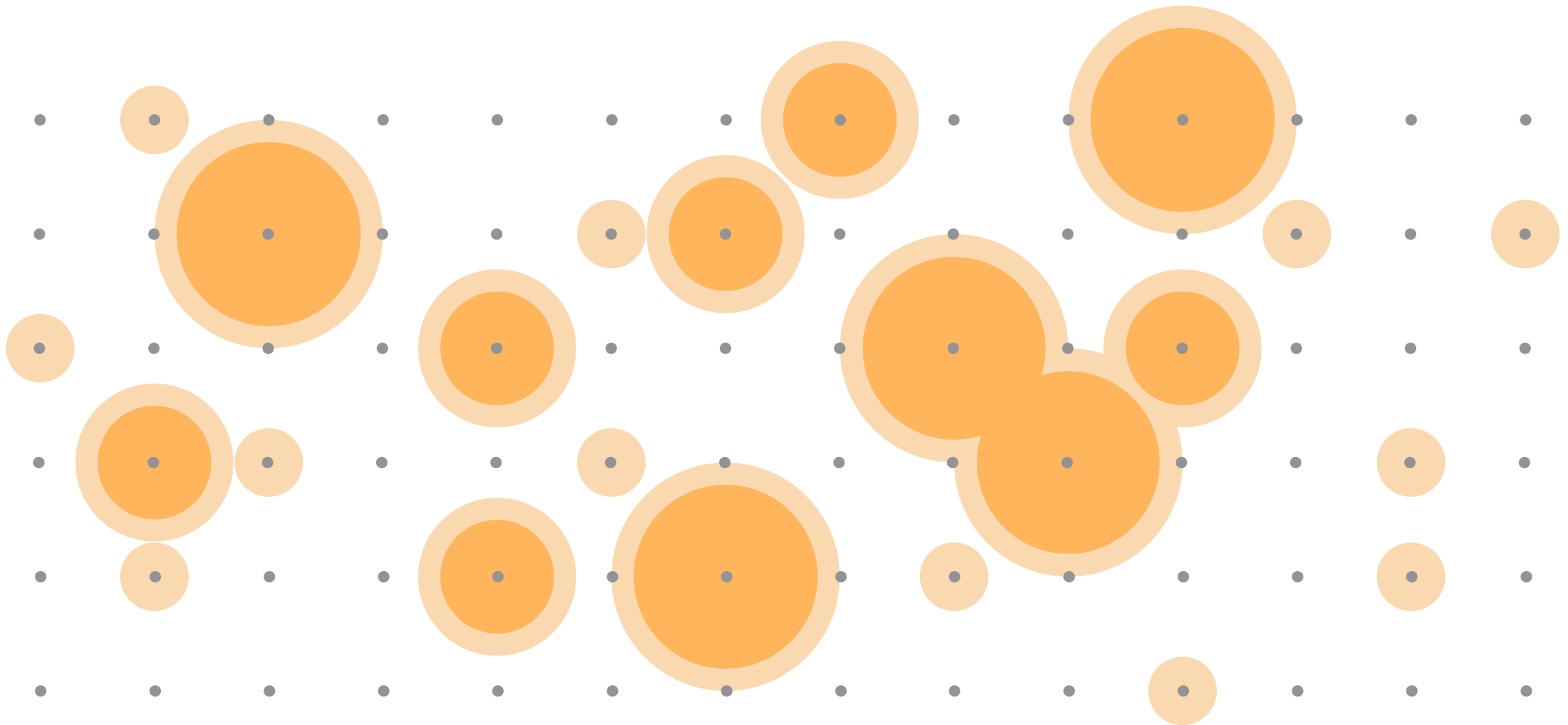


The 2013 Issues Survey

# *Challenges, Performance and Accountability*

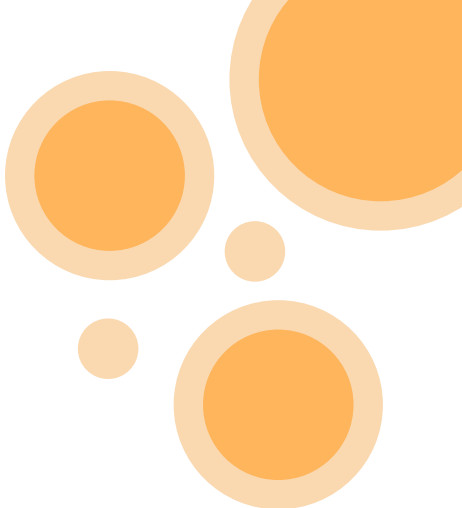
A GlobeScan/SustainAbility Survey



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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 publish around five reports 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

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In comparison to the 2011 edition of this survey, titled *Key Challenges and Industry Performance*, this year's results show a slight uptick in the level of urgency experts feel across top sustainability issues, as well as in their impressions of how well industry is managing the transition to sustainability. But, even while perceptions of performance have increased incrementally for nearly every sector (a first since 2000), the overall gap between urgency and performance remains significant.

For the first time in this survey series, experts were asked not only for their views on which issues are most urgent for particular industry sectors, but also which sectors are most accountable for reducing their impact on, or providing solutions for, each issue. By comparing these results against issue urgency, a series of sector-specific "accountability/urgency maps" were created, each of which provides an updated view on industry challenges and opportunities, and a unique input for materiality analyses, strategy setting and other processes.

This report includes a generalized version of these maps that aggregates ratings of urgency and accountability across all issues and highlights two distinct groups of industries: those facing high levels of both urgency and accountability on a number of fronts, versus those dealing with less overall urgency and accountability. For those in the second group, however, there is often still at least one or a subset of issues that stand out. For example, while the pharmaceutical industry's overall urgency and accountability scores are relatively low (see page 17), experts consider this industry extremely accountable for addressing the issue of access to medicines/healthcare.

As outlined in GlobeScan and SustainAbility's 2013 report *Changing Tack*, collaboration within and across industries is required to address the many challenges facing corporations and society at large. With this in mind, readers are encouraged to view the following findings as both a snapshot of where we are as well as a springboard for discussions that raise ambition and instigate enhanced collective action.



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## Survey methodology

<i>Demographics</i>	Government	NGO	Academic / Research	Corporate	Service / Media	Other	Total
Asia	5	20	42	32	12	2	113
Africa / Middle East	5	5	9	11	8	1	39
Europe	17	37	27	18	21	6	325
North America	16	29	59	59	44	12	219
Oceania	3	2	14	11	17	0	47
Latin America / Caribbean	7	17	27	18	21	6	96
DK/NA	7	9	8	8	4	7	43
<b>Total</b>	<b>60</b>	<b>119</b>	<b>243</b>	<b>238</b>	<b>179</b>	<b>43</b>	<b>882</b>

- 882 qualified sustainability experts completed the online questionnaire from September 25 to October 25, 2013.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 91 countries in Asia, Africa / Middle East, Europe, North America, Latin America / Caribbean, Australia / New Zealand, and comprise a highly-experienced respondent pool:
  - 67 percent have more than ten years of experience working on sustainability issues.
  - 26 percent have five to ten years of experience.
  - 7 percent have three to four years of experience.
  - Respondents with less than three years of sustainability experience have been excluded from the results.

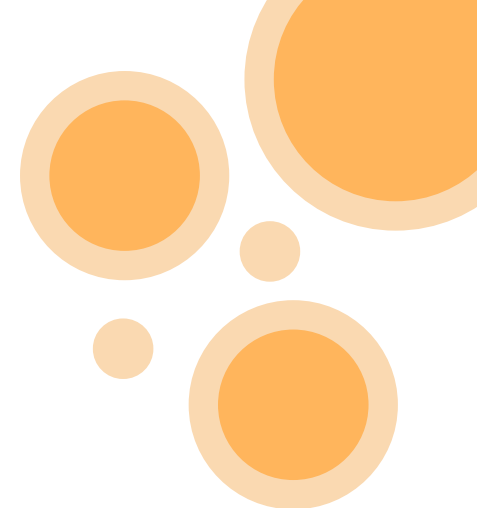
### *Note to Readers*

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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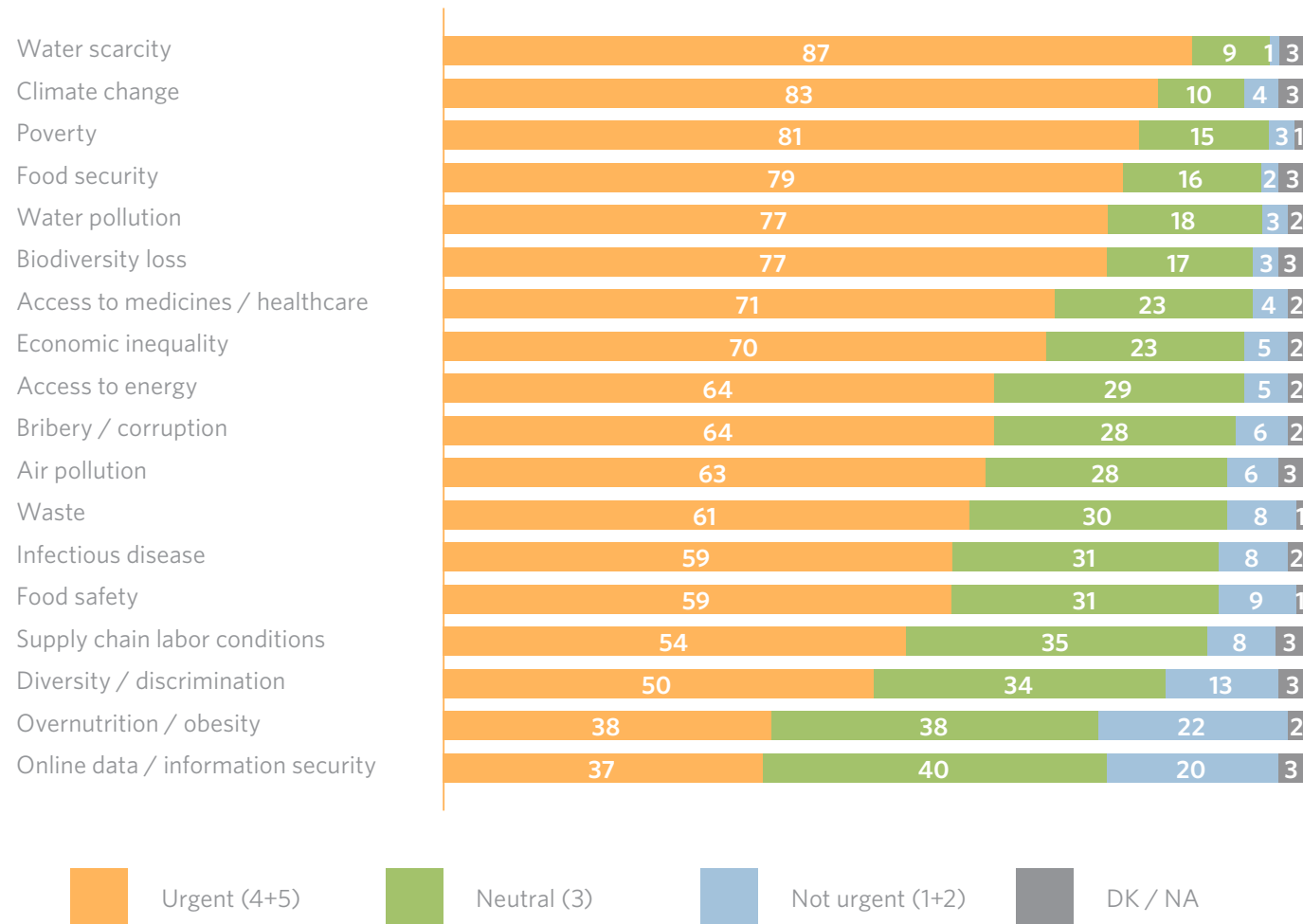
# Key findings

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- Experts rate water scarcity, climate change and poverty as society’s most urgent challenges, with water and climate swapping places since 2011.
- Ratings of the urgency of top issues have rebounded, following gradual decline since 2009.
- Water scarcity is of top concern for Europeans and those in emerging markets. Concern over climate change in emerging markets trails that in North America and Europe. Notably, North Americans’ concern about climate change trumps that of other geographies.
- Experts working in government see water scarcity and food security as more urgent than those in other sectors. Conversely, they see poverty as less urgent than others surveyed.
- No sector is managing the transition to sustainable development effectively. However, for the first time since 2000, experts see nearly all sectors improving incrementally.
- When considering top sustainability issues, experts see agriculture/food & beverage, oil / gas and chemical sectors as the most accountable. Of these, agriculture/food & beverage is best ranked in terms of “sustainability performance.”
- Comparing the “urgency” and “accountability” of sustainability issues by industry may help identify areas for cross-sector collaboration.



*Experts rank water scarcity, climate change and poverty as society's most urgent challenges. The level of urgency has climbed for nearly every issue since 2011.*



*Question*

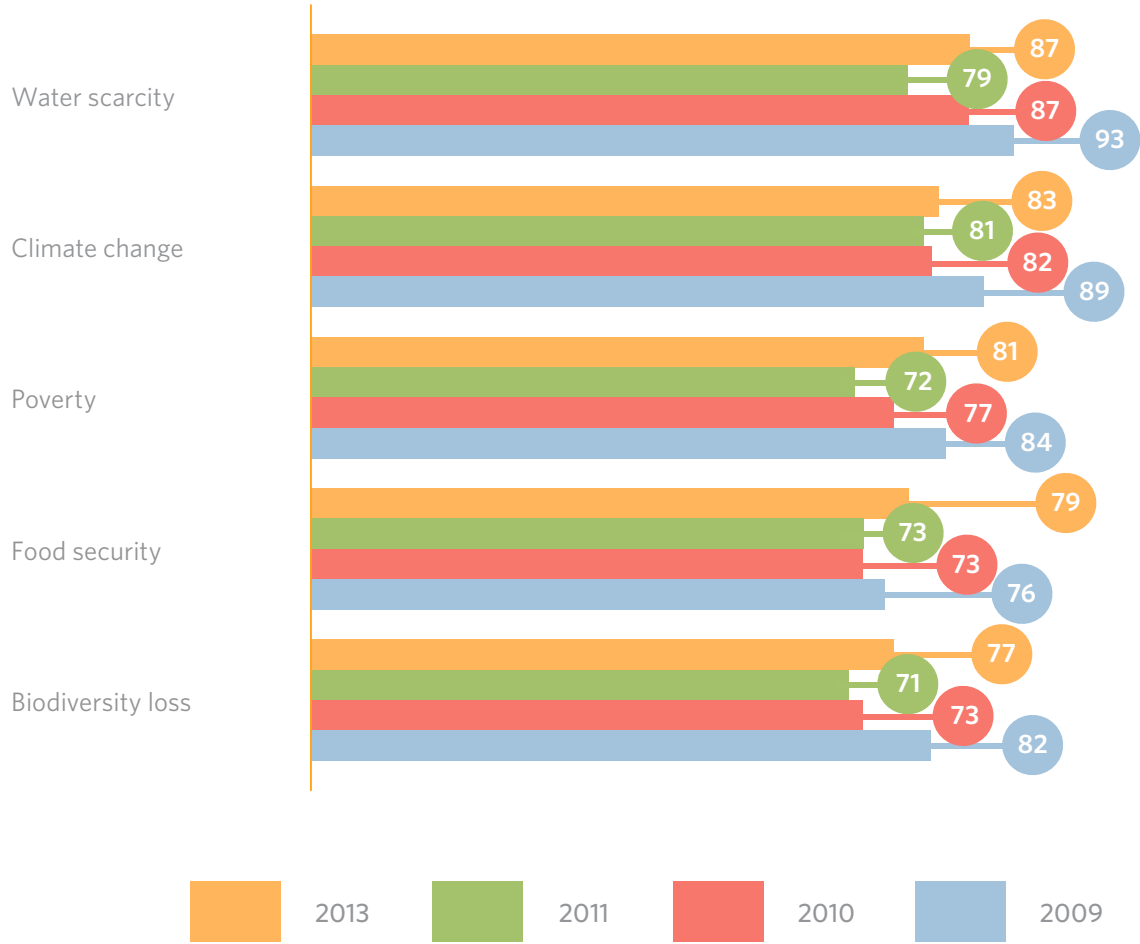
Considering society's numerous sustainable development challenges, please rate the urgency of each of the following:

Please use a scale of 1 to 5 where 1 means "not urgent at all" and 5 means "very urgent."



*After declining since 2009, urgency has rebounded across top issues.*

“Urgent” (4+5), 2009-2013



*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."

*Experts from government see water scarcity and food security as most urgent, while placing less urgency on poverty than other sectors.*

“Urgent” (4+5), by Sector

	Government	NGO	Academic / Research	Corporate	Service / Media	Other
Water scarcity	92	86	90	86	87	85
Climate change	82	87	84	82	83	79
Poverty	72	87	83	81	80	79
Food security	88	80	81	82	74	82
Water pollution	80	85	77	76	73	82
Biodiversity loss	87	84	81	71	79	67

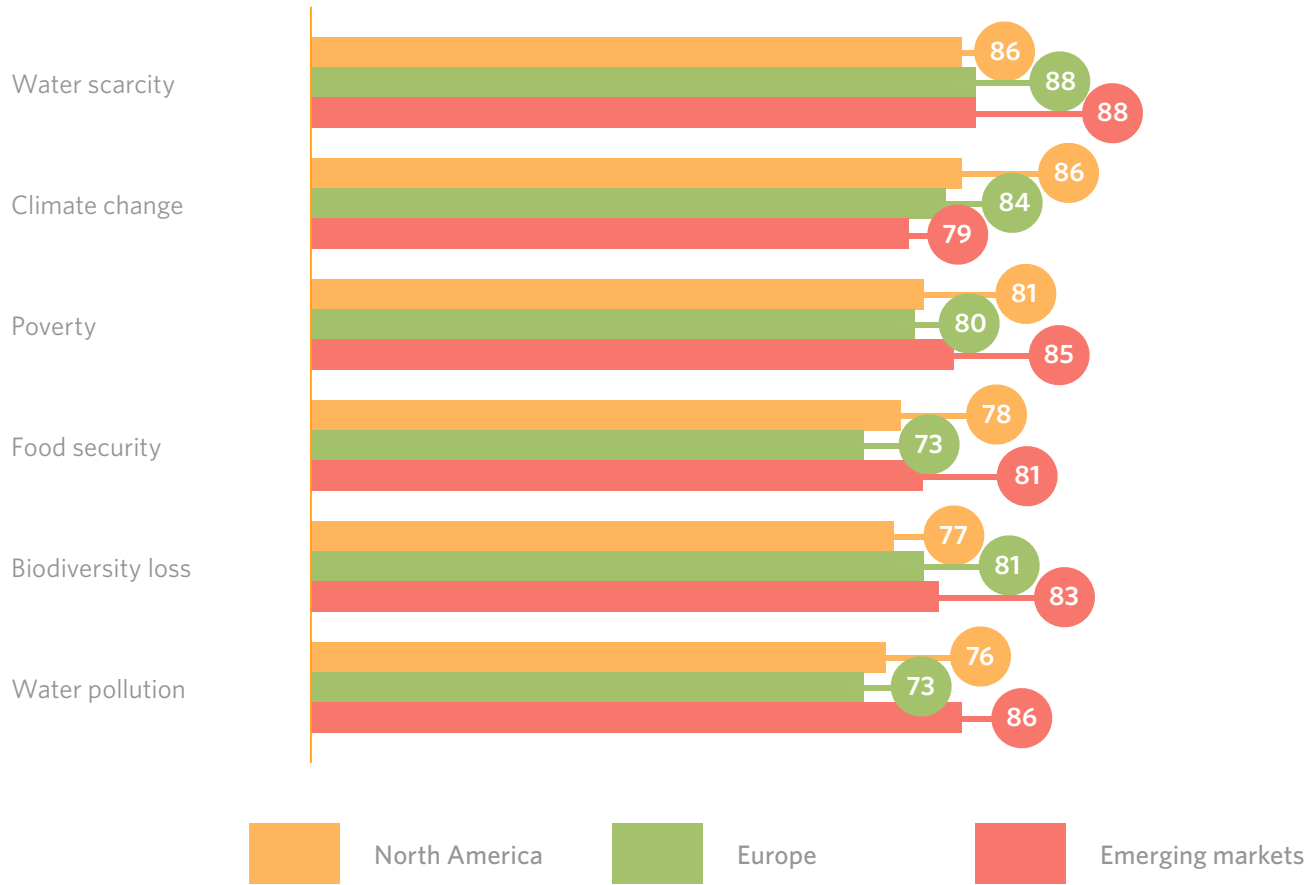
*Question*

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.”

*Water pollution, poverty and water scarcity are top concerns in emerging markets; climate concerns trail those in North America and Europe. Notably, North Americans are most concerned about climate change.*

“Urgent” (4+5), by Region



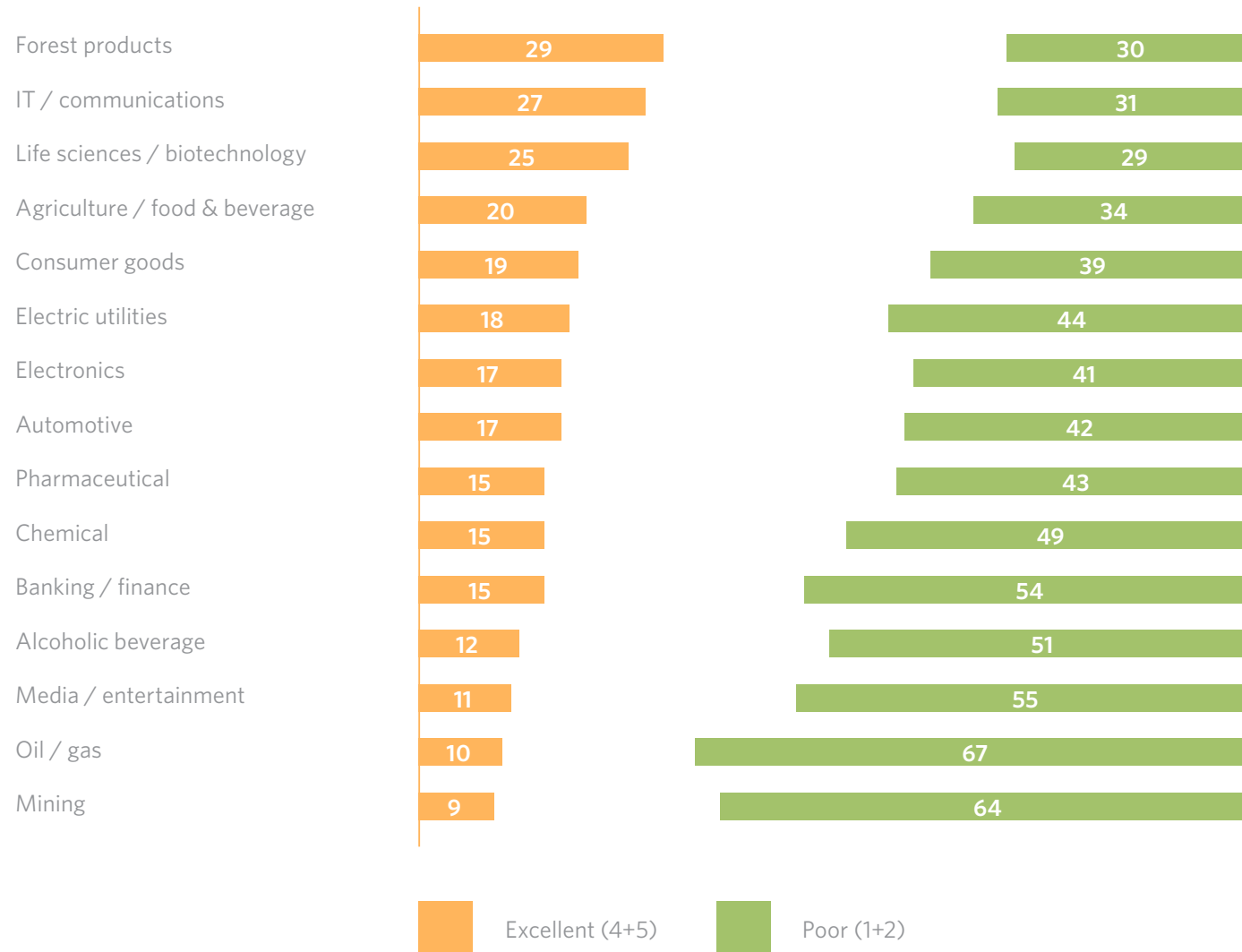
*Question*

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.”



## Managing the transition to sustainable development continues to be a challenge across industries.



### 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 is "poor" and 5 is "excellent."

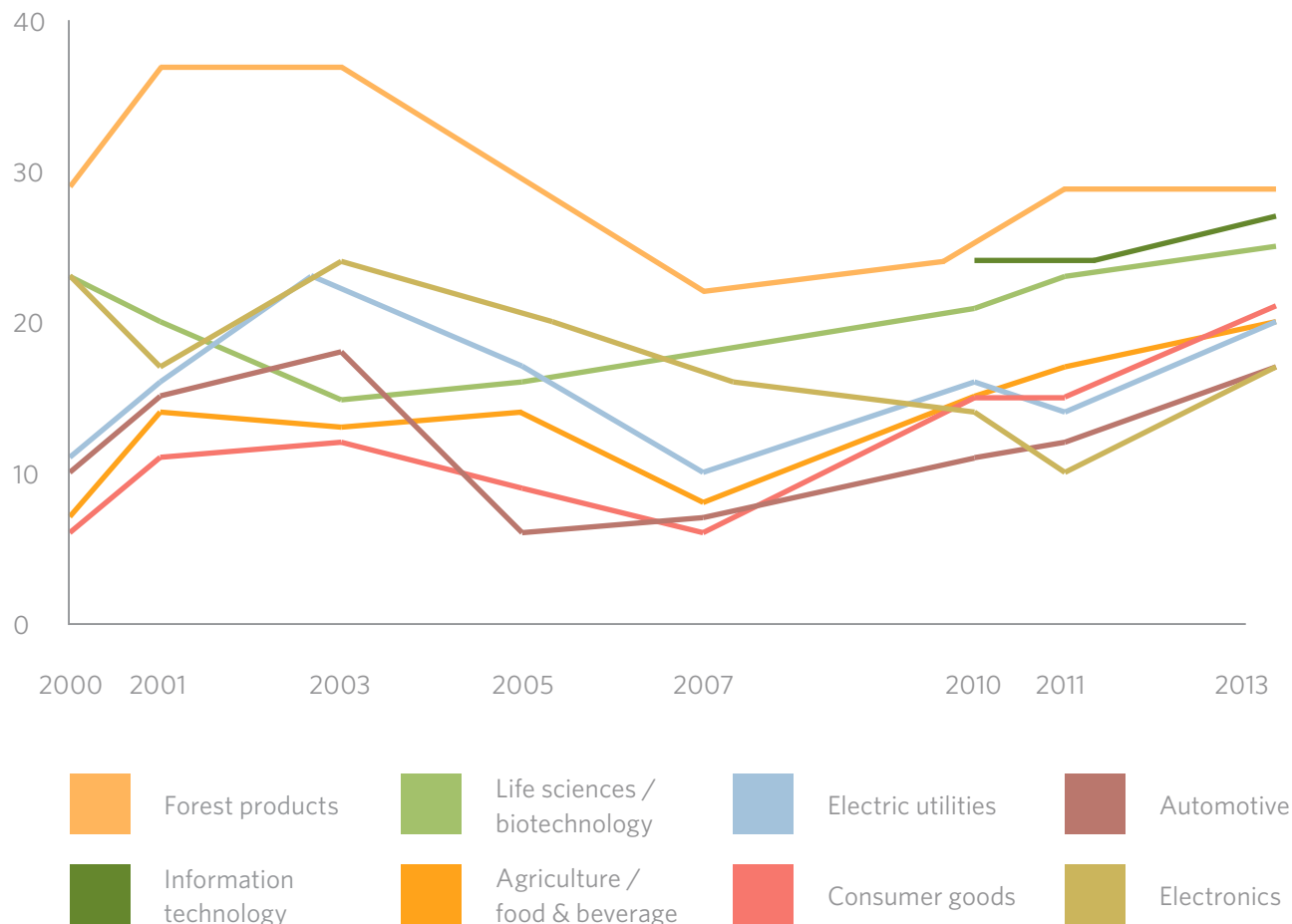
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*Despite challenges, all sectors (except forest products) show some improvement in score – a notable “first” since 2000.*

“Excellent” (4+5), 2000-2013



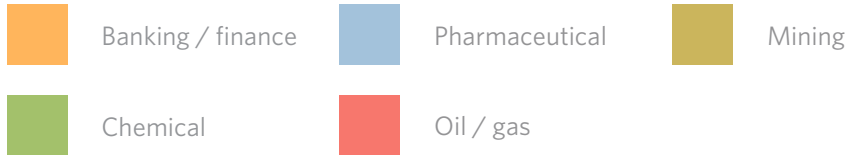
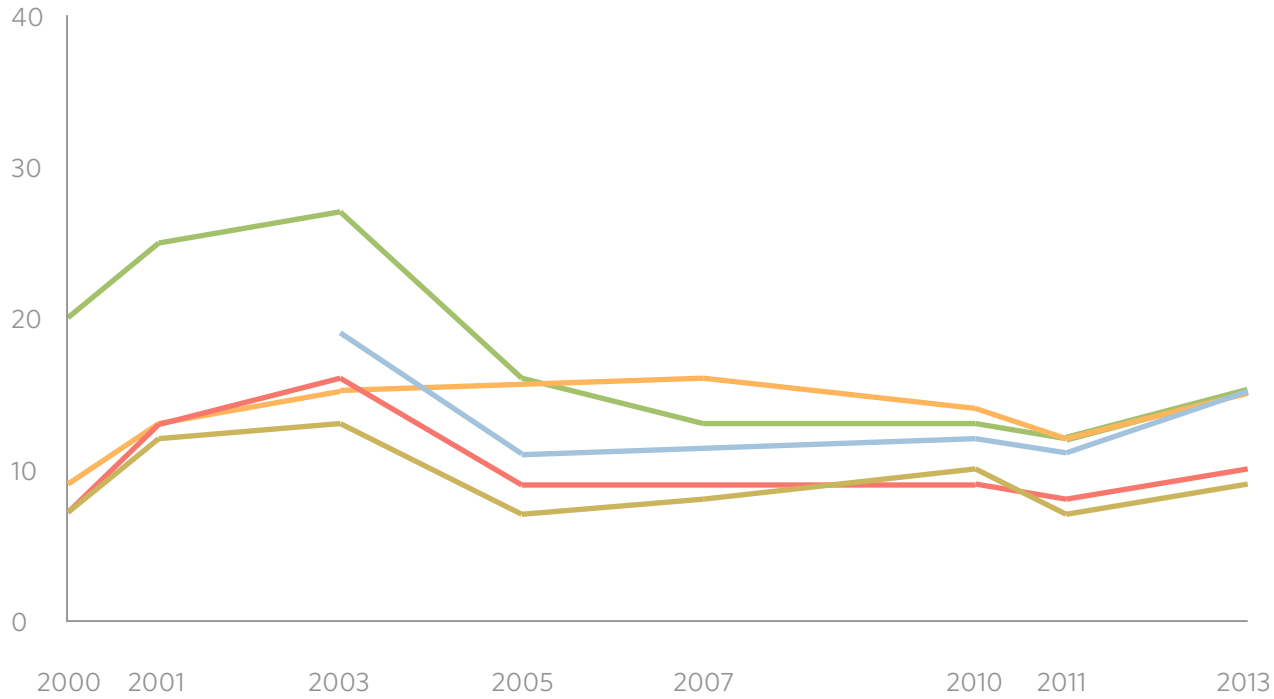
*Question*

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 is “poor” and 5 is “excellent.”

*Even low-ranked industries show a slight improvement. After stagnant or declining performance ratings in recent years, the following sectors have increased marginally.*

“Excellent” (4+5), 2000-2013



*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 is "poor" and 5 is "excellent."

## Top five issues: most accountable industries

Across the most urgent issues, agriculture / food & beverage, oil & gas and chemical industries are seen as the most accountable. Their perceived low performance in managing the transition to sustainable development points to opportunities for leadership and collaboration.

Issue	Industry 1	Industry 2	Industry 3
<b>Water scarcity</b>	Agriculture / food & beverage - 87%	Oil / gas - 42%	Chemical - 36%
<b>Climate change</b>	Oil / gas - 86%	Electric utilities - 53%	Automotive - 52%
<b>Poverty</b>	Banking / finance - 69%	Agriculture / food & beverage - 61%	Consumer goods - 36%
<b>Food security</b>	Agriculture / food & beverage - 93%	Consumer goods - 48%	Banking / finance - 32%
<b>Biodiversity loss</b>	Agriculture / food & beverage - 81%	Oil / gas - 67%	Chemical - 40%
<b>Water pollution</b>	Chemical - 75%	Agriculture / food & beverage - 72%	Oil / gas - 71%

### Question

For the issue of [ ], please select up to three of the following industry sectors that should be most accountable for reducing their direct contribution to the issue and/or providing solutions to resolve it.

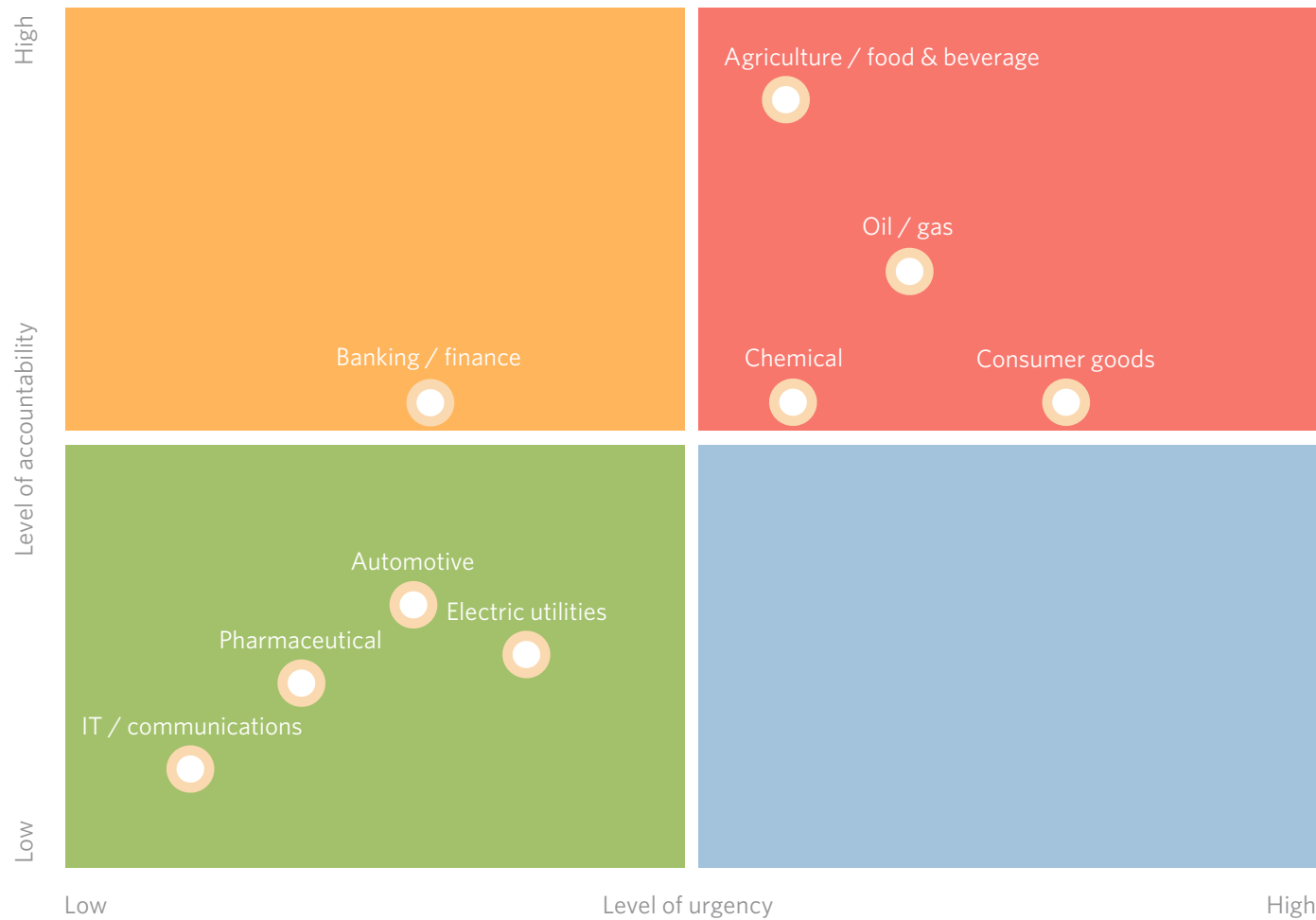
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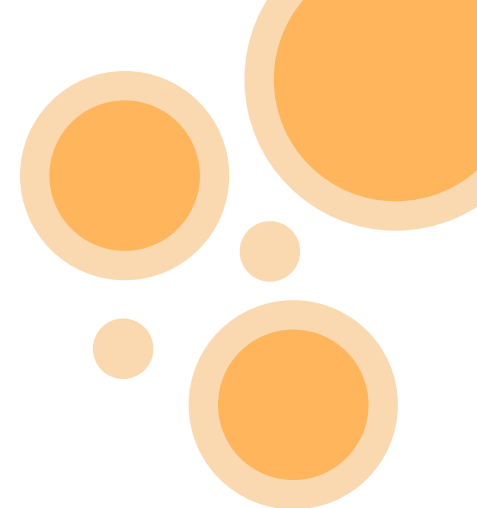
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# Urgency of issues versus level of accountability

Looking across all issue areas, generalized levels of urgency and accountability per industry point to two distinct groups: those facing high urgency with high accountability, and those facing less urgency and less accountability. Industry-specific analyses using survey data reveal more nuanced findings and sector-specific implications.





# For more information, contact:

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For more information, including key sector-specific findings derived from this research, contact:



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