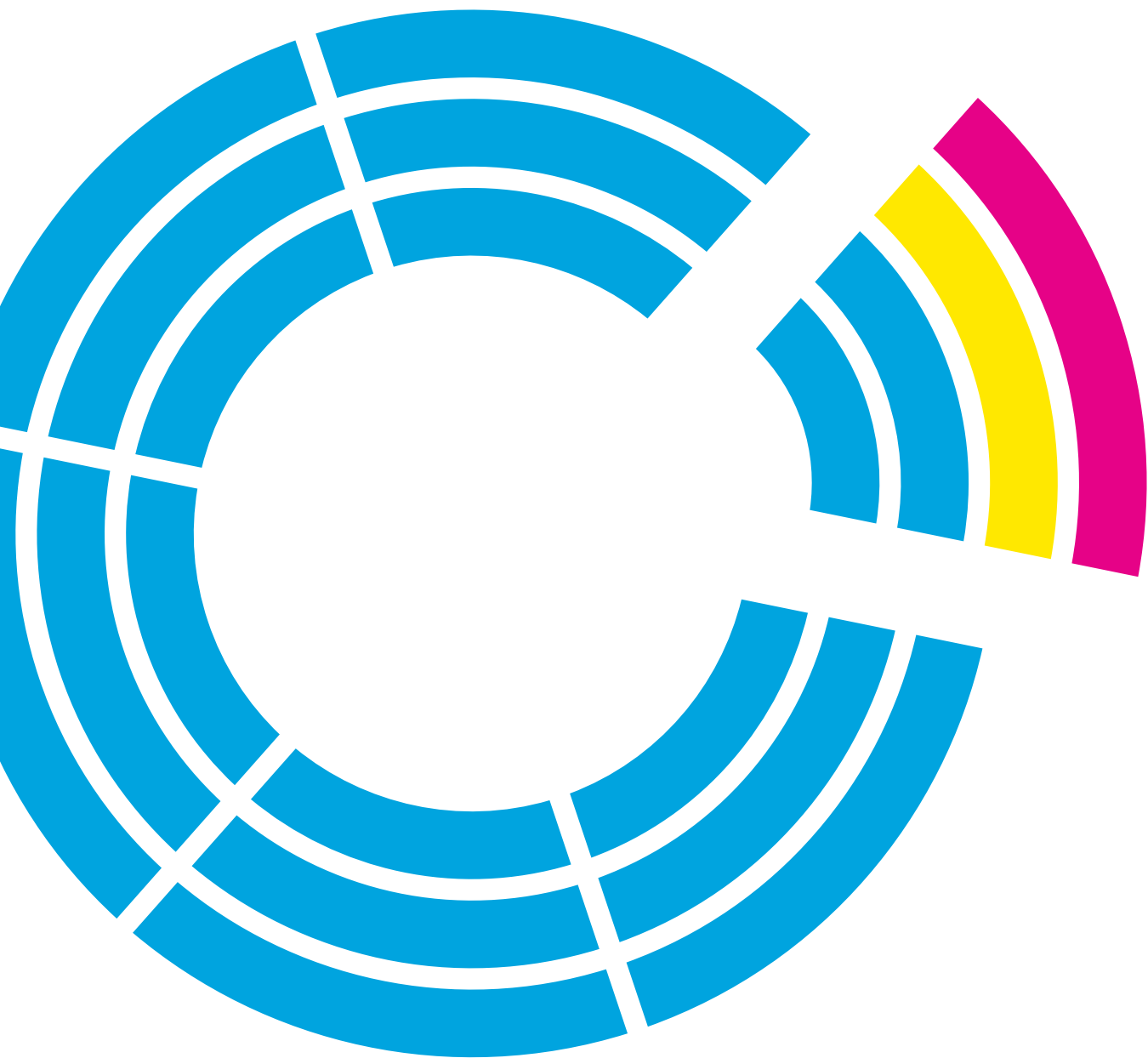




The 2017

# Sustainability Leaders: Celebrating 20 Years of Leadership

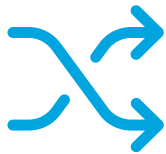


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# About The GlobeScan-SustainAbility Survey

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
- Institutional (e.g., academics)
- Service (e.g., consultants, media)



## Up-to-date



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

Each publication is supported by a global interactive webinar where we invite the foremost thinkers to contribute to our panels.



## Accessible

You can download all the latest surveys from the *GlobeScan* or *SustainAbility* websites.

-  Download from **GlobeScan**
-  Download from **SustainAbility**

# Introduction

Over two decades, we have witnessed an evolution of the terms upon which organizations are recognized for their leadership in sustainability, and expect them to become only more demanding.

This report represents a significant milestone. Sustainability Leaders, the longest-running survey of its kind, marks 20 years of tracking expert opinions on the evolution of the sustainability agenda and perceptions of leading organizations most responsible for driving it forward.

Since the launch of our first Sustainability Leaders report in 1997, we have seen our respondent pool grow to become a truly global cohort representing experienced sustainability experts from all six continents. From a small survey on what at the time was still seen as a niche topic, Sustainability Leaders has become one of the most respected global surveys tracking perceptions of organizational performance and evolution of leadership attributes.

This year, more than 1,000 qualified experts in 79 countries submitted responses to our questions. The results reinforced several distinct trends that we have observed unfolding in recent years.

First, for the seventh year in a row, Unilever is ranked as the premier global sustainability leader, receiving nearly half the total mentions by global experts. Unilever is the most dominant corporate leader in our survey's history, with its margin of leadership expanding each year. Patagonia and Interface occupy the second and third positions, with IKEA, Natura, M&S, Tesla, Nestlé, Nike, GE and BASF also landing on the list of highest-ranked companies.

Second, Interface placed in the top cohort of leadership yet again this year, something it has done every year since the survey's inception. Interface is the only company to have achieved this, which reflects the remarkable dedication, clarity of vision and meaningful action the company has demonstrated in pursuit of a more sustainable business model since the 1990s, and the widespread admiration this has won.

**“For the seventh year in a row, Unilever is ranked as the premier global sustainability leader, receiving nearly half the total mentions by experts.”**

And third, as select few corporate leaders continue to gain share of recognition, the 2017 survey results show that the gap between top leaders and the rest continues to widen. A handful of consumer-facing companies with powerful visions and values continue to win more share of mind among experts and it is becoming harder for others to break through.

Our survey has shown that values, committed executive leadership and making sustainability part of their core operations is what has earned corporate leaders admiration from experts to date. The attributes that experts believe will matter the most over the next decade are integrating sustainability values, demonstrating a clear vision and fostering transparency.

We thank you for being part of this journey and look forward to tracking the evolution of leadership and sustainable development agenda over the next 20 years.

**“A handful of consumer-facing companies with powerful visions and values continue to win more share of mind among experts and it is becoming harder for others to break through.”**

# Survey Methodology

1035 qualified sustainability experts completed the online questionnaire from March 6th to April 26th, 2017.

## Sectors

Respondents were drawn from the following sectors:



**5%**  
Government



**26%**  
Service & Media



**21%**  
Academic & Research



**29%**  
Corporate



**12%**  
NGO



**7%**  
Other

## Geography

Experts surveyed span 79 countries in the following regions:



**28%**  
North America



**40%**  
Europe



**8%**  
Asia



**12%**  
Latin America



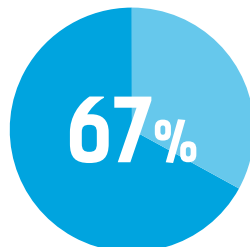
**8%**  
Africa



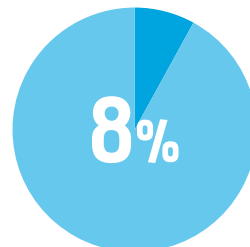
**4%**  
Oceania

## Experience

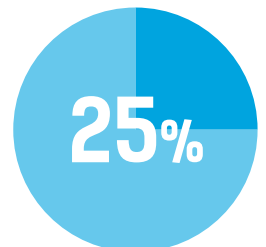
Respondents have the following experience working on sustainability issues:



More Than 10  
Years



5 to 10  
Years



3 to 4  
Years

# Key Findings

- **Consistent with previous years, non-state actors continue to receive the highest scores on sustainability leadership.** The performance of NGOs is rated positively by 59% of respondents, and the performance of social entrepreneurs and academic/research organizations is also seen as good by close to half of experts. Meanwhile, only 9% of experts rate the performance of national governments positively.
- **Asia respondents have the most favorable view of their governments, and Latin America experts the poorest.** Respondents in Germany have the most positive view of their own government's accomplishments.
- **For the seventh year in a row, Unilever is ranked as the top global corporate sustainability leader, mentioned by 45% of experts.** Patagonia and Interface occupy the second and third positions, listed by 23% and 11% of experts respectively. IKEA, Natura, M&S, Tesla, Nestlé, Nike, GE and BASF were also mentioned by at least 3% of experts.
- **Leading companies receive the highest scores on the ability to articulate a vision and define ambitious goals.** Integrated sustainability strategy, vision, innovation and transparency are the qualities that experts believe will define leading organizations a decade from now.
- **When asked about NGO leaders, 28% of polled sustainability experts say that The World Wildlife Fund is the global leader and 18% mention Greenpeace.** Effective stakeholder engagement and collaboration are the key reasons NGOs are recognized as leaders.

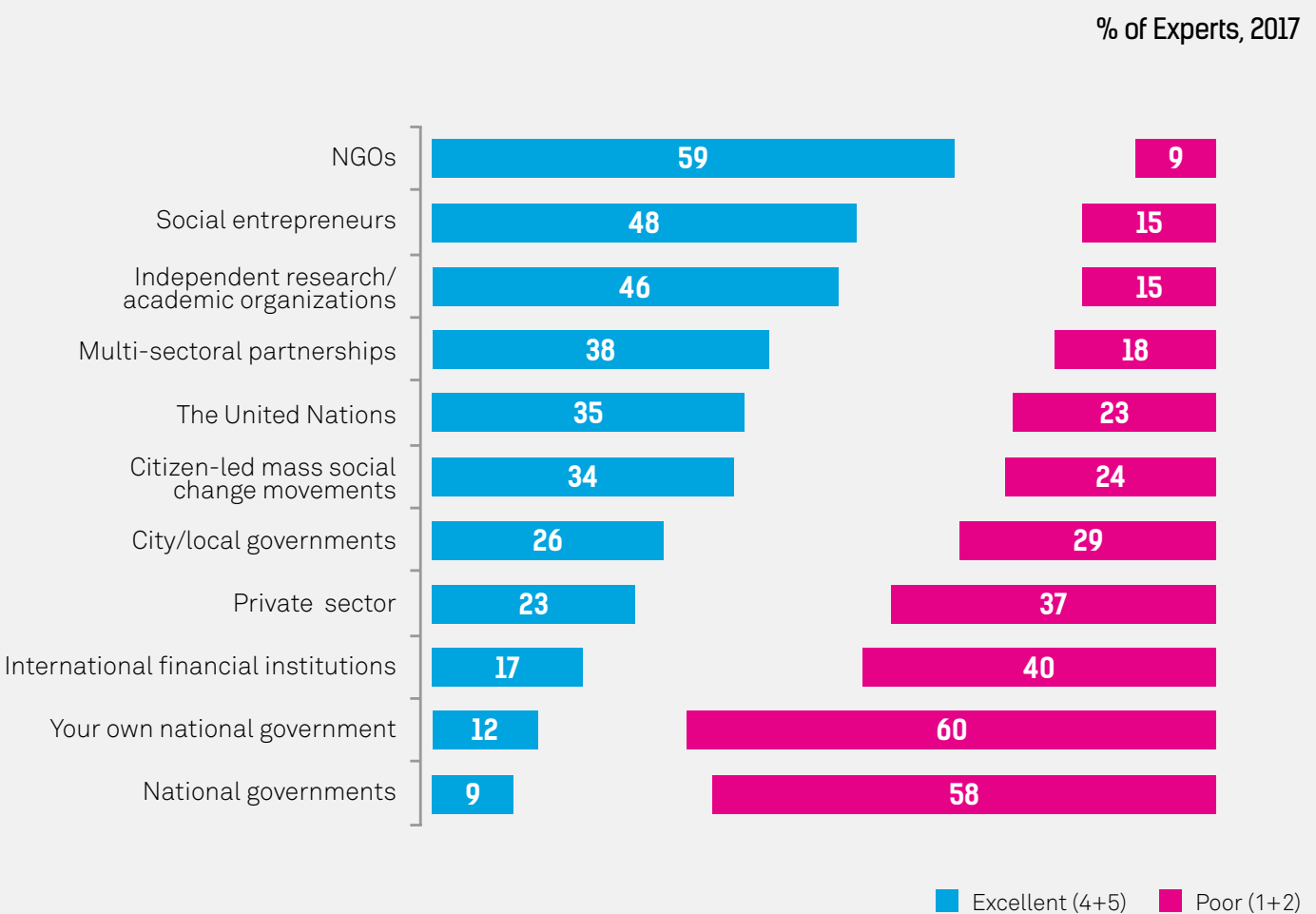
# Institutional Leaders





# Institutional Leaders: Non-State Actors Seen as Strongest Performers

NGOs, social entrepreneurs and academic organizations are seen as having contributed the most to advancing the sustainable development agenda. The performance of governments and the private sector continues to lag and is predominantly perceived to be poor.



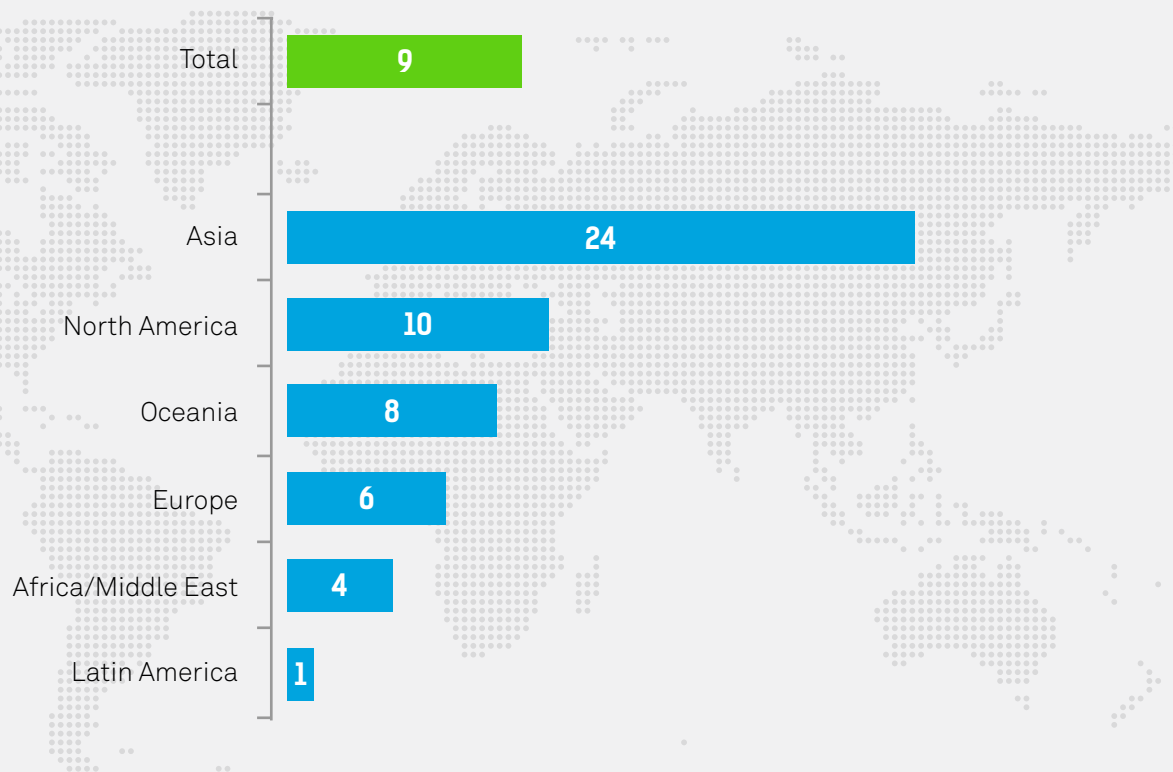
## Question

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: Government Record Viewed Differently Across Regions

While national governments are universally seen as not doing enough, the perception of government differs by region. Respondents in Asia have the most positive view of overall national government performance, and Latin America experts the poorest.

% of Experts, by Region, "Excellent" (4+5), 2017



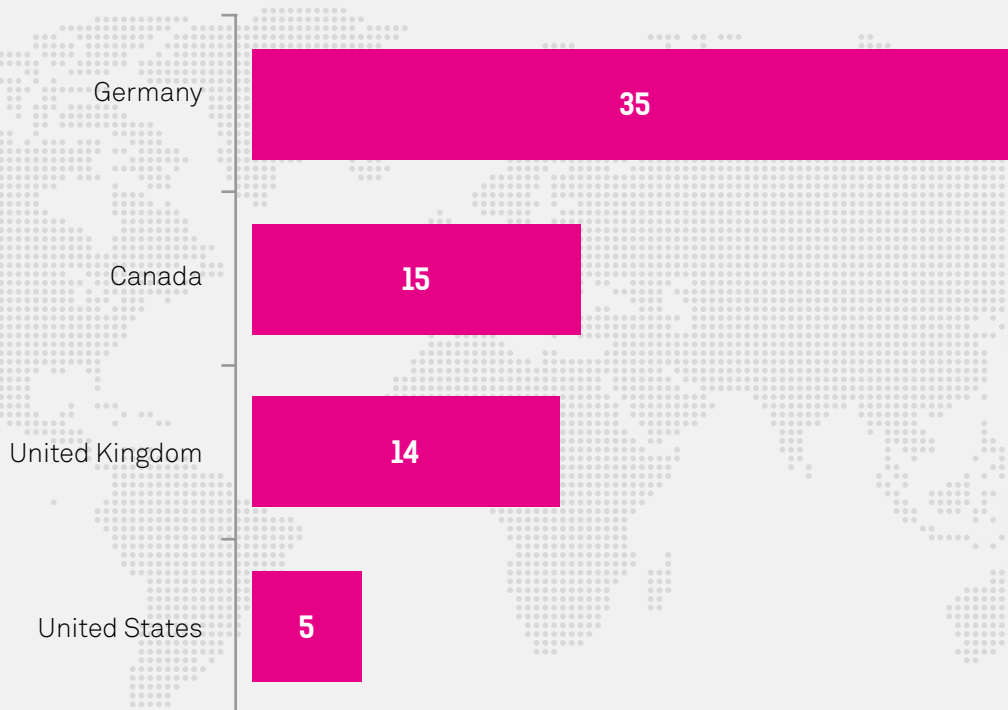
## Question

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: Respondents in Germany Have the Most Favorable View of Their Own Government

When asked to rate the performance of their own national government, respondents in Germany have the most positive view of the country's government. Experts in Canada and the United Kingdom also have a rather favorable opinion about their national government.

% of Experts, "Excellent" (4+5), Selected Countries with n=40 or more, 2017



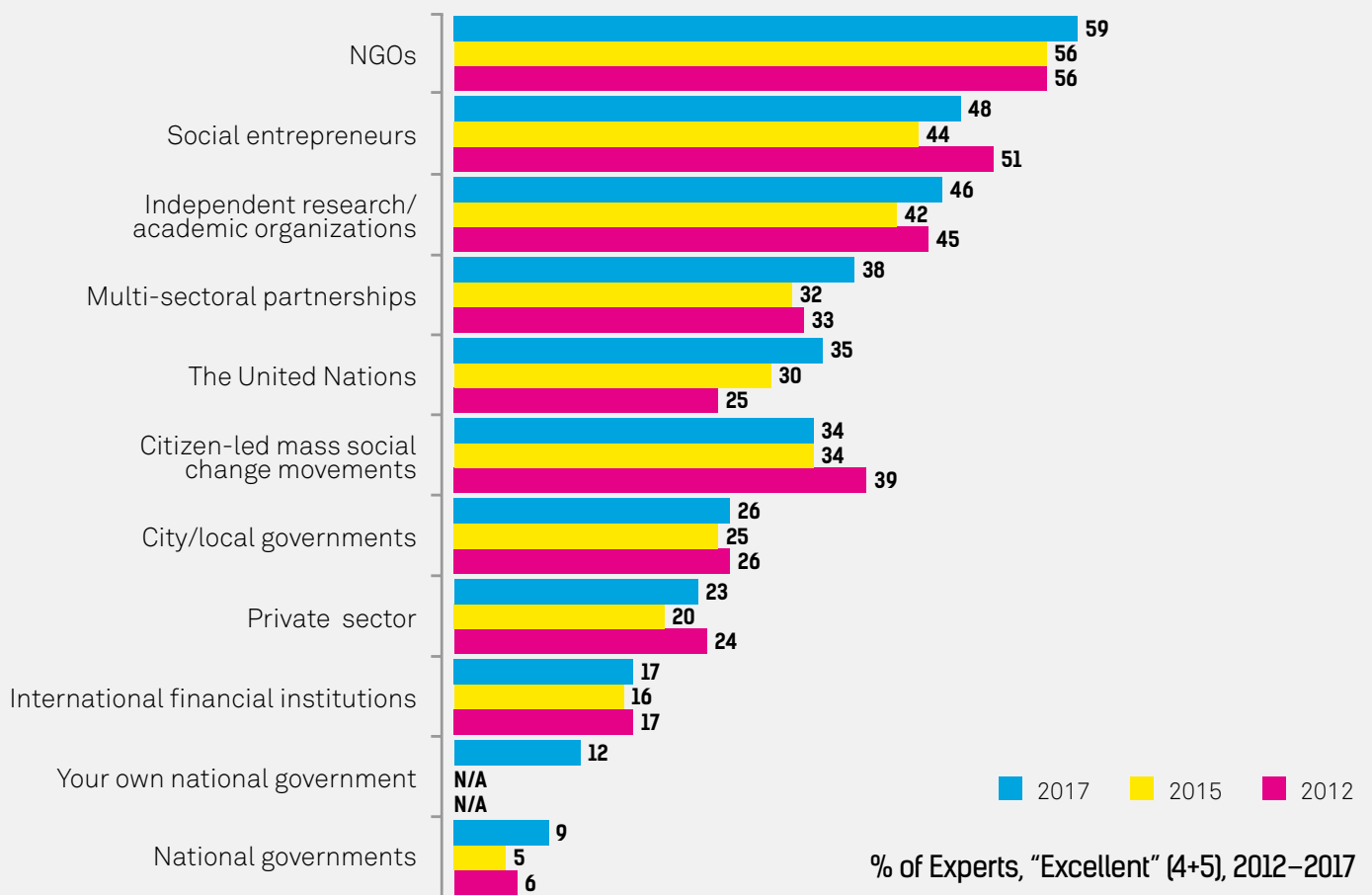
## Question

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:

## Performance of Key Institutions Remains Consistent

There have been no major changes in perceptions of key institutions since 2012. Non-state actors have been consistently seen as leaders by experts, while national governments, international financial institutions and the private sector have been perceived as performing poorly. The only organization to have seen a more noticeable change is the United Nations, whose performance has been improving.



### 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".

# Corporate Leaders



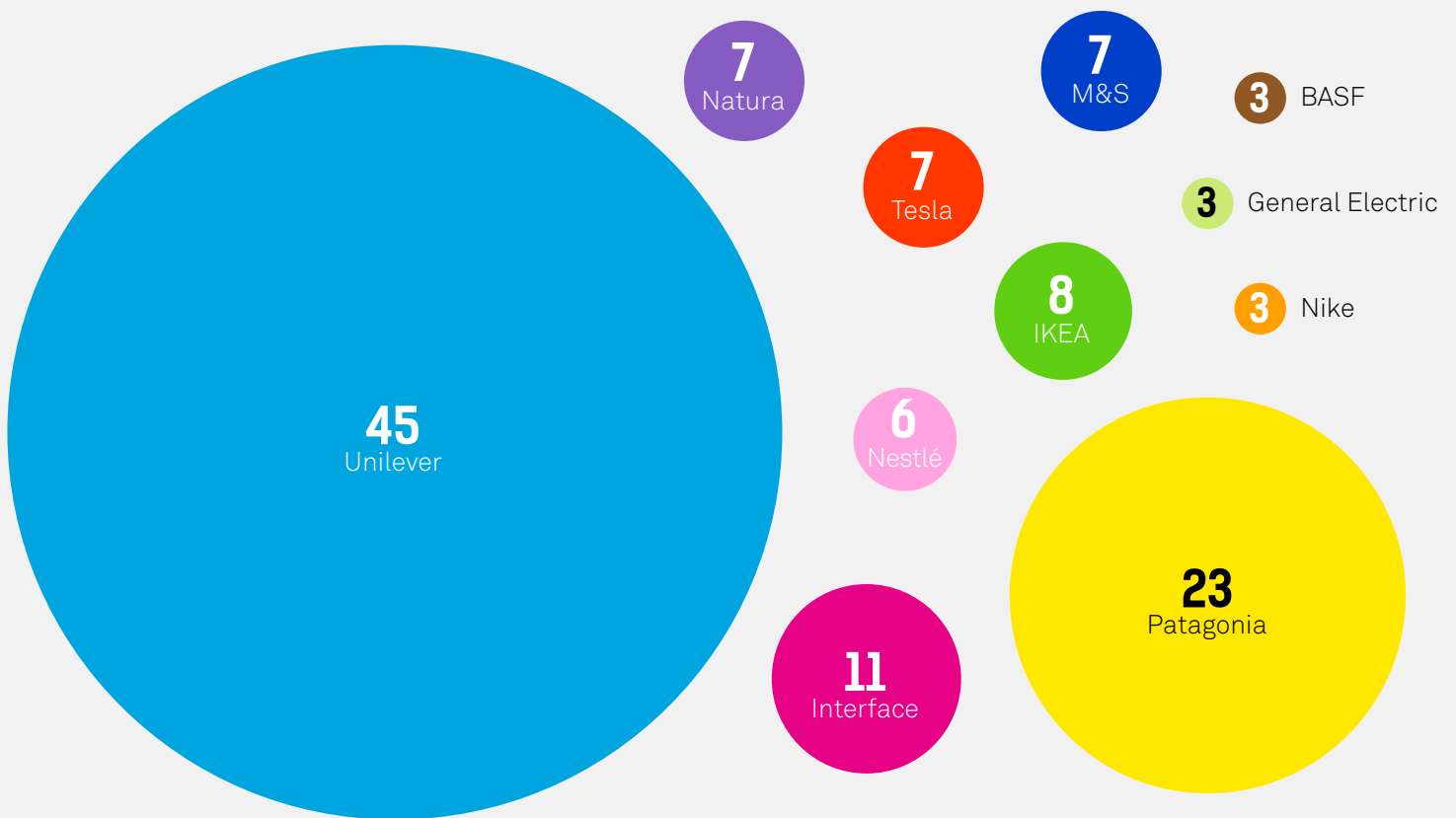
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The 2017 Sustainability Leaders

## Corporate Leaders:

# Unilever, Patagonia and Interface Are Most Recognized Leaders

For the seventh year in a row, Unilever is ranked by experts as the premier global corporate sustainability leader, mentioned by nearly half of polled respondents. Patagonia and Interface occupy the second and third positions.

% of Experts, Total Mentions, Unprompted, 2017



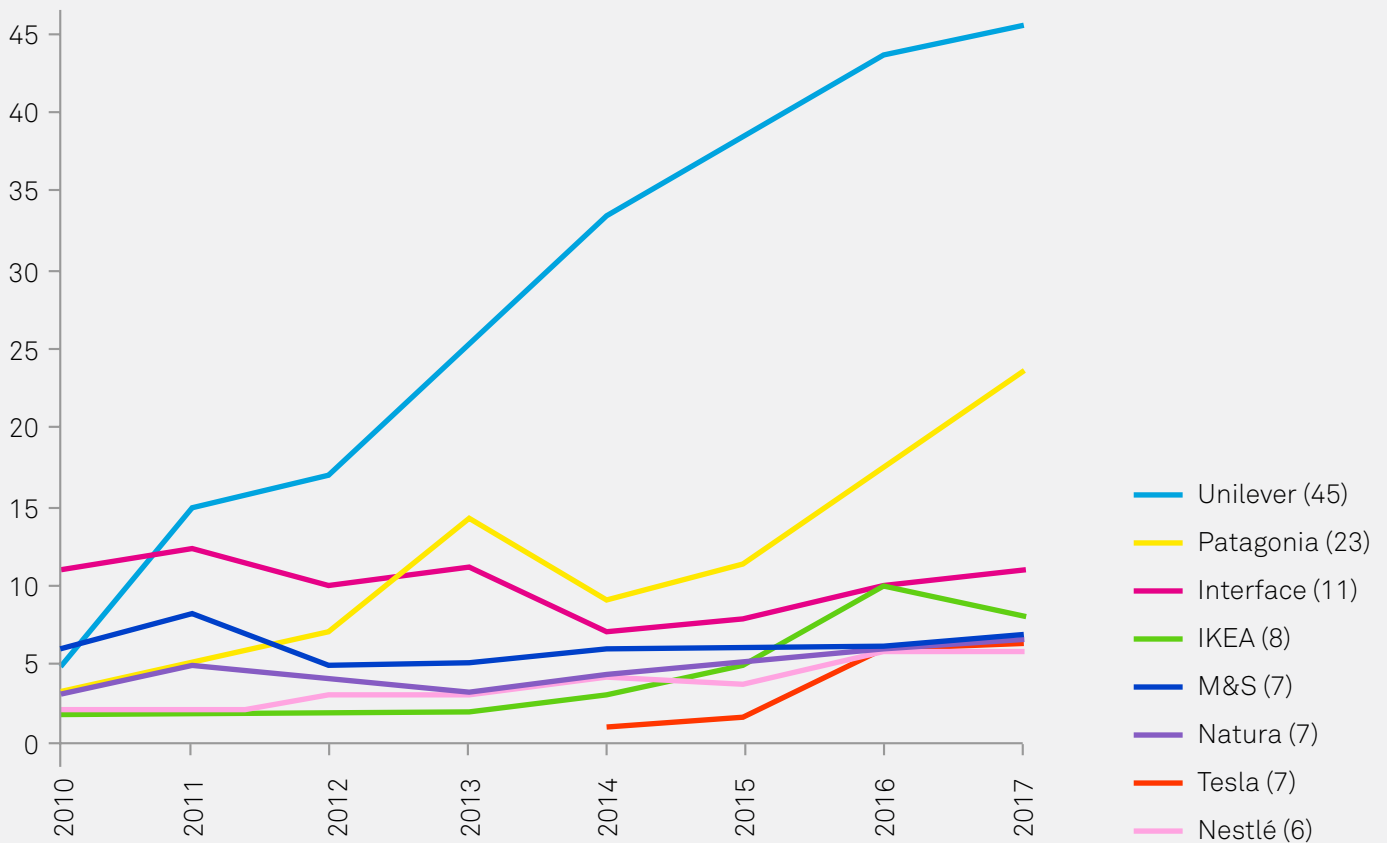
### Question

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

# Corporate Leaders: Unilever Leadership Recognition Is Growing

The degree to which experts perceive Unilever to be the top leader has been growing. Recognition of Patagonia as a leader has also risen since 2015, while the percentage of mentions for most other companies in the top cohort has remained steady.

% of Experts, Total Mentions, Unprompted, 2010–2017



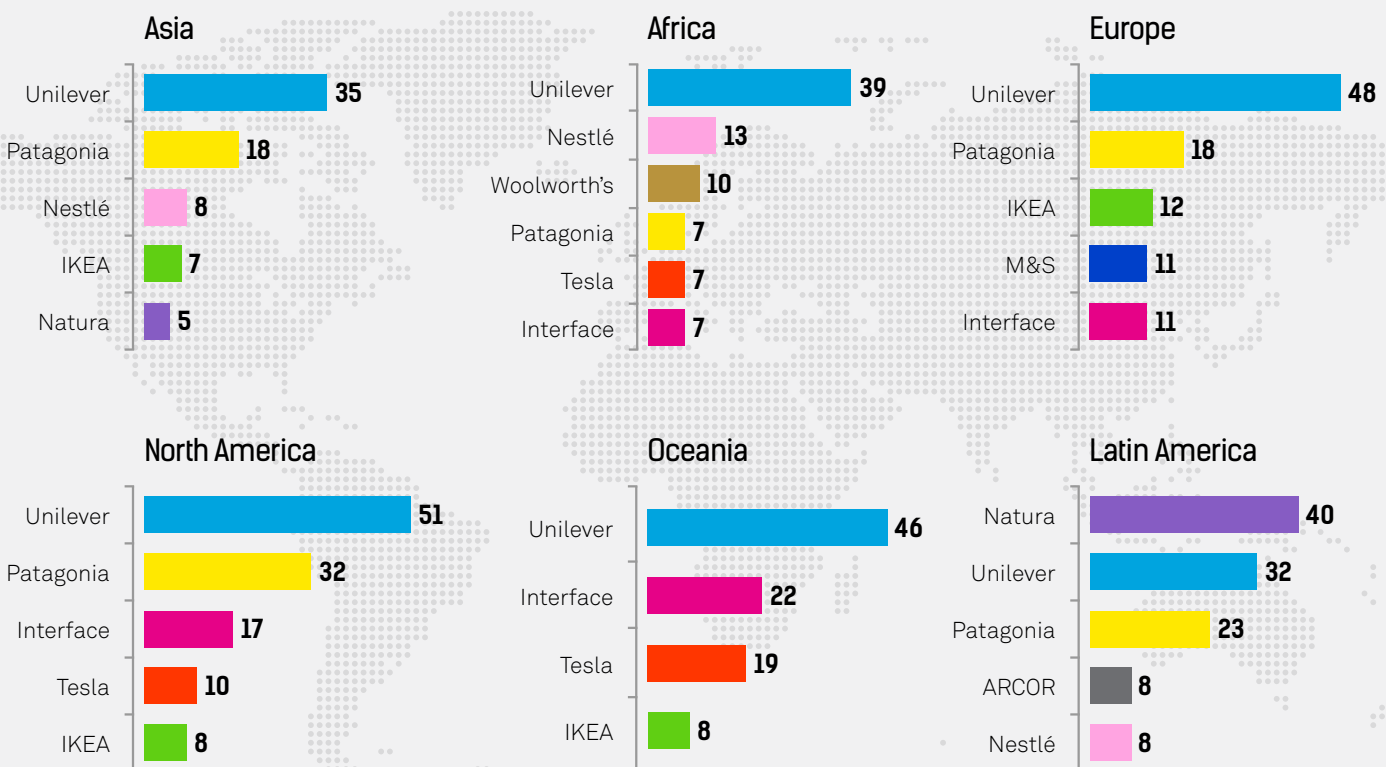
## Question

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

# Corporate Leaders: Unilever, Patagonia Perform Well in All Regions

Unilever and Patagonia are universally seen as leaders by experts around the world. Latin America is the only region to have a home-grown company, Natura, ranked as the top sustainability leader. Unilever leads by the widest margin in Europe.

% of Experts, by Region, Unprompted, Total Mentions, 2017



## Question

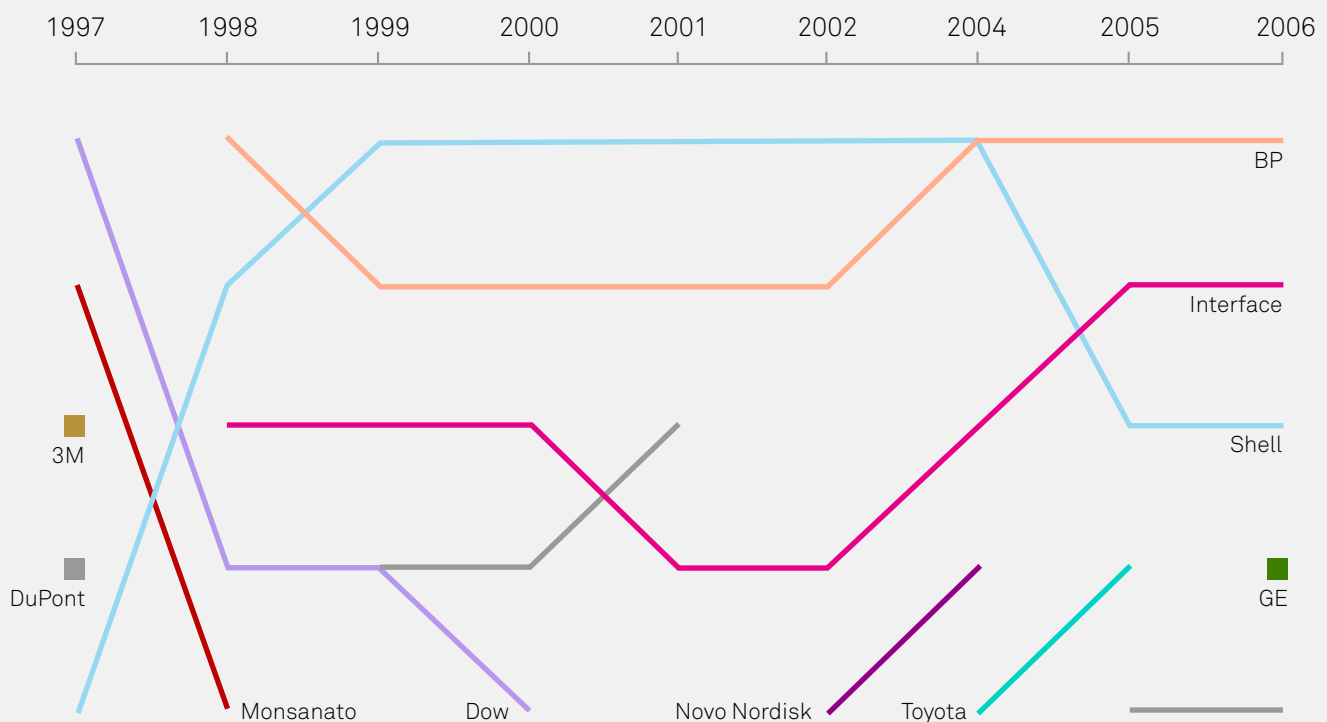
What specific companies do you think are leaders in integrating sustainability into their business strategy? Please enter a maximum of 3 companies.



# Corporate Leaders: 1997–2006: The Do-Less-Harm Era of Leadership

During the first decade of our survey, the list of corporate leaders was dominated by heavy industrial companies, with fossil fuel giants Shell and BP having enjoyed the longest leadership track. GE, ABB, Dow and DuPont also enjoyed positive perception of their leadership during this period.

Top 5 Ranked Companies, 1997–2006



## Question

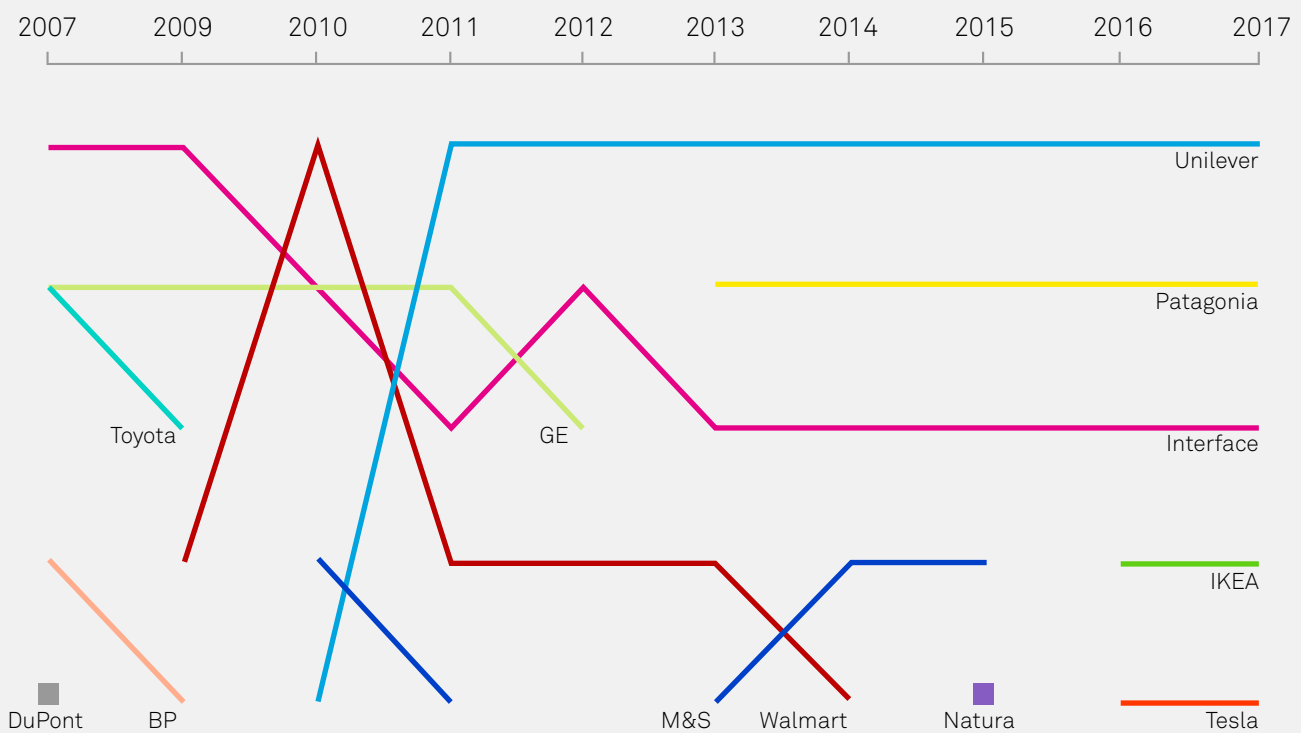
What specific companies do you think are leaders in integrating sustainability into their business strategy? Please enter a maximum of 3 companies.

# Corporate Leaders:

## 2007–2017: The Sustainable Growth Era of Leadership

The second decade of the Sustainability Leaders saw the rapid rise of consumer-facing brands, with Unilever and Patagonia showing the strongest performance. Interface is the only company to be included in the leadership every year since the survey's inception.

Top 5 Ranked Companies, 2007–2017



### Question

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

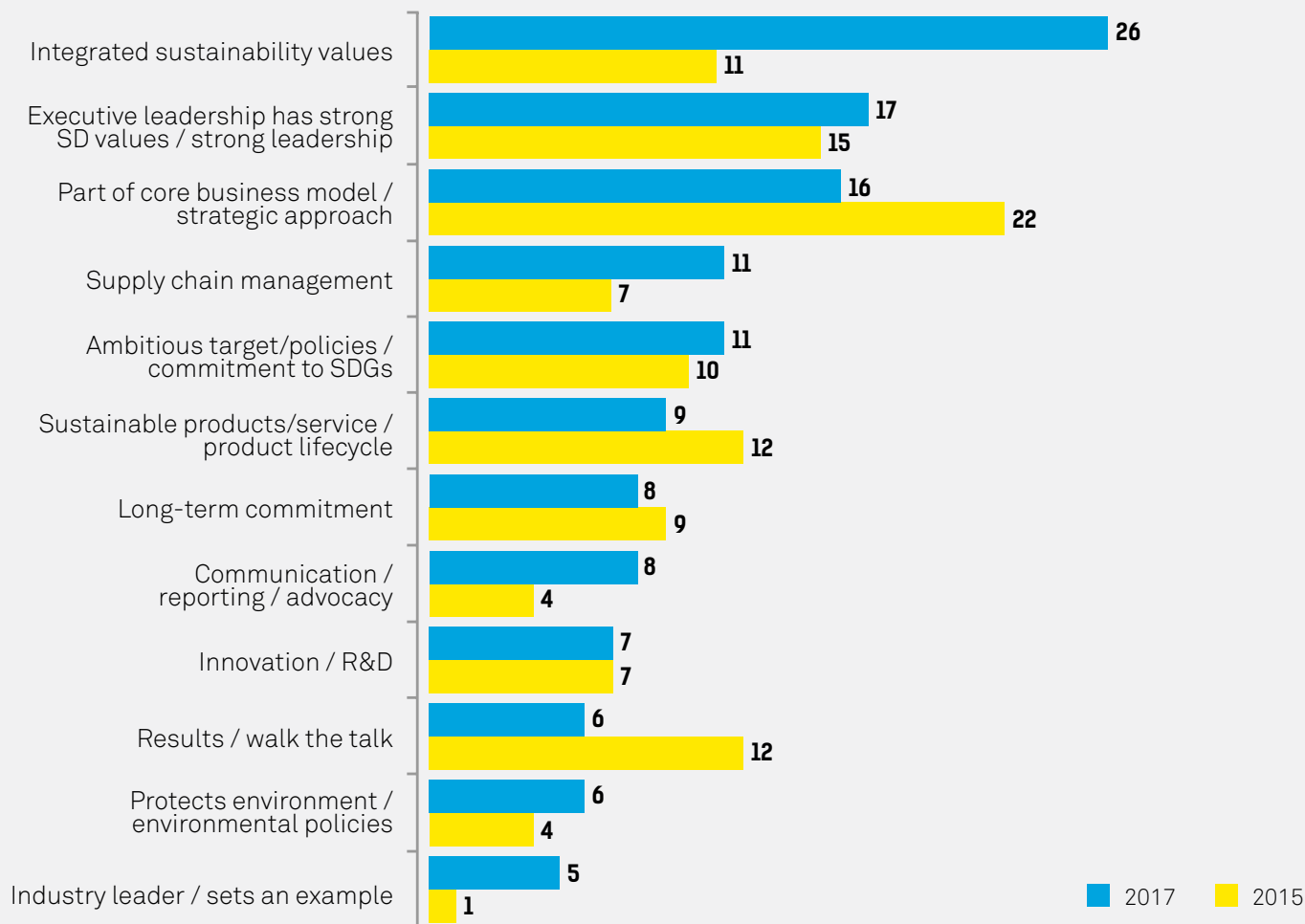
# Company Performance on Leadership Attributes



# Company Performance on Leadership Attributes: Values Drive Company Recognition

When asked to explain why they picked certain companies as leaders, experts mention integrated sustainability values, including those espoused by executive leadership, and making sustainability part of core business operations as the main reasons.

% of Experts, Unprompted, Total Mentions, 2015–2017



## Question

Why do you think [insert specific company] is a leader in sustainable development?  
Please enter up to two responses.

# Company Performance on Leadership Attributes: Why Companies Are Seen as Leaders: Select Quotes

## “ Integrated sustainability values

“Embedded sustainability into ethos and purpose of company – not an ‘add on’” - *re: Interface*

“Even though they sell clothing, they address the fact that consumerism is part of the sustainability problem.” - *re: Patagonia*

## “ Strong leadership

“Visionary leadership that takes a long view. When Paul Polman says he runs the world’s largest NGO, he means it.” - *re: Unilever*

## “ Part of core business model

“They correctly identified nutrition as both a business opportunity and a means of addressing global public health issues and integrated this approach into core business.” - *re: Nestlé*

“The whole business strategy is already sustainable as it offers only electric cars.” - *re: Tesla*

## “ Supply chain management

“Their supply chain engagement and support is a backbone of its sustainable product line.” - *re: Natura*

“Apple has consistently monitored its supply chain for sustainability in product manufacturing and development.” - *re: Apple*

Interface®

patagonia®



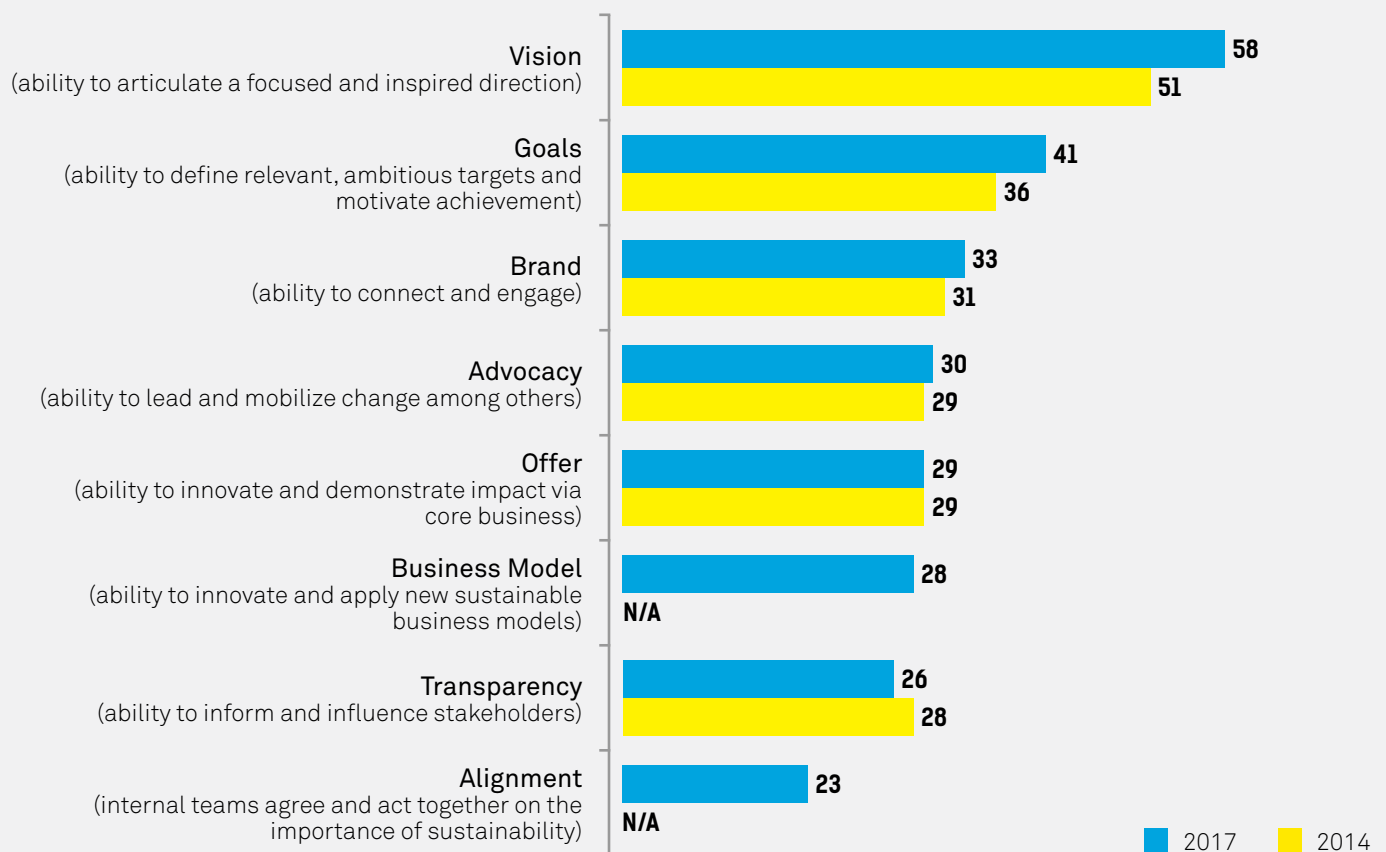
## Question

Why do you think [insert specific company] is a leader in sustainable development?  
Please enter up to two responses.

# Company Performance on Leadership Attributes: Vision and Goals Are Defining Attributes of Corporate Leaders

When asked to score their selected global corporate leader on a list of leadership attributes, experts assign the highest scores for their ability to articulate a focused and inspiring vision and to define relevant and ambitious goals.

% of Experts, "Excellent" (5), 2014–2017



## Question

Please rate the performance of [insert company] on each the following attributes of corporate sustainability leadership. Please use a scale from 1 to 5 where 1 is "poor" and 5 is "excellent."

# NGO Leaders

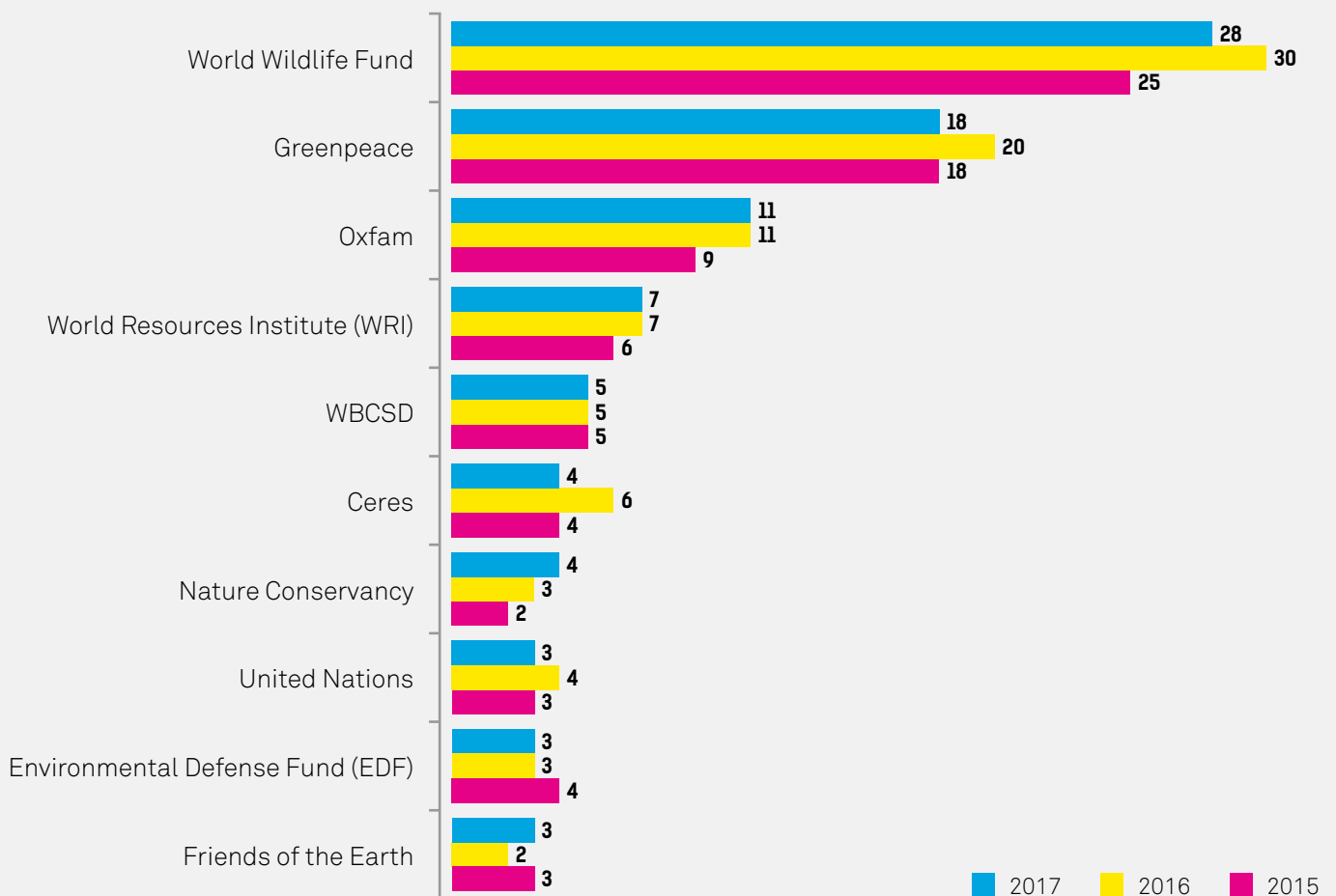


# NGO Leaders:

## WWF Is the Most Widely Recognized NGO

The World Wildlife Fund and Greenpeace are seen as the world’s leading NGOs for advancing the sustainable development agenda. Both organizations have held onto these respective leadership positions since 2015.

% of Experts, Unprompted, Total Mentions, 2015–2017



### Question

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

Please enter up to two responses in the spaces provided.



# NGO Leaders:

## Collaboration is the Key Driver of NGO Reputation

Effective stakeholder engagement and collaboration are the main reasons why certain NGOs are seen as leaders on sustainable development. The ability to innovate and scale initiatives are also important leadership characteristics.

% of Experts, Unprompted, Total Mentions, 2017



### Question

Why do you think [insert NGO] is a leader in sustainable development?

Please enter up to two responses in the spaces provided.

# NGO Leaders:

## Drivers of NGO Leadership: Select Quotes

### “ Stakeholder engagement / education / collaboration

“Connecting investors, environmentalists and business and pushing/driving each to do more and work in harmony.” - *re: Ceres*

“Grassroots engagement, global.” - *re: 350.org*

### “ Innovation / science-based/ knowledge

“Consistent studies directly related to issues which are central to sustainability.” - *re: WWF*

“Knowledge-based advocacy.” - *re: WRI*

### “ Scale / reach of initiatives

“Engagement in large-scale solutions, such as standard and certification systems.” - *re: WWF*

“It is a major charity with a lot of clout which allows it to get its message across.” - *re: Greenpeace*



Ceres

350.org



WWF



WORLD  
RESOURCES  
INSTITUTE

GREENPEACE

## Question

Why do you think [*insert NGO*] is a leader in sustainable development?



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# Defining Future Leadership



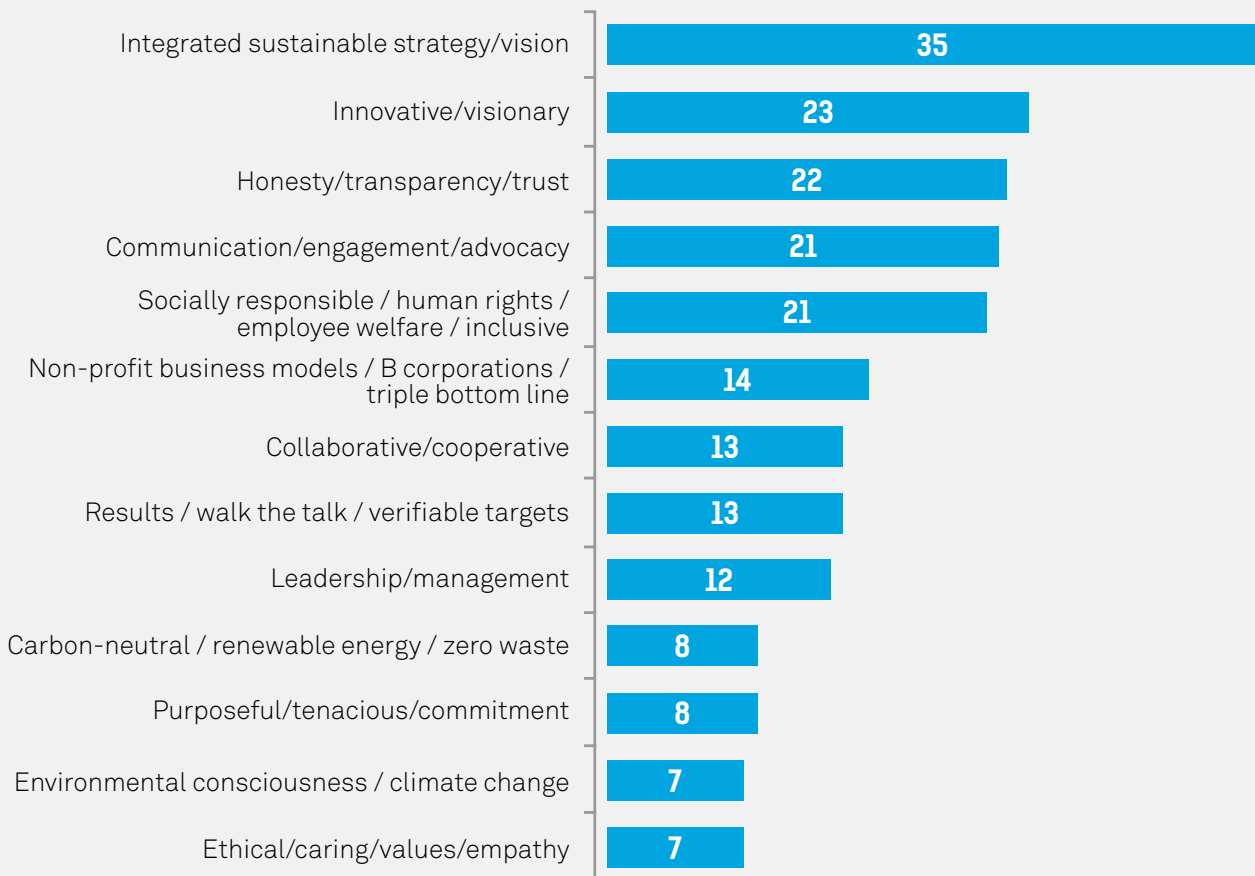
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# Defining Future Leadership:

## Future Leaders Will Excel at Integration and Vision

Making sustainable development core to what they do through integrated sustainability strategy and vision is what will define leading organizations a decade from now. Experts also see innovation, transparency and engagement as key attributes of future leaders.

% of Experts, Unprompted, Total Mentions, 2017



### Question

In thinking about the future of sustainability leadership, please describe the characteristics that you think will most define leading organizations a decade from now.

# Defining Future Leadership:

## Characteristics of Future Leaders: Selected Quotes

### **Integrated sustainable strategy / vision**

“Comprehensive: It is essential that companies address sustainability throughout their business operations and make it core to the way they do business.”

“Sustainability metrics taken with the same level of leadership focus as traditional financial metrics.”

### **Innovative/visionary**

“Looking further ahead – considering 30 years from now in their planning.”

“Long term focus not beholden to short-term shareholders.”

“Disruptive innovation for social good.”

### **Honesty/transparency/trust**

“Transparency and accountability – there must be more than words and good intentions, people need hard evidence and independent evaluations.”

“Honesty and transparency – disclosing positive as well as the negative environmental impacts of their products.”

## Question

In thinking about the future of sustainability leadership, please describe the characteristics that you think will most define leading organizations a decade from now.

# Further Information

For more information please contact...

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