
The FutureBrand Super-Sustainability Report

A FutureBrand Index Special Report

**How will your company
respond to the
new sustainability agenda?**

*An introduction
to 'Super-Sustainability'
and its potential impact on the
future of business.*

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This paper looks at how the events of 2020, which included other traumas beyond the pandemic, have redefined public expectation of companies at a time when the relationship between profit and growth has never been more nuanced and complex. Inevitably, this means revisiting the subject of sustainability that feels both screamingly urgent and ever more detached from our everyday lives.

It has been
consciously designed
to help company
leaders understand
the potential impacts
of the universal fears
and worries that
2020 triggered, to see
sustainability in a
new, broader context
and to identify the
right challenges and
opportunities that
change at this scale
always brings.

Naturally, we take a brand-led view, believing as we do that brand is the behaviour-shaping lever that offers leaders a uniquely multi-dimensional view of the organisation so it is best-placed to push beyond historic and conventional ways of thinking and doing.

We draw on our own proprietary research and data, most notably the FutureBrand Index¹, as well as the likes of The Economist, Forbes, McKinsey & Company, Salesforce and KPMG.

¹ <https://www.futurebrand.com/futurebrand-index>

02

Sustainability vs. Super-Sustainability

“So many issues
came together in
2020, not least
the rising influence
of the Black Lives
Matter movement
and the Covid
pandemic”

*Marvin Chow,
Vice President of Global Marketing at Google*

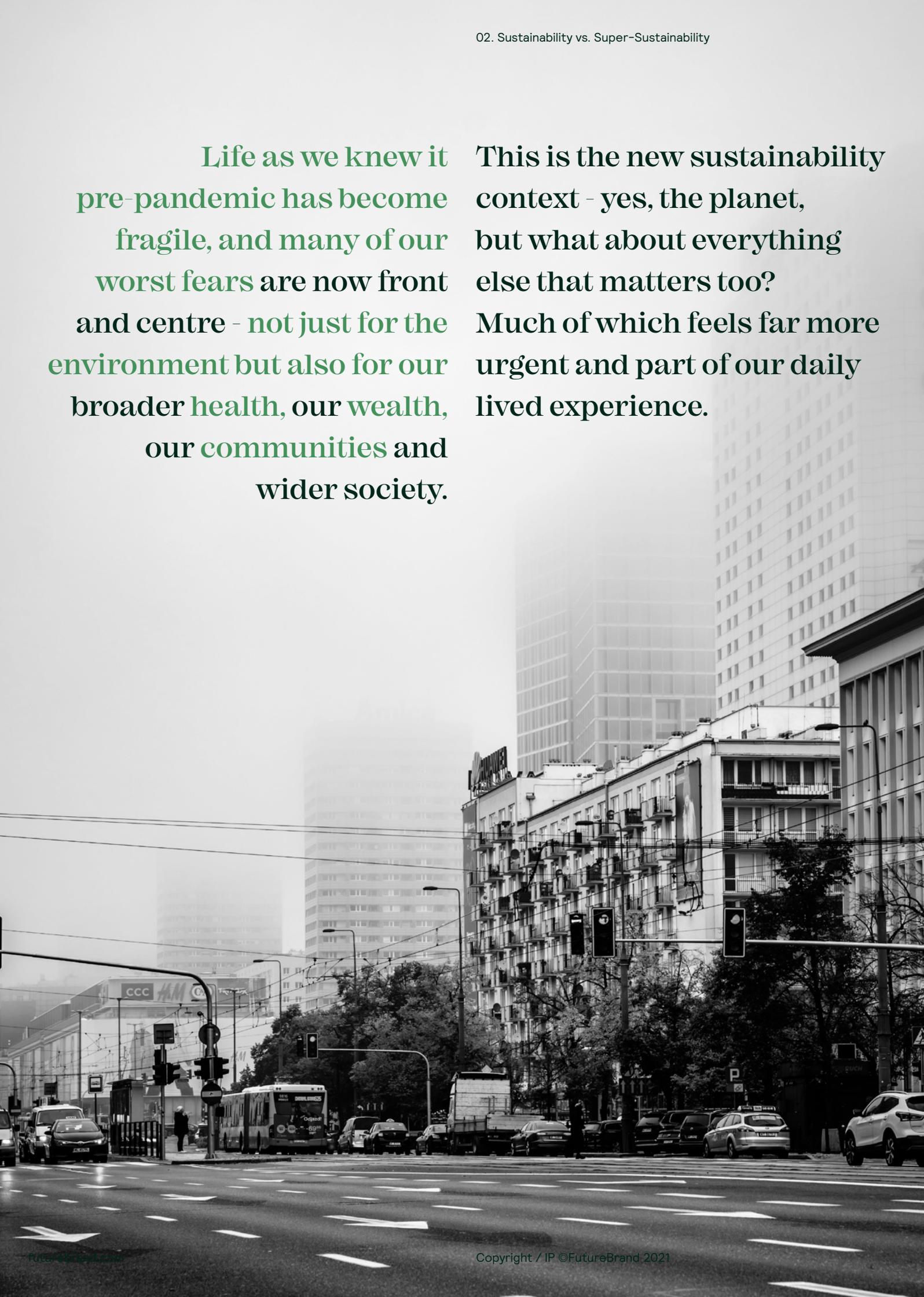
2020 was supposed to be the year of sustainability but the COVID-19 pandemic struck and our collective focus naturally shifted. While far from over, for many of us there is now some light at the end of the tunnel and attention is again focusing back on sustainability – **but through the ‘experience lens’ of 2020.**

2020 super-charged public worry for the maintenance of life as we know it, as our worst fears were escalated and conflated. It became plain to most that pandemics kill livelihoods, industries and hope as much as they kill people and threaten our children’s futures. It also became clear in 2020 that social and political unrest damages institutional trust and destroys communities as much as public property and that climate change is about far more than just climate, as White House National Climate Advisor, Gina McCarthy, noted [on 30th January this year] that: **“Climate change is a racial justice issue”**.

² <https://www.forbes.com/sites/jonquilhackenberg/2019/11/28/2020-will-be-the-year-of-sustainable-business/>

Life as we knew it pre-pandemic has become fragile, and many of our worst fears are now front and centre - not just for the environment but also for our broader health, our wealth, our communities and wider society.

This is the new sustainability context - yes, the planet, but what about everything else that matters too? Much of which feels far more urgent and part of our daily lived experience.





The model above is how we, at FutureBrand, think about the prevailing context in which people make decisions. Whether more rational or more emotional, people seek to manage and resolve the tensions and preoccupations that modern life throws at them.

What's new is how these concerns are becoming much more heightened, much more nuanced and much more interconnected. It used to be a business's goal to provide products and services that were, for example, stylish (status-orientated) and low carbon (environmentally-orientated). This was what sustainability looked like pre-2020 and Tesla and Nespresso are two obvious examples of this in action. It's just that this won't be enough moving forward because this is what is now expected by consumers as a bare minimum and is therefore unlikely to create long-term distinction and differential value.

To take advantage of the opportunities that lie ahead of us, businesses must reframe sustainability beyond concerns for climate to the whole of human well-being. This is what it means to be Super-Sustainable.



While many of the core tenets of historic concerns around climate change of course remain, in a post-pandemic world these lines of thinking must be elevated into a far more multi-dimensional sustainability agenda that 'catches sustainability up' with where the public is already moving. At its core, a Super-Sustainable business encompasses all of this existing thinking, and super-charges it for a new era.

As a result, a Super-Sustainable business creates, supports and exhibits the behaviours and practices on which human well-being can be maintained and extended, climate and beyond.

These are the businesses that, alongside positive environmental moves, will also deliver on trust and consistency, care about the quality and progress of their people, thought lead, bring pleasure, make themselves indispensable in product, service and experience, deliver with distinctiveness and include and elevate all those they touch.

To meet these new expectations – and bring about a genuinely sustainable future for all – it will not be enough to deploy old methods and established thinking.

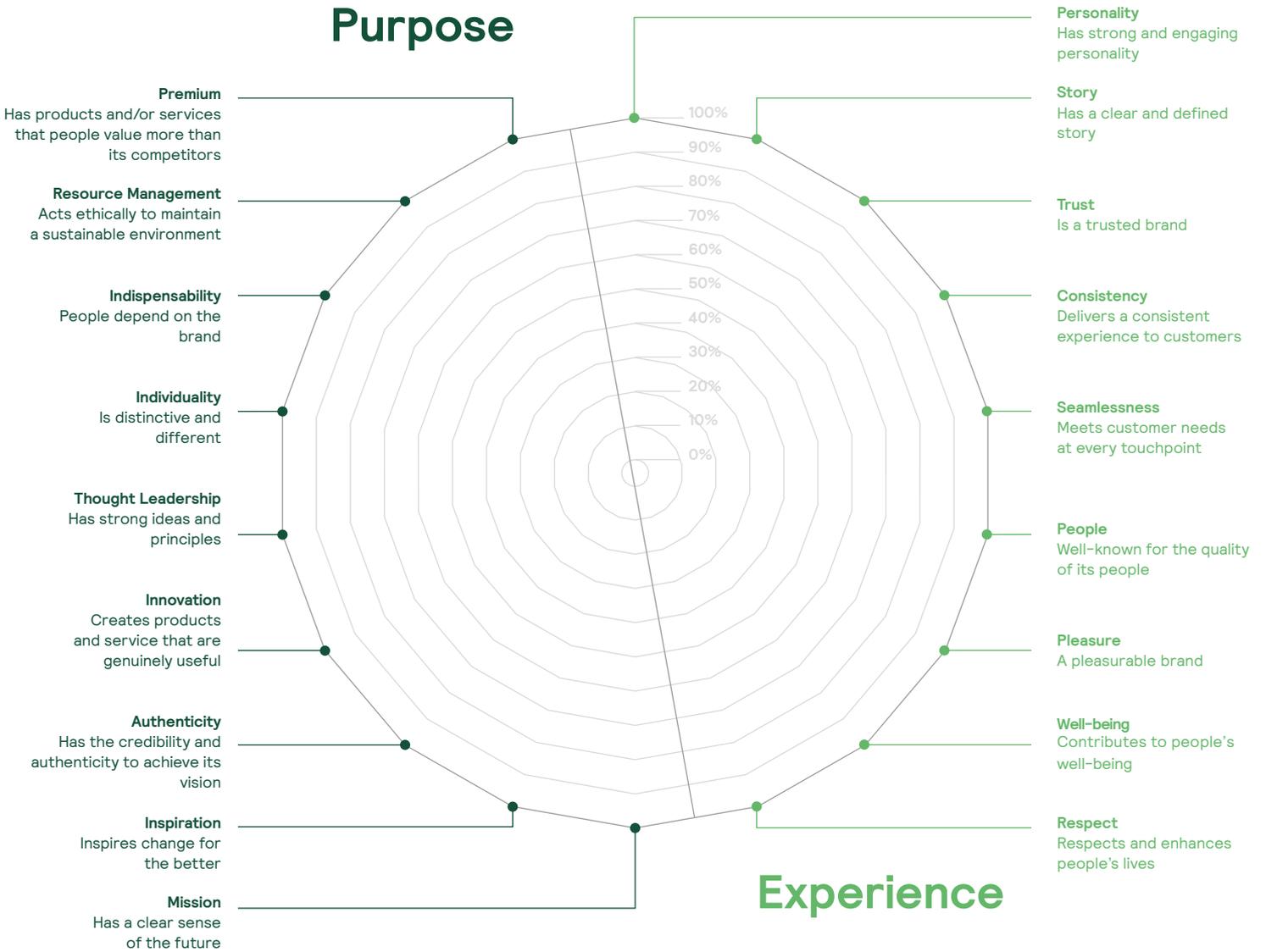
This is fundamental change. It requires a fundamental redirection of focus from sustainability to, what we at FutureBrand are calling, ‘Super-Sustainability’.

Where a sustainable business once focused on meeting expectations along environmental lines, businesses of the future will push beyond it to meet a far broader set of human wants and needs. After all, lower impact supply chains and greener energy, while vital, are surely now a given for people who have looked into the abyss and are expecting considerably more from those with whom they decide to spend their time and money.

So, which companies today are best-placed to lead the charge into this new future?

03

Modelling Super-Sustainability



The FutureBrand Index Perception Map

By looking at some of the world's most prominent companies through the **FutureBrand Index**³, we can begin to benchmark the most Super-Sustainable today.

Based on the perceptions of an informed global public of professionals, the FutureBrand Index evaluates the world's most prominent companies⁴ across 18 detailed attributes and by 6 dimensions. These include those that point towards environmental/purpose-orientated considerations as well as taking in broader criteria such as trust, innovation, respect for employees and human well-being.

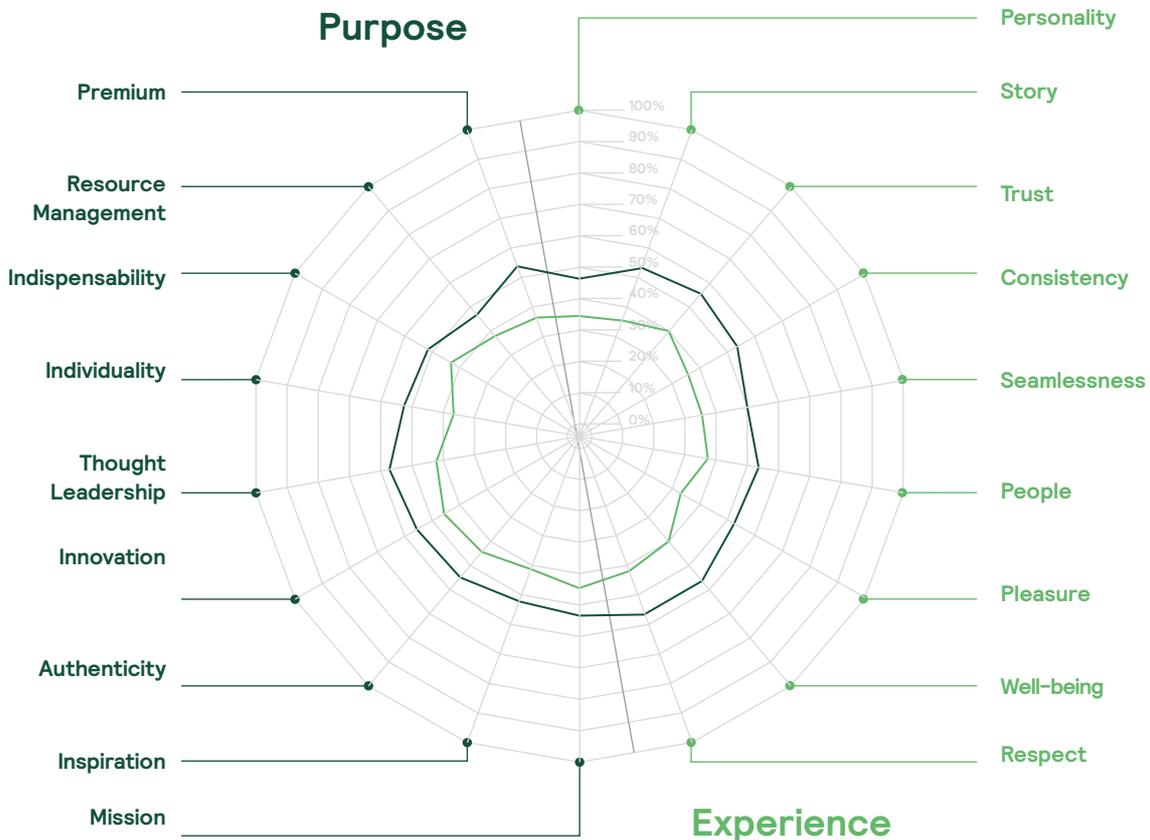
³ <https://www.futurebrand.com/futurebrand-index>

⁴ Based on the PWC Top 100 companies by market capitalisation <https://www.pwc.com/gx/en/services/audit-assurance/publications/global-top-100-companies.html>

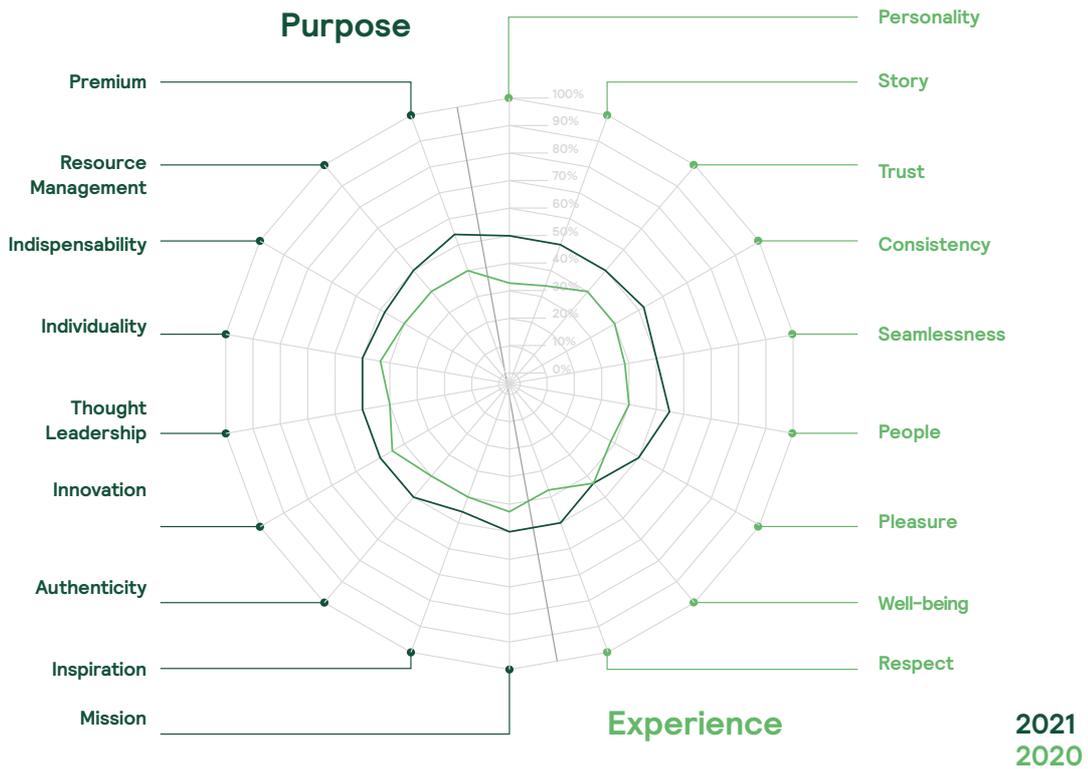
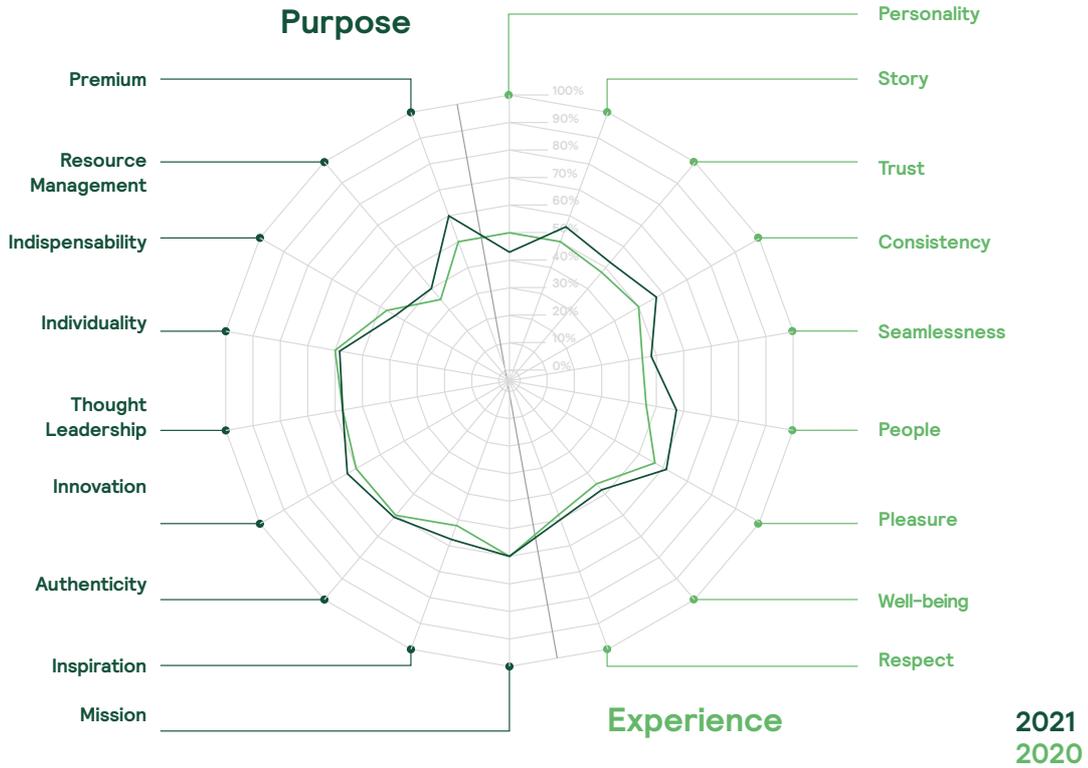
In 2021, the highest performing companies are technology companies – ASML Holdings, Apple and Prosus NV. In each case, consistency across all measures has been critical to their success, especially for the former and latter which, for many, might be somewhat of a surprise. ASML, in particular, is a fantastic example of a company that appears to have an eye on becoming future-proof through a Super-Sustainable approach.

As a specialist technology company, it is reasonable to expect strong perception performance on attributes like innovation, indispensability and the quality of its people, but this is a photolithography systems company that also brings pleasure, contributes to human well-being and has a great story, to name but a few. This cross attribute performance is the key to meeting the diverse demands and expectations of today’s public and, right now, this company is out in front – even ahead of the mighty Apple.

ASML

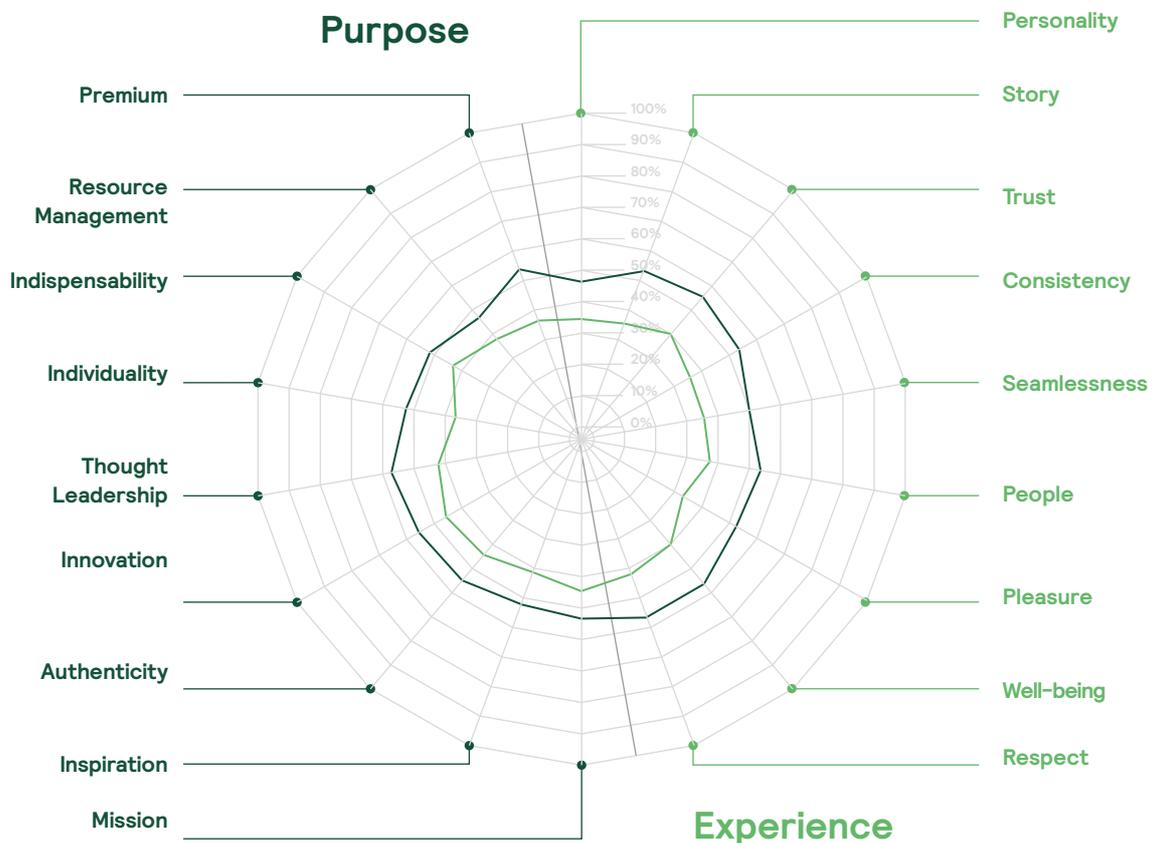


2021
2020

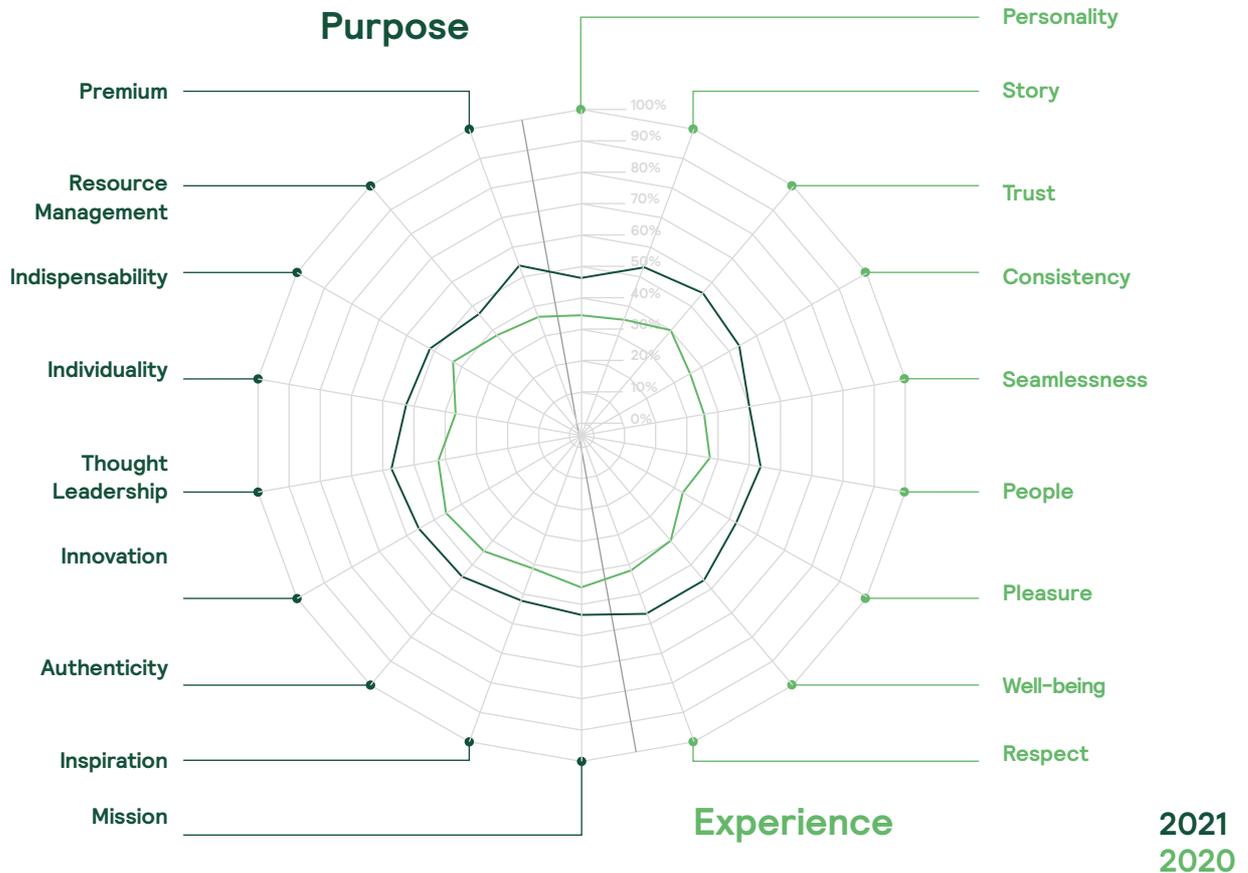


Another company worthy of comment is **Saudi Aramco**. Since its partial IPO, perceptions of the oil and gas powerhouse have 'rounded out' markedly. As with ASML, Apple and Prosus, it's the company's ability to drive brand perceptions not typically associated with its sector that is most impressive and that suggest Super-Sustainable potential. Providing a sense of inspiration and pushing its mission alongside a renewed personality and story are not perhaps what one might have expected to see in just over 12 months since we first benchmarked the company. This clearly suggests what the public might be looking for and wants to reward in the companies in which it decides to spend time and money.

أرامكو السعودية
Saudi Aramco



2021
2020

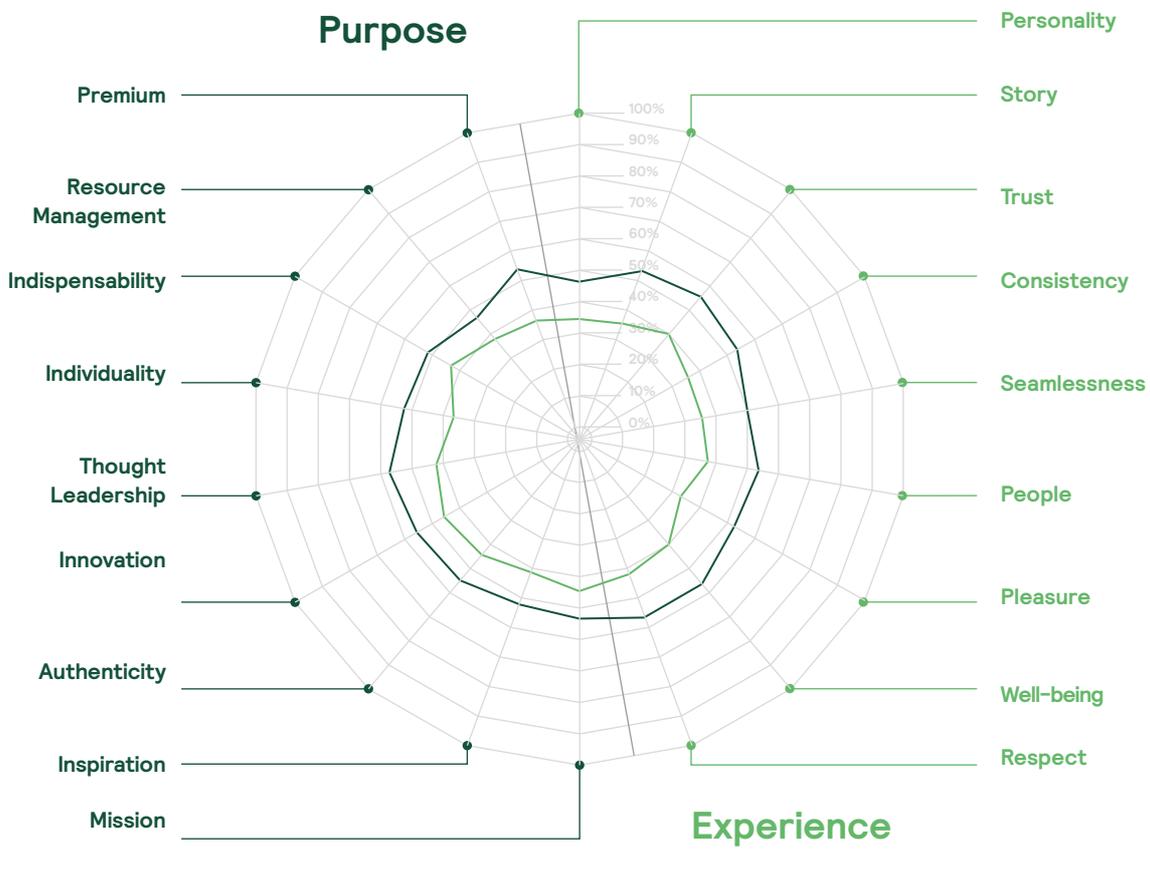


Another high performer this year is **Danaher Corp.** After a strong debut in 2020, the company has progressed again to become the highest placed healthcare company in 2021's FutureBrand Index. What's especially noteworthy, from a Super-Sustainable perspective, is how a health company has grown its associations with personality, story and pleasure almost as much as mission, thought leadership and authenticity – which, again, are associations perhaps more naturally connected to the provision of healthcare solutions and

Looking into the consumer staples space, P&G has significantly risen up our ranking with positive moves across the board and in particular around innovation and story where perhaps its everyday, familiar products and services might previously have struggled to register.

In all of these examples, that come from wildly different sectors, the one thing they all share is consistent performance across a wide range of attributes, not just those that are more readily associated with their respective sectors.

This is the key to achieving Super-Sustainability where positive environmental associations of course matter, but not any more so than many others when it comes to attending to the totality of human well-being.



Why this matters, now.

This 'old' way of living and operating is already being reshaped. Across the globe, this repositioning has already begun. The pandemic forced governments, businesses, communities and individuals to come together and transform seemingly intractable situations into opportunities for collaboration and innovation, all at record speed and never-been-seen agility.

As we consider the post-pandemic world, it feels increasingly likely (and perfectly reasonable) for the public to demand that these collaborative approaches be applied to more mundane needs and challenges.

This collaborative, 'everyone-wins' way of working offers hope for a new public/private contract where the most future-proof and sustainable businesses change the way they think from making as much profit as they can for themselves and shareholders to taking modest fees for benefitting the many and improving lives and society. The opportunity to simultaneously transform corporate reputations is also obvious.

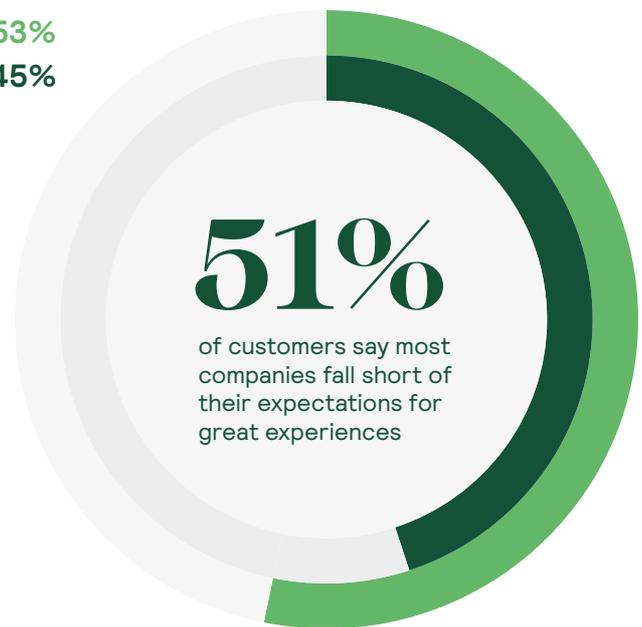
This isn't just a nice-sounding aspiration. 2020 has created a new tier of public expectation of business and government that is more diverse and more uncompromising than before. According to Salesforce⁵, 67% of customers say "their standards for good experiences are higher than ever" while, at the same time, 51% say "most companies fall short of their expectations". **Businesses will need to rise to this new reality.**

Consumers
Business Buyers

64%
73%



53%
45%



What's more, people have come to realise that a genuinely sustainable future will be made up of a myriad of needs, old and new, and they aren't prepared to wait for them. For example, in the wake of the proposed voter suppression rule changes in Georgia that drew in corporations as varied – and previously uninvolved – as Delta Airlines and Coca-Cola, The Economist noted that: "As more citizens want firms to support causes they hold dear, CEOs who remain silent risk being accused of complicity".

⁵ <https://www.salesforce.com/au/blog/2018/06/new-report--5-ways-businesses-can-meet-expectations-of-the-conne.html>

“As more citizens want firms to support causes they hold dear, CEOs who remain silent risk being accused of complicity”.

The Economist



04

The Brand Imperative

For managers to meet the new challenges of this new Super-Sustainability era, a brand-led approach is essential. Trying to navigate and deliver such complexity without the organising framework brands bring is truly daunting, even where, say, an iconic founder/leader remains. Corporations are diverse entities after all and need the common purpose and focus that only brand-centric organisation brings.

For us at FutureBrand, brand is behaviour – literally how an organisation’s products, services and people act and turn up in the world – and it can be established, directed, measured and redirected.

The FutureBrand Index model helps us help businesses do just that by identifying and tracking where a company is already strong and what needs to be prioritised moving forward and over time.

What’s more, the FutureBrand Index has helped us identify 5 behaviours of a Super-Sustainable business, regardless of sector or geography:

- 1. They transform purpose promises into clear platform infrastructures that will be fundamental to human life in the future**
- 2. They align every experience in service of their purpose platform**
- 3. They prize individuality over differentiation**
- 4. They are consistently surprising, when very few are**
- 5. They innovate and experiment**

These behaviours apply to any business, not just the most prominent, and can be measured and tracked over time⁶.

⁶ <https://www.futurebrand.com/futurebrand-index-2020/tools-comparison/score-your-brand-1>

05

Summary

As we move past the pandemic emergency and other acute pressures of 2020, a renewed focus on sustainability is imminent – driven by public expectation and the normalisation of the ESG investment framework agenda. This, in turn, will hasten a broader, deeper and more nuanced sustainability context and business has a great opportunity to extend its thinking and doing to stay relevant and thrive.

Brand is the critical behaviour-shaping lever that offers managers an essential multi-dimensional view of the organisation so it is best-placed to push beyond traditional and current approaches to sustainability and become Super-Sustainable.

Without a brand-led approach, missed opportunities and misalignments with a rapidly diversifying public are both more likely and will be more costly. More positively, the rewards for those with the vision and agility to deliver in this new era are greater than ever before as new consumer behaviours and habits emerge and become permanent.

The FutureBrand Super-Sustainability Report

About FutureBrand

FutureBrand is a world-leading brand transformation company.

With offices across the world, we unite global experts in strategy, design and innovation to future-proof businesses and countries through brand experiences that drive profitable, long-term growth.

futurebrand.com

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