



The 2018

GlobeScan - SustainAbility Leaders Survey Webinar



Welcome

To our 2018 Leaders Survey Webinar



Bron York
Analyst (presenter)
SustainAbility



Wander Meijer
Director Asia Pacific (moderator)
GlobeScan

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GlobeScan.com

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Panelists



Vivian Lau
President,
JA Asia Pacific



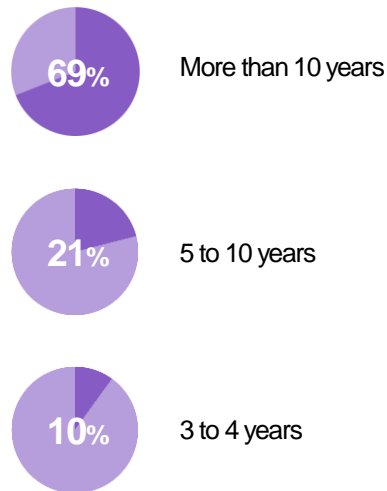
Pier Luigi Sigismondi
President, South East Asia and Australasia
Unilever

Survey Methodology

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

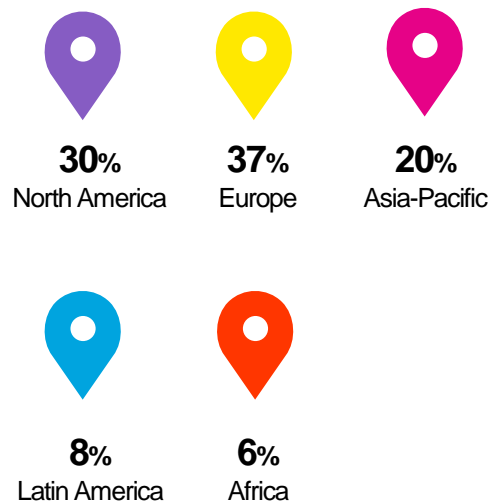
Experience

Respondents have the following experience working on sustainability issues:



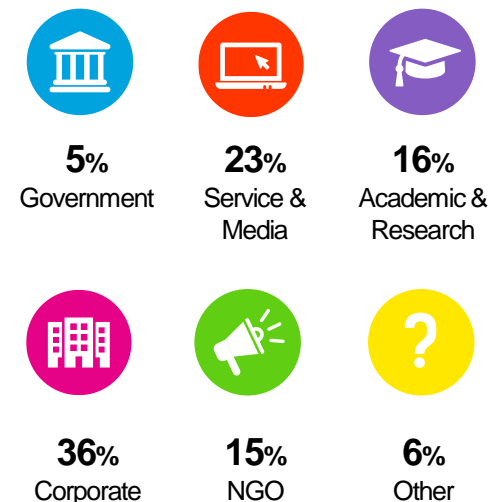
Geography

Experts surveyed span 70 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:

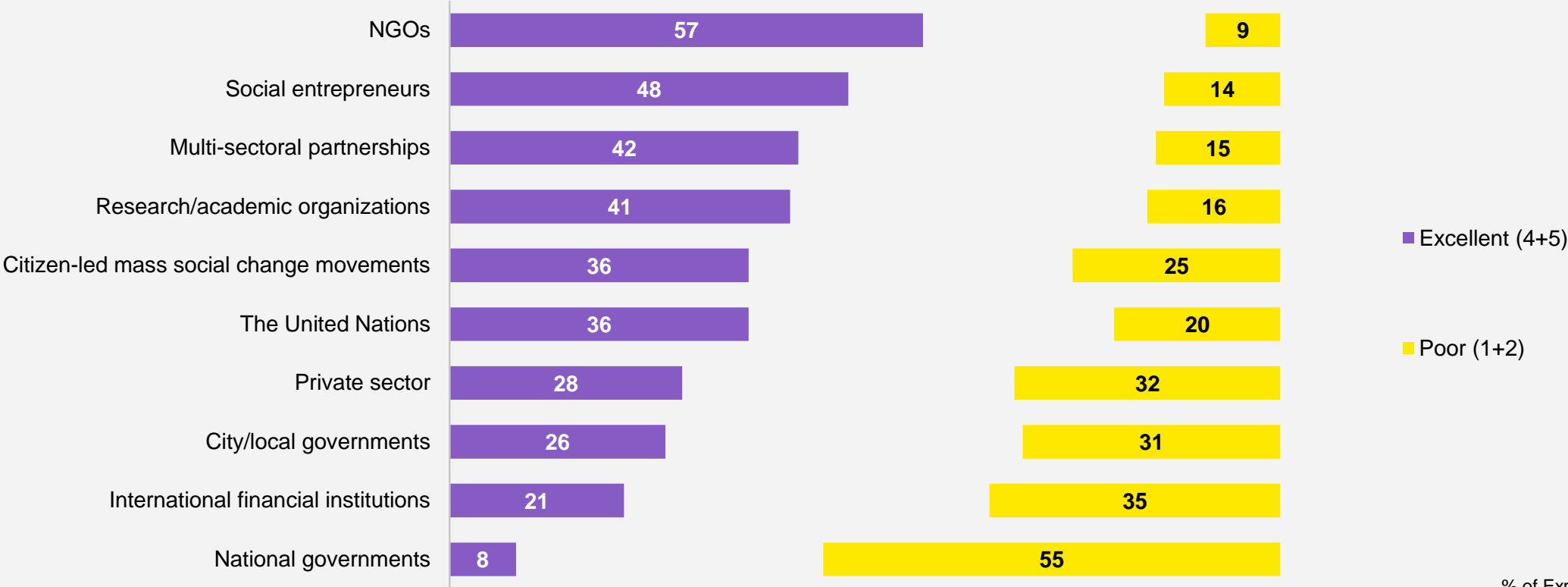


Institutional Leaders

Institutional Leaders

Non-State Actors Perceived as Strongest Performers

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”.*

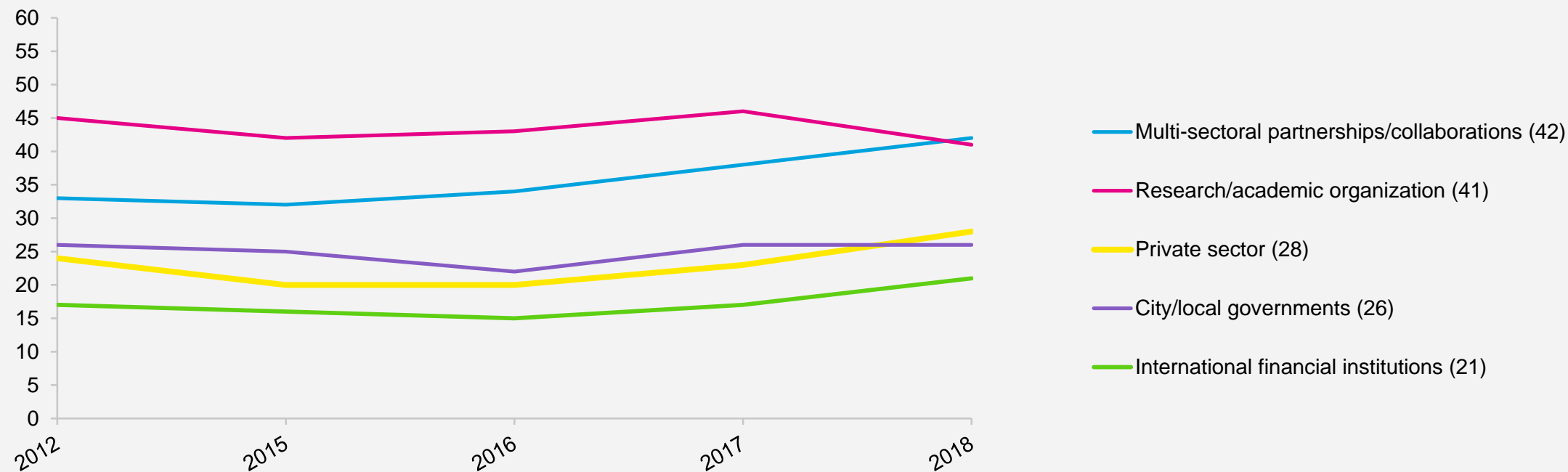


% of Experts, 2018

Institutional Leaders Trends

Research and Academic Organizations Perceived Performance Drops While Private Sector, Multi-Sectoral Partnerships and International Financial Institutions Ratings Increase

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.”*



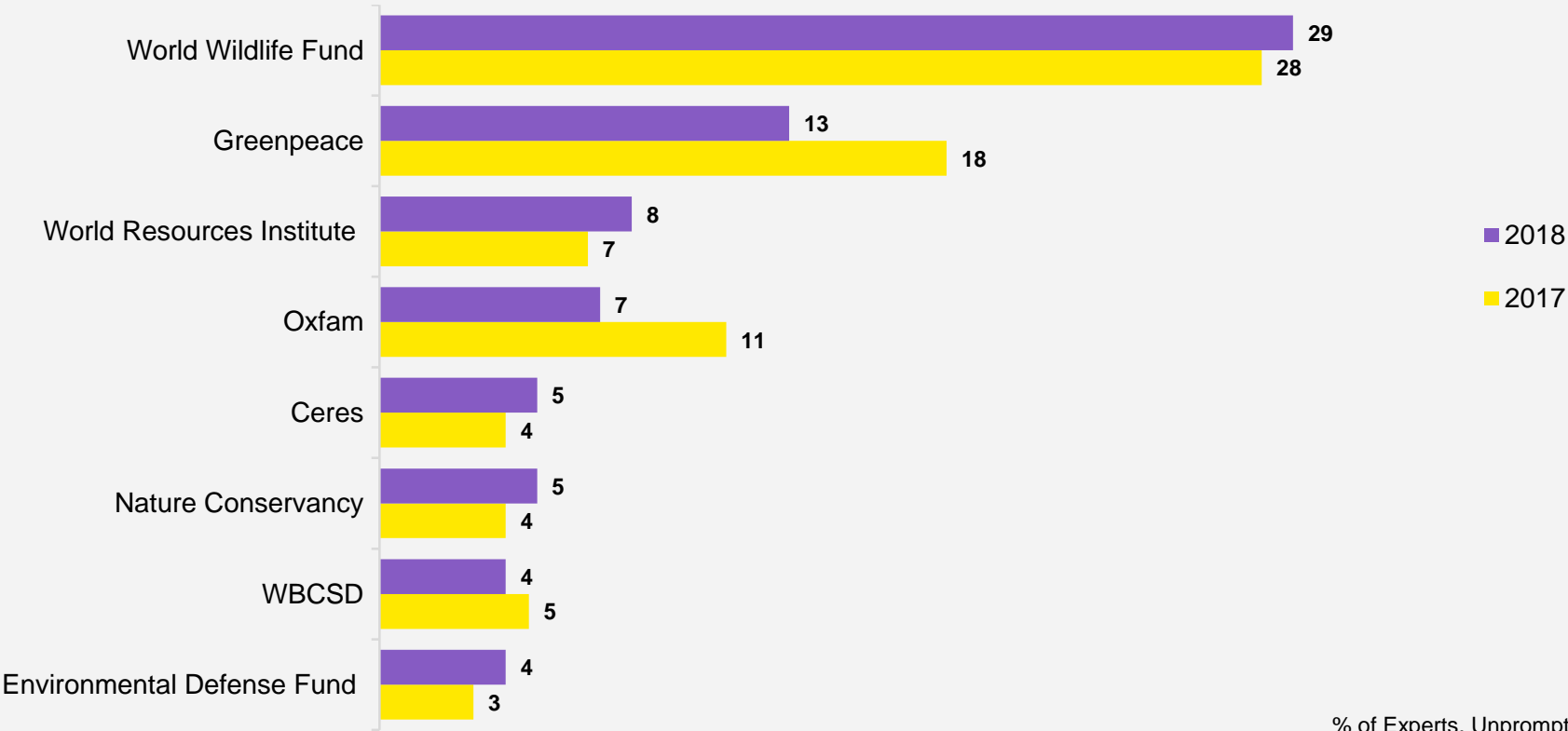
% of Experts, “Excellent” (4+5), 2012-2018

NGO Leaders

NGO Leaders

World Wildlife Fund Is the Most Widely Recognized NGO

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

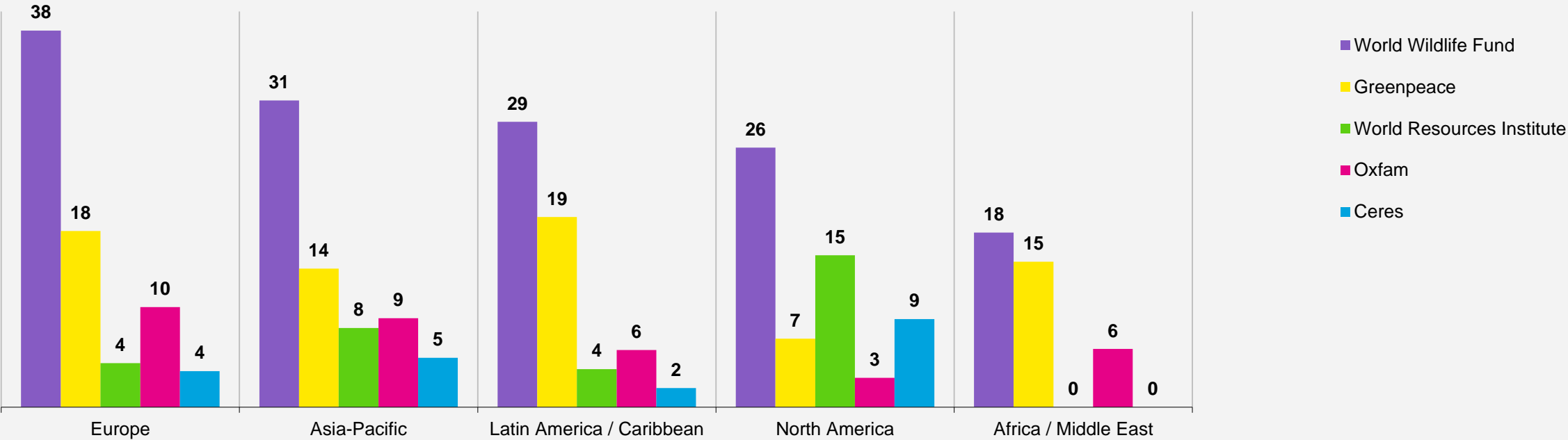


% of Experts, Unprompted, Total Mentions, 2017-2018

NGO Leaders

Among All Regions WWF Is the Most Widely Recognized NGO, Yet Ratings Vary Significantly

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



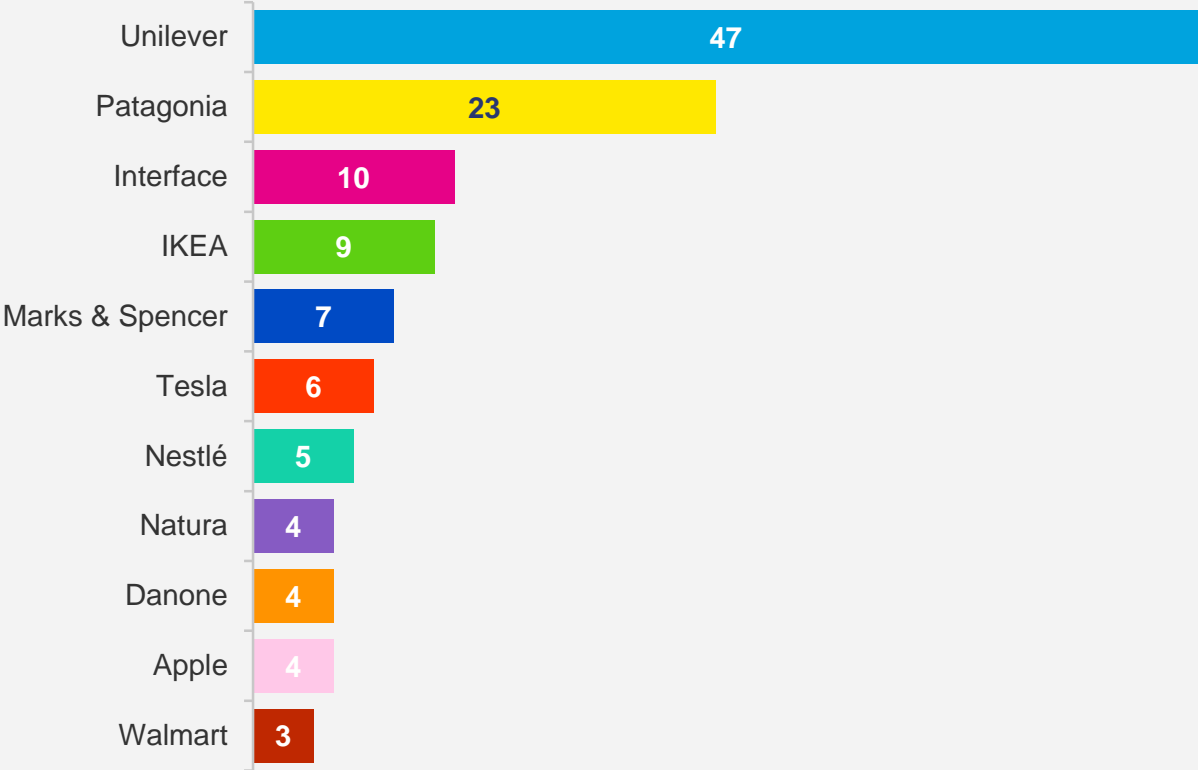
% of Experts, Unprompted, Total Mentions

Corporate Leaders

Corporate Leaders

Unilever, Patagonia and Interface Are Most Recognized Leaders

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

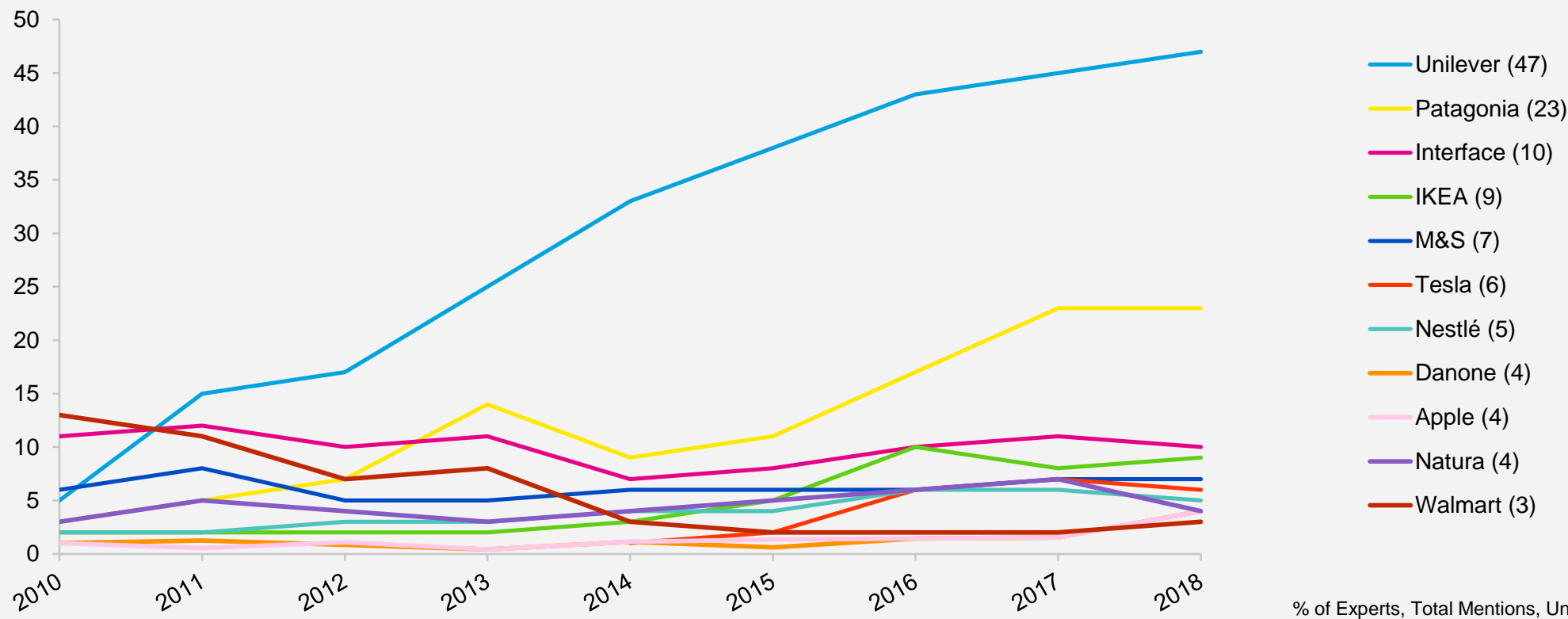


% of Experts, Total Mentions, Unprompted, 2018

Corporate Leaders

Unilever Leadership Recognition Continues

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

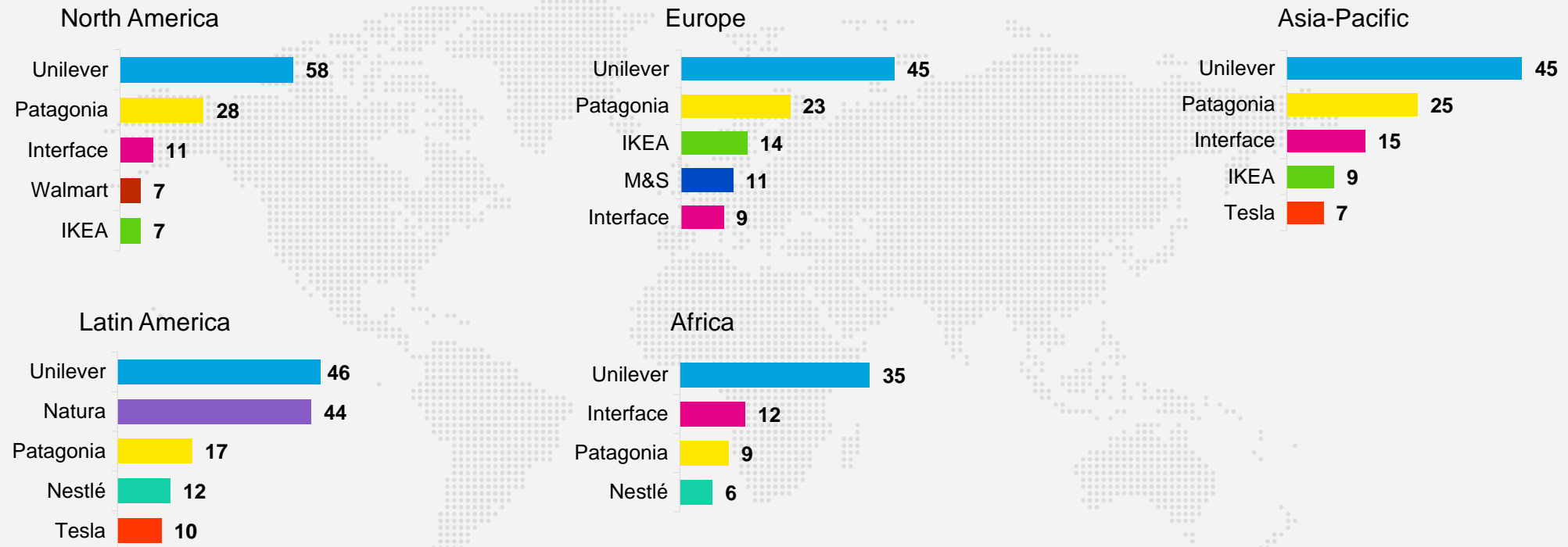


% of Experts, Total Mentions, Unprompted, 2010-2018

Corporate Leaders

Unilever, Patagonia Perform Well in All Regions

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



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

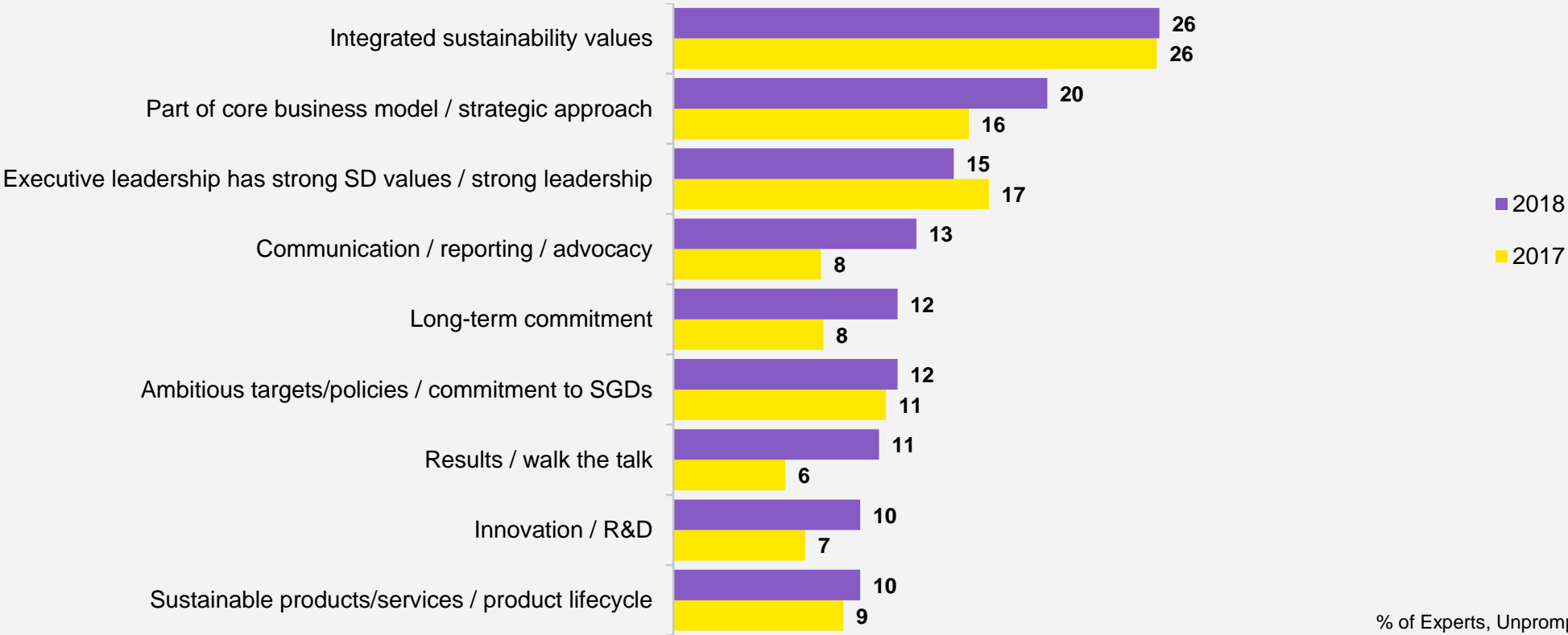
How Experts Define Corporate Leadership



How Experts Define Corporate Leadership

Values Drive Company Recognition

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.



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

How Experts Define Corporate Leadership

Why Companies Are Seen as Leaders: Select Quotes

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.

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**

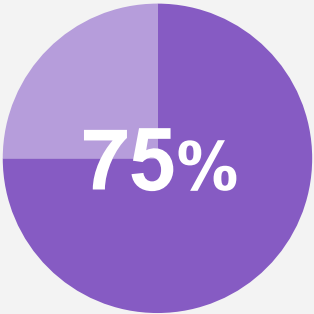
“Achieving traceability and transparency while seeking living wages for employees and suppliers through their supply chain work” – re: **Tesla**

Company Performance on Pre-Defined Leadership Attributes

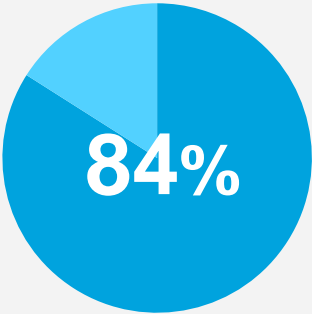
Company Performance on Pre-Defined Leadership Attributes

Performance of All Leading Companies on Attributes

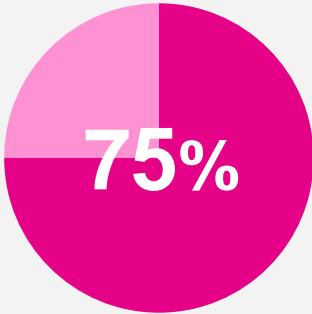
Question: Please rate how well [insert company #1 From Q2] performs in each of the following specific areas. *Please use a scale from 1 to 5 where 1 is “poor” and 5 is “excellent.” Asked only to those who named at least one company in Q2.*



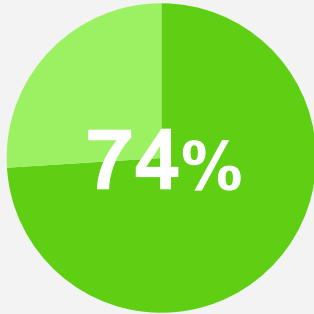
Purpose-driven



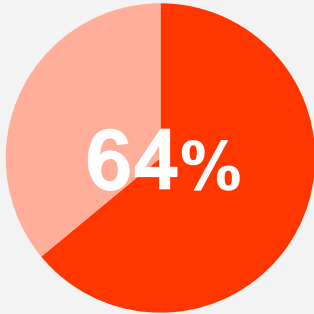
Plan



Corporate culture



Collaboration



Advocacy

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

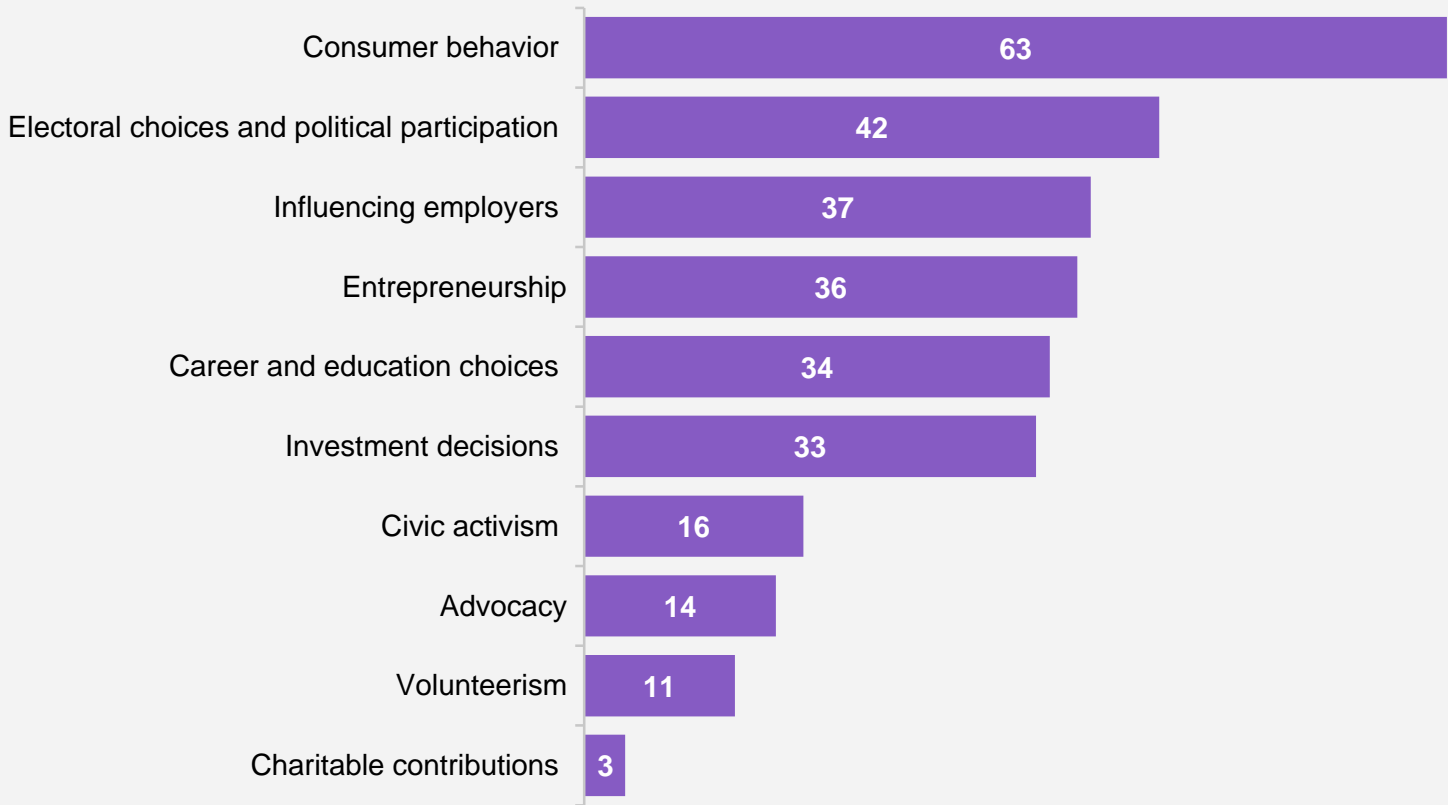
How Young Adults Can Influence the Sustainability Agenda



How Young Adults Can Influence the Sustainability Agenda

Consumer Behavior and Political Participation Perceived to Drive Most Sustainability Progress

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.

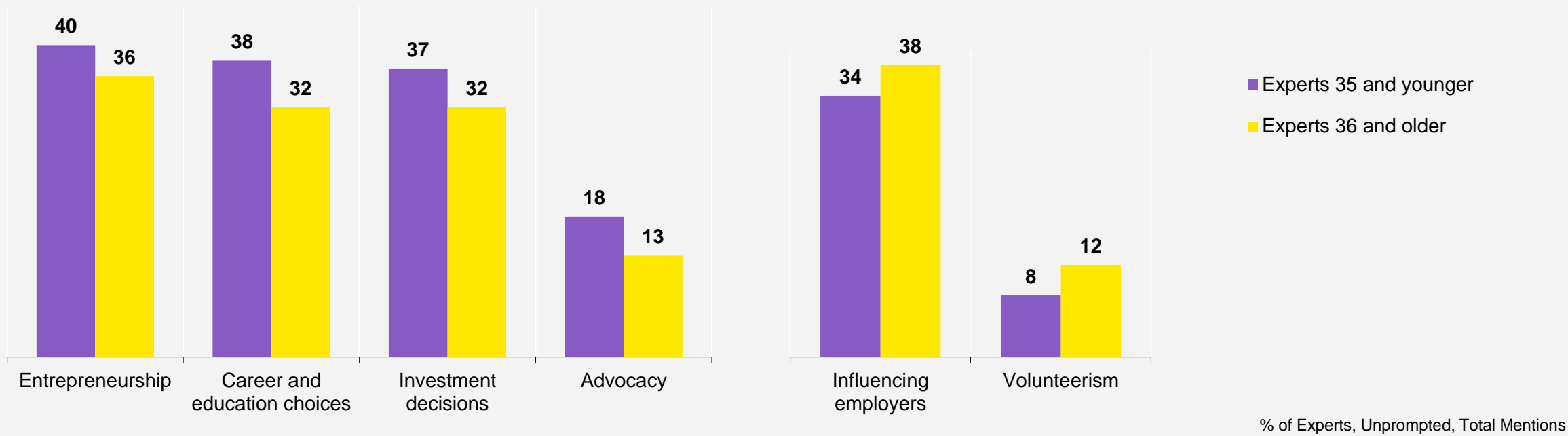


% of Experts, Unprompted, Total Mentions, 2018

Generational Differences

Younger Experts View Entrepreneurship, Advocacy, Career and Investment Choices as More Important to Advancing Sustainability than Older Experts

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.*



Discussion and Q&A



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