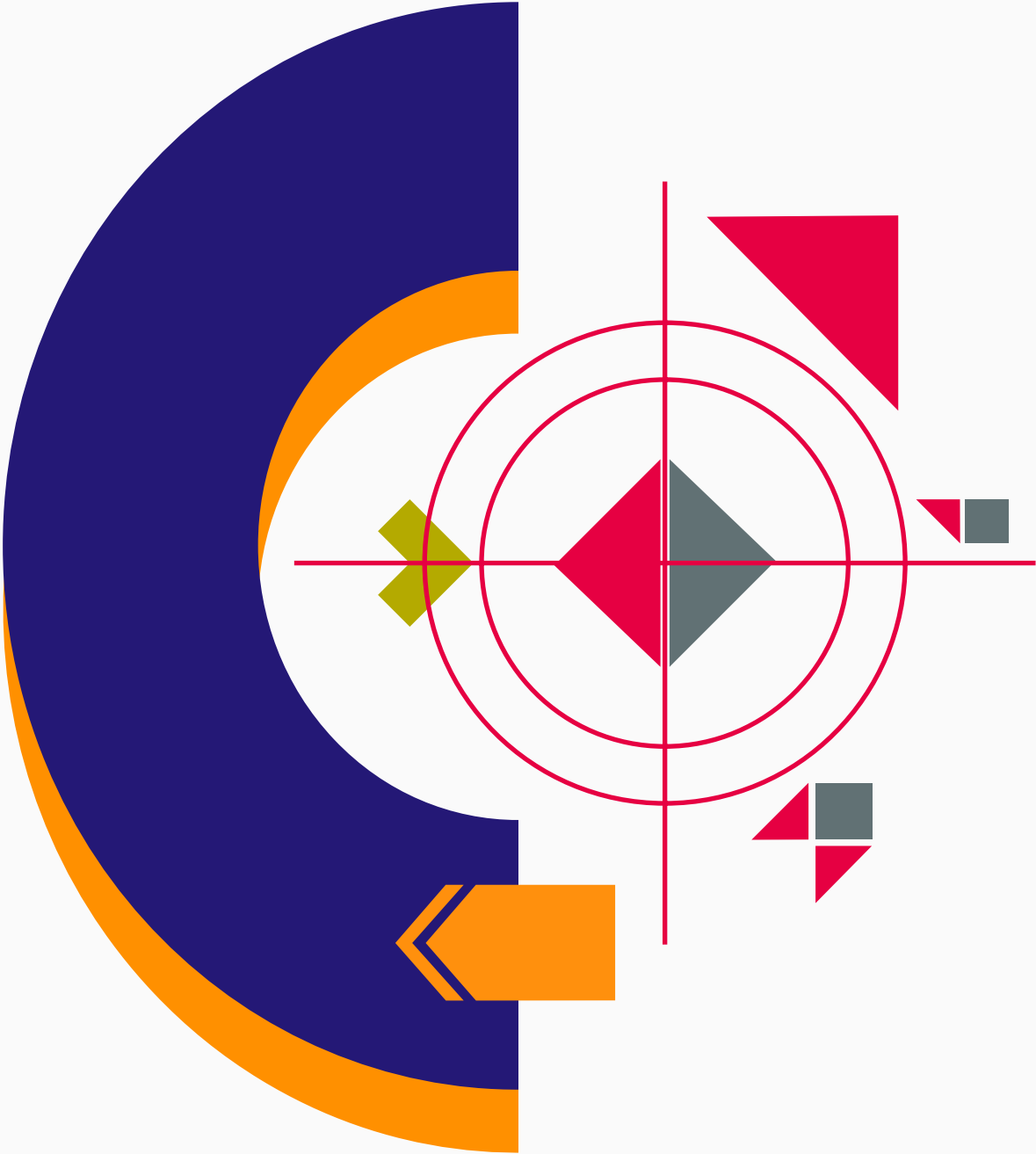


The 2021 Climate Survey

Responding to Humanity's Code Red

October 2021



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About the GlobeScan / SustainAbility Institute by ERM 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 at least 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 foremost thinkers to contribute to our panels.



Accessible

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

Download from
▶ [GlobeScan](#)

Download from
▶ [The SustainAbility Institute by ERM](#)

Introduction

This 2021 GlobeScan / SustainAbility Institute by ERM Survey captures the perceptions of hundreds of sustainability experts globally on climate progress and climate leadership, revealing how perceptions are changing and where progress is – or is not – perceived to be occurring.

This is a critical moment. In August 2021, the Intergovernmental Panel on Climate Change (IPCC) released its Sixth Assessment Report (AR6) on the science related to climate change.

It labelled our present situation as an unequivocal “code red for humanity,” stating that a 1.5°C temperature rise will be reached and breached in the middle of this century and underscoring the urgency of action.

Meanwhile, the world awaits COP26, the United Nations Climate Change Conference taking place in November 2021 in Glasgow, Scotland, wondering whether the governments that will gather for the event will reach agreements capable of stemming and reversing the climate crisis.

This year’s GlobeScan / SustainAbility Institute by ERM Survey finds most experts remain pessimistic about our ability to avert major damage from climate change and about the prospect of meeting the Paris Agreement goals.

While respondents hope that COP26 will shift the present trajectory, they also list numerous barriers standing in the way of the change required.

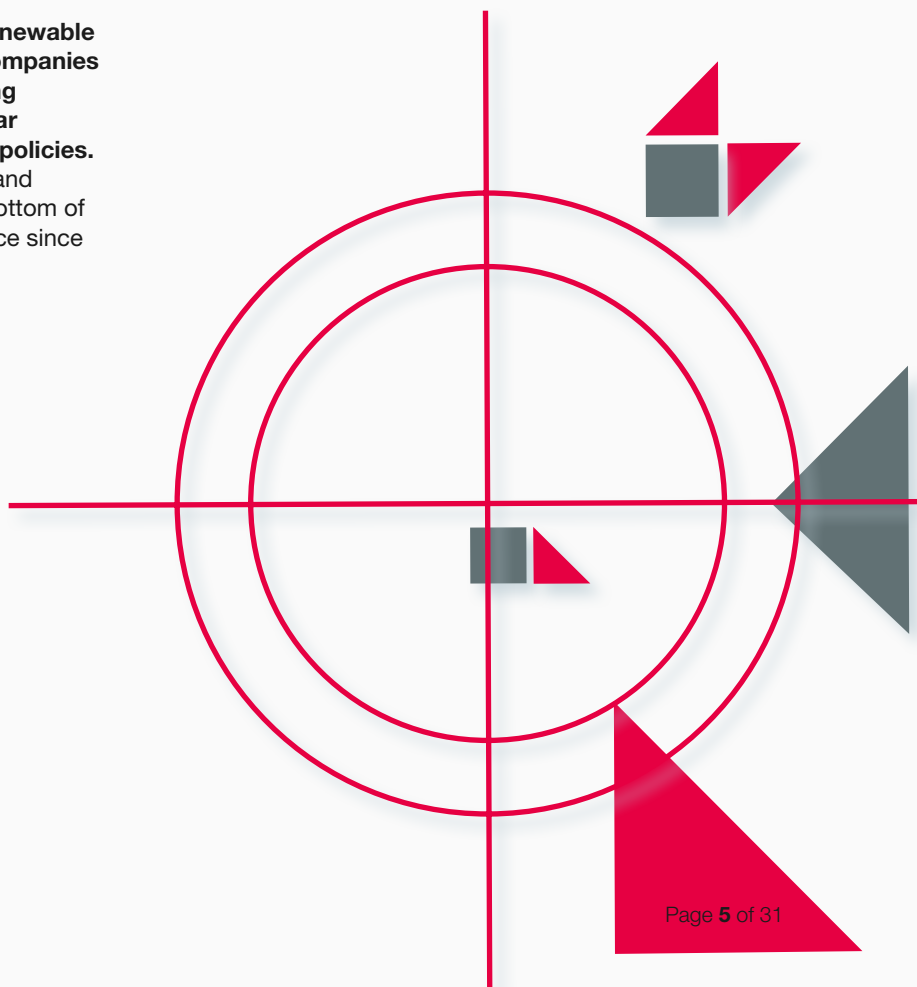
Our expert panel once again states that multiple institutional actors have important roles to play including national governments, the private sector, investors/analysts, and local governments. They also cite specific expectations for the private sector, looking to corporate leaders to lead in setting clear goals and targets, implementing actions at scale, and positively influencing climate-related policy.

The systemic changes needed to turn the dial on climate change cannot be underestimated. Right now, it is essential that we do not lose sight of what is at stake and what must be done.



Key Findings

- ▶ **Seventy percent of experts either believe it is unlikely that we will avert major damage from climate change or believe that major damage has already occurred.** Only one in ten think that major damage can be avoided.
- ▶ **Three-quarters of experts (74%) believe there has been minimal progress on advancing the Paris Agreement goals.** This proportion has increased from 69 percent since the question was first asked in 2017.
- ▶ **Experts continue to believe that the roles of national governments, the private sector, investors/analysts, and local governments are most important for making progress on the goals of the Paris Agreement.** Public unawareness and cultural barriers are cited as posing the greatest threat to the effective implementation of the Paris Agreement goals.
- ▶ **Unilever, Patagonia, Tesla, IKEA, and Google are again named by respondents as climate leaders.** Experts believe that setting goals and targets is the top attribute of companies perceived to be climate leaders, followed by scale of approach and executives speaking out in favor of climate action.
- ▶ **Experts continue to believe that increasing renewable energy use is the most effective means for companies to act on climate change, followed by pursuing science-based targets, the adoption of circular business models, and advocating for climate policies.** Carbon capture and storage, carbon offsetting, and increasing nuclear energy usage remain at the bottom of the list and have declined in perceived importance since our 2019 survey.
- ▶ **A majority of respondents (59%) say companies must be carbon neutral by year 2030 or earlier.** When asked what would make net zero commitments more effective, the top two approaches selected by experts are the need for a universally accepted methodology for setting net zero targets and requirements for short-term targets that will indicate performance advancements on the way to the longer-term goals.
- ▶ **When asked about the most important possible outcomes from COP26, respondents prioritize agreement on the implementation of nature-based solutions.** The second most important outcome cited was agreement on countries' five-year emission reduction plans, followed by reaching agreement on carbon market mechanisms.

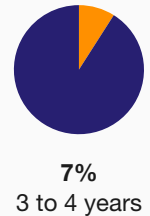
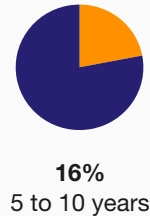
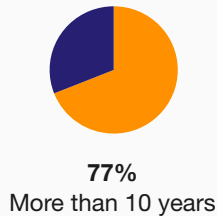


Survey Methodology

Five hundred and sixty-five qualified sustainability experts completed the online questionnaire from August 18 to September 20, 2021. The survey was offered to respondents in Chinese, French, Portuguese, and Spanish, in addition to English.

Experience

Respondents have the following experience working on sustainability issues:



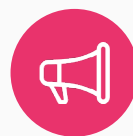
Geography

Experts surveyed span 74 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Views on Climate Progress



Most Believe Major Damage Cannot Be Averted

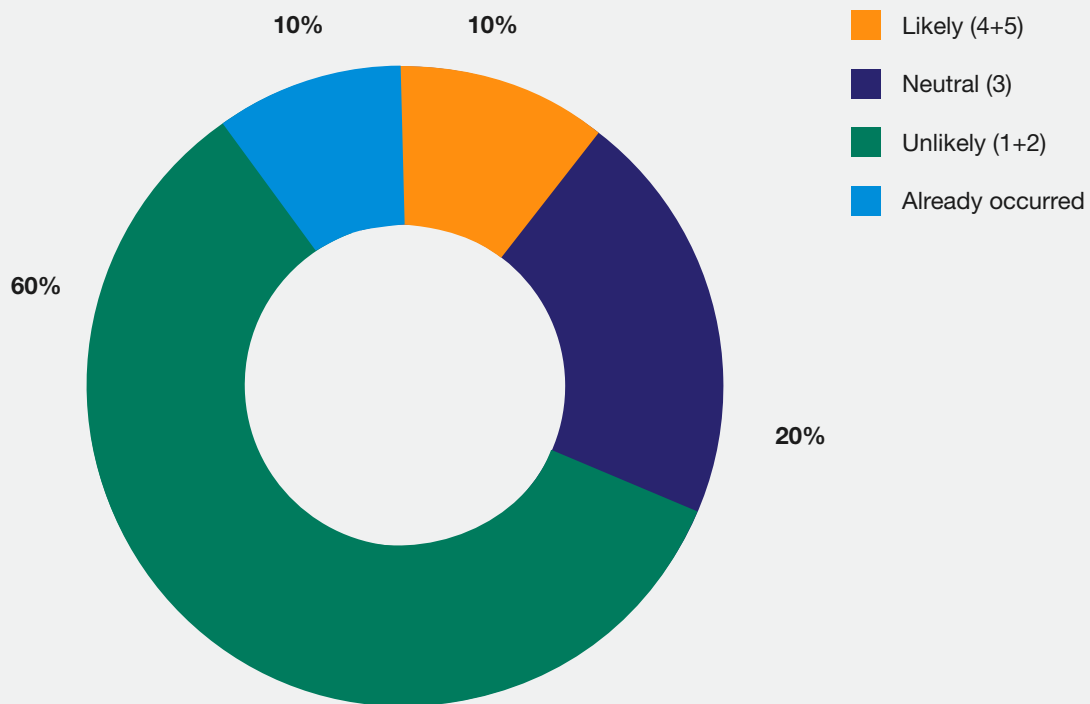
Most experts say it is unlikely that we will avert major damage from climate change, while one in ten say that major damage has already occurred.



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."



● % of Experts, 2021

Pessimism on Climate Progress Is Increasing

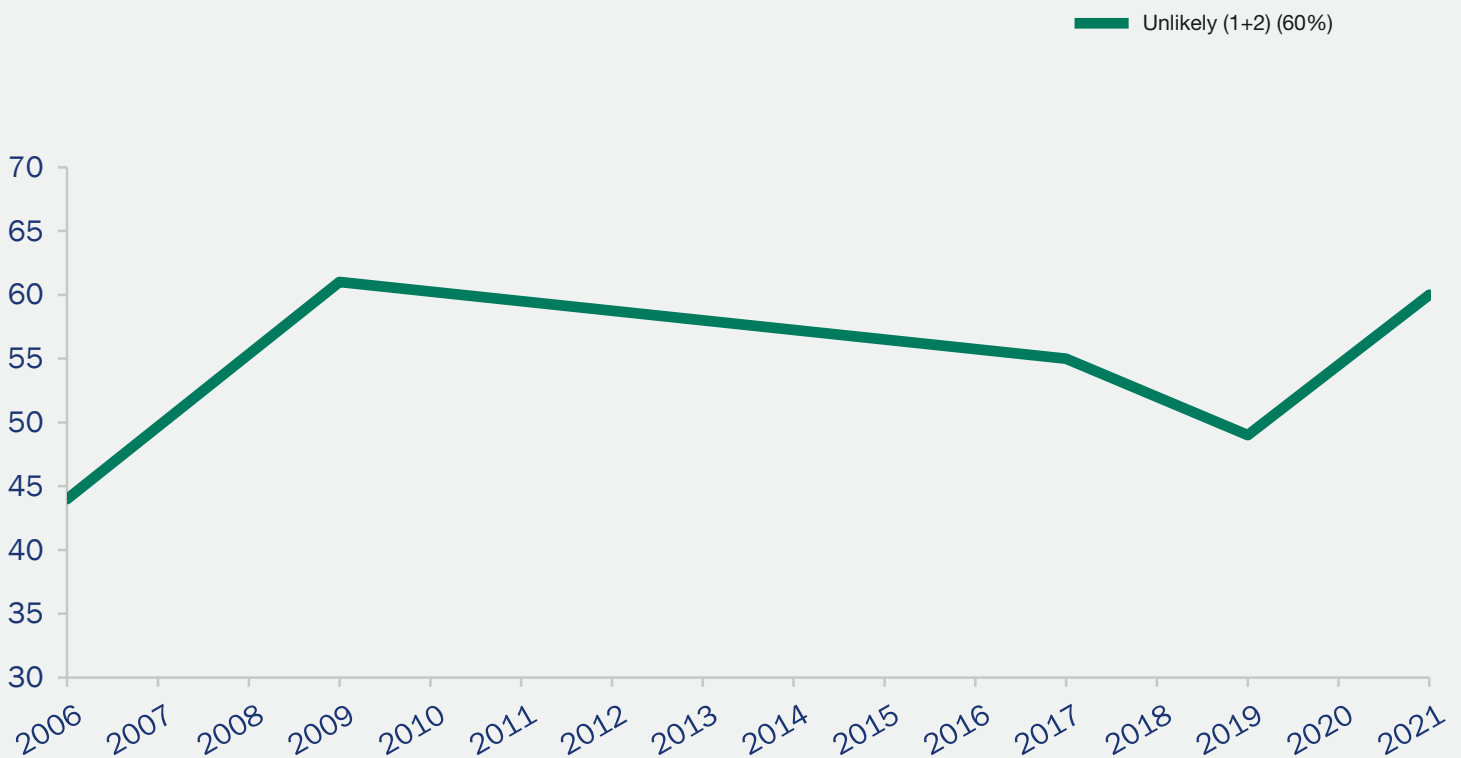
Over the past two years, experts have again become more prone to saying it is unlikely that we can avert irreversible damage, indicating an increasing sense of pessimism about our ability to mitigate the effects of climate change.



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."



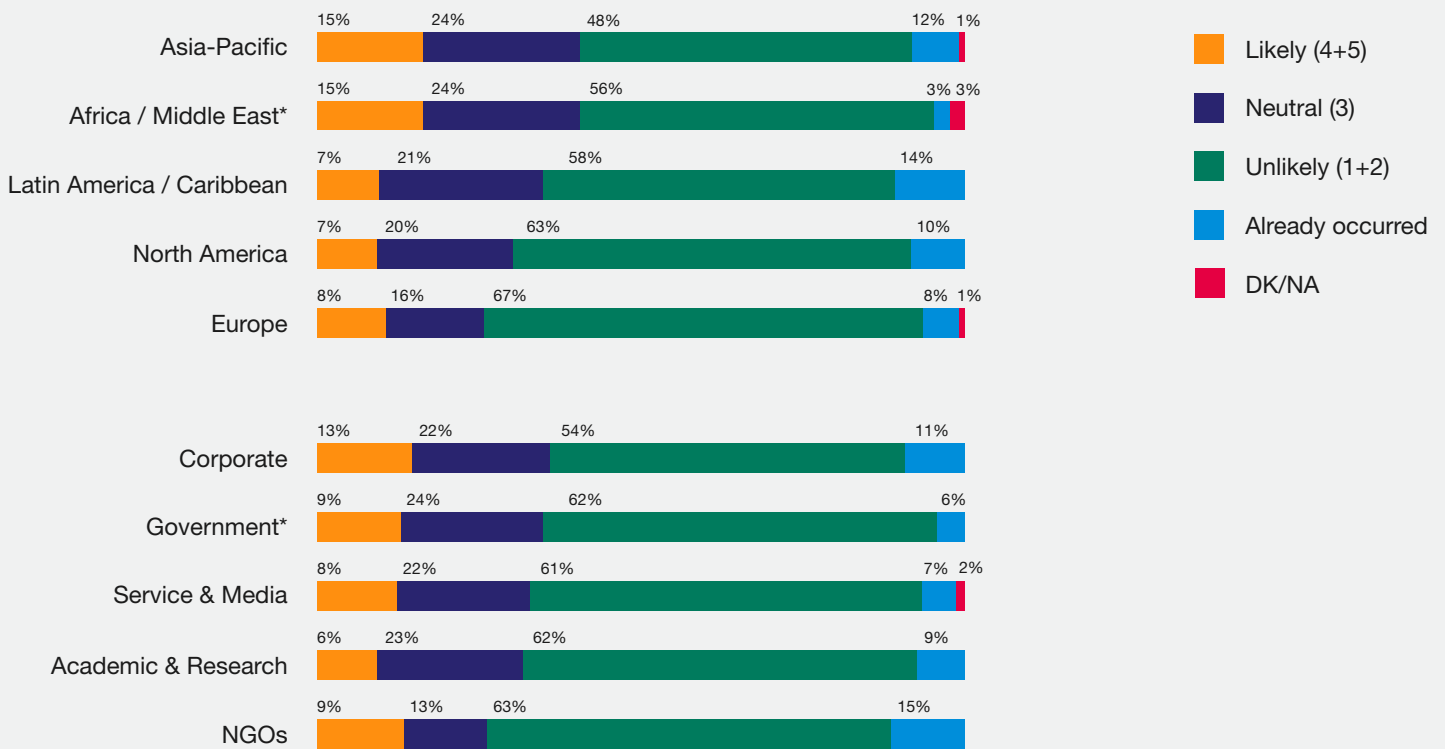
● % of Experts, 2006–2021

Perceptions on Climate Progress Differ across Sectors and Regions

European and North American respondents, respondents in Latin America / Caribbean, and experts working in NGOs are more prone to say it is unlikely that we can avert major damage or that damage has already occurred.



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."



*Small sample size

% of Experts, by Sector and Region, 2021

Advancing Paris Agreement Goals



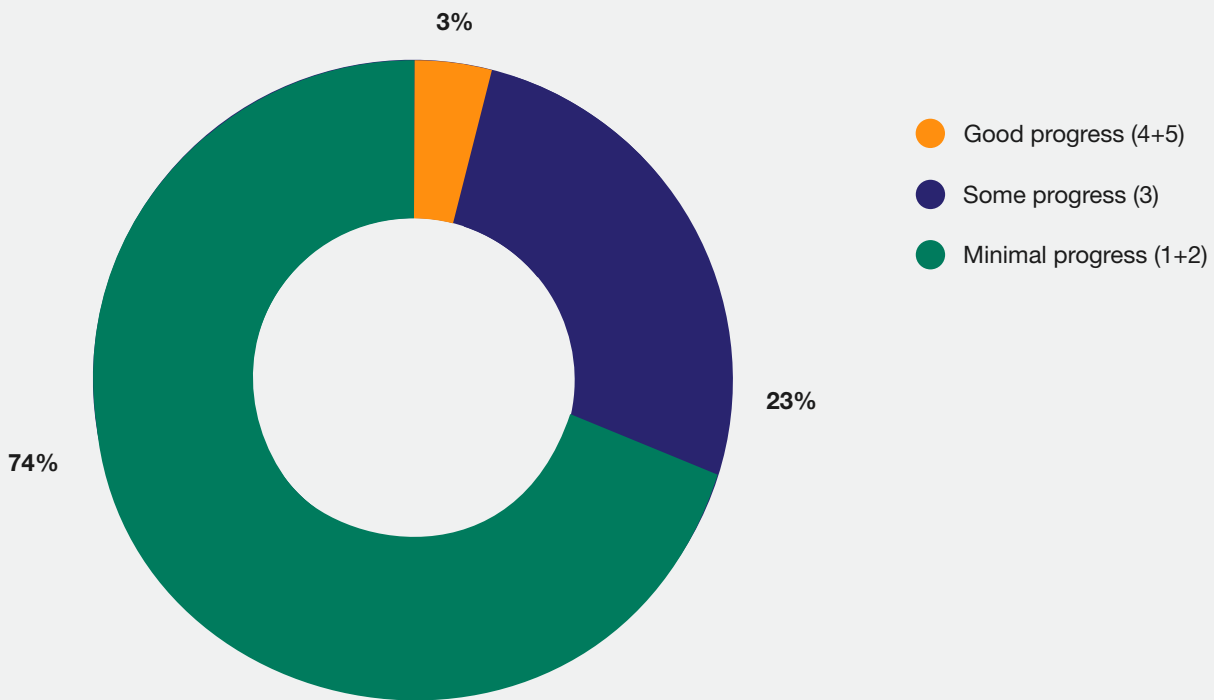
Minimal Progress Perceived on Paris Agreement

Experts have become more likely to say there has been minimal progress on advancing the Paris Agreement climate goals.



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").



Minimal progress



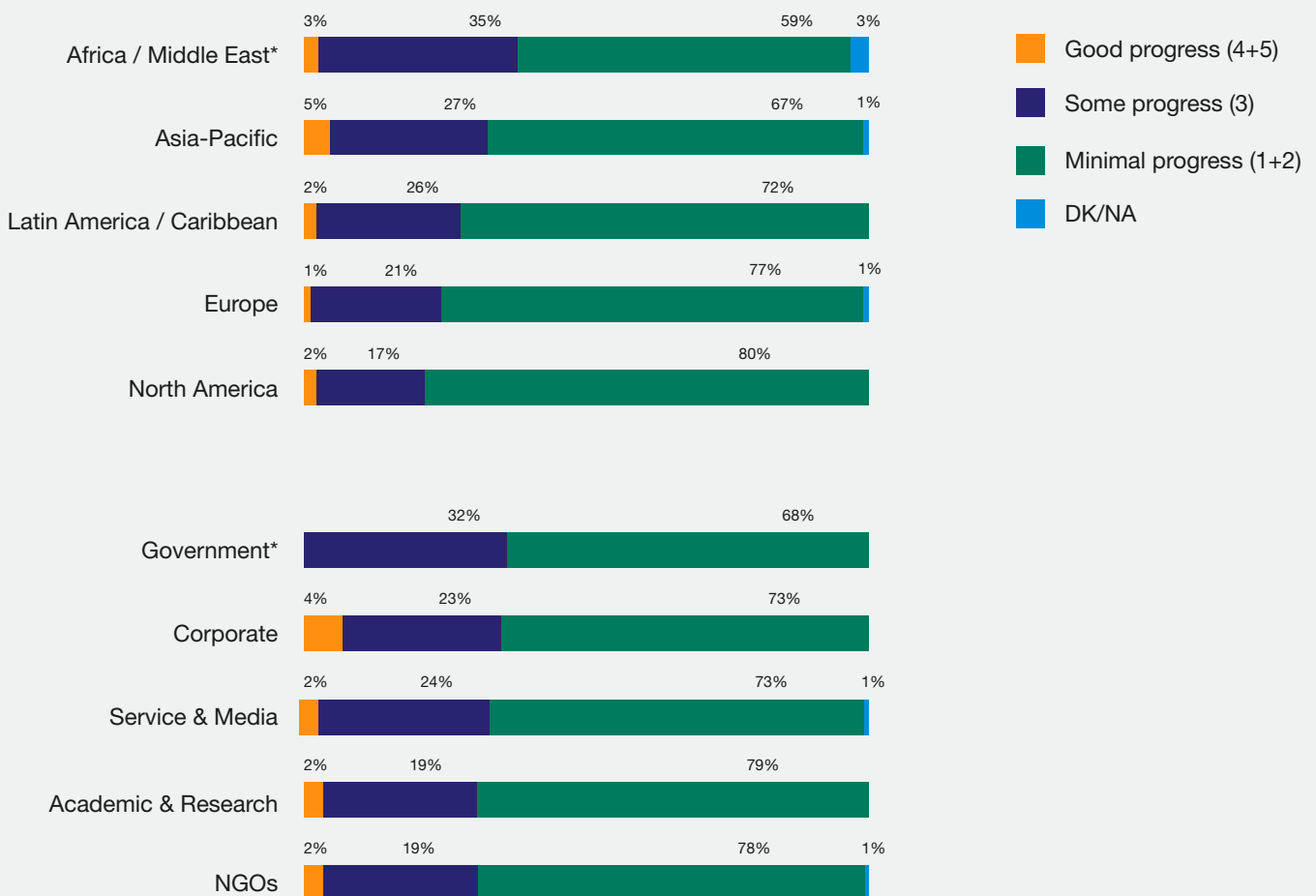
% of Experts, 2021

Views on Progress Differ by Sector and Region

Experts in Europe and North America as well as those in academia/research and NGOs have the most negative views on progress made so far on advancing the Paris Agreement climate goals.



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”).



*Small sample size

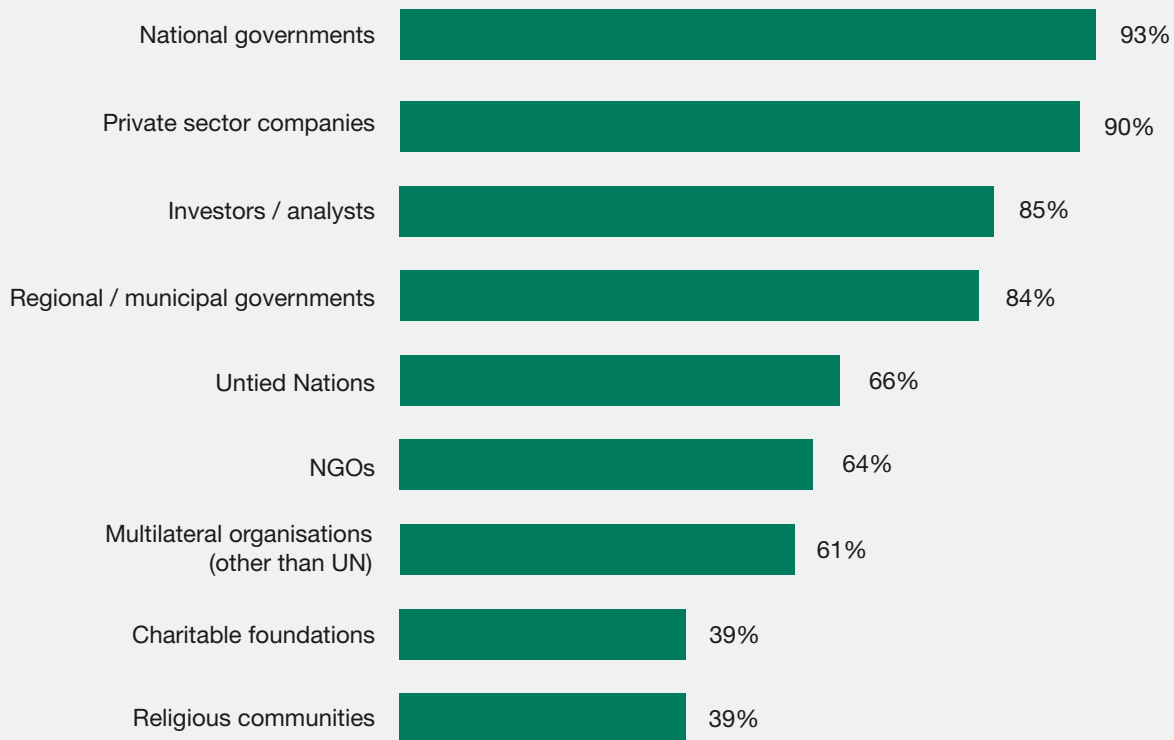
% of Experts, by Sector and Region, 2021

Action by National Governments Most Important for Reaching Paris Goals

Experts believe that the roles of national governments, the private sector, investors/analysts, and local governments are most important for making progress on the Paris Agreement climate goals.



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").



● Important (4+5), % of Experts, 2021

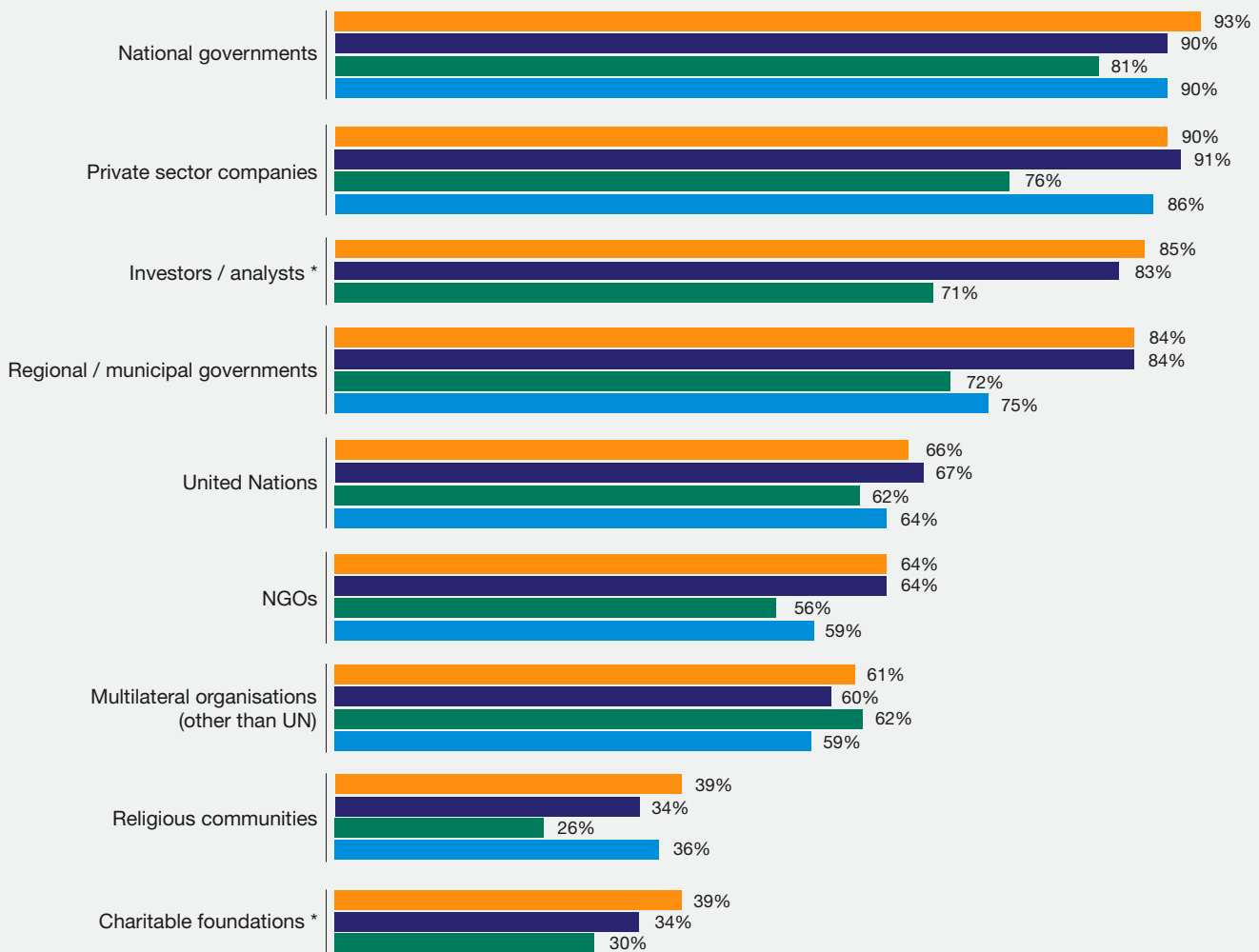
All Sectors Must Contribute to Paris Progress

Experts see nearly all actors as important for making progress on the Paris Agreement climate goals, emphasizing the broad range of action needed. Experts continue to believe that the roles of national governments, the private sector, investors/analysts, and local governments are most important for making progress on the Paris Agreement climate goals.



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”).

2021 2019 2017 2015



*Not asked in 2015

● Important (4+5), % of Experts, 2015–2021

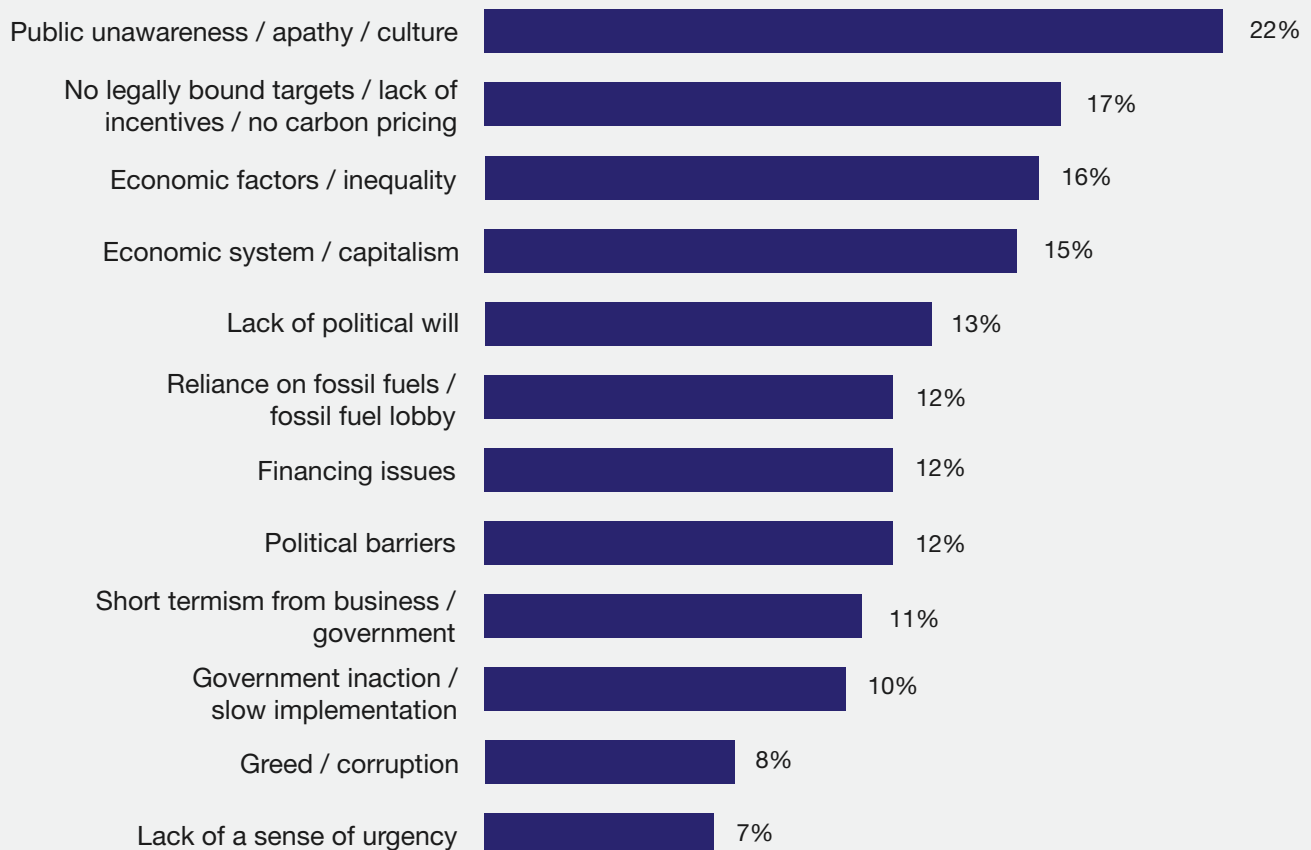
Lack of Public Engagement Perceived as Key Barrier to Paris Goals

Public unawareness, apathy, and cultural barriers are seen by experts as posing the greatest threat to the effective implementation of the Paris Agreement goals.



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.



Unprompted, % of Experts, 2021

Corporate Climate Leadership



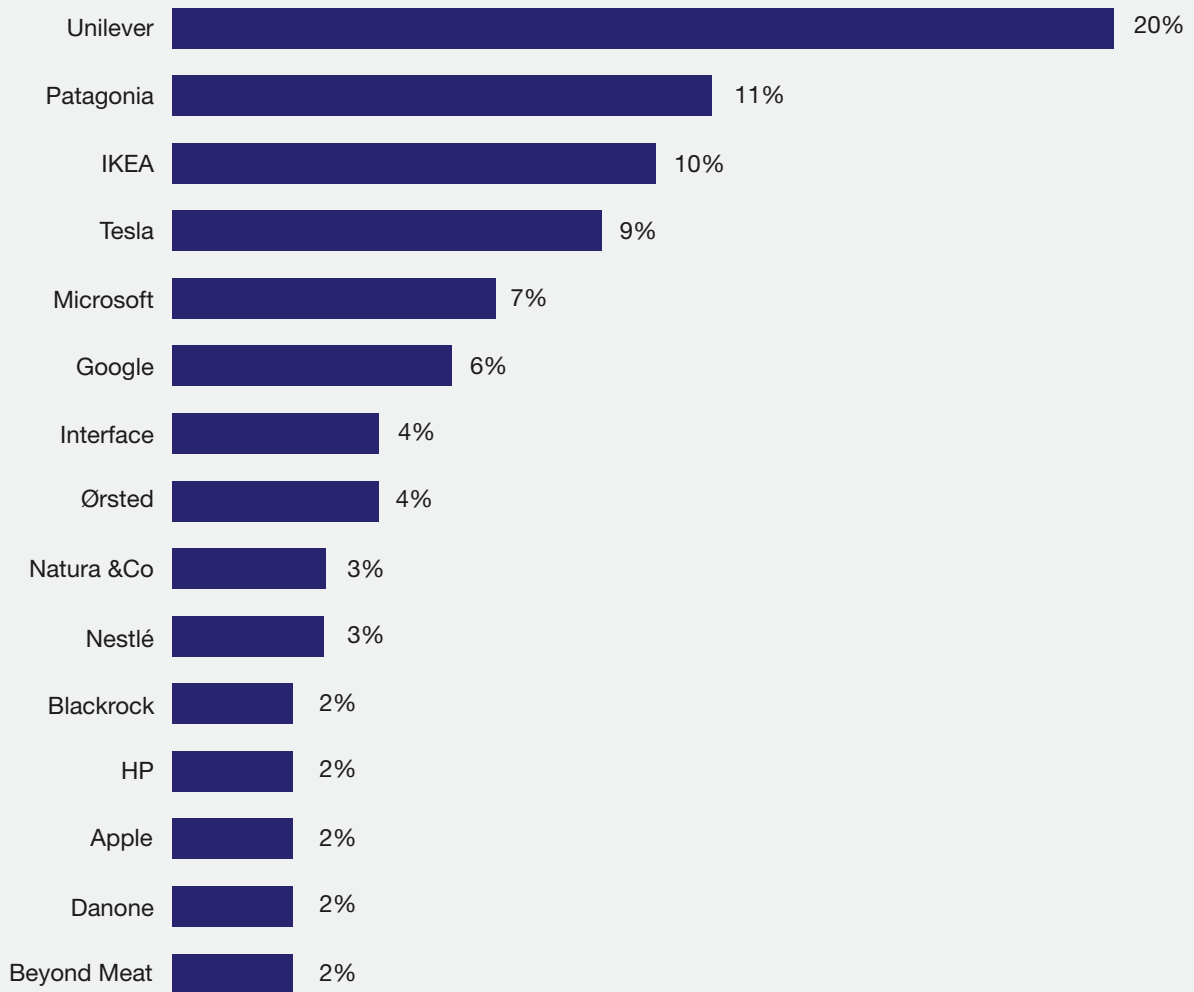
Companies in Range of Industries Named as Climate Leaders

Unilever is seen by experts as the clear corporate leader on climate change, followed by Patagonia, IKEA, and Tesla.



Question

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



● % of Experts, Total Mentions, Unprompted, 2021

Unilever Maintains Lead as Corporate Climate Leader

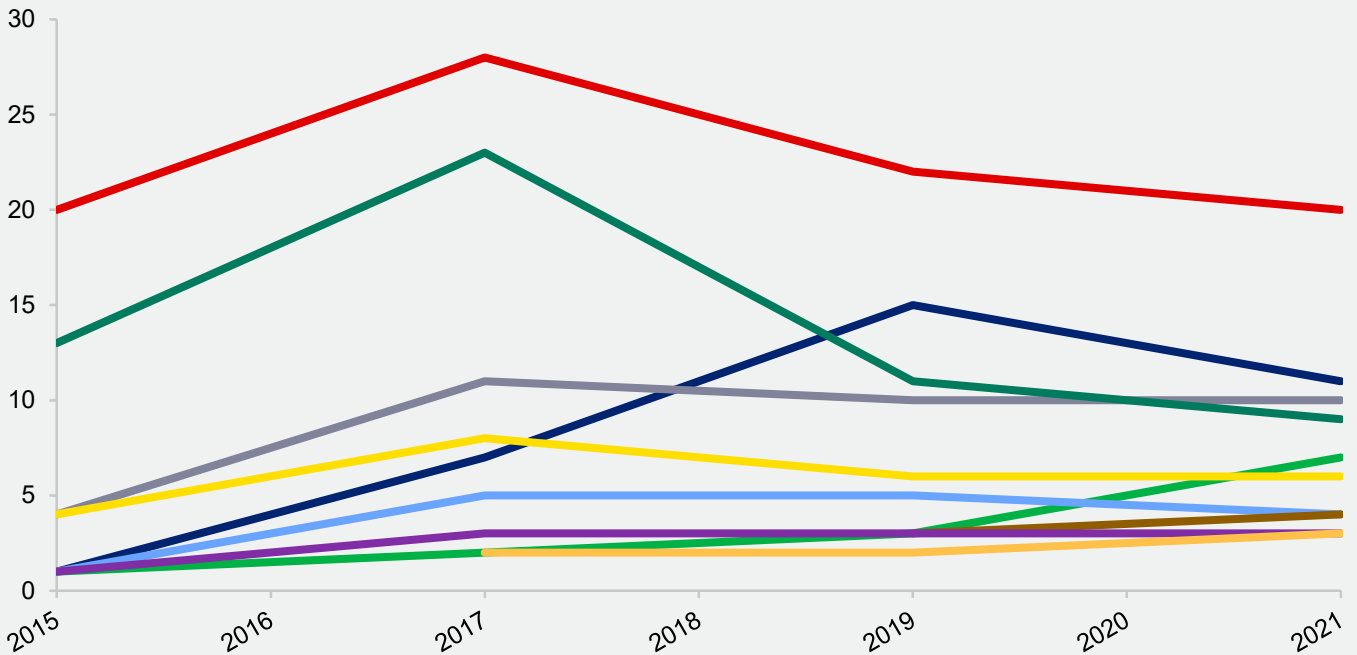
Unilever maintains a leadership position as a recognized corporate climate leader. Recognition of Microsoft has increased over the past two years.



Question

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

*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.



- Unilever (20%)
- Patagonia (11%)
- IKEA (10%)
- Tesla (9%)
- Microsoft (7%)
- Google (6%)
- Ørsted (4%)
- Interface (4%)
- Natura &Co (3%)
- Nestlé (3%)

● % of Experts, Total Mentions, Unprompted, 2015–2021

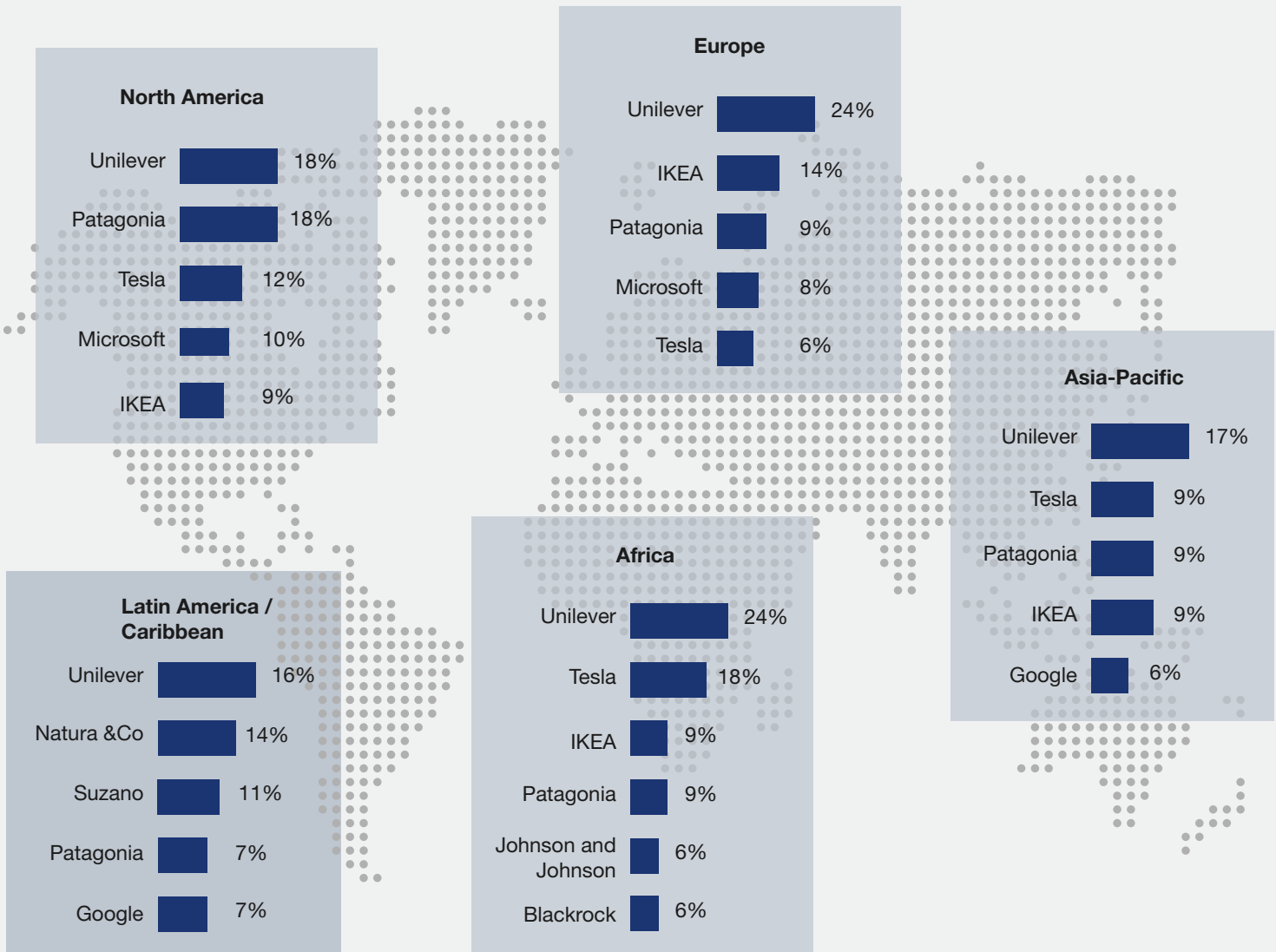
Corporate Climate Leadership Varies by Region

Unilever is the top-ranked corporate climate leader in all regions. Natura and Suzano are highly ranked in Latin America / Caribbean, while Patagonia and Tesla rank highly in North America and Africa, respectively.



Question

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



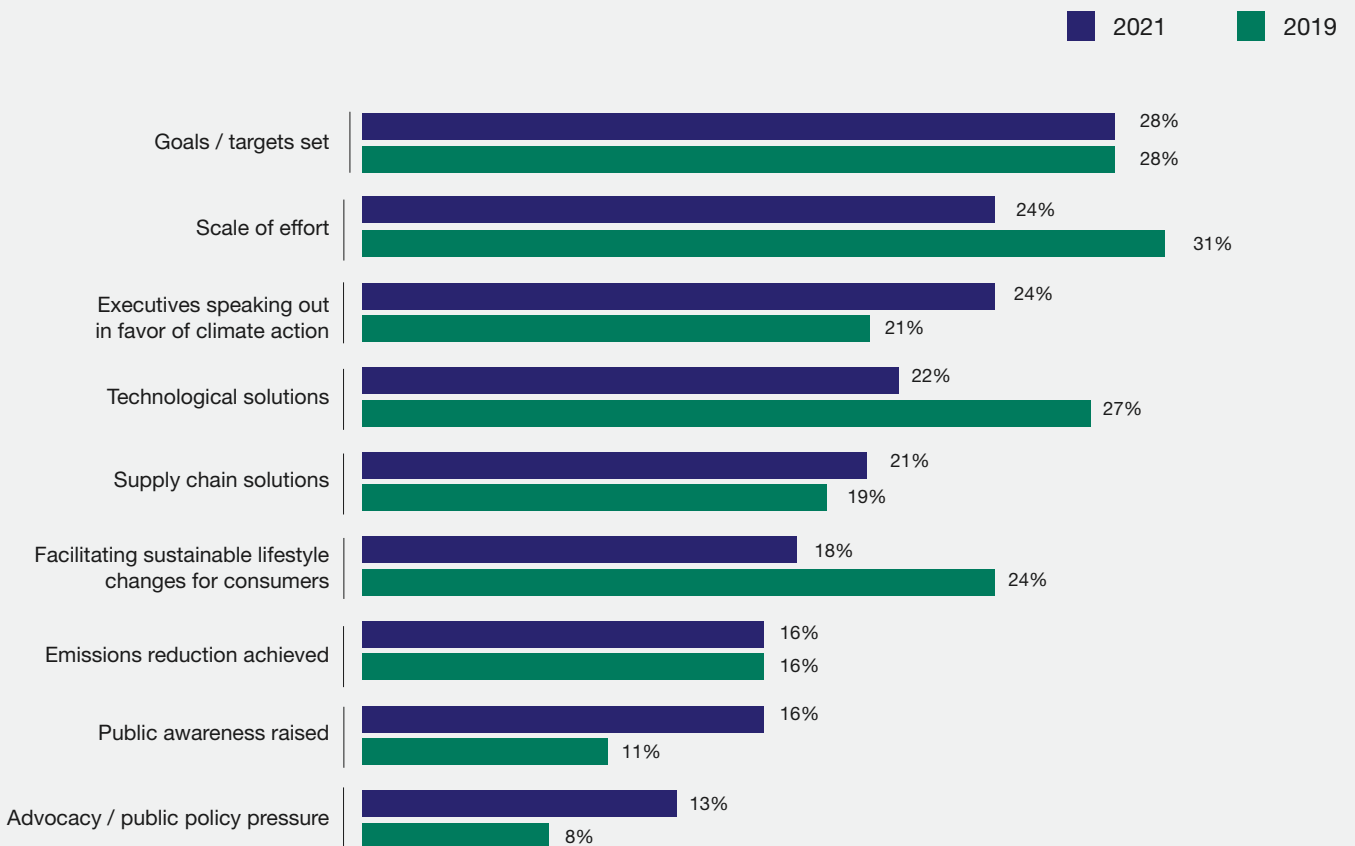
● % of Experts, Total Mentions, Unprompted, by Region, 2021

Corporate Climate Leaders Recognized for their Goals and Targets

Impressive goals and targets most drive recognition for climate leadership among experts asked to pick reasons for naming a corporate climate leader. Executives speaking out in favor of climate action is now tied with scale of effort as the second most-cited reason, up from fifth place in 2019.



Why do you think [INSERT COMPANY #1] is a leader in addressing climate change?
Please pick the two most important reasons from the list below.



● % of Experts, Total Mentions, Prompted, 2019–2021

Corporate Strategies for Climate Solutions

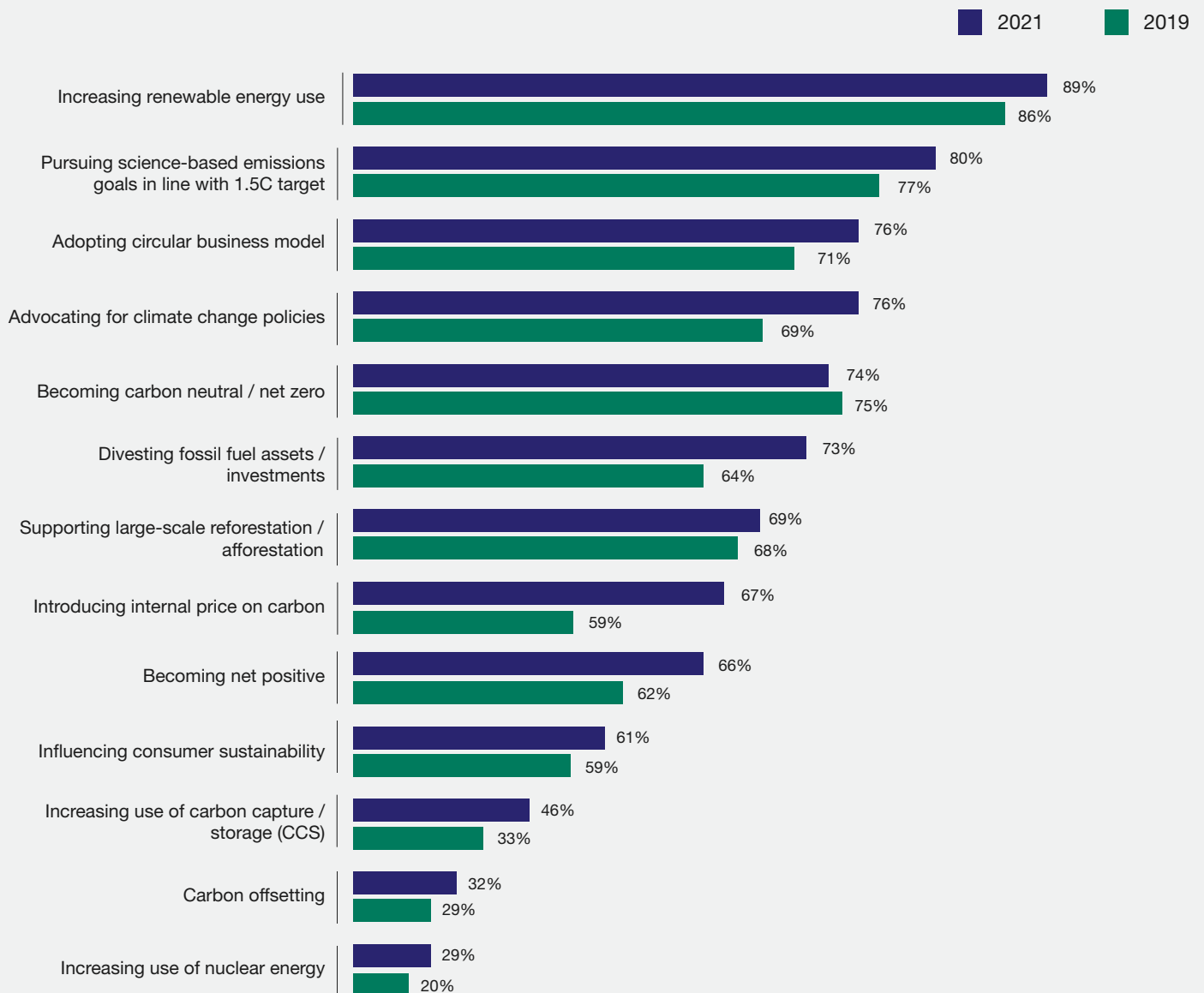


Renewable Energy Use Seen as Most Effective Corporate Strategy for Climate Solutions

Experts continue to believe that increasing renewable energy use is the most effective strategy for companies trying to act on climate change, followed by pursuing science-based targets.



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.”



% of Experts, Effective (4+5), 2019–2021

Renewable Energy Use Tops Recommended Action in all Regions

Increasing renewable energy use is viewed as the top corporate strategy for mitigating climate change in all regions.



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.” Please select one response per item or skip the item if you do not have an answer.

	Africa / Middle East	Asia-Pacific	Europe	Latin America / Caribbean	North America
Increasing renewable energy use	88%	85%	90%	93%	90%
Becoming carbon neutral / net zero	85%	73%	78%	72%	70%
Pursuing science-based emissions goals in line with 1.5C target	76%	77%	79%	74%	85%
Adopting circular business model	82%	76%	76%	86%	72%
Supporting large-scale reforestation / afforestation	76%	74%	64%	79%	65%
Advocating for climate change policies	79%	73%	75%	74%	79%
Divesting fossil fuel assets / investments	68%	71%	75%	82%	71%
Becoming net positive	76%	67%	65%	67%	63%
Influencing consumer sustainability	79%	68%	60%	70%	49%
Introducing internal price on carbon	59%	61%	67%	67%	73%
Increasing use of carbon capture / storage (CCS)	62%	42%	44%	56%	43%
Carbon offsetting	47%	41%	23%	56%	23%
Increasing use of nuclear energy	32%	23%	28%	23%	35%

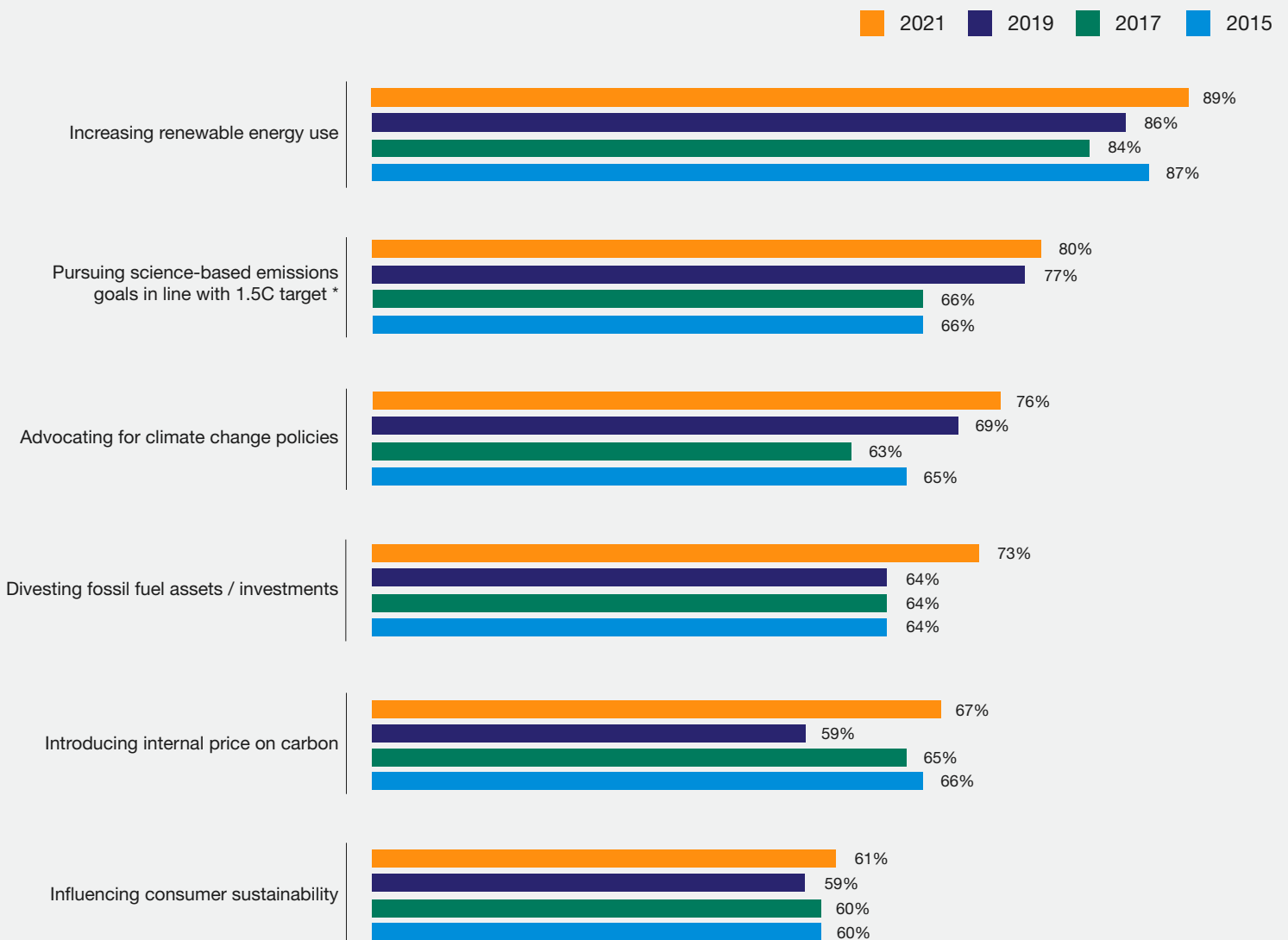
● % of Experts, Effective (4+5), by Region, 2021

Science-based Targets and Climate Advocacy Also Named as Key Actions

As well as increasing renewable energy usage, experts increasingly say that pursuing science-based emissions goals, advocating on policy, and divesting fossil fuel assets and investments are also effective strategies. Experts have also become more likely to say introducing internal carbon pricing is effective, after agreeing less with this approach in 2019.



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.” Please select one response per item or skip the item if you do not have an answer.



* Wording has changed since 2015 (previously 2C target)

% of Experts, Effective (4+5), 2015–2021

Reaching Net Zero



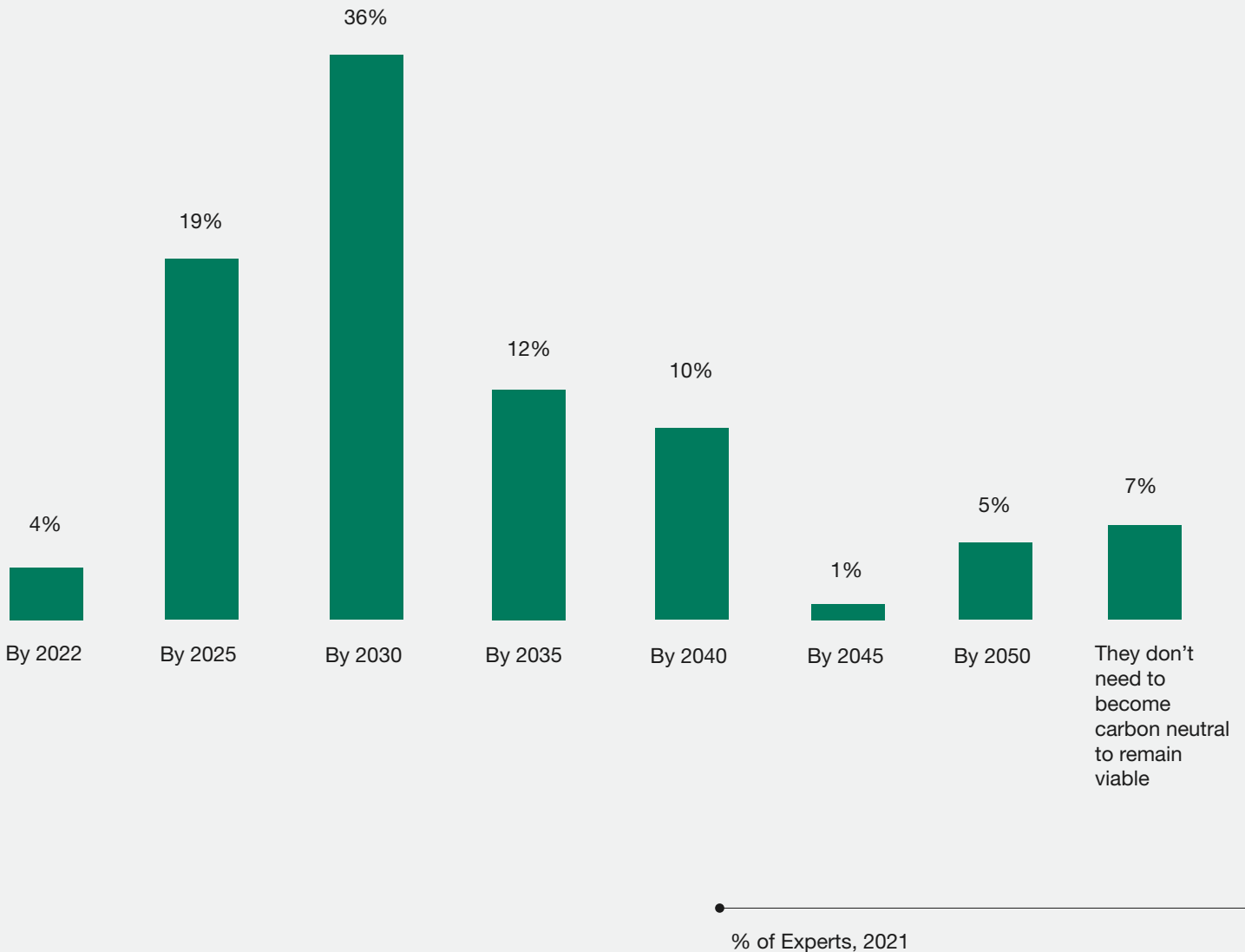
Most Say 2030 or Sooner Is the Deadline for Carbon Neutrality for Companies

A majority of experts (59%) believe that companies need to become carbon neutral by 2030 or sooner to remain competitive.



Question

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



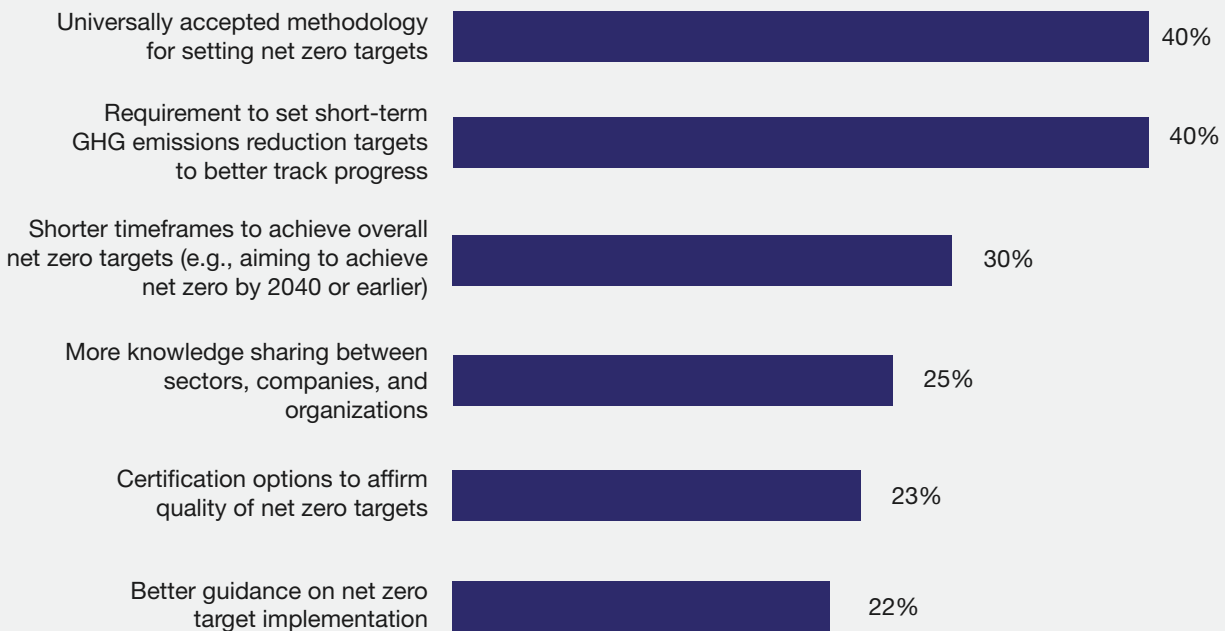
Universal Methodology and Short-term Targets Would Make Net Zero Commitments More Effective

Experts say a universally accepted methodology for setting net zero targets and requirements to set short-term targets to track progress are the top ways net zero commitments can be made more effective.



Question

A growing number of companies, investors, cities, and national governments are announcing net zero targets. Which of the following would make net zero commitments more effective in delivering neutrality in greenhouse gas emissions faster and more efficiently?
Please select at most two actions.



● % of Experts, 2021

COP26



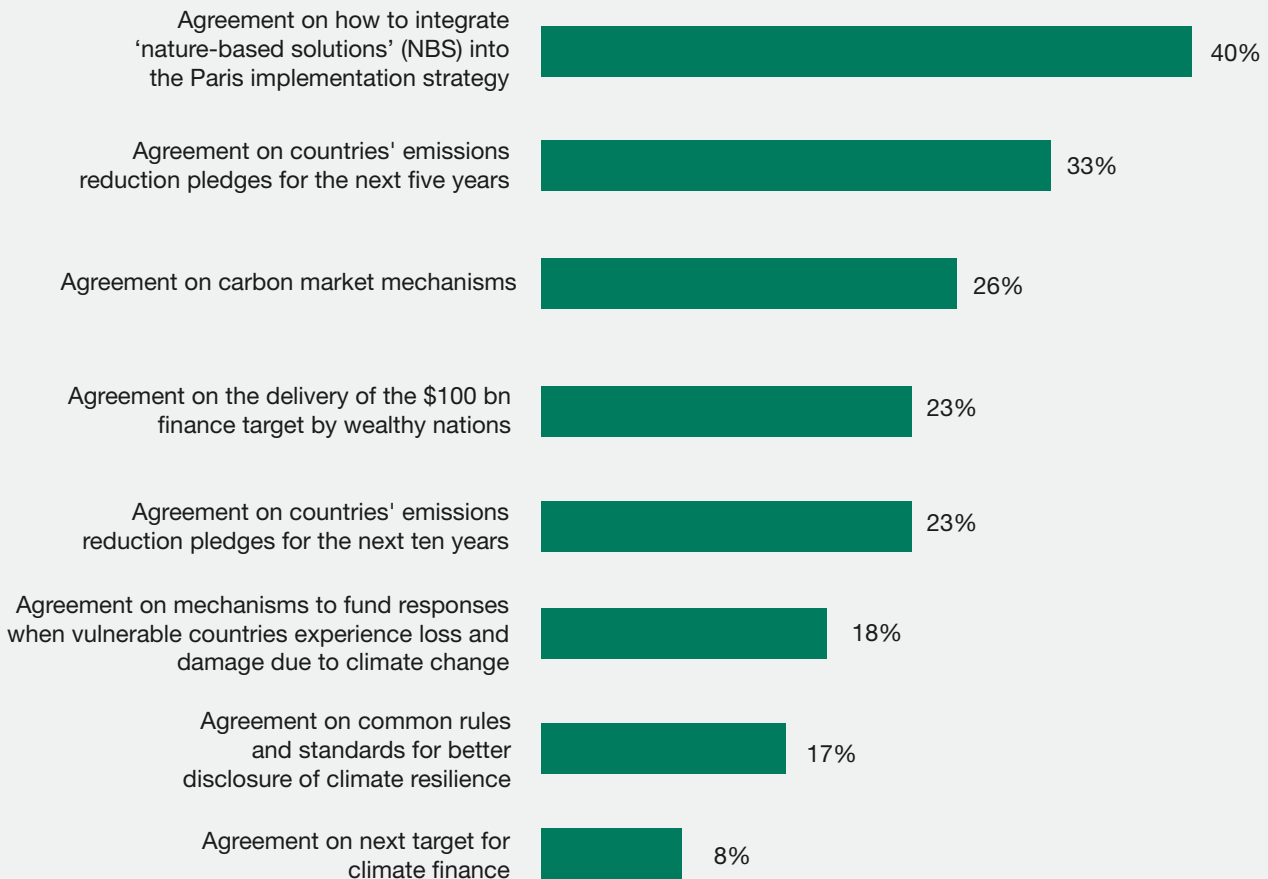
Agreement on Nature-based Solutions Seen as Most Important COP26 Outcome

Experts most want to see agreement on how to implement nature-based solutions, on countries' five-year emission reduction pledges, and on carbon market mechanisms as COP26 outcomes.



Question

The United Nations Climate Change Conference (COP26) is scheduled to be held in November 2021. Please indicate the top two outcomes that you would most like to see achieved at this summit.
Please select at most two outcomes.



● % of Experts, 2021



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