

The 2016 Sustainability Leaders

A GlobeScan | SustainAbility Survey

In partnership with
Sustainable Brands



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About The GlobeScan/ SustainAbility Survey

The 2016 Sustainability Leaders

A GlobeScan | SustainAbility Survey

In partnership with **Sustainable Brands**

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

GlobeScan and SustainAbility have tracked expert opinions on sustainable development leadership for more than 20 years.

Over these two decades, we have seen the sustainability agenda evolve and broaden, watched companies climb to the top of the corporate leadership list and then completely disappear from it, and witnessed many waves of optimism and pessimism as well as shifting expectations.

This edition of the Sustainability Leaders Survey is the first since the adoption of the Paris Agreement. In December 2015, the international community expressed unanimous commitment to tackling climate change and limiting global warming to below 2C. Governments, companies and other stakeholders polled for this year's survey now operate in an environment profoundly different from previous years in terms of ambition, urgency and consensus about the direction of sustainable development agenda.

Also new in 2016, GlobeScan and SustainAbility have joined forces with Sustainable Brands to conduct and publish the survey. This partnership has enabled us to expand the pool of surveyed experts, especially in Asia and Latin America.

For this survey, we asked 907 stakeholders in business, government, NGOs and academia across 84 countries to evaluate the progress that various institutions have made since 1992 and reflect on their expectations for the next 20 years. We also wanted to know who the experts consider to be sustainability leaders among corporations, NGOs and national governments.

We found out that non-state actors continue to outperform all other institutions on sustainable development – especially national governments, which remain at the bottom of the list for their achievements.

Meanwhile, the landscape of expectations for future leadership has been shifting. The private sector has been facing growing expectations to play a larger role, while the perceived role of governments in advancing the sustainable development agenda has been diminishing. This year leadership expectations for the two institutions have leveled out, sending a powerful message to business about its perceived role in the post-COP21 world.

For the sixth year in a row, Unilever remains the most recognized sustainability leader. To obtain a more nuanced picture of corporate leadership globally, this year we also asked experts to name companies that they believe are top performers within their home regions. We also continue to track expert opinions on leading NGOs and national governments.

Despite mounting expectations for the private sector, experts remain critical of its performance to date. The efforts of all industry sectors, even the ones seen as most progressive, are viewed mostly negatively. We believe the adoption of Sustainable Development Goals and the Paris Agreement will provide much-needed impetus and instruments for all institutions to take their performance to the next level. We hope that in addition to growing expectations for the private sector, next year's survey will mark the beginning of another trend – one of greater impact and collaboration.

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Survey Methodology

907 qualified sustainability experts completed the online questionnaire from March 23rd to April 21st, 2016.

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Experience

Respondents have the following experience working on sustainability issues:



More Than
10 Years



5 to 10
Years



3* to 4
Years

** Respondents with fewer than three years experience have been excluded from the results*

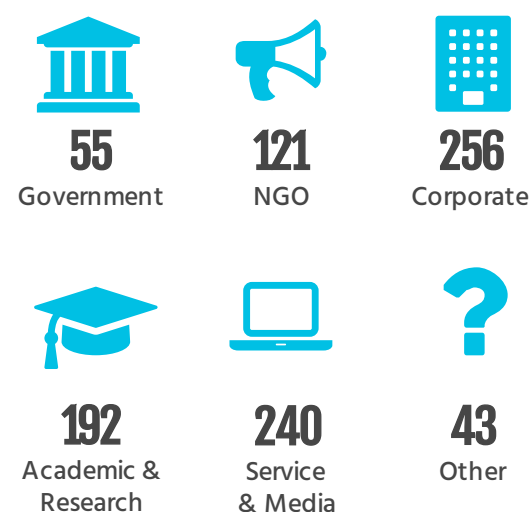
Geography

Experts surveyed span 84 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Key Findings

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- 1** **Non-state actors continue the trend of significantly outperforming all other organizations** on their sustainable development (SD) leadership record. The contribution of NGOs since the 1992 Earth Summit in Rio is viewed positively by 57% of polled experts. Social entrepreneurs, academic institutions and citizen-led mass social change movements are also evaluated positively by respondents. Meanwhile, national governments rank at the bottom of the list, rated positively by only 6% of respondents.
- 2** **Sustainability experts believe that national governments and the private sector equally share the responsibility for advancing SD** over the next two decades, with 34% of experts rating each as vital to progress. Multi-sectoral partnerships are also seen as playing a critical role. Expectations for governments to lead have gradually decreased in recent years, while those for the private sector have been rising.
- 3** **Unilever continues to be regarded as the global corporate leader on sustainability.** It has further increased its leadership margin and was named as a leader by 43% of polled experts. Patagonia, Interface, IKEA and Tesla are also among the top-rated leaders.
- 4** **Regional leadership ratings are dominated by consumer-facing companies,** with Unilever leading in Europe, Patagonia in North America, Woolworths in Africa and Natura in Latin America. In Asia, the Tata group of companies occupies the top position on the list.
- 5** **Aligning sustainability strategy with internal culture and values and integrating purpose via a common brand promise are perceived as two key drivers of corporate leadership.** In the case of Unilever, vocal support of sustainability by senior leadership is the single most important factor accounting for its outsized reputation.
- 6** **44% of respondents suggest that the most effective way for companies to make a positive contribution towards the Sustainable Development Goals (SDGs) is through pursuing partnerships and developing products and services.** Experts also recommend that the private sector should apply the SDGs as a lens in goal-setting and risk analysis processes.
- 7** **WWF and Greenpeace continue to be seen as NGO leaders on sustainable development,** with 30% and 20% of expert votes respectively. Meanwhile, Sweden (27%) and Germany (25%) are most frequently named as government leaders.
- 8** **Experts are critical of industry efforts to transition to sustainable development, with the record of all sectors viewed primarily negatively.** The forest products sector, biotechnology and ICT companies are considered to be managing the transition the best, while the oil & gas and mining industries are viewed negatively by more than 75% of experts.

Institutional Leaders & Progress Over Two Decades

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NGOs Viewed as Biggest Contributors to Progress Since 1992

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Non-profit organizations are seen as having made the largest contribution to sustainable development since the 1992 Earth Summit in Rio, followed by social entrepreneurs, academic organizations and citizen-led social change movements.

National governments are perceived negatively by a majority of respondents, while multilateral organizations and the private sector are also falling behind expectations.

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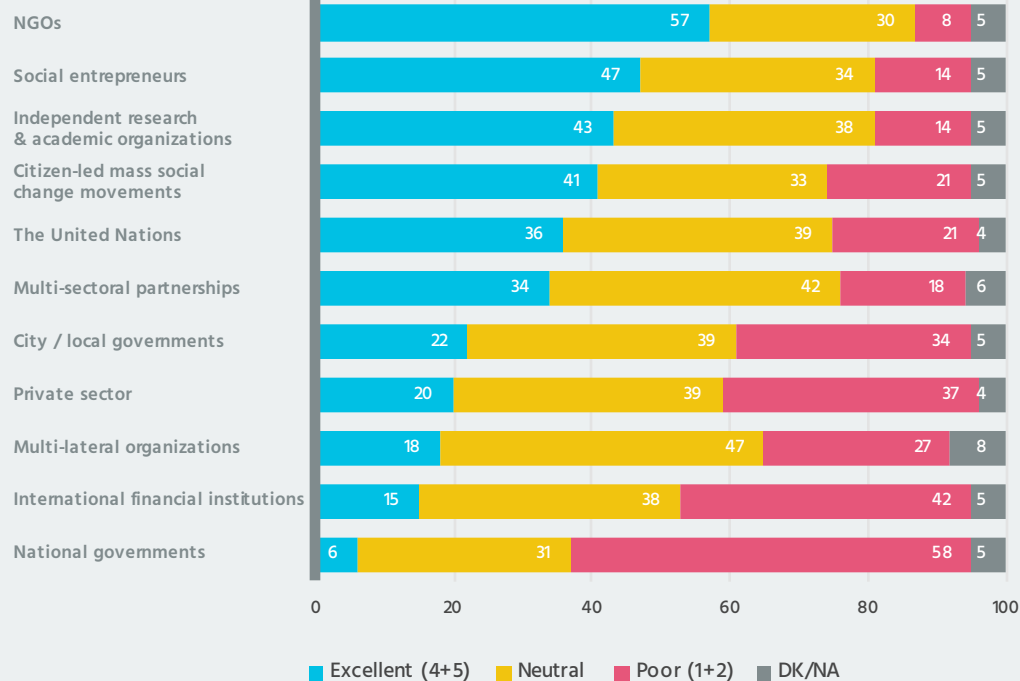
Question

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 the 5-point scale provided, where 1 is "poor" and 5 is "excellent".



All Respondents



Progress Since 2012: Leadership Record Remains Consistent

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Perceptions of institutional leaders have remained consistent over the past four years, with NGOs, social entrepreneurs and academic organizations continuing to hold top positions.

Consistent with previous years, national governments are viewed extremely negatively.

The United Nations is the only institution that has seen its reputation continuously improve since 2012, while the perceived performance of local governments has declined.

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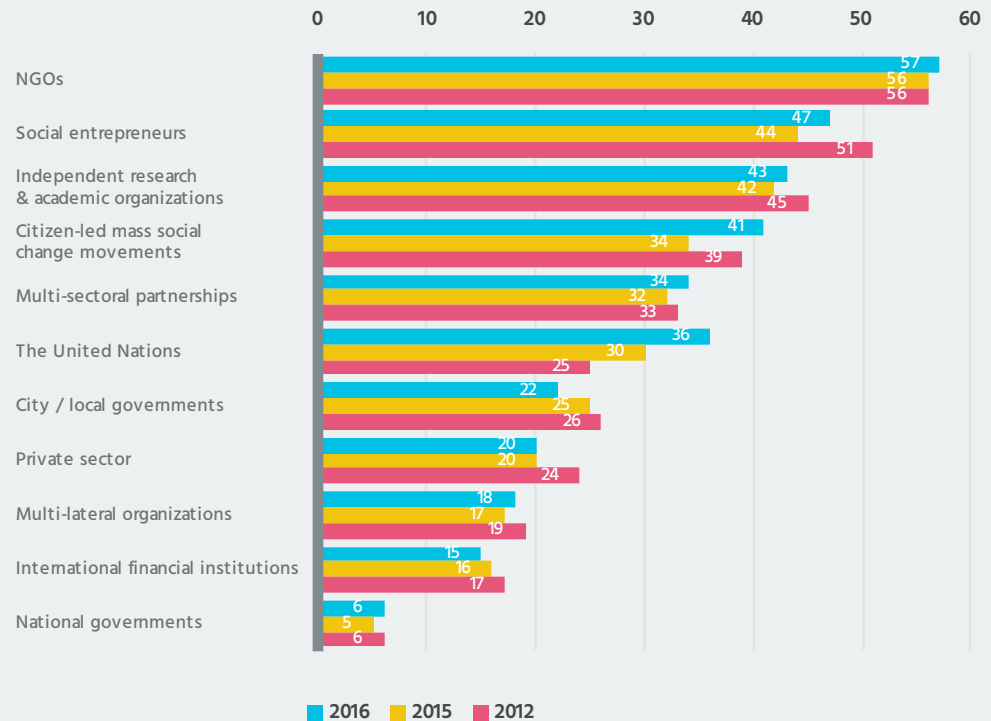
Question

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 the 5-point scale provided, where 1 is "poor" and 5 is "excellent".



"Good performance" (4+5)



Business & Governments Share Equal Responsibility for Future Progress

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Sustainability experts believe that national governments and the private sector equally share the responsibility for advancing sustainable development over the next two decades, an important call to action for global business leaders.

Respondents also believe that multi-sectoral partnerships have a very important role to play. Non-state actors including NGOs, social entrepreneurs and academic institutions face significantly lower expectations for spearheading the agenda.

“

Question

In your opinion, who should lead the sustainable development agenda over the next twenty years?

Please select the two most suited from the following list.



% of Experts, First Choice + Second Choice

National governments

34

Private sector

34

Multi-sectoral partnerships & collaborations

31

The United Nations

21

City / local governments

16

Citizen-led mass social change movements

14

NGOs

12

Social entrepreneurs

9

Multi-lateral organizations

8

International financial institutions

7

Independent research & academic organizations

7

Business now faces the same level of expectations to lead the sustainable development agenda as national governments.

Progress Since 2012: Expectations for Business & Governments Shifting

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Business has seen a steady rise in expectations for leadership in the last four years, while the level of responsibility placed on national governments has been declining.

Leadership expectations this year for the two sectors have evened out, marking a significant milestone. The importance of collaborations for sustainable development progress is also seen as growing.

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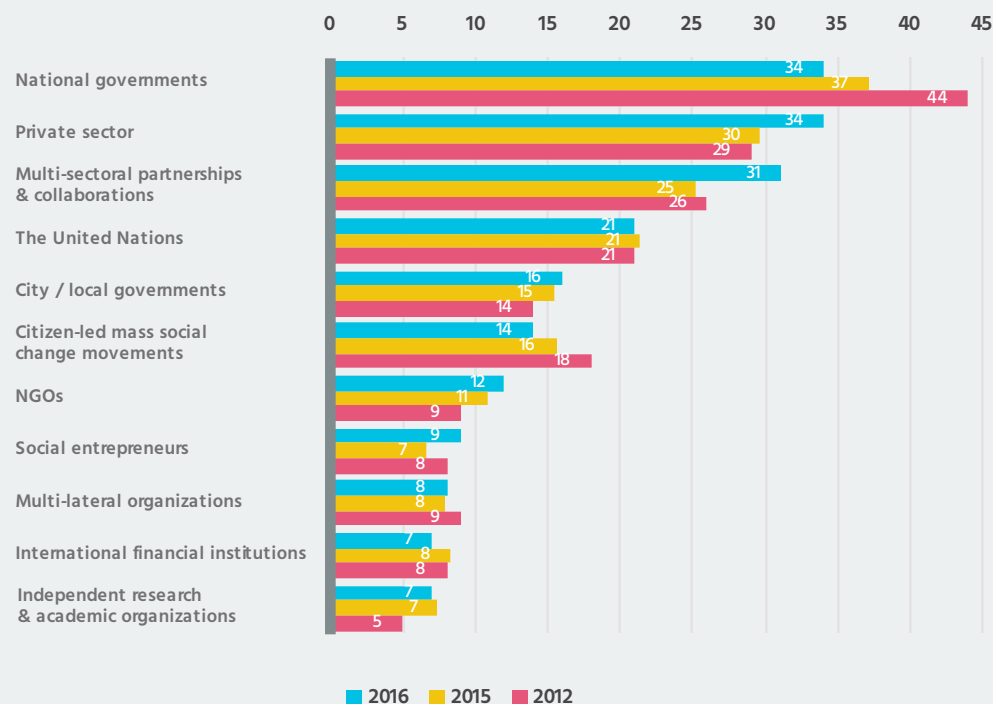
Question

In your opinion, who should lead the sustainable development agenda over the next twenty years?

Please select the two most suited from the following list.



% of Total Mentions, Prompted



Perceived Performance & Future Expectations Remain Misaligned

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The past performance record and expectations for future leadership remain at odds for key institutions. National governments and business are seen as having very poor track records but at the same time are expected to play key roles leading the sustainable development agenda in the next 20 years.

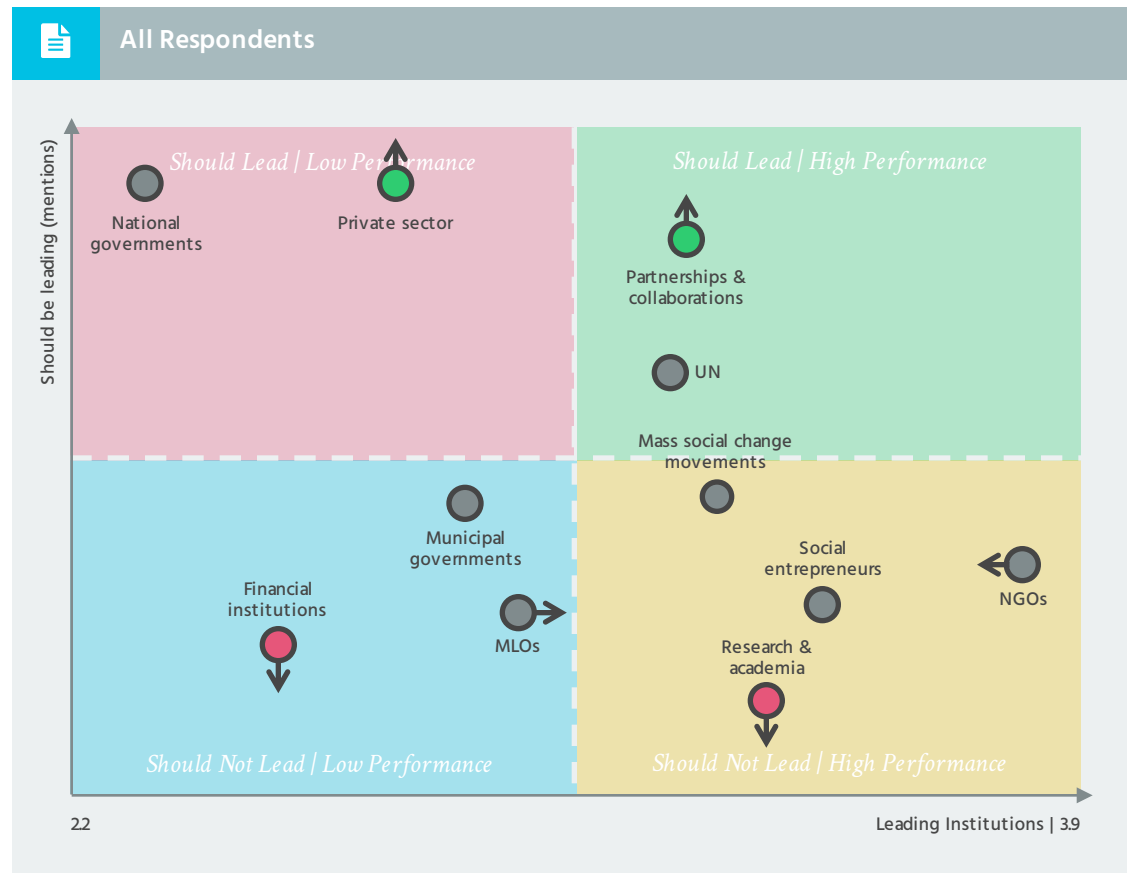
“

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?

Question

Question: In your opinion, who should lead the sustainable development agenda over the next 20 years?



Role of Government & Business Seen Differently Across Regions

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In most regions, the roles of national governments and business are perceived to be important for sustainable development progress.

However, in Asia, North America and Oceania the future role of government is seen as more important than that of the private sector.

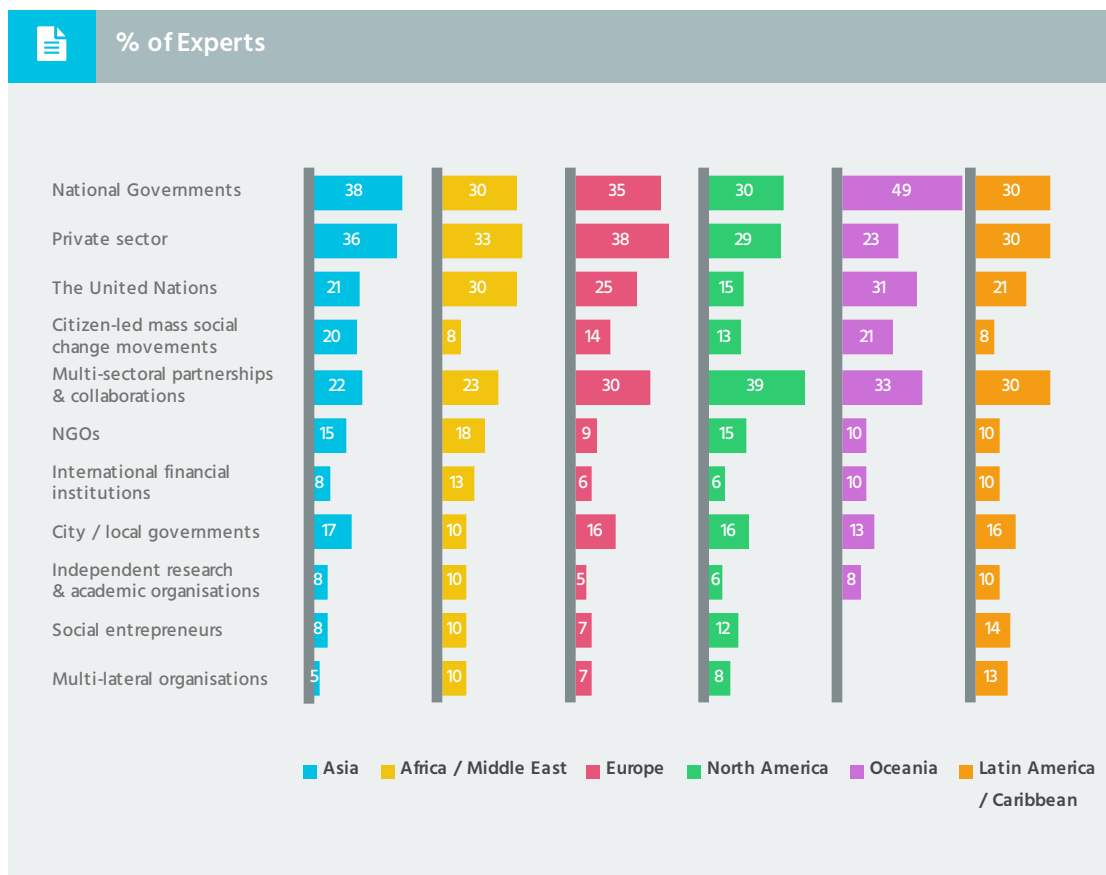
Experts outside of Europe and North America tend to view the UN as a more important player and respondents in all regions recognize that multi-sectoral partnerships should play a significant role in the next two decades.

“

Question

In your opinion, who should lead the sustainable development agenda over the next twenty years?

Please select the two most suited from the following list.



Corporate Leaders

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Unilever Maintains Top Position Among Global Companies

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Unilever continues to dominate the global corporate leadership ranking by a wide margin.

Close to half of all respondents mention the UK-based consumer goods giant as a leader on sustainability.

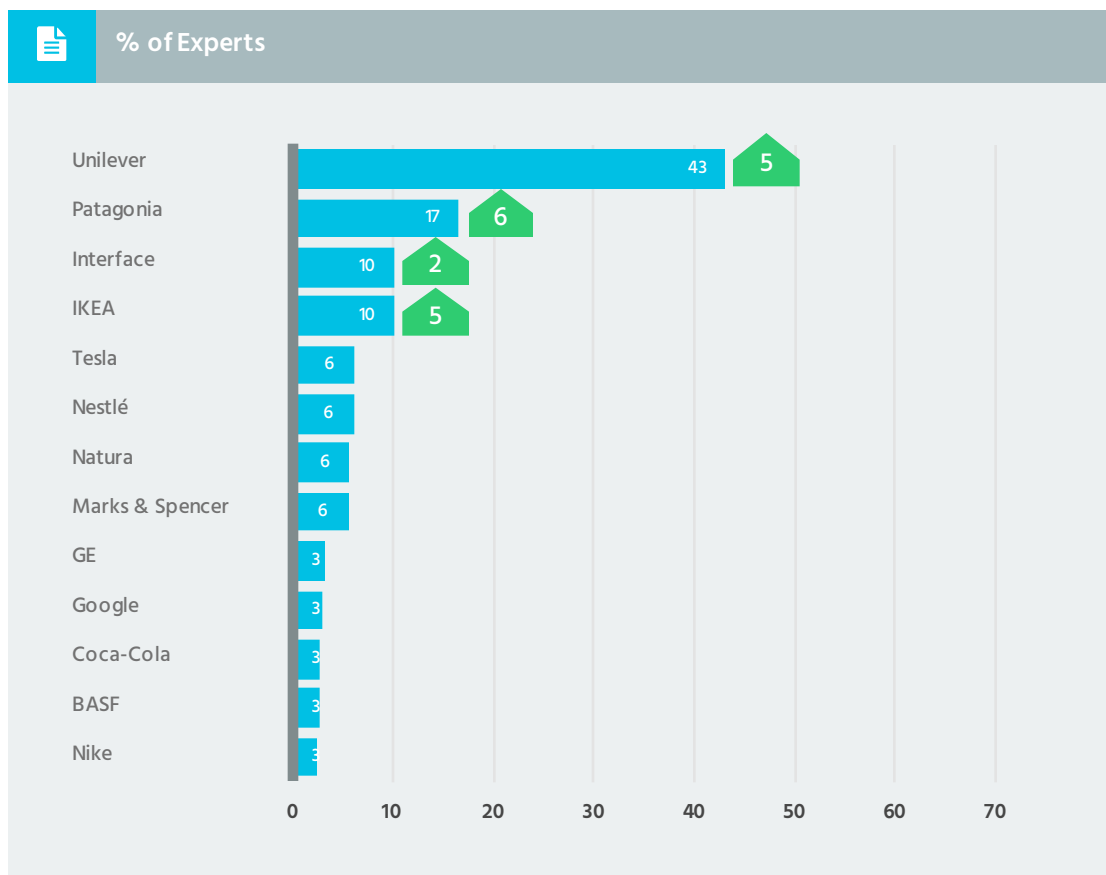
Compared to 2015, Patagonia and IKEA have received more endorsements this year, leading to a more even distribution of expert votes among the top-rated companies in the second-tier. Tesla, which is the only new entrant within the list of top 13, has also seen a significant boost in its reputation.

“

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.



Global Leadership Trends Since 1997

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The corporate leadership landscape has gone through many changes in the last two decades.

Six companies have reached the top position in the ranking since 1997: Dow, BP, Shell, Interface, Natura and Unilever, with the latter holding the record for leading the list for six consecutive years.

Large industrial companies (BP, Dow, GE) featured more prominently in the 1990s and 2000s but in recent years the ranking has been primarily dominated by consumer-facing companies (Patagonia, Nestlé, IKEA).

“

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.



Ranked Top 5 Companies



Regional Experts Agree on Global Leaders

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Unilever was the most frequently mentioned global corporate leader by experts in all regions, with the exception of Latin America, where Natura received slightly more votes.

Patagonia and Interface also appear among the top 5 global leaders mentioned by experts in all regions.

“

Question

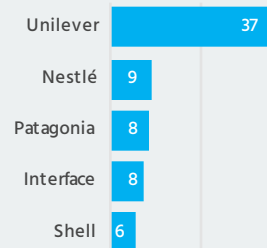
What specific companies do you think are leaders in integrating sustainability into their business strategy?

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

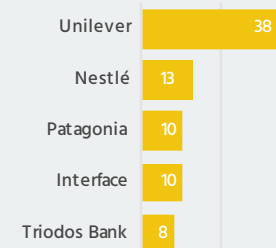


All Respondents, by Region

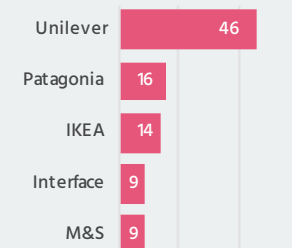
Asia



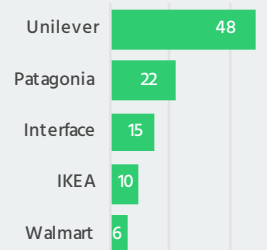
Africa



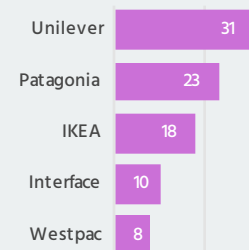
Europe



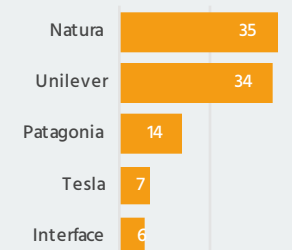
North America



Oceania



Latin America



Local Champions Top Regional Rankings

This year, we also asked experts to name corporate leaders in their home regions.

Consumer-facing companies lead the rankings of regional leaders in Europe, North America, Africa and Latin America, while India- headquartered Tata group of companies tops the Asia list.

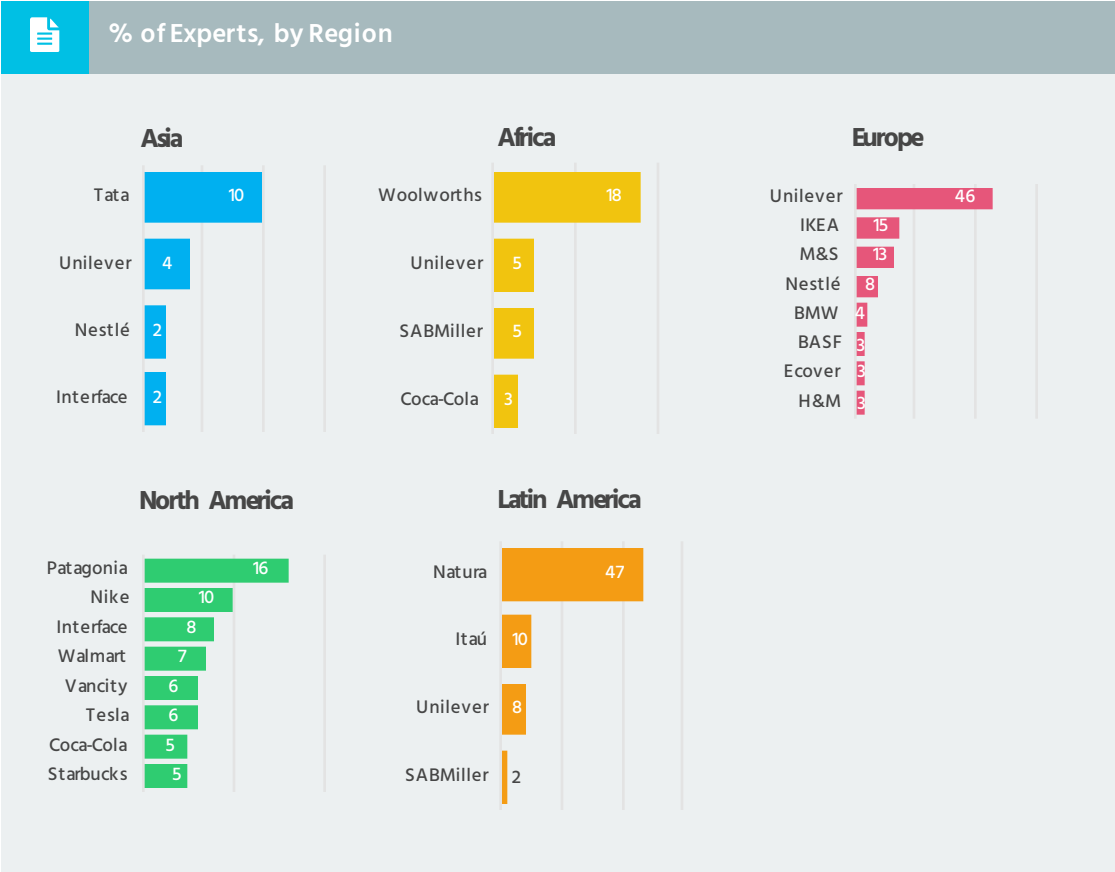
Natura leads by the widest margin, being mentioned by close to half of all experts in Latin America. The landscape in North America is the most competitive – while Patagonia heads the list, Nike, Interface and Walmart are close runners-up.

“

Question

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

Please enter a maximum of 3 companies.

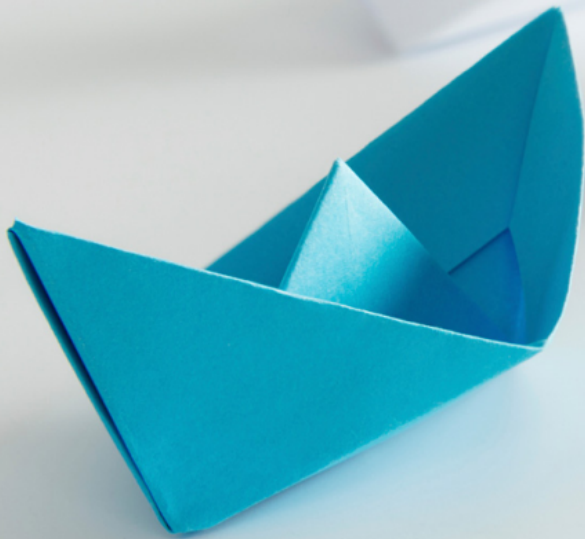


Anatomy of Corporate Leadership

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Values, Purpose and Integration Drive Corporate Reputation

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Leadership companies are seen to seek close alignment between sustainability strategy and their internal culture and values.

They are also thought to excel at integrating social and environmental purpose into core business. Corporate sustainability reputation is also seen to be driven (to a lesser extent) by business model innovation and ambitious goals.

“

Question

Please select the top 3 reasons that explain why you consider the company to be a leader and rank them in order of importance.



% of Experts, Prompted

Sustainability strategy is closely aligned with internal culture / values

Purpose integrated into core business via common brand promise

Pursuing business breakthrough model that drives net positive benefit

Applying ambitious goals and measures of performance

Leadership is vocally committed to sustainability

Expression of sustainability strategy through products

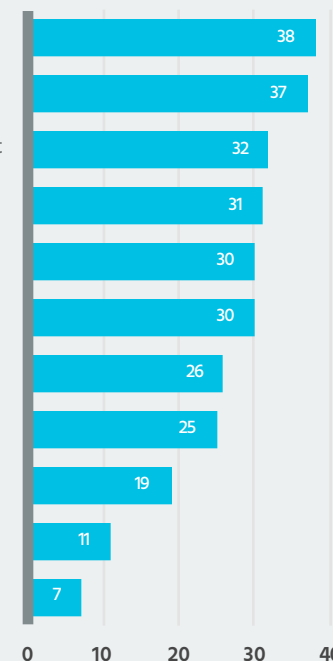
Collaborating with other organizations for system-level changes

Using brand to shift consumer behavior

Articulating vision for company's SD contribution

Clear commitment to transparency

Advocating for regulation/legislation to advance sustainability



Collaboration & Product Innovation Are Key to Progress on SDGs

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Experts believe the most effective way for companies to make a positive contribution towards the SDGs is by pursuing partnerships and via development and deployment of new products and services.

Respondents also recommend that the private sector apply the SDGs as a lens in goal-setting and risk analysis processes.

“

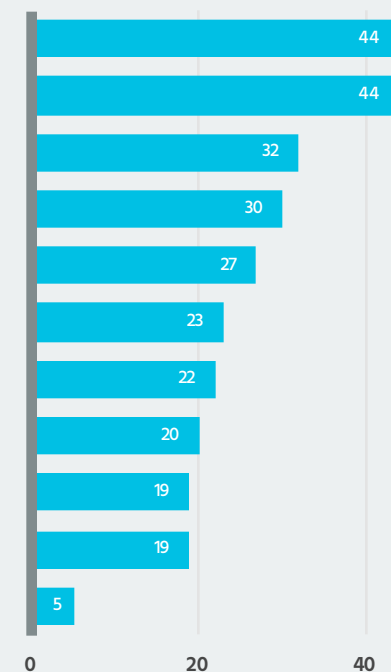
Question

Please select the three most effective ways in which individual companies can help to make progress toward the SDGs over the next five years.



% of Experts, Prompted

Pursuing partnerships/collaborations
Developing products/services in line with SDGs
Applying SDG as lens for setting sustainability goals
Applying SDGs to analyze core business risks/opportunities
Pursuing ambitious goals to reduce impacts
Advocating for policy/regulatory frameworks
Providing technology/data solutions
Tracking/reporting contribution to meeting priority SDGs
Pursuing ambitious "net positive" goals
Providing financing for solutions
Increasing philanthropic contributions



NGO & Government Leaders

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WWF Widens the Lead in Global NGO Ranking

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Among NGOs, World Wildlife Fund continues to be regarded as the global leader in advancing sustainable development, and it has widened its lead over Greenpeace and Oxfam, which are ranked second and third.

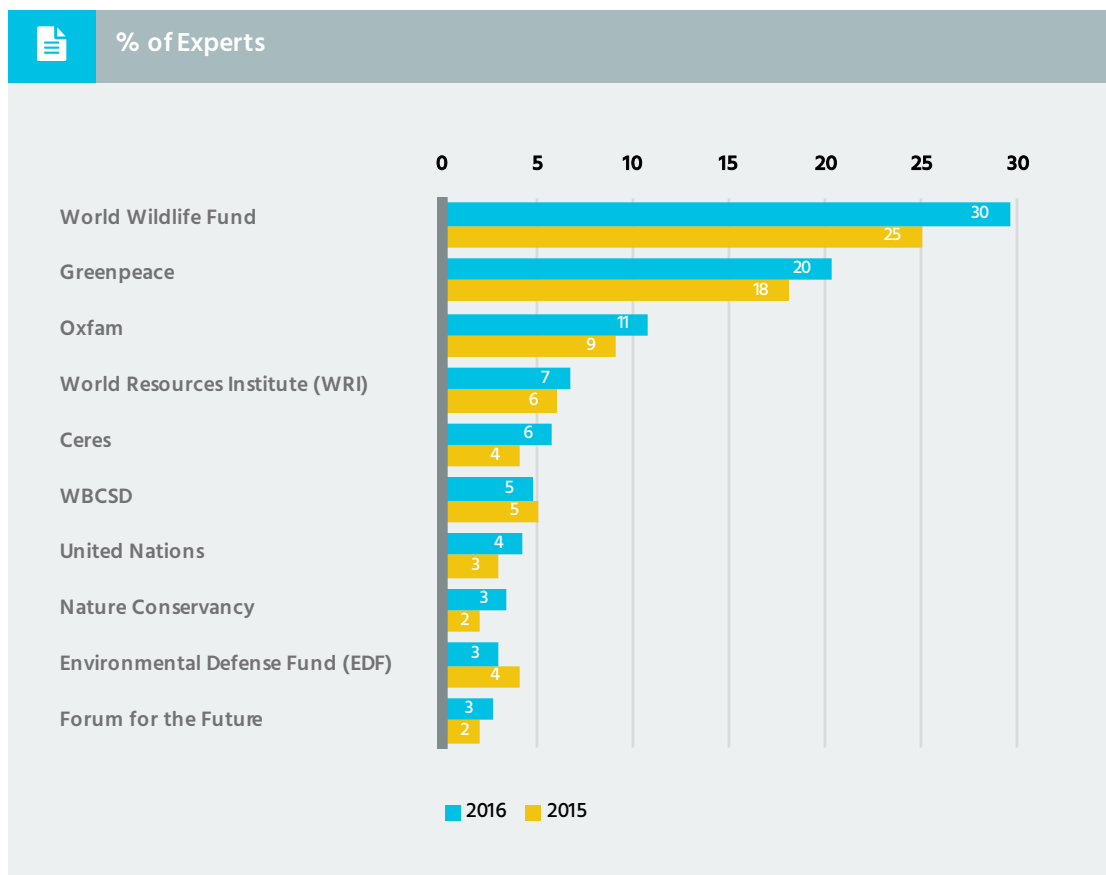
Forum for the Future is the only new entrant on the list of the top 10 NGO leaders.

“

Question

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

Please enter a maximum of 3 NGOs.



Nordic & German Governments Outpace Peers on Policy

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The Swedish government is most frequently named as the global leader on sustainable development.

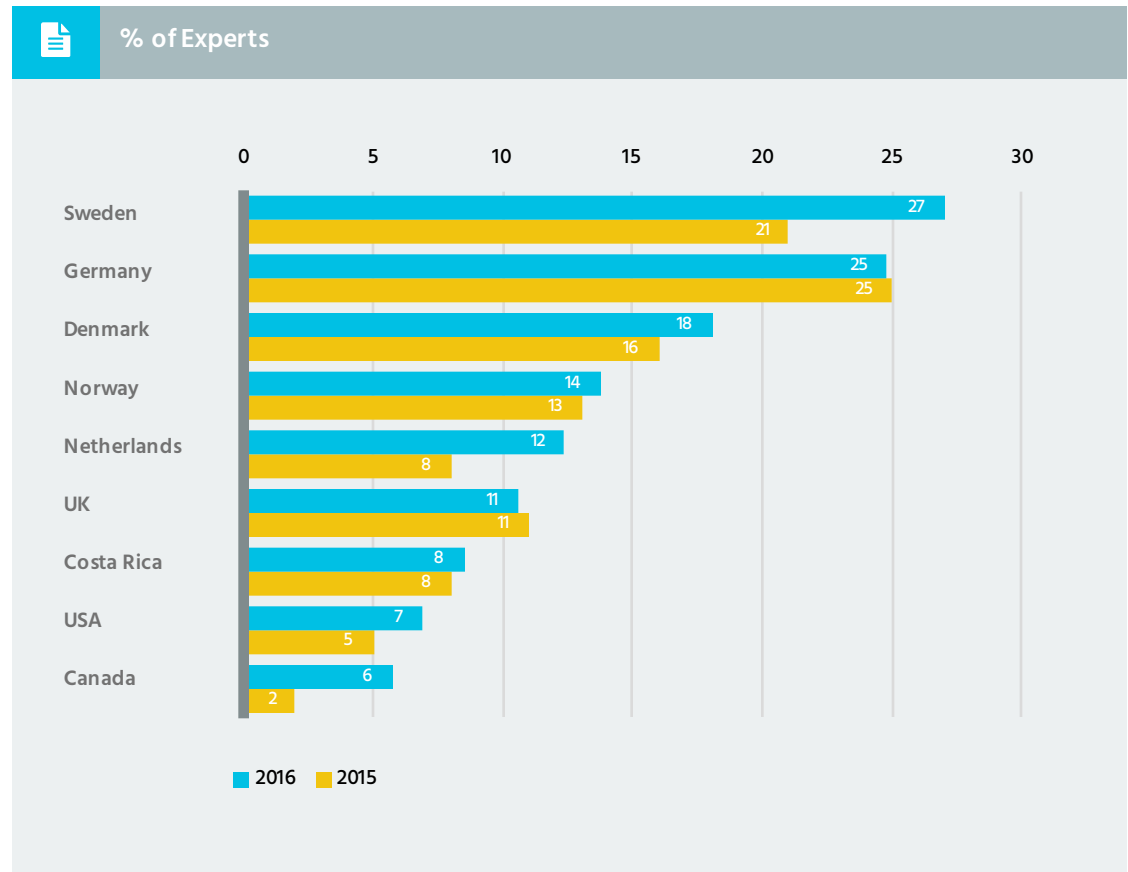
It is mentioned as a leader among states by more than one-quarter of respondents and is ahead of Germany and Scandinavian peers Denmark and Norway. Costa Rica continues to be the only country outside of Europe and North America on the top-ten list of governments.

“

Question

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

Please enter a maximum of 3 national governments.

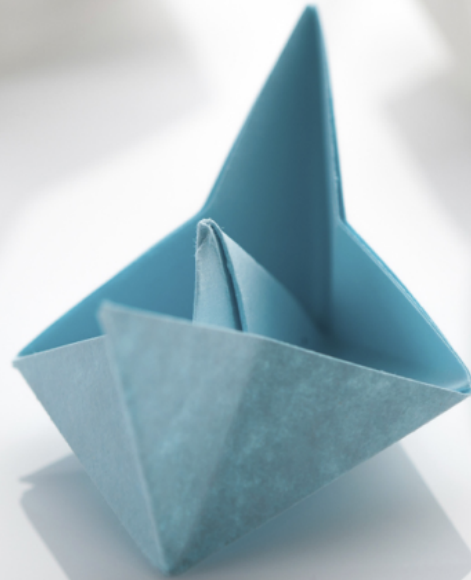


Industry Sector Leaders

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Experts Critical of Industry Sector Sustainability Efforts

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Experts are critical of industry sector efforts in managing the transition to sustainable development with all sectors receiving mostly negative or neutral ratings for their efforts.

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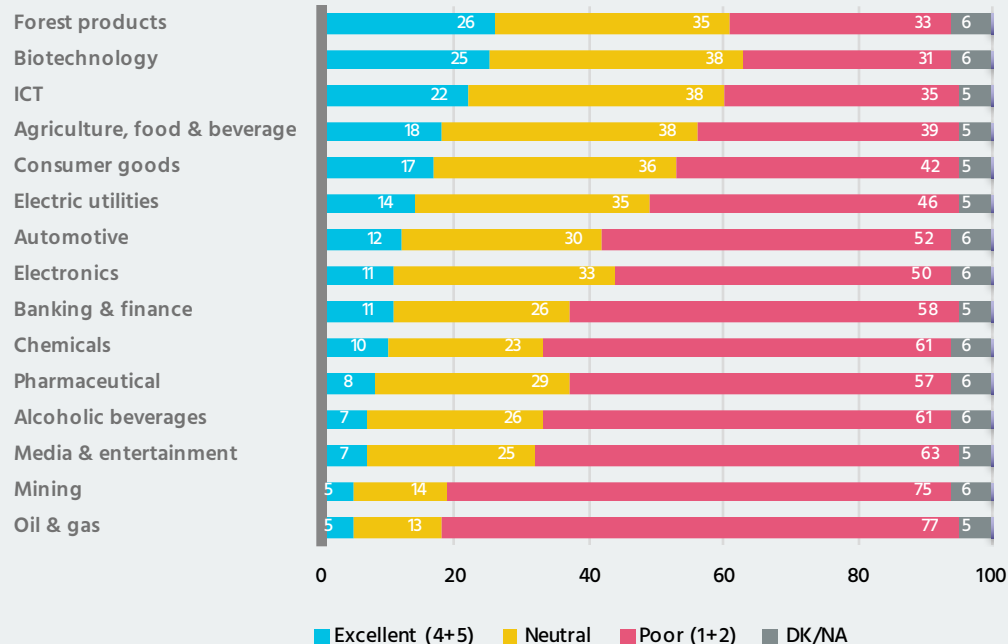
Question

Please rate how well each of the following industry sectors is managing its transition to sustainable development in your country or region.

Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").



% of Experts



Progress Since 2000: Forestry & Biotech Sectors In Pole Positions

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The forest products industry, biotechnology and ICT companies are considered by global experts to be most successful at managing the transition to sustainable development.

The life sciences and biotechnology sector has enjoyed an improving reputation over the last 16 years, while the perception of the forestry sector has worsened.

“

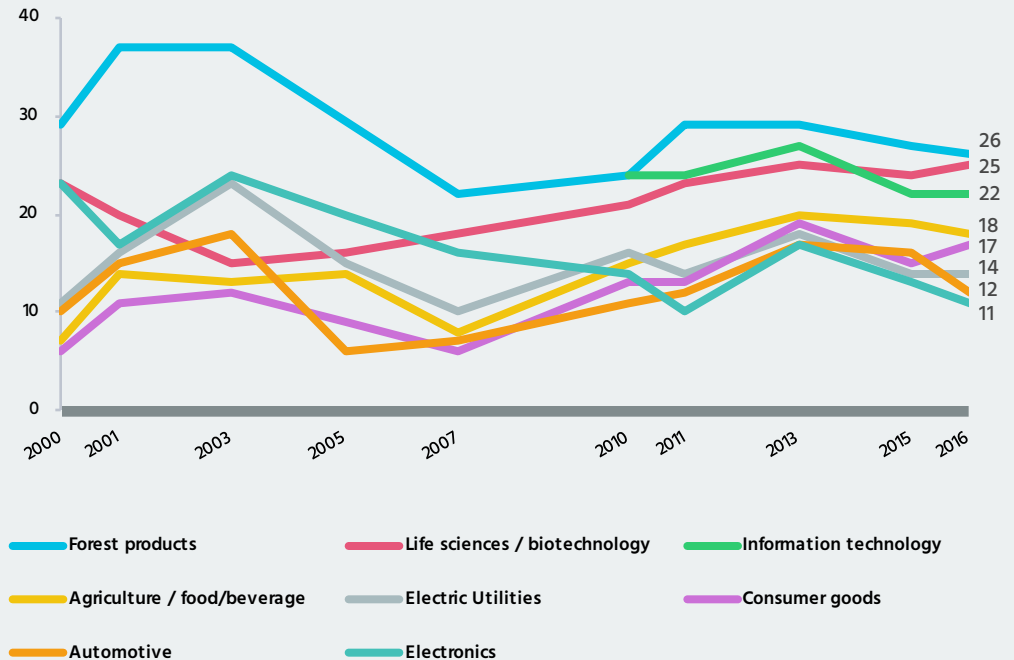
Question

Please rate how well each of the following industry sectors is managing its transition to sustainable development in your country or region.

Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").



% of Experts, "Good Performance" (4+5)



Progress Since 2000: Mining, Oil & Gas Companies Showing Worst Performance

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Oil & gas and mining industries are viewed extremely negatively by global experts, ranked worse than companies in other sectors for their efforts to transition to sustainable development. The chemical industry has seen the most dramatic fall in its reputation since 2000.

“

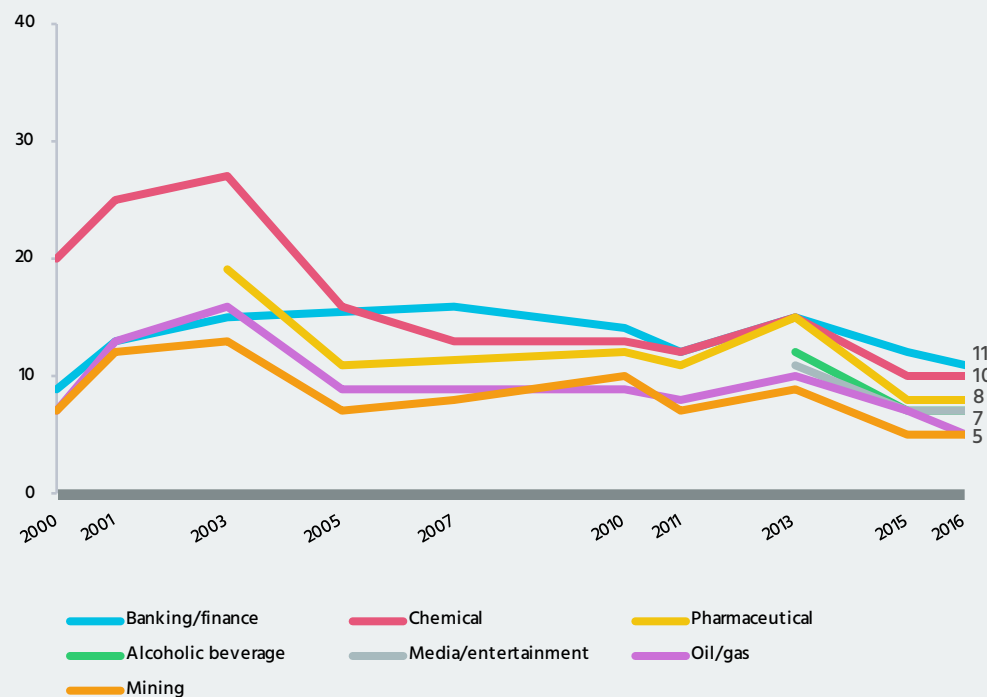
Question

Please rate how well each of the following industry sectors is managing its transition to sustainable development in your country or region.

Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").



% of Experts, "Good Performance" (4+5)



Further Information

For more information please contact...

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