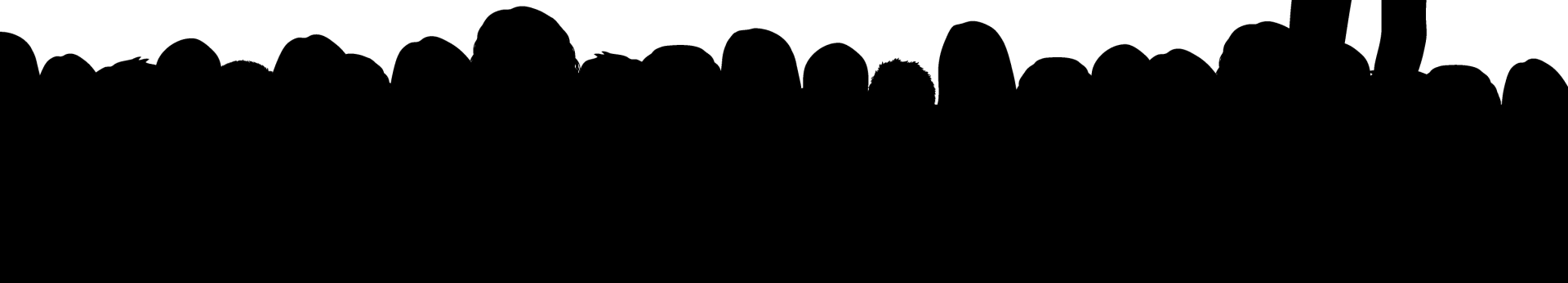


The 2012 Sustainability Leaders

A GlobeScan/SustainAbility Survey



The 2012 Sustainability Leaders

A GlobeScan/SustainAbility Survey



Methodology

- 825 qualified sustainability experts completed the online questionnaire from January 25 to February 10, 2012.
- Respondents were drawn from: corporate, government, non-governmental, academic/research, service/media, and other organizations.
- Experts surveyed span 76 countries in Asia, Africa / Middle East, Europe, North America, Latin America / Caribbean, Australia / New Zealand, and comprise a highly-experienced respondent pool:
 - 65 percent have more than ten years of experience working on sustainability issues.
 - 28 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.

Notes 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

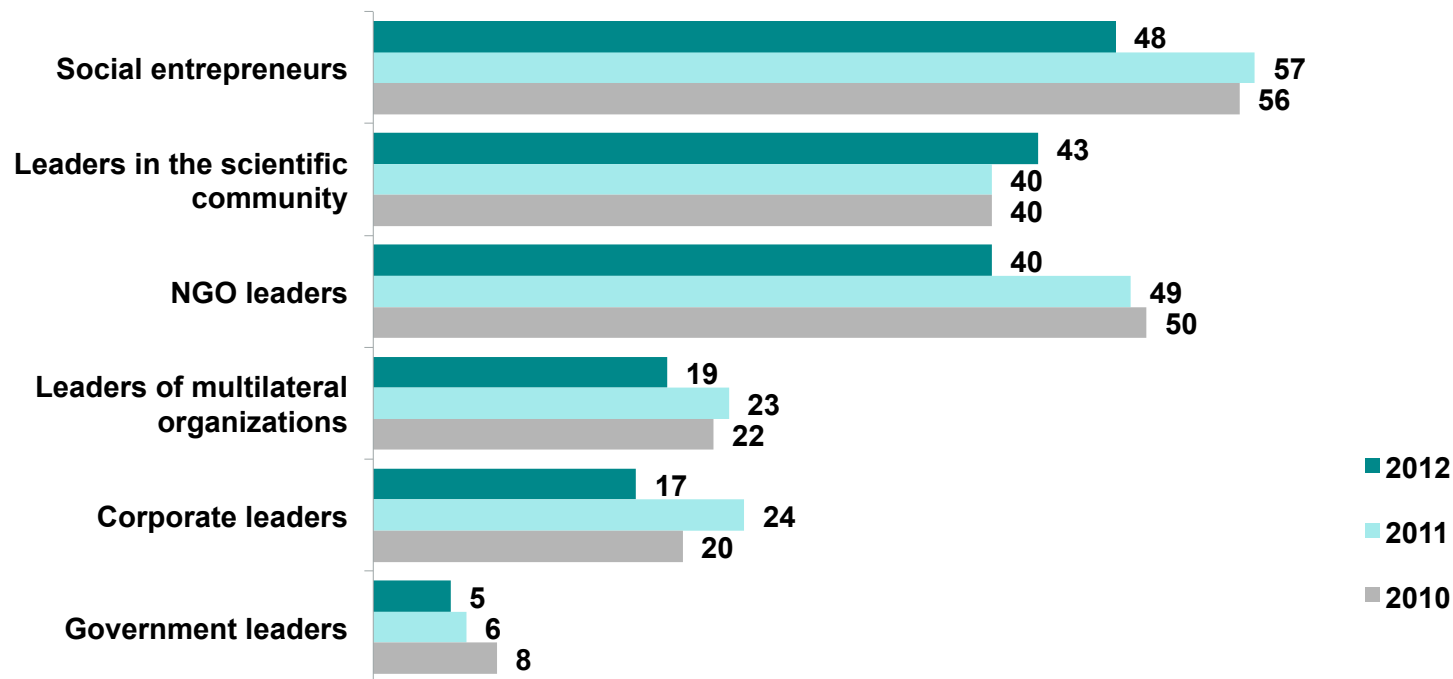
- Overall perceptions of sustainability leadership declined or stalled across nearly all institutional actors (e.g. social entrepreneurs, NGOs, businesses, governments) in 2012.
- While regional differences are present in the perceived efficacy of these institutional actors, all experts agree on the relative inability of corporate and government leaders to advance sustainable development.
- For the second year in a row, Unilever is the outright corporate sustainability leader. Unilever leveraged a strong reputation among corporate peers and the service/media sector, particularly in Europe.
- Four out of the top five and nine out of the top 13 corporate sustainability leaders are holdovers from 2011's sustainability leaders.
- Unilever and Patagonia are the only two companies to gain "market share" in each of the last two years; Meanwhile, GE and Walmart saw significant declines.
- A commitment to sustainable values remains the primary reason a company is cited as a sustainability leader.

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Overall perceptions of sustainability leadership declined or stalled across nearly all institutional actors in 2012; social entrepreneurs continue to be regarded as most effective



Please rate the overall performance of each of the following types of leaders in advancing the sustainability agenda over the past year? Please use a scale from 1 to 5 where 1 is “poor” and 5 is “excellent.”

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Social entrepreneurs gain their reputation for sustainability leadership from media and service sector experts, though with few exceptions, experts are more likely to identify leadership within their own sectors than in others

| | Government | NGO | Academic / Research | Corporate | Service Media |
|---------------------------------------|------------|-----|---------------------|-----------|---------------|
| Social Entrepreneurs | 35 | 48 | 48 | 47 | 54 |
| Leaders in the scientific community | 47 | 45 | 52 | 35 | 37 |
| NGO leaders | 48 | 46 | 45 | 36 | 33 |
| Leaders of multilateral organizations | 18 | 24 | 24 | 15 | 17 |
| Corporate leaders | 12 | 10 | 15 | 30 | 15 |
| Government leaders | 10 | 5 | 5 | 3 | 4 |

“Excellent” (4+5)

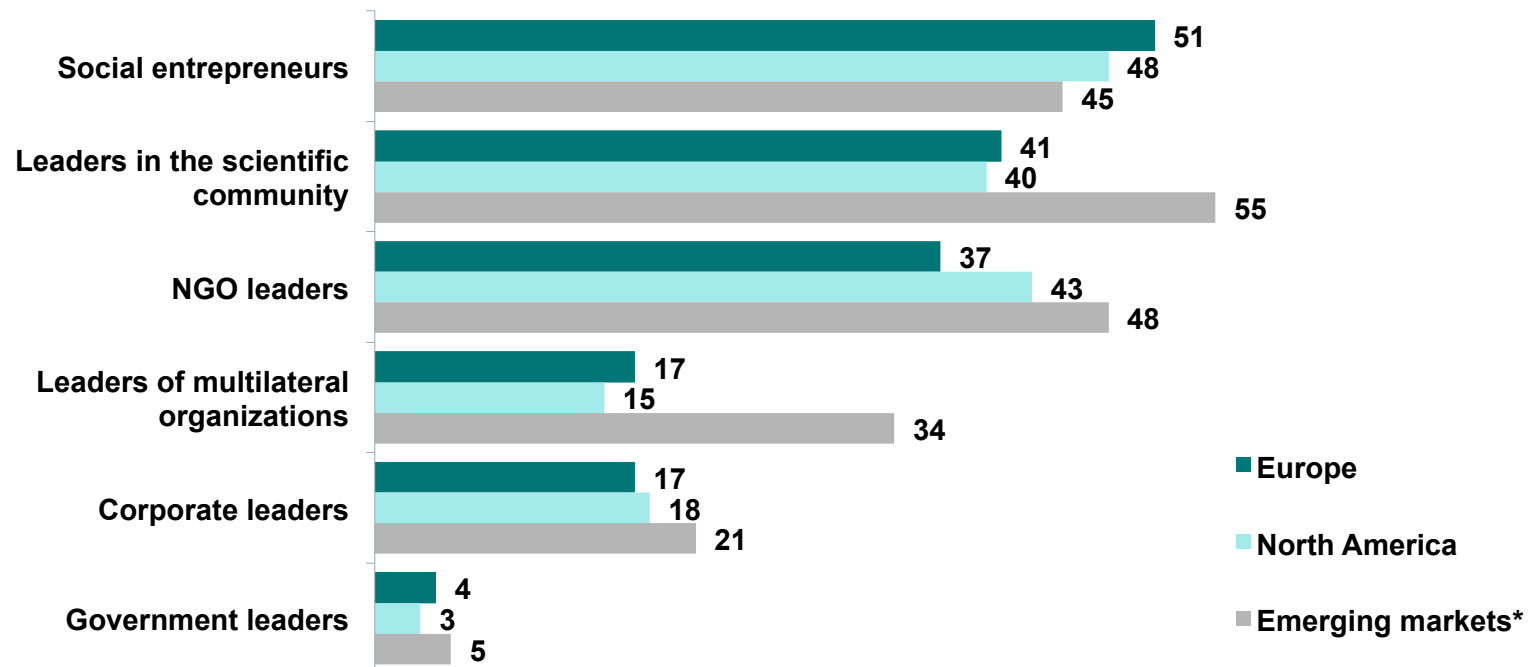
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Experts from emerging markets have a more positive view on the performance of all types of leaders except social entrepreneurs



*Includes Asia, Africa / Middle East, and Latin America / Caribbean

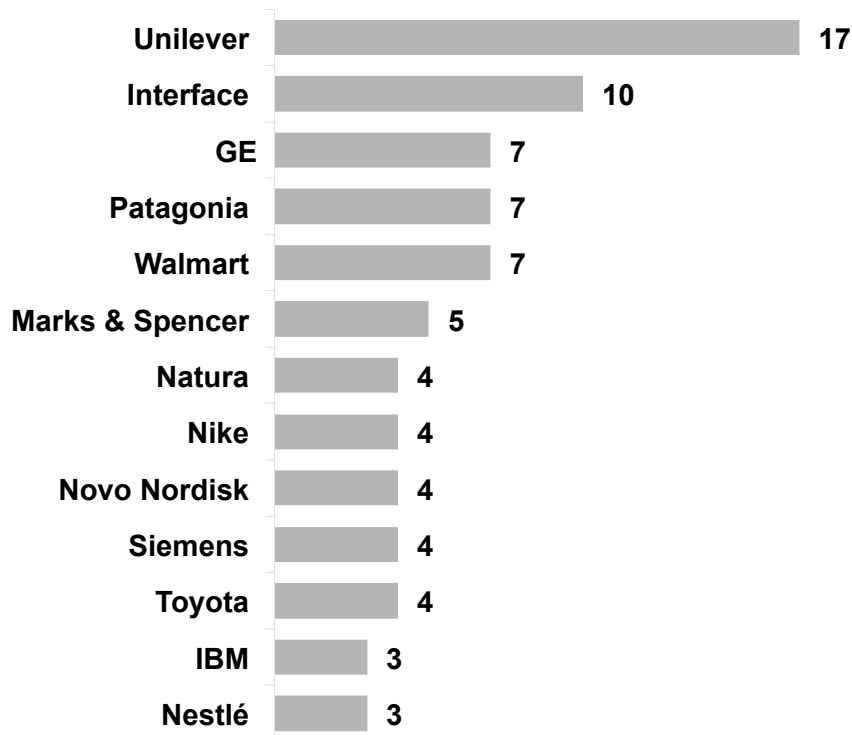
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For the second year in a row, Unilever is seen as the top corporate sustainability leader, while Patagonia breaks into the top five this year



What specific companies do you think are leaders in integrating sustainability into their business strategy? (OPEN-ENDED)

The 2012 Sustainability Leaders

A GlobeScan/SustainAbility Survey



Unilever has a significantly stronger reputation among corporate peers and service/media than among other respondents

| | Government | NGO | Academic / Research | Corporate | Service Media |
|----------------------------|------------|-----|---------------------|-----------|---------------|
| Unilever | 10 | 9 | 12 | 22 | 24 |
| Interface | 9 | 8 | 8 | 11 | 12 |
| GE | 6 | 5 | 6 | 11 | 7 |
| Patagonia | 9 | 10 | 7 | 8 | 5 |
| Walmart | 9 | 6 | 6 | 7 | 9 |
| Marks & Spencer | 1 | 3 | 3 | 9 | 7 |

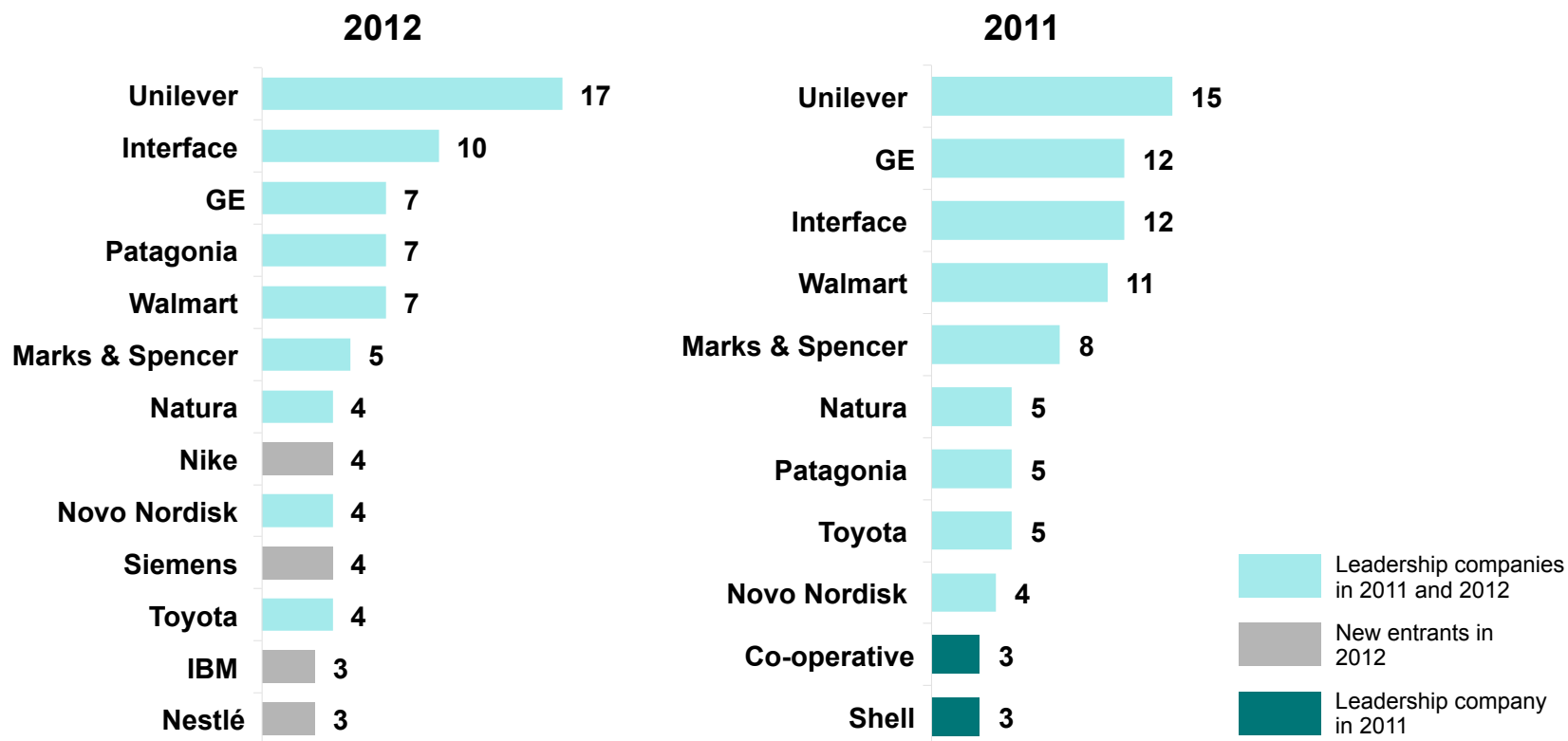
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The top sustainability leaders in 2012 are largely unchanged from 2011



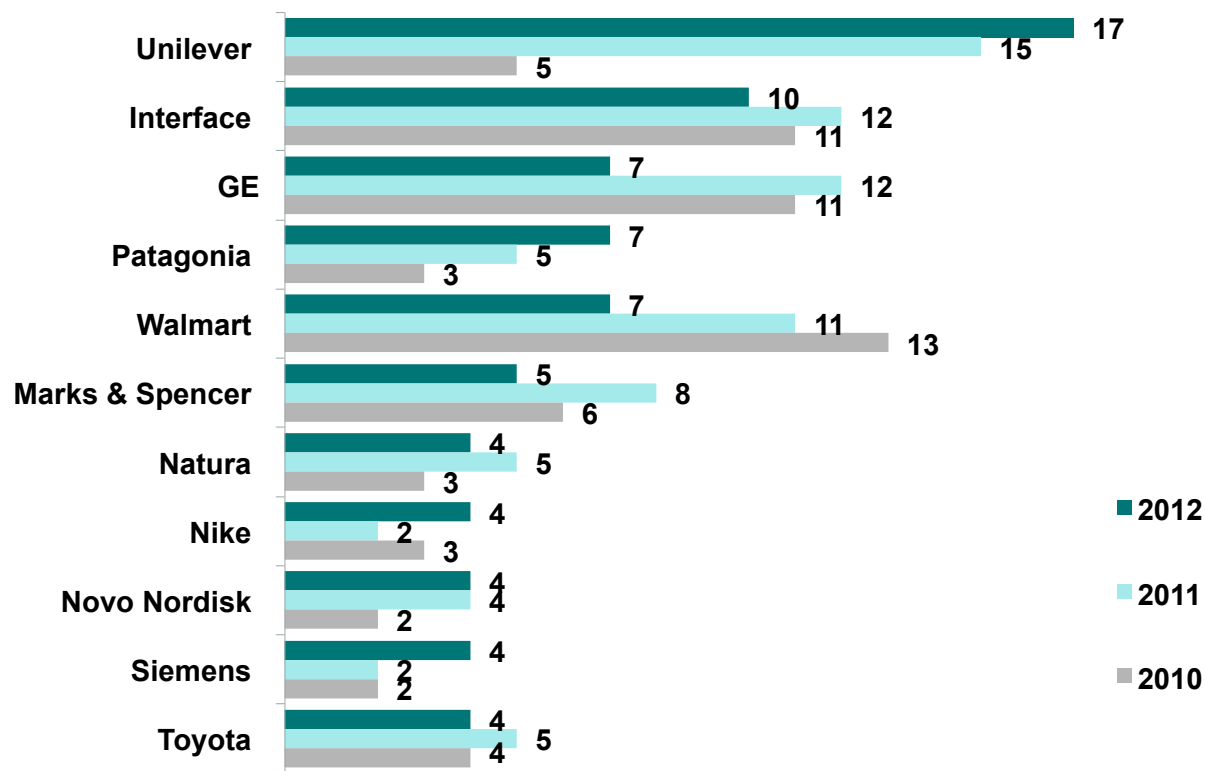
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Unilever and Patagonia have gained “market share” in each of the last two years; meanwhile, GE, and Walmart have seen significant declines



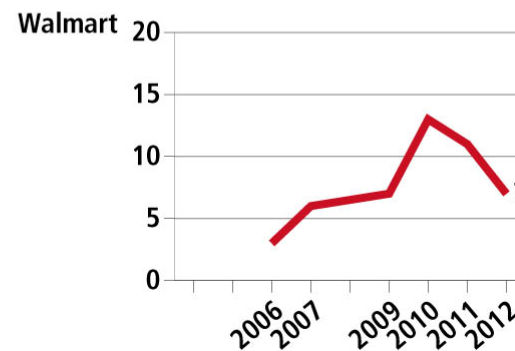
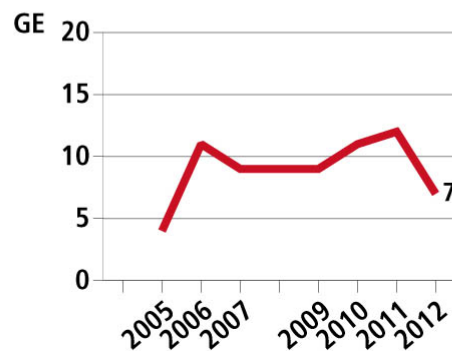
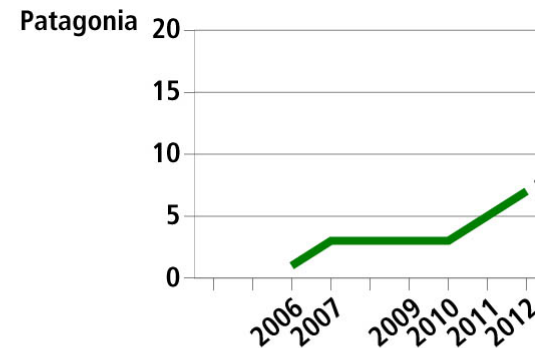
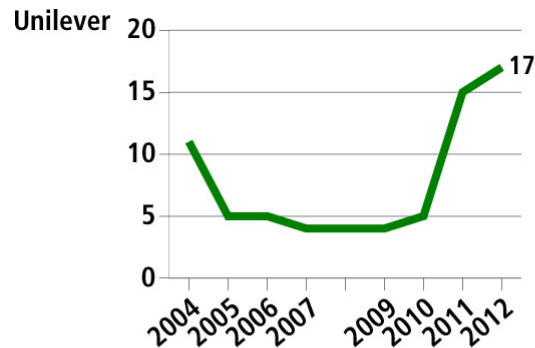
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Unilever and Patagonia have gained “market share” in each of the last two years; meanwhile, GE, and Walmart have seen significant declines



TSS12w1_2_trend

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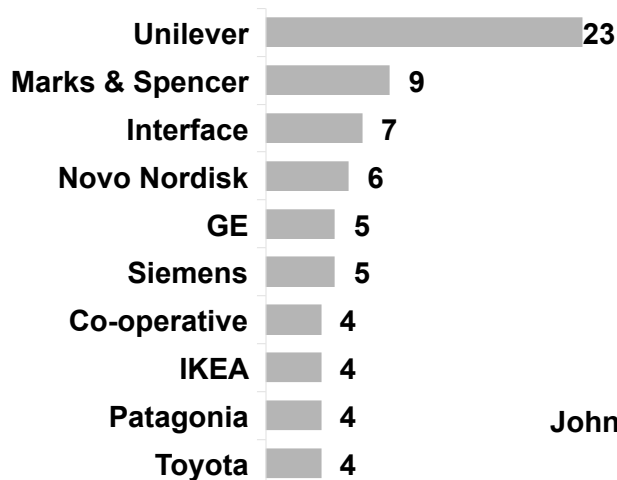
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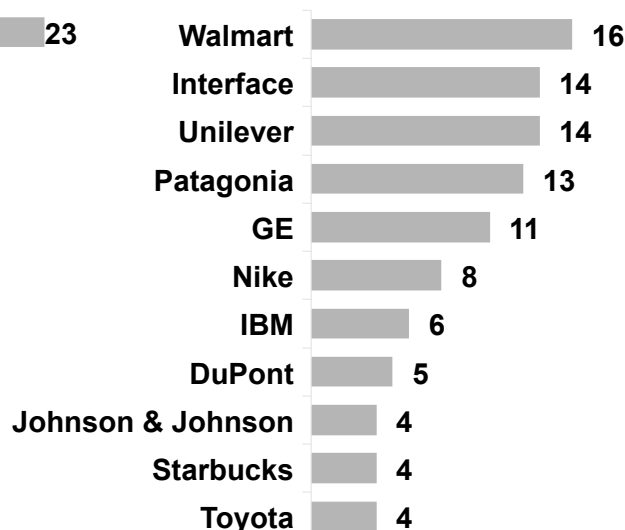


Unilever has a strong reputation among experts in Europe, while Walmart leads in North America and Natura leads in emerging markets

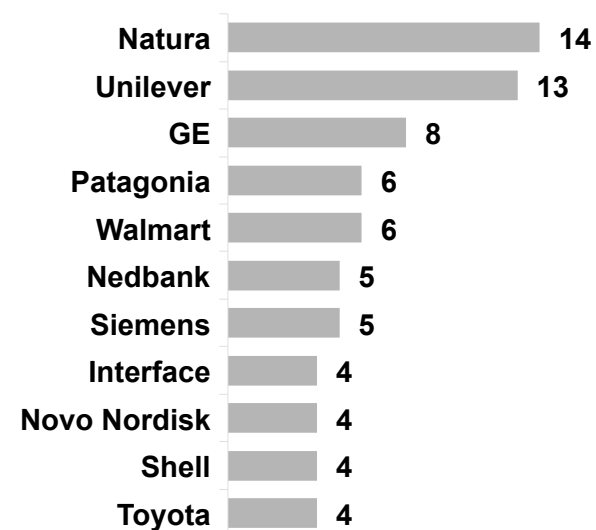
Europe



North America



Emerging Markets*



*Includes Asia, Africa / Middle East, and Latin America / Caribbean

What specific companies do you think are leaders in integrating sustainability into their business strategy? (OPEN-ENDED)

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Experts identify a number of reasons why top companies are regarded as sustainability leaders

Sustainable Living Plan brings together sustainability and business strategy in a way unprecedented for a company of such size and impact.

Integrated long-term thinking into their strategy, and as a result have identified the need for more sustainable behavior to protect theirs and society's interests.

Because it focus[es] its own business on products that have better environmental and social impacts than its competitors.



They are “walking the walk”—based on the leadership that Ray Anderson had provided to them.



Challenging business models or at least attempting to... Their radical strategy change in which they convince consumers to consume less—and bring their old clothes for repair.

Sustainability is practiced as a moral and values proposition.

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

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Experts identify a number of reasons why top companies are regarded as sustainability leaders

Pushing sustainability through its supply chain... It has set out its sustainability agenda and made it public.



Ecomagination continues to be the model for making money from "greener" practices.



SIEMENS

Nike has quietly begun focusing on sustainable manufacture of its products, sustainable development of their products and the conception of a sustainable marketplace, in which their products have a high degree of re-use.



Thought leaders on urban sustainability and focusing their core business competencies on an issue that can effect... change on a grand scale in collaboration with other actors in society...

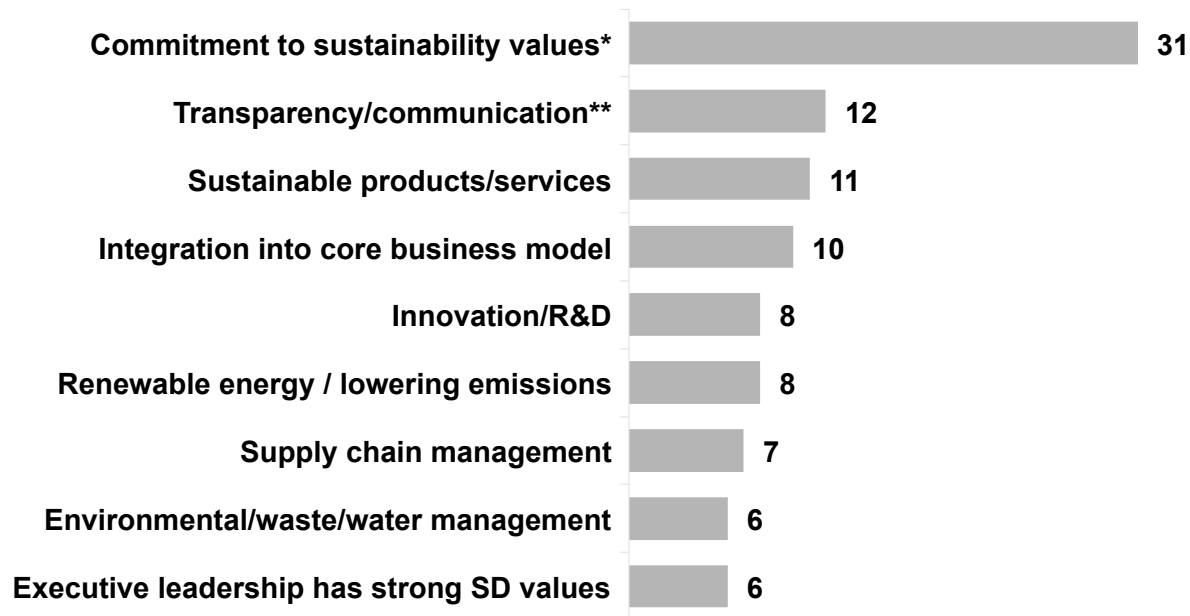
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A commitment to sustainable values remains the primary reason a company is cited as a sustainability leader



*Sustainability values integrated/embedded / Ambitious goals/targets/policies / Long-term commitment / Actions/results/walk the talk

**Transparency / Education/engagement/dialogue/stakeholders / Communication/reporting

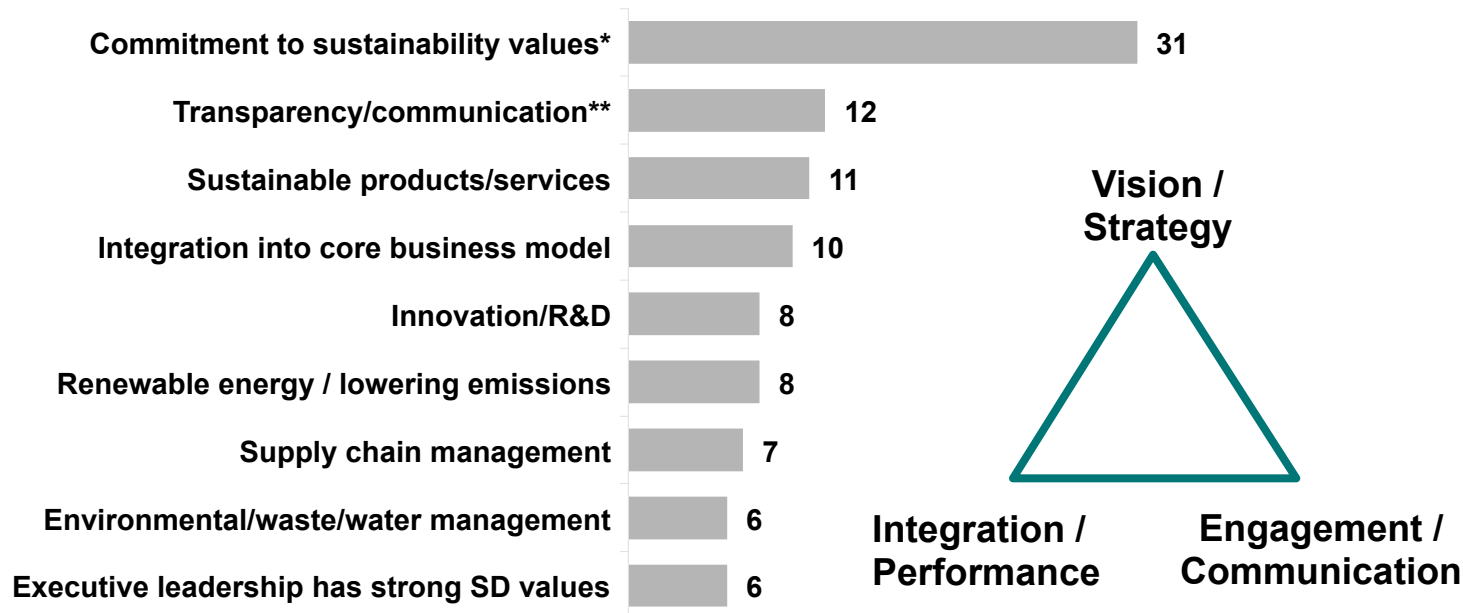
Why do you think [INSERT COMPANY #1 FROM ABOVE] is a leader in sustainable development? Please enter up to two responses in the spaces provided.

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The “sustainability leadership triangle” reflects how companies can approach and demonstrate commitment to sustainability values



*Sustainability values integrated/embedded / Ambitious goals/targets/policies / Long-term commitment / Actions/results/walk the talk

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

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