



The 2017 Climate Survey

Evaluating Progress on Climate Change



About The GlobeScan-SustainAbility Survey

A unique, collaborative platform that uses research-driven insights from the most influential global thought leaders to explore the biggest sustainability challenges.



Cross-sector

We survey thousands of sustainable development experts and practitioners from the following sectors:

- Corporate
- Government (including multi-lateral institutions)
- NGOs
- Institutional (e.g., academics)
- Service (e.g., consultants, media)



Up-to-date



We publish two reports each year, and provide a regularly updated expert perspective on a range of timely topics.

Each publication is supported by a global interactive webinar where we invite the foremost thinkers to contribute to our panels.



Accessible

You can download all the latest surveys from the *GlobeScan* or *SustainAbility* websites.

-  Download from **GlobeScan**
-  Download from **SustainAbility**

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Introduction

Two years after the breakthrough achievement of the Paris Agreement, we asked global sustainability experts representing business, government, NGOs and academia to evaluate progress made by the global community on addressing climate change generally and implementing the Agreement specifically. Our expert panel's assessment is bleak.

More than half of these sustainability practitioners think that the global community is simply not moving fast enough to avert major damage by climate change, and fewer than one-third of respondents believe that we are making good progress implementing the global framework. Recent developments like the U.S. decision to pull out of the treaty and the rise of nationalist and protectionist agendas have fuelled pessimism about the future outlook of global frameworks and collective action. Experts also call out the absence of binding measures and lack of capital as major roadblocks to the achievement of the Paris goals.

In addition to insights on these challenges, we also sought expert opinions on possible solutions for climate change. In line with the trend observed in our most recent surveys, the findings reflect rapidly rising expectations for the private sector and other non-state actors, especially regional governments and cities. These organizations are perceived to be almost as important as national governments when it comes to driving progress toward implementing the Paris Agreement. The importance of non-state actors is even more pronounced regarding the climate agenda in the U.S., where fewer than one in ten experts anticipate that the federal government will play an important role in the next five years.

Many companies have increased their efforts to provide solutions on climate mitigation and adaptation, and experts are taking note. Our latest ranking of corporate leaders reflects an entirely different landscape from what we saw close to a decade ago. Consumer-facing powerhouses such as Unilever and IKEA, technology giants like Google and Apple, and many other companies are recognized in 2017 for raising the bar.

“Consumer-facing powerhouses such as Unilever and IKEA, technology giants like Google and Apple, and many other companies are recognized in 2017 for raising the bar.”

Considering climate leadership by countries, experts recognize sustained effort from established climate champions like Germany. Strikingly, China is ranked second among nations when we ask experts to name leaders in addressing climate change. Given its ambitious goals on electrification of transportation and a pending announcement of a national emissions trading scheme, China may be filling the void left by the U.S. withdrawal from leadership.

We hope this report will provide valuable insights and much-needed thought leadership to help advance the global community's efforts on climate. Our findings affirm that COP23's priorities of collaboration, contributions from non-state actors and the need to scale up ambition are well advised.

“Given its ambitious goals on electrification of transportation and a pending announcement of a national emissions trading scheme, China may be filling the void left by the U.S. withdrawal from leadership.”

Survey Methodology

398 qualified sustainability experts completed the online questionnaire from September 26th to October 13th, 2017.

Sectors

Respondents were drawn from the following sectors:



5%
Government



27%
Service & Media



22%
Academic & Research



26%
Corporate



12%
NGO



8%
Other

Geography

Experts surveyed span 55 countries in the following regions:



34%
North America



38%
Europe



9%
Asia



8%
Latin America & Caribbean



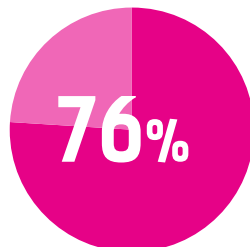
5%
Africa & Middle East



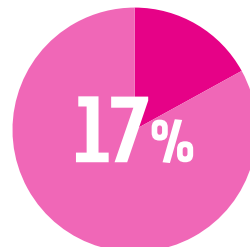
6%
Oceania

Experience

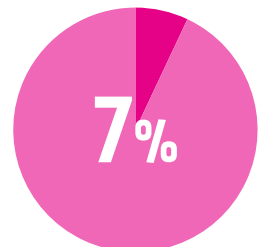
Respondents have the following experience working on sustainability issues:



More Than 10
Years



5 to 10
Years

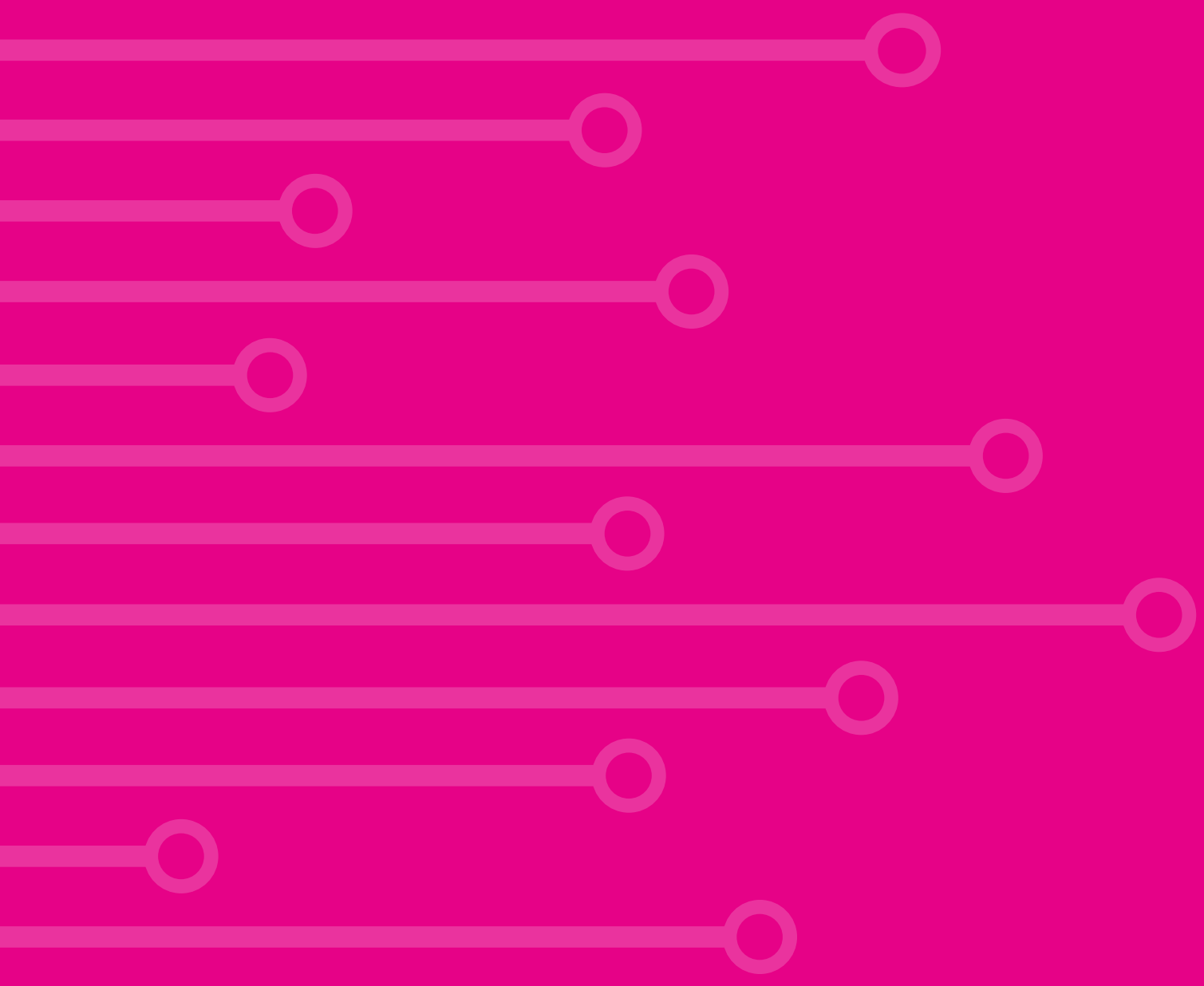


3 to 4
Years

Key Findings

- More than half of sustainability experts (55%) believe that global climate progress will not occur fast enough to avert irreversible damage. While three in ten think that at least some progress has been achieved on the Paris Agreement goals, experts' overall assessment is critical.
- At the global level, practitioners hold up national governments and the private sector as most essential to the successful implementation of the Paris Agreement. With regard to the climate agenda in the U.S., however, sustainability experts now view the federal government as less crucial, and instead look to regional or municipal governments to lead progress--along with companies.
- Experts cite a lack of global government action or oversight as a major barrier to implementation of the Paris Agreement goals, and they increasingly favor economic instruments to incentivize climate progress over other approaches like regulation or international cooperation and diplomacy.
- Sustainability practitioners believe that a wide variety of strategies can be effective for companies seeking to take action on climate change, though increasing renewable energy and focusing on their supply chains to reduce carbon emissions are rated as being slightly more effective than others.
- The landscape of corporate climate leaders has changed markedly since 2009, when experts most commonly named industrial companies like General Electric, Toyota, BP and Shell as leaders. Sustainability professionals now identify Unilever and Tesla, along with other peers in technology and consumer goods who round out the top ten.
- When considering which countries are current leaders in addressing climate, experts are most likely to name Germany (37%), followed by China (25%). China is the only Asian country among the top ten and recognition for its efforts far exceeds that of the U.S. (named by 5% of experts).

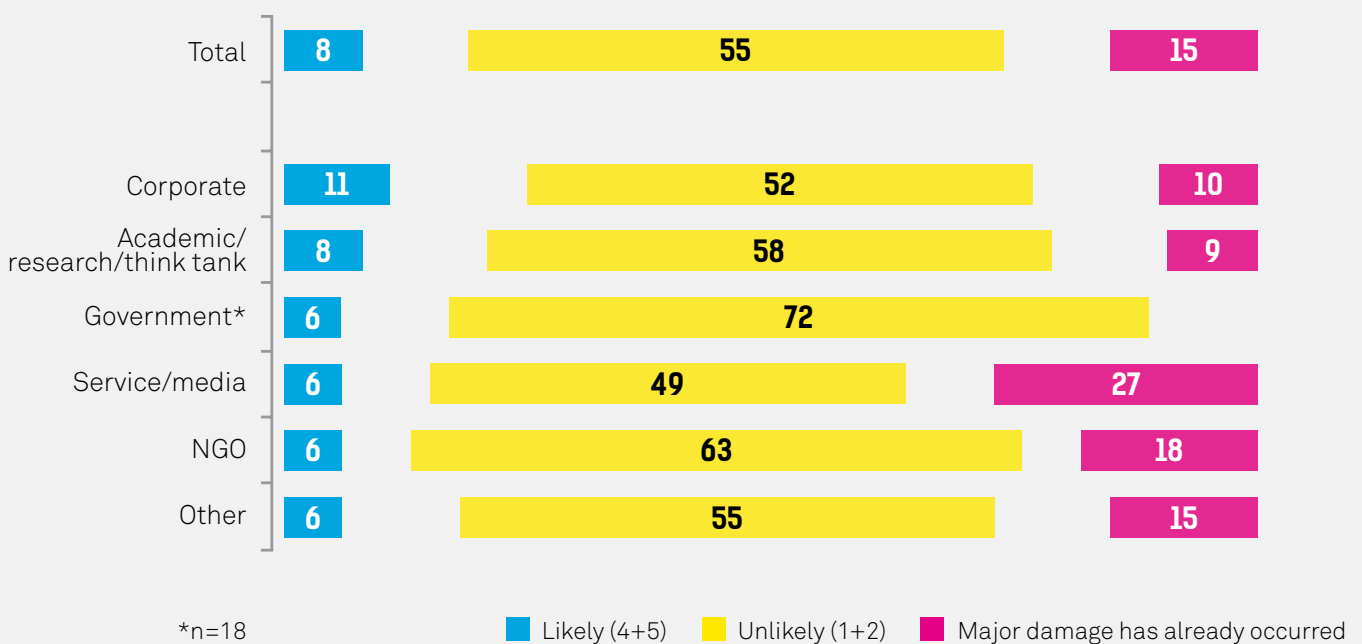
Views on Climate Progress



Views on Climate Progress: Slow and Insufficient

The majority of experts believe that global progress to address climate change is not occurring fast enough to avert major, irreversible damage to human, social and ecosystem health. Fifteen percent of experts say that major damage has already occurred. These views are consistent across all stakeholder types, with NGOs and government practitioners being the most pessimistic. Corporate experts view society's progress in the most positive terms.

All respondents, 2017, % of Experts



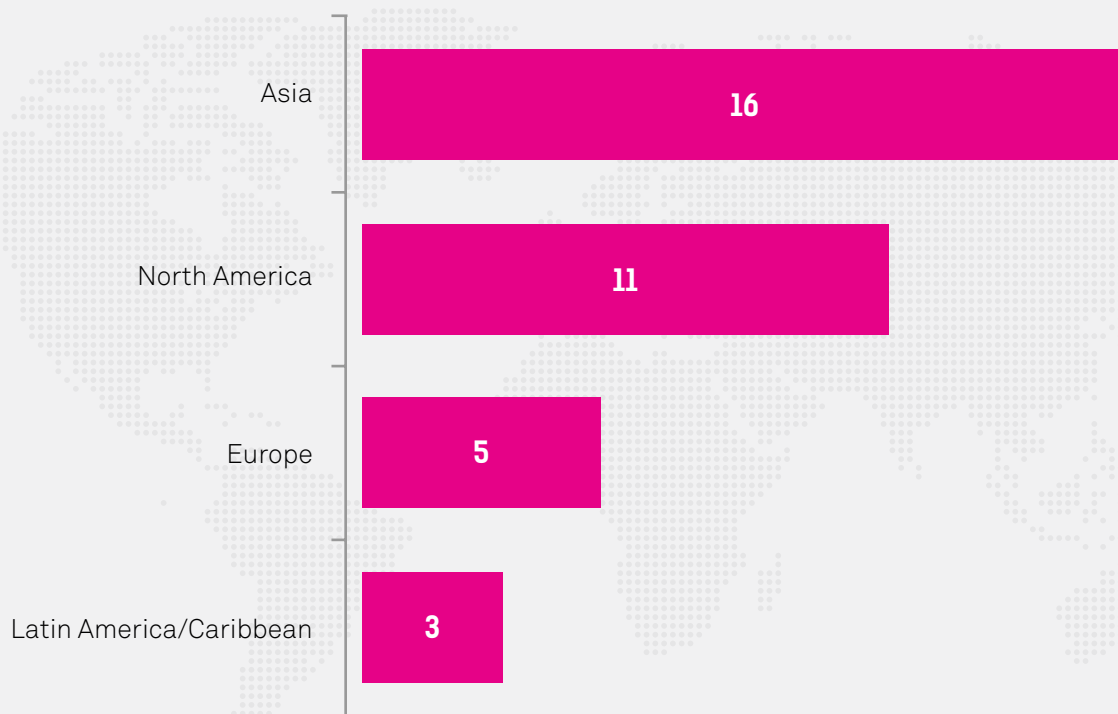
Question

Thinking of the present rate at which society is making progress toward addressing climate change, please rate the likelihood that progress will occur fast enough to avert major, irreversible damage to human, social and ecosystem health. *Please use the 5-point scale (where 1 is "Very unlikely" and 5 is "Very likely"). If you believe that major irreversible damage has already occurred, please choose "Already occurred."*

Views on Climate Progress: Asian Respondents Are Most Optimistic

Sustainability professionals in Asia are the most optimistic about global progress to address climate change, followed by North American experts. In all other regions, fewer than one in ten practitioners believe that society is making progress fast enough to avert irreversible damage.

All respondents, By region, "Likely" (4+5), 2017, % of Experts



Question

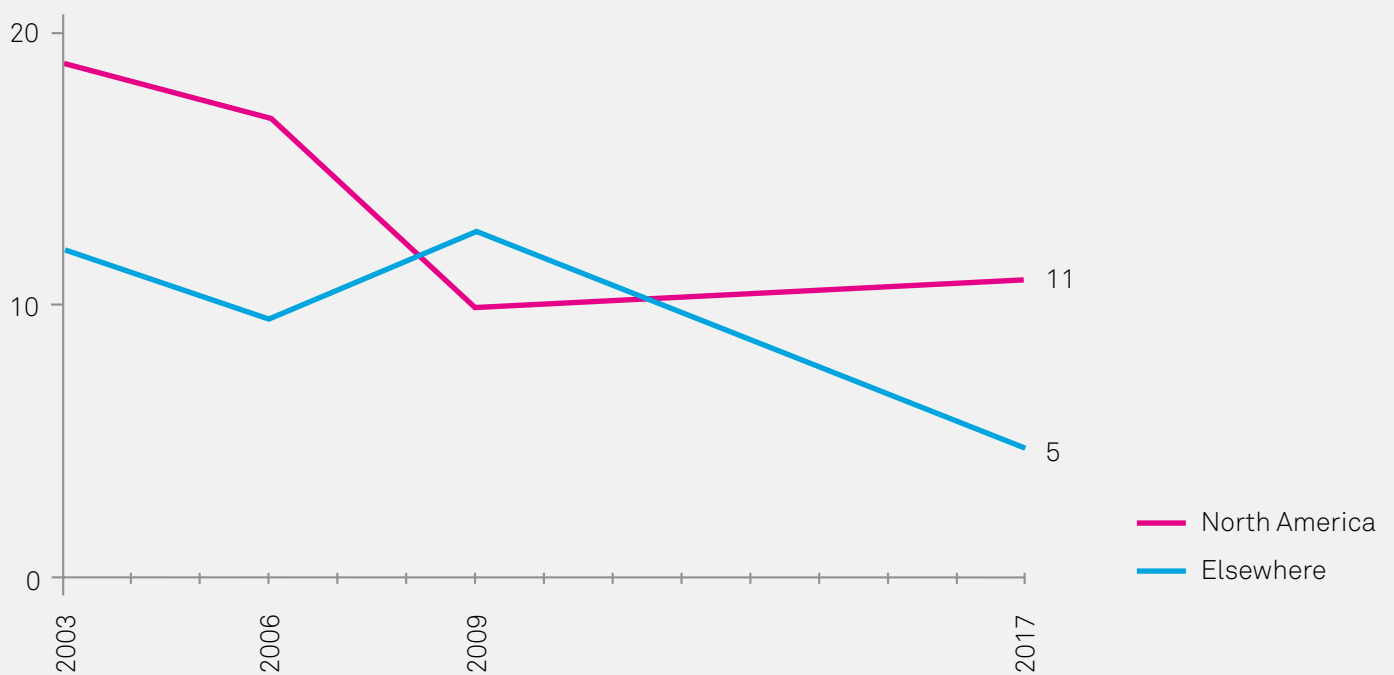
Thinking of the present rate at which society is making progress toward addressing climate change, please rate the likelihood that progress will occur fast enough to avert major, irreversible damage to human, social and ecosystem health. Please use the 5-point scale (where 1 is "Very unlikely" and 5 is "Very likely"). If you believe that major irreversible damage has already occurred, please choose "Already occurred."

Views on Climate Progress:

Climate Optimism Has Declined Since 2009

Climate optimism has been on the decline since 2009 across most regions, as experts are decreasingly likely to feel that climate progress will avert major damage. In contrast, the views of North Americans have remained fairly consistent since 2009 – about a tenth of sustainability professionals in this region believe that climate progress is occurring fast enough to avert major damage.

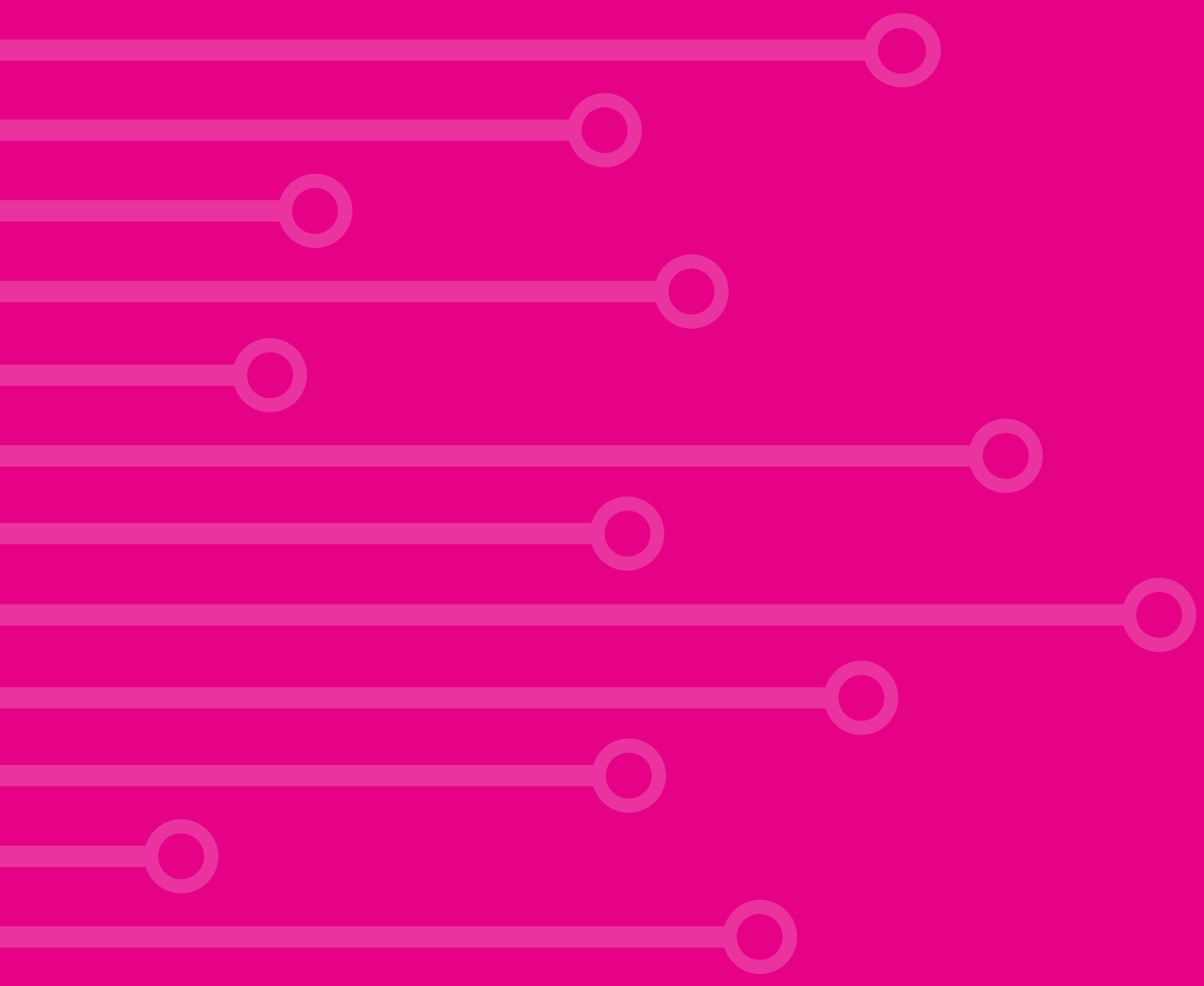
North America vs Elsewhere, “Likely” (4+5), 2003–2017, % of Experts



Question

Thinking of the present rate at which society is making progress toward addressing climate change, please rate the likelihood that progress will occur fast enough to avert major, irreversible damage to human, social and ecosystem health. *Please use the 5-point scale (where 1 is “Very unlikely” and 5 is “Very likely”). If you believe that major irreversible damage has already occurred, please choose “Already occurred.”*

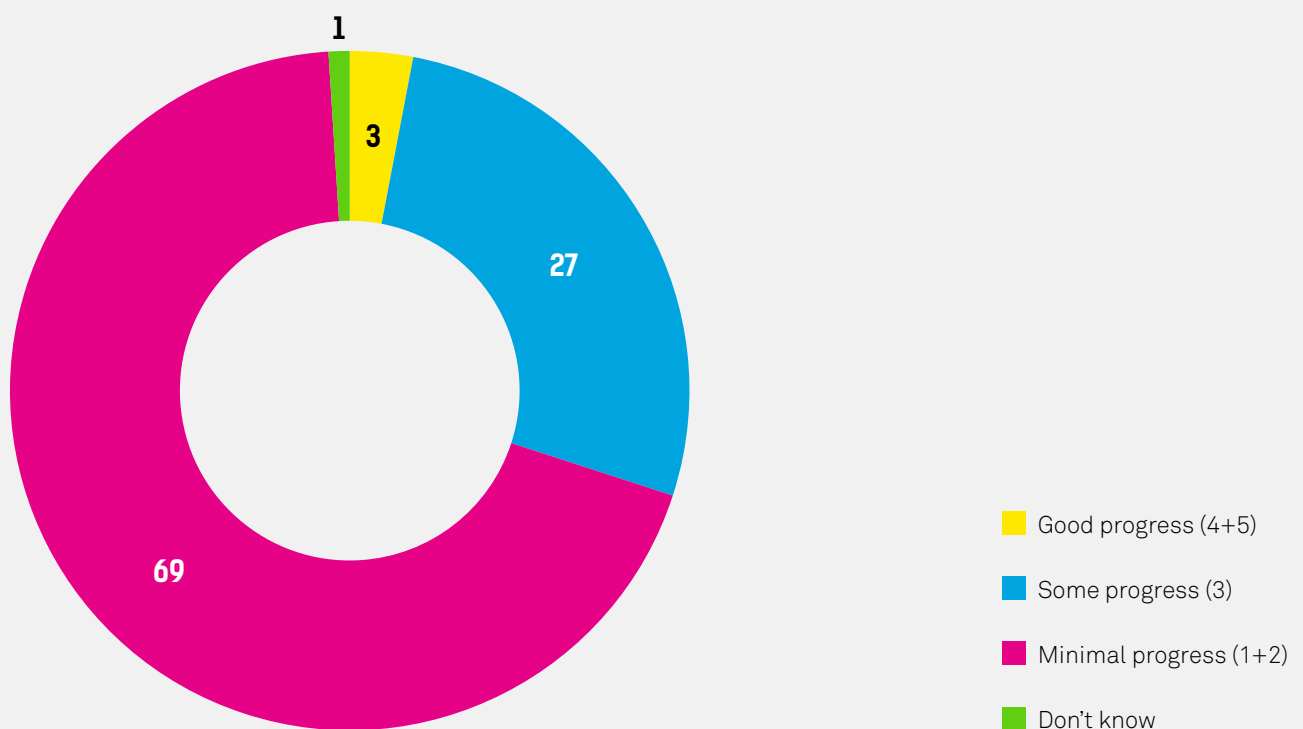
Advancing Paris Agreement Goals



Advancing Paris Agreement Goals: Limited Progress

Three in ten experts feel that at least some global progress has been achieved on the implementation of Paris Agreement goals, but the overwhelming majority are critical and believe that progress has been minimal. Only 3% of global respondents share the view that society is on track toward implementing the global framework signed in 2015.

All respondents, 2017, % of Experts



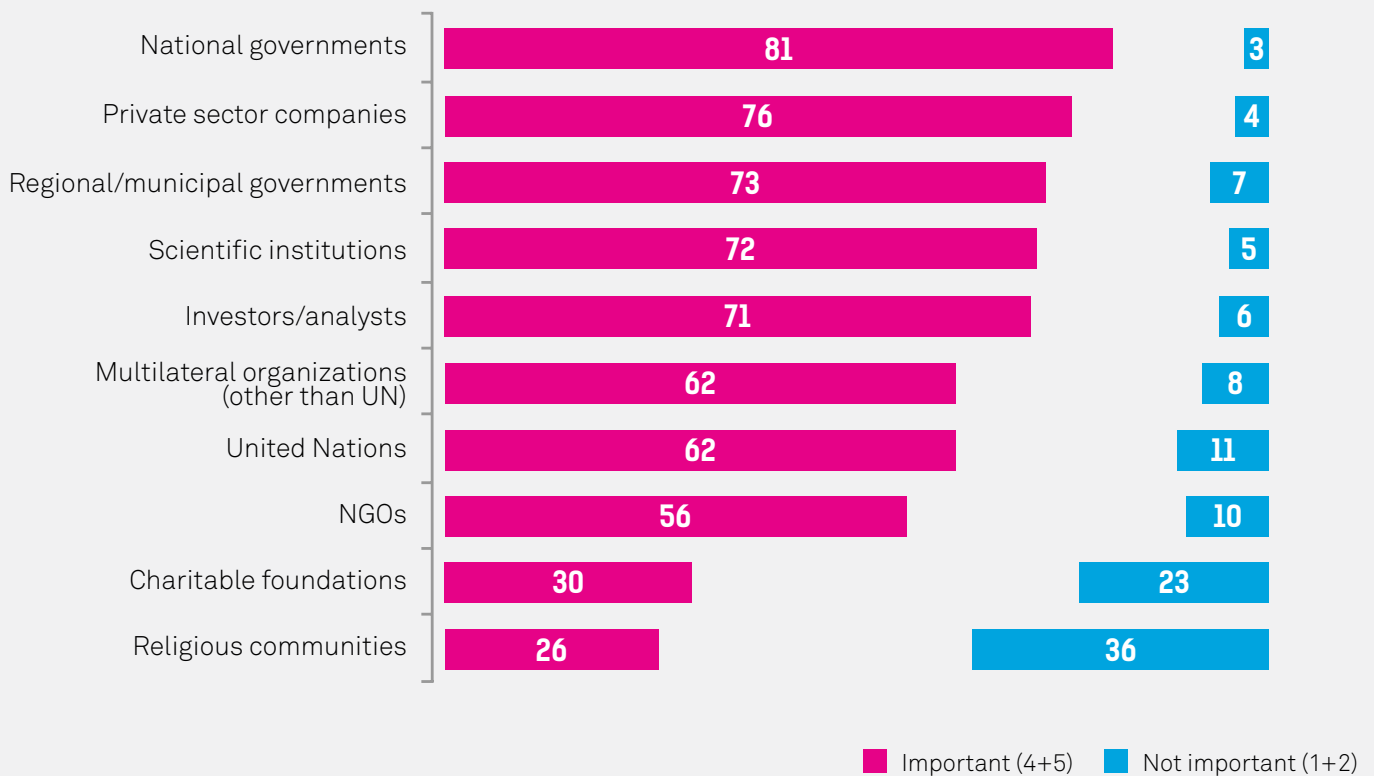
Question

Please rate the level of progress made so far globally on the implementation of Paris Agreement goals. Please use the 5-point scale provided (where 1 is “No progress at all” and 5 is “A great deal of progress”).

Advancing Paris Agreement Goals: Collective Effort Will Determine Success of Paris Agreement Goals

Combined efforts across multiple organizations will determine the success of Paris Agreement implementation. Experts view national governments and private sector companies as having the most important role in the process. While ranked somewhat lower, regional and municipal governments, scientific institutions and investors are also considered highly important, by more than seven in ten professionals.

All respondents, 2017, % of Experts



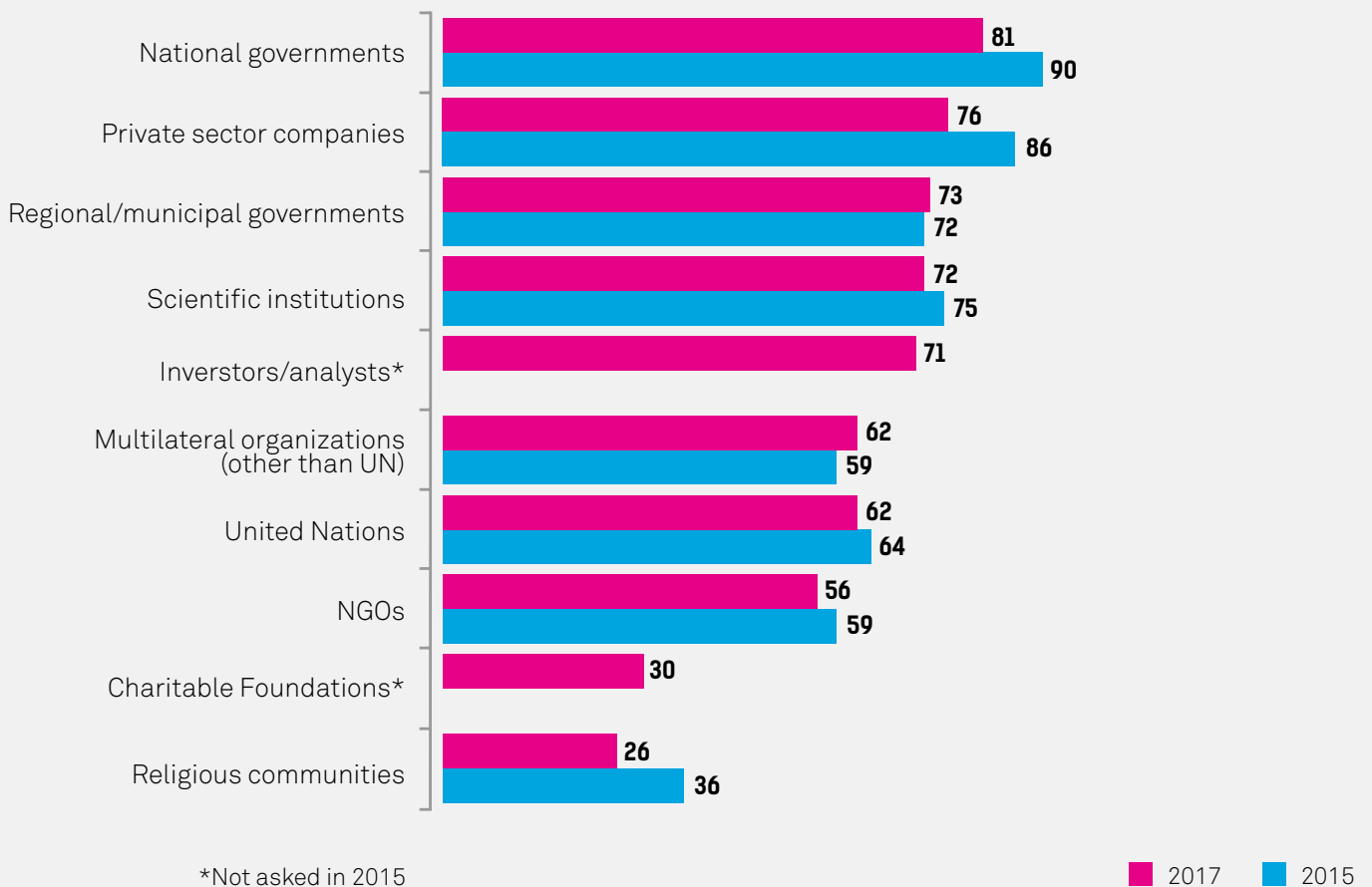
Question

How important will the role of each of the following 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”).

Advancing Paris Agreement Goals: Emphasis on Collective Responsibility

Since 2015, expert views on the most important organizations in progressing the global climate framework have mostly remained consistent. National governments and companies are seen as key institutions, while the emphasis on collective effort of multiple stakeholders has further increased.

Most Important Organizations (4+5), All respondents, 2015 vs 2017, % of Experts



Question

How important will the role of each of the following 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”).

Advancing Paris Agreement Goals: Non-State Actors Seen As Key Drivers of U.S. Climate Agenda

For advancing the climate agenda in the United States, experts view the key actors of climate progress differently from the global context. Respondents feel that regional or municipal governments, not the U.S. federal government, will play an important role in the U.S. climate agenda, together with the private sector. After President Donald Trump announced that the country would be pulling out of the Paris Agreement, less than a tenth of experts expect the federal government will play an important role in advancing climate goals.

All respondents, 2017, % of Experts



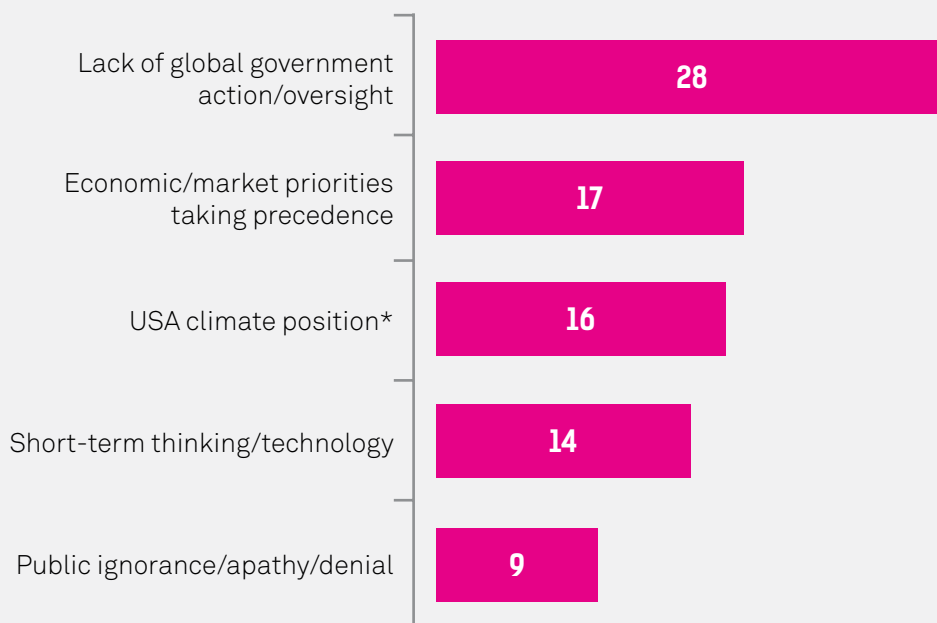
Question

Thinking of the United States specifically, which institutions or organizations will play the greatest role in advancing the climate change agenda in the next 5 years? *Please select and rank the top two.*

Advancing Paris Agreement Goals: Lack of Oversight Mechanism and Economic Priorities Are Key Barriers

Experts cite slow or lack of global government action and oversight as the biggest barriers to effective implementation of the Paris Agreement. Continued focus on economic growth at the cost of other priorities is also viewed as a major roadblock. The U.S. position is mentioned by 16% of polled experts, with more than a third of this group calling out President Donald Trump as jeopardizing the achievement of global climate goals.

All respondents, Unprompted total mentions, 2017, % of Experts



*36% of these respondents mention President Trump by name

Question

What are the greatest barriers that may pose risks to the effective implementation of the Paris Agreement goals? *Please enter up to two responses.*

Advancing Paris Agreement Goals: Quotes About Barriers

“ Lack of global government action and oversight

“No sanctioning mechanism for those who do not make progress”

“Lack of a global market-based mechanism”

“No specific government implementation plans”

“ Economic/market priorities taking precedence

“Economic growth has priority and climate change is not perceived as supporting that”

“Lack of capital to build the things needed to reach the goals”

“Capital markets that have for decades valued fossil assets at the cost of renewable markets”

“ USA climate position

“United States’ position and resignation of the Agreement”

“Rogue countries, such as the USA, not accepting climate science”

“Trump. USA belligerence.”

“ Public ignorance/apathy/denial

“Lack of knowledge by the population. Lack of belief there is an issue.”

“Consumer apathy”

“Climate change has a PR problem, people aren’t engaged with it and major leaders still dispute it.”

“ Short-term thinking and technology

“Not enough available renewable fuels for the industry and for house warming”

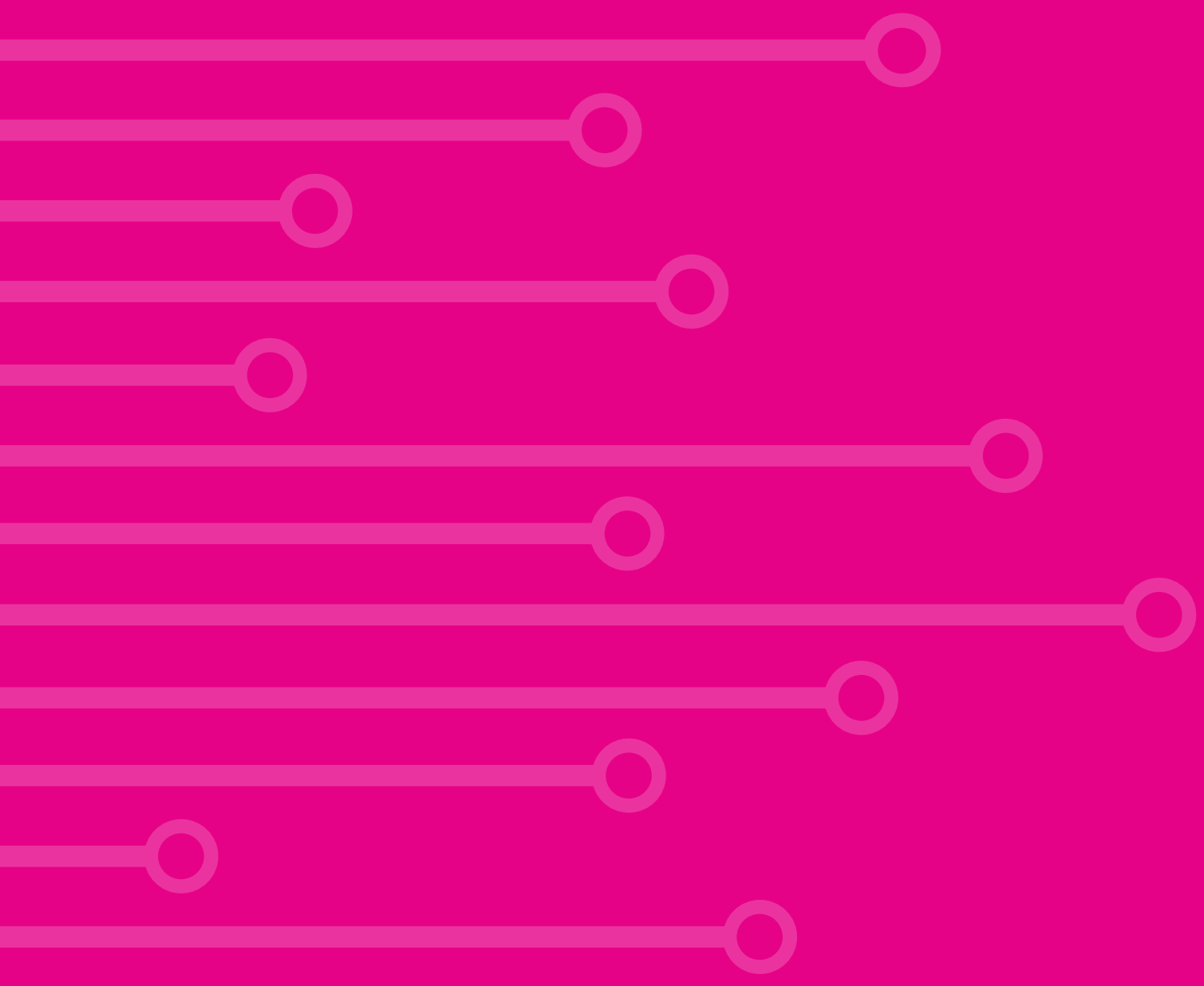
“Fear of the short- to mid-term economic consequences of implementation”

“Attempts to save fossil fuel industries from natural evolution”

Question

What are the greatest barriers that may pose risks to the effective implementation of the Paris Agreement goals?

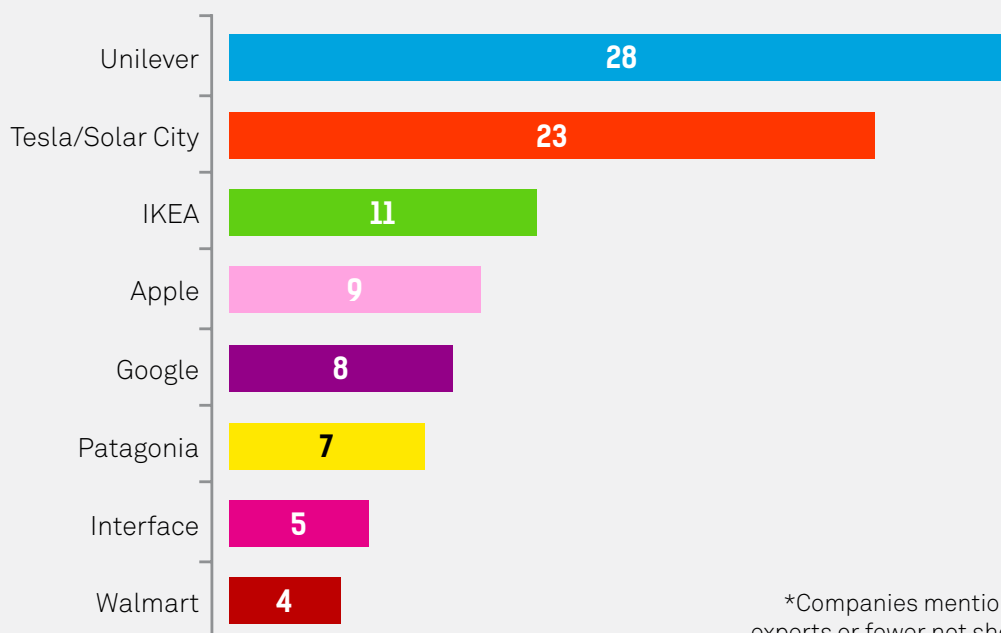
Corporate Climate Leadership



Corporate Climate Leadership: Unilever and Tesla Are Leading on Corporate Climate Action

Experts name Unilever and Tesla as global corporate leaders in addressing climate change. They are joined in the top ten leading companies by peers in either the technology sector (Apple, Google and GE) or the consumer goods industries (IKEA, Patagonia and Walmart). Brazilian cosmetics manufacturer Natura is the only emerging markets player to make the leaders list. Interface is the only company in the top eight that is not primarily consumer-facing.

All respondents, Unprompted, Total mentions, 2017, % of Mentions



*Companies mentioned by 3% of experts or fewer not shown on chart

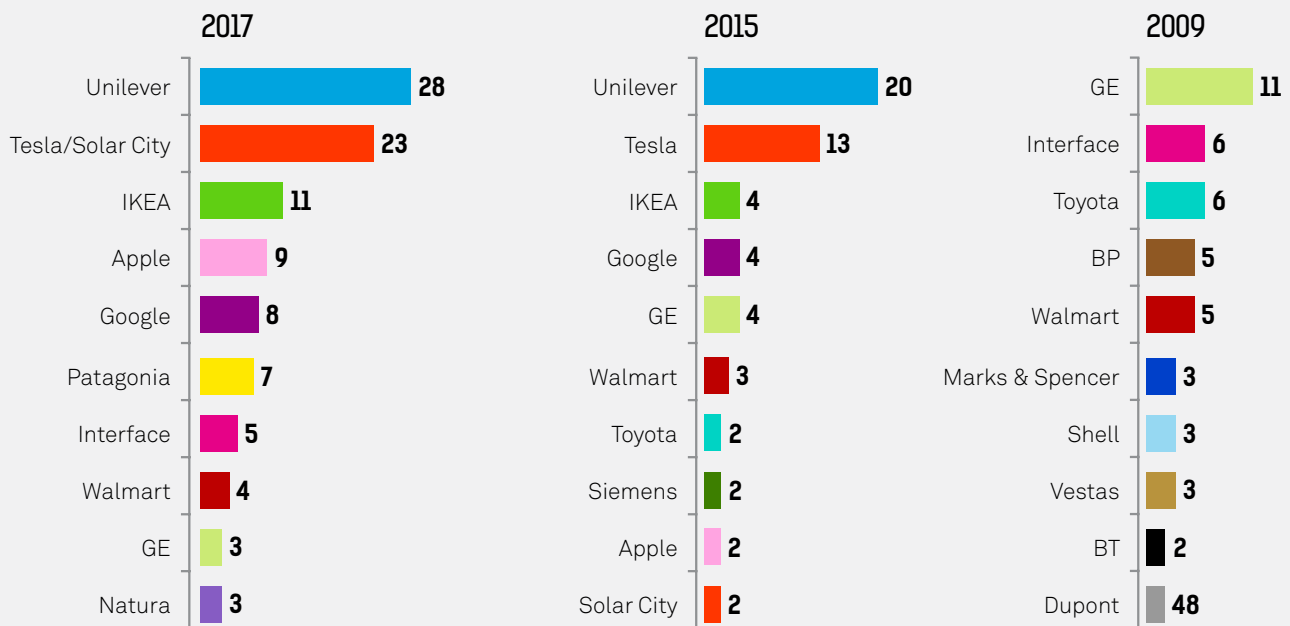
Question

Which companies do you think are leaders in addressing climate change? *Please enter a maximum of 3 companies.*

Corporate Climate Leadership: Tracking the Evolution

Since 2015, Unilever, Tesla and IKEA have solidified their leadership and continue to be viewed as leaders in climate change. Several other companies (Apple, Google, Patagonia, Interface, Walmart and Natura) have also seen increased recognition for their efforts. There has been an important shift in climate leadership since 2009 from heavy presence of industrial companies (GE, Toyota, BP, Shell, Dupont) to technology and consumer-facing companies.

All respondents, Unprompted, Top ten total mentions, 2017, 2015, 2009, % of Mentions



Question in 2009 and 2017

Which companies do you think are leaders in addressing climate change? *Please enter a maximum of 3 companies.*

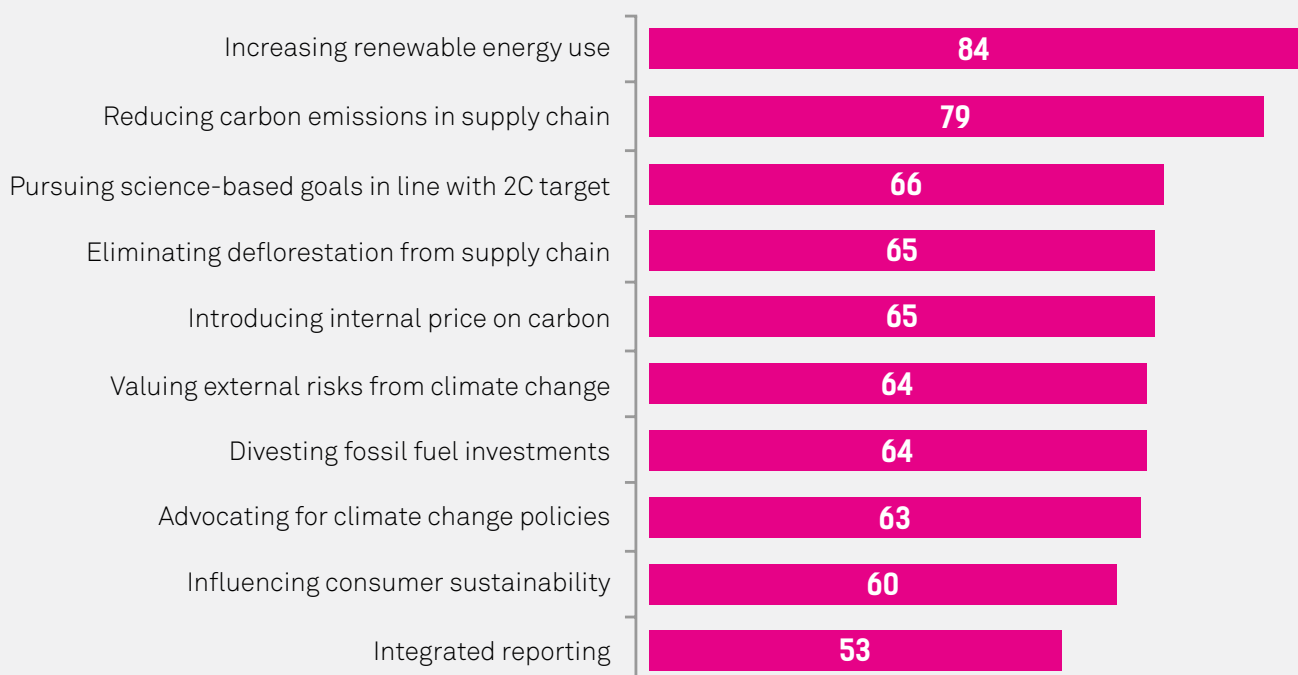
Question in 2015

Please name up to two companies that you think have made the biggest contribution to advancing solutions to climate change in the past five years.

Corporate Climate Leadership: Most Effective Corporate Strategies for Climate Solutions

Sustainability practitioners believe that a range of strategies are effective for companies seeking to take action on climate change, with increased renewable energy use and reduction of carbon emissions in the supply chain seen as slightly more effective than others. Expert opinions on these strategies have changed little since 2015.

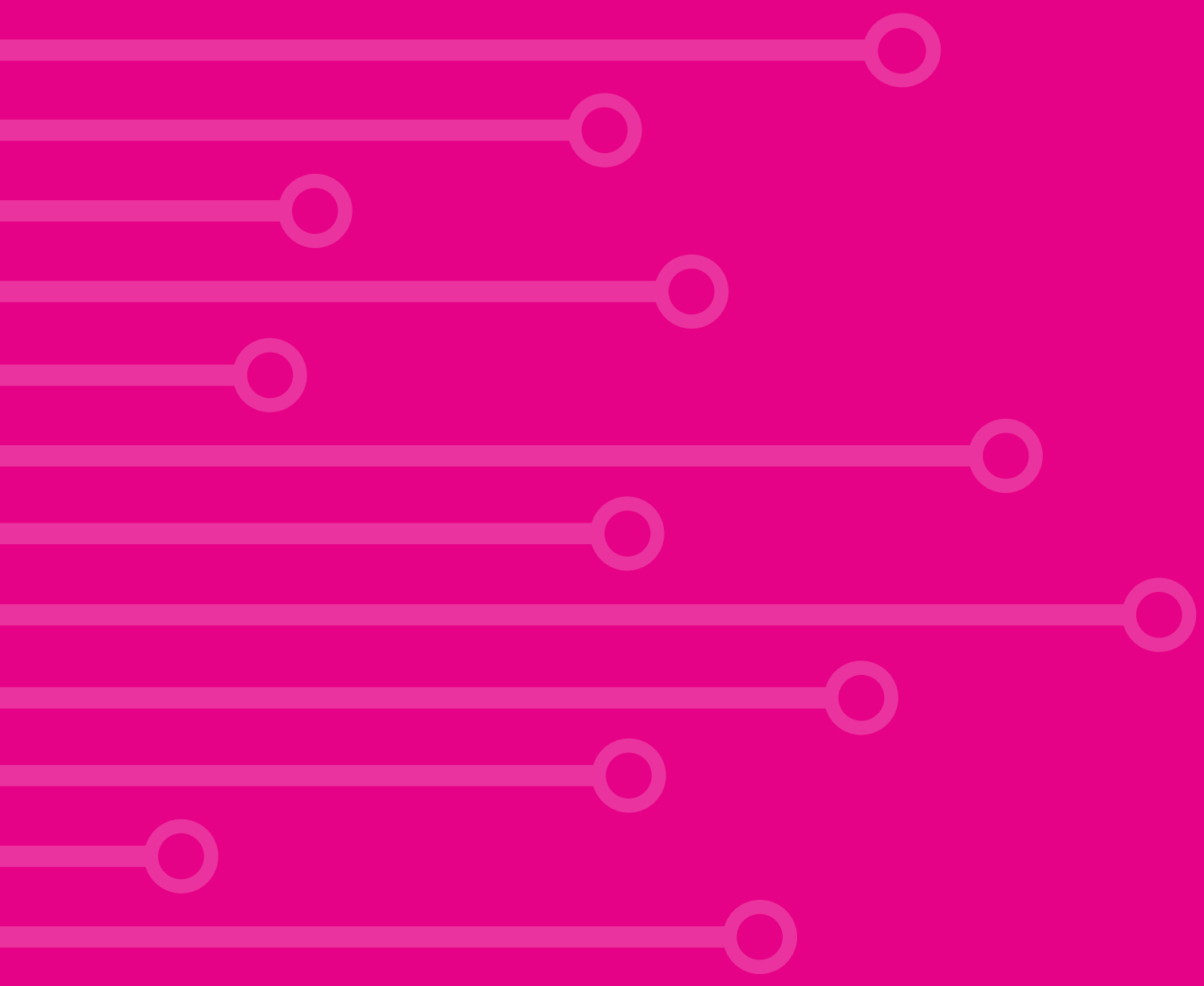
All respondents, "Effective" (4+5), 2017, % of Experts



Question

How effective or ineffective do you think each of the following instruments and strategies are for companies trying to take action on climate change? Please use the 5-point scale provided where 1 is "Not effective at all" and 5 is "Very effective".

Effectiveness of Instruments

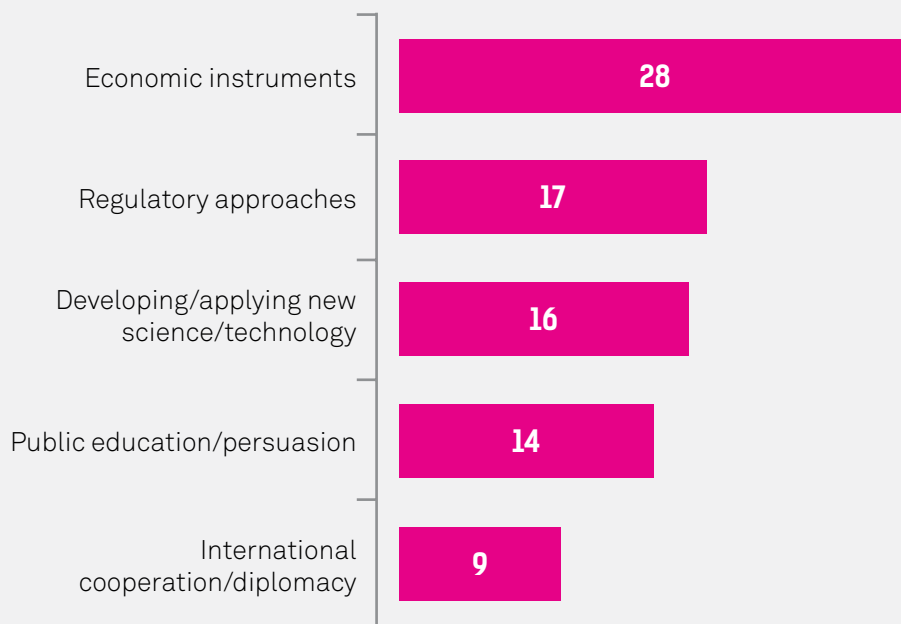


Effectiveness of Instruments:

Economic Approaches Seen As Most Effective

Experts believe that the most effective way to address climate change globally is through economic instruments, such as emissions trading schemes and carbon taxes. Regulatory approaches and the development and application of new technologies are also seen as important in providing global solutions.

All respondents, Top Ranked Approaches, 2017, % of Experts



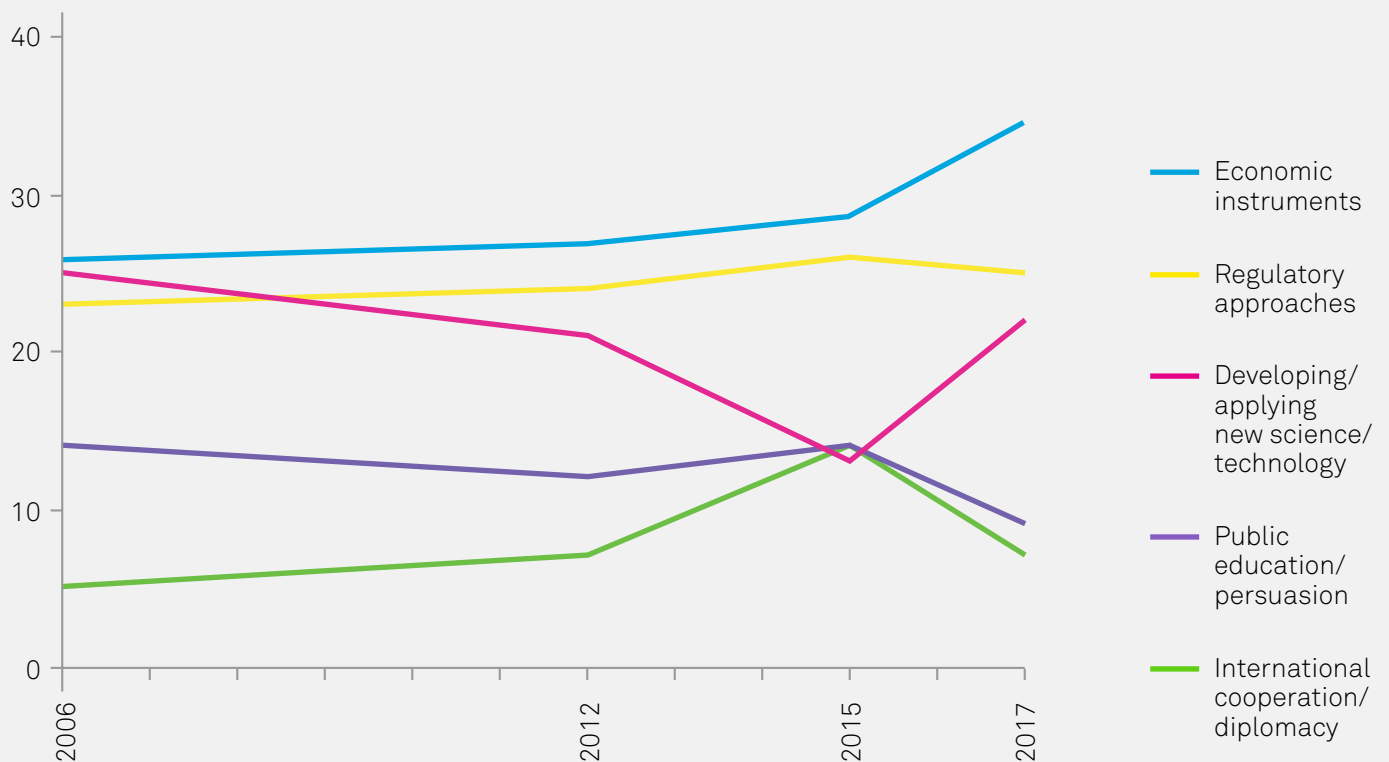
Question

How would you rank the following approaches in terms of their (likely) effectiveness in providing global solutions to climate change? *Please rank the approaches below in order of their likely effectiveness.*

Effectiveness of Instruments: Changes Since 2006

In recent years, economic instruments and scientific innovation have become increasingly seen as the most effective instruments for providing global solutions to climate change. Although public education and multilateral processes have become less favored, ratification of the Paris Agreement in 2015 had a demonstrable effect in elevating perceptions of international cooperation and diplomacy.

All respondents, Top Ranked Approaches, 2006–2017, % of Experts



Question

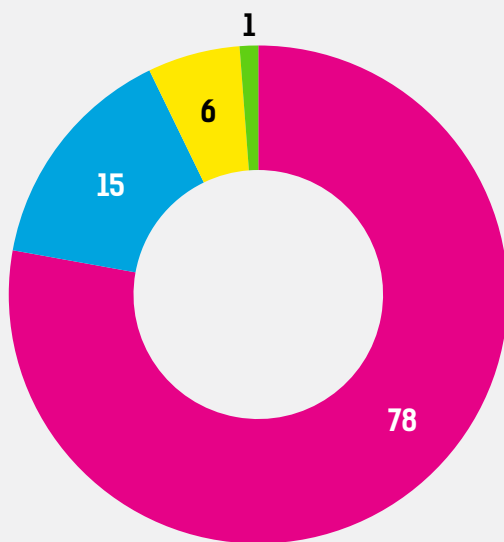
How would you rank the following approaches in terms of their (likely) effectiveness in providing global solutions to climate change? *Please rank the approaches below in order of their likely effectiveness.*

Effectiveness of Instruments:

Expectations of Business In Shaping Government Policy

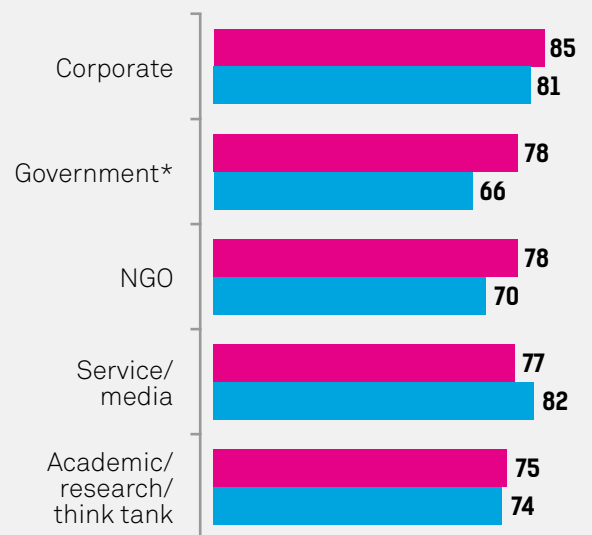
The overwhelming majority of experts believe that business should play a very active role in shaping the government climate policy. Experts in government and NGO roles have increased expectation of business' role since 2009.

All respondents, 2017, % of Experts



- Active role (4+5)
- Neutral (3)
- Very little or no role (1+2)
- Don't know/no answer

"Active Role" (4+5), By stakeholder respondent type, 2009 vs 2017, % of Experts



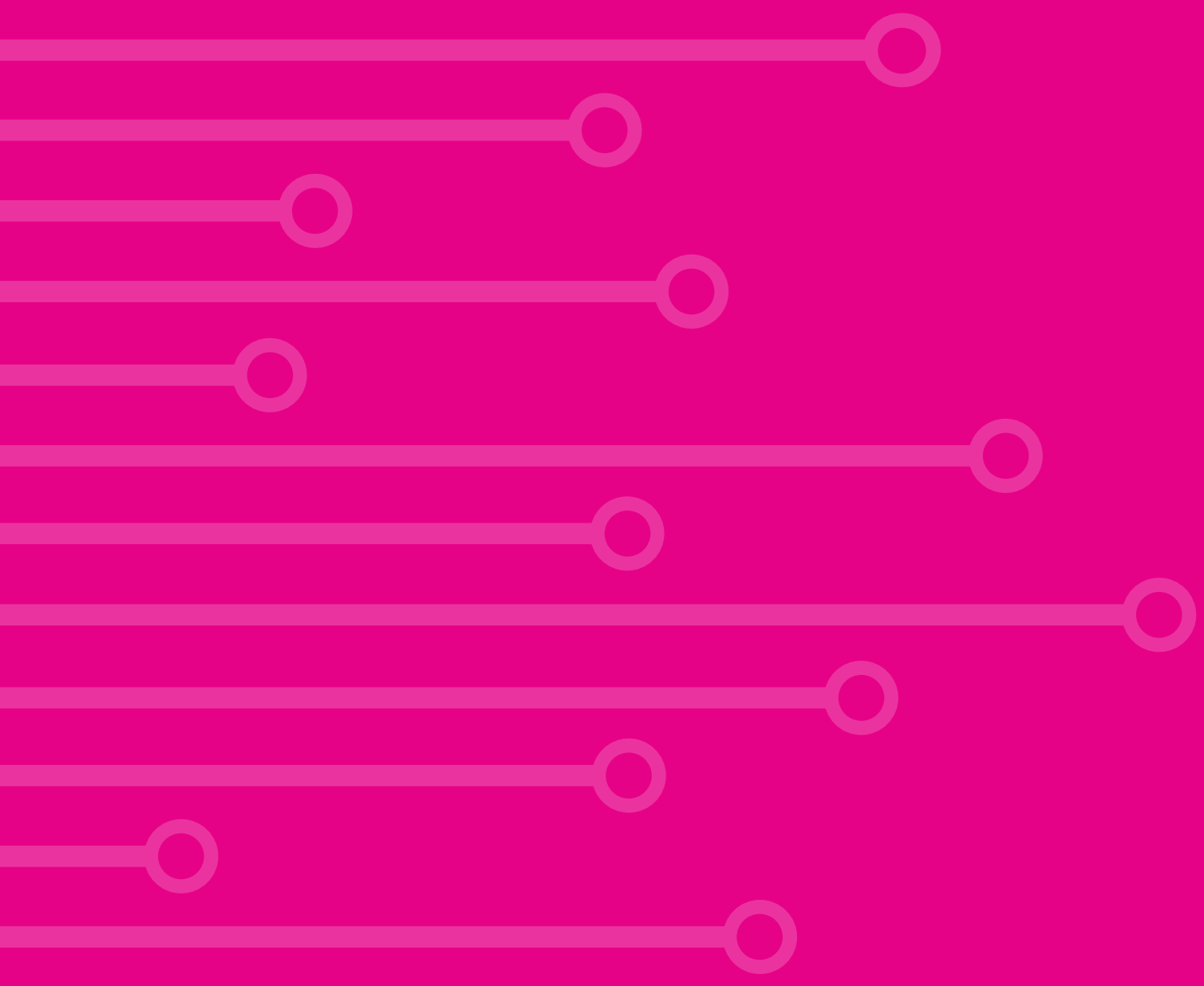
*n=18

■ 2017 ■ 2009

Question

Please indicate how active a role business should take in shaping government climate policy over the next five years. Please answer using the 5-point scale (where 1 is "No role at all" and 5 is "A very active role").

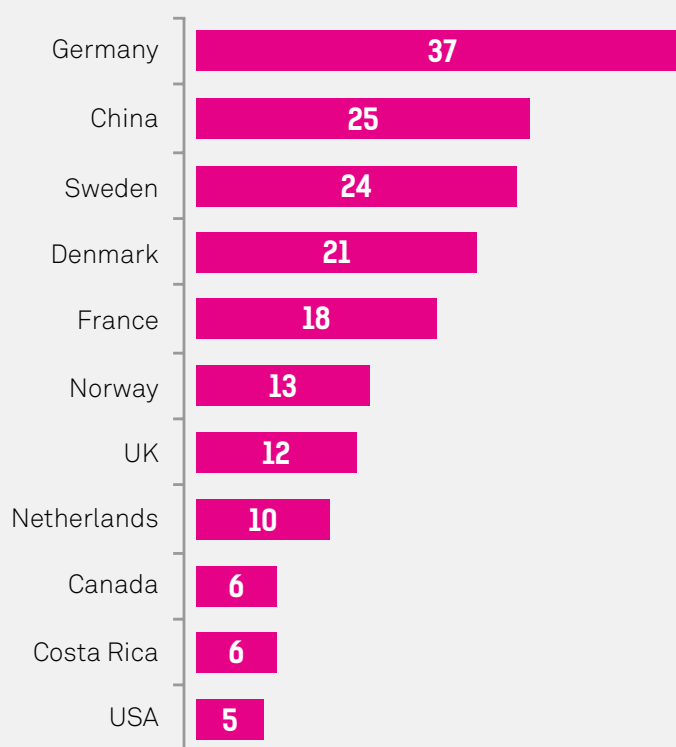
Country Climate Leadership



Country Climate Leadership: European Countries and China Seen As Leading on Climate

Germany is most frequently mentioned as a global leader on climate, followed by China, which is viewed as a leader by a quarter of experts. Scandinavian countries Sweden, Denmark and Norway are also among the countries perceived to be doing the most to advance the climate change agenda, while the United States is mentioned by only 5% of respondents. In addition to China, Costa Rica is the only other country outside of Europe and North America on the list of ten most-mentioned countries.

All respondents, Unprompted, Total mentions, 2017, % of Mentions



*5% of respondents mention EU/Europe

Question

Which countries do you think are leaders in addressing climate change? *Please enter a maximum of 3 countries.*

Further Information

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