

GlobeScan-SustainAbility Survey

Sustainability Leaders

2022



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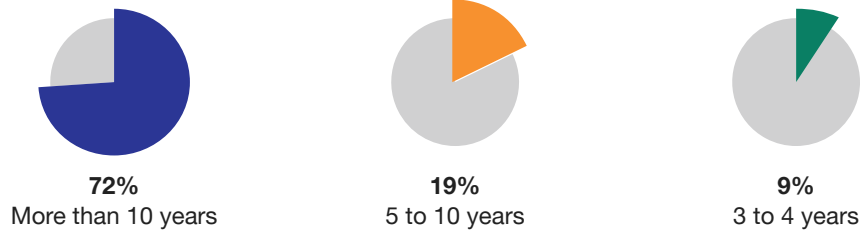


Survey Methodology

A total of 718 qualified sustainability experts completed the online questionnaire from March 14 to May 1, 2022. For the first time, the survey was offered to respondents in Arabic. The survey was also offered in Chinese, French, Portuguese, and Spanish, in addition to English.

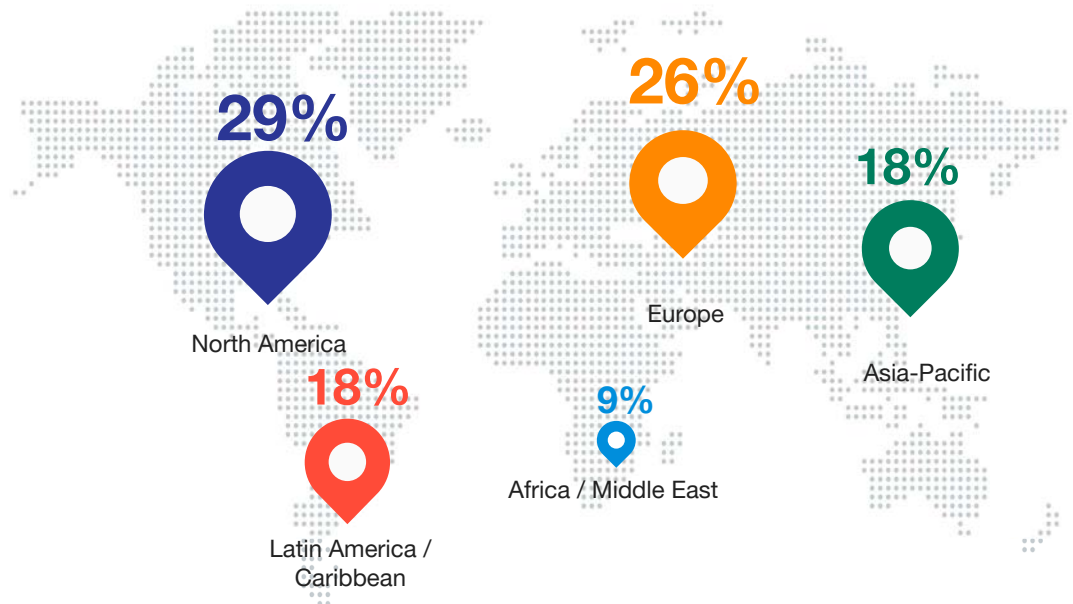
Experience

Respondents have the following experience working on sustainability issues:



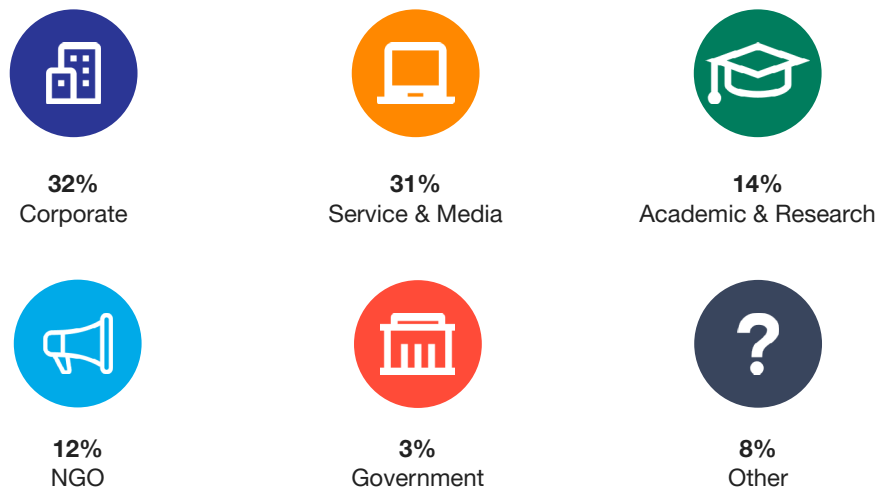
Geography

Experts surveyed span 73 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Introduction

Just as the pandemic begins to feel more under control, a new disruption hit the world in 2022. The war in Ukraine has been another reminder of the volatile and uncertain world we live in. While showcasing the world's ability to come together and support each other in times of need, it also reinforced the importance of resilient supply chains, as well as raising questions around energy transition, food security, and the effects of shifting political orders.

Our 2022 survey was completed between March 14 and May 1 by more than 700 sustainability experts from over 70 countries. The 2022 survey allows us to gauge which organizations sustainability experts perceive to be the leading NGOs and companies. This year we also revisited survey respondents' perceptions of different industries' performance in the transition to a sustainable future, comparing their responses to perspectives gathered when this was last asked back in 2016.

The corporate leaders remain relatively consistent compared to last year, with Unilever and Patagonia maintaining the top positions. Notably, Microsoft made the top five for the first time. Like last year, delving into regional leadership provides a more diverse list of company names. Reflecting the same pattern as in recent years, World Wildlife Fund tops the NGO leader list again in 2022, followed by Greenpeace. World Resources Institute maintains its position in third place.

When asked what characteristics leading companies and NGOs demonstrate, a common theme emerges. Respondents increasingly recognize institutional actors, including both corporations and NGOs, for their actions and not just for their words and aspirations. Survey respondents less frequently mention ambitious targets and commitments, impressive ambitions, or high-profile executive leadership as drivers of recognized sustainability leadership. Companies are mostly considered leaders for putting sustainability at the core of their business

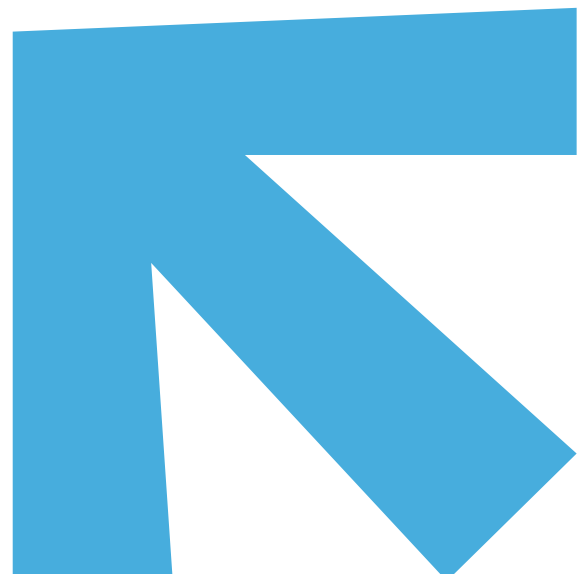
models and strategies as well as increasingly for demonstrating real results. Similarly for NGOs, experts cite collaboration and stakeholder engagement as the main reasons that the NGOs on our list are named as leaders.

Given the ongoing war in Ukraine at the time of fielding this survey, we asked experts what they believe will be the most likely short- and long-term impacts of the war on the sustainability agenda. Although many experts believe that focus might shift away from sustainability in the short term, many also believe that the war will encourage the transition to renewable energy in the long term.

Key Findings



- ▶ **Climate change continues to rise in urgency.** The perceived urgency of climate change has increased compared to last year, with sustainability experts now almost unanimously saying climate change is urgent. Energy security is also growing in perceived urgency in the context of the war in Ukraine and subsequent embargoes. Most other issues have decreased in perceived urgency relative to last year.
- ▶ **Collaboration and innovation are the main characteristics perceived to be driving NGO leadership in sustainable development.** Experts continue to view stakeholder engagement as the main driver for NGO leadership. Innovation and knowledge, as well as the reach and scale of initiatives, are also observed by experts to be consistent indicators of NGO leadership in sustainability over time.
- ▶ **National governments, the private sector, and multi-sectoral partnerships are still expected to lead the sustainable development agenda.** These three institutional groups are overwhelmingly expected to demonstrate leadership on sustainable development, with the same top three being mentioned as when this question was last asked in 2016.
- ▶ **World Wildlife Fund continues to dominate in recognition for sustainability leadership among NGOs.** Sustainability experts overwhelmingly recognize the World Wildlife Fund as an NGO leader in sustainable development, followed by Greenpeace and the World Resources Institute. WWF's lead is particularly evident among sustainability professionals in the service / media and corporate sectors and those based in Europe.



Key Findings (continued)



- ▶ **Unilever and Patagonia continue to top the list of sustainability leaders, while Microsoft makes the top five for the first time.** The top 11 (each named by at least 3 percent of expert respondents) is similar to that of 2021, including Unilever, Patagonia, Natura &Co, IKEA, Microsoft, Interface, Ørsted, Tesla, Danone, Google, and Nestlé. Rounding out the list of most-recognized companies, Apple, Marks & Spencer, Nestlé, Schneider Electric, Suzano, and Tata were each acknowledged for their sustainability leadership by 2 percent of experts surveyed.
- ▶ **Recognized leadership is increasingly driven by action and impact.** Continuing the trend seen in the past few years, expert respondents are less focused on ambitious targets and commitments, impressive ambitions, or high-profile executive leadership. Instead, companies are considered to be leaders when they put sustainability at the core of their business models and strategies and focus on tangible impact.
- ▶ **There is greater diversity among the companies cited as regional corporate sustainability leaders.** While the list of globally recognized sustainability leaders is relatively static year over year, different names emerge when experts are asked to identify sustainability leaders among companies headquartered in their own regions. Experts in Africa / Middle East highlight Nedbank, Safaricom, and Woolworths, while those in Asia-Pacific point to Tata. Europe is dominated by Unilever and IKEA, while experts in Latin America / Caribbean most mention Natura &Co, and North American experts favor Patagonia and Microsoft.
- ▶ **Almost all sectors are viewed by experts as performing poorly on transitioning to sustainability.** Technology- and science-based sectors are viewed most positively on managing their transition to sustainable development within the respective experts' region or country. All other sectors are much more likely to be rated negatively than positively on sustainability transition, especially the extractive sectors. Banking / finance, electric utilities, and automotive companies are seen to be transitioning to sustainability better than they were six years ago when this question was last asked.
- ▶ **Experts believe the war in Ukraine is distracting from sustainability issues in the short term but will lead to increased uptake of renewables in the long term.** In addition to being a distraction from sustainability and leading to increased use of fossil fuels, experts view food insecurity and higher prices as prominent short-term impacts of the war in Ukraine. While relatively few experts believe the war is helping to shift the focus to renewable energy in the short term, this is seen as the main likely long-term effect on the sustainability agenda.

Urgency of Sustainable Development Challenges



Growing Urgency of Climate Change Dominates Sustainability Challenges

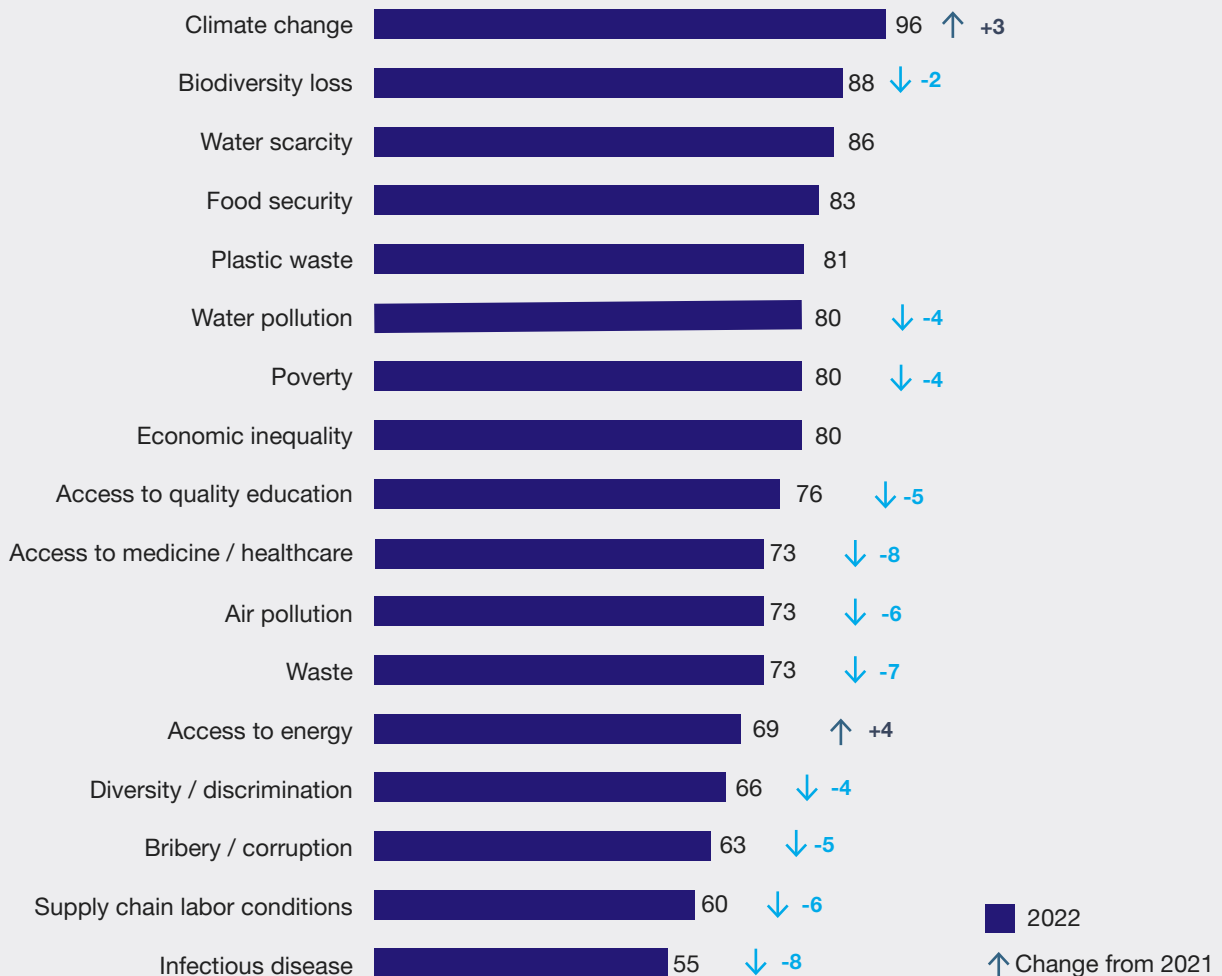
The perceived urgency of climate change has increased compared to last year. Sustainability experts now almost unanimously say climate change is urgent. Energy security is also growing in perceived urgency in the context of the war in Ukraine and subsequent embargoes. Most other issues and especially social issues such as access to medicines, poverty, and access to education, have decreased in perceived urgency.

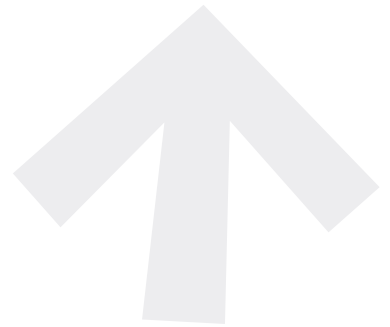
Q

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), 2021–2022





Urgency of Climate Change Trends Upward

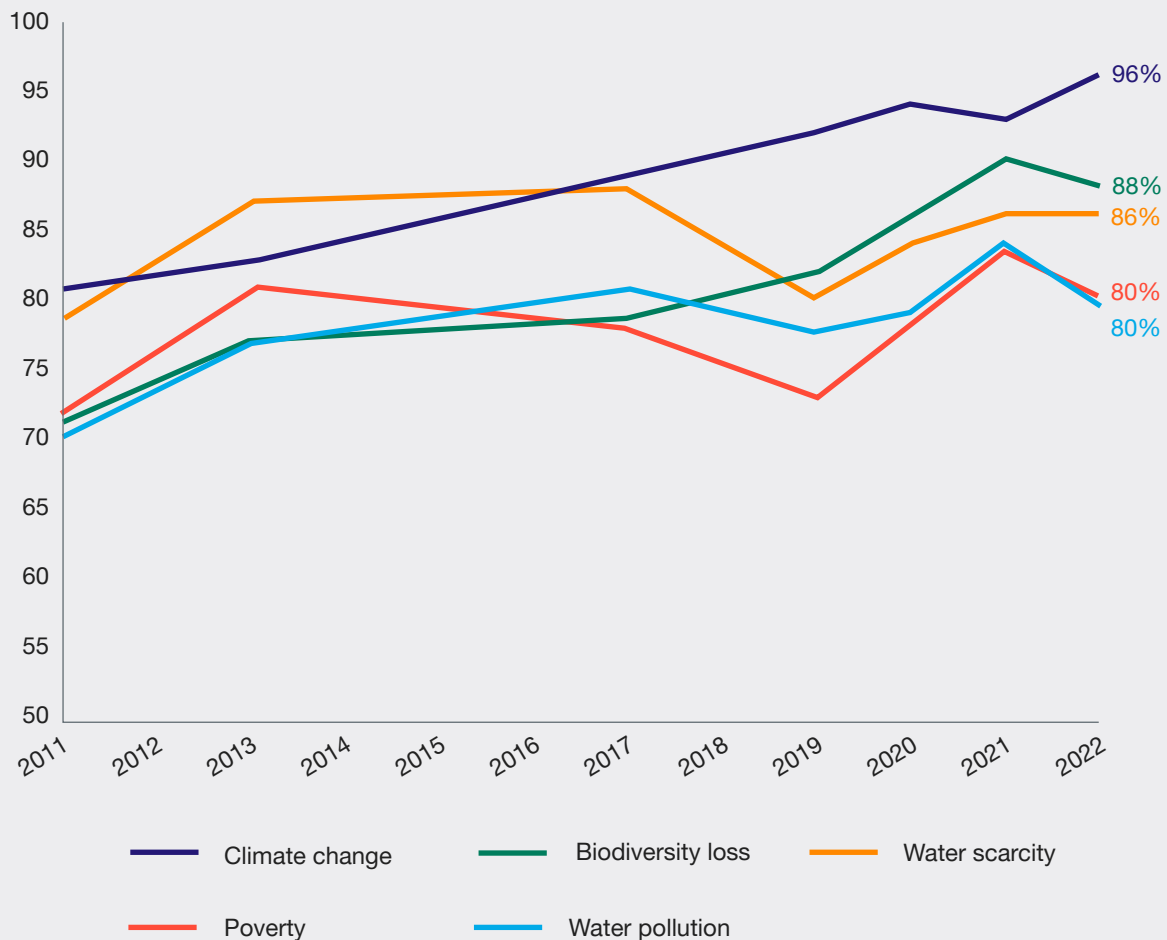
The perceived urgency of the top five challenges has increased over the past decade. This year climate change has increased in perceived urgency while others trend downwards with the exception of water scarcity.

Q

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), 2011–2022



Institutions Expected to Lead on Sustainable Development



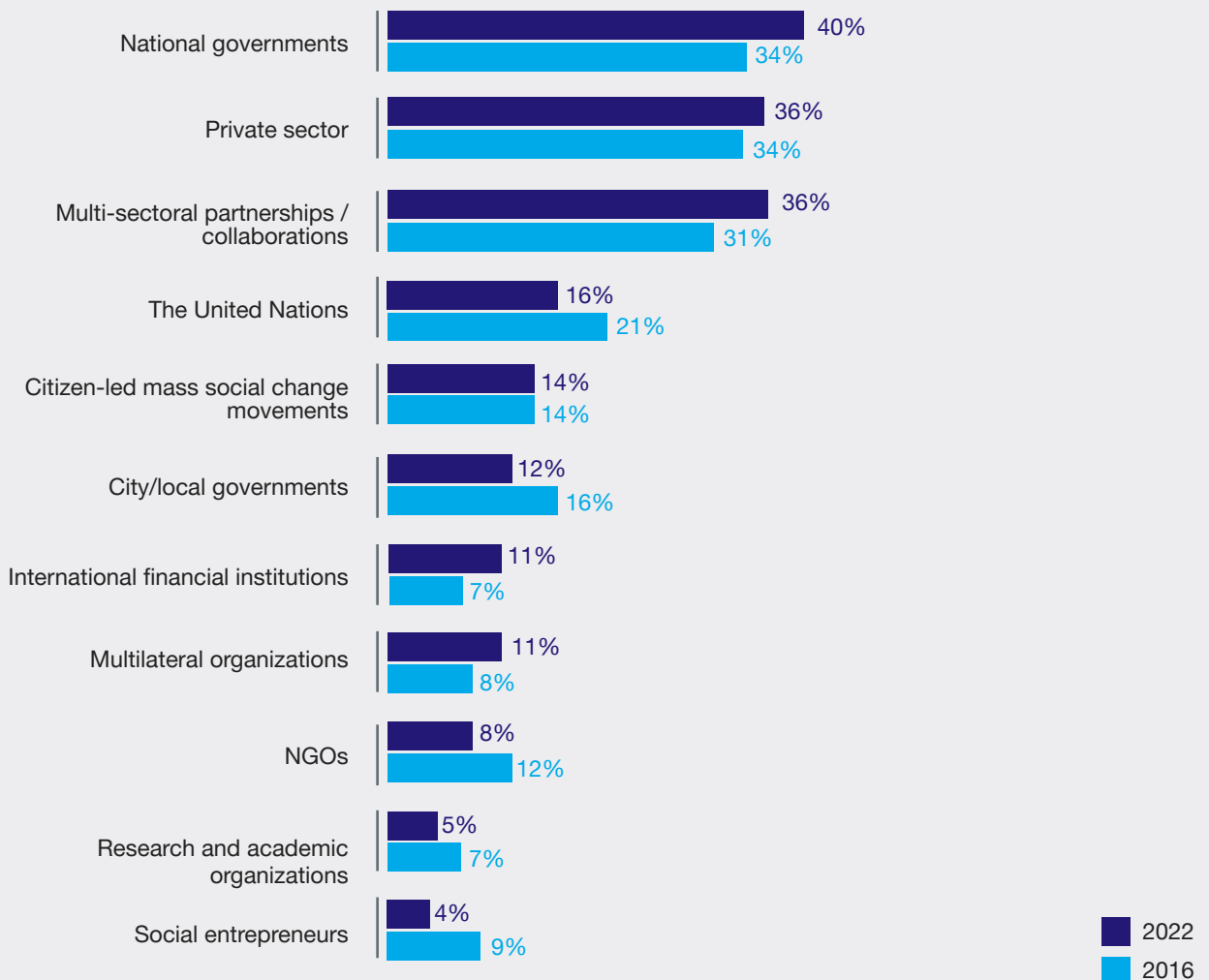
National Governments, the Private Sector, and Multi-sectoral Partnerships Are Expected to Lead the Sustainable Development Agendas

National governments, the private sector, and multi-sectoral partnerships are most expected to demonstrate leadership on sustainable development, with expectations increasing since 2016. Experts have become less prone to expect leadership from the United Nations, city governments, and NGOs.



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

% of Experts, 2016–2022



NGO Leaders





World Wildlife Fund Dominates Recognition for Leadership

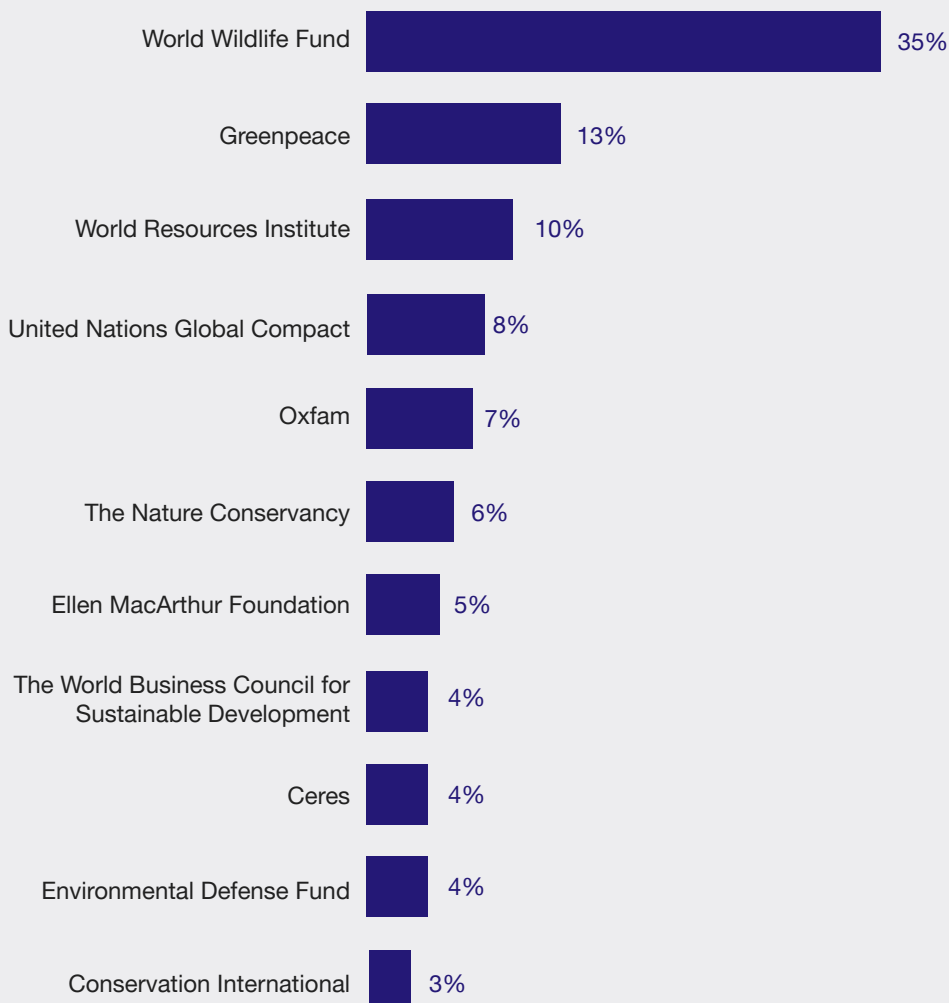
Sustainability experts overwhelmingly recognize the World Wildlife Fund as an NGO leader in sustainable development, followed by Greenpeace and the World Resources Institute.



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, Total Mentions, 2022



World Wildlife Fund and Greenpeace Maintain Their Leading Positions



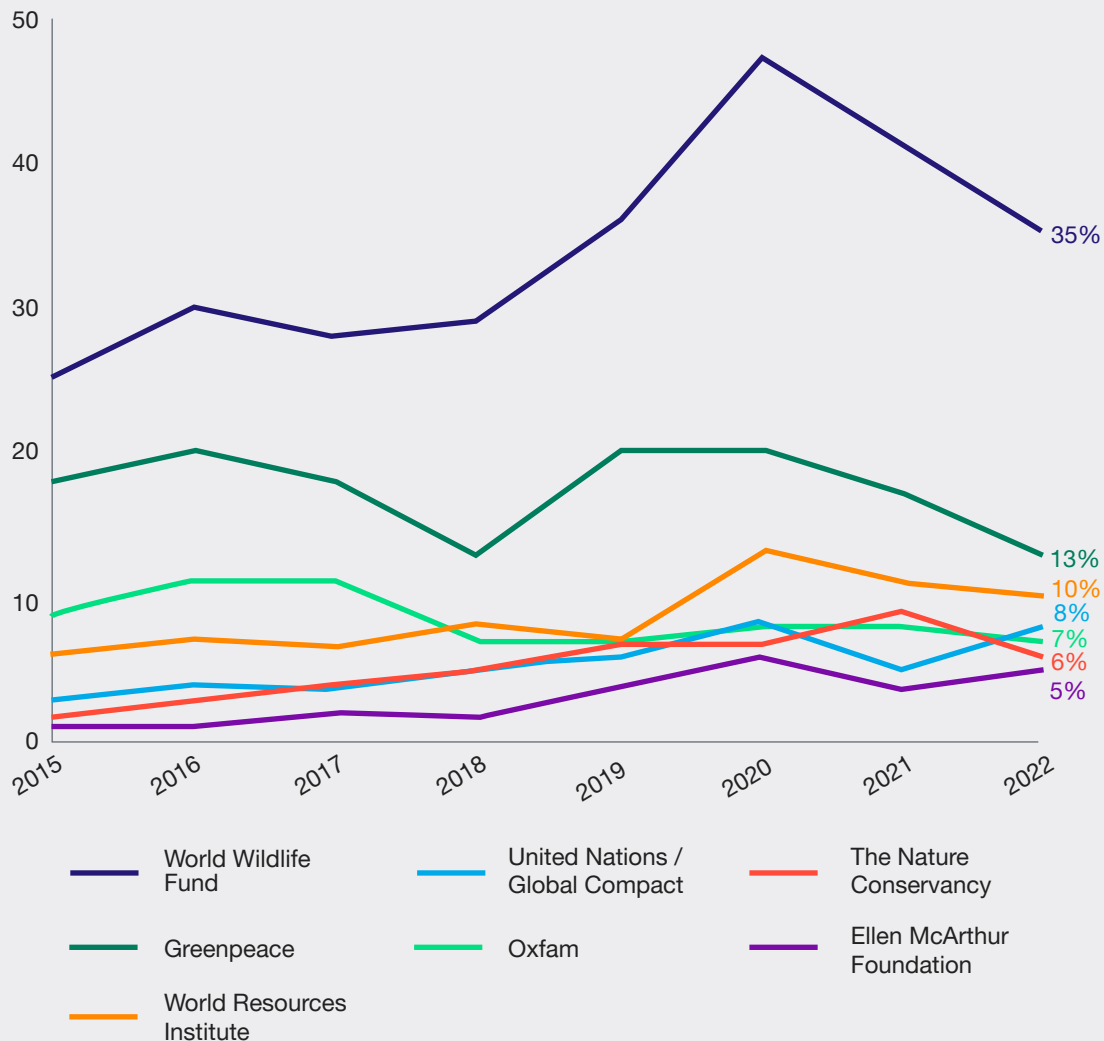
The group of most-recognized NGOs has remained relatively consistent since 2015. World Wildlife Fund and Greenpeace continue to retain the top two spots, although the former receives far more recognition by experts than any other organization. World Resources Institute has now retained third place for the past three years.



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, Total Mentions, 2015–2022



Perceptions of NGO Leadership Vary Widely by Sector and Region

Although World Wildlife Fund is consistently recognized as the leading NGO by experts in all sectors and from all parts of the world, its lead is particularly evident among sustainability professionals in the corporate and service / media sectors and respondents based in Europe.



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, by Sector and Region, Unprompted, Total Mentions, 2022

	NGO	Academic / Research	Corporate	Service / Media	Africa / Middle East	Asia-Pacific	Europe	Latin America/ Caribbean	North America
World Wildlife Fund	25%	32%	43%	37%	27%	24%	42%	38%	37%
Greenpeace	14%	14%	11%	13%	9%	12%	21%	13%	8%
World Resources Institute	10%	7%	14%	9%	6%	6%	7%	11%	15%
United Nations / Global Compact	8%	8%	6%	10%	14%	6%	8%	8%	8%
Oxfam	7%	5%	6%	10%	5%	5%	14%	4%	4%
The Nature Conservancy	7%	5%	9%	6%	5%	1%	2%	9%	12%
Ellen McArthur Foundation	4%	3%	7%	6%	0%	4%	7%	3%	5%
WBCSD	0%	3%	6%	5%	0%	3%	6%	3%	6%
Ceres	4%	6%	5%	4%	2%	2%	2%	0%	11%
Environmental Defense Fund	1%	4%	7%	3%	2%	0%	3%	1%	10%
Conservation International	0%	3%	6%	3%	5%	2%	1%	5%	5%

Government sector was not included in this analysis due to small sample size

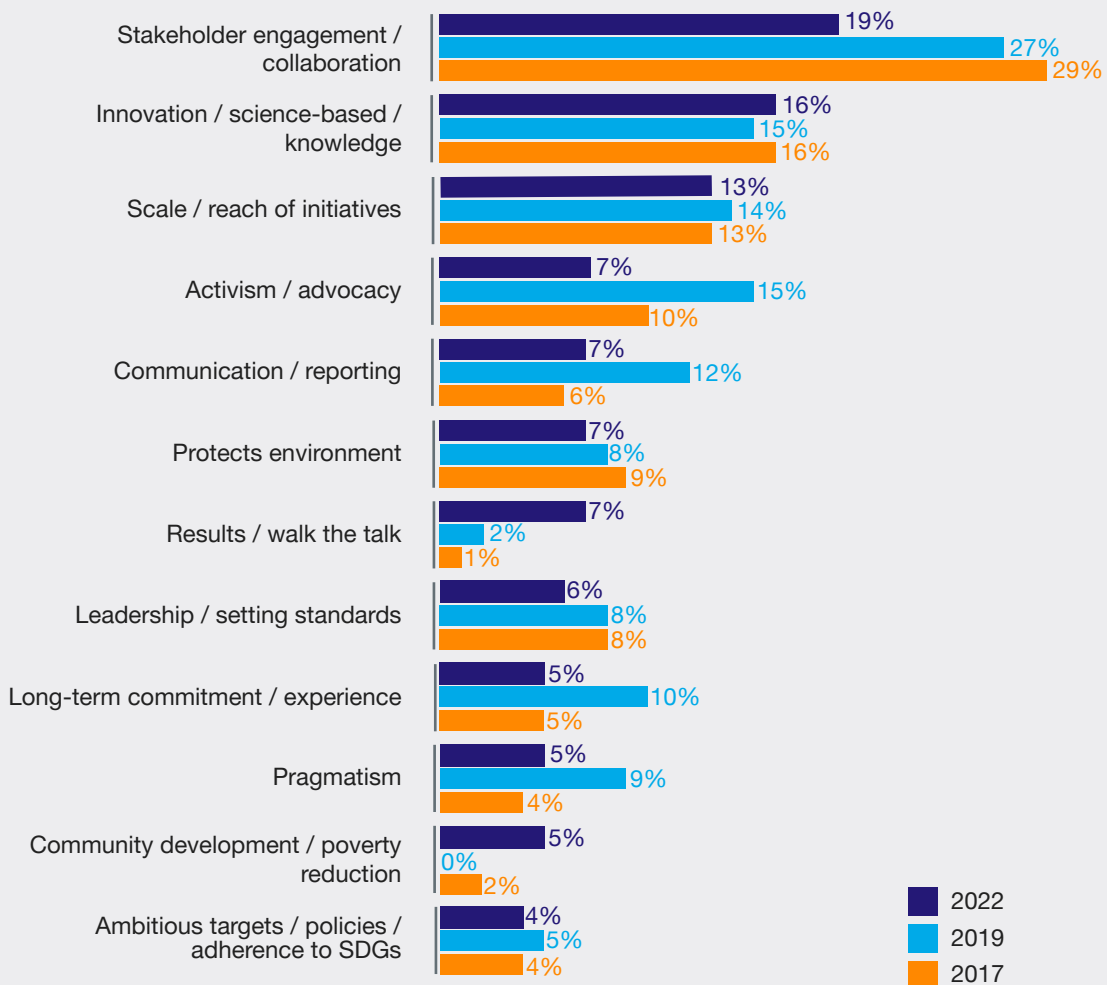
Collaboration and Innovation Drive NGO Leadership

Experts continue to view stakeholder engagement as the main driver for NGO leadership in sustainable development, but this year fewer experts point to this reason for naming a leadership NGO. Fewer experts also mention activism and advocacy compared to 2019. Innovation and knowledge as well as the reach and scale of initiatives are observed by experts to be consistent indicators of NGO leadership in sustainability over time.

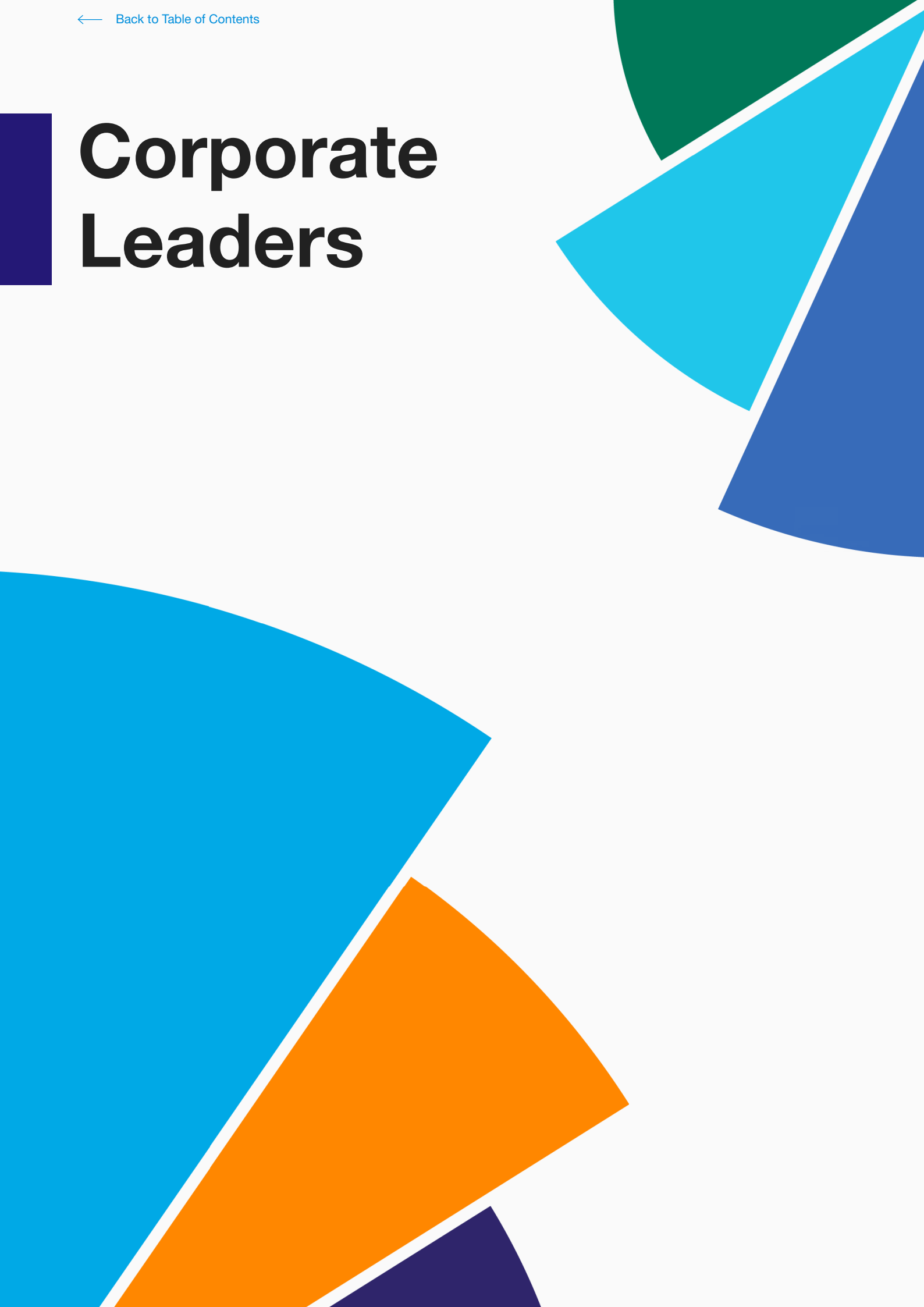


Why do you think [insert NGO #1] is a leader in sustainable development?
Please enter up to two responses in the spaces provided.

% of Experts, Unprompted, Total Mentions, 2017–2022



Corporate Leaders





Unilever, Patagonia, Natura &Co, IKEA, and Microsoft Are the Companies Most Recognized for Their Sustainability Leadership

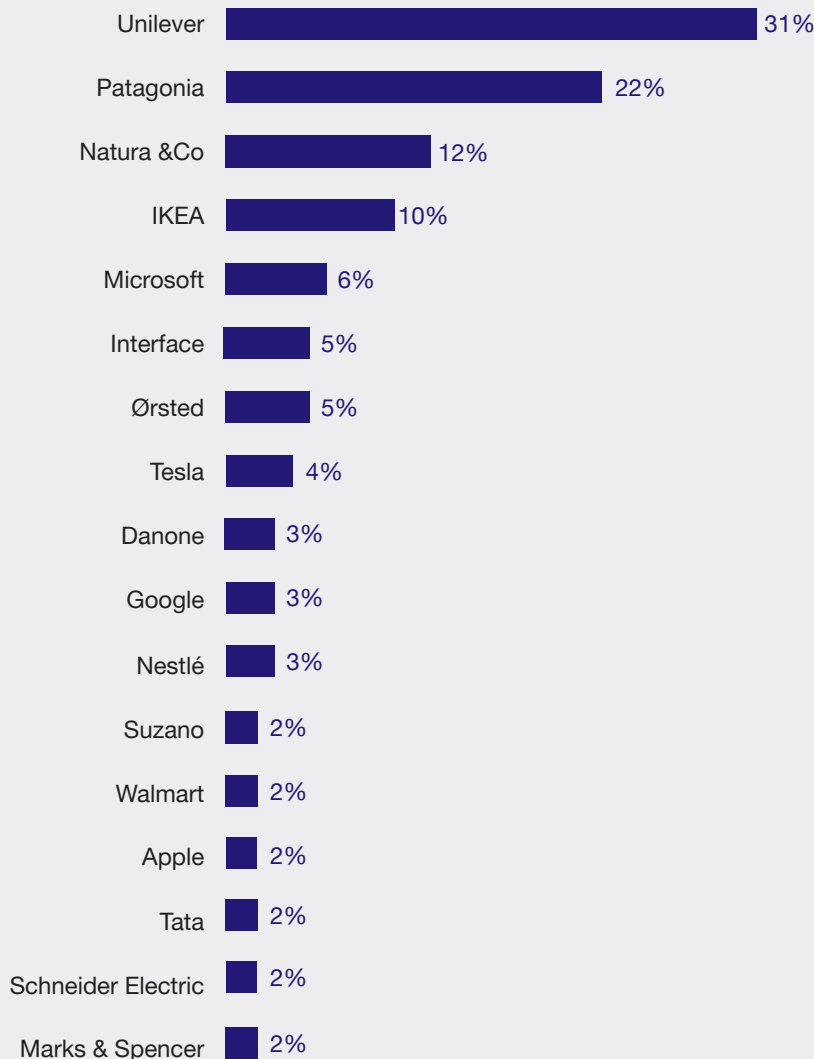
The companies most recognized for their leadership on sustainability remain largely unchanged from the previous year, with Unilever and Patagonia continuing to enjoy significantly more recognition than other organizations. Natura &Co, IKEA, and Microsoft round out the top five, with Microsoft being included in this select group for the first time.



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, Total Mentions, 2022



Recognized Sustainability Leaders Cohort Remains Similar to Previous Years

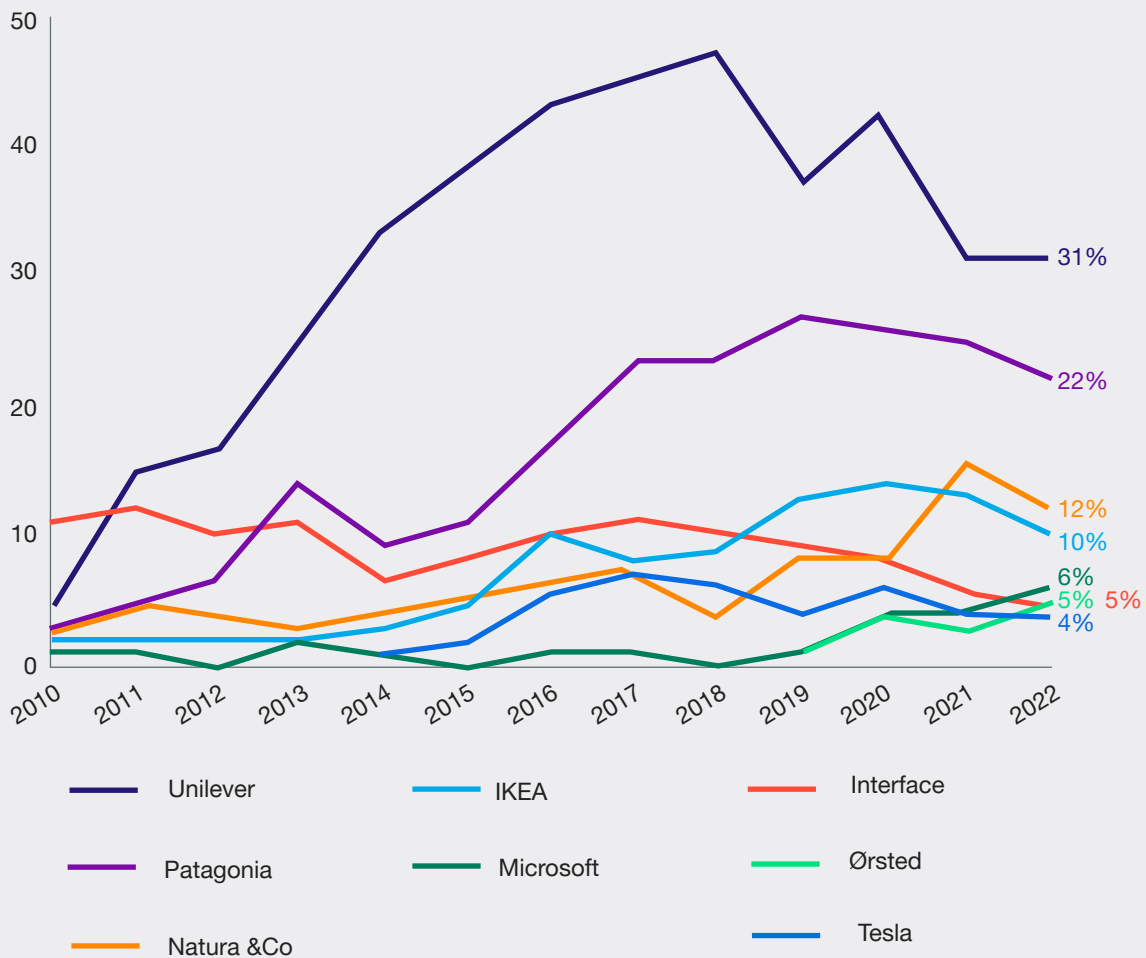
The proportion of sustainability experts selecting Unilever as a sustainability leader remains stable after a marked drop in 2021, with the company retaining its position as most recognized.



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, Total Mentions, 2010–2022



Recognized Leadership Is Increasingly Driven by Impact and Action

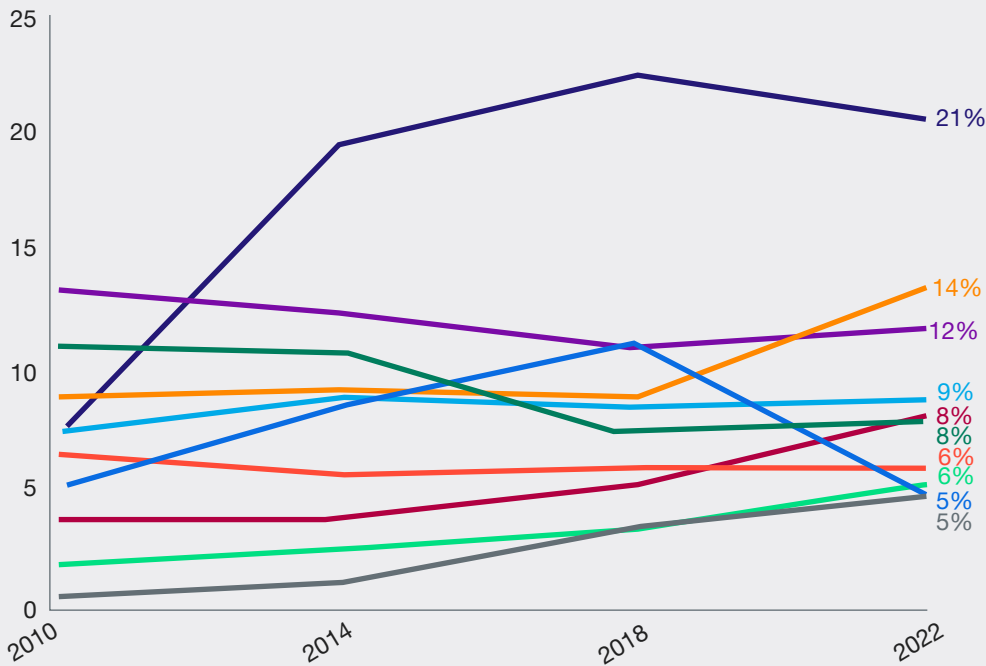
Reasons given for sustainability leadership have evolved over the past twelve years. Companies are increasingly considered as leaders for putting sustainability at the core of their business models and strategies, and for providing evidence and updates on the impacts and results of their sustainability initiatives. Purpose and goals remain important, but experts are increasingly looking for evidence of integration and action.



Q

Why do you think [company #1] is a leader in sustainable development?
Please enter up to two responses in the spaces provided.

% of Experts, Unprompted, Total Mentions, 2010–2022



- Integrated into business strategy
- Strong communications/transparency
- CEO leadership
- Evidence of impacts / actions
- Purpose / values
- Advocacy
- Products / services
- Innovation
- Ambitious targets / goals
- Circular model / solutions

Drivers of Corporate Sustainability Leadership: Quotes from Experts

Below we share some verbatim quotes from respondents around the world on reasons why they name a specific company as a leader on sustainability.



Why do you think [insert company #1] is a leader in sustainable development?

Please enter up to two responses in the spaces provided



Evidence of impact and action

Actions follow commitments. – USA

Based on the results obtained in accordance with sustainable standards. – Iran

Demonstrates commitment to sustainability through actions. – Canada

They have achieved measurable success on both environmental and social issues. – USA

Walk the talk. – India

Integrated into business strategy

Their core business stays aligned with sustainability. – Colombia

Sustainability as a business strategy. – Brazil

Built water security and ocean plastic into business strategy. – India

Products and services

Research and development in energy efficient products. – Nigeria

Delivers product and process needed to transform toward a sustainable world. – Denmark

Recycled content in their products. – Oman



Drivers of Recognized Corporate Leadership Vary across Sectors and Regions

Although putting sustainability at the core of business models and strategy is the top reason experts across all sectors and regions cite for naming a leading company, there are some differences. Corporate sustainability professionals, and those based in the Americas, are more likely than other experts to say integrating sustainability is a reason for leadership. Corporate and service/media professionals are also more likely than those in other sectors to cite evidence of impact and actions as a driver of recognized leadership.



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, by Sector and Region, Unprompted, Total Mentions, 2022

	Most important driver	2nd most important driver	3rd most important driver
NGO	Integrated into business strategy; Products / services (11% each)	Ambitious targets / goals (10%)	Evidence of impacts / action (7%)
Academic / research	Integrated into business strategy (15%)	Product / service (9%)	Evidence of impacts / action; Purpose / values (8% each)
Corporate	Integrated into business strategy (28%)	Evidence of impacts / action (19%)	Product / service (14%)
Service / Media	Integrated into business strategy (22%)	Evidence of impacts / action (16%)	Ambitious targets / goals; Purpose / values (12% each)
Africa / Middle East	Integrated into business strategy (14%)	Products / services (11%)	Evidence of impacts / action; Circular model / solutions (9% each)
Asia-Pacific	Integrated into business strategy (16%)	Evidence of impacts / action (10%)	Products / services (9%)
Europe	Integrated into business strategy (19%)	Evidence of impacts / action (13%)	Purpose / values (12%)
Latin America / Caribbean	Integrated into business strategy; Evidence of impacts / action (25% each)	Products/services (18%)	Ambitious targets / goals; Purpose / values (10% each)
North America	Integrated into business strategy (25%)	Products / services (13%)	Evidence of impacts / action (12%)

Government sector was not included in this analysis due to small sample size



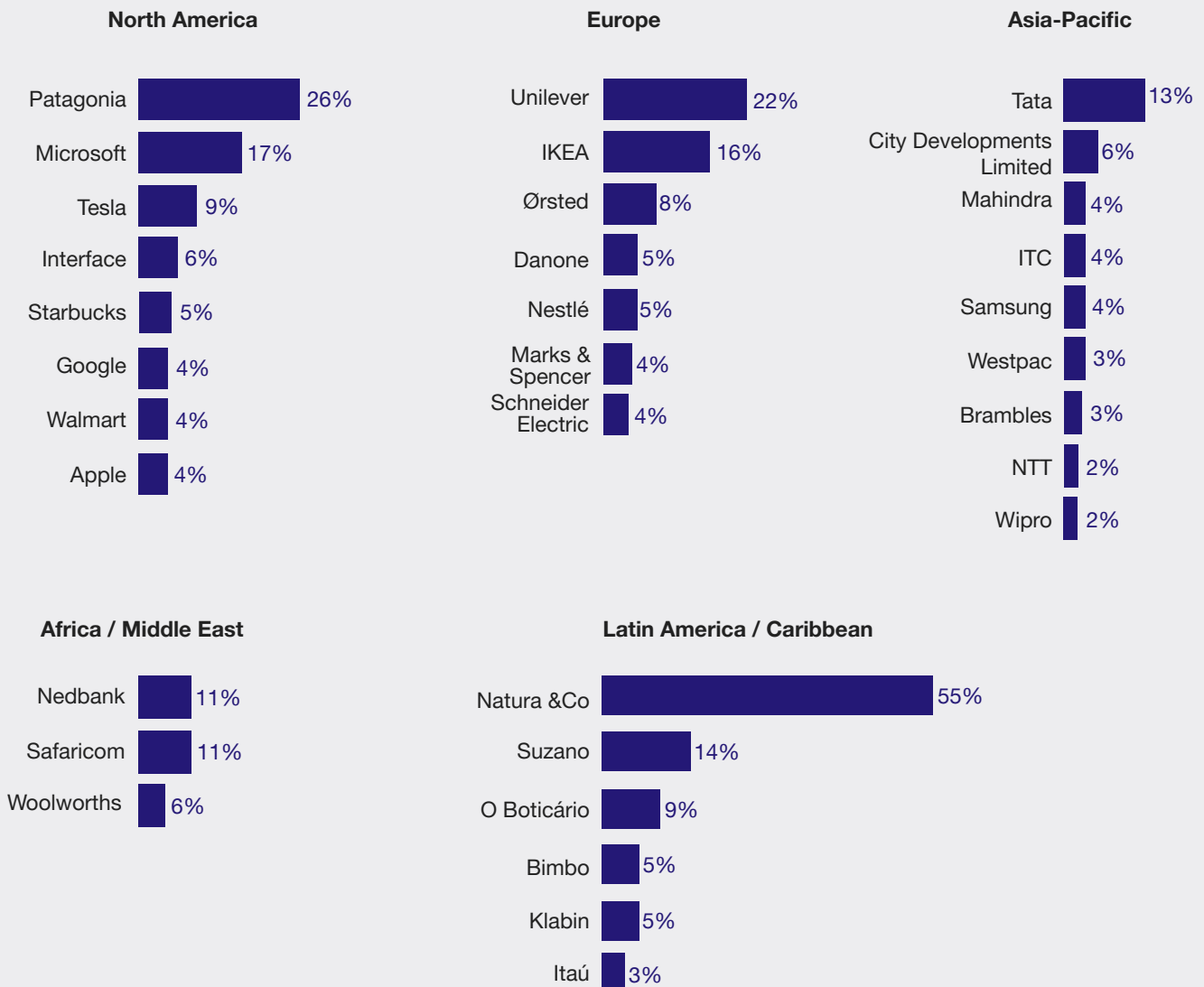
Focus on Regional Leaders Reveals Greater Diversity of Corporate Sustainability Leadership

When experts are asked to identify sustainability leaders among companies headquartered in their regions, a few clear regionally recognized leaders emerge. A majority of experts in Latin America / Caribbean point to Natura &Co, while in Africa / Middle East, only Nedbank, Safaricom, and Woolworths are mentioned by several respondents. Tata stands out in Asia-Pacific, Unilever and IKEA top the rankings in Europe, and Patagonia and Microsoft are most recognized among North American experts.



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.

% of Experts, Unprompted, Total Mentions, 2022



Sector Performance on Sustainability



Almost All Sectors Are Viewed by Experts as Performing Poorly Overall on Transitioning to Sustainability

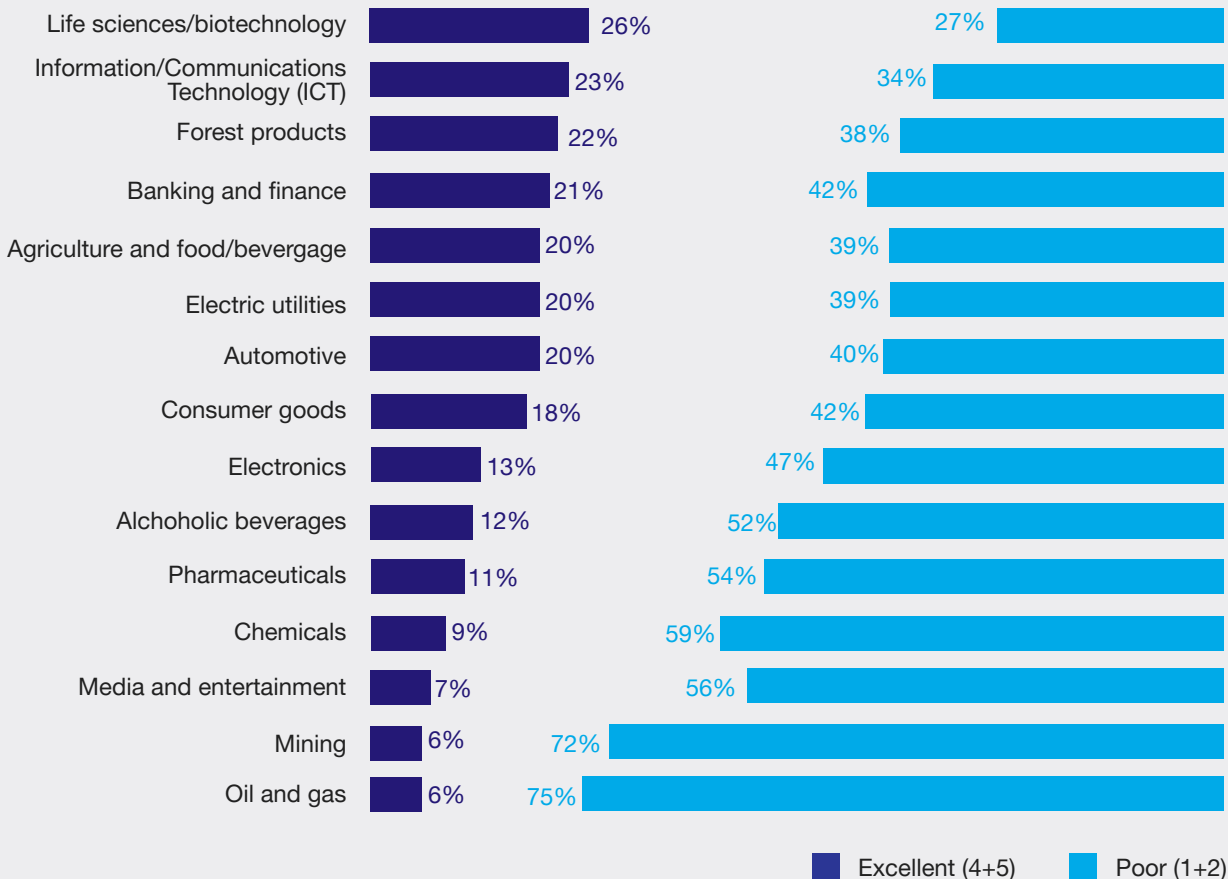


Technology and science-based sectors are viewed most positively by experts on managing their transition to sustainable development within the respective experts' region or country. All other sectors are much more likely to be rated negatively than positively on sustainability transition, especially the extractive sectors.

Q

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

% of Experts, 2022



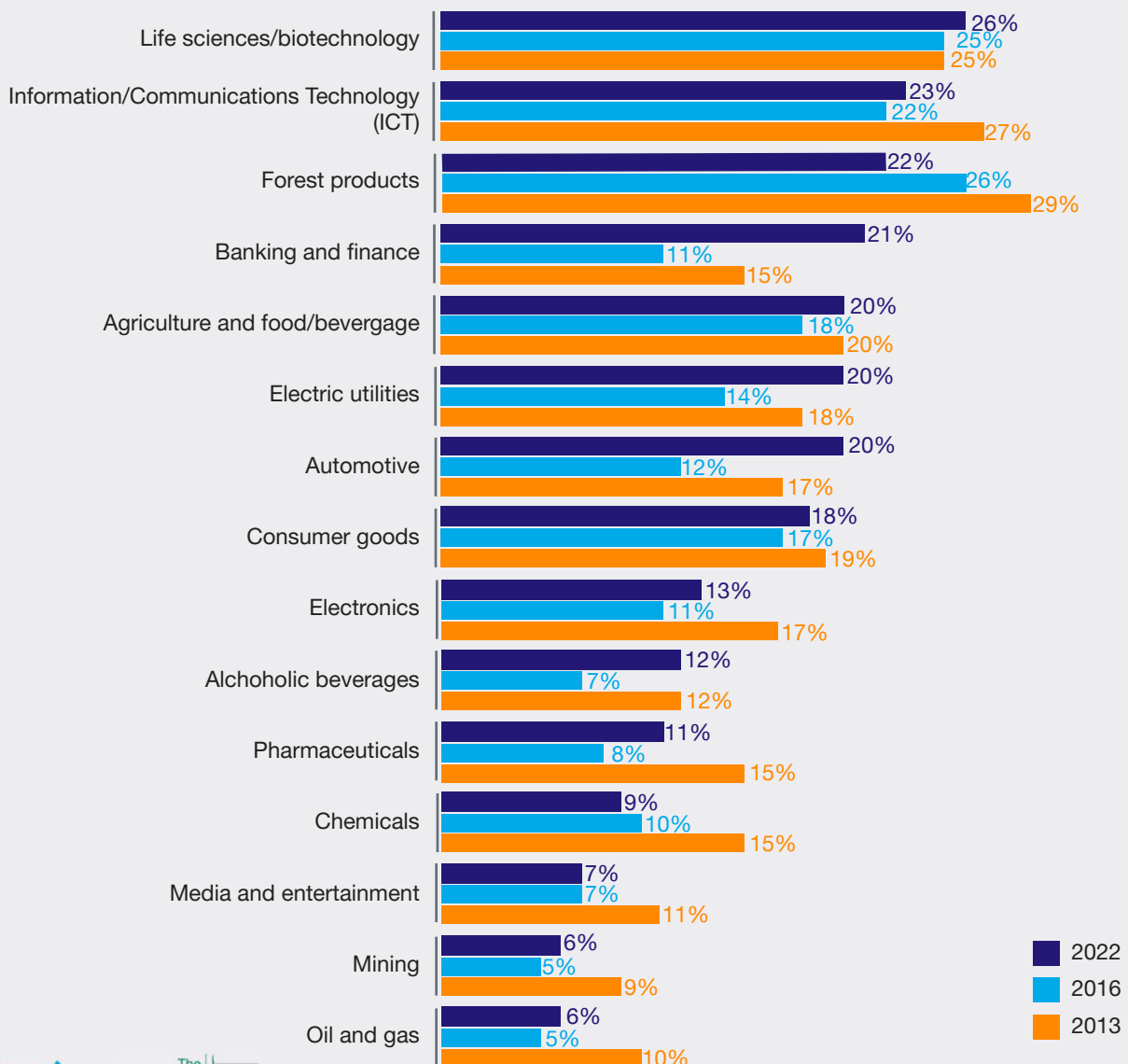
Banking / Finance, Electric Utilities, and Automotive Sectors Are Seen to Be Transitioning to Sustainability Better than They Were a Decade Ago, But Many Sectors Are Seen to Be Doing Worse

Perceptions of sustainability leadership have particularly improved among the banking / finance and automotive sectors since 2013 and 2016. The forest product sector is viewed slightly less favorably this year while the life science / biotechnology industry remains the sector seen to be best managing the transition to sustainable development. The majority of sectors are seen to be managing transition to sustainability less well compared to a decade ago.



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

% of Experts, “Excellent” (4+5), 2013–2022



Sectors Seen as Best Managing Transition to Sustainability Vary by Region

Different sectors come out on top in each region when experts rate their transition toward sustainable development.

Q

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

	Most positively viewed sector	2nd most positively viewed sector	3rd most positively viewed sector
NGO	Information / Communications Technology (ICT) 27%	Life sciences / biotechnology 26%	Automotive 20%
Academic / Research Organization	Life sciences / biotechnology 28%	Information / Communications Technology (ICT) 26%	Agriculture and food / beverage 18%
Corporate	Forest products 26%	Banking and finance; Life sciences / biotechnology 24% 24%	Automotive 23%
Service / Media	Forest products; Life sciences / biotechnology 26% 26%	Banking and finance; Electric utilities 24% 24%	Agriculture and food / beverage 23%
Africa / Middle East	Banking and finance; Life sciences / biotechnology 25% 25%	Information / Communications Technology (ICT) 20%	Electric utilities 19%
Asia-Pacific	Information / Communications Technology (ICT) 36%	Automotive 33%	Life sciences / biotechnology 26%
Europe	Life sciences / biotechnology (30%) 30%	Agriculture and food / beverage 25%	Forest products 24%
Latin America / Caribbean	Forest products 40%	Life sciences / biotechnology 34%	Banking and finance 28%
North America	Automotive 22%	Information / Communications Technology (ICT) 21%	Agriculture and food / beverage; Consumer goods 20% 20%

Government sector was not included in this analysis due to small sample size

Impact of the War in Ukraine on the Sustainable Development Agenda



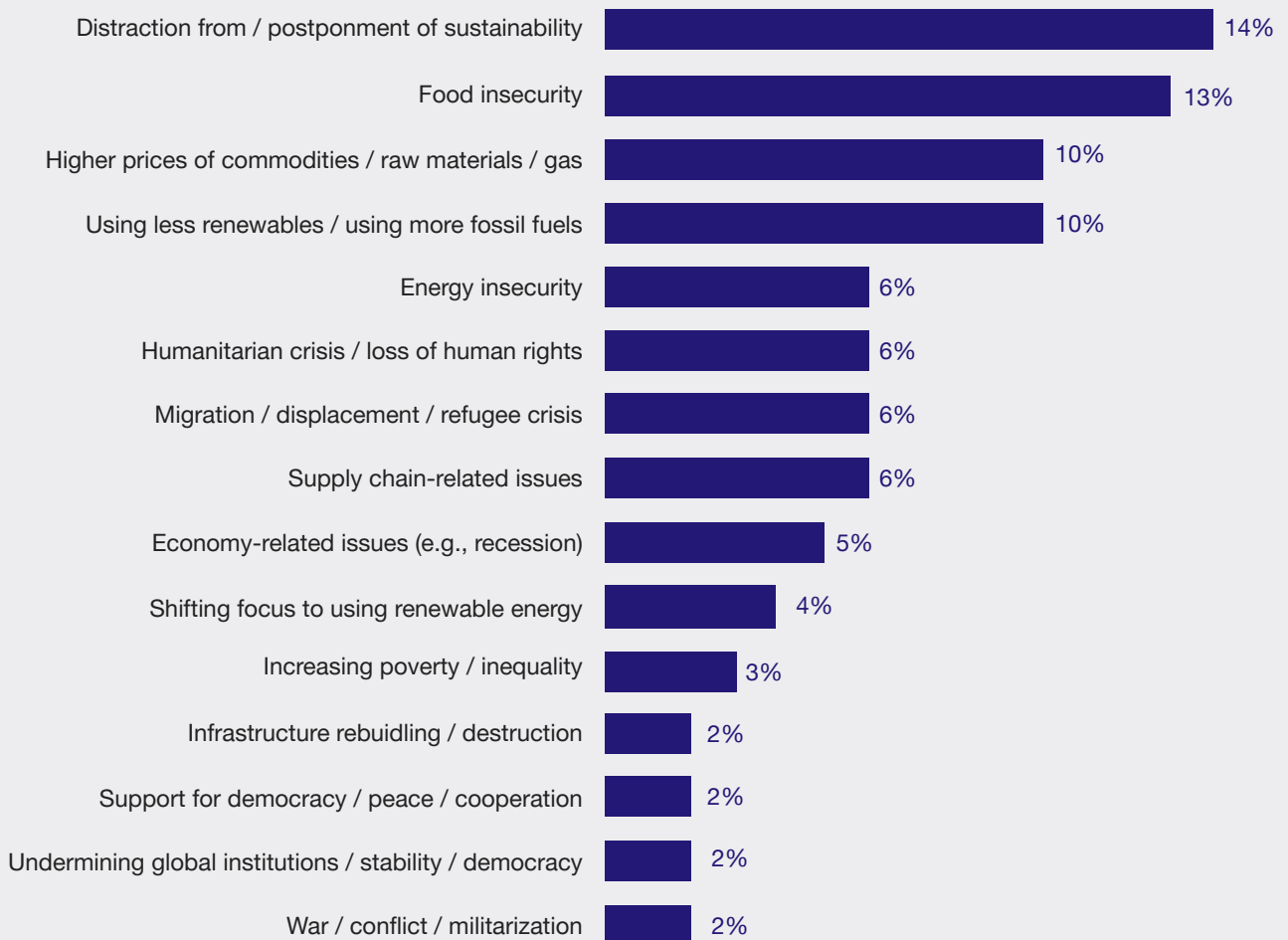
Experts Are Most Likely to Say the War in Ukraine Is Distracting from Sustainability Issues in the Short Term

In addition to being a distraction from sustainability and leading to an increased used of fossil fuels, experts also view food insecurity and higher prices as the more prominent short-term impacts of the war in Ukraine. Relatively few experts believe the war is helping to shift the focus to renewable energy in the short term.



What is the biggest implication of the war in Ukraine on the sustainability agenda? Short term

% of Experts, Unprompted, Total Mentions, 2022



In the Long Term, Experts Say the War in Ukraine May Help Shift Focus toward Using Renewables

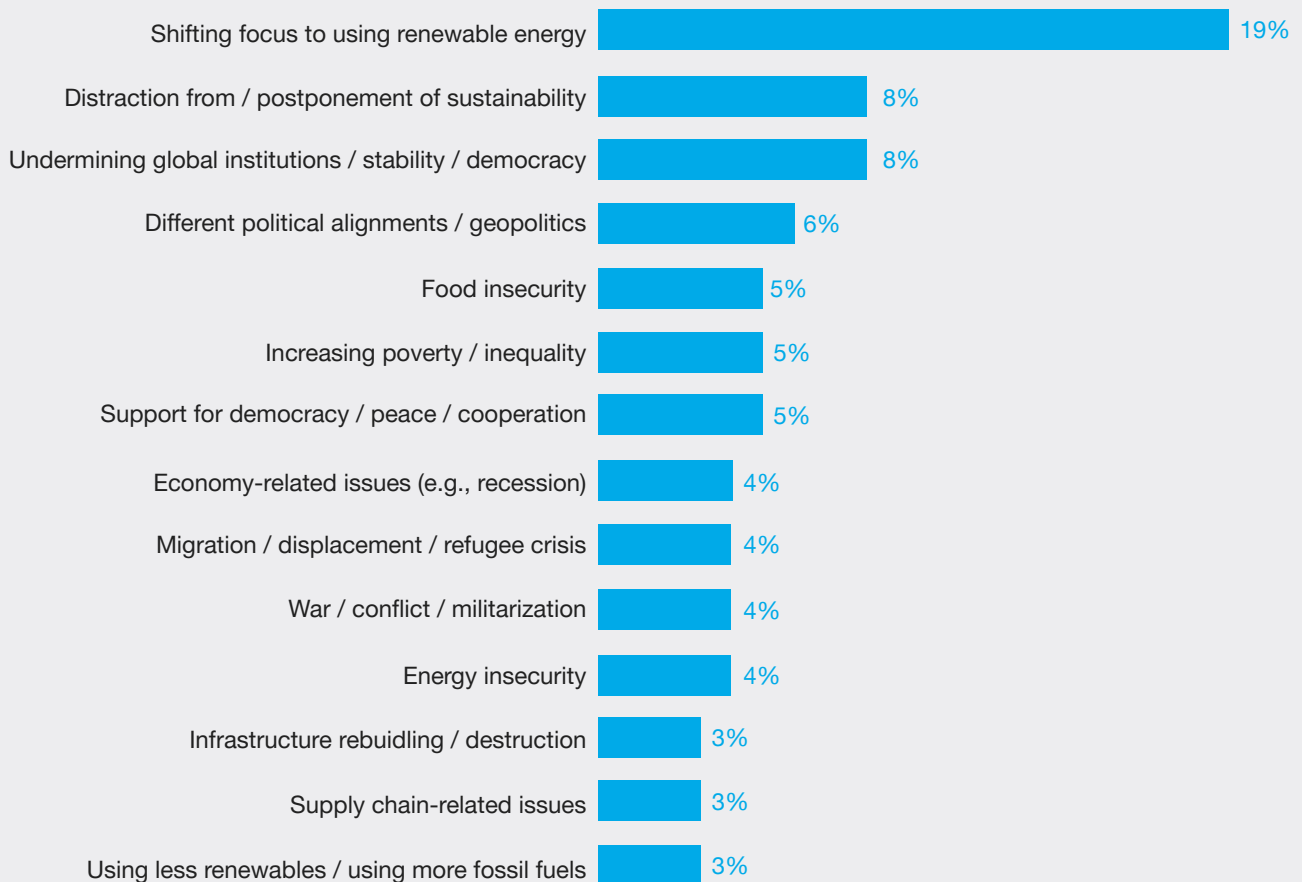


Although most do not see it happening in the short term, experts view the increased focus on using renewable energy as the main long-term effect of the war in Ukraine. However, some believe that the war will remain a distraction from sustainability in the long term. Moreover, some experts predict a change in global and political norms, including the decay of global institutions and democracy, or a completely different geopolitical configuration.



What is the biggest implication of the war in Ukraine on the sustainability agenda? Long term

% of Experts, Unprompted, Total Mentions, 2022



Impacts of the War in Ukraine: Quotes from Experts



Below we share some verbatim quotes from respondents around the world on how the war in Ukraine is likely to impact the sustainable development agenda.



What is the biggest implication of the war in Ukraine on the sustainability agenda?



Shift attention from climate crisis

Singular focus shifting attention from climate crisis to immediate energy and inflationary reactions. – USA (Short term)

Increased cost pressures on business may delay investment in the transition to sustainable business operations.
– UK (Short term)

Food security leading to instability

Instability in the world, especially in relation to food security. – Tunisia (Short term)

Accelerate transition to renewable energy

Move to renewables to decrease dependance on Russian gas.
– Belgium (Long term)

Acceleration to a low-carbon economy.
– Brazil (Long term)

Mistrust in multilateralism

Idea of a “global community” falls, including the legitimacy of organizations like the UN.
– Argentina (Long term)





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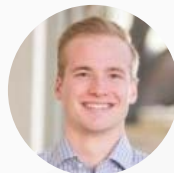
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