



Sustainability Leaders 2024

June 2024



ERM
SUSTAINABILITY
INSTITUTE

THE GLOBESCAN / ERM SUSTAINABILITY INSTITUTE RESEARCH PROGRAM



Contents

Introduction	3
Survey methodology	4
Key findings	5
Urgency of sustainability challenges	6
Breakthrough sustainability developments	9
Backlash against the sustainability agenda	16
Government leaders	19
NGO leaders	23
Corporate leaders	27
Regional corporate leadership	33
Sector performance on sustainability	35
About and acknowledgements	40

Introduction

The GlobeScan / ERM Sustainability Institute Leaders Survey captures the perspectives of hundreds of sustainability experts worldwide on the priorities and forces shaping the sustainable development agenda. The survey explores sustainability leadership across governments, NGOs, and companies, tracking priority issues as well as the most important recent developments. This year’s iteration was conducted between April 4 and May 30, 2024, and includes responses from approximately 500 sustainability experts across more than 60 countries.

While climate continues to be identified as the most important sustainability challenge, new factors are influencing the way respondents answer the survey. Experts agree that the expansion of sustainability-related legislation and regulation along with the creation and uptake of frameworks and standards are the most positive developments in the sustainability landscape over the past year. The research also identifies significant pushback against sustainability and ESG that some say is hindering progress. This pushback is most concentrated in North America, while other regions report less resistance to efforts to advance sustainability.

Corporate sustainability leadership continues to be defined by companies such as Patagonia, Unilever, Natura &Co., IKEA, and Interface. According to experts, the common thread among these corporate leaders is their ability to effectively integrate sustainability and demonstrate real impact and action along with their focus on supply chain issues. Governments such as Sweden, Germany, and Denmark are widely considered to be sustainability leaders, while the World Wildlife Fund is again the clear-cut leader in the NGO space.

Expanding sustainability-related legislation and standards is raising the bar for best practice. Leading organizations will need to translate compliance into tangible action to maximize impact while maintaining their positions as leaders. The evolving sustainability landscape demands an innovative yet unified approach from governments, NGOs, and corporates to continue driving progress. Collaboration among leaders will be essential to address the dynamic and multifaceted nature of sustainability issues and ensure a resilient and sustainable future for all.

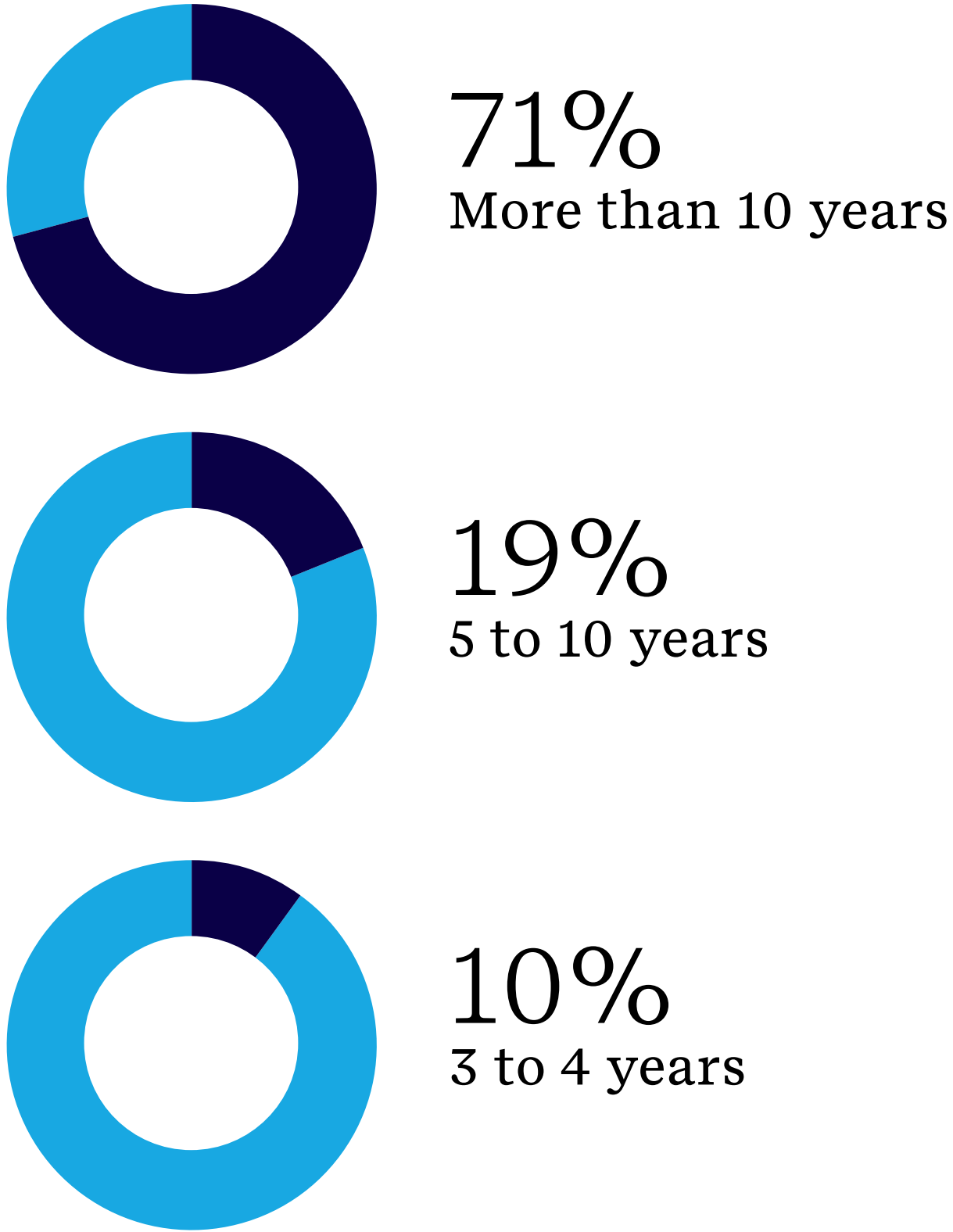


Survey methodology

A total of 484 qualified sustainability experts completed the online questionnaire from April 4th to May 30th, 2024. The survey was offered to respondents in Arabic, Chinese, French, Portuguese, Spanish, in addition to English.

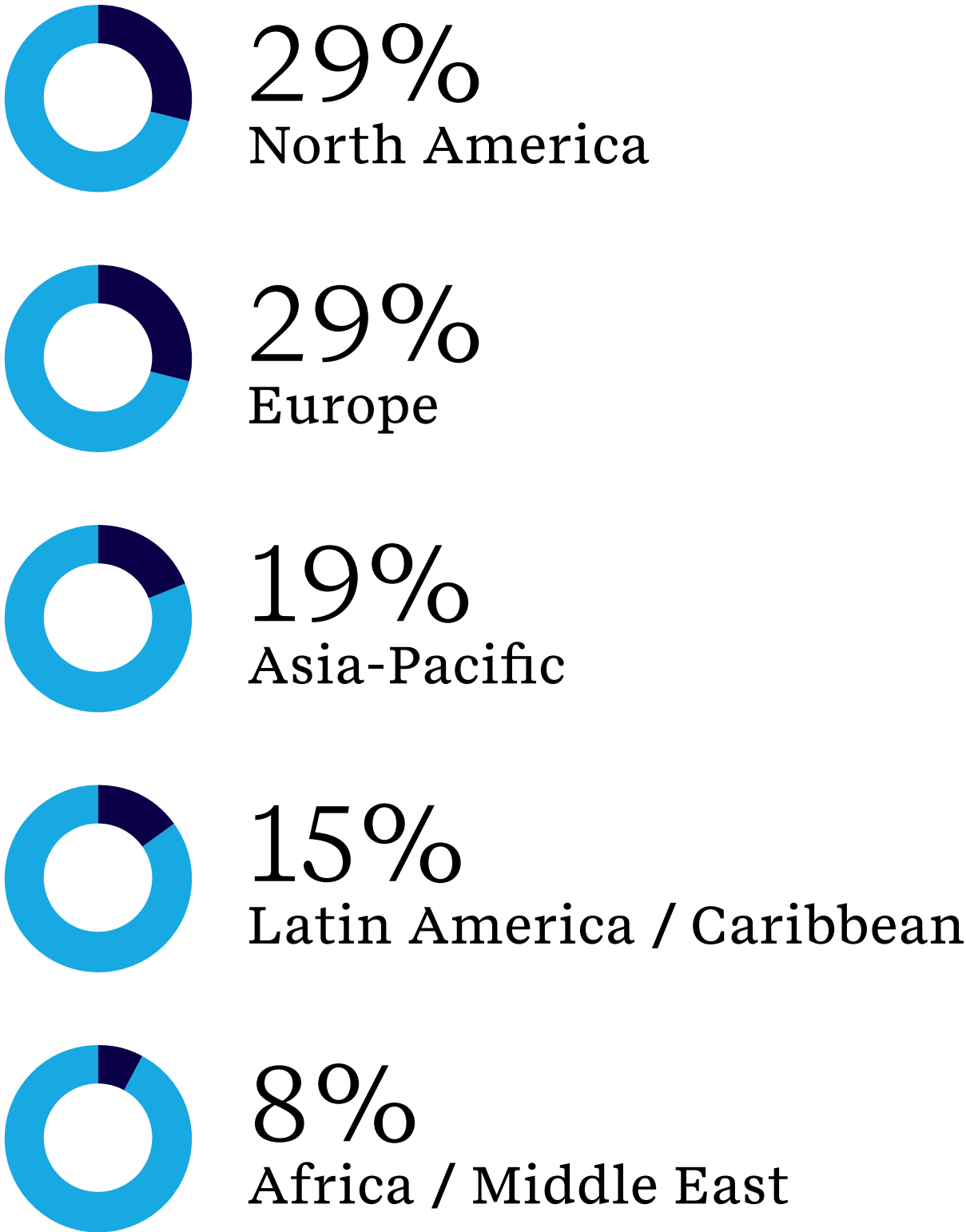
Experience

Respondents have the following experience working on sustainability issues:



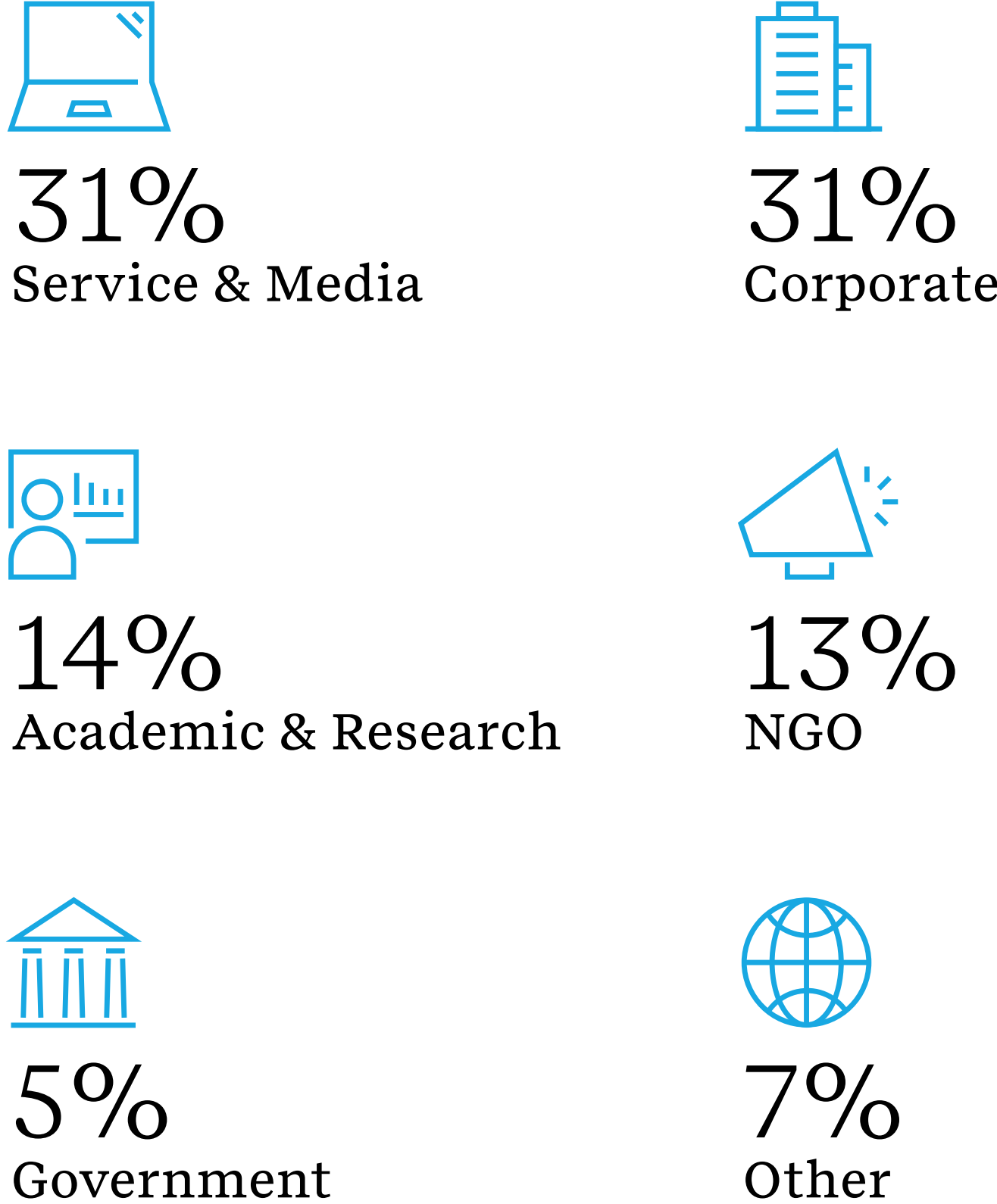
Geography

Experts surveyed span 65 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Key findings

Experts continue to rate climate change as the most urgent sustainability challenge.

Related issues of biodiversity loss, deforestation, and water scarcity are also seen as being among the most urgent sustainability issues while the perceived urgency of food security and water pollution has increased compared to 2023. The perceived urgency of food security has increased substantially over the past five years, suggesting the growing importance of this challenge that is deeply connected to climate change, water scarcity, and other interrelated sustainability challenges.

Legislation promoting sustainability is viewed as the most important positive development in the past year.

New sustainability disclosure standards, together with a range of actions around climate, nature, and specifically renewables and low-carbon initiatives are also viewed as important recent developments.

More than half of experts say there is a significant backlash against the sustainability agenda.

Over eight in ten North American experts claim there is currently a backlash, while those based in other regions are less convinced. Although respondents are split on whether a backlash will slow the transition to sustainability, experts based in North America, Europe, and Latin America and the Caribbean are much more likely than those in other regions to say that there will be a negative impact.

Sweden is recognized by experts as the leading government when it comes to advancing sustainable development.

The Nordic countries and Germany dominate recognition for sustainability leadership, with Norway and Finland also likely to be top-of-mind as sustainability leaders along with Sweden and Germany. Costa Rica stands out as a recognized leading government from Latin America.

World Wildlife Fund continues to be the most recognized NGO leading on sustainable development.

World Wildlife Fund has remained the most recognized NGO among our panel of sustainability experts over the past decade. Greenpeace, The Nature Conservancy, and World Resources Institute also continue to be recognized as leading NGOs.

Patagonia is cited by one-third of experts as a corporate sustainability leader.

One-quarter of respondents name Unilever, while just over one in ten spontaneously mention Natura &Co and IKEA. The top tier of most-recognized sustainability leaders is rounded out by Interface, Danone, Nestlé, Microsoft, Ørsted, Schneider Electric, and Tesla, among more than three hundred different companies mentioned. Integrated sustainability and demonstrating real impacts and action continue to be key drivers of recognized sustainability leadership, and experts are also increasingly mentioning a focus on the supply chain as a reason for recognition.

The forest products and life sciences sectors are viewed most positively by experts on sustainability.

Perceptions of how well sectors are managing their transition to sustainability have improved for most of the sectors rated, but the chemicals and extractive sectors are seen to be performing worse on sustainability than they did a decade ago.

Urgency of sustainability challenges



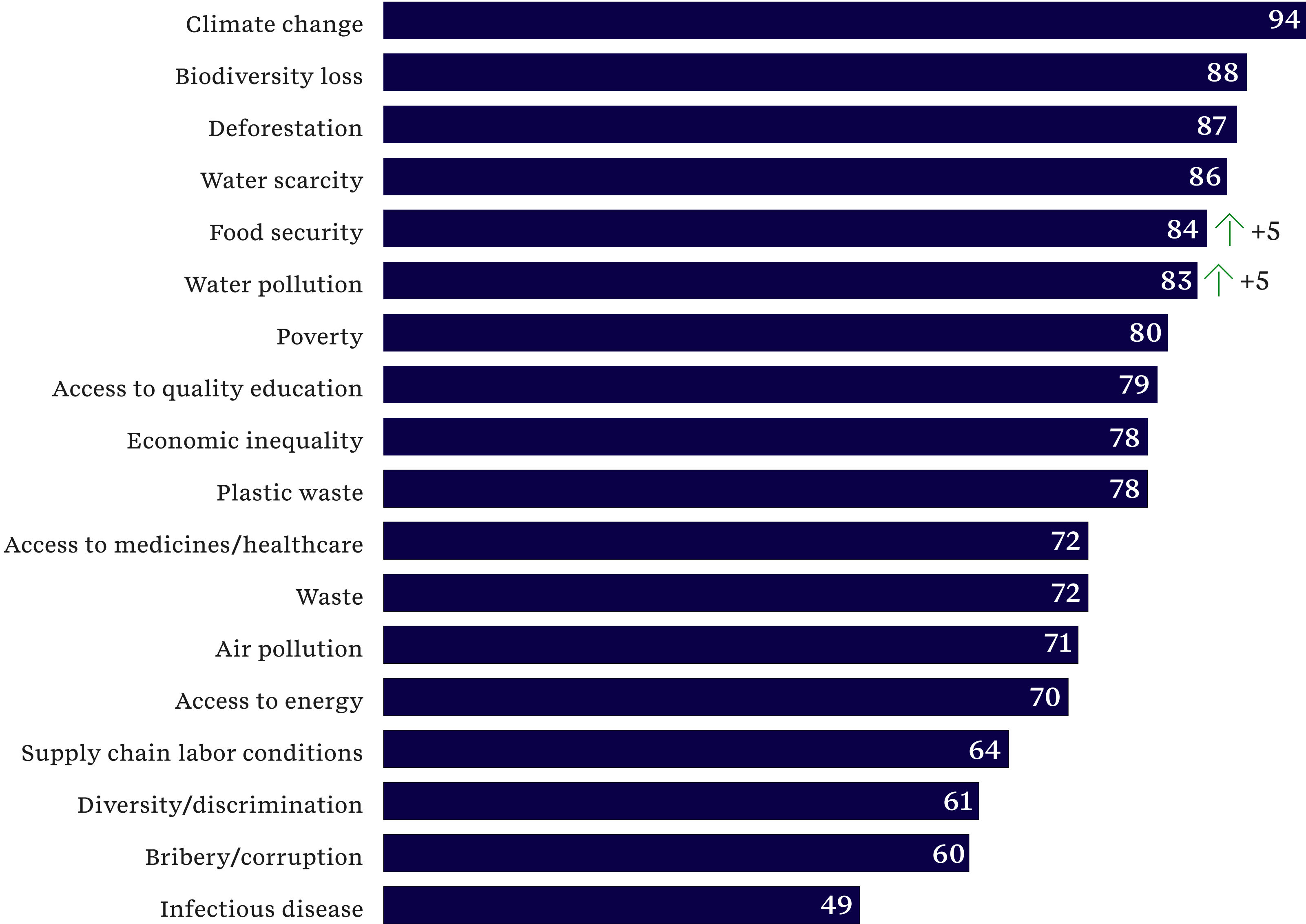
Experts rate climate change as the most urgent sustainability challenge

Climate change continues to be perceived by experts as the most urgent challenge, with biodiversity loss, deforestation, and water scarcity again following closely behind. Food security and water pollution are rated as more urgent than last year by our panel of sustainability experts. The perceived urgency of other issues is similar to 2023.

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.”



● 2024 ↑ Change from 2023 (+ 5 points)

% of Experts, “Urgent” (4+5), 2023–2024

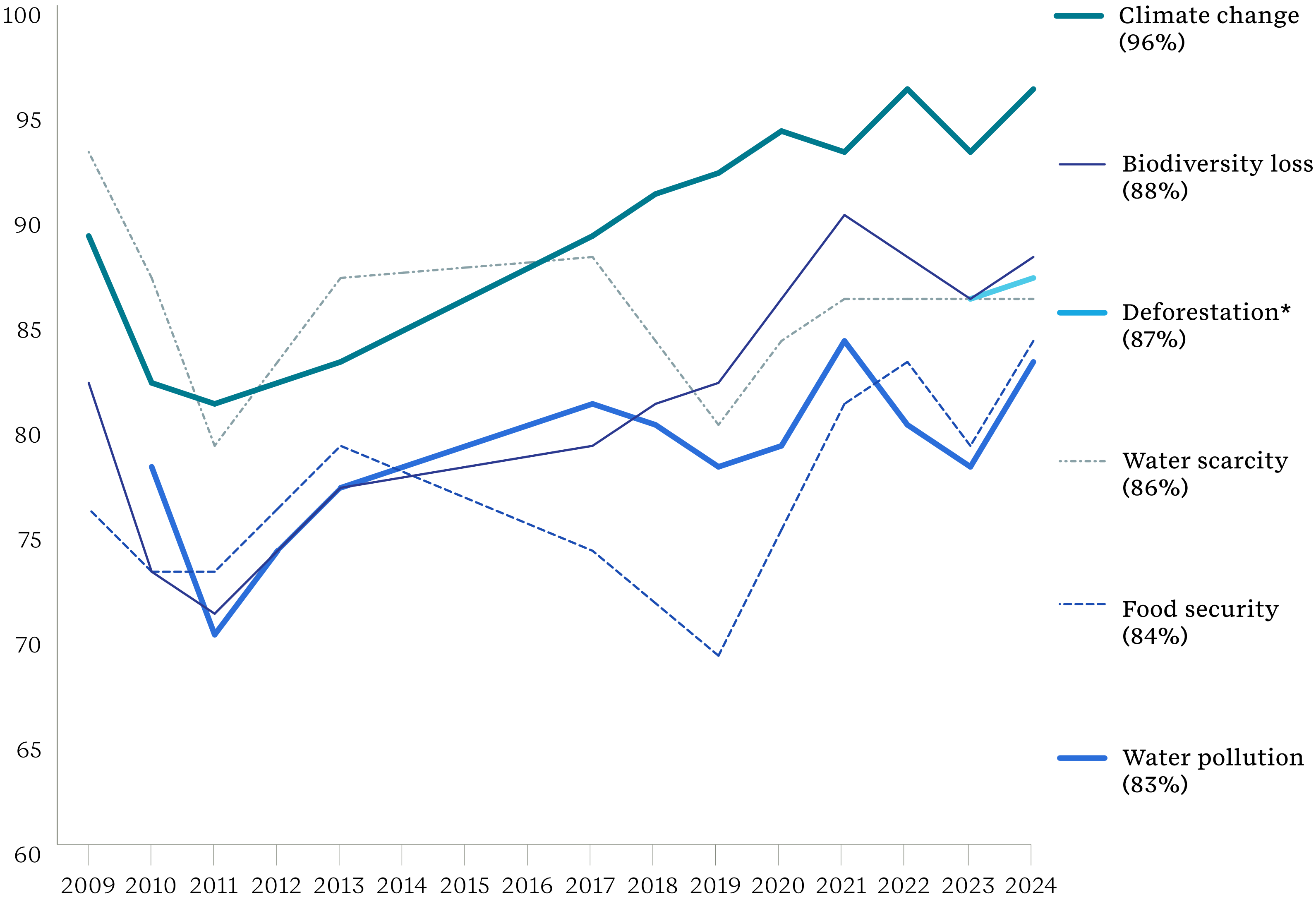
Perceived urgency of food security has increased a growing climate-food nexus

Experts continue to rate the top six sustainability challenges as extremely urgent, with the perceived urgency of most of these issues having increased significantly over the past decade. There is also increased concern about water pollution and food security, with perceptions of food security as a sustainability development challenge having increased dramatically over the past five years.

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.”



% of Experts, "Urgent" (4+5), 2009–2024

*Asked only in 2023 and 2024

Breakthrough sustainability developments

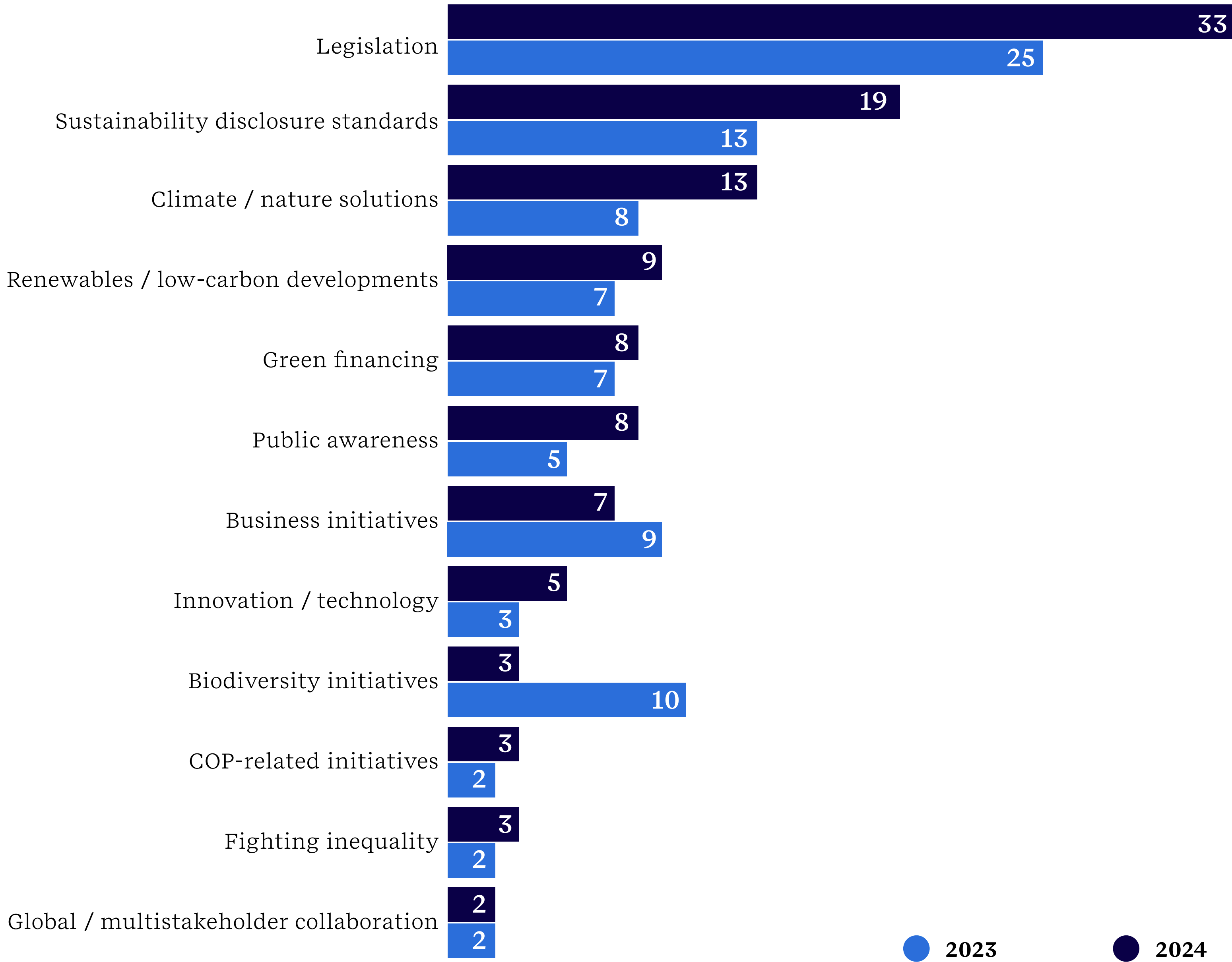


Increasingly, experts deem new legislation and disclosure standards to be most significant recent sustainability developments

Similar to last year, experts again point to new legislation as having the most positive impact on the sustainability agenda in the past year, with one-third of experts now mentioning legislative action as a recent breakthrough. Experts also increasingly emphasize new sustainability disclosure standards as important for moving the agenda forward, together with a range of action around climate, nature, and specifically renewables and low-carbon initiatives. More financing and public awareness are also seen as important positive developments in the past year.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.



% of Experts, Unprompted, 2023–2024

Legislation and emergence of sustainability disclosure standards are viewed as most positive developments by experts in all sectors

New legislation and disclosure standards are recognized by experts as the most significant developments across all sectors, but even more so among sustainability professionals in the for-profit sectors. However, experts based in Africa and the Middle East instead point to increased public awareness as the most significant positive development.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

	Most positively viewed development	2 nd most positively viewed development	3 rd most positively viewed development
NGO	Legislation 31%	Sustainability disclosure standards 16%	Climate/nature solutions 13%
Academia & Research	Legislation 28%	Sustainability disclosure standards 16%	Public awareness 13%
Corporate	Legislation 33%	Sustainability disclosure standards 24%	Renewables / low-carbon developments 11%
Service & Media	Legislation 35%	Sustainability disclosure standards 20%	Climate/nature solutions 14%

% of Experts, by Sector, Unprompted, 2024
 NOTE: Government sector was not included in this analysis due to small sample size

Experts in Europe and the Americas highlight legislation as the most important development, while experts in Africa and the Middle East point to increased public awareness and those in Asia-Pacific are more likely to mention new disclosure standards

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

	Most positively viewed development	2 nd most positively viewed development	3 rd most positively viewed development
Africa / Middle East	Public awareness 22%	Legislation Green financing Renewables / low-carbon developments Climate/nature solutions 15% each	Fighting inequality 10%
Asia-Pacific	Sustainability disclosure standards 26%	Legislation 23%	Renewables / low-carbon developments 12%
Europe	Legislation 38%	Sustainability disclosure standards 18%	Climate/nature solutions 13%
Latin America / Caribbean	Legislation 33%	Climate/nature solutions 25%	Green financing 13%
North America	Legislation 38%	Sustainability disclosure standards 24%	Green financing 15%

% of Experts, by Region, Unprompted, 2024

Recent positive sustainability developments:

Quotes from experts


Below we share some verbatim quotes from respondents around the world on the most significant positive action or development they have observed over the past 12 months.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

“Mandatory ESG disclosures in many countries, but especially in Europe, will lead to companies building their ESG strategies, leading to a more sustainable and equal planet.”

– Corporate, Netherlands



“EU parliament criminalized serious cases of environmental damage tantamount to ‘ecocide’, becoming the first international body to do so.”

– Think Tank, Egypt

“The progress of reporting and transparency on ESG and the creation of holistic and concise reports. The realization that CSR and sustainability are not PR exercises, but are critical to survival.”

– Academia, India

“The scale and number of companies that signed up on the TNFD Early Adopters scheme is one of the indicators on how the private sector is feeling risks and opportunities of biodiversity loss and nature-positive transition.”

– NGO, Japan

Recent positive sustainability developments:

Quotes from experts

Below we share some verbatim quotes from respondents around the world on the most significant positive action or development they have observed over the past 12 months.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.



“The launch of the Circular Economy Roadmap.”

– Government, Nigeria

“Increased awareness about climate justice, with greater attention paid to inequalities in the ability to face the impacts of climate change and the equitable distribution of sustainable solutions benefits; significant commitments to achieve carbon neutrality by 2050 advancing renewable energy such as solar and wind.”

– Corporate, Brazil

“The momentum behind the SBTi organization. It is seen as the go-to organization for validating climate targets, and more and more companies are submitting targets for their validation.”

– Corporate, UK

“Interventions by the National Green Tribunal and bolstering of its actions by the Supreme Court of India.”

– Government, India

“COP28 was the most critical event where the first ever global stock-take is set to conclude.”

– Corporate, Turkey



Recent positive sustainability developments:

Quotes from experts

Below we share some verbatim quotes from respondents around the world on the most significant positive action or development they have observed over the past 12 months.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

“Civil action against large corporations exploiting our biodiverse coastlines for gas and oil. Civil cases against companies exploiting land for mining purposes by communities who wish to preserve and protect their way of life.”

– Corporate, South Africa

“Ireland’s Legally Binding Climate Act has moved debate from being about an abstract target for change to a mandate for change. This has not had large-scale public opposition. Industry and civil society are collectively trying to find solutions to meet our legal obligations.”

– Corporate, Ireland

“Multiple Scientific and UN sponsored groups leading an intellectual and evidence-based thrust to stress the importance. However, in general, most governments don’t really take it seriously as the majority of people don’t really understand its importance and are unwilling to change – they’re greedy.”

– Other, USA

“The release of the International Sustainability Standards Board reporting frameworks, IFRS 1 and IFRS 2. This hopefully will get many types of companies to report in a similar fashion (particularly those who weren’t voluntarily reporting to CDP).”

– Corporate, USA

“Increasing uptake of NBS; advancements in AI related to sustainability; ongoing mainstreaming of electric vehicles; the ongoing rise of corporate finance (green bonds); overall greater recognition of nature and water in addition to climate.”

– NGO, Canada

Backlash against the sustainability agenda

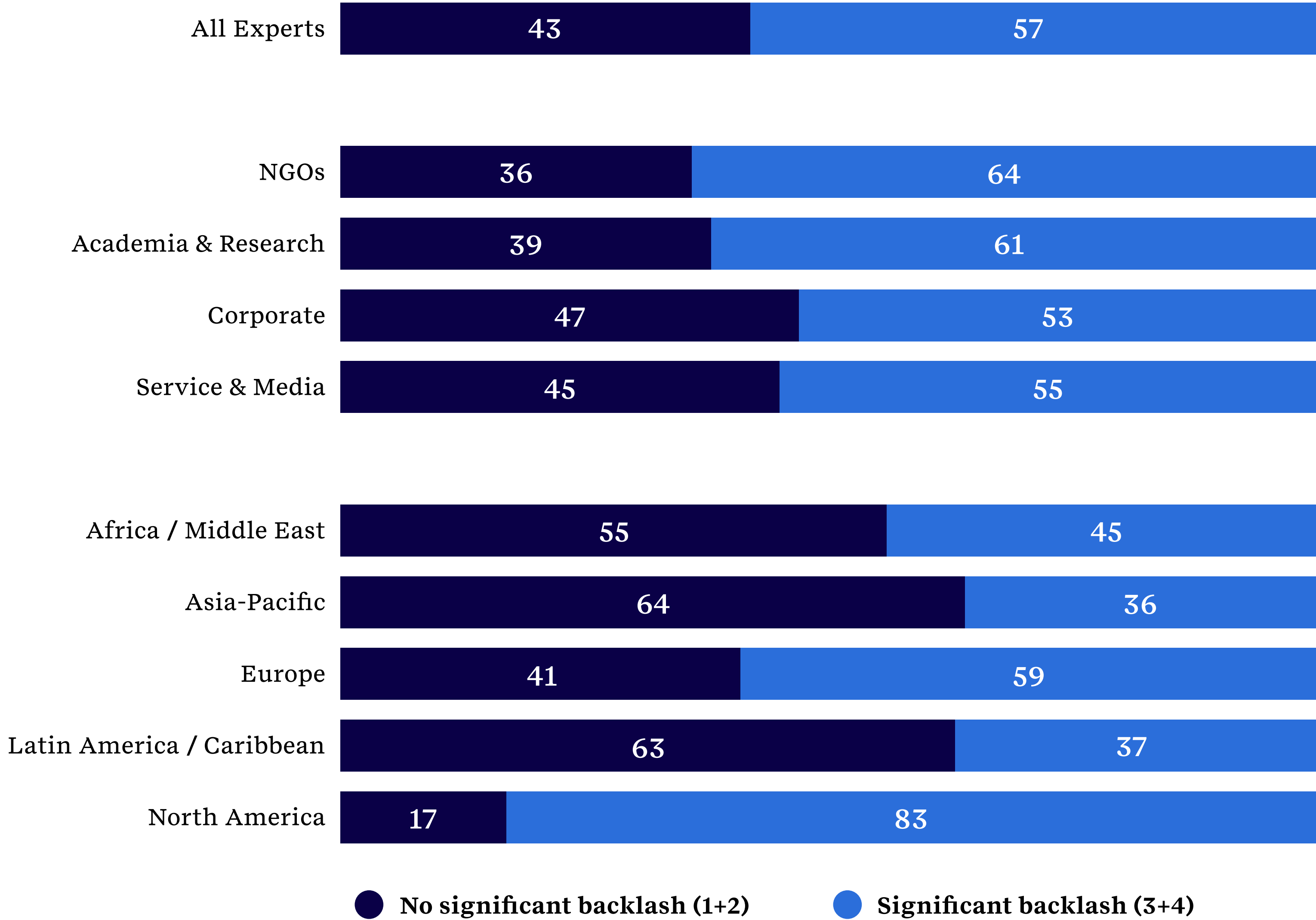


More than half of experts say there is a significant backlash against the sustainability agenda, especially in North America

More than half of sustainability experts surveyed claim there is a significant backlash against the sustainability agenda in their country (including ESG), with over eight in ten North American experts claiming this is the case. Experts in the NGO and academic sectors are more likely to believe there is a backlash than those working in the for-profit sectors.

QUESTION

How significant do you think the current backlash against the sustainability agenda (including ESG) is in your country?



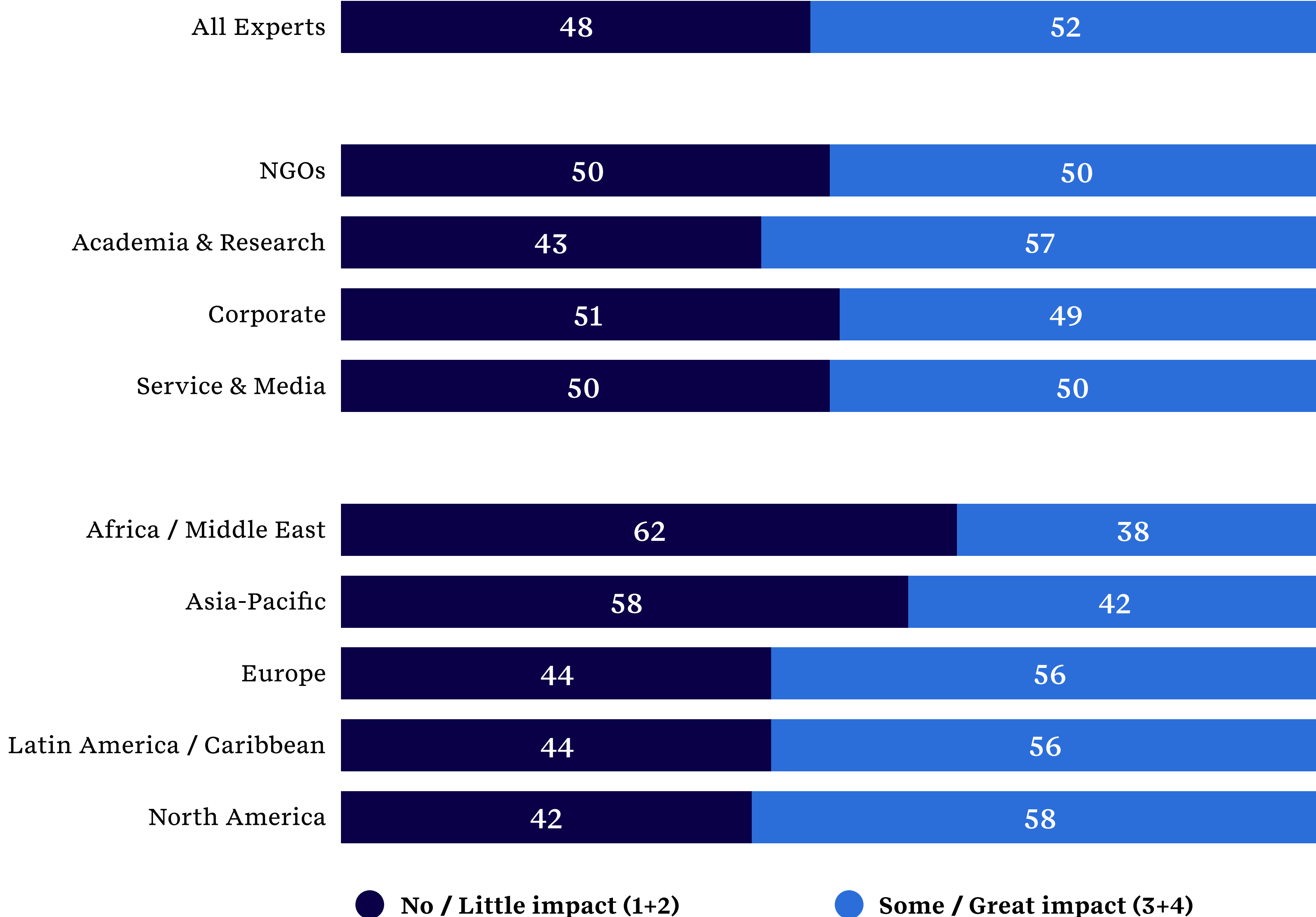
% of Experts, by Sector and Region, 2024

Experts are split on whether backlash will impact transition to sustainability

When asked how much, if at all, a backlash against the sustainability agenda will slow down the transition to sustainability in the next few years, experts are split on believing it will have any significant impact. Experts based in North America, Europe and Latin America and the Caribbean are much more likely than those based in Asia-Pacific or Africa and the Middle East to say that the impact will slow down the transition.

QUESTION

How much, if at all, do you think the backlash will slow down the transition to sustainability in the next few years?



% of Experts, by Sector and Region, 2024

Government leaders



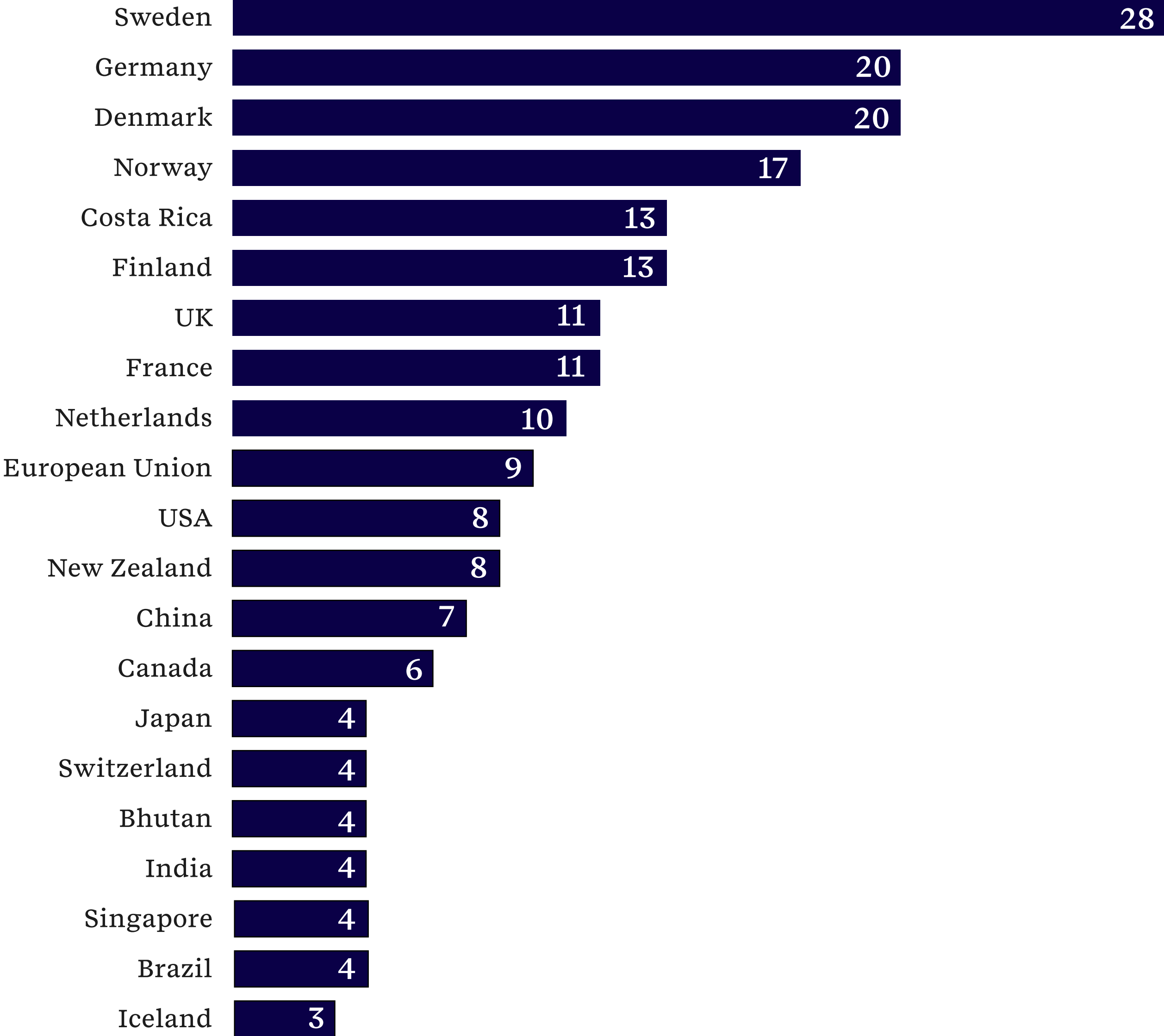
Sweden's national government is the most recognized for its sustainability leadership

Sweden, Germany, Denmark, and Norway are viewed as leading on sustainable development among governments, but experts also name countries outside of Europe and North America like Costa Rica, New Zealand, China, Japan, Bhutan, India, Singapore, and Brazil.

QUESTION

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

PLEASE ENTER A MAXIMUM OF 3 COUNTRIES IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2024

Sweden, Norway, and Finland are increasingly recognized for being leaders in advancing sustainable development

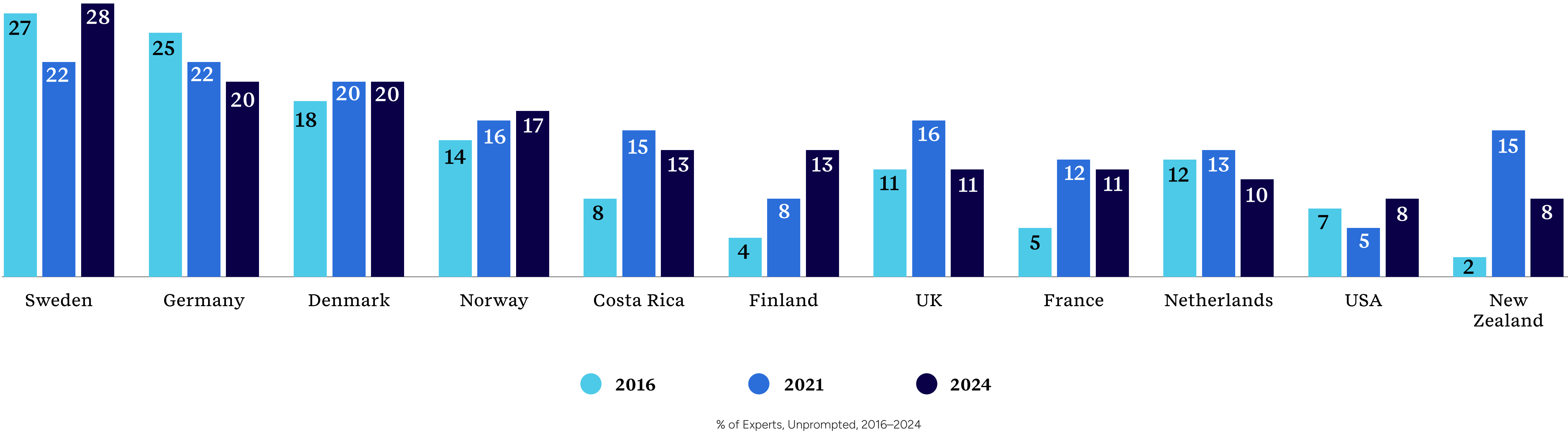
Experts are most likely to name the Swedish government as a leader in sustainable development and are more likely to do so compared to 2021. The Nordic countries and Germany dominate recognition for

sustainability leadership, with Norway and Finland also increasingly likely to be top-of-mind as a sustainability leader. In contrast, recognition for the sustainability efforts of UK and New Zealand have decreased.

QUESTION

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

PLEASE ENTER A MAXIMUM OF 3 COUNTRIES IN THE SPACES PROVIDED.



Northern European countries are recognized across sectors and regions, along with Costa Rica

Across all regions and sectors, Northern European countries are the most recognized leaders in advancing the sustainability agenda. However, Costa Rica stands out as a recognized leading government from Latin America, especially among NGOs.

QUESTION

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

PLEASE ENTER A MAXIMUM OF 3 COUNTRIES IN THE SPACES PROVIDED.

	Sector				Region				
	NGO	Academic & Research	Corporate	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Sweden	16%	35%	31%	24%	22%	26%	32%	28%	27%
Germany	18%	24%	21%	17%	12%	18%	16%	31%	22%
Denmark	18%	26%	20%	16%	15%	12%	26%	22%	20%
Norway	18%	22%	16%	17%	15%	11%	21%	17%	18%
Costa Rica	18%	15%	13%	13%	10%	7%	17%	17%	11%
Finland	6%	15%	12%	12%	15%	12%	16%	15%	8%
UK	6%	9%	15%	14%	22%	10%	7%	15%	12%
France	15%	9%	12%	12%	10%	11%	12%	13%	10%
Netherlands	3%	9%	14%	10%	2%	8%	9%	11%	14%
USA	10%	3%	11%	7%	22%	7%	2%	4%	14%
New Zealand	10%	10%	7%	7%	7%	8%	5%	14%	8%

% of Experts, by Sector and Region, Unprompted, 2024
 NOTE: Government sector was not included in this analysis due to small sample size.

NGO leaders



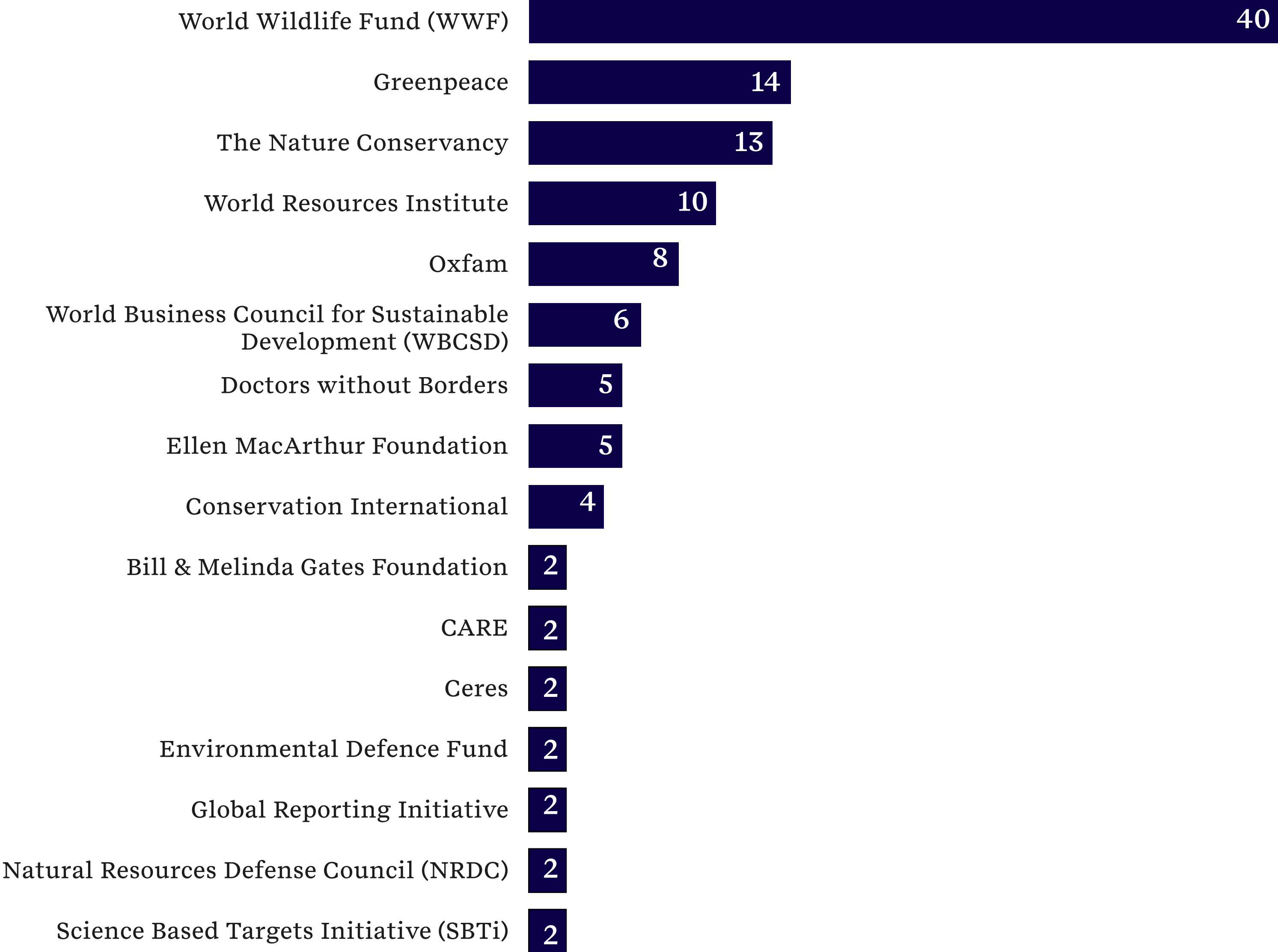
World Wildlife fund is the most recognized NGO for sustainability leadership among experts

World Wildlife Fund continues to stand out as a leading NGO, with four in ten experts surveyed naming it as a leader in advancing sustainable development. Greenpeace, The Nature Conservancy, and World Resources Institute are also seen as leading NGOs, cited by around one in ten experts each.

QUESTION

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

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2024

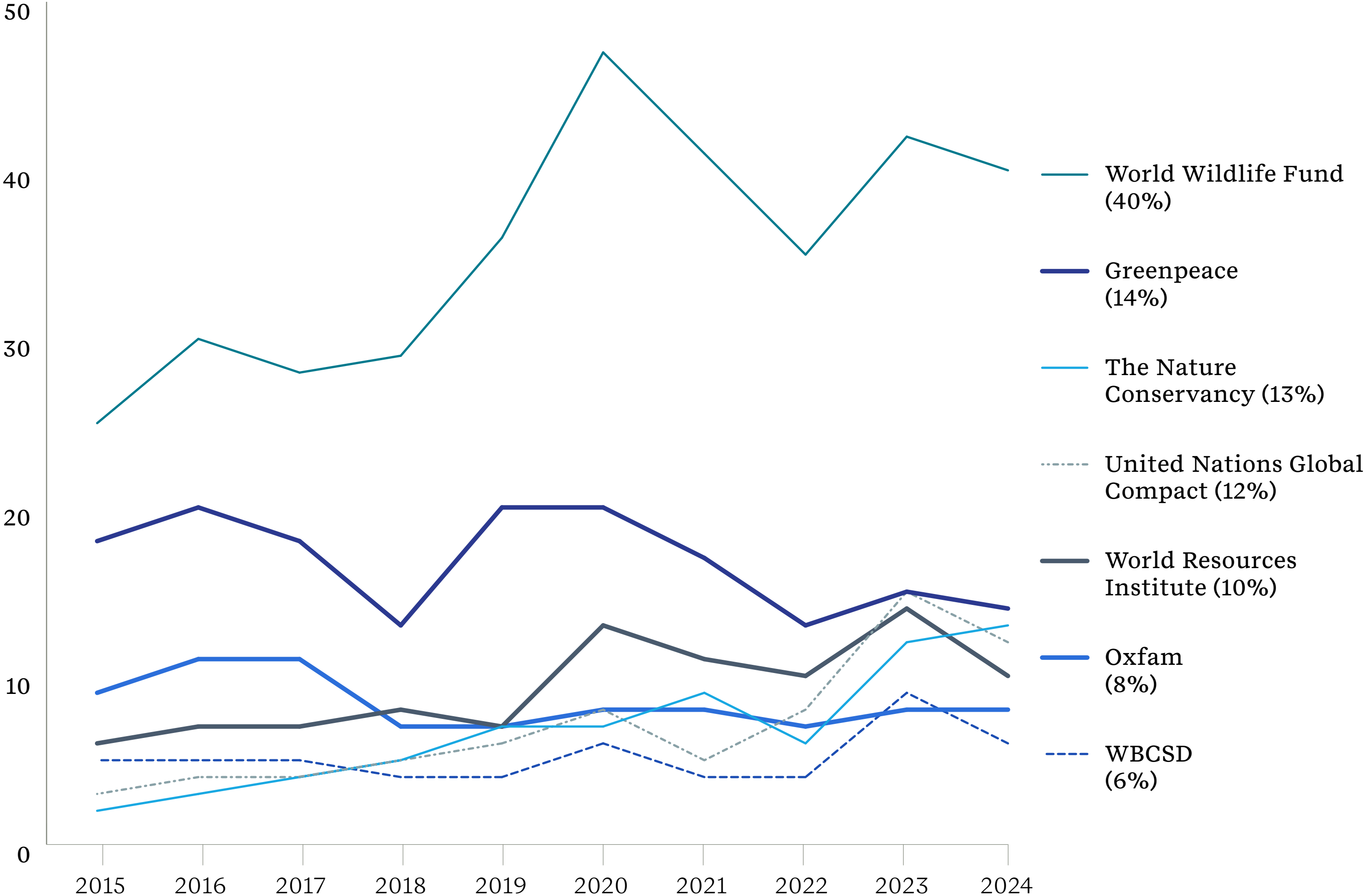
World Wildlife Fund has remained top of mind among experts over the past decade

World Wildlife Fund has remained the most recognized NGO among our panel of sustainability experts over the past decade, while Greenpeace has consistently remained the runner-up. The Nature Conservancy has advanced from fifth position in 2023 to third position this year.

QUESTION

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

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2015–2024

Experts in all sectors and regions recognize World Wildlife Fund as a sustainability leader

World Wildlife Fund is most recognized as a sustainability leader among experts in the for-profit sectors and among experts based in Europe and Latin America and the Caribbean, although it is the most-mentioned NGO among experts in all sectors and all regions.

QUESTION

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

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.

	Sector				Region				
	NGO	Academic & Research	Corporate	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
World Wildlife Fund	35%	29%	51%	40%	24%	37%	47%	46%	36%
Greenpeace	5%	18%	18%	15%	15%	9%	21%	19%	9%
The Nature Conservancy	16%	7%	18%	12%	2%	9%	4%	22%	23%
United Nations / Global Compact	3%	13%	13%	12%	17%	9%	11%	11%	14%
World Resources Institute	16%	9%	10%	10%	10%	13%	8%	8%	12%
Oxfam	6%	13%	7%	10%	7%	10%	11%	6%	7%
WBCSD	6%	1%	4%	11%	2%	7%	8%	7%	6%
Ellen McArthur Foundation	2%	3%	7%	5%	7%	1%	7%	4%	4%
Doctors Without Borders	3%	6%	6%	3%	2%	1%	9%	4%	4%
Conservation International	5%	3%	5%	3%	2%	3%	4%	7%	3%

% of Experts, by Sector and Region, Unprompted, 2024
 NOTE: Government sector was not included in this analysis due to small sample size.

Corporate leaders



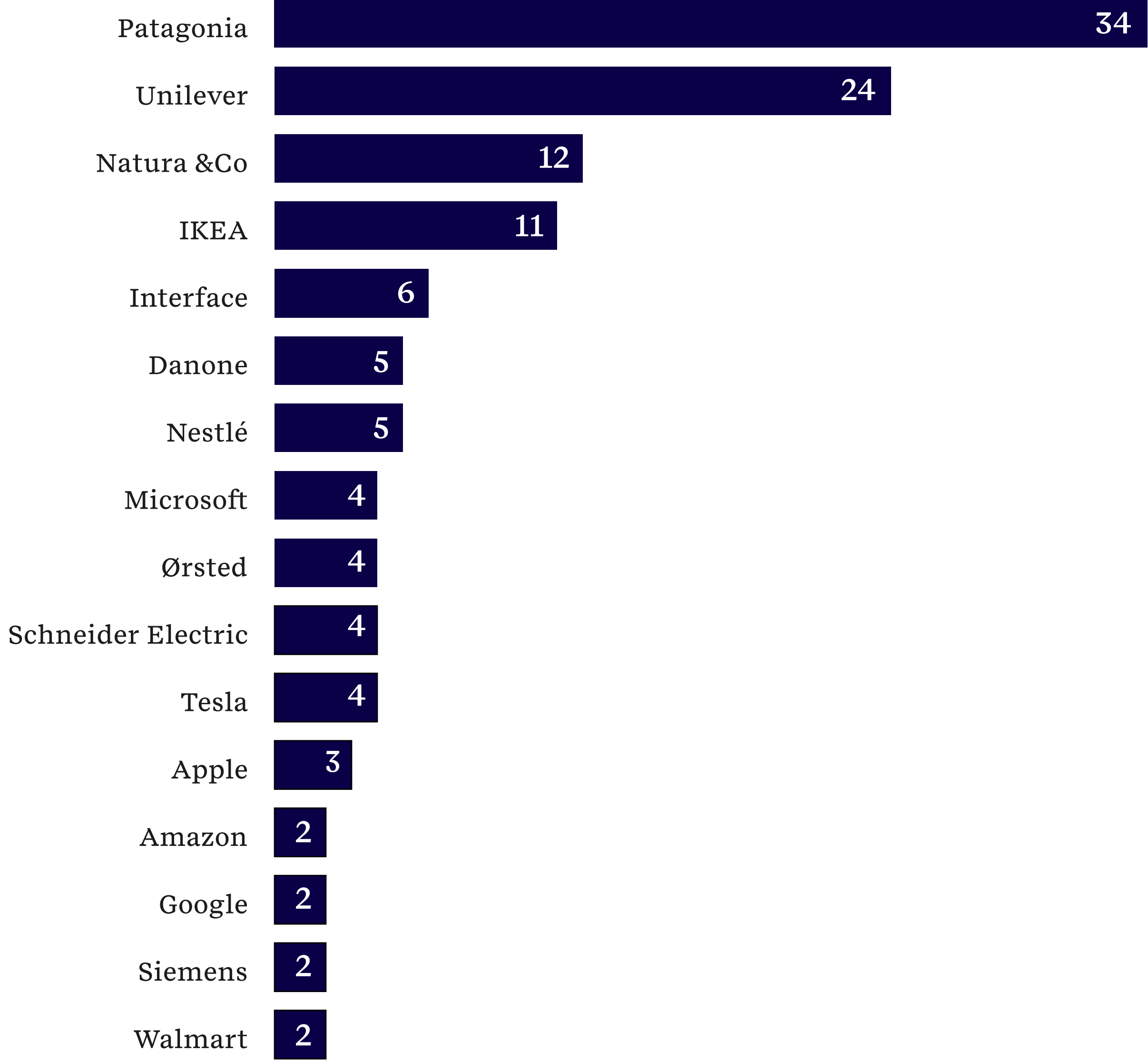
Patagonia is the most recognized company for its sustainability leadership, followed by Unilever, Natura &Co, and IKEA

As in 2023, Patagonia is cited by one-third of experts as a company that is a leader on sustainability. One-quarter of experts name runner-up Unilever, while just over one in ten spontaneously mention Natura &Co and IKEA. The top tier of most-recognized sustainability leaders is rounded out by Interface, Danone, Nestlé, Microsoft, Ørsted, Schneider Electric, Tesla, Apple, Amazon, Google, Siemens, and Walmart. Experts mentioned over 300 different companies as sustainability leaders, emphasizing the great diversity of leadership globally.

QUESTION

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

PLEASE ENTER A MAXIMUM OF THREE COMPANIES IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2024

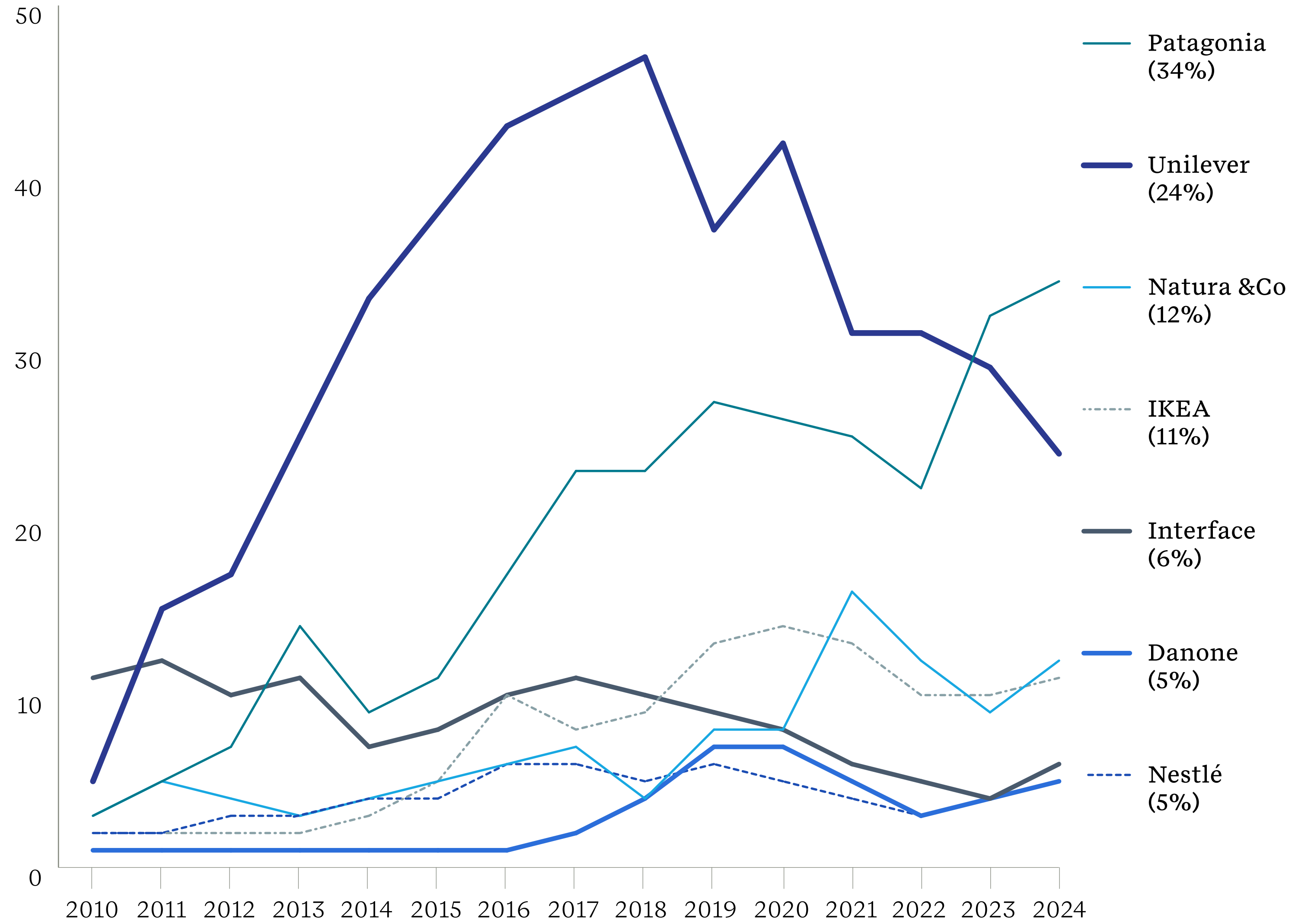
Patagonia receives the most recognition for sustainability leadership for the second year in row

Although Unilever dominated recognition by experts for more than a decade peaking in 2018, Patagonia has been the most recognized company for sustainability leadership for the past two years. Mentions of other companies in the top tier have remained relatively stable over the past few years.

QUESTION

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

PLEASE ENTER A MAXIMUM OF THREE COMPANIES IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2010–2024

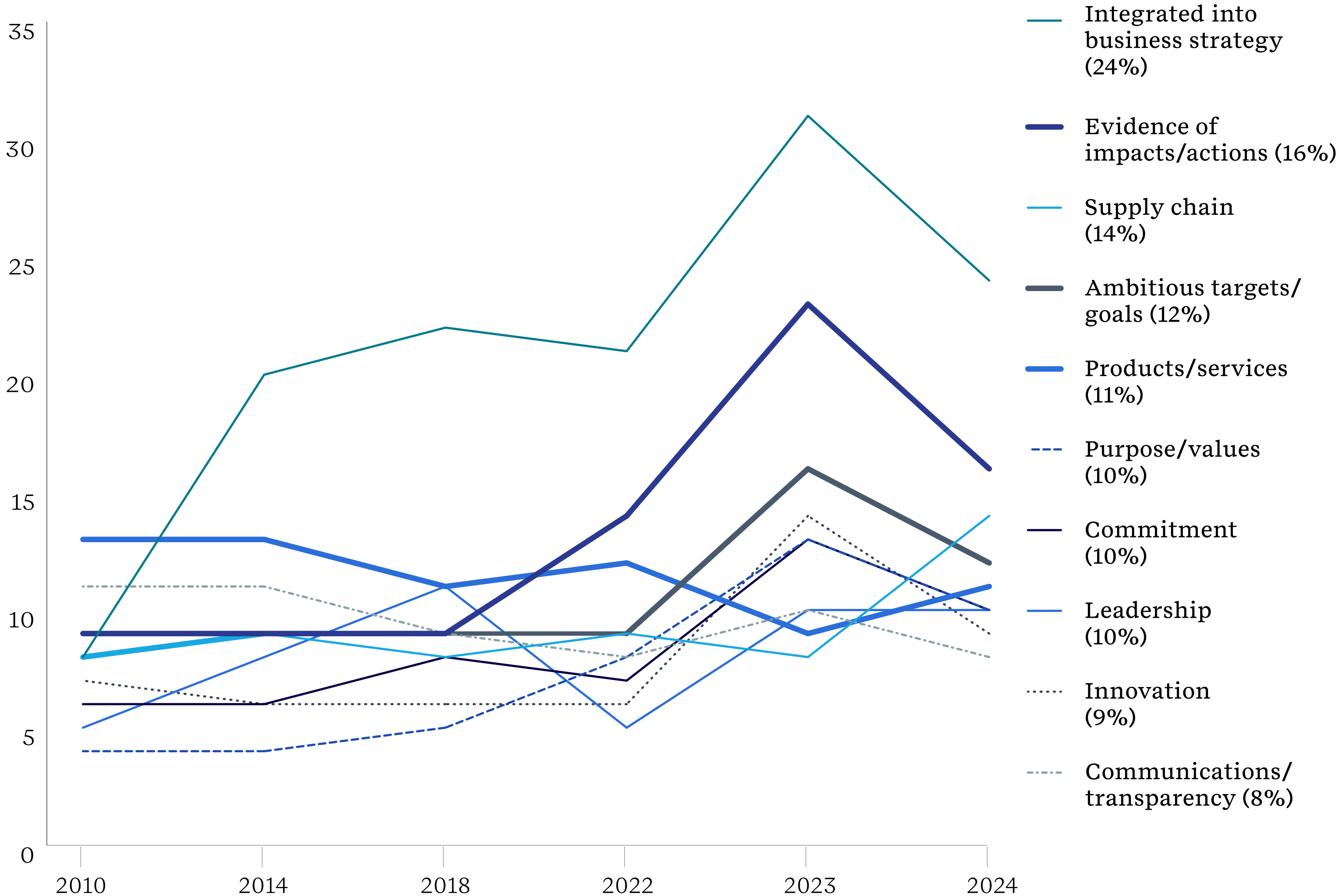
Recognized sustainability leadership continues to be driven by integration and impact while supply chain (scope 3) moves up on the agenda

Experts continue to emphasize the importance of sustainability integration and demonstrating real impacts and action as reasons a company is seen as a sustainability leader. However, experts are also increasingly recognizing the importance of focusing on the supply chain (scope 3) – it is the only driver of leadership with a significant increase in mentions this year.

QUESTION

Why do you think [INSERT COMPANY #1] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.



% of Experts, Unprompted, 2010–2024

Integration and impact drive recognized leadership across all sectors and regions

Integrating sustainability into business strategy, demonstrating impact, and focusing on the supply chain are consistent drivers of recognized leadership across all sectors and regions. Experts in Latin America are particularly likely to say integration is the reason for corporate sustainability leadership.

QUESTION

Why do you think [INSERT COMPANY #1] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.

	NGO	Academic & Research	Corporate	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Most important driver	Integrated into business strategy 19%	Integrated into business strategy 25%	Integrated into business strategy 25%	Integrated into business strategy 29%	Integrated into business strategy 15% each Innovation 15% each	Integrated into business strategy 21%	Integrated into business strategy 27%	Integrated into business strategy 35%	Integrated into business strategy 20%
2 nd most important driver	Supply chain 15%	Evidence of impact/ actions 16%	Evidence of impact/ actions 17%	Evidence of impact/ actions 18%	Supply chain Evidence of impact/ actions 12% each	Supply chain Products/ services 14% each	Evidence of impact/ actions 15%	Evidence of impact/ actions 24%	Evidence of impact/ actions 18%
3 rd most important driver	Evidence of impact/ actions 13%	Ambitious targets and goals 15%	Supply Chain Commitment 13% each	Supply Chain Purpose/ values 15% each	Ambitious targets and goals Communication and transparency 10% each	Ambitious targets and goals 11%	Supply chain 13%	Supply chain 18%	Commitment 15%

% of Experts, by Sector and Region, Unprompted, 2024
NOTE: Government sector was not included in this analysis due to small sample size.

Expert quotes

QUESTION

Why do you think [INSERT COMPANY] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.

“Using their business to be a platform to speak about climate change and responsible consumption.”

– Corporate, UK

“Being a leader and convenor of sustainability platforms such as RSPO and ASC. Engaging the entire supply/value chain including small-scale farmers for change.”

– NGO, Japan

“Its business model evolved and continues to in line with the sustainable development challenges and opportunities for the countries it operates in, e.g., fintech, digital education, m-health, etc.”

– Academia, Kenya

“They have reworked the carbon footprint of each good or service they market, and they are contributing substantial funds to sustainability initiatives.”

– Government, India

Regional corporate leadership



Patagonia, Unilever, Tata Group, and Natura &Co are regional sustainability leaders

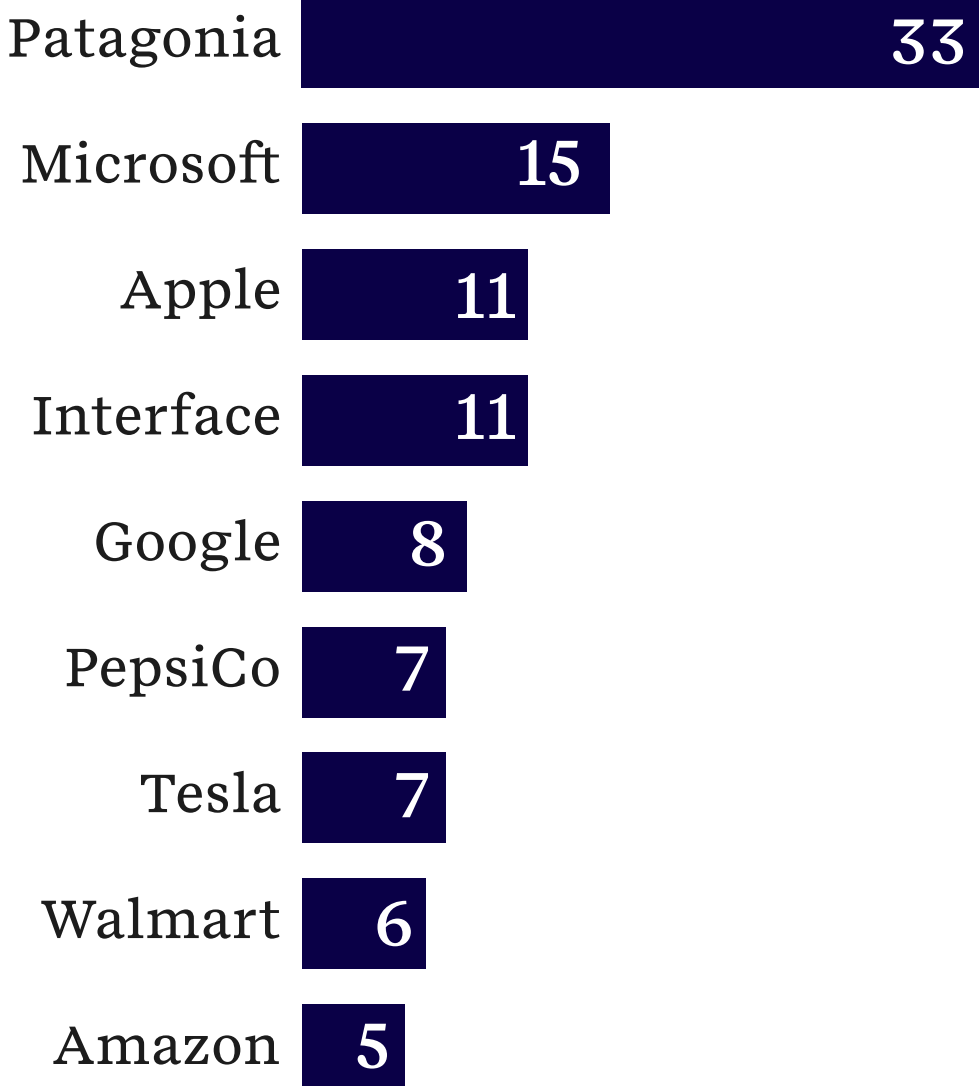
When experts are asked to identify sustainability leaders among companies headquartered in their regions, a large variety of companies are mentioned. Natura &Co dominates the sustainability space in Latin America, while Patagonia tends to be top-of-mind in North America and Unilever is the most recognized in Europe. Experts in Asia-Pacific are less likely to mention one specific leader, although Tata Group now holds the first-place ranking in this region.

QUESTION

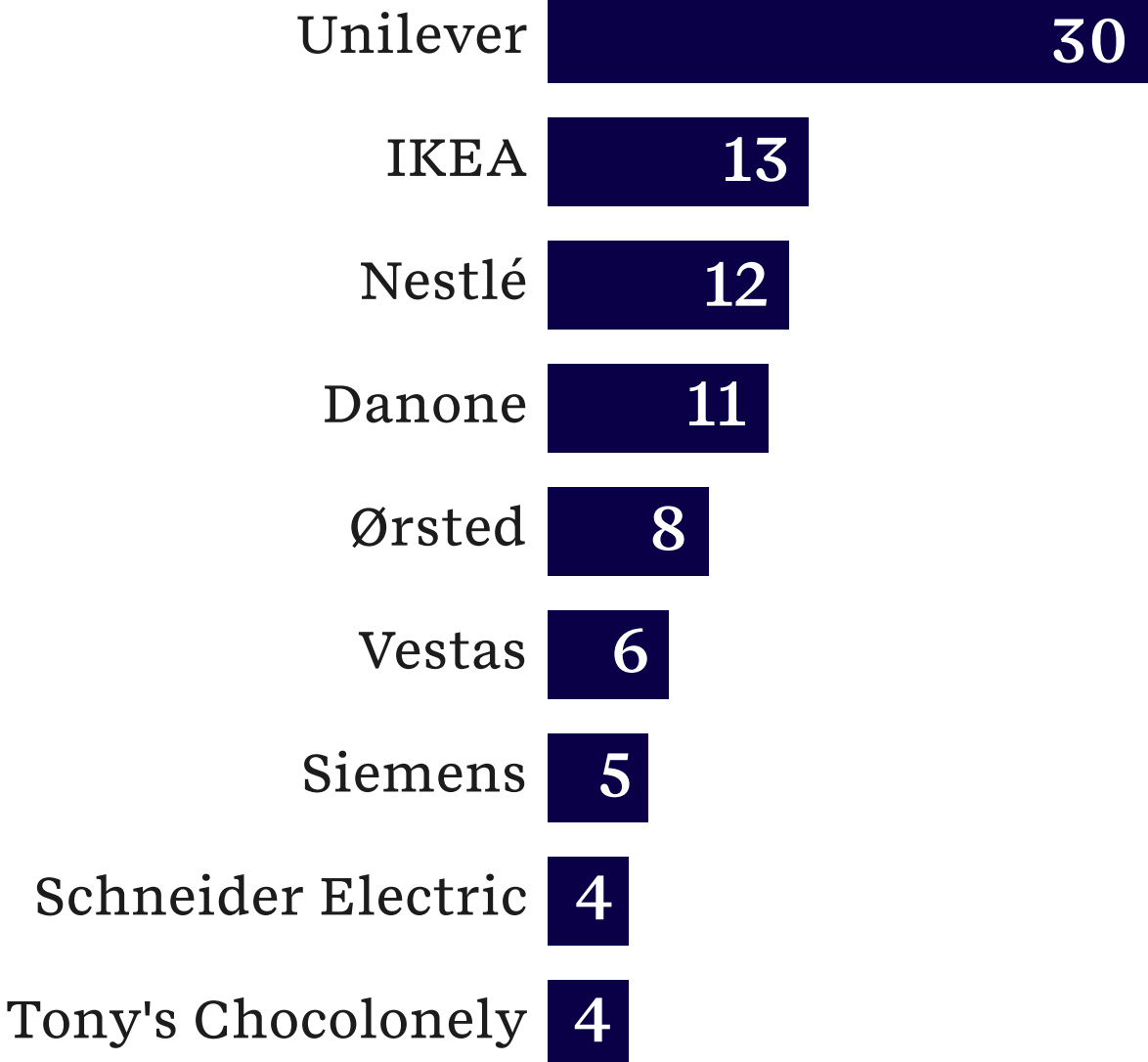
Which companies headquartered specifically in [region where respondent is based] do you think are leaders in integrating sustainability into their business strategy?

PLEASE ENTER UP TO THREE RESPONSES.

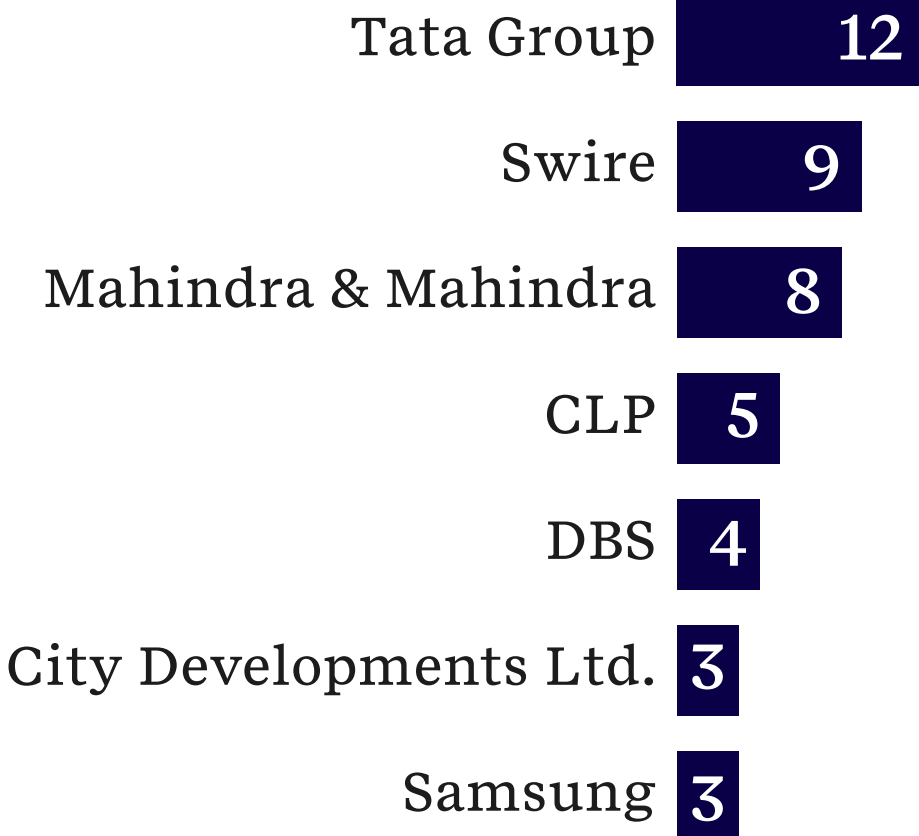
North America



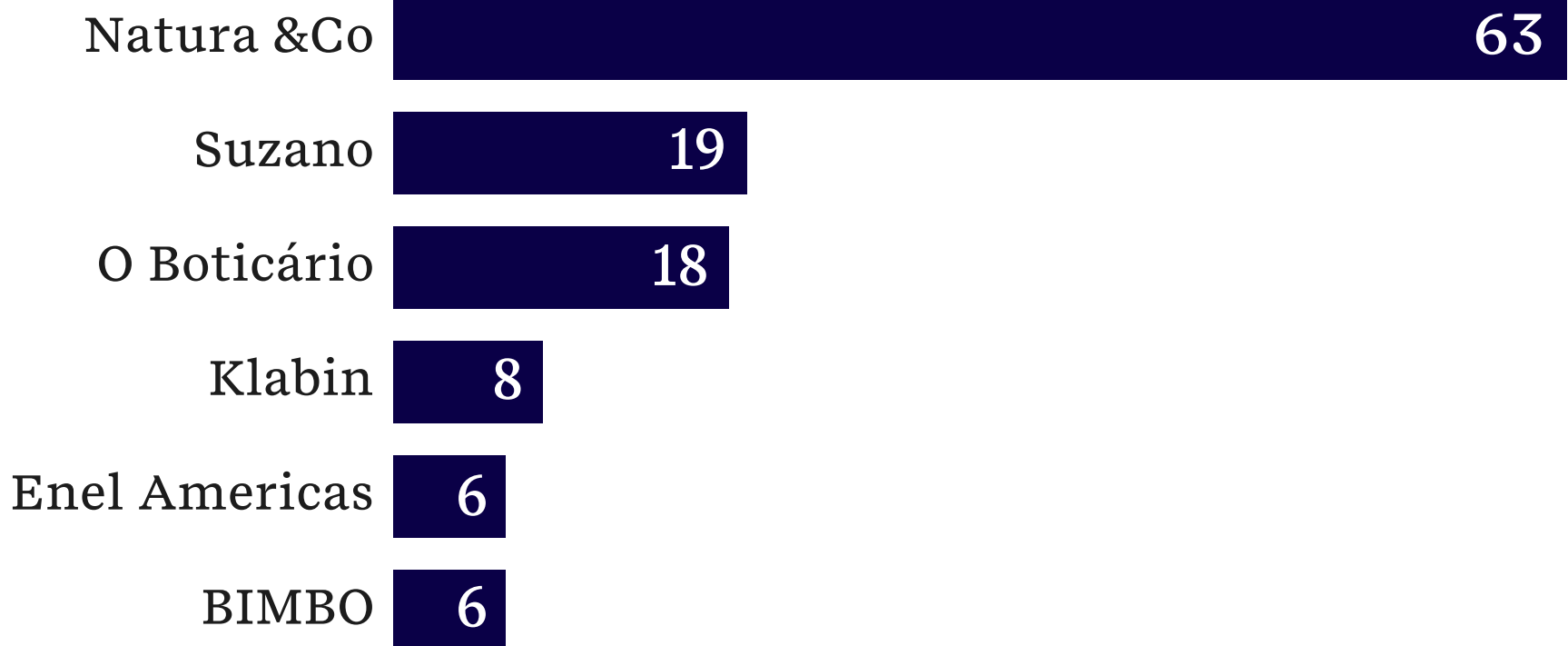
Europe



Asia-Pacific



Latin America



% of Experts in Each Region, Unprompted, 2024

NOTE: The Africa and Middle East Region was not included in this analysis due to small sample size.

Sector performance on sustainability



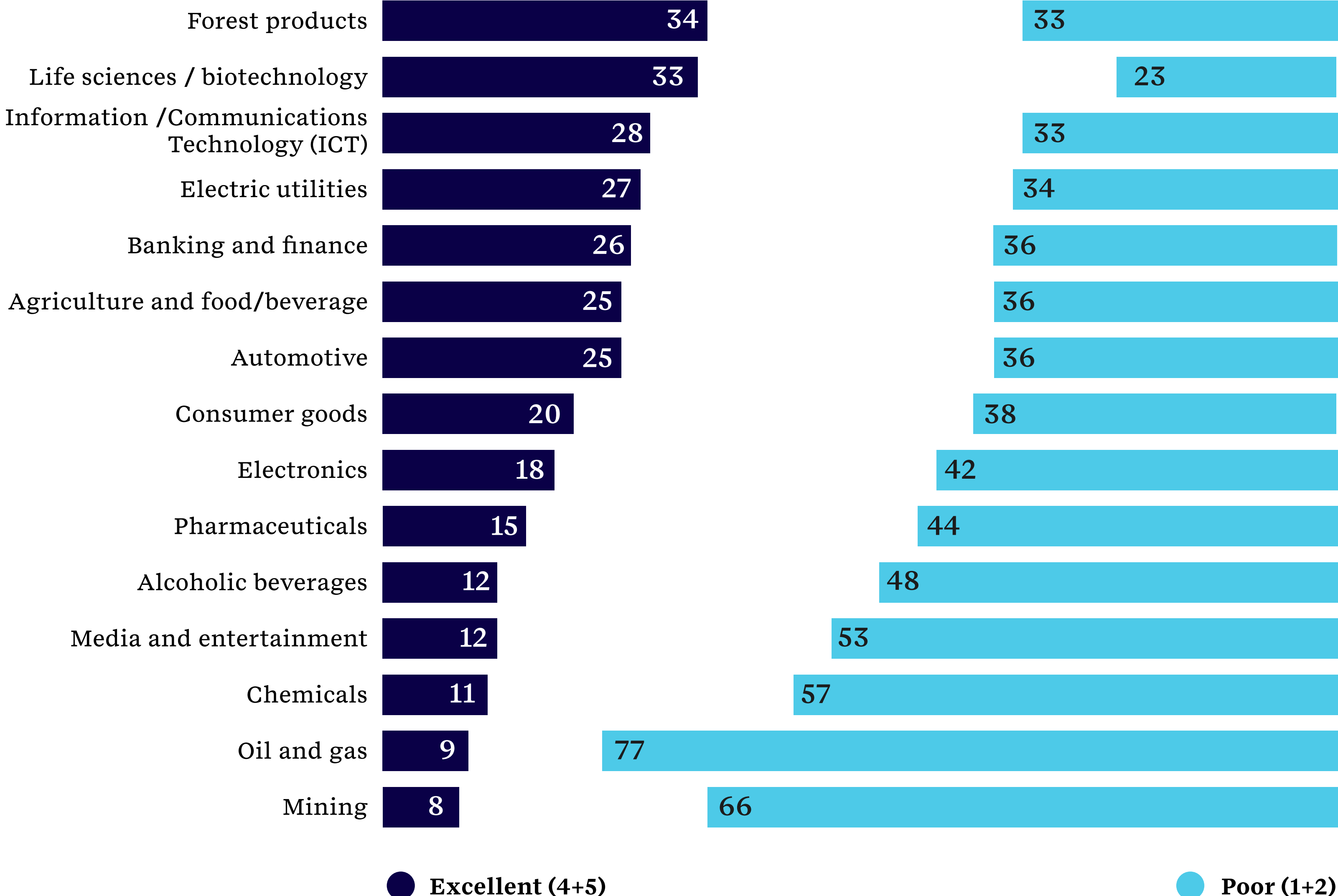
One-third of experts rate forest products and life sciences positively on managing transitioning to sustainability

The forest products and life sciences sectors are viewed most positively by experts on managing their transition to sustainable development. Other sectors, especially extractives, are more likely to be rated negatively than positively on sustainability transition.

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 A SCALE OF 1 TO 5 WHERE 1 MEANS "POOR" AND 5 MEANS "EXCELLENT."



% of Experts, 2024

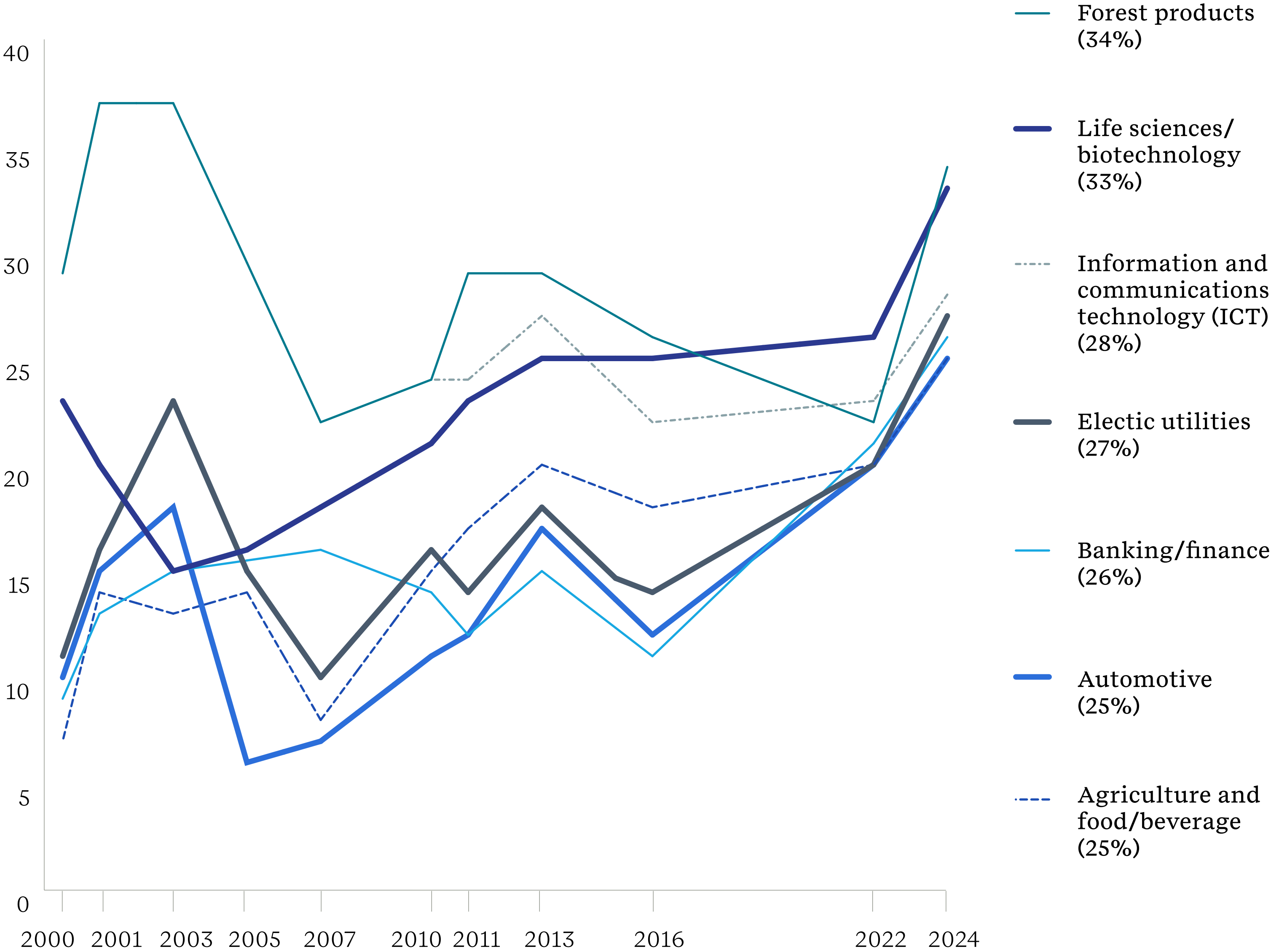
Experts' assessments of sectors' transitioning to sustainability have mostly improved

Experts' perceptions of how well sectors are managing their transition to sustainability have improved over the past few years for most of the sectors rated, especially for the banking/finance, electric utilities, automotive, and life sciences sectors which have seen the largest improvements in ratings over the past decade.

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 A SCALE OF 1 TO 5 WHERE 1 MEANS "POOR" AND 5 MEANS "EXCELLENT."



% of Experts, "Excellent" (4+5), Top Half of Sectors Rated, 2000–2024

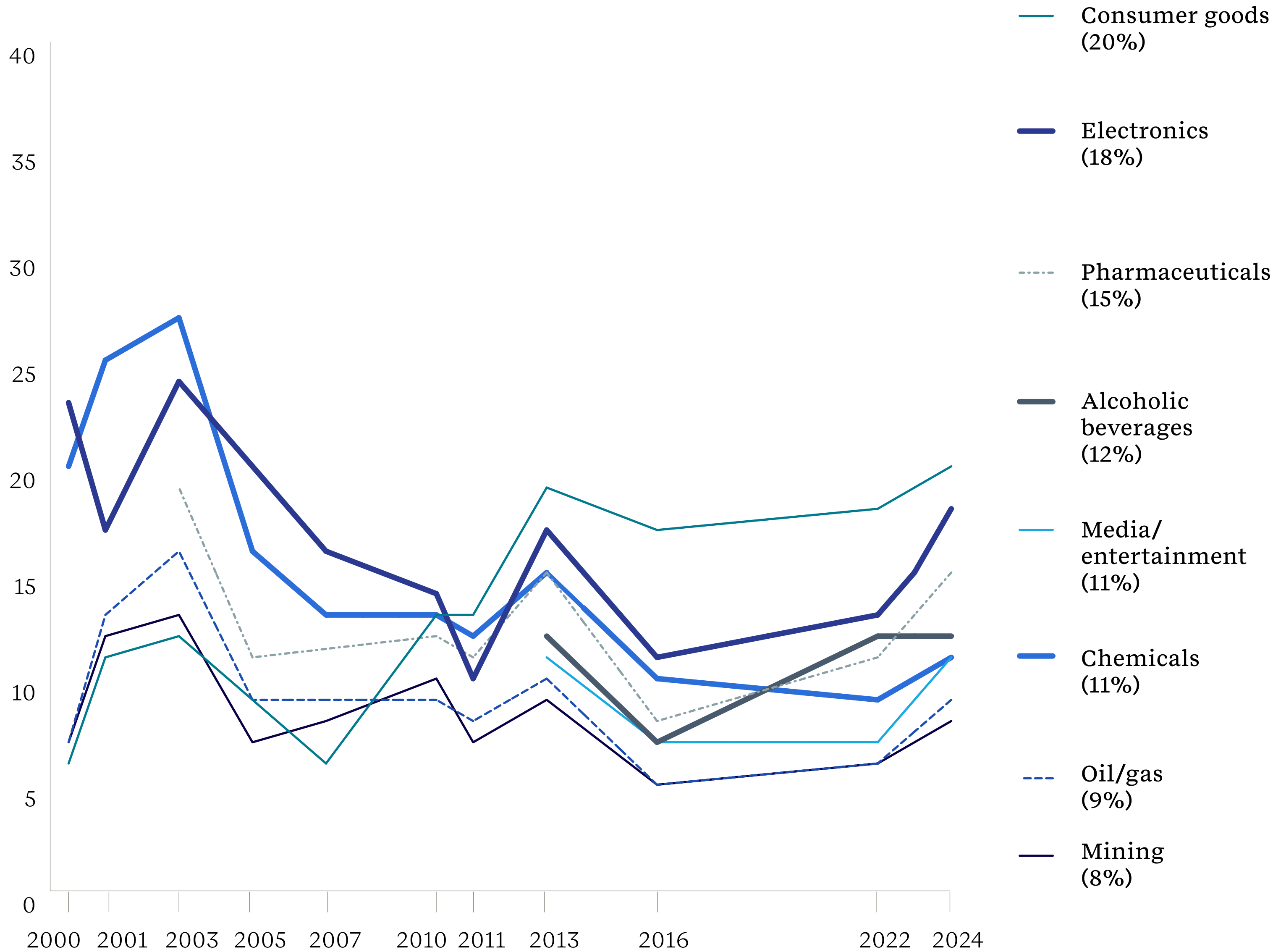
Extractives lag behind on perceived management of transition to sustainability

While other sectors are seen by experts to be improving, the chemicals and extractive sectors are now seen to be doing slightly worse or the same as they did a decade ago. The alcoholic beverages, media and entertainment, and chemicals sectors also lag on perceived sustainability performance, while consumer goods, electronics, and pharmaceuticals are seen to be doing slightly better.

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 A SCALE OF 1 TO 5 WHERE 1 MEANS "POOR" AND 5 MEANS "EXCELLENT."



% of Experts, "Excellent" (4+5), Bottom Half of Sectors Rated, 2000–2024

Sectors seen as best managing transition to sustainability vary by sector and region

Experts in Asia-Pacific and North America highlight ICT as the most positively viewed sector, while more than half of Latin American experts say that the forest products industry is managing its transition to sustainable development well. Experts based in Africa and the Middle East instead point to banking/finance as the sector leading on sustainability.

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 A SCALE OF 1 TO 5 WHERE 1 MEANS "POOR" AND 5 MEANS "EXCELLENT."

	NGO	Academic & Research	Corporate	Service & Media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Most positively viewed sector	Electric utilities 31%	Life sciences/ bio-technology 41%	Forest products 43%	Life sciences/ bio-technology 34%	Banking and finance 36%	Information and communications technology (ICT) 48%	Life sciences/ bio-technology 42%	Forest products 55%	Information and communications technology (ICT) 32%
2nd most positively viewed sector	Agriculture and food/ beverage 28%	Agriculture and food/ beverage 33%	Banking and finance 32%	Forest products 33%	Information and communications technology (ICT) 33%	Automotive 34%	Forest products 41%	Life sciences/ bio-technology 48%	Forest products 30%
3rd most positively viewed sector	Life sciences/ bio-technology 27%	Banking and finance 28%	Information and communications technology (ICT) 31%	Electric utilities 28%	Life sciences/ bio-technology 29%	Electronics 33%	Agriculture and food/ beverage 30% each Electric utilities	Banking and finance 43%	Electric utilities 26%

% of Experts, "Excellent" (4+5), by Sector and Region, 2024
 NOTE: Government sector was not included in this analysis due to small sample size.



Chris Coulter
CEO
chris.coulter@globescan.com

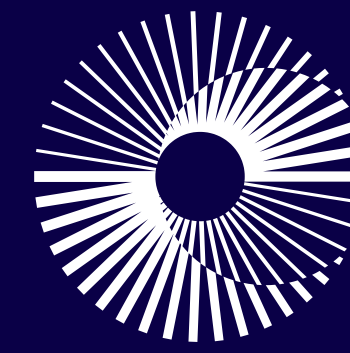


Tove Malmqvist
Senior Manager
tove.malmqvist@globescan.com



Nina Xavier da Costa
Associate
nina.dacosta@globescan.com

LinkedIn: [linkedin.com/company/globescan](https://www.linkedin.com/company/globescan)
Email: insight@globescan.com
Website: globescan.com



Mark Lee
Global Director, Thought Leadership
mark.lee@erm.com



Dia Rizakos
Research & Networks Manager
dia.rizakos@erm.com



Justin Nelson
Research & Networks Manager
justin.nelson@erm.com

LinkedIn: [linkedin.com/company/sustainabilityinstituteerm](https://www.linkedin.com/company/sustainabilityinstituteerm)
Email: Institute@erm.com
Website: sustainability.com