



# GlobeScan Briefing: Insights on Corporate Sustainability Leadership

GlobeScan Incorporated  
April 2020



# Who we are



Building **trusted leadership** to create a **better future**

# Who we are

## Inform



## Advise



## Connect



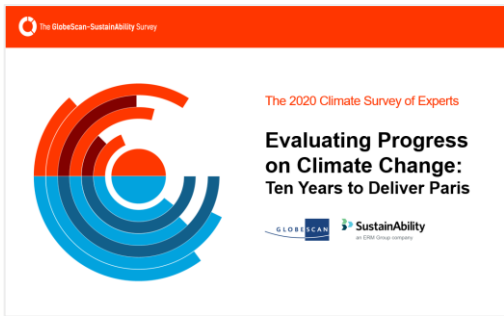
# The briefing this morning



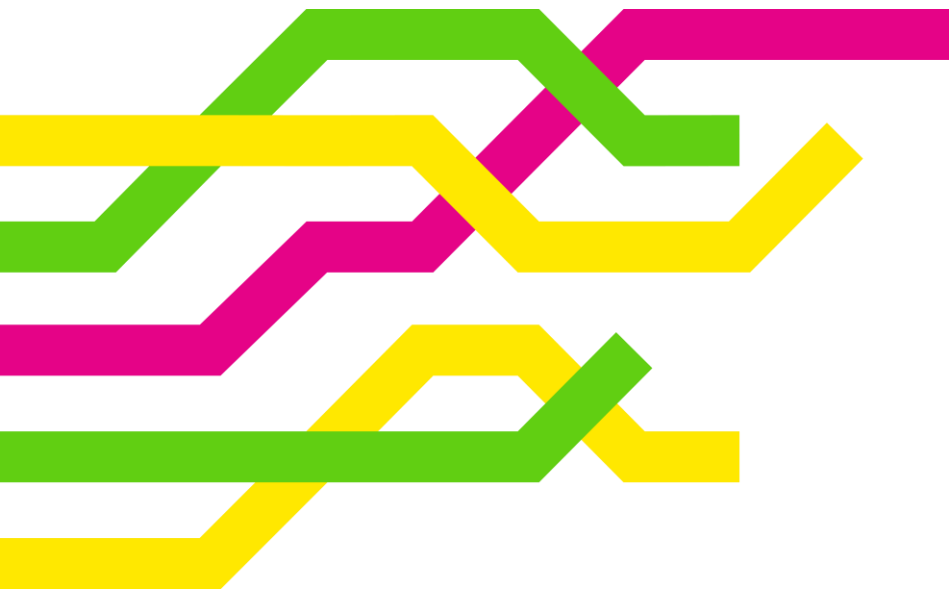
Recognized sustainability leadership  
Trends and opportunities



Response to COVID-19  
Framework and best practices



Our next battle: climate change  
Expectations and risks



The 2019

# Sustainability Leaders

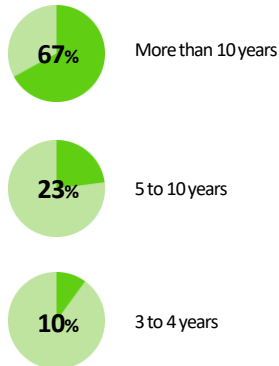


# Survey Methodology

807 qualified sustainability experts

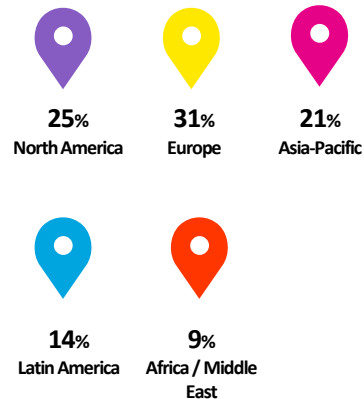
## Experience

Respondents have the following experience working on sustainability issues:



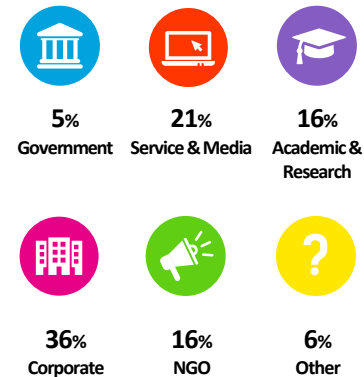
## Geography

Experts surveyed span 78 countries in the following regions:



## Sectors

Respondents were drawn from the following sectors:



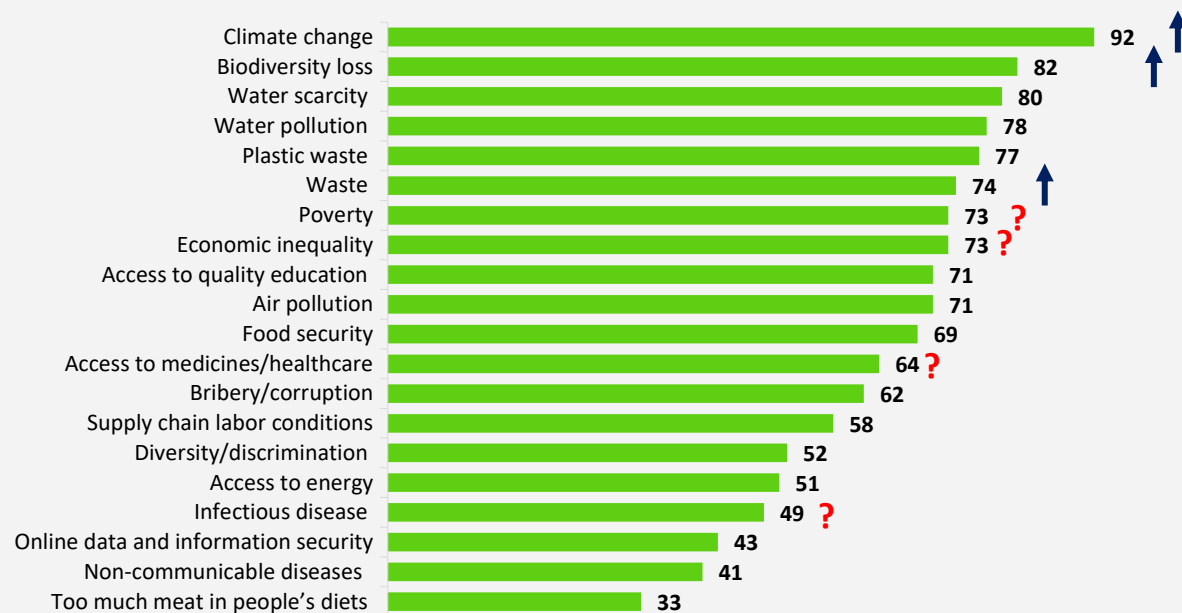
# Our Context



# Urgency of Sustainable Development Challenges

Climate Change and Biodiversity Loss Considered Most Urgent Challenges

**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.”*



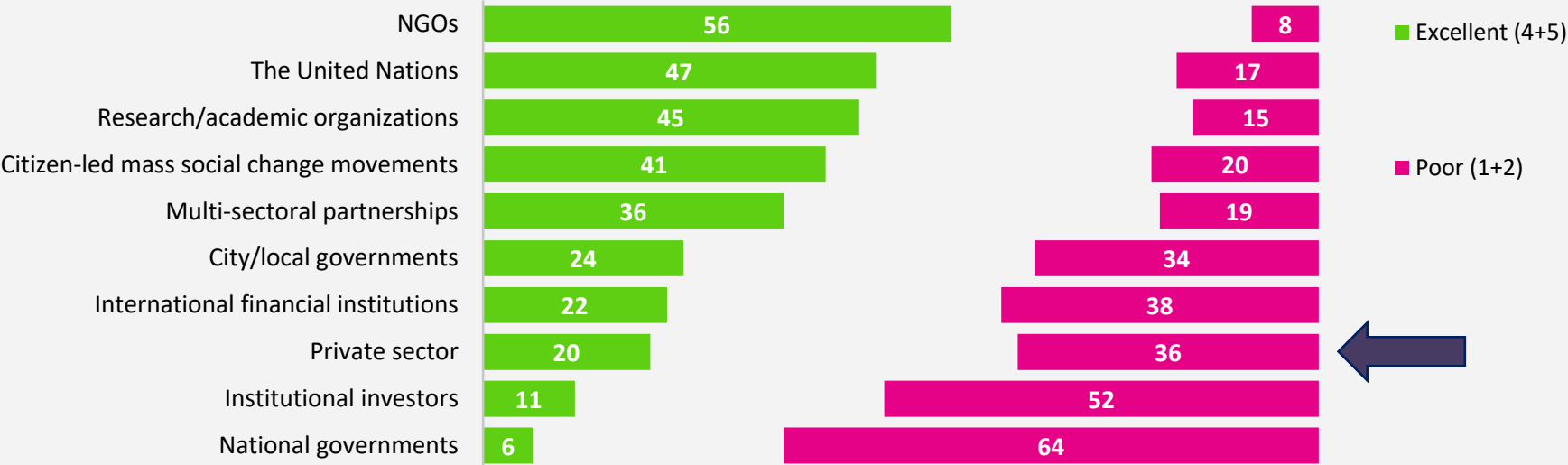
% of Experts, "Very urgent" (4+5), 2019



# NGOs, UN and Academia Demonstrate Leadership

NGOs Perceived as Strongest Performers

**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”.*

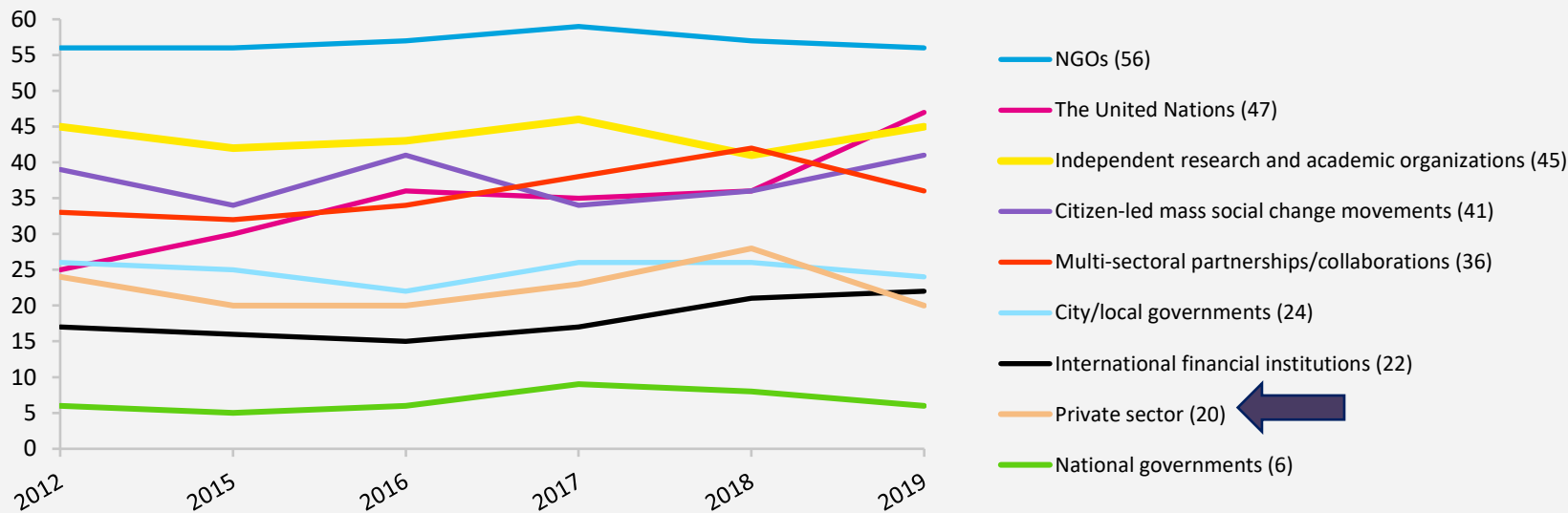


% of Experts, 2019

# Business Performance Drops, While Views of the UN Improve

Private Sector, Multi-sectoral Partnerships' Perceived Performance Drops while United Nations Ratings Increase

**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”.*

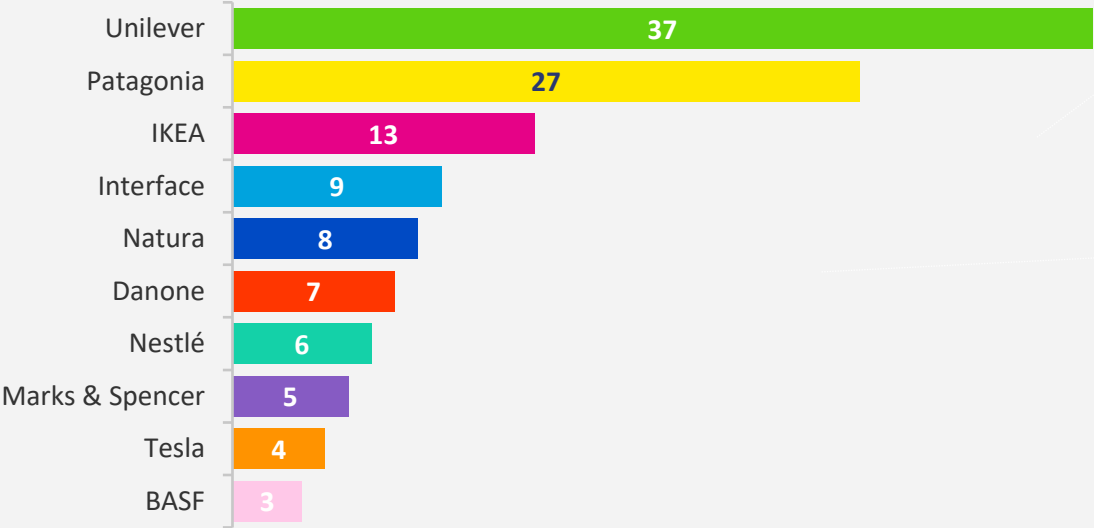


% of Experts, “Excellent” (4+5), 2012–2019

# Corporate Leaders

# Global Corporate Leaders

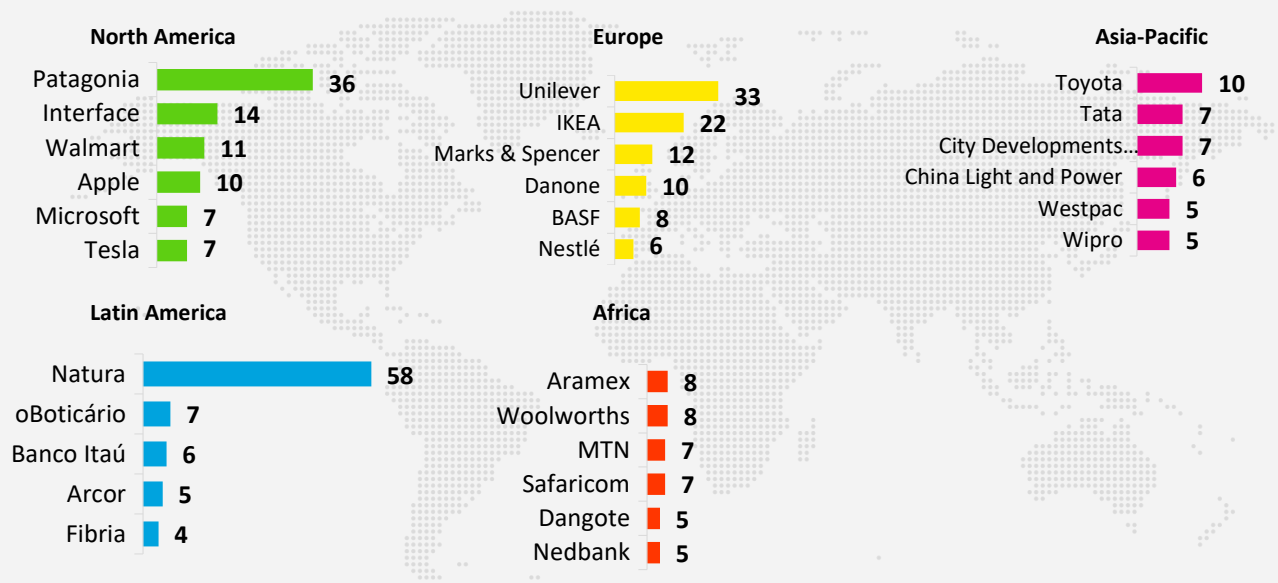
**Question:** What specific companies do you think are leaders in integrating sustainability into their business strategy?  
*Please enter a maximum of 3 companies in the spaces provided.*



% of Experts, Total Mentions, Unprompted, 2019

# Corporate Leaders Headquartered in Different Regions

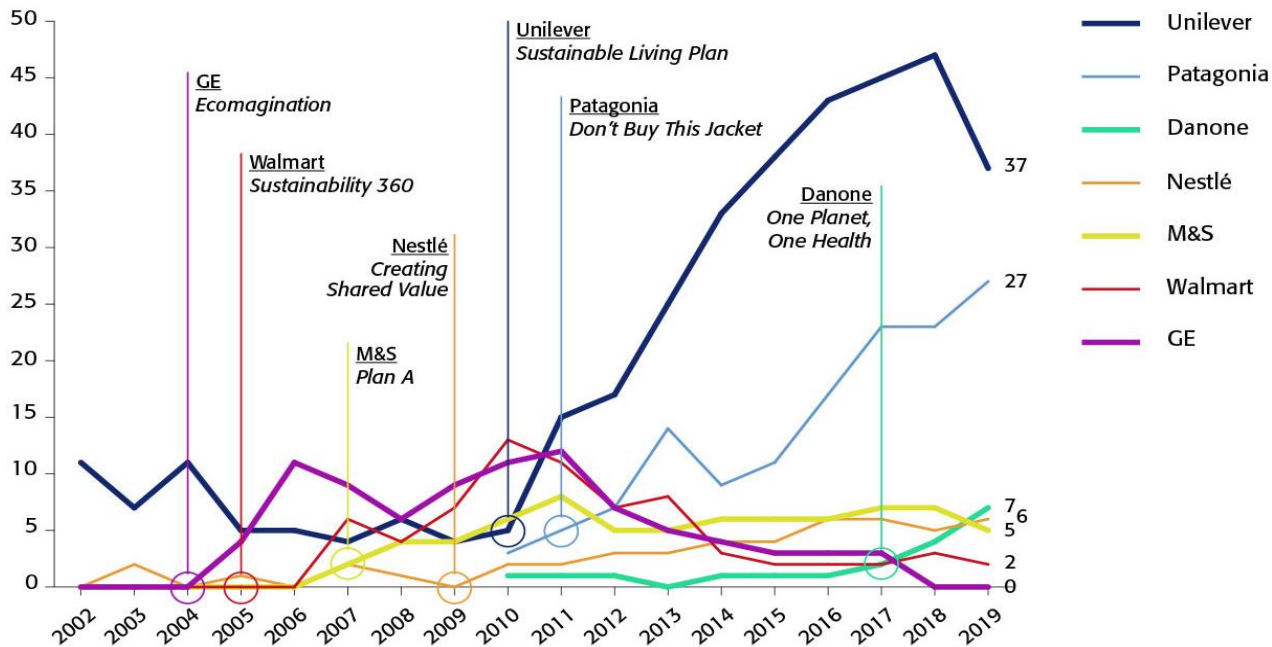
**Question:** Which companies headquartered specifically in [REGION] do you think are leaders in integrating sustainability into their business strategy?  
Please enter a maximum of 3 companies in the spaces provided.



% of Experts, by Region, Unprompted, Total Mentions, 2019

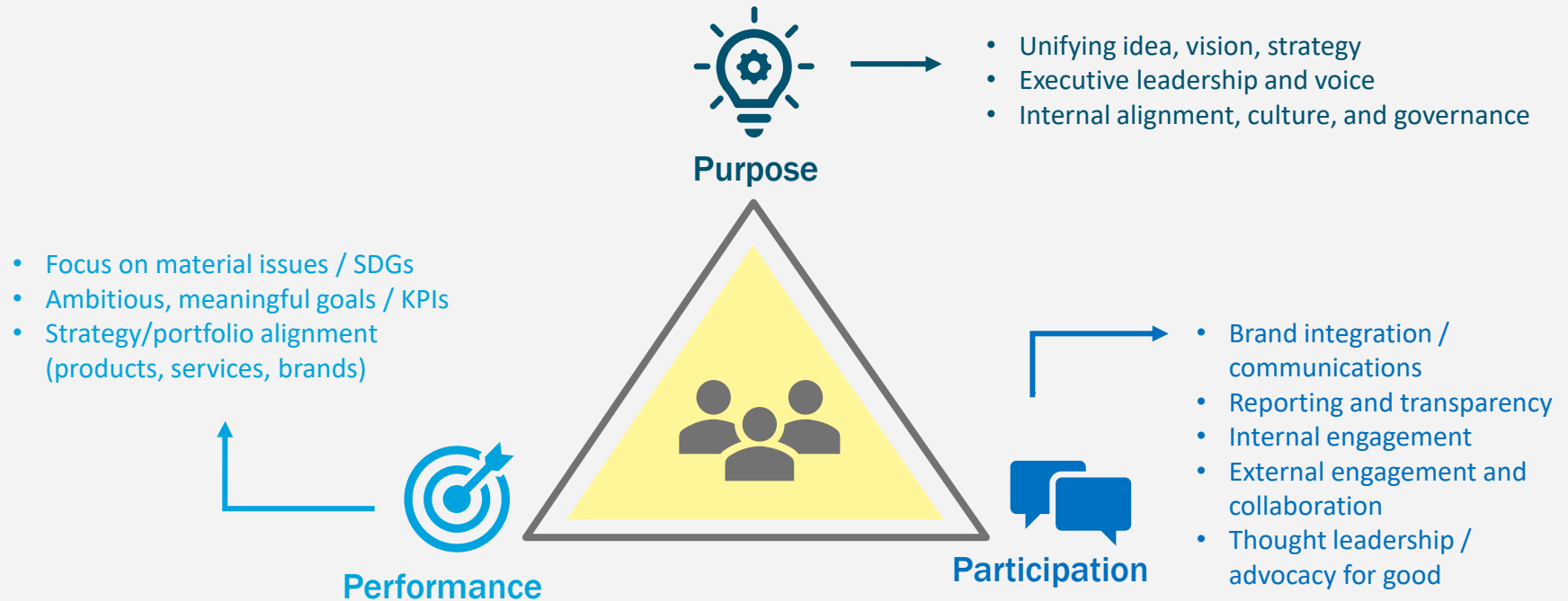
# Global Corporate Leaders: Trends in Leadership

**Question:** What specific companies do you think are leaders in integrating sustainability into their business strategy?  
Please enter a maximum of 3 companies in the spaces provided.



% of Experts, Total Mentions, Unprompted, 2010 -2019

# A framework for recognized corporate leadership







# Purposeful Leadership in a Time of Crisis

*A global landscape review of corporate response to the Covid-19 crisis  
by GlobeScan Incorporated*

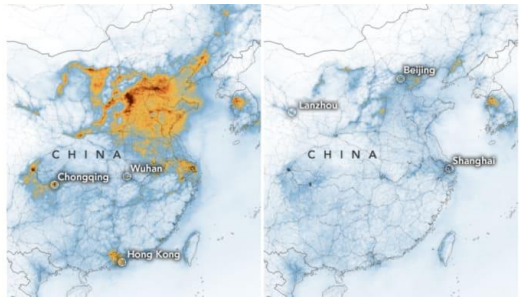
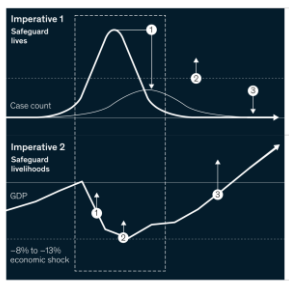
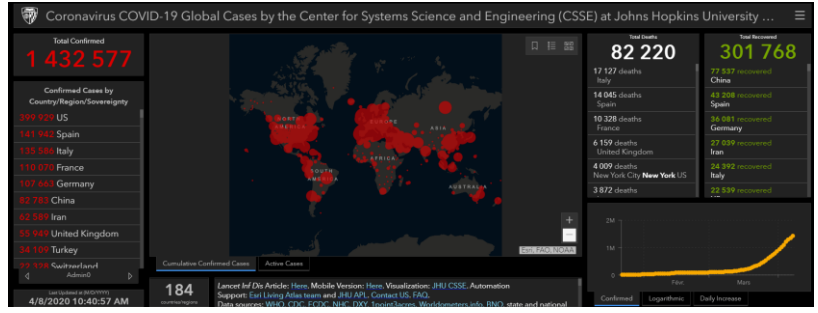
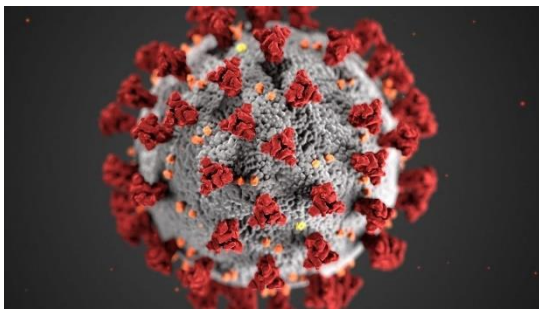
# Our world turned up side down



World  
'Clear we have entered recession':  
IMF chief

COVID-19 will cause a record-setting  
recession, economists say

"From full throttle to sudden stop," Wells Fargo economists say

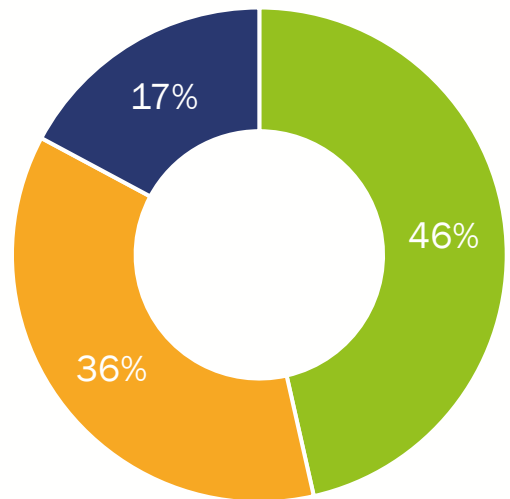


# A relatively good response from businesses

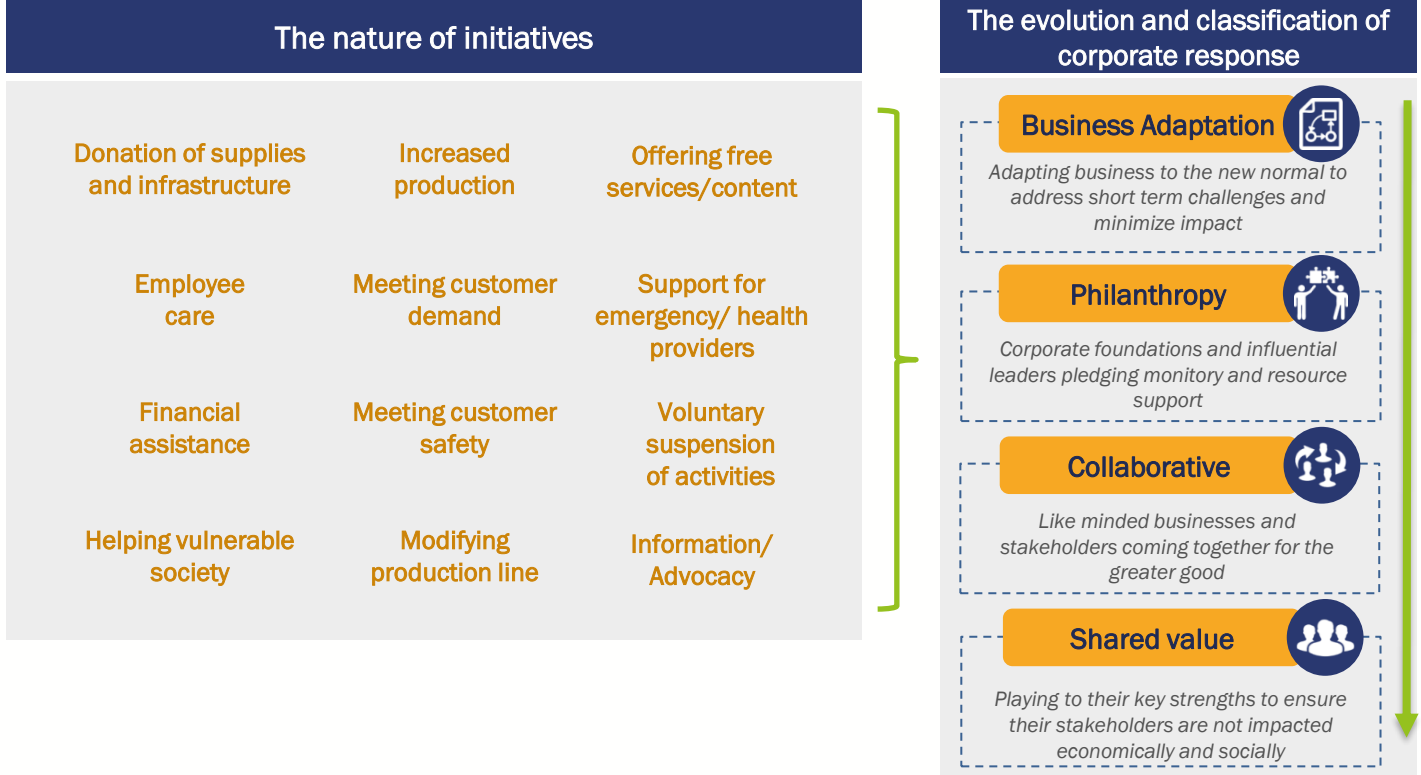
Question:

Overall, how well do you think business has performed in responding to the needs of society in the fight against the COVID-19 pandemic?  
(Sample: n= 99)

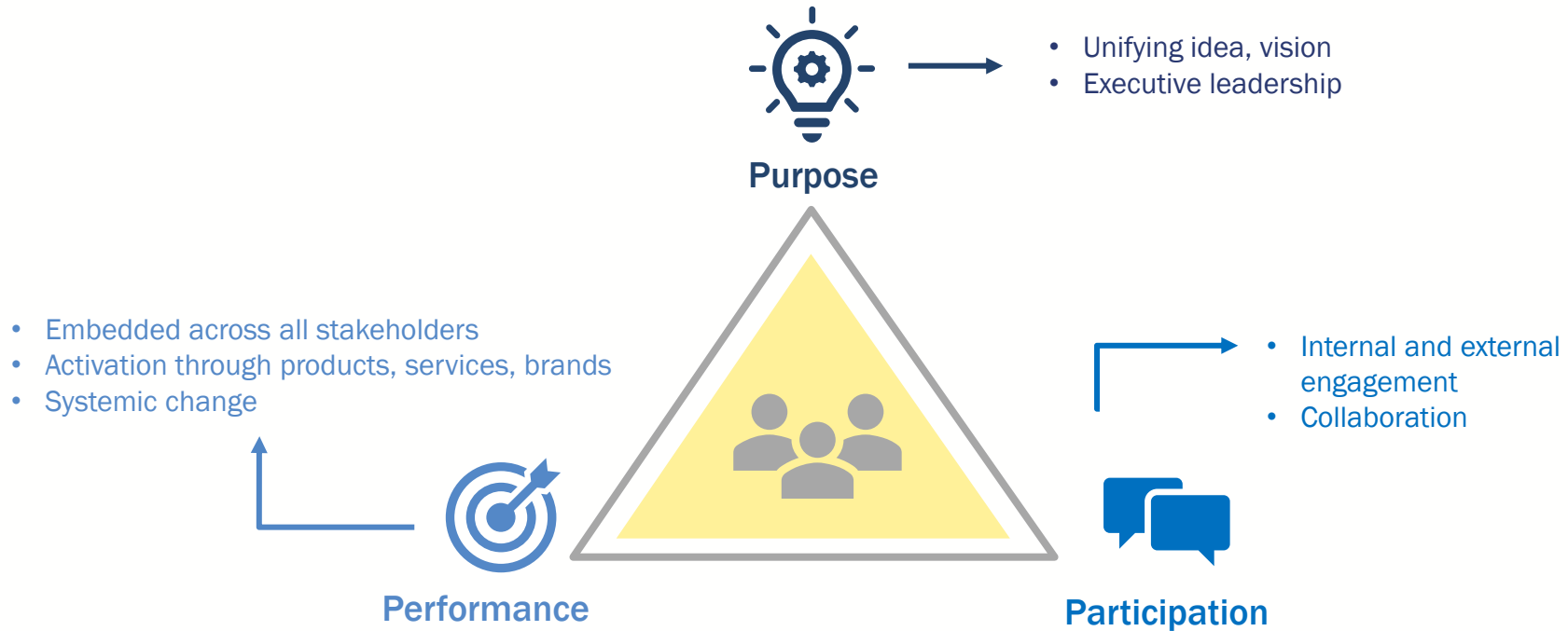
Well / Very well      Average      Poor / Very poor



# A wide range of corporate responses to COVID-19



# How well do corporates live up to leadership expectations?



## Best practice example



**DANONE**  
ONE PLANET. ONE HEALTH

# Danone

## Corporate Level



### UNIFYING IDEA

- Two clear priorities:
  - 1) Employee safety;
  - 2) Continuity in food supply

### EXECUTIVE LEADERSHIP

- Emmanuel Faber engaging across media

### INTERNAL ENGAGEMENT

- All working contracts and salary incomes throughout the world guaranteed until end of June
- 1,000 euros bonus for employees on the field
- Extensive Covid-19 health coverage for all employees and their family
- Maintaining existing training plans to upskill and reskill employees toward priority activities

### ACROSS STAKEHOLDERS

### SYSTEM CHANGE

### Performance

## Purpose



### COLLABORATION

### Participation

- Leading new CGF coalition gathering manufacturers & retailers, in tandem w/ health authorities, to help people lead healthier lives
- Working group as part of Business Collective for a More Inclusive Economy

L'EXPRESS

**Covid-19: Danone garantit emplois et salaires dans le monde pour 3 mois**

LE FIGARO

**Covid-19: Danone va verser une prime de 1000 euros à ses employés sur le terrain**



Danone  
@Danone

A new @CGF\_The\_Forum coalition led by manufacturers & retailers, in tandem w/ health authorities, to help people lead healthier lives. Member companies act to protect employees, ensure access to food&hygiene goods, and show solidarity w/ local communities



# Danone

## Country Level

- In **Spain**, social action programme "Food for Love" supporting employees, members of the food chain, vulnerable groups and families
- In **Malaysia**, subsidiary donating masks and hand sanitizers to hospitals and clinics
- In **Morocco**, subsidiary donating dairy products to families in need
- Danone **North America** donating \$300,000 in products to help feed the needy
- In **France**, Danone's water division dedicating a production line to the production of 100,000 bottles of hydroalcoholic gel for pharmacies

ACROSS  
STAKEHOLDERS

BRAND/PRODUCT  
ACTIVATION

Performance



[CORPORATE LEVEL]

Purpose



EXTERNAL  
ENGAGEMENT

COLLABORATION

Participation

- In the **UK**, part of collective industry effort (40 retailers and suppliers) distributing 20,000 pallets of food to the needy
- In **Germany**, supporting parents and parents-to-be on supply concerns due to stockpiling and offers seven tips to protect babies
- In **China**, collaboration with the China Red Cross & contribution of Yuan 23 million (cash, goods, ambulances)
- In **Morocco**, donating 10 MDH for the country's Special Fund dedicated to Covid-19 Response
- In **North America**, donating \$1.2 million in cash to food organizations
- In the **UK**, partnership with Neighbourly Community & contribution to a £ 500 000 fund to help communities



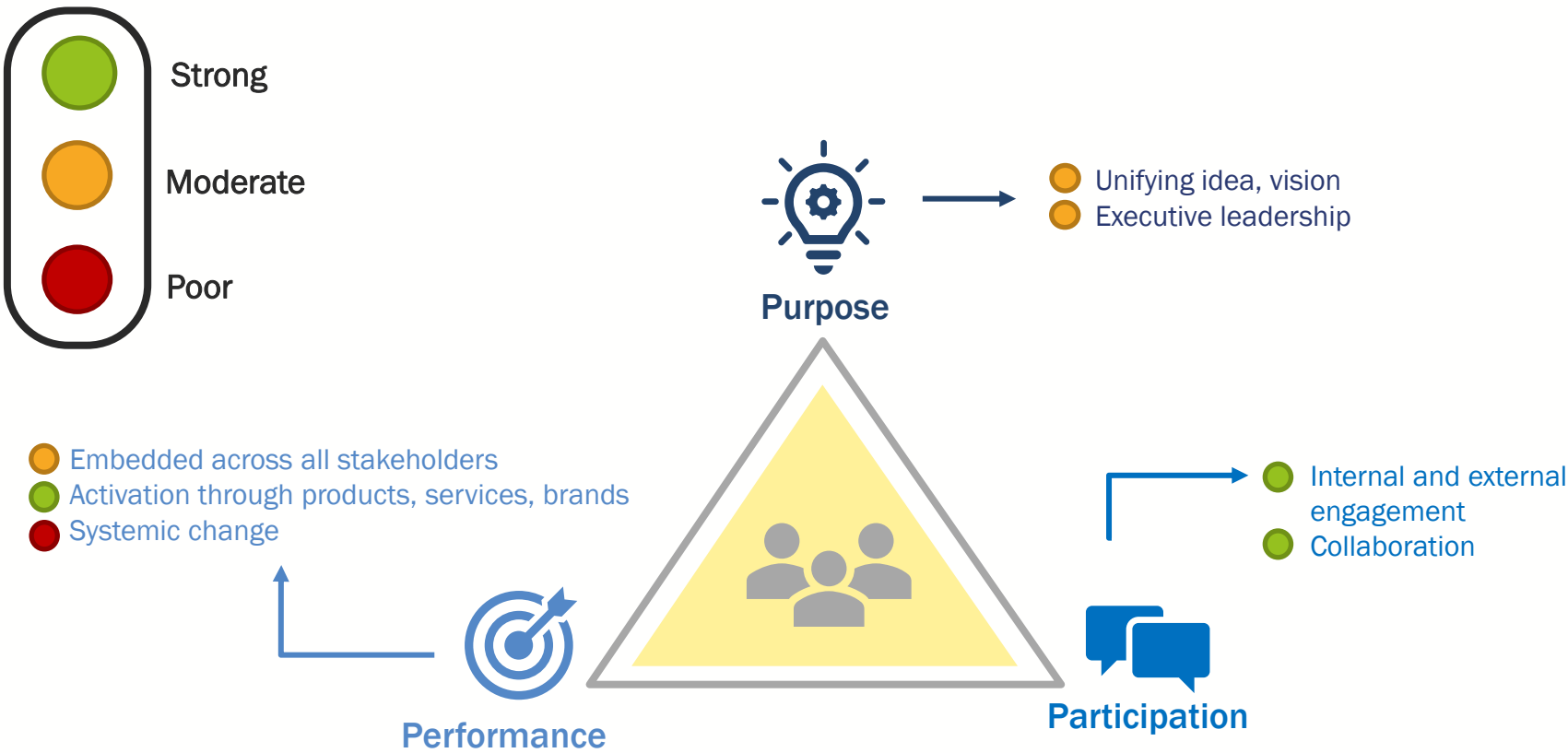
LesEco.ma

Gestion du Covid-19: Centrale Danone  
verse un don et distribue ses produits



**Danone North America donates to help feed those in need during COVID-19 crisis**

# How well do corporates live up to leadership expectations?





The 2020 Climate Survey of Experts

# Evaluating Progress on Climate Change: Ten Years to Deliver Paris



# Global public opinion: Escalation of environmental concern



"Very Serious," Average of 17 Countries,\* 2001–2019

**Question:** For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious or not at all serious problem.



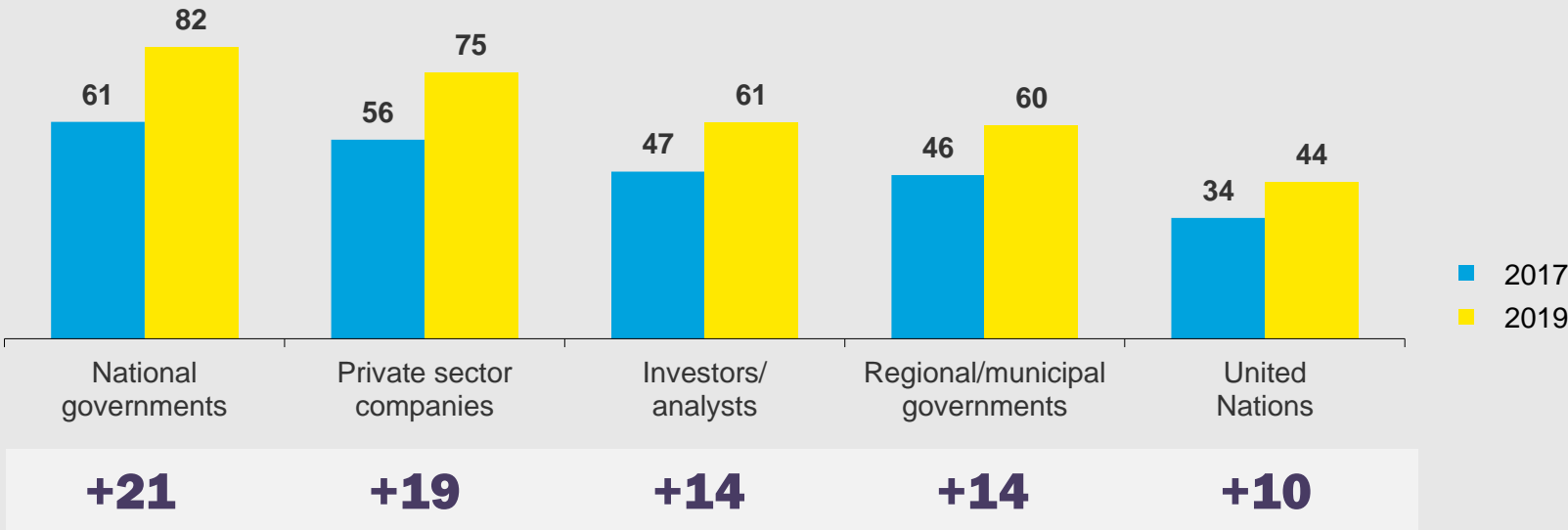
\*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked in GlobeScan's Radar research programme, using an in-person and telephone methodology.



# Government, business & investor action increasingly important

Importance of actors for progress toward Paris Goals

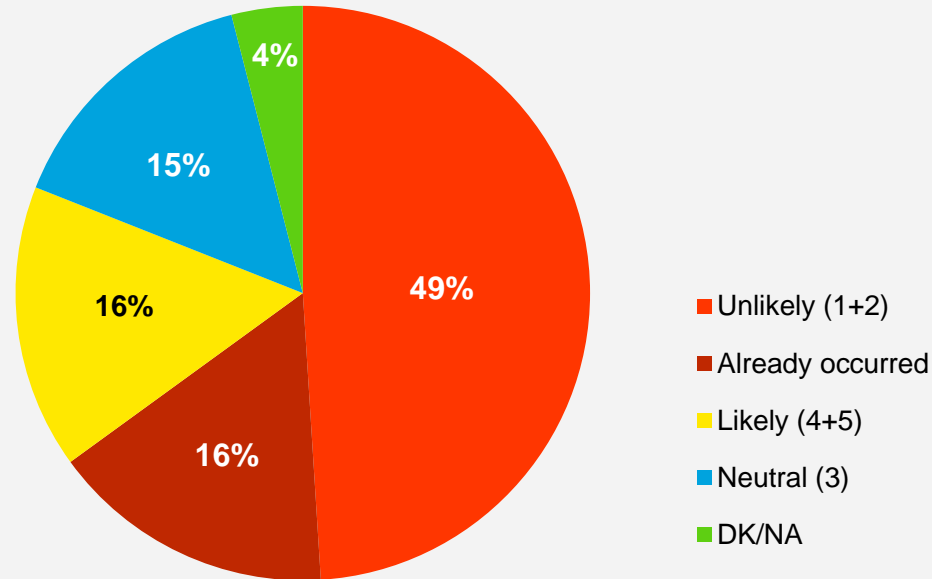
% of Experts, Very Important (5), 2019



**Question:** How important will the role of each of the following types of organizations be to making progress toward the goals of the Paris Agreement? Please use the 5-point scale provided (where 1 is “Not important at all” and 5 is “Very important”).

# On a path to irreversible climate damage?

**Question:** Rate the likelihood that progress toward addressing climate change will occur fast enough to avert major, irreversible damage to human, social, and ecosystem health. *Please use the 5-point scale (1 is "Very unlikely" and 5 is "Very likely" or choose "Already occurred.")*

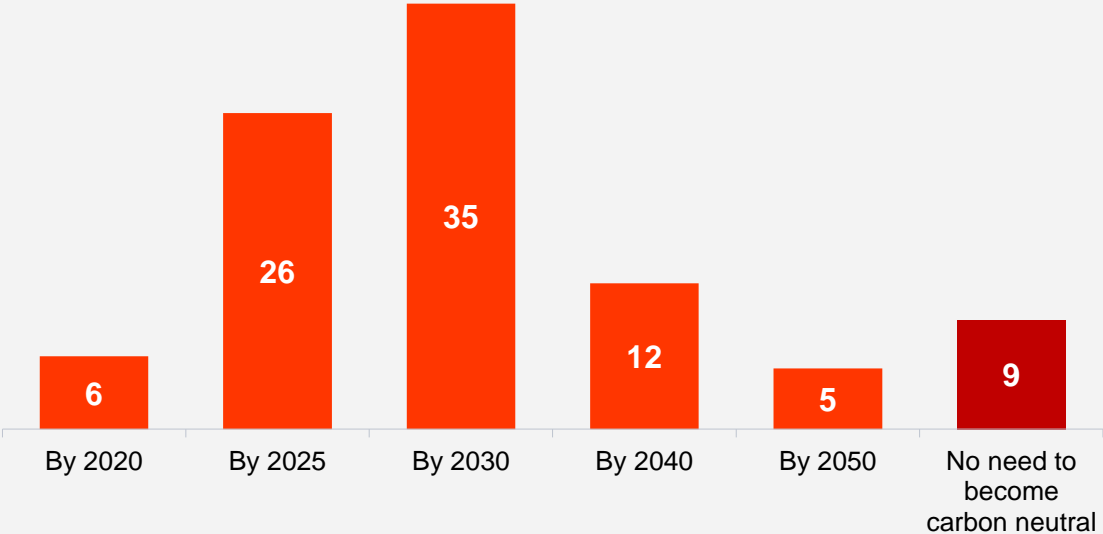


% of Experts, 2019



# Companies need to be carbon neutral by 2030, or sooner

**Question:** By what date do you think companies need to become carbon neutral (including through verifiable offsets) to remain competitive businesses?  
*Please pick one.*



% of Experts, Prompted, 2019



# Consequences of NOT addressing climate change

Most important material impacts on companies

% of Experts, Prompted, Total Mentions, 2019



**Question:** For large companies that are NOT adequately addressing climate change, which two of the following will have the largest negative impact on their revenue, profits and long-term growth? Please pick the two most important consequences from the list below in order of their importance..



## To summarize



- 1 A clear roadmap for corporate sustainability leadership
- 2 A relatively good, but uneven, response to COVID-19
- 3 More to do for our next collective battle: climate change

# Q & A

[www.globescan.com](http://www.globescan.com)



## Who we are: *The societal purpose which drives us*

### Building **trusted leadership** to create a better future

GlobeScan is an insights and strategy consultancy focused on **helping leadership organisations harness the power of their stakeholder network to create a better future.**

We are experts in identifying, understanding and engaging stakeholders and the general public all over the world. We have worked across more than 100 countries, conducting over one million interviews since our founding. We have unlimited reach to get the international insights and local context our global clients need.

Established in 1987, GlobeScan is an independent, employee-owned company with around 45 team members, and offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto.



# Who we work with



# What we do: *Our core service offerings*

## Inform



**Understand what matters most – now and in the future**

GlobeScan works with you to identify, map and engage your stakeholders, to inform you as to what they think and how they act. We apply a rigorous approach that includes qualitative and quantitative techniques to provide the evidence you need to understand your context and build stronger relations with your stakeholder network.

## Advise



**Activate change through strategy and planning**

GlobeScan takes an insights-led approach to develop strategies for your positioning, performance and policies to build enduring value for your organisation and for society. We are long-term partners and advisors to help you become a more trusted leader through the integration and optimisation of purpose and reputation across your organisation.

## Connect



**Identify who to engage for impact, and how**

GlobeScan designs and facilitates stakeholder engagement strategies and tactics to create more value with your stakeholders, including stakeholder convenings, online and offline collaborations, webinars, advisory panels and thought leadership development.

# What we do: *Our core service offerings*

## Inform



- Proprietary contextual insights: public opinion and stakeholders
- Landscape and issues review
- Benchmarking and competitive intelligence
- Qualitative research
- Quantitative research and analytics
- Social media insights integration

## Advise



- Strategy and alignment workshops (internal/external)
- Strategy, positioning, communications planning, and messaging development
- Materiality analysis and leadership platform development
- Ongoing retainer support

## Connect



- In-person stakeholder meetings, salons, and roundtables
- Online collaboration forums via proprietary platform
- Webinars tailored for key audiences
- Joint thought leadership
- Partnerships and engagement



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# THANK YOU

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