

GlobeScan-SustainAbility Survey

Temperature Check: Ensuring SDG and Paris Agreement Success

November 2022



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Introduction

This publication presents findings from the latest GlobeScan / SustainAbility Institute by ERM Survey. Open from September 27th to October 28th, our survey crowd-sourced insights from 215 sustainability experts across 41 countries. Respondents provided input on perceived progress toward the United Nations Sustainable Development Goals (SDGs) and how to best move forward to ensure Paris Agreement success. Sustainability professionals from corporate, academia, NGO, and other sectors were asked to weigh in on the solutions that they see as the most effective in addressing the climate crisis and the greatest challenges their respective regions face in terms of achieving a just transition.

These findings come at a pressing time. While the Decade of Action as proclaimed by the UN is well underway, progress on sustainability-related challenges seems to have slowed or even stopped. The global pandemic, rising inflation, geopolitical tensions, and myriad other issues have hindered the public and private sectors' ability to act on issues like curbing emissions, transitioning to renewable energy, and addressing social injustices.

Results from this GlobeScan / SustainAbility Institute by ERM Survey echo this sentiment, indicating that many experts still rate progress on the SDGs as poor and find progress on many critical issues to be too slow. Encouragingly, however, expert views on the climate solutions that will have the most impact align well with those that can be implemented at scale. And though they recognize there is much work to be done to achieve a just transition, experts across geographies tend to agree on the most significant challenges to achieving this Goal.

While findings indicate alignment on which climate solutions have the highest potential to address one of the most urgent SDGs, experts agree that more action and faster implementation is needed to make further progress on all of the SDGs and to achieve a just transition. For significant progress to be made, it will truly need to be a Decade of Action.

Sustainable Development Goals

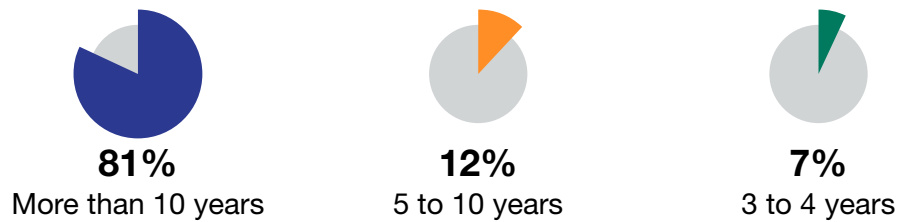


Survey Methodology

A total of 215 qualified sustainability experts completed the online questionnaire from September 27 to October 28, 2022. The survey was offered to respondents in Arabic, Chinese, French, Portuguese, and Spanish, in addition to English.

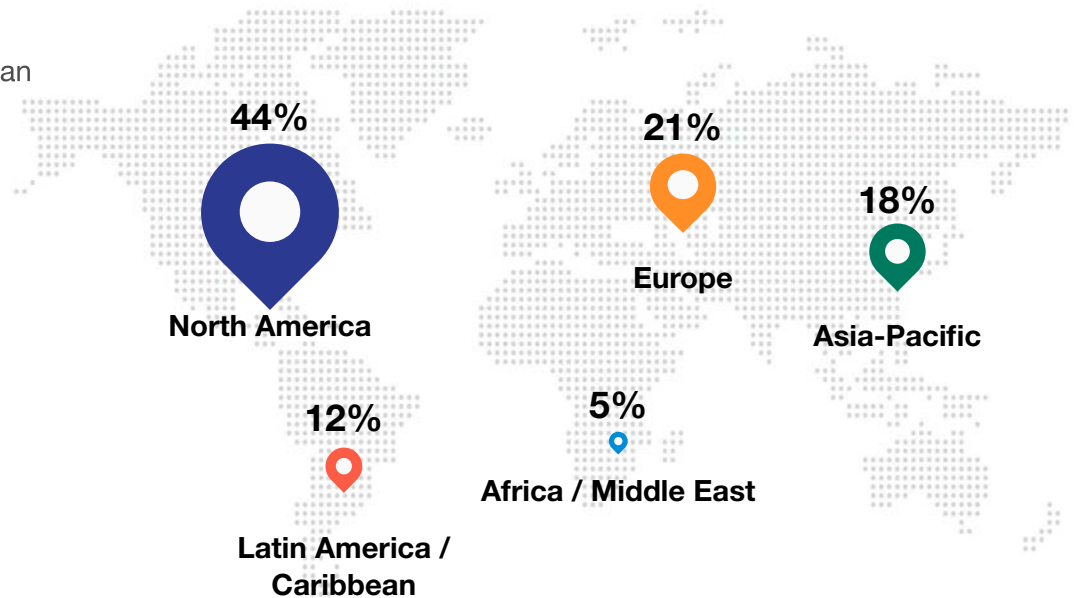
Experience

Respondents have the following experience working on sustainability issues:



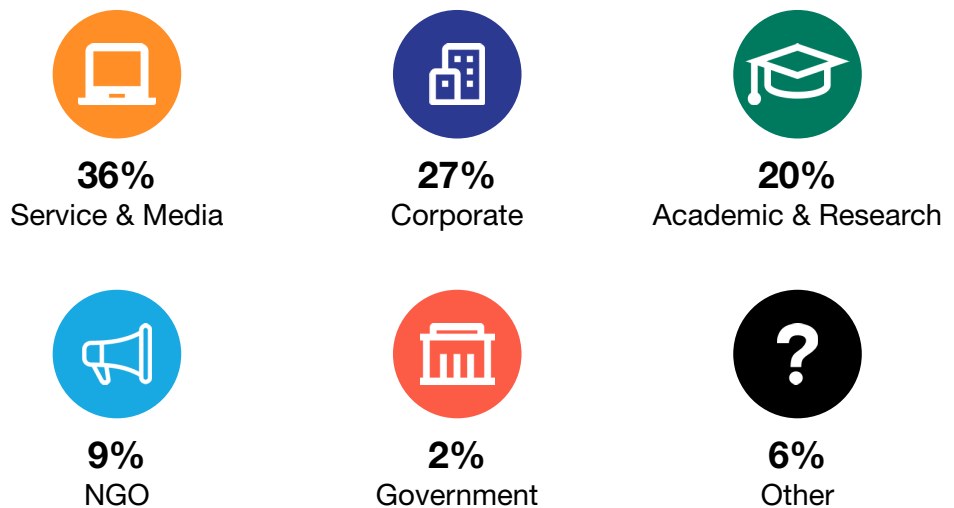
Geography

Experts surveyed span 41 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Key Findings



- ▶ **Sustainability experts continue to rate society's progress on the SDGs as mostly poor.** Experts are most likely to say society's advancement has been good on *Partnerships for the Goals*, while progress on *Reduced Inequalities*, *No Poverty*, and *Life Below Water* is rated most negatively.
- ▶ **Climate Action continues to be viewed by experts as the most urgent Goal.** When asked to select the three Goals that require the most urgent action, almost two-thirds of experts (65%) choose *Climate Action* – up 4 points from 61 percent two years ago. This is followed by *Zero Hunger* (24%, up 6 points from 2020), *No Poverty* (23%, up 4 points from 2020), and *Reduced Inequalities* (22%), highlighting the growing importance of socially oriented Goals. Alarming, those Goals that are seen as most urgent are perceived as having made the least progress.
- ▶ **Respondents say that increasing the development and generation of renewable energy is the most effective climate solution.** Eight in ten experts (81%) believe that increasing renewable energy is an effective potential solution to address climate change, followed by sustainable agriculture and food system solutions (67%), reducing deforestation (67%), and circular business models (60%).
- ▶ **Increasing renewable energy is also thought to be one of the most viable climate solutions.** When asked how easy or difficult it will be to bring potential climate solutions to scale, experts cite activism by civil society and NGOs (62%), increasing renewable energy (57%), and subsidies, investments, and grants to promote low-carbon choices (53%) as the solutions that will be easiest to bring to scale. Geoengineering (13%) and carbon capture and storage (13%) are believed by experts to be the least viable solutions.
- ▶ **Experts say lack of political will is preventing a just transition in their countries.** Almost half of experts (49%) mention the absence of political will as a barrier to a fair distribution of the costs and benefits of climate action where they live, while many also mention existing inequities (22%), apathy (19%), and lack of awareness among the public as considerable barriers (18%).



Progress and Urgency of Individual SDGs



Progress on individual Goals seen as mostly poor

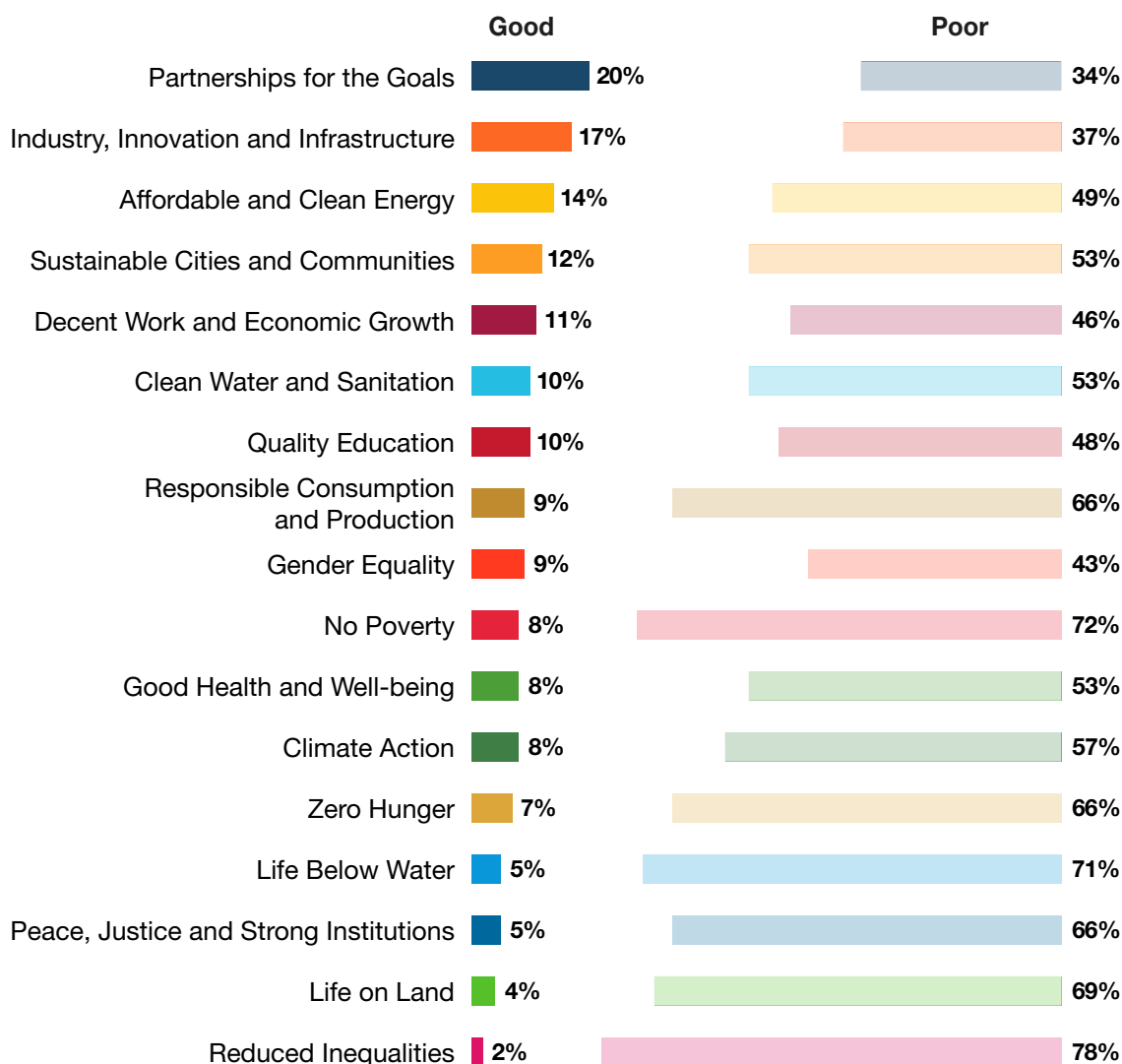
Progress on *Reduced Inequalities*, *No Poverty*, and *Life Below Water* are rated most negatively, while experts are most likely to say progress has been good on *Partnerships for the Goals*.



How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

Please use the 5-point scale provided where 1 is "poor" and 5 is "excellent."

% of Experts, All Respondents, 2022



Significantly fewer experts rate progress on *Gender Equality* positively since the pandemic began

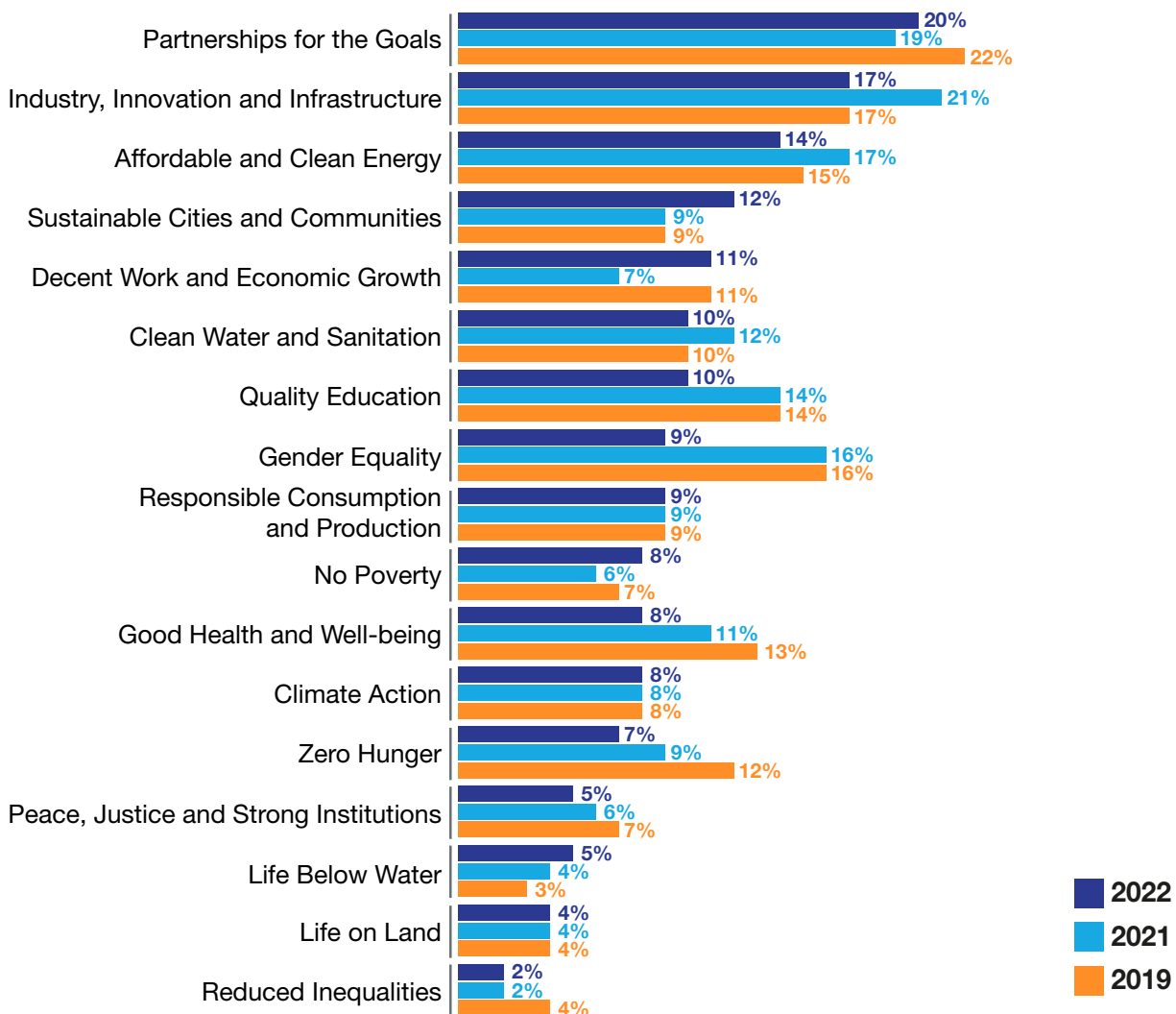
Compared to 2019 significantly fewer experts are now positive about *Gender Equality*, *Good Health and Well-being*, and *Zero Hunger*. *Sustainable Cities and Communities*, *No Poverty*, and *Life Below Water* are the only SDGs demonstrating some very slight improvement compared to 2019 and 2021.



How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

Please use the 5-point scale provided where 1 is "poor" and 5 is "excellent."

"Good" (4+5), % of Experts, All Respondents, 2019–2022



Experts say *Partnerships for the Goals* has achieved the most progress

As in 2019, *Partnerships for the Goals* is seen by experts as having achieved the most progress, up from second place in 2021. *Decent Work and Economic Growth* has climbed from being ranked ninth in 2021 and 2019 to fourth in 2022. *Quality Education* has dropped in ranking from third in 2019 and fourth in 2021 to sixth in 2022, suggesting society is falling behind on this Goal.



How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

Please use the 5-point scale provided where 1 is "poor" and 5 is "excellent."

Rank Order Based on Mean Scores, All Respondents, 2019–2022

(most progress = 1)	2022 Rank order	2021 Rank order	2019 Rank order	Change (2019 to 2022)
Partnerships for the Goals	1	2	1	0
Industry, Innovation and Infrastructure	2	1	2	0
Gender Equality	3	3	4	▲ +1
Decent Work and Economic Growth	4	9	9	▲ +5
Affordable and Clean Energy	5	5	6	▲ +1
Quality Education	6	4	3	▼ -3
Sustainable Cities and Communities	7	8	8	▲ +1
Good Health and Well-being	8	7	5	▼ -3
Clean Water and Sanitation	9	6	7	▼ -2
Climate Action	10	11	13	▲ +3
Zero Hunger	11	12	10	▼ -1
Responsible Consumption and Production	12	10	12	0
Peace, Justice and Strong Institutions	13	13	11	▼ -2
No Poverty	14	14	14	0
Life on Land	15	15	15	0
Life Below Water	16	16	16	0
Reduced Inequalities	17	17	17	0

▲ Change from 2019
 ▼

Climate Action remains the most urgent Goal

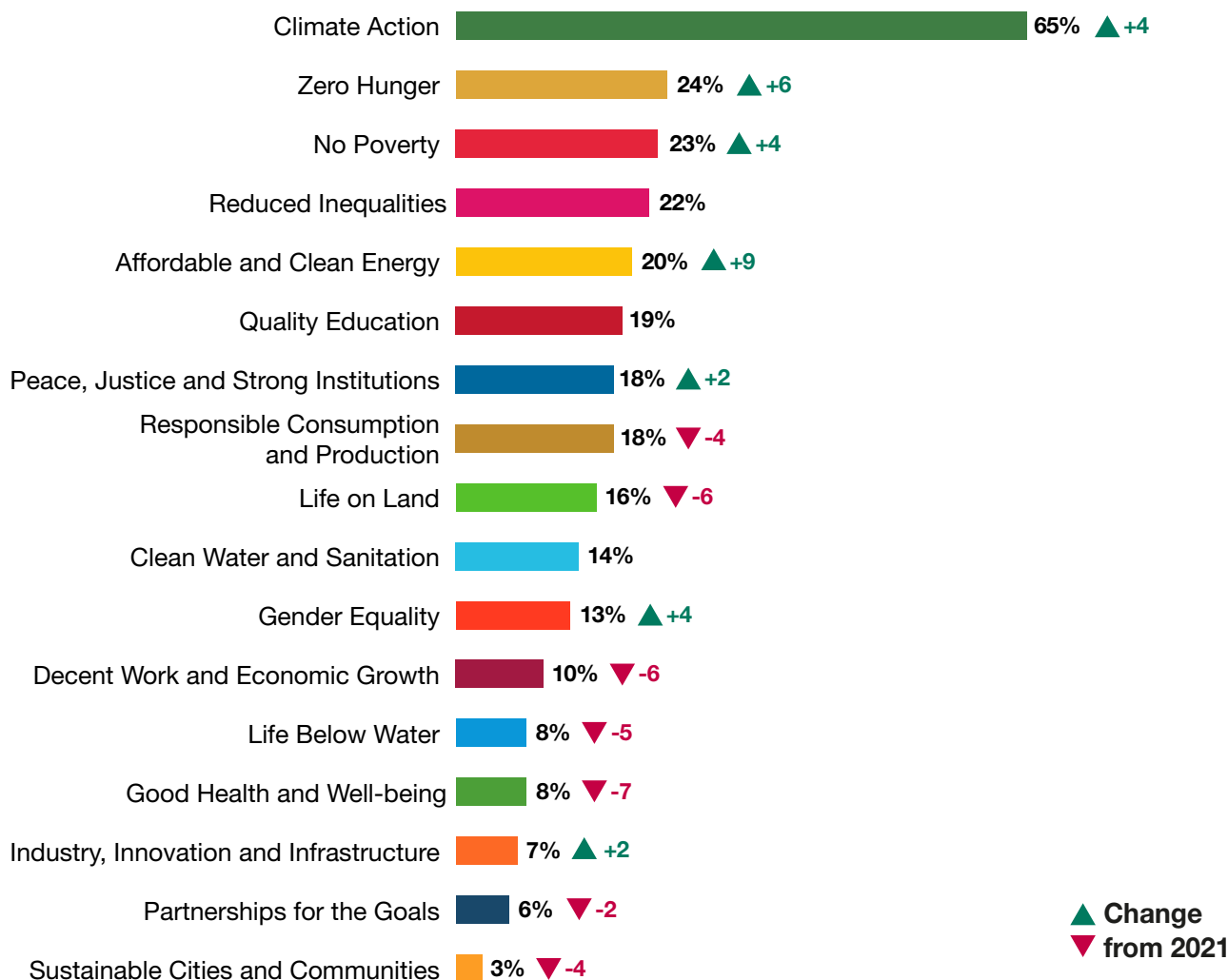
Two-thirds of respondents point to *Climate Action* as the most urgent issue to address. Despite being ranked as achieving the most progress, *Partnerships for the Goals* is seen to be among the least urgent.



Which three Sustainable Development Goals (SDGs) do you think require the most urgent action?

Please choose at most three Goals.

Most Urgent Goal, Total Mentions, % of Experts, All Respondents, 2022



Arrows and accompanying numbers to the right of each Goal represent the change in total mentions (% of experts) compared to 2021.

No Poverty is a priority Goal among experts in Africa / Middle East and Latin America / Caribbean

While *Climate Action* is considered one of the most urgent priorities among experts in all regions, those in the Global South rank *No Poverty* as most urgent. Respondents in Africa and the Middle East, as well as those in the Government sector, rank *Quality Education* as most urgent.



Which three Sustainable Development Goals (SDGs) do you think require the most urgent action?

Please choose at most three Goals.

% of Experts, Unprompted, Total Mentions, 2022



*Small sample size

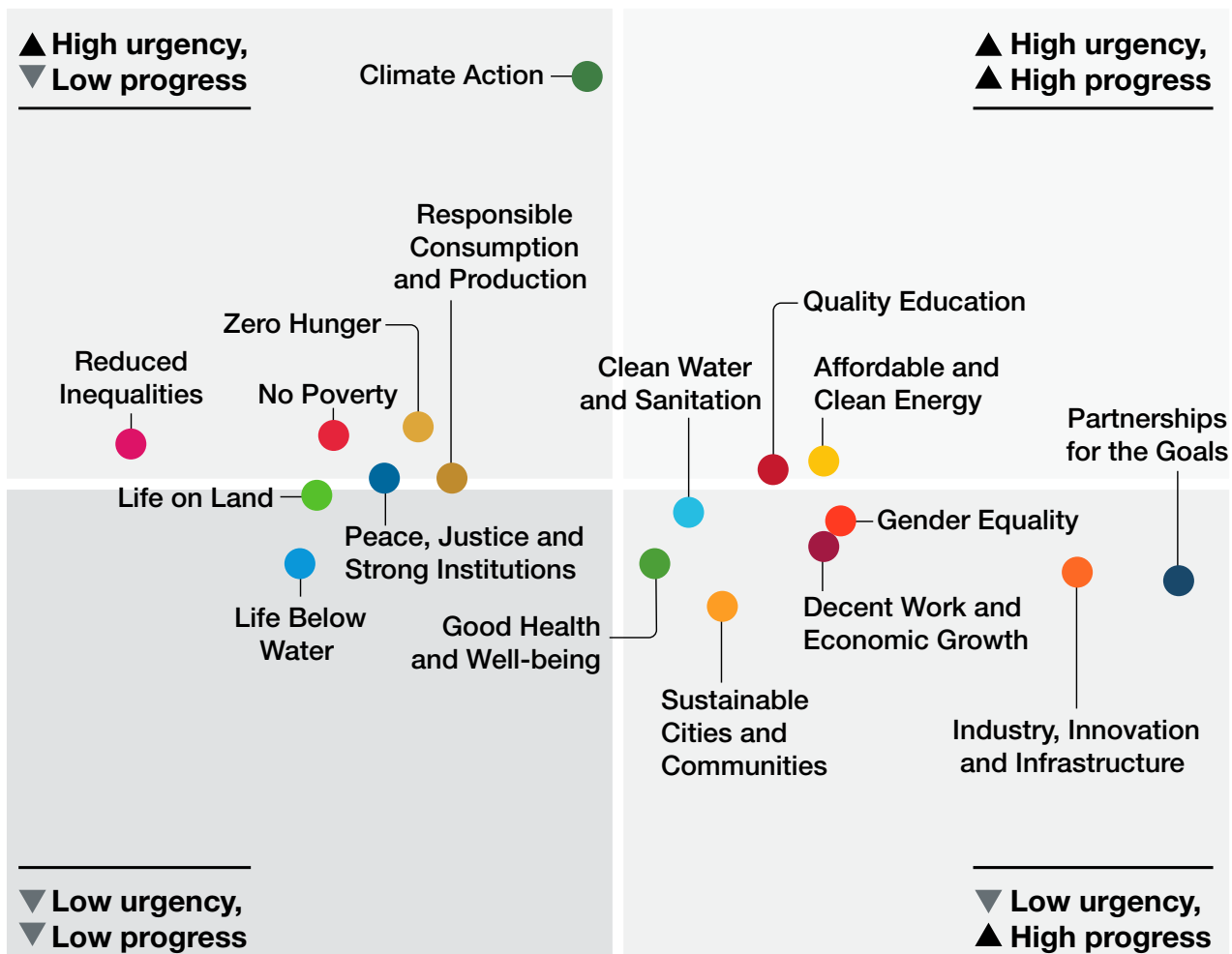
Goals perceived by experts as most urgent are also those where they see the least progress

As in previous studies, experts tend to view relatively less urgent Goals as having achieved the most progress while more urgent ones – like *Climate Action*, *Zero Hunger*, and *No Poverty* – demonstrate significantly less progress made.

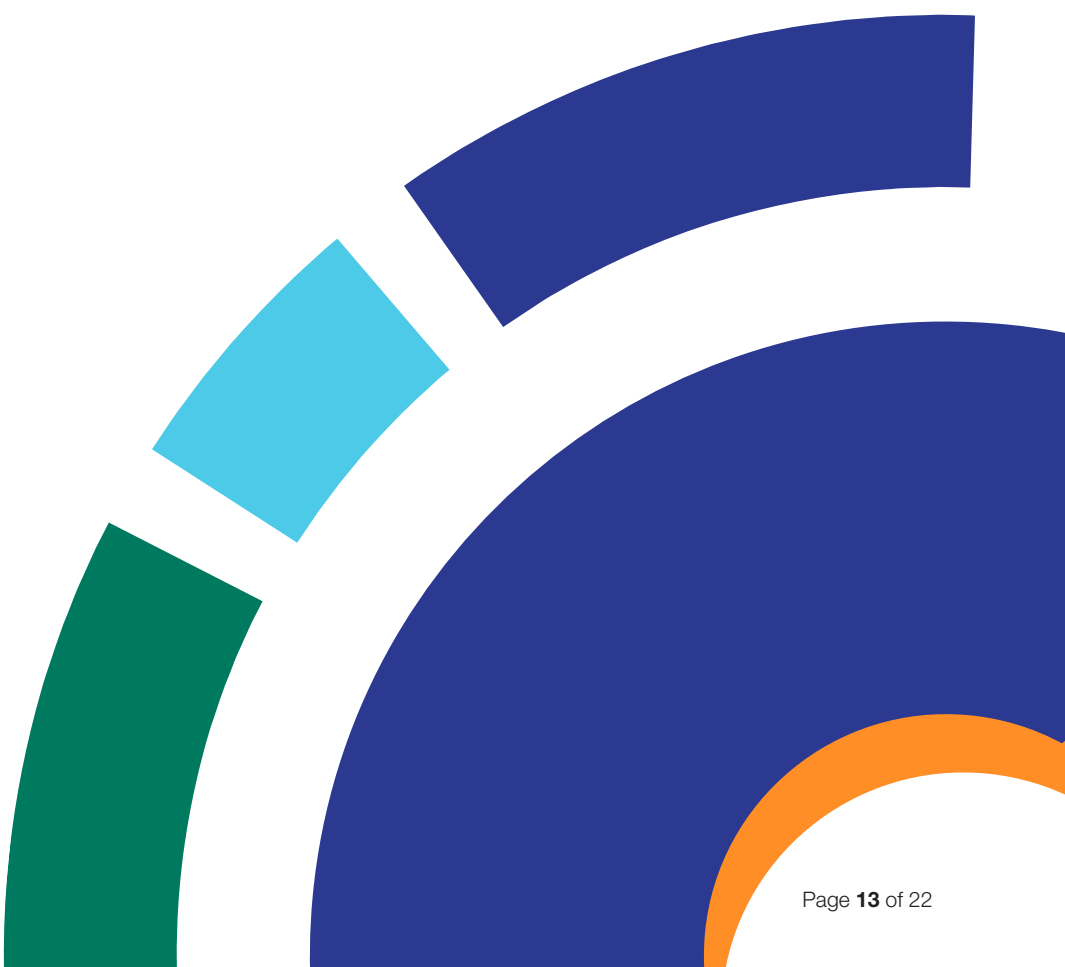


How would you rate society’s performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)? Which three Sustainable Development Goals (SDGs) do you think require the most urgent action?

Most Urgent Goal, Total Mentions, All Respondents, 2022



Effectiveness of Climate Solutions



Experts say increasing development and generation of renewable energy is the most effective climate solution

Experts also rate sustainable agriculture / food system solutions, reducing pace of deforestation, and circular business models as among the most effective solutions to address climate change.

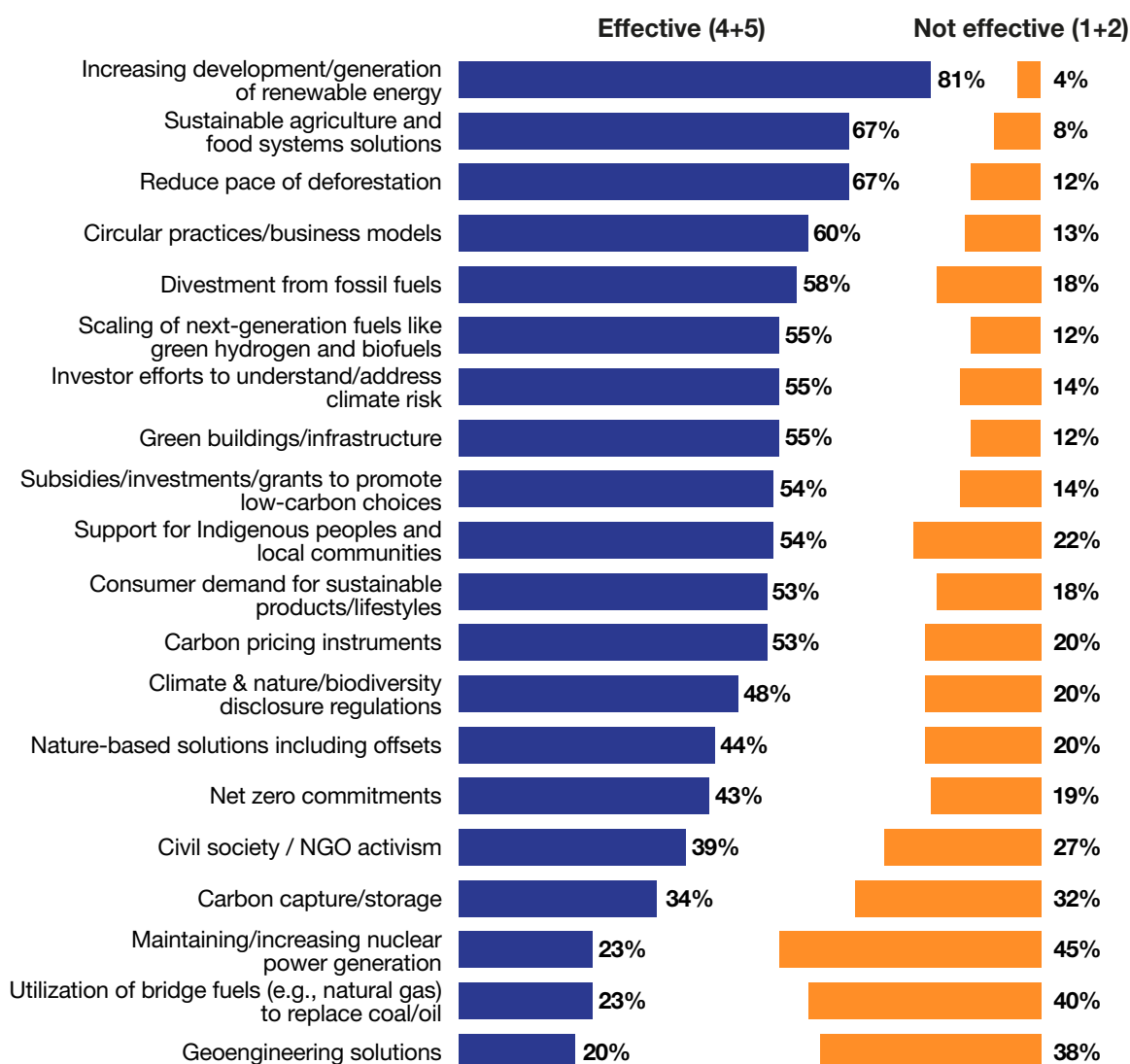
Utilization of bridge fuels, maintaining or increasing nuclear power, and geoengineering solutions are more often found to be “not effective” than “effective”.



As you know, there is an increasing focus on addressing climate change and there is a growing number of possible solutions. Please rate the effectiveness of each of the following potential climate solutions.

Please use the 5-point scale provided where 1 is “not at all effective” and 5 is “very effective” to bring to scale.

% of Experts, All Respondents, 2022



Civil society / NGO activism is viewed by experts as the easiest climate solution to implement at scale

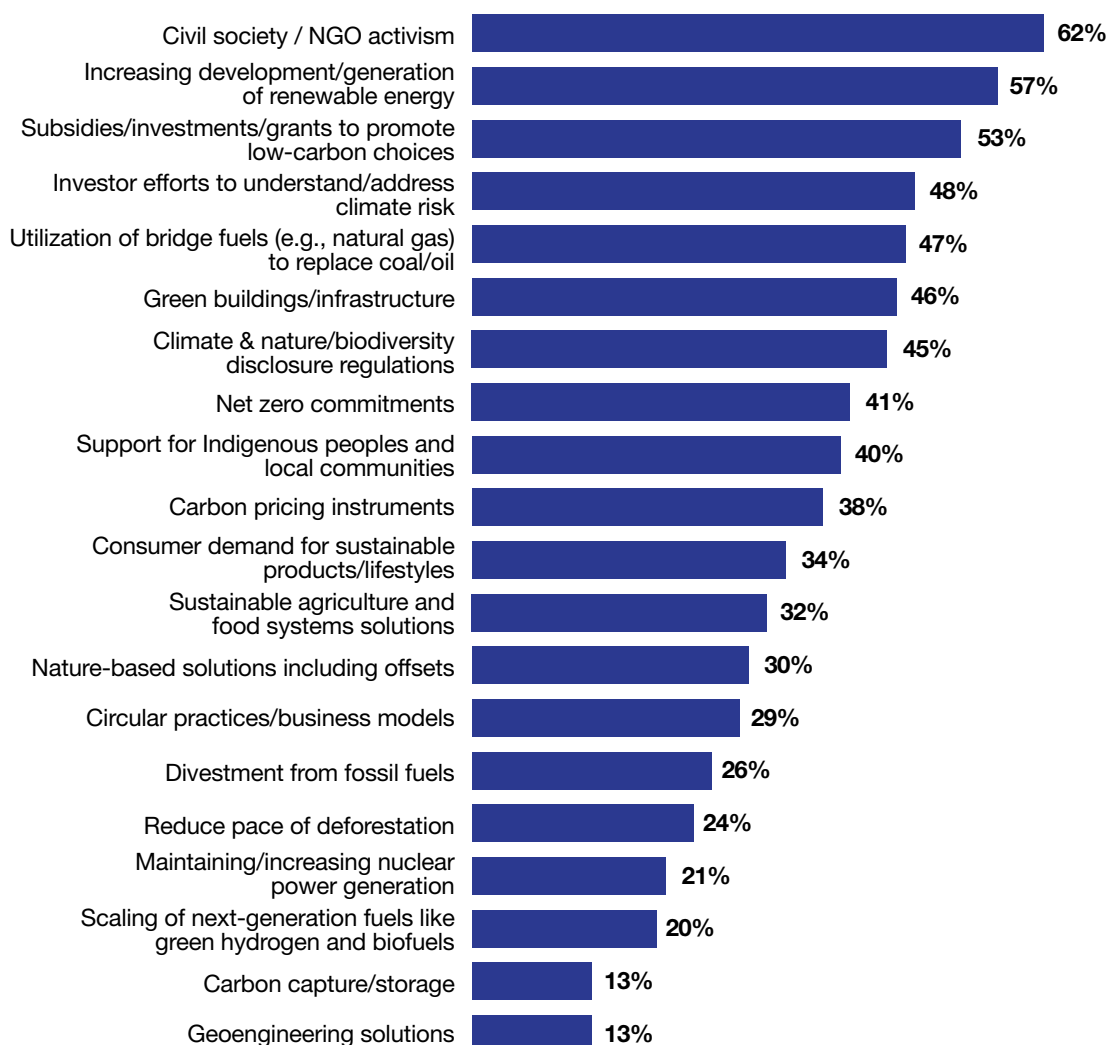
Experts also point to increasing renewable energy, and subsidies, investments, and grants to promote low-carbon choices as the most feasible climate solutions. Carbon capture and storage and geoengineering are considered the least viable at scale.



Some of these solutions will be more difficult to implement than others. Please rate how easy or difficult (time/resources/technical expertise, etc.) it will be to bring each of these climate solutions to scale.

Please use the 5-point scale provided where 1 is “very difficult” and 5 is “very easy” to bring to scale.

“Easy” (4+5), % of Experts, All Respondents, 2022



Experts say increasing renewable energy is both the most effective climate solution and among the most viable

Other solutions perceived to be both relatively effective and feasible to implement at scale include subsidies, investments, and grants to promote low-carbon choices, investors addressing climate risk, green buildings and infrastructure, supporting Indigenous groups and local communities, and carbon pricing.

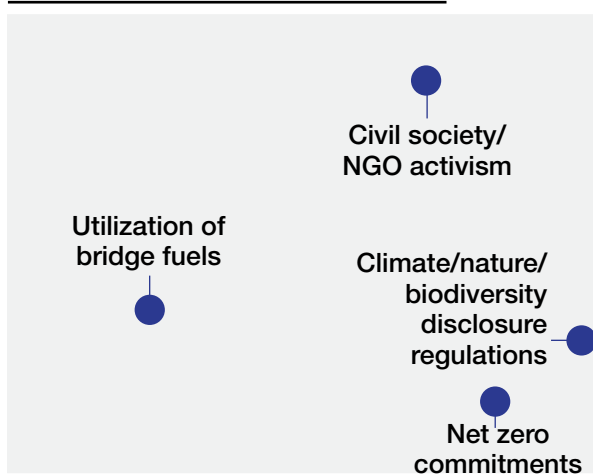


As you know, there is an increasing focus on addressing climate change and there is a growing number of possible solutions. Please rate the effectiveness of each of the following potential climate solutions.

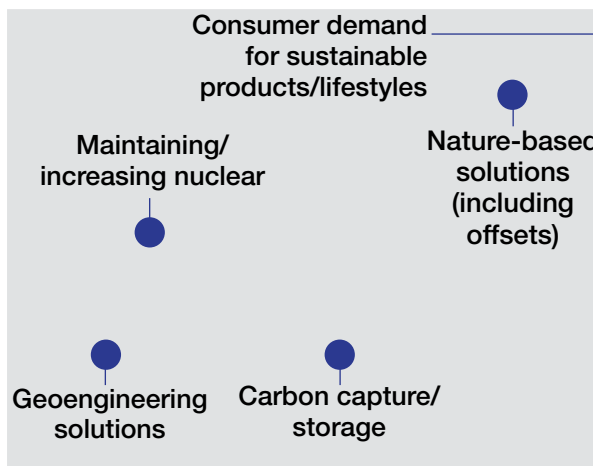
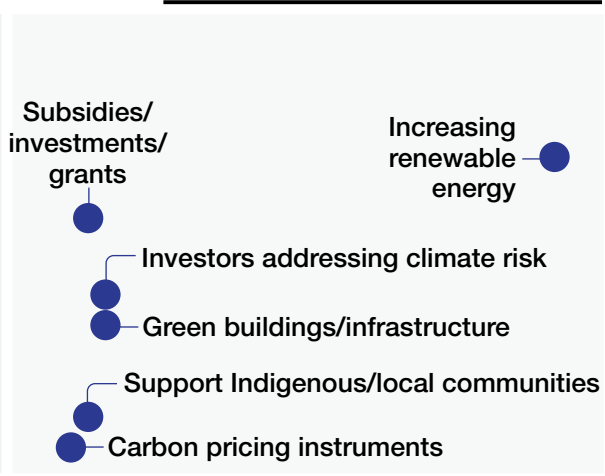
Some of these solutions will be more difficult to implement than others. Please rate how easy or difficult (time/resources/technical expertise, etc.) it will be to bring each of these climate solutions to scale.

All Respondents, 2022

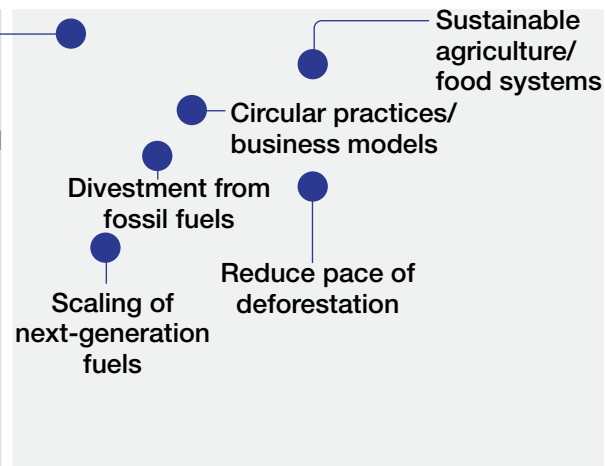
▲ High ease of implementation,
 ▼ Low effectiveness



▲ High ease of implementation,
 ▲ High effectiveness



▼ Low ease of implementation,
 ▼ Low effectiveness



▼ Low ease of implementation,
 ▲ High effectiveness

Civil society / NGO activism is ranked as a highly viable solution by experts in all regions and sectors

Experts in all regions also say increasing renewable energy is one of the easiest ways to address climate change where they live. However, experts in government and NGO sectors do not rank renewables in their top three most viable solutions.



Some of these solutions will be more difficult to implement than others. Please rate how easy or difficult (time/resources/technical expertise, etc.) it will be to bring each of these climate solutions to scale.

Please use the 5-point scale provided where 1 is “very difficult” and 5 is “very easy” to bring to scale.

% of Experts, by Sector and Region, 2022

	Easiest climate solution	2nd easiest climate solution	3rd easiest climate solution
Academic & Research	72% Increasing renewable energy	65% Civil society / NGO activism	58% Subsidies / investments / grants
Corporate	60% Increasing renewable energy	56% Subsidies / investments / grants	53% Civil society / NGO activism
Government*	75% Circular practices/business models; Civil society / NGO activism; Climate / nature / biodiversity disclosure regulations; Green buildings / infrastructure; Investors addressing climate risk		
NGO	79% Civil society / NGO activism	68% Green buildings / infrastructure	63% Utilization of bridge fuels
Service & Media	65% Civil society / NGO activism	56% Increasing renewable energy	53% Subsidies / investments / grants
Africa / Middle East*	70% Investors addressing climate risk	60% Increasing renewable energy	50% Civil society / NGO activism; Net zero commitments; Circular practices / business models; maintaining / increasing nuclear power
Asia-Pacific	51% Subsidies / investments / grants	49% Civil society / NGO activism	46% Increasing renewable energy; Investors addressing climate risk
Europe	61% Civil society / NGO activism	59% Increasing renewable energy; Subsidies / investments / grants	
Latin America / Caribbean	69% Civil society / NGO activism	62% Increasing renewable energy	58% Climate / nature / biodiversity disclosure regulations
North America	67% Civil society / NGO activism	60% Increasing renewable energy	56% Utilization of bridge fuels

*Small sample size

Obstacles to a Just Transition

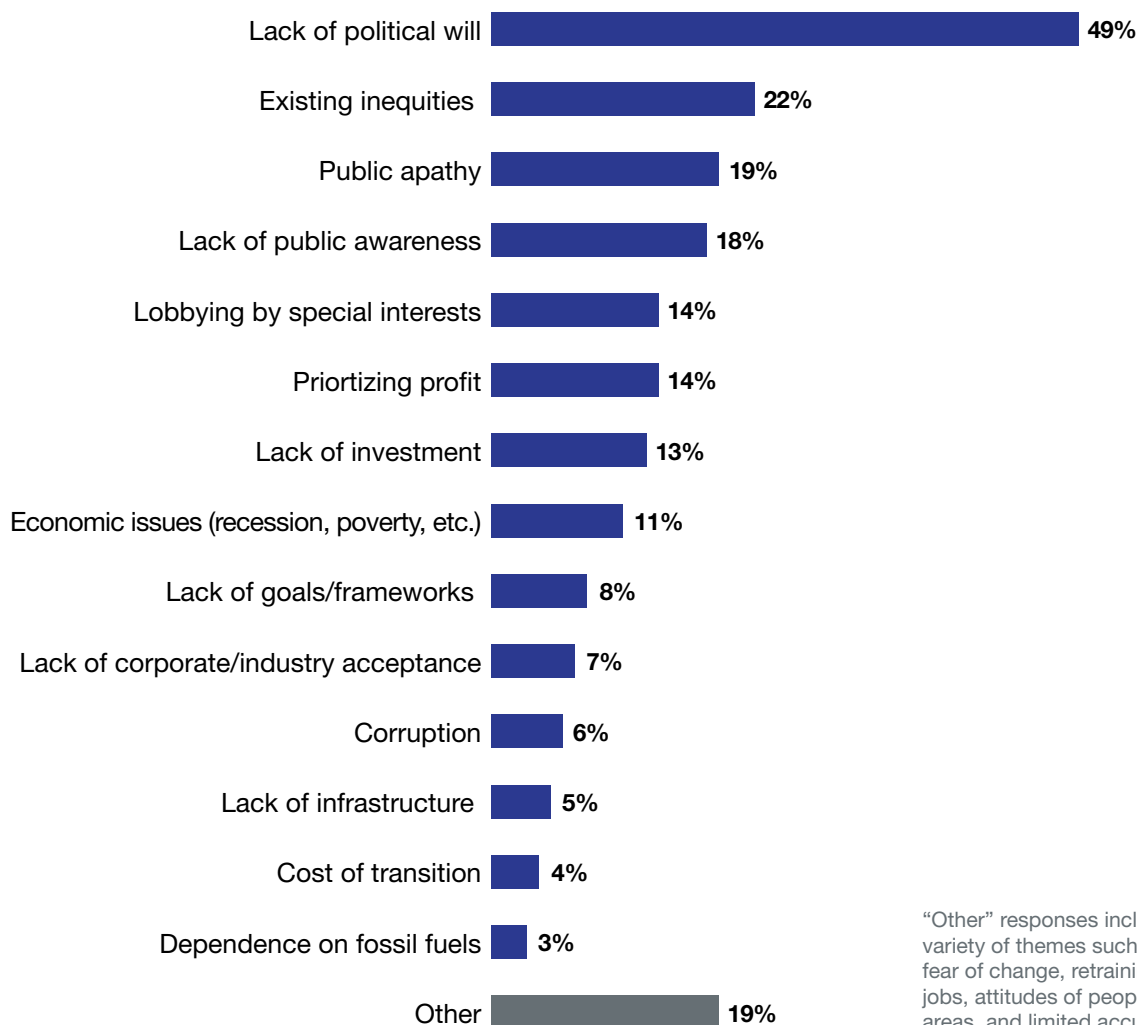
Lack of political will is seen by experts as the greatest obstacle to achieving a just transition

Almost half of experts say a lack of political will constitutes the greatest barrier to achieving a just transition in their country. Issues around existing inequities, public disinterest, and lack of general awareness are also frequently mentioned as hindering the equitable distribution of the costs and benefits of climate action.



There is a growing focus on a “just transition” to address climate change. By “just transition” we mean equitably distributing the costs and benefits of climate action. In your country, what are the greatest obstacles to achieving a just transition as we address climate change?

% of Experts, Unprompted, Total Mentions, 2022



“Other” responses include mentions of a variety of themes such as deforestation, fear of change, retraining needed for new jobs, attitudes of people living in different areas, and limited accurate reporting.

The perceived obstacles to achieving a just transition are relatively consistent across geographies

Lack of political will as a key barrier to a just transition is highlighted by all experts surveyed, although those based in Africa / Middle East tend to point more to economic issues and a lack of green infrastructure.

Q There is a growing focus on a “just transition” to address climate change. By “just transition” we mean equitably distributing the costs and benefits of climate action. In your country, what are the greatest obstacles to achieving a just transition as we address climate change?

% of Experts, Unprompted, Total Mentions, by Sector and Region, 2022

	Most mentioned greatest obstacle	2nd most mentioned greatest obstacle	3rd most mentioned greatest obstacle
Academic & Research	45% Lack of political will	34% Lobbying by special interests	32% Lack of public awareness
Corporate	52% Lack of political will	19% Existing inequities; Public apathy	
Government*	100% Lack of investment	50% Lack of political will	25% Existing inequities; Lack of public awareness; Prioritizing profit
NGO	39% Lack of political will; Lack of public awareness		22% Existing inequities
Service & Media	54% Lack of political will	23% Existing inequities	15% Public apathy
Africa / Middle East*	30% Economic Issues (recession, poverty, etc.); Lack of infrastructure		20% Lack of political will; Corruption
Asia-Pacific	44% Lack of political will	22% Existing inequities; Public apathy; Lobbying by special interests	
Europe	51% Lack of political will	22% Public apathy; Lack of public awareness	
Latin America / Caribbean	48% Lack of political will	28% Lack of investment; Corruption	
North America	52% Lack of political will	27% Existing inequities	19% Public apathy

*Small sample size

What experts say is the greatest obstacle to achieving a just transition

“Political polarization leading many to believe that addressing climate change and especially just transition will affect them negatively.”

Service/Media, North America

“Political willingness to take uncomfortable actions.”

Corporate, Europe

“The cost of initial investment in modern technology, not only for companies but also for consumers.”

Corporate, Latin America / Caribbean

“Failure to acknowledge the negative impacts of the current economic/business model. Continuing to place economic interests ahead of planet and people.”

Other, North America

“Lack of government regulation and incentives for small businesses and small rural producers seeking to transition to low-carbon production.”

Corporate, Latin America / Caribbean

“Government focused on protecting the rich; no desire for equitable distribution of anything.”

NGO, Europe

“There is a mismatch between business ambition and government policies and/or regulatory environment.”

Corporate, Asia-Pacific

“In a democratic country like India with very diverse income groups it will not be possible to equitably distribute the costs and benefits of climate action.”

Other, Asia-Pacific



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