

GlobeScan / SustainAbility Survey **2021 Sustainability Leaders**



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Introduction

This year marks the 25th edition of the GlobeScan / SustainAbility Leaders Survey. Since 1997, we have been tracking sustainability experts' views on the urgency of sustainability issues and asking them to identify the companies, NGOs, and governments perceived to be leaders in advancing the sustainable development agenda.

This year's survey comes at a time when many feel there is new momentum around sustainable development. As critical milestones for progress on the SDGs and the Paris Agreement move alarmingly closer, forcing us to acknowledge the urgency of action, sustainability is being mainstreamed into more and more aspects of business and everyday life. The private sector's commitment is reflected by the ever-growing number of companies making commitments on climate, biodiversity, diversity, equity, and inclusion, and other issues. Governments are aligning policies with ambitions for inclusive, green growth. NGOs and academics are stressing the myriad urgent threats globally and calling for transformational change in response. With two make-or-break global conferences this year on climate and biodiversity and the post-pandemic recovery accelerating, 2021 presents a fascinating moment for the Leaders Survey to dive into what is shifting sustainability leadership trends now.

Our 2021 survey was completed between April 29 and June 16 by almost 700 sustainability experts from over 70 countries. We are pleased to have captured the most diverse regional Leaders Survey response ever, thanks especially to increased representation from experts in Latin America and Asia-Pacific. The 2021 survey again asks which organizations our expert panel perceives as the leading NGOs, companies, and governments in sustainability terms; as in prior years, we asked respondents for their views on the most urgent sustainable development issues. Finally, as in 2020, we sampled panellist perspectives on how they expect the COVID-19 pandemic to influence sustainable development priorities in the coming years.

Panellists' responses in 2021 show the gap narrowing among corporate leaders. While Unilever and Patagonia (in that order) are again mentioned as leading companies by the most respondents, their separation from other

companies recognized as leaders has shrunk. Natura &Co enjoys the greatest uplift among the leaders this year, and respondents list the most diverse list of regionally specific sustainability leaders ever. We find this exciting, as it hints that sustainability leadership among companies is becoming more common and more competitive.

When asked to compare the relative performance of different types of institutions in terms of advancing the sustainable development agenda, NGOs are again perceived to be doing the most by survey respondents. Among NGOs, World Wildlife Fund repeats as the most widely recognized leader. In the institutional ranking, the perception of institutional investors as leaders continue to trend up, while national governments are again seen as doing the least on sustainable development. When asked which governments are doing best, the panel points to northern European countries more than others.

Even with vaccines reaching more people, the COVID-19 pandemic persists. But one encouraging finding in this year's survey is a huge shift in the percentage of panellists who believe that COVID-19 will make sustainability a lower priority. While 49 percent of experts took that position in 2020, only 24 percent feel that way now.

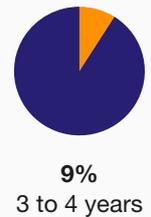
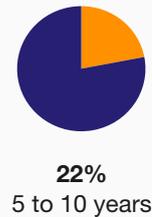
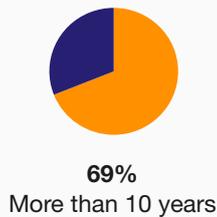
There is no question that this 25th edition of the GlobeScan / SustainAbility Leaders Survey continues to underscore how significant sustainable development challenges remain – they are, in fact, more urgent than when the survey began. Still, we remain optimistic, trusting that NGOs, governments, companies, and others can use the information in this survey and other resources to deliver what is expected and needed of sustainability leaders in time to address planetary challenges from climate to equity and create the just and sustainable society we need.

Survey Methodology

Six hundred and ninety-five qualified sustainability experts completed the online questionnaire from April 29 to June 16, 2021. For the first time, the survey was offered to respondents in Chinese, French, Portuguese, and Spanish, in addition to English.

Experience

Respondents have the following experience working on sustainability issues:



Geography

Experts surveyed span 72 countries in the following regions:



Sectors

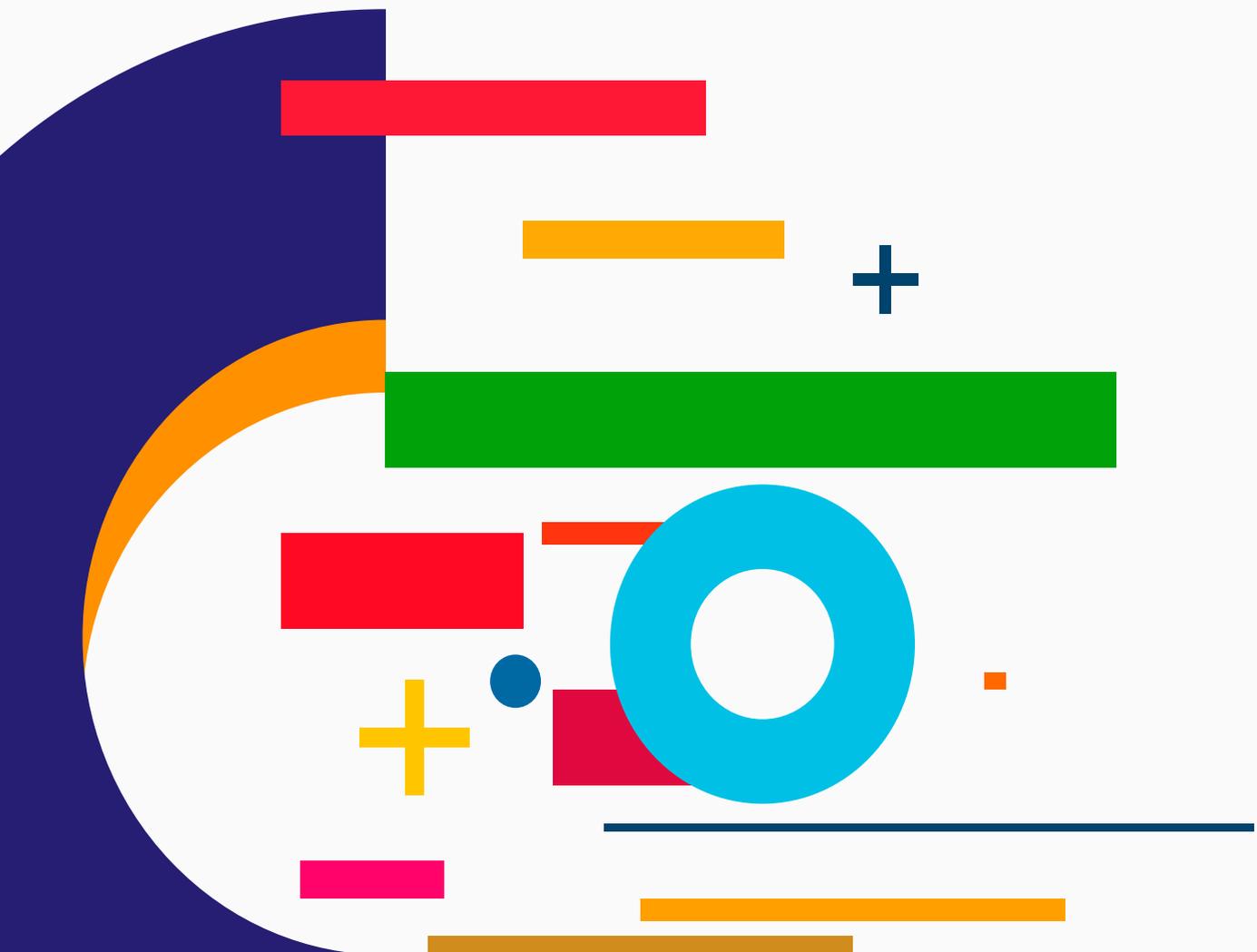
Respondents were drawn from the following sectors:



Key Findings

- ▶ **Concern about almost all sustainability challenges continues to intensify.** For the second year in a row, experts rate most issues as increasingly urgent. While concern for climate change remains stable, it also continues to be perceived as the most pressing issue. Other issues ranking high and viewed as increasing in urgency over the past five years include biodiversity loss, water scarcity, poverty, and water pollution. The issues that have increased the most in perceived urgency over the past year include access to energy, food security, and diversity and discrimination.
- ▶ **NGOs continue to outperform other institutional actors in terms of perceived contribution to advancing sustainable development priorities.** When asked to rate different institutional actors on their contribution to progress on sustainable development, over six in ten experts say NGOs perform best. Academia, citizen movements, the UN, and multi-sectoral partnerships are also seen more positively than negatively. Other actors' performance, including national and local governments, the private sector, institutional investors, and international financial institutions, is viewed mostly negatively, although the perception of efforts of institutional investors and the private sector improved compared to last year.
- ▶ **Northern European governments dominate positive perceptions of national sustainability leadership.** When asked which countries are leading on sustainable development, experts name mostly northern European governments, including those of Germany, Sweden, Denmark, Norway, the UK, the Netherlands, and Finland. Costa Rica continues to be the only Latin American country represented among the top-ranked nations and is tied with New Zealand in sixth place.
- ▶ **World Wildlife Fund remains the most widely recognized NGO** for its contribution to sustainable development, while Greenpeace continues to be the second-most recognized. Professionals in the NGO and corporate sectors and those based in Asia-Pacific and Europe tend to be more likely to see World Wildlife Fund as a sustainability leader than respondents from other sectors and regions.
- ▶ **The top tier corporate sustainability leaders remain consistent, but some new entrants are recognized.** The same top ten companies are cited as leaders in 2021 as in 2020, including, in order, Unilever, Patagonia, Natura &Co, IKEA, Interface, Danone, Microsoft, Nestlé, Tesla, and Ørsted, with Natura &Co pushing ahead to secure the third spot in this year's ranking. Companies filling out the top 15 include Google, Schneider Electric, Walmart, Kering, and Suzano.
- ▶ **Sustainable business models and strategy are the strongest drivers of recognized leadership.** In 2021, experts say putting sustainability at the very core of the business model is the most important reason they recognize a company as a leader.
- ▶ **Corporate sustainability leadership has become more diverse regionally.** When asked specifically about corporate leaders headquartered in their own regions, experts in Europe (Unilever, IKEA), Latin America (Natura &Co), and North America (Patagonia) identify clear leaders, whereas experts in Asia-Pacific and Africa / Middle East cite a greater variety of leading companies, with many making this year's list for the first time.
- ▶ **Experts no longer believe so strongly that the COVID-19 pandemic will slow sustainability progress.** In 2020, almost half of sustainability professionals (49%) predicted a de-prioritization of the sustainability agenda over the coming decade as a result of the coronavirus – a proportion that has decreased to just one-quarter (24%). Nearly four in ten experts (38%) now believe that increasing poverty and inequality will be one of the most likely effects of the pandemic, while almost three in ten think one legacy of the pandemic will be more attention being given to the environment.

Urgency of Sustainable Development Challenges

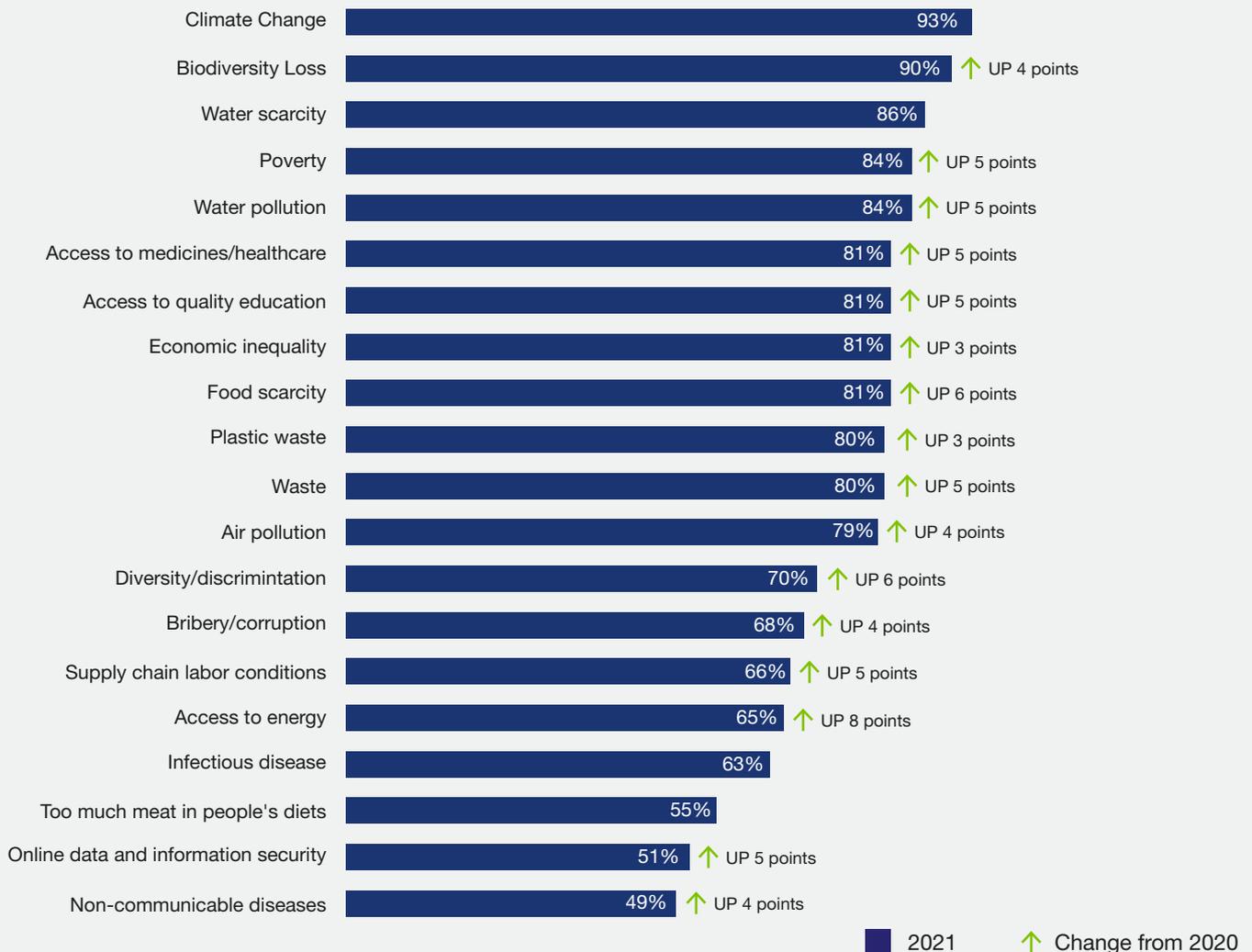


Growing Urgency of Sustainable Development Challenges

The perceived urgency of almost all sustainable development challenges tracked in this survey increased since last year, highlighting the ongoing urgency of the broad sustainability agenda in the context of the pandemic.



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), 2020–2021

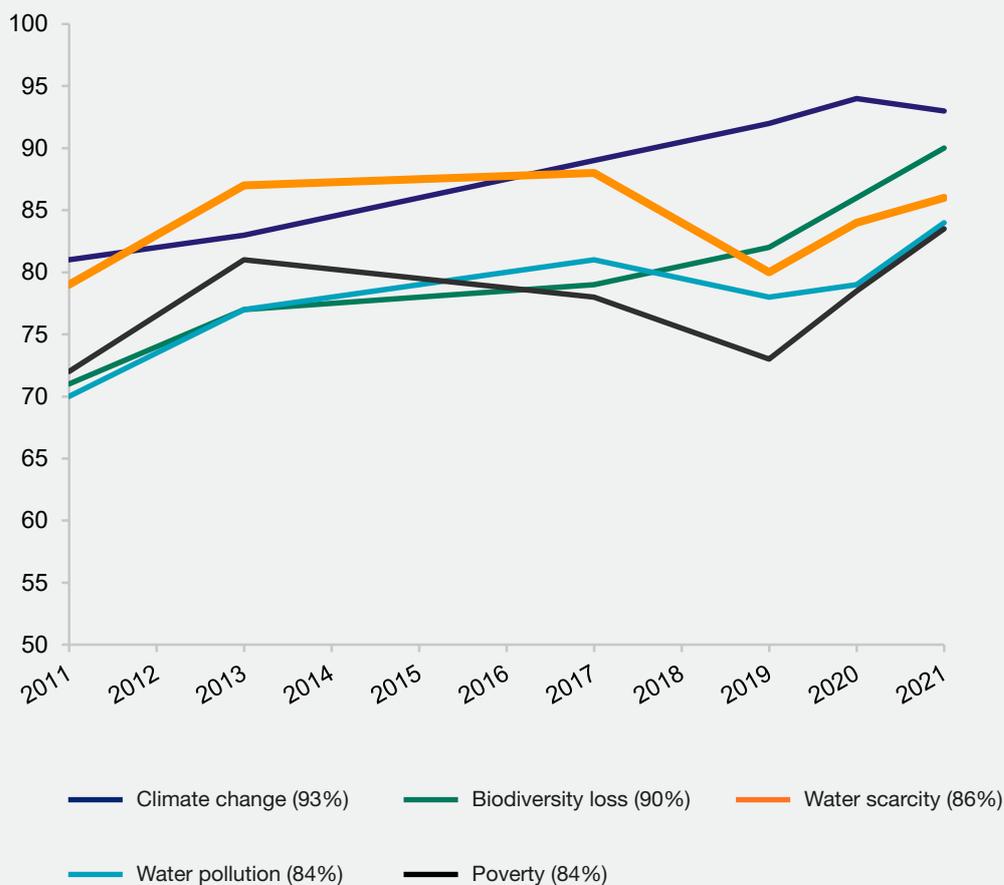
Urgency of Top Sustainable Development Challenges Trends Upward

The perceived urgency of the top five challenges has increased substantially over the past decade, especially for biodiversity. This year climate change has slightly decreased in perceived urgency, but overall it retains the top spot as the most urgent challenge according to sustainability experts.



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), 2011–2021

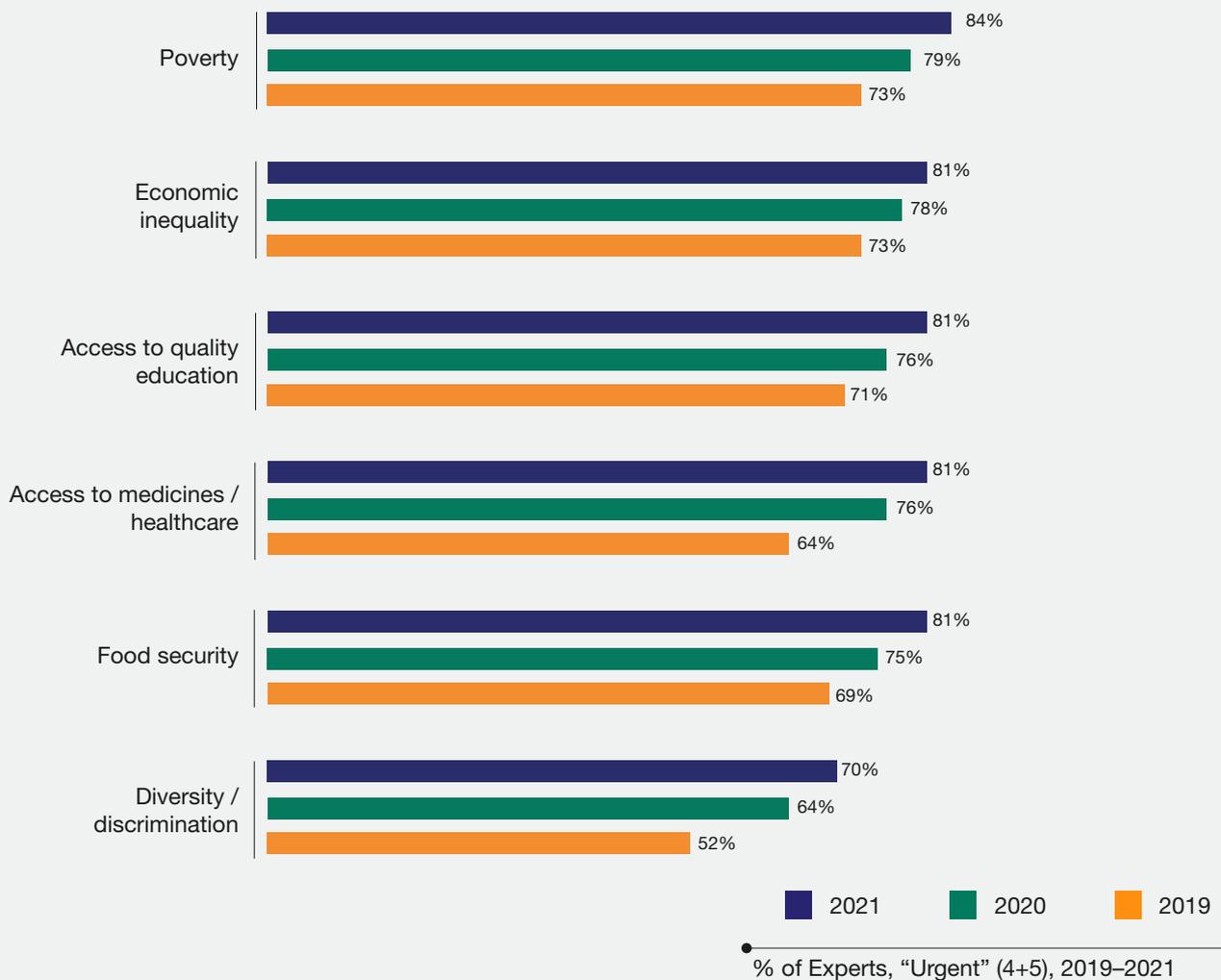
Urgency of Social Challenges is Increasing

In the context of the pandemic and its accompanying challenges of economic hardship and unequal impact, experts are increasingly seeing social and economic development challenges as urgent.



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."*



Institutional Performance on Sustainable Development



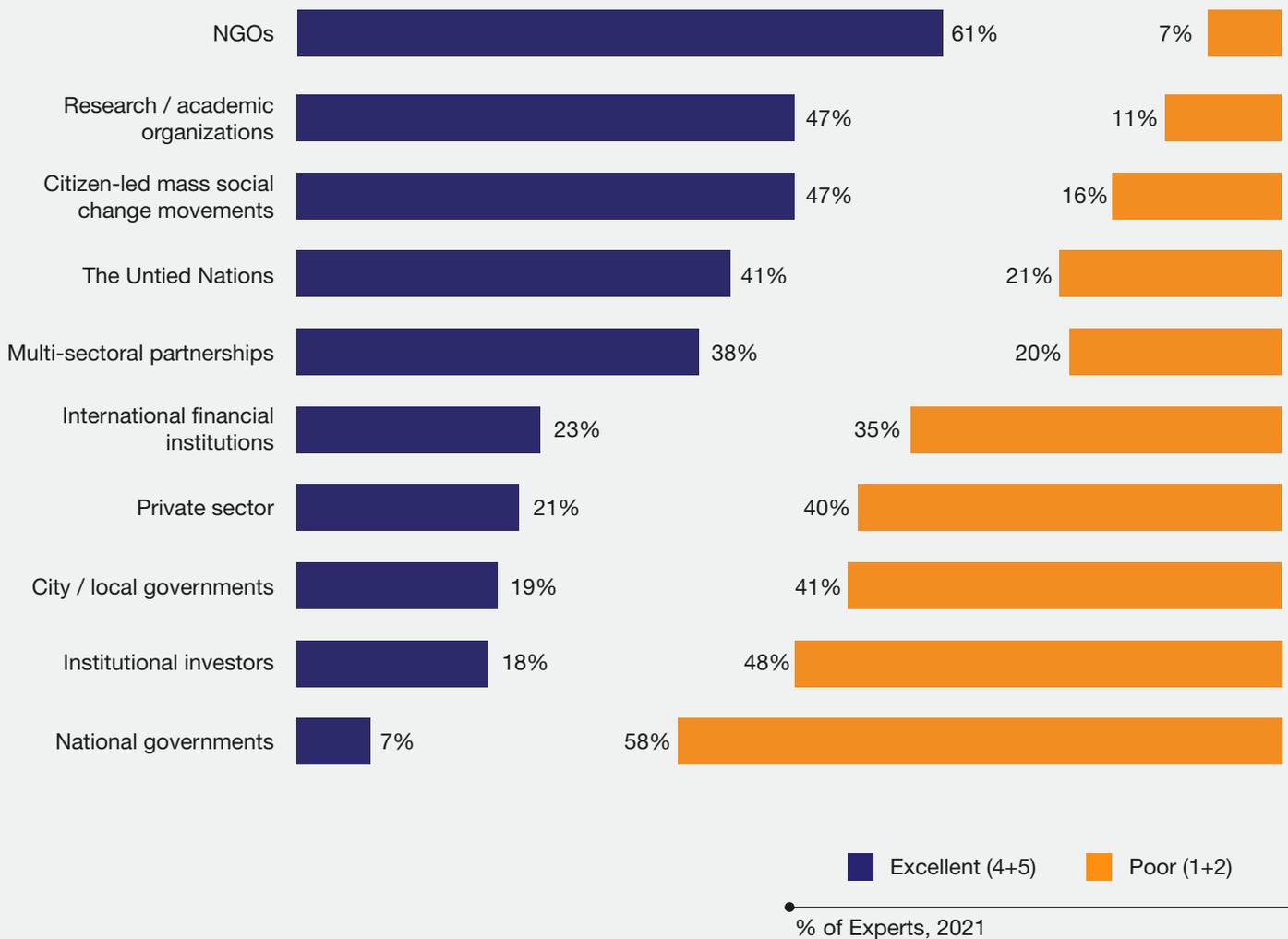
NGOs, Academia, and Citizen Movements Demonstrate Strongest Leadership

National governments are overwhelmingly seen by experts as lacking in leadership on sustainable development, with a majority saying they are doing a poor job.



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?
 Please use a scale where 1 is “poor” and 5 is “excellent.”



Positive Assessment of NGOs, Private Sector, and Institutional Investors Strengthens

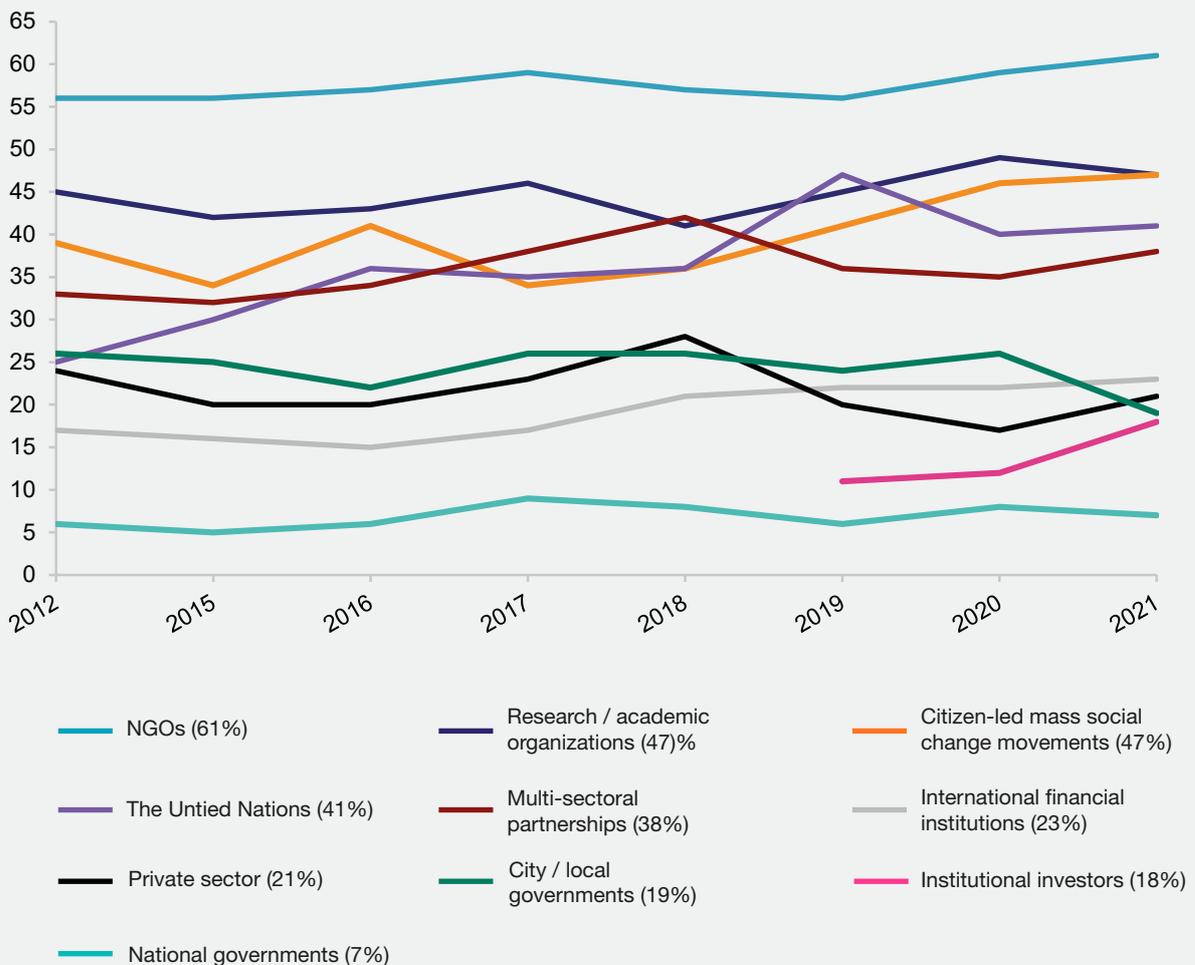
Positive views of NGOs, multi-sectoral partnerships, the private sector, and institutional investors are trending up slightly, while positive assessments of local governments are down.



Question

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on sustainable development since the 1992 Earth Summit in Rio?

Please use a scale where 1 is “poor” and 5 is “excellent.”



● % of Experts, “Excellent” (4+5), 2012–2021

Government Leaders

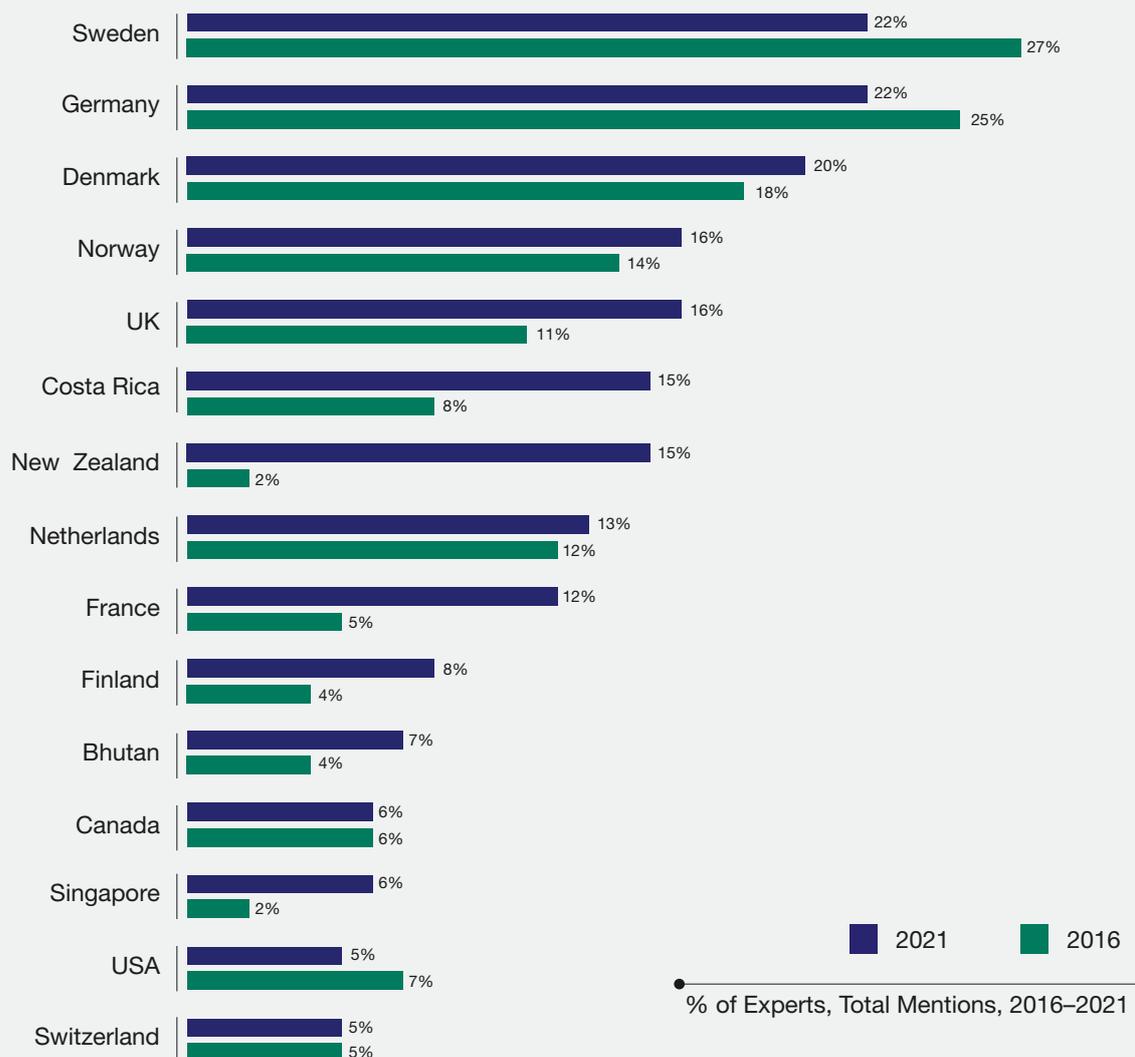


Sweden and Germany Top-Ranked Among Governments

While Sweden and Germany continue to be viewed as leading among governments, more experts are naming countries like the UK, Costa Rica, New Zealand, France, Finland, Bhutan, and Singapore.



What specific national governments do you think are leaders in advancing sustainable development?
 Please enter a maximum of three countries in the spaces provided.



NGO Leaders

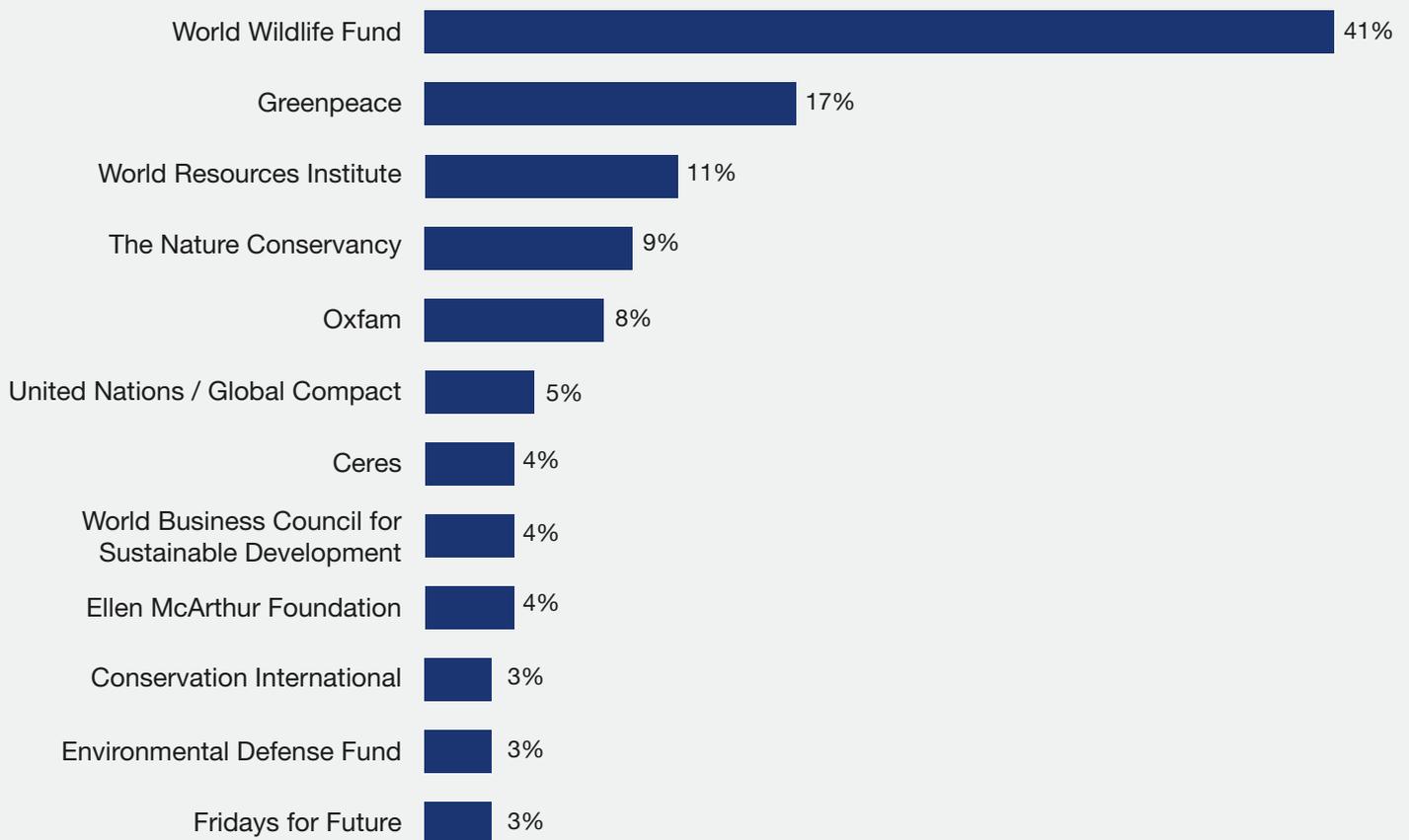


World Wildlife Fund Dominates Recognition for Leadership

Four in ten sustainability experts recognize World Wildlife Fund as an NGO leader in sustainable development. Although the selection of most-recognized NGOs has remained almost the same compared to last year, Greta Thunberg’s climate-focused youth movement, Fridays for Future (School Strike for Climate), appeared on this year’s list for the first time.



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



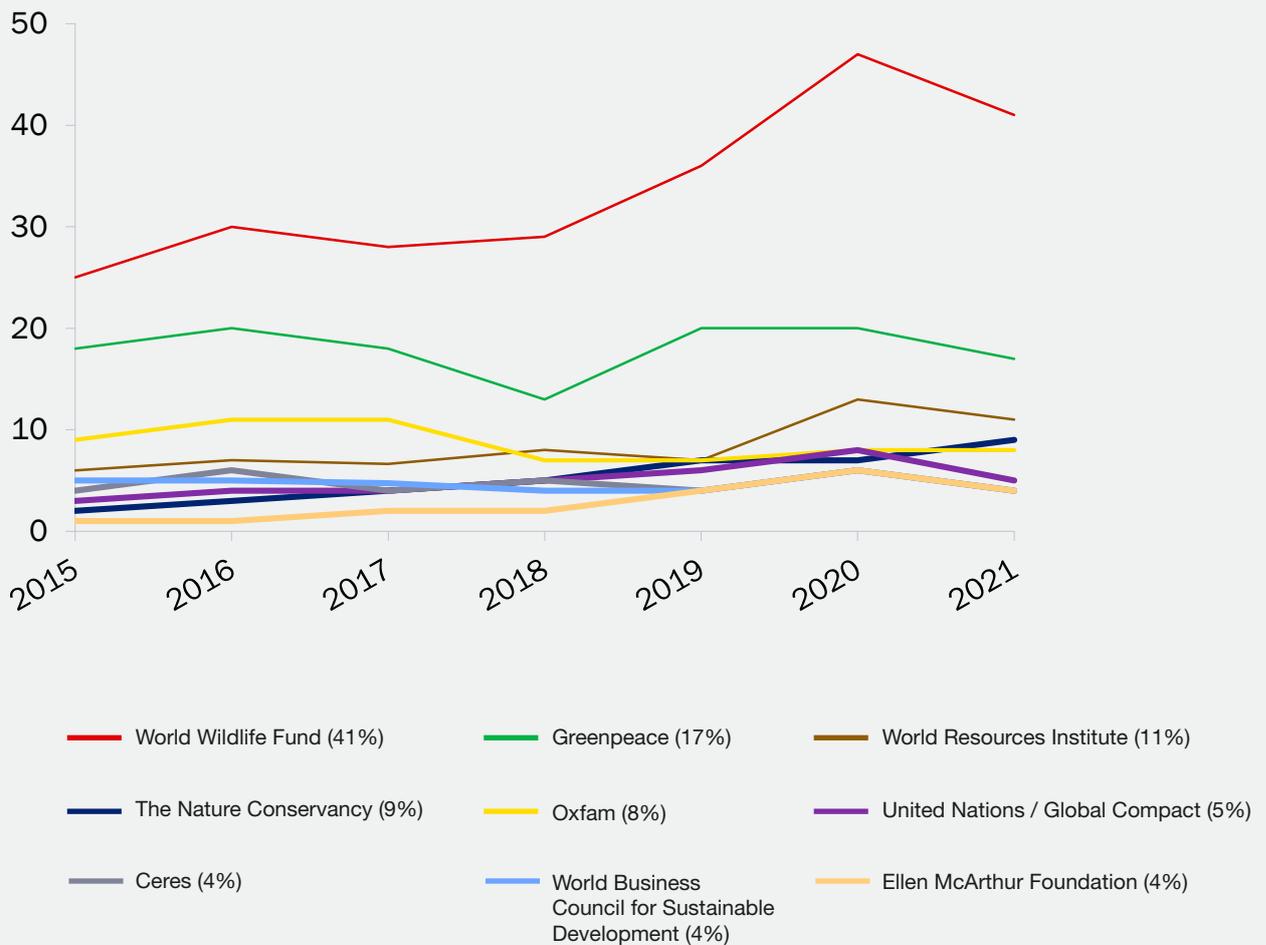
● % of Experts, Unprompted, Total Mentions, 2021

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 two years.



What 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, 2015–2021

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 NGO and corporate sectors and those based in Asia-Pacific and Europe.



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

	Government	NGO	Academic / research	Corporate	Service / media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
World Wildlife Fund	20%	53%	33%	47%	35%	29%	46%	51%	34%	34%
Greenpeace	8%	15%	20%	18%	16%	12%	17%	24%	18%	8%
World Resources Institute	8%	12%	7%	14%	11%	5%	10%	12%	9%	17%
The Nature Conservancy	16%	12%	6%	6%	11%	5%	7%	3%	13%	17%
Oxfam	4%	4%	12%	7%	10%	10%	5%	14%	6%	6%
United Nations / Global Compact	0%	4%	5%	8%	4%	7%	4%	6%	6%	3%
Ellen McArthur Foundation	0%	1%	5%	8%	4%	0%	2%	7%	3%	7%
Ceres	0%	2%	5%	5%	5%	0%	3%	2%	1%	12%
World Business Council for Sustainable Development	4%	2%	2%	5%	4%	2%	3%	3%	3%	5%
Environmental Defense Fund	4%	5%	4%	2%	4%	2%	1%	1%	1%	11%
Fridays for Future	0%	5%	5%	2%	4%	0%	2%	7%	1%	3%
Conservation International	0%	8%	3%	2%	3%	2%	4%	2%	3%	6%

• % of Experts, by Sector and Region, Unprompted, Total Mentions, 2021

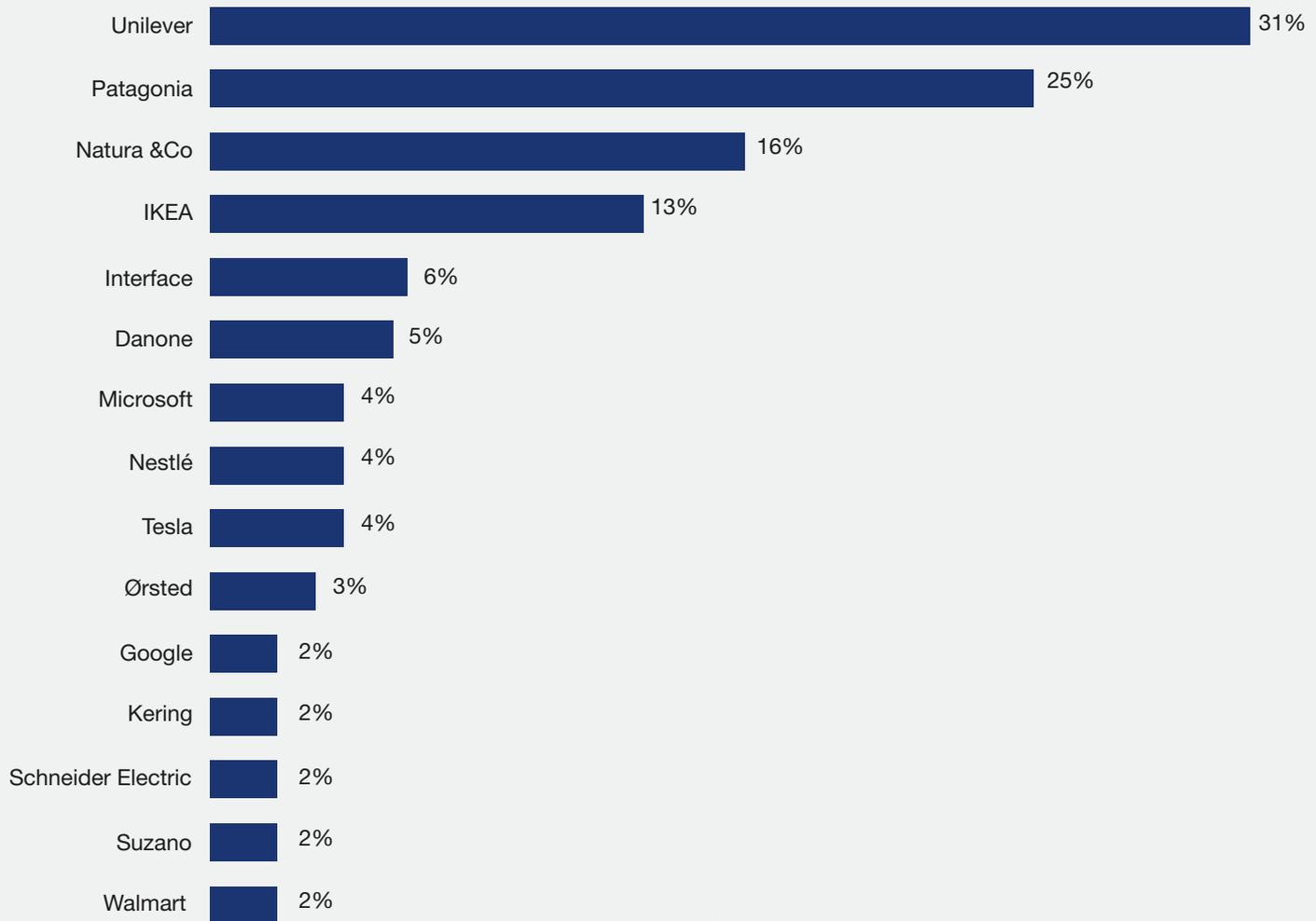
Unilever, Patagonia, Natura &Co, and IKEA Are the Companies Most Recognized For Their Sustainability Leadership

Natura &Co has overtaken IKEA and Interface to enter the top three companies most recognized by experts for their sustainability leadership. While reordered, the companies in the top ten remain the same as in 2020.



Question

What 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.



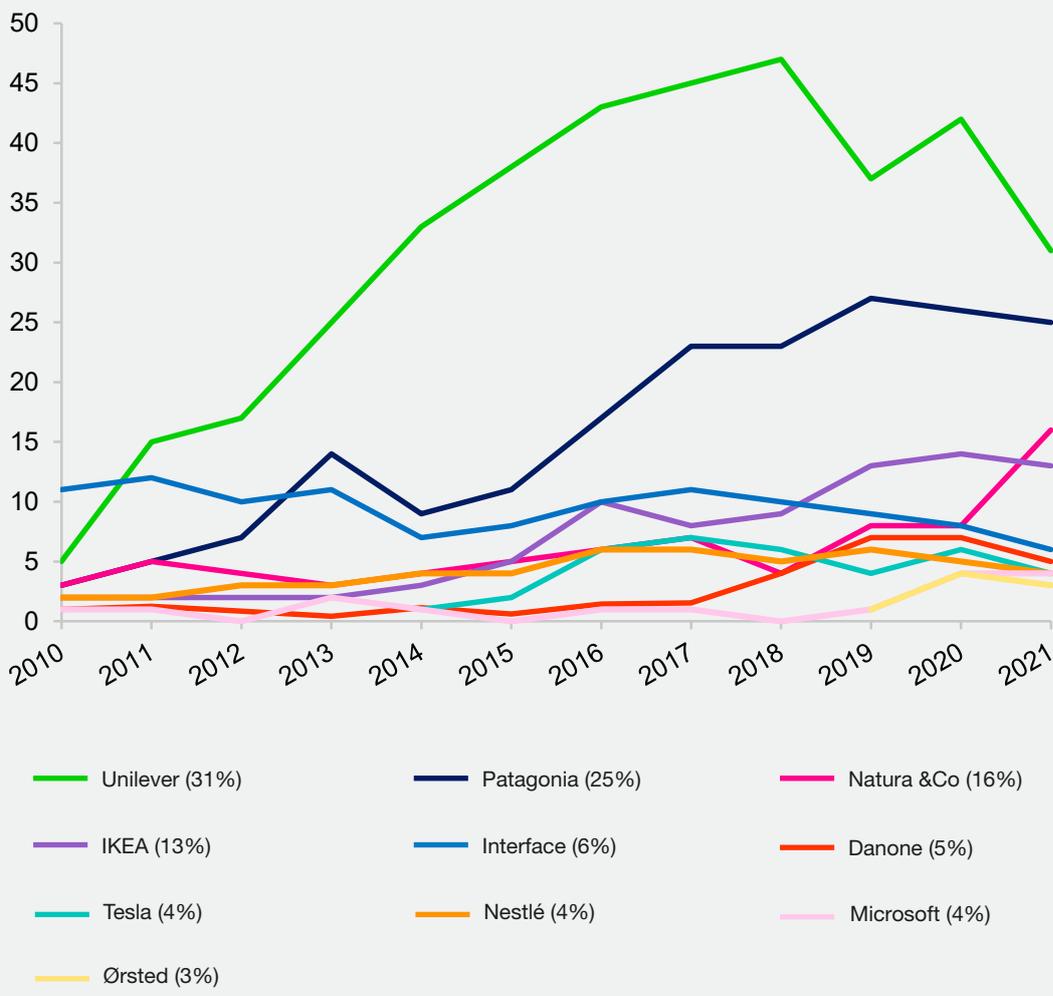
● % of Experts, Unprompted, Total Mentions, 2021

The Gap between Unilever and Other Leaders Continues to Narrow

The proportion of sustainability experts selecting Unilever as a leading company continues to trend down after an uptick in 2020, diminishing the dominance that it has maintained over the past decade. Instead, a broad selection of companies is increasingly recognized. Expert mentions of Natura &Co have increased compared to 2020, bringing it to third position.



What 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.



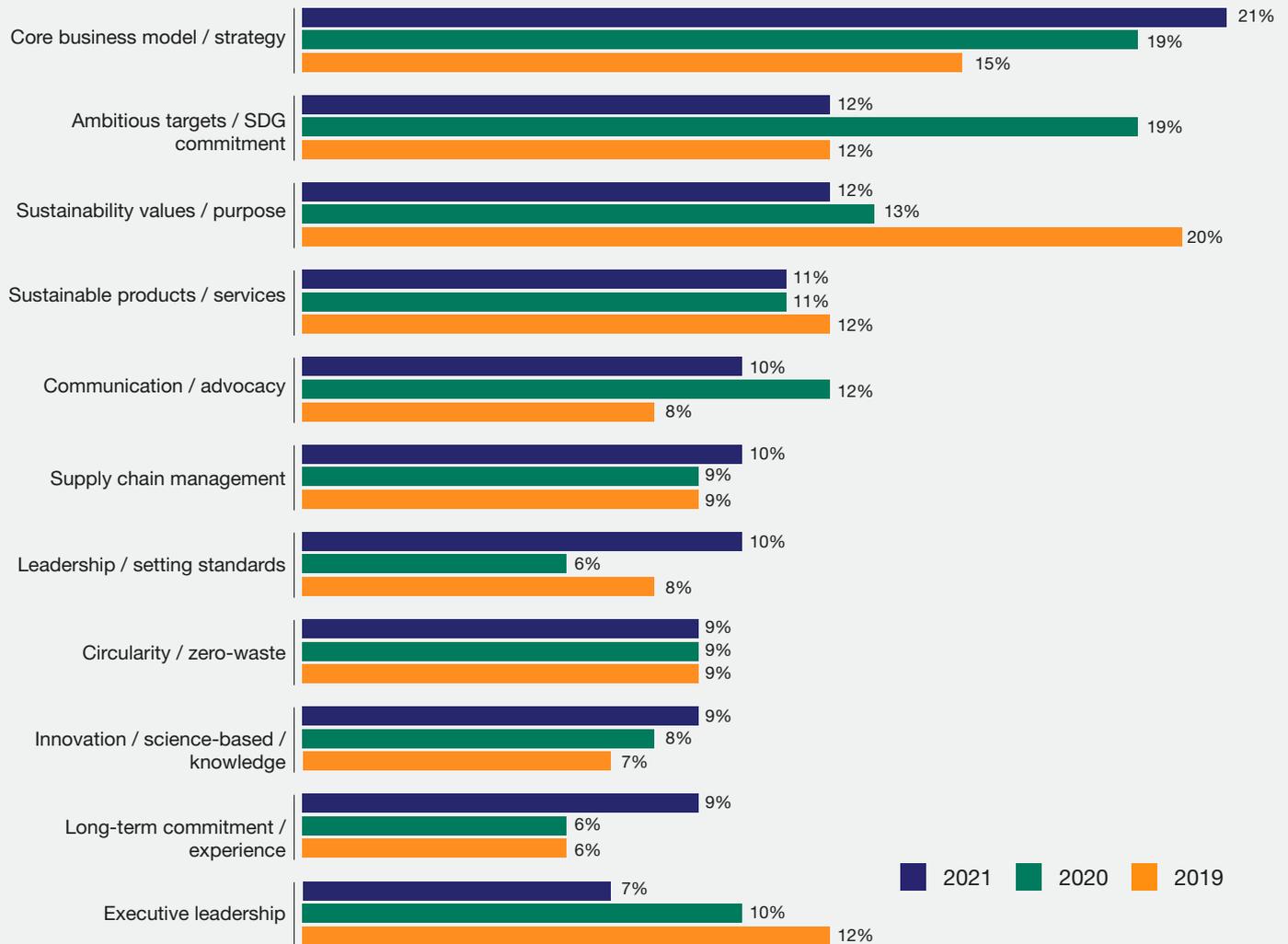
● % of Experts, Unprompted, Total Mentions, 2010-2021

Strategic, Sustainable Business Models Drive Corporate Leadership

Experts are becoming less focused on ambitious targets and commitments, values and purpose, and high-profile executive leadership as drivers of recognized sustainability leadership. Instead, putting sustainability at the core of the business models and strategy is the most frequently cited factor as to why companies are considered leaders.



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, Total Mentions, 2019–2021

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 most sectors and regions cite for naming a leading company, there are some differences. North American sustainability professionals tend to name a broader range of top drivers than do other experts.



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	Core business model / strategy (19%)	Sustainable products / services (19%)	Core business model / strategy (26%)	Core business model / strategy (22%)	Core business model / strategy (29%)	Core business model / strategy (18%)	Core business model / strategy (27%)	Core business model / strategy (19%)	Ambitious targets / SDG commitment; Core business model / strategy (17% each)
2nd most important driver	Supply chain management (13%)	Circularity / zero-waste; Long-term commitment / experience (16% each)	Ambitious targets / SDG commitment (15%)	Sustainability values / purpose (16%)	Circularity / zero-waste (16%)	Sustainability values / purpose (14%)	Leadership / setting standards (14%)	Ambitious targets / SDG commitment (16%)	Circularity / zero-waste; Supply chain management; Sustainability values / purpose (12% each)
3rd most important driver	Ambitious targets / SDG commitment; Sustainability values / purpose (12% each)	Core business model / strategy (12%)	Leadership / setting standards (13%)	Communication / advocacy (12%)	Sustainable products / services (13%)	Ambitious targets / SDG commitment; Leadership / setting standards (12% each)	Sustainability values / purpose; Long-term commitment / experience (11% each)	Supply chain management (14%)	Communication / advocacy; Innovation / science-based / knowledge (11% each)

● % of Experts, by Sector and Region, Unprompted, Total Mentions, 2021.

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 large variety of companies are mentioned. Experts in Latin America / Caribbean and North America elect Natura &Co and Patagonia to the respective number one positions by a large margin, while in other regions companies are more evenly ranked. This year sees the emergence of several new names that have not been mentioned in previous years.

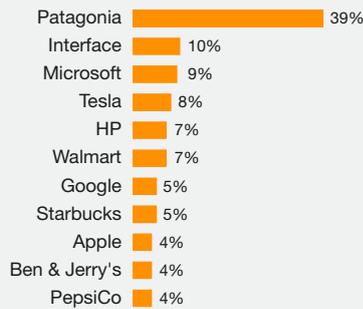


Question

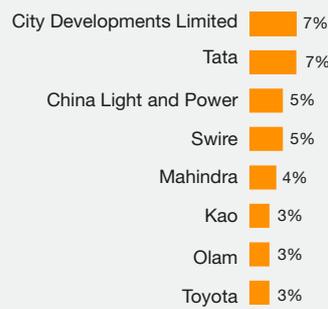
Which companies headquartered specifically in [region where respondent is based] do you think are leaders in integrating sustainability into their business strategy?

Please enter up to three responses.

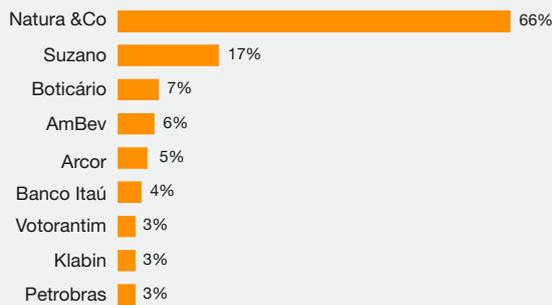
North America



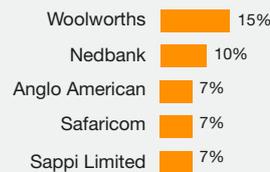
Asia-Pacific



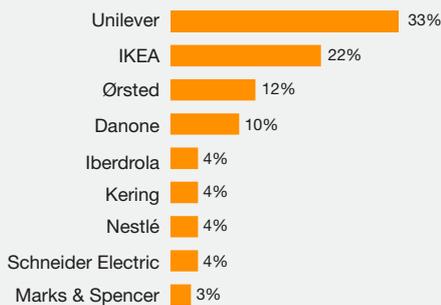
Latin America / Caribbean



Africa / Middle East



Europe



● % of Experts in Each Region, Unprompted, Total Mentions, 2021

COVID-19 Impact on the Sustainable Development Agenda

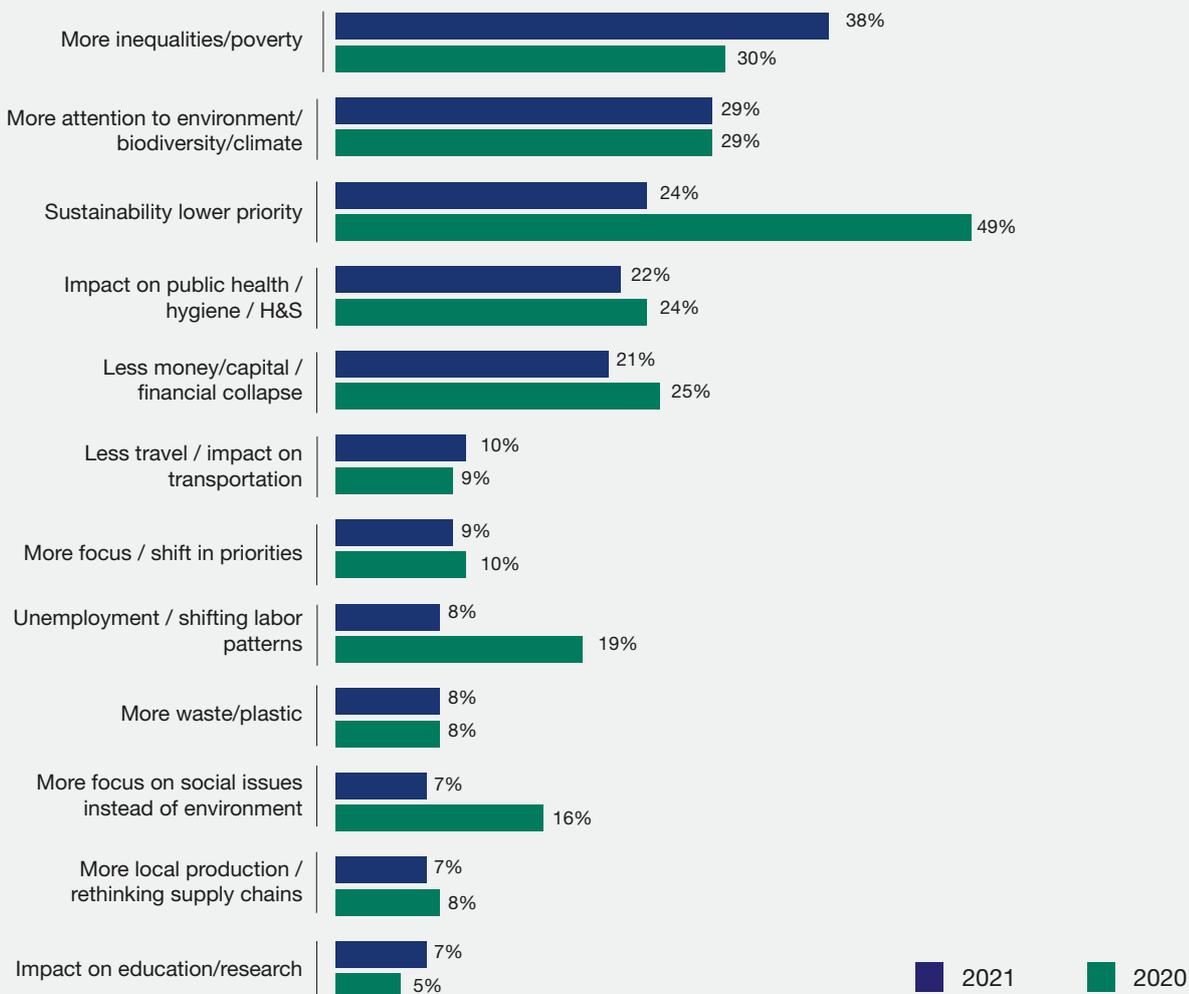


Experts Predict More Inequality and Increased Poverty as Main Effect of COVID-19 and Expect Greater Attention to Environmental Issues

Last year, almost half of experts expected that sustainability would become a less urgent priority due to the effects of the COVID-19 pandemic. This year, sustainability experts are much less likely to predict this outcome. Instead, most experts believe that the main effect of the pandemic will be a rise in inequality and poverty as well as a rise in attention to environmental issues.



How will the COVID-19 pandemic crisis affect sustainable development priorities between now and 2030?
Please enter up to three impacts in the spaces provided.



● % of Experts, Unprompted, Total Mentions, 2020–2021

Experts in Different Sectors and Regions Vary in their Predictions of COVID-19 Impact

Sustainability professionals based in Africa / Middle East and Latin America / Caribbean are more likely than experts in other regions to say that the COVID-19 pandemic will impact the sustainability agenda mainly in terms of increasing inequality and poverty. European experts instead tend to predict increasing attention to the environment as the main outcome from the crisis.



How will the COVID-19 pandemic crisis affect sustainable development priorities between now and 2030?
Please enter up to three impacts in the spaces provided.

	Government	NGO	Academic / research	Corporate	Service / media	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
More inequalities/poverty	28%	42%	42%	37%	36%	43%	29%	26%	69%	33%
More attention to environment/ biodiversity/climate	16%	36%	23%	32%	28%	19%	30%	42%	22%	25%
Sustainability lower priority	20%	27%	25%	20%	27%	17%	29%	23%	22%	24%
Impact on public health / hygiene / H&S	20%	22%	19%	21%	24%	26%	23%	14%	25%	24%
Less money/capital / financial collapse	36%	20%	20%	21%	22%	24%	26%	26%	19%	14%
Less travel / impact on transportation	24%	10%	9%	6%	11%	7%	11%	10%	7%	11%
More focus / shift in priorities	4%	5%	13%	13%	6%	5%	10%	12%	4%	8%
Unemployment / shifting labor patterns	8%	5%	7%	9%	10%	12%	8%	3%	19%	4%
More waste/plastic	8%	8%	11%	8%	7%	5%	7%	5%	8%	13%

• % of Experts, by Sector and Region, Unprompted, Total Mentions, 2021

COVID-19 Impacts: Quotes from Experts

Below we share some verbatim quotes from respondents around the world on how COVID-19 is likely to impact the sustainable development agenda.



How will the COVID-19 pandemic crisis affect sustainable development priorities between now and 2030?
Please enter up to three impacts in the spaces provided.

” Increased awareness of nature and health nexus

Highlight the link between destruction of natural environment and spread of disease. **-USA**

More awareness of interconnections between nature and health. **-Hong Kong**

” Unequal recovery

Inequity of recovery due to vaccination disparities will result in further impacts on the most vulnerable countries and communities. **-USA**

” Realization of potential for action

If the world can find the money to deal with the economic and health impacts of the pandemic it must do the same for the climate crisis. **-Singapore**

Increased recognition that we can act on climate change with the will to act. **-UK**

” Wake-up call

Hopefully, it will be a wake-up call for society to act in a more sustainable manner. This is a wave that all governments and companies should ride. **-Laos**



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