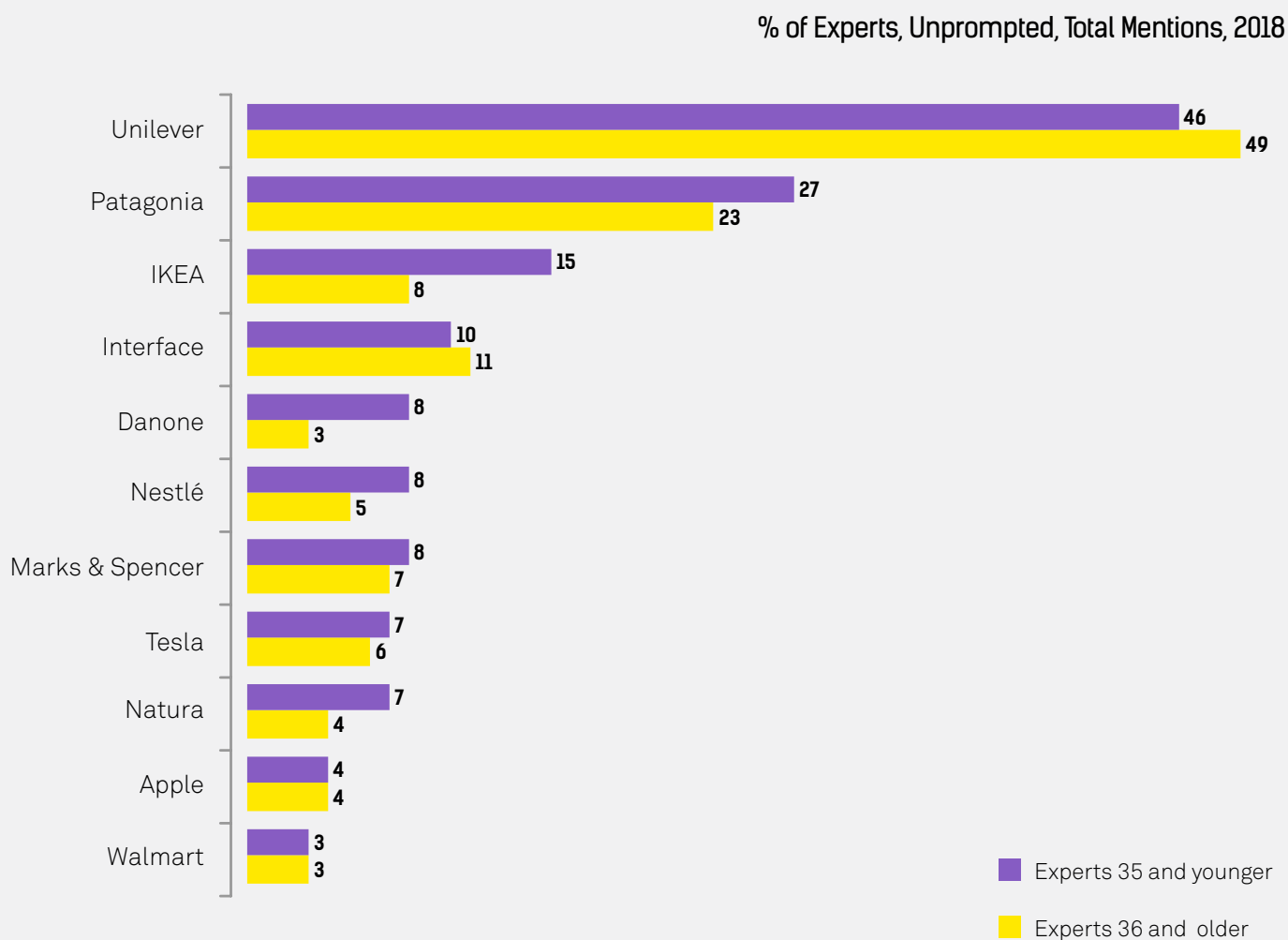


Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

Corporate Leaders: Generational Differences

Younger experts are more likely to recognize IKEA and Danone than are older experts.



Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

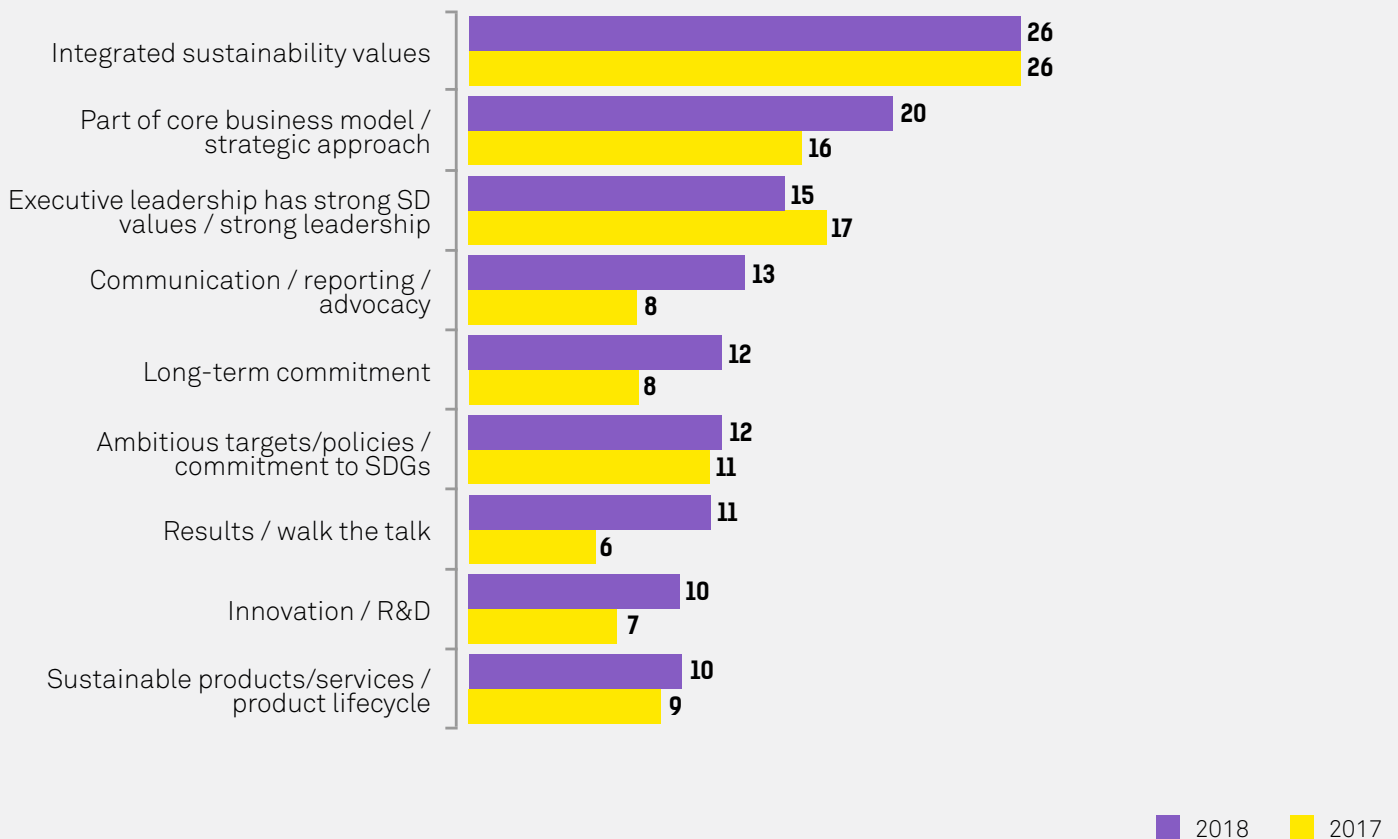
How Experts Define Corporate Leadership



How Experts Define Corporate Leadership

Values and sustainability integration continue to drive leadership. The perceived importance of business model integration, long-term commitments, walking the talk and advocacy have all increased since 2017.

% of Experts, Unprompted, Total Mentions, 2017-2018



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

Why Companies Are Seen as Leaders: Select Quotes

“ Integrated sustainability values

“Incorporating sustainable sourcing and sustainable materials into their business” - *re: Patagonia*

“Integrates sustainability from purpose to product development and all the way to post-consumption” - *re: Natura*

“ Strong leadership

“CEO Paul Polman is a vocal advocate for sustainable development, leading not only Unilever to greater sustainability, but also working to convince and encourage other companies to step up too” - *re: Unilever*

“Taking action instead of just making claims” - *re: Danone*

“ Part of core business model

“It’s part of the fabric of how they do business – it impacts every decision they make” - *re: Interface*

“It is core to their entire business model and how they are differentiating the company and its products” - *re: Unilever*

“ Supply chain management

“They are successfully forcing efficiencies throughout their supply chain” - *re: Walmart*

“Commitment to creating shared value throughout their supply chain” - *re: Nestlé*

“Achieving traceability and transparency while seeking living wages for employees and suppliers through their supply chain work” - *re: Tesla*

Interface®

patagonia®



Walmart*

TESLA

natura



DANONE
ONE PLANET. ONE HEALTH

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.

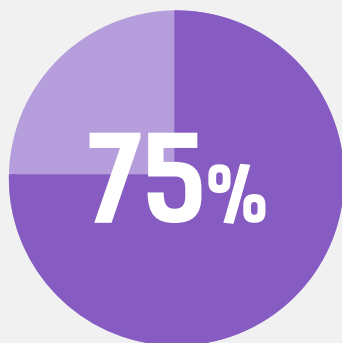


Company Performance on Pre-Defined Leadership Attributes

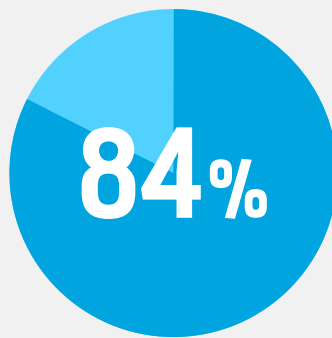
Company Performance on Pre-Defined Leadership Attributes

Performance of all leading companies on five pre-defined leadership attributes.

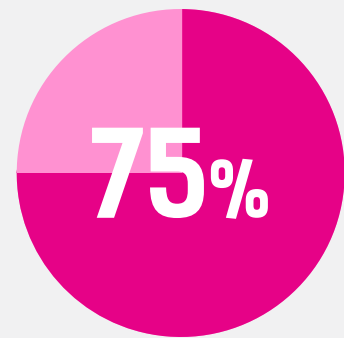
% of Experts, "Excellent" (5) and "Good" (4), 2018



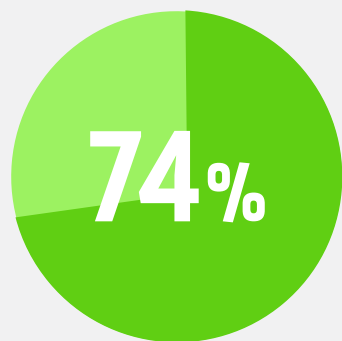
Purpose



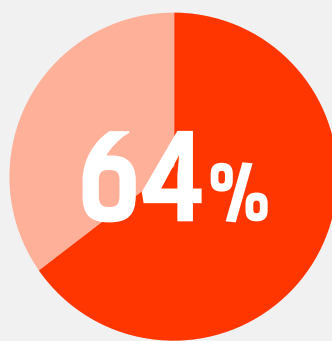
Plan



Culture



Collaboration



Advocacy

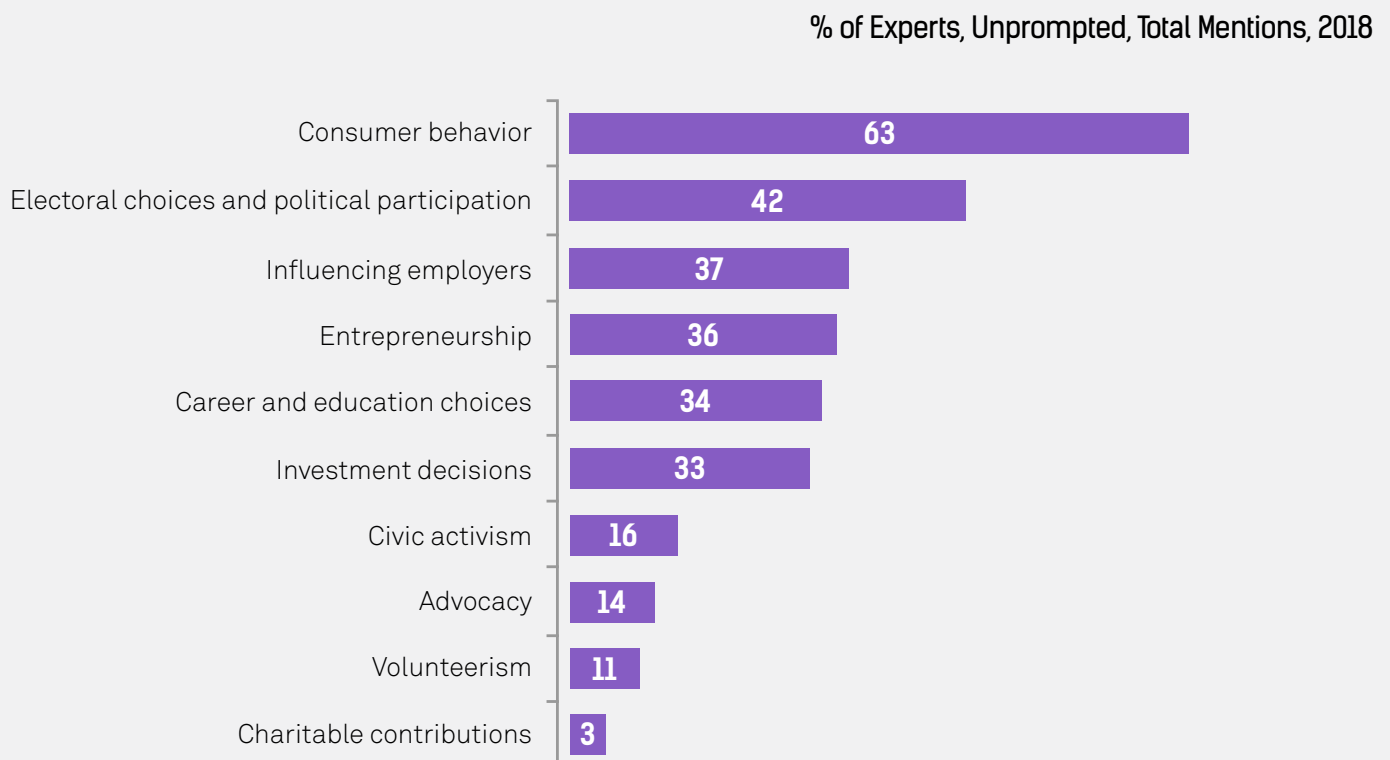
Question

Please rate how well [insert company #1 From Q2] performs in each of the following specific areas. Please use a scale from 1 to 5 where 1 is "poor" and 5 is "excellent." Asked only to those who named at least one company in Q2.

How Young Adults Can Influence the Sustainability Agenda

How Young Adults Can Influence the Sustainability Agenda

Consumer behavior and political participation are seen as the most effective drivers of progress on sustainable development for young adults across all experts, regardless of age groups.



Question

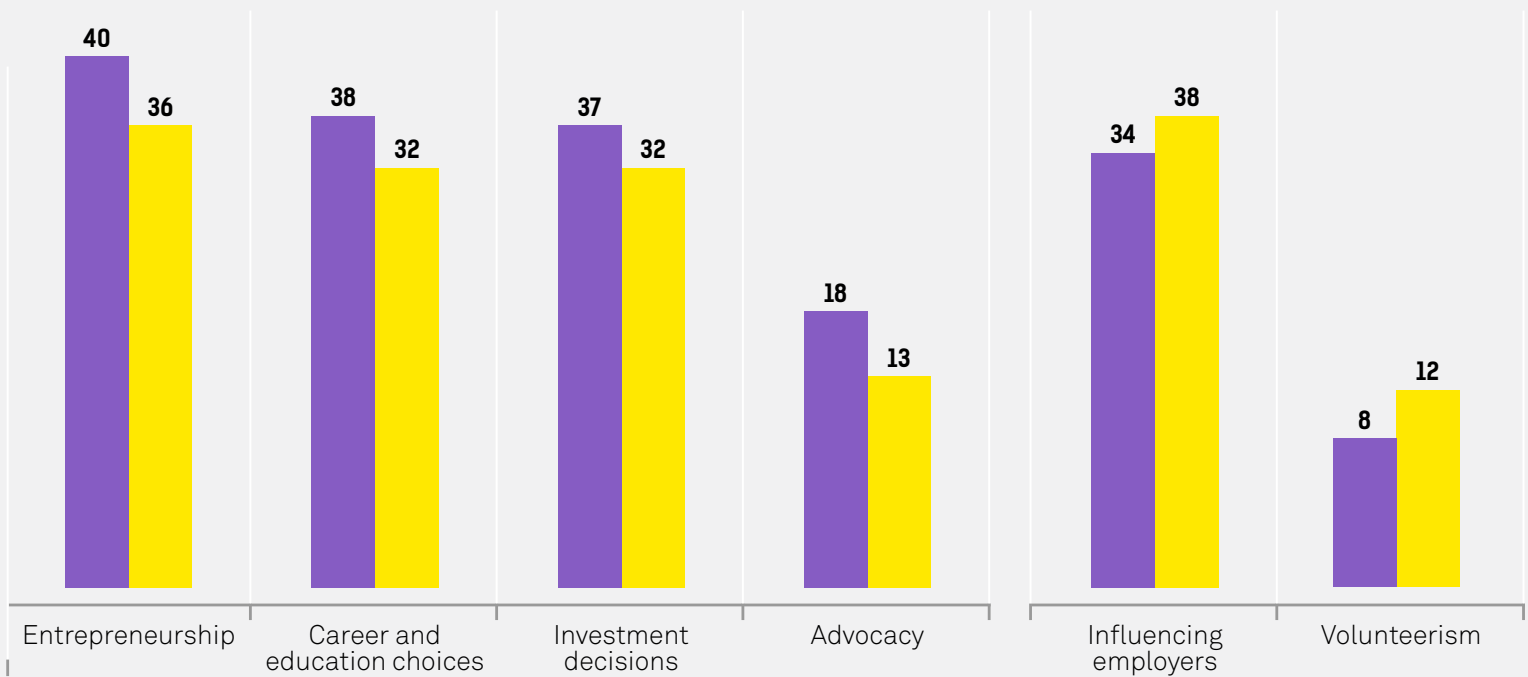
What are the most effective ways for people aged 18 to 35 to help make progress on the sustainable development agenda? *Please select up to three, in order of importance.*

How Young Adults Can Influence the Sustainability Agenda: Generational Differences

Younger experts view entrepreneurship, advocacy, career and investment choices as slightly more important to advancing sustainability than experts 36 and older.

■ Experts 35 and younger
■ Experts 36 and older

% of Experts, Unprompted, Total Mentions



Question

What are the most effective ways for people aged 18 to 35 to help make progress on the sustainable development agenda? Please select up to three, in order of importance.

Conclusion

A handful of companies with clear values and deep sustainability integration have achieved impressive ongoing recognition from experts in recent years. But global sustainability cannot be achieved by a tiny number of leaders, it requires determination and ambition from the thousands of global companies yet to embrace the sustainable development agenda. When this mass of companies engages, transforming their business models to deliver more value to society in addition to shareholders, the balance will tip.

Further Information

For more information please contact...

GlobeScan

Toronto: +1 416 962 0707
San Francisco: +1 415 874 3154
London: +44 20 7253 1450
Cape Town: +27 21 782 5541
Hong Kong: +852 9723 9092

GlobeScan.com



Eric Whan
Director
eric.whan@globescan.com



Tove Malmqvist
Research Manager
tove.malmqvist@globescan.com

SustainAbility

London: +44 20 7269 6900
New York: +1 718 210 3630
San Francisco: +1 510 982 5003

SustainAbility.com



Mark Lee
Executive Director
lee@sustainability.com



Bron York
Analyst
york@sustainability.com