

The 2013 *Sustainability Leaders*

A GlobeScan/SustainAbility Survey



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About the GlobeScan / SustainAbility Surveys

The GlobeScan / SustainAbility Surveys offer a unique, collaborative platform that uses research-driven insights, including targeted surveys of the most influential thought leaders in the sustainability arena from over sixty countries, to explore the biggest sustainability challenges.

The thousands of stakeholders surveyed include leading sustainable development experts and practitioners from five sectors:

- Corporate
- Government (including multi-lateral institutions)
- NGOs
- Institutional (e.g., academics)
- Service (e.g., consultants, media)

The GlobeScan / SustainAbility Surveys are in field around six times each year, and provide a regularly updated expert perspective on a range of timely topics.

You can download all the latest surveys from the [GlobeScan](#) or [SustainAbility](#) websites.



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Introduction

“If we achieve our sustainability targets and no one else follows, we will have failed.”

Paul Polman - CEO, Unilever

Another year has passed and the results of the latest GlobeScan/SustainAbility opinion survey on leadership look startlingly similar: Unilever on top. That's not the whole story of course - Patagonia continues its impressive rise in the eyes of our sustainability experts, Puma has entered the "top ten" for the first time ever, and our global expert pool proves that leadership is often best recognized when it's familiar, with respondents most likely to cite leaders headquartered in the regions they are based in. Even Unilever as #1 rises above the status quo, bucking the trend of leadership companies "coming back to Earth" as time passes between the launch of ambitious commitments or initiatives. In fact, Unilever has only continued to rocket past its peers since it first launched the Sustainable Living Plan in 2010.

And therein lies the rub of "leadership as usual," broadly exemplified in "The 2013 Sustainability Leaders" survey: it's not nearly enough. Only national governments - whose paltry leadership on sustainability was recognized by all stakeholder respondents, including experts in government - rank lower than corporate leaders in advancing the sustainability agenda. This is an all too familiar theme in the global workshops and research GlobeScan and SustainAbility have conducted for [The Regeneration Roadmap](#).

So in celebrating Unilever and other business leaders' ambition, achievement and engagement (alongside its fellow changemakers in social enterprise, science and the NGO space), let's remember the quote (above) from Unilever CEO Paul Polman: leaders are only as successful as those who are inspired to follow in their path.

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Survey methodology



<i>Demographics</i>	Government	NGO	Academic / Research	Corporate	Service / Media	Other	Total
Asia	8	9	26	36	21	2	102
Africa / Middle East	3	8	12	17	11	3	56
Europe	10	31	64	99	84	21	310
North America	29	61	115	217	110	39	571
Oceania	2	4	13	12	12	4	47
Latin America / Caribbean	5	8	16	19	19	5	73
DK/NA	2	0	4	2	3	0	9
Total	59	123	250	402	260	74	

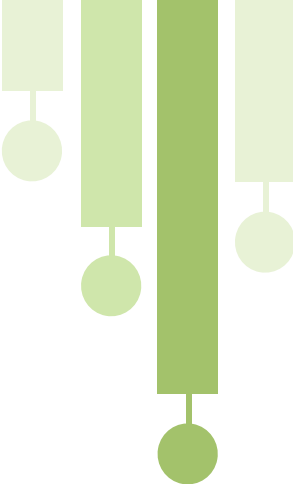
- 1,170 qualified sustainability experts completed the online questionnaire from February 20 to March 14, 2013.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 73 countries in Asia, Africa / Middle East, Europe, North America, Latin America / Caribbean, Australia / New Zealand, and comprise a highly-experienced respondent pool:
 - 53 percent have more than ten years of experience working on sustainability issues.
 - 30 percent have five to ten years of experience.
 - 16 percent have three to four years of experience.
 - Respondents with less than three years of sustainability experience have been excluded from the results.

Note to Readers

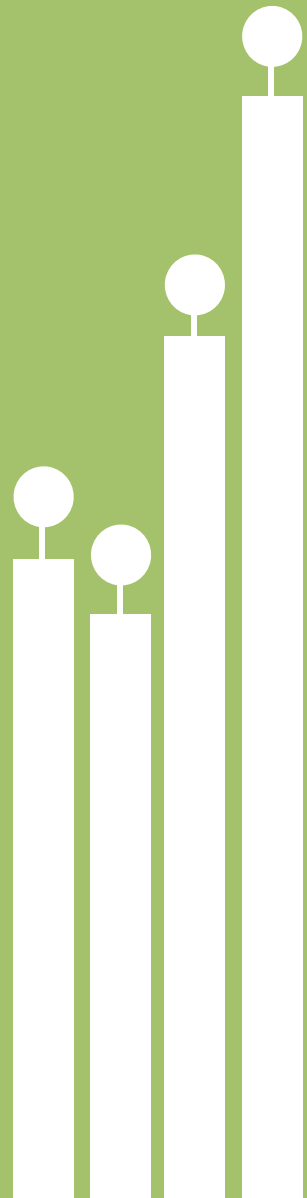
All figures in the charts and tables in this report are expressed in percentages, unless otherwise noted. Total percentages may not add to 100 because of rounding.

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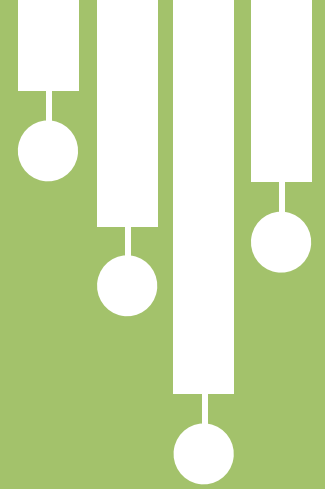
Key findings



- National governments are seen as demonstrating the poorest leadership on sustainability over the last year.
- While social entrepreneurs have rebounded in 2013 and are now perceived as the sector advancing the sustainability agenda most, opinion of NGOs remains low compared to where it ranked two years ago.
- Experts find only national governments' performance in advancing sustainability poorer than corporate leaders.
- There is broad consistency in leadership opinions across the world; Social entrepreneurs are perceived as the leading actors advancing sustainability in all regions but Africa / Middle East.
- Unilever captures the top spot for third year in a row, while Patagonia catapults to #2 position on back of strong gains in last year; Puma has entered the top ten after not appearing on the list in 2011.
- Unilever has not only been able to sustain its leadership position since the launch of the Sustainable Living Plan in 2010, but increase it considerably. This is even more impressive when compared to other leadership companies who have “come down to Earth” after an initial bump from the launch of ambitious commitments or initiatives.
- Experts in developing countries are most likely to cite leadership companies from the regions in which they are based (for example, Natura in the Latin American/Caribbean region). This largely holds for experts in Europe and North America as well. In fact, when asked to name leadership companies headquartered in developing countries, Natura and Tata are the only companies that garner more than 1% of mentions in Europe and North America.
- A commitment to sustainable values remains the primary reason a company is cited as a sustainability leader, while transparency and communication, integration into core business model and environmental, waste, and water management have risen in importance in 2013.

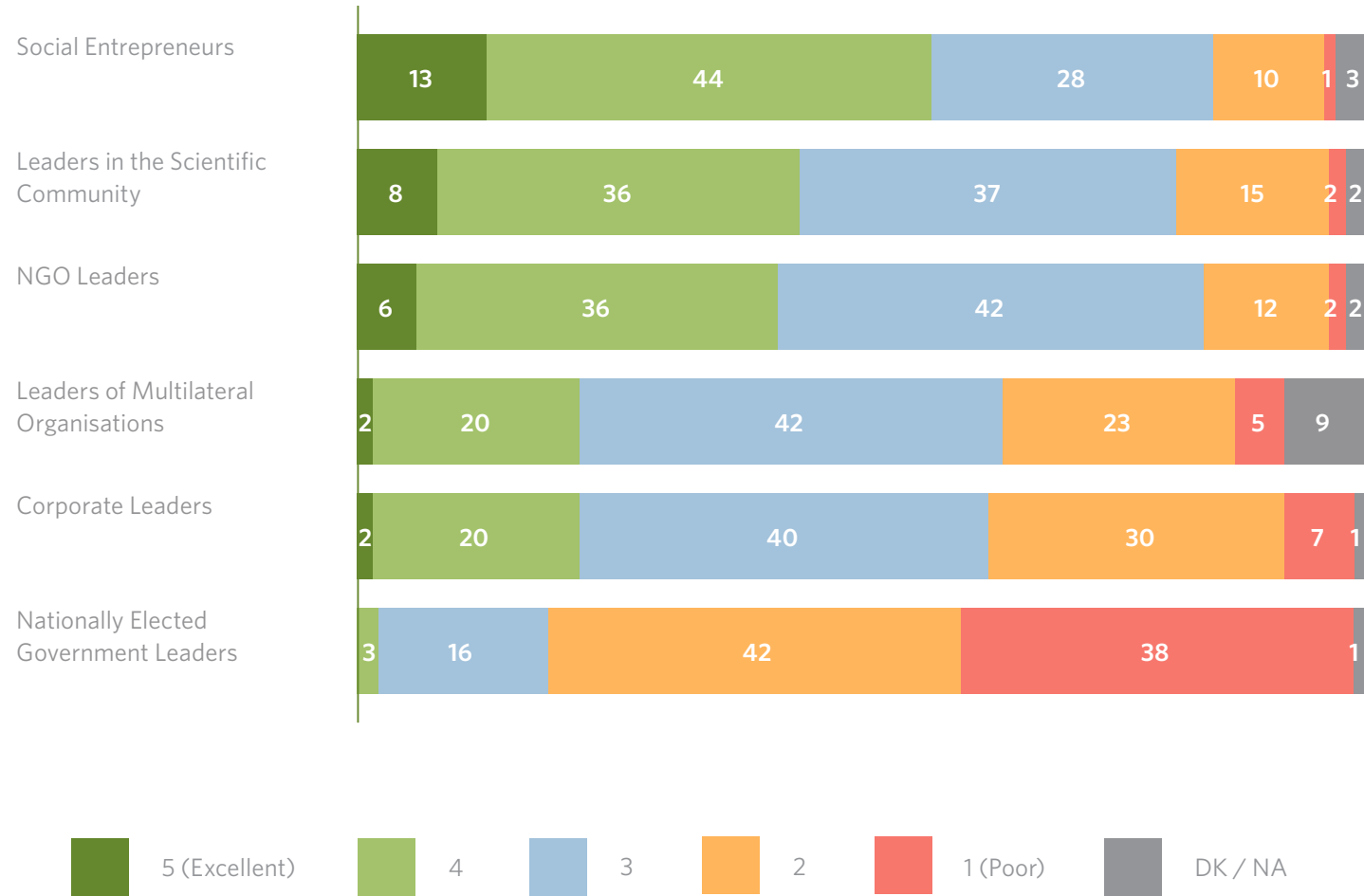


Institutional Leaders on Sustainability



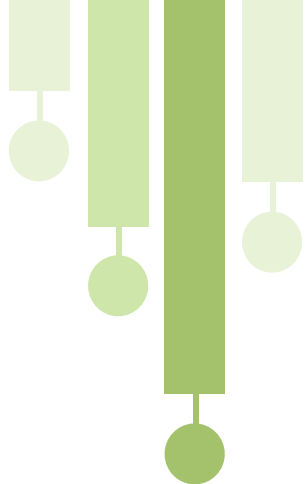
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National governments are seen as demonstrating the poorest leadership on sustainability over the last year.

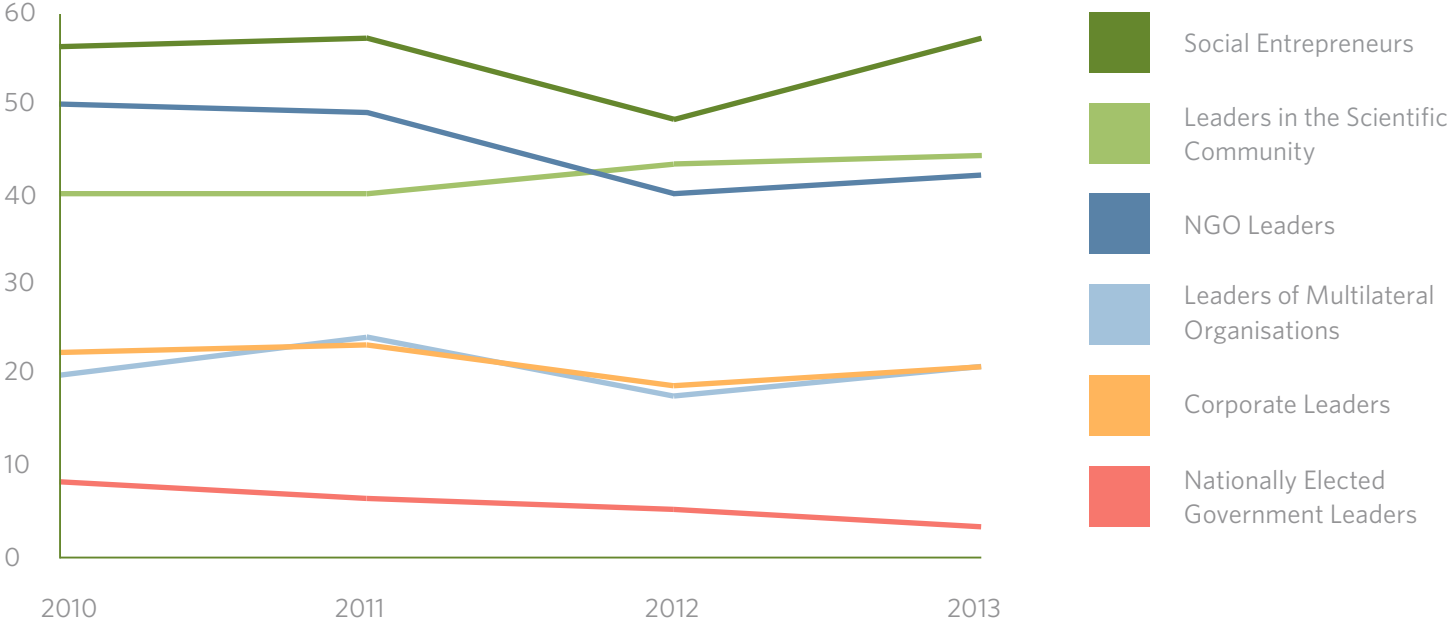


Question
Please rate the overall performance of each of the following types of leaders in advancing the sustainability agenda over the past year?

While social entrepreneurs' leadership has rebounded in 2013, opinions of NGO leadership remain lower than in years past; Government leadership has declined every year since 2010.



"Excellent" (4+5)



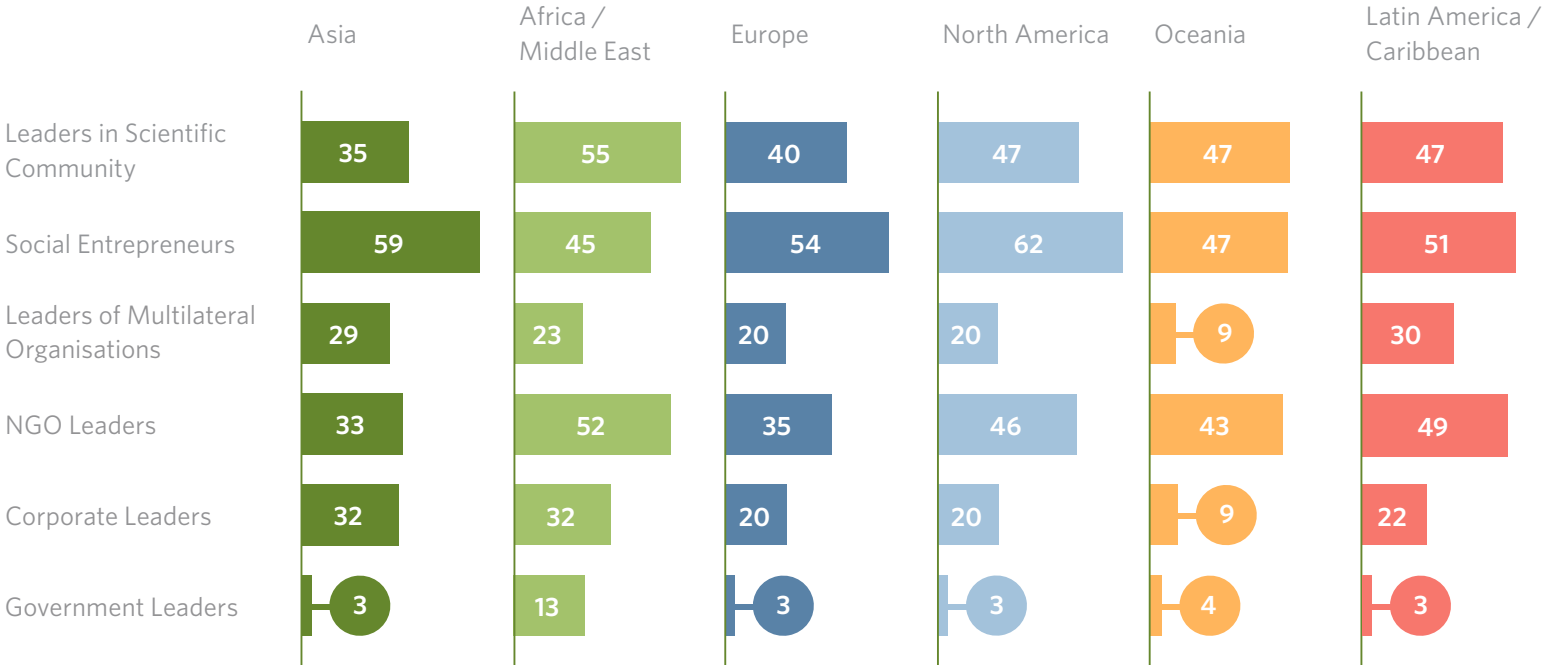
Question
Please rate the overall performance of each of the following types of leaders in advancing the sustainability agenda over the past year?

There is broad consistency in leadership opinions across the world; Social entrepreneurs are perceived as the leading actors advancing sustainability in all regions but Africa / Middle East.



Performance on Sustainability Leadership by Different Types of Leaders

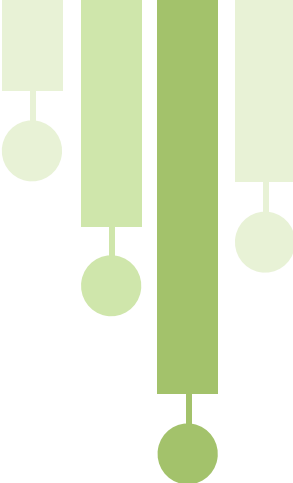
Total "Excellent" by Region, 2013



Question
Please rate the overall performance of each of the following types of leaders in advancing the sustainability agenda over the past year?

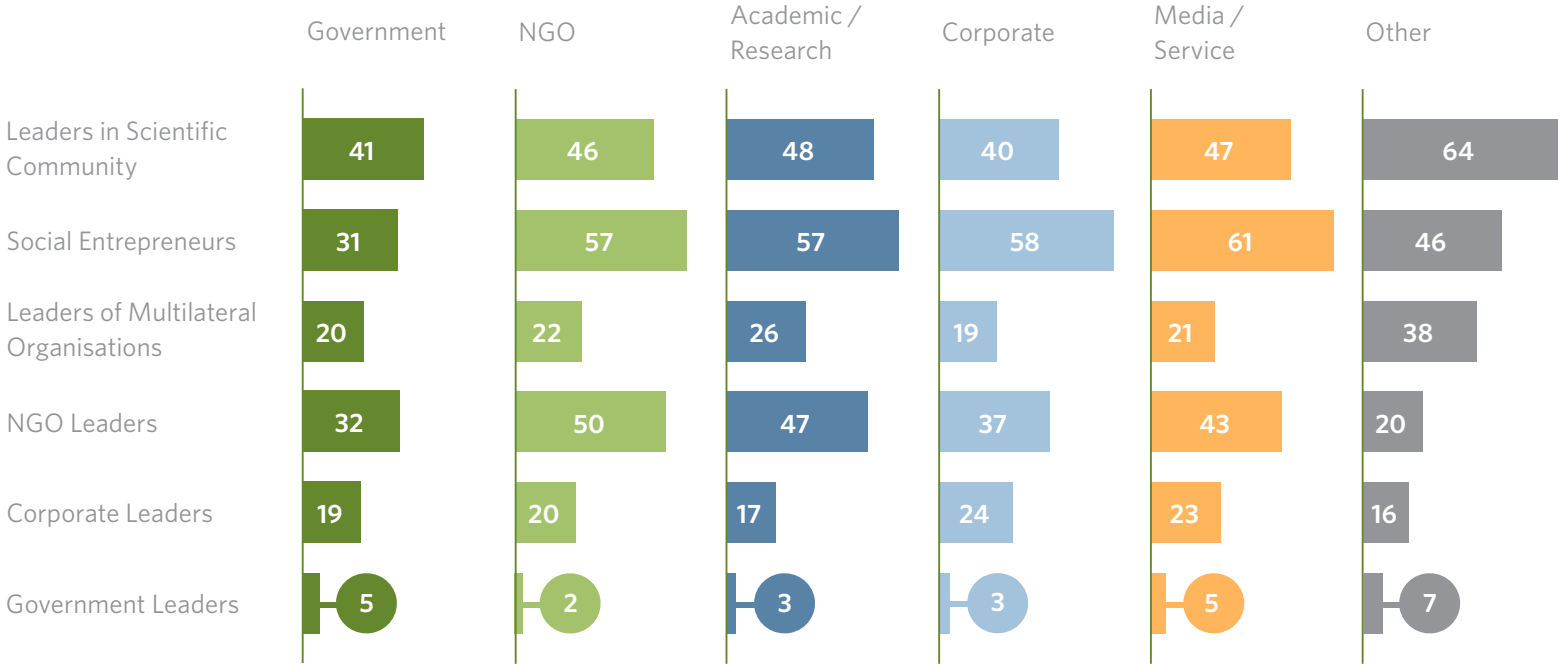
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Government leadership is consistently rated lowest across all stakeholder audiences, including by experts in government.



Performance on Sustainability Leadership by Different Types of Leaders

Total "Excellent" by Stakeholder, 2013



Question
 Please rate the overall performance of each of the following types of leaders in advancing the sustainability agenda over the past year?



Corporate Leaders on Sustainability

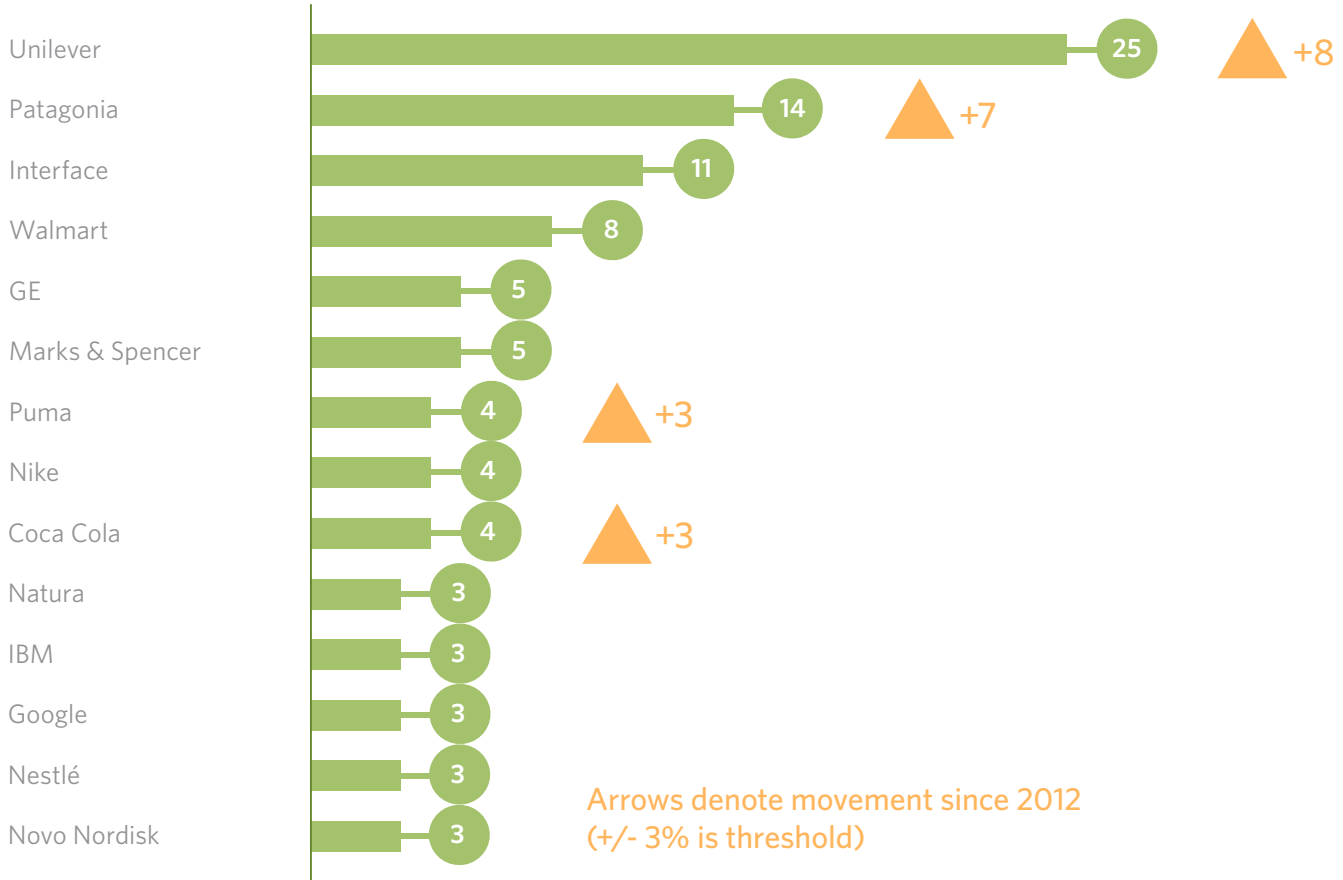
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Unilever captures the top spot for third year in a row; Patagonia catapults to the #2 position on the back of strong gains in the last year.



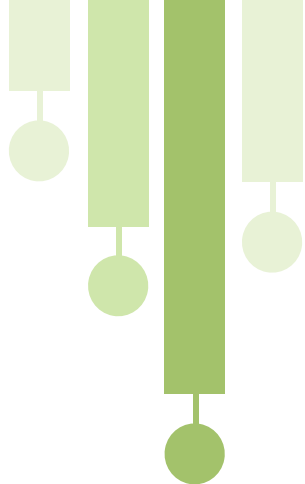
% of Total Mentions, All Respondents, 2013



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

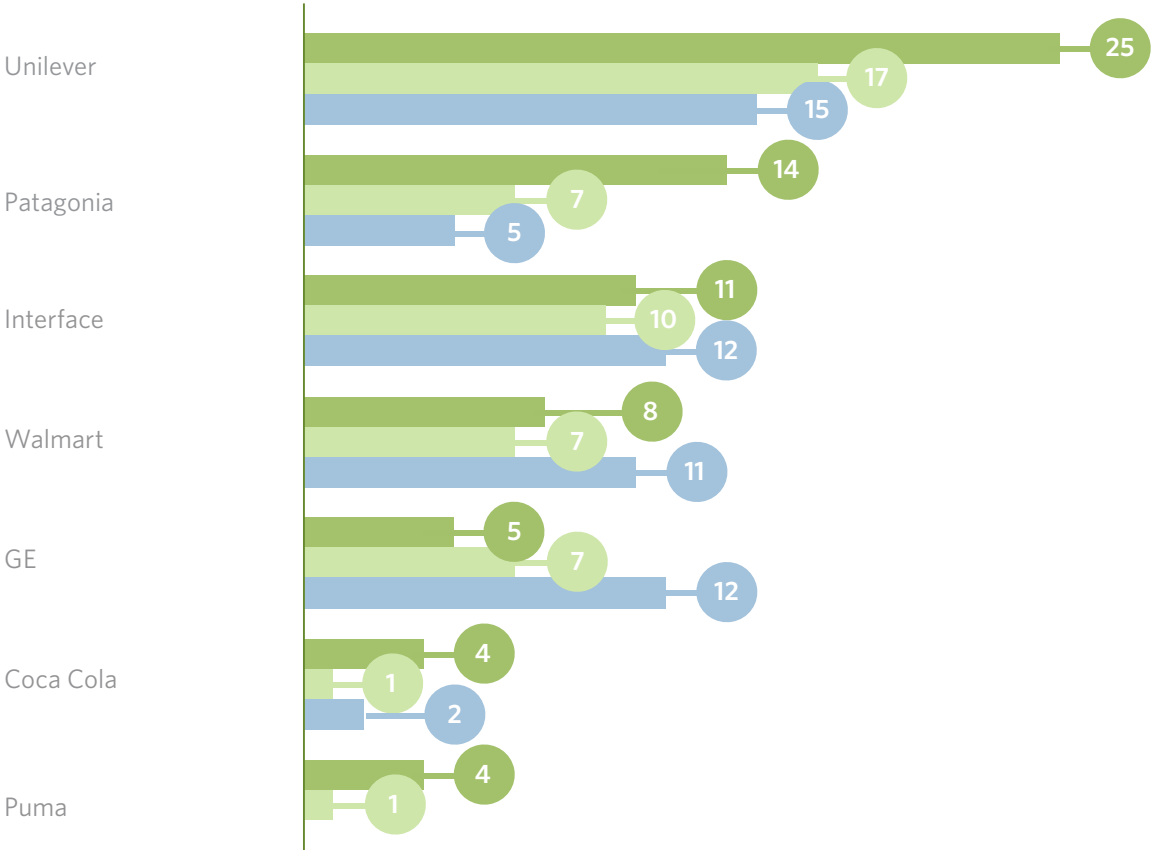
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Unilever and Patagonia show significant gains in 2013; Puma has entered the top ten after not appearing on the list in 2011.



% of Total Mentions, All Respondents, 2013

2013 2012 2011



Question

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

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Unilever is rated strongest by corporate peers, NGOs and service/media; Patagonia is the highest-rated company among academics/researchers and tied with Walmart among government experts.



Leaders by Stakeholder Type

% Total Mentions, Unprompted, 2013

	Government	NGO	Academic / Research	Corporate	Service / Media
Unilever	8	26	16	29	30
Patagonia	12	10	20	12	14
Interface	7	11	12	11	10
Walmart	12	6	6	10	7
GE	2	3	6	5	6
Marks & Spencer	7	8	2	5	6

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

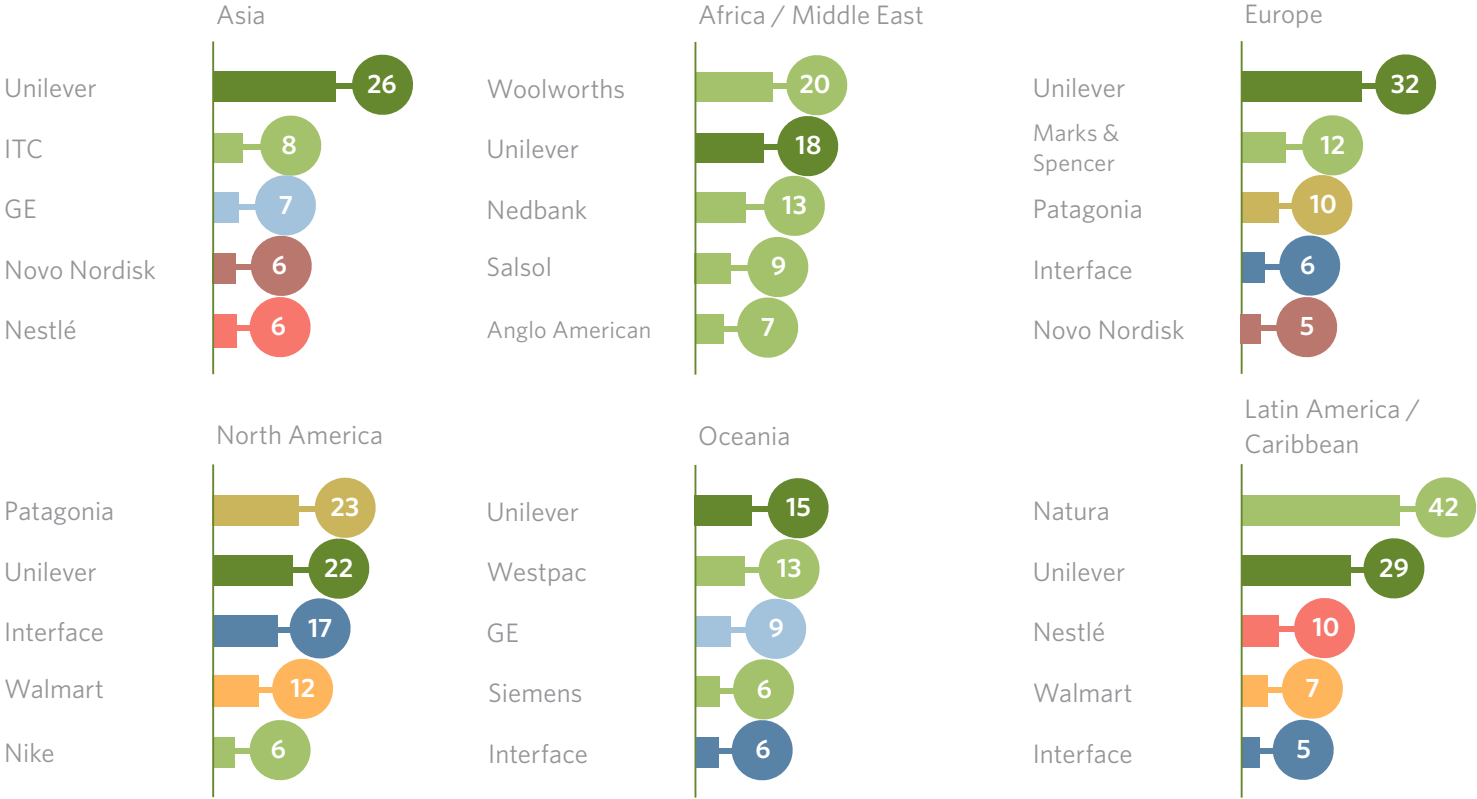
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Unilever’s leadership status is consistent across geographies, with particular resonance in Europe and Asia. Interface also enjoys great geographical breadth and is cited as a leader in every geography except Africa/Middle East. Interestingly, GE is mentioned as “top 3” leader in Asia and Oceania, but is not regarded among top leaders in North America.



Sustainability Leaders by Region

% Total Mentions, Unprompted, 2013



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

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*Spotlight on
Corporate Leaders in
Emerging Markets*

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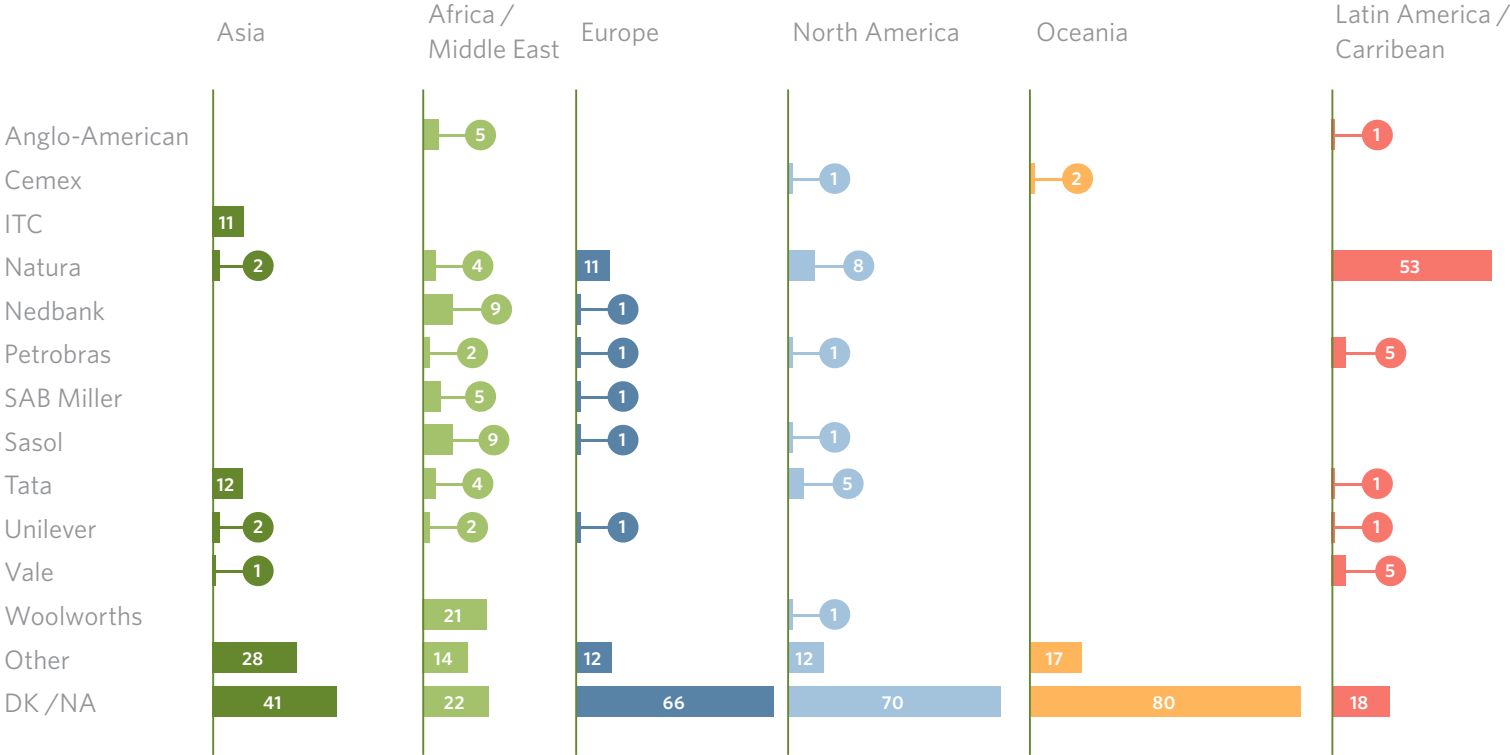
A GlobeScan/SustainAbility Survey

Experts in developing countries are most likely to cite leadership companies from the regions in which they are based (for example, Natura in the Latin American/ Caribbean region); Natura and Tata are the only companies that garner more than 1% of mentions from experts in Europe and North America.



Companies in the Developing World who are Leaders at Integrating Sustainability into Strategy

Unprompted, by Region, 2013



Question
 What specific companies that are headquartered in emerging economies (e.g., in Africa, Asia, and Latin America) do you think are leaders in integrating sustainability into their business strategy?

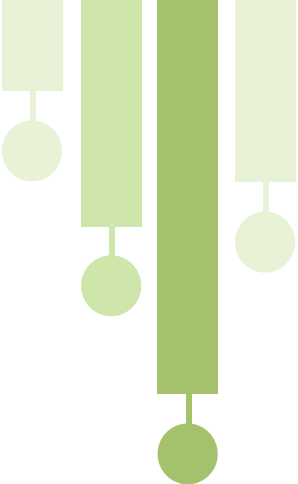


*Spotlight on Rising
Corporate Leaders*

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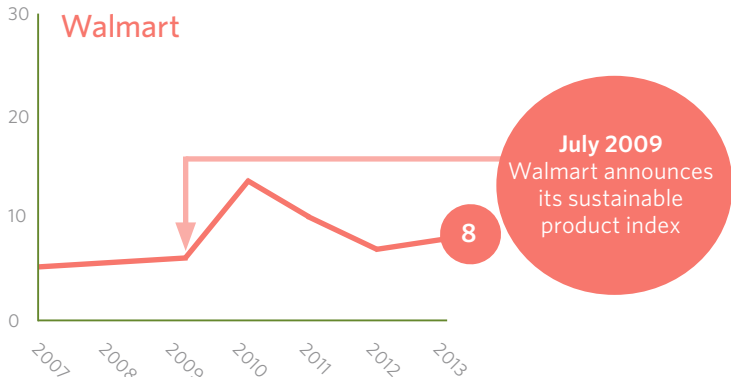
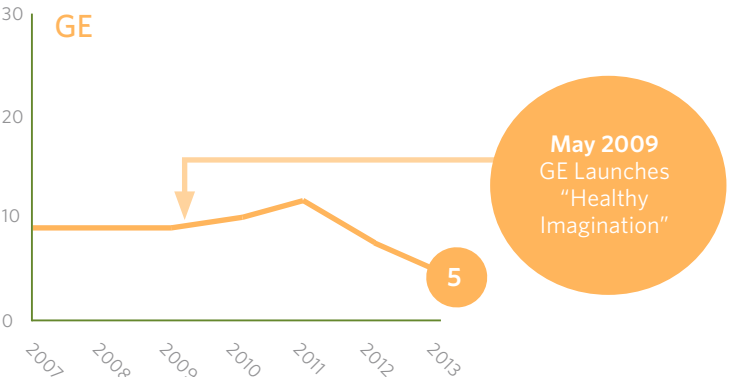
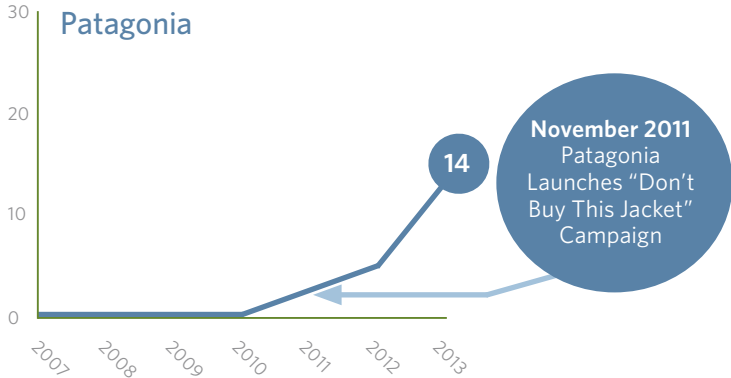
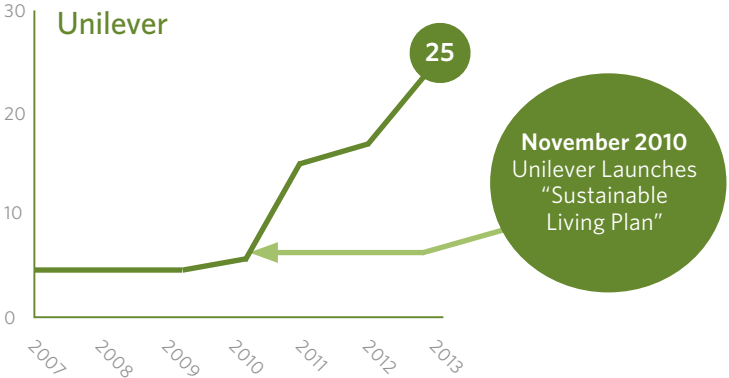
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The combination of relative ambition, effective communications and follow-through is vital to capturing and holding the imagination of sustainability experts, as Unilever proves; even where follow-through is robust, experts still exhibit “what have you done for me lately?” thinking.



Companies with the Greatest Commitment to Sustainability

Unprompted, Combined Mentions, Trends 2007 - 2013



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

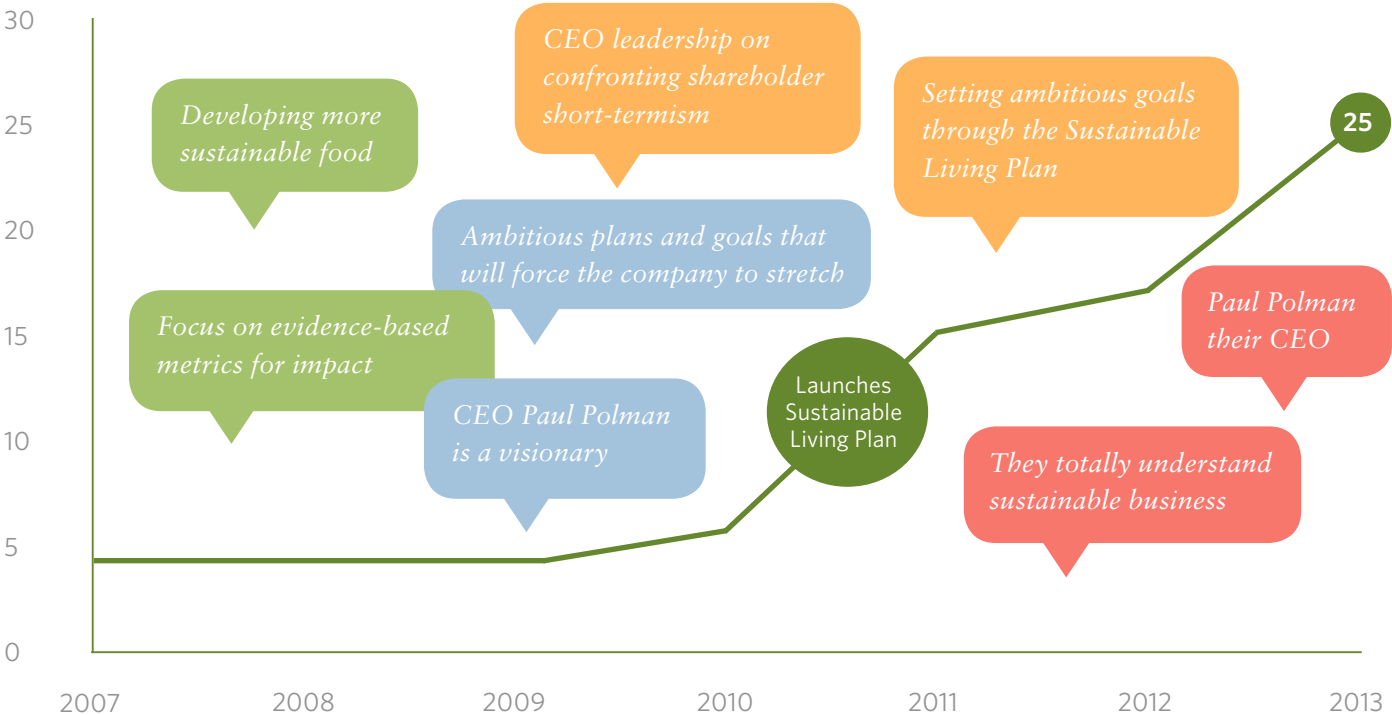
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Unilever has evolved from targeted, issue-based efforts to broad-based ambition and rhetorical leadership that confronts systemic challenges.



Reason a Company Is Considered a Sustainability Leader

Respondent Feedback, Unilever, 2010 - 2013



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

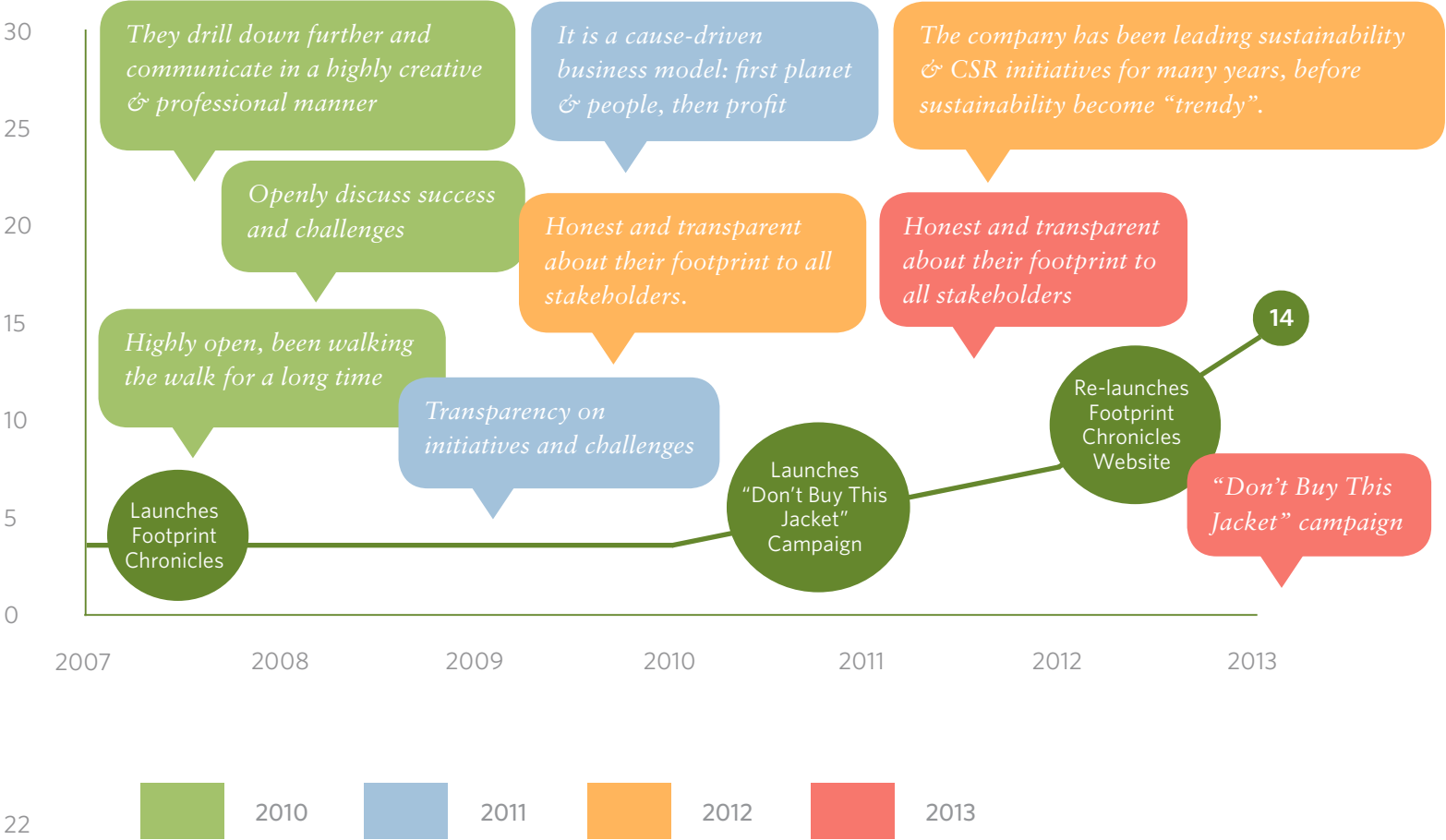


Commitment and transparency are consistent hallmarks of Patagonia's leadership, but a significant rise occurred after "Don't Buy This Jacket" provocation and campaign.



Reason a Company Is Considered a Sustainability Leader

Respondent Feedback, Patagonia, 2010 - 2013



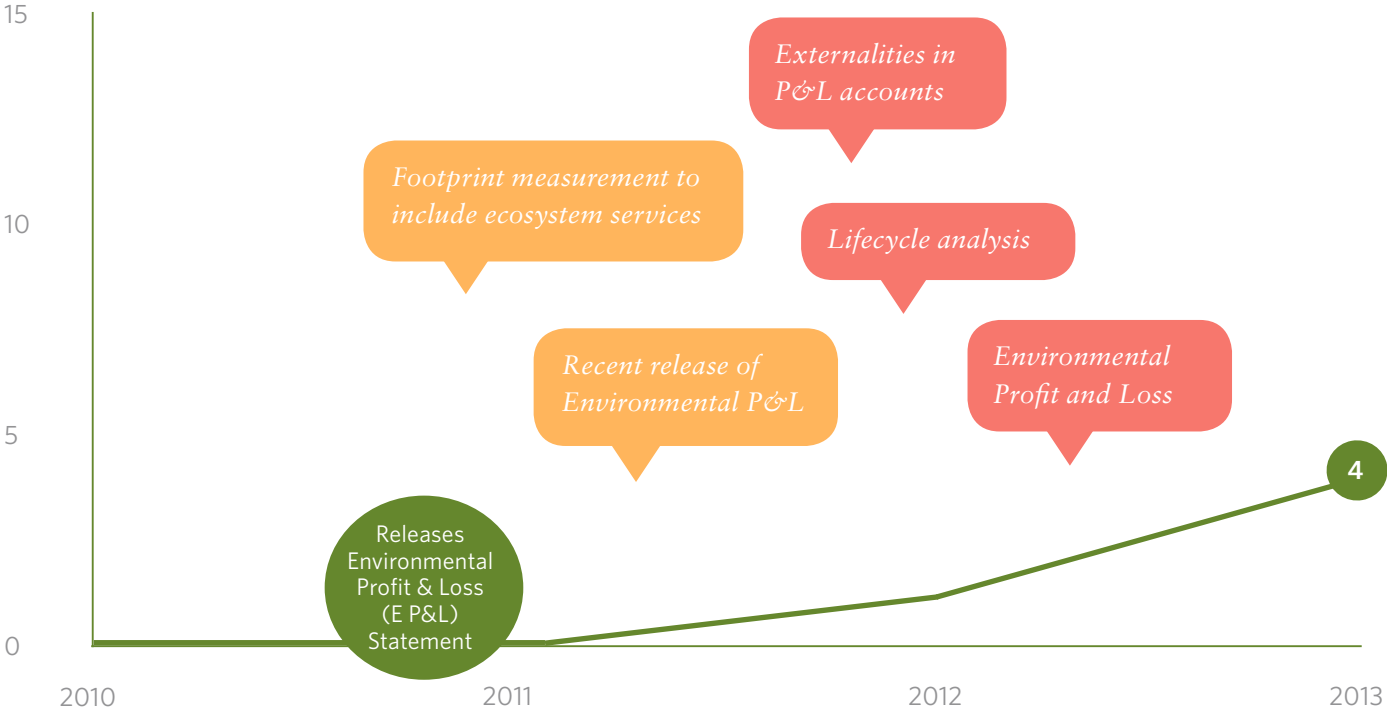
Question
 What specific companies do you think are leaders in integrating sustainability into their business strategy?

Puma's rise in the eyes of experts can solely be attributed to releasing its Environmental Profit & Loss (E P&L) statement.



Reason a Company Is Considered a Sustainability Leader

Respondent Feedback, Puma, 2010 - 2013



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

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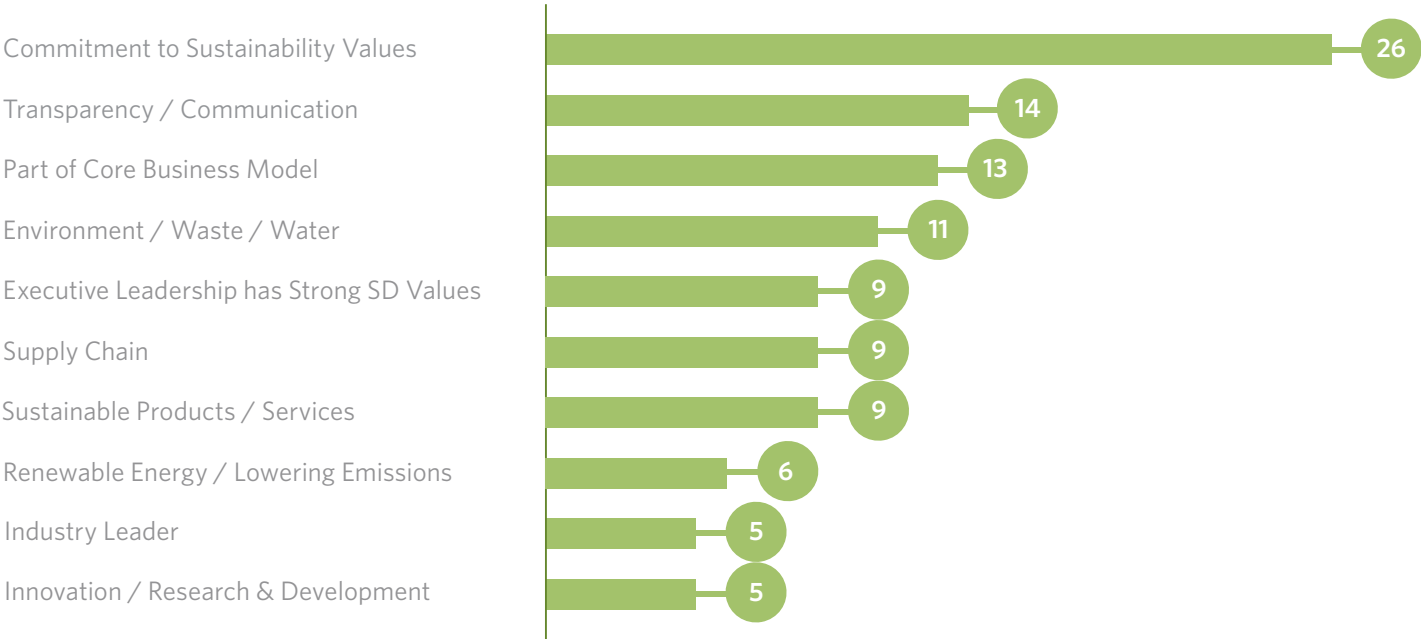
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A commitment to sustainable values remains the primary reason a company is cited as a sustainability leader.



Reason a Company Is Considered a Sustainability Leader

% of Total Mentions, All Respondents, 2013



Question
Why do you think [INSERT COMPANY #1 FROM ABOVE] is a leader in integrating sustainability into their business strategy?

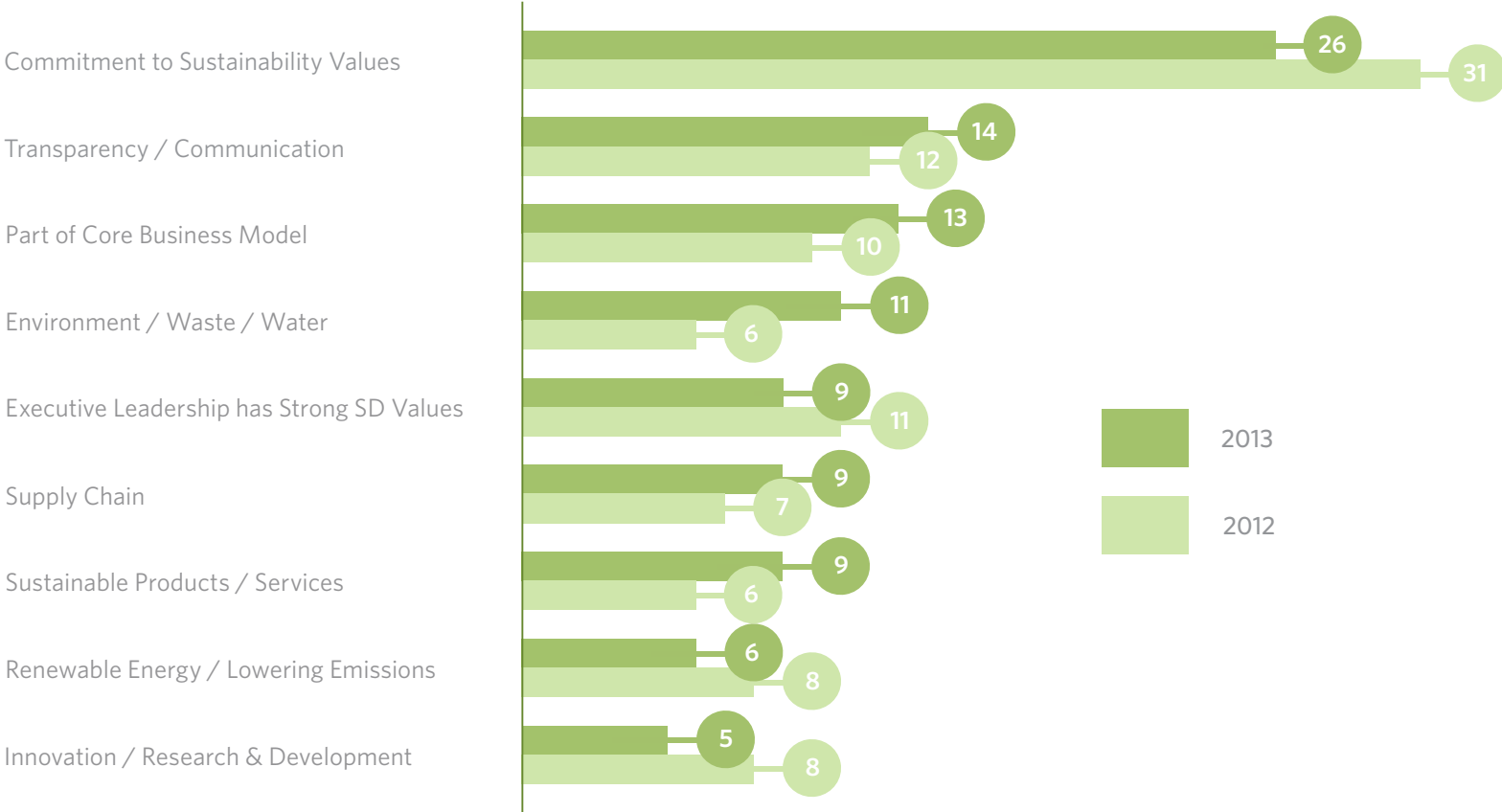
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Transparency/communication, integration into core business model and environmental/waste/water management are more important factors in 2013 for determining corporate sustainability leadership.



Reason a Company Is Considered a Sustainability Leader

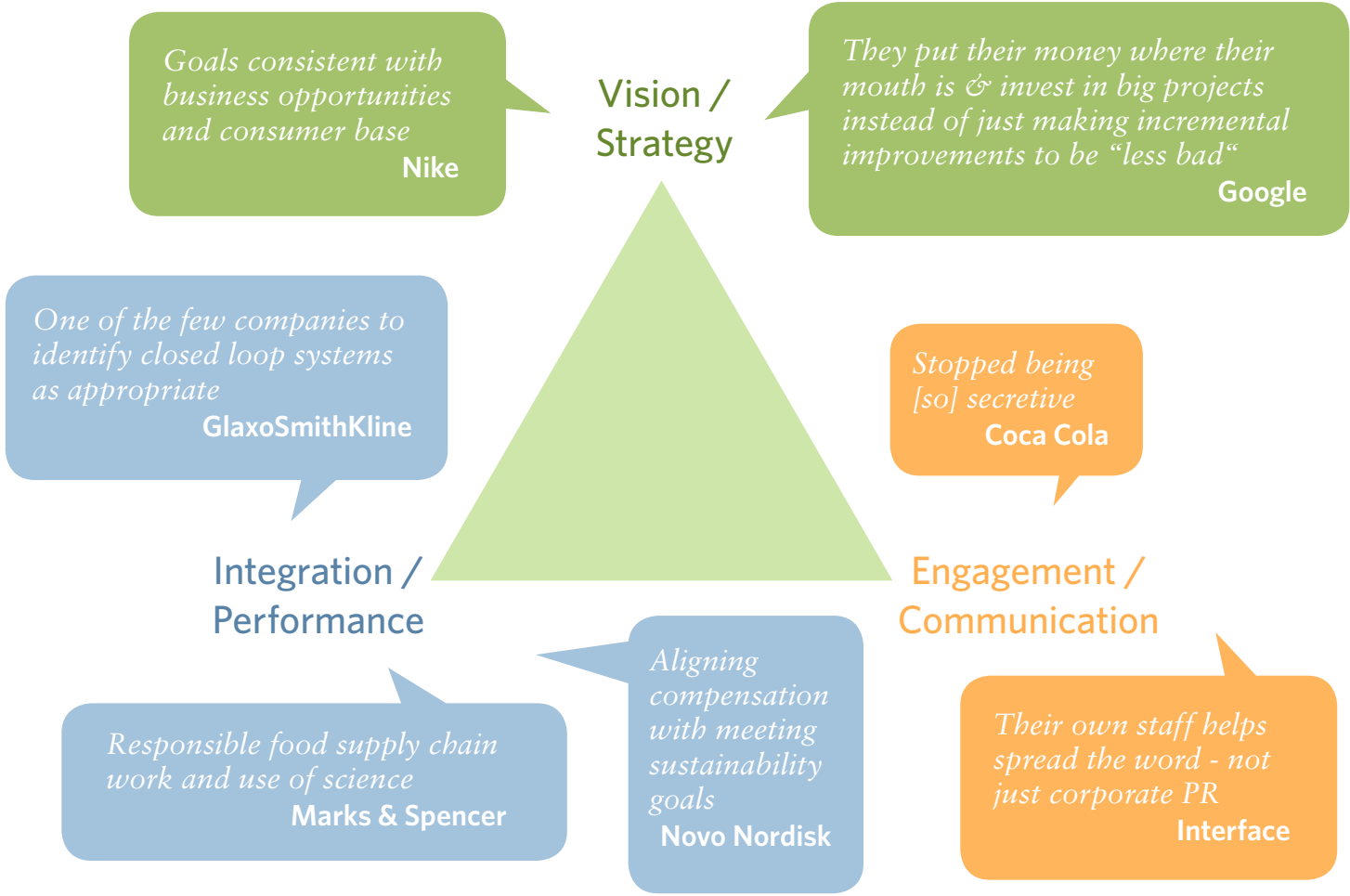
% of Total Mentions, All Respondents, 2012 - 2013



Question
 Why do you think [INSERT COMPANY #1 FROM ABOVE] is a leader in integrating sustainability into their business strategy?

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Experts identified a number of reasons why they consider other top companies sustainability leaders, reflecting the three points of the “leadership triangle”.



Question

Why do you think [INSERT COMPANY #1 FROM ABOVE] is a leader in integrating sustainability into their business strategy? Please enter up to two responses in the spaces provided.

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