

GlobeScan-SustainAbility Survey 2021

Evaluating Progress on the SDGs



Contents

Introduction

page 3



Survey Methodology

page 4



Key Findings

page 5



Society's Progress on Sustainable Development

page 6



Progress on Individual SDGs

page 9



Urgency and Attention Given to Specific Goals

page 13



Impact of the Pandemic on the SDGs

page 19



Introduction

This report explores the results of the third GlobeScan-SustainAbility Survey (GSS) evaluating progress on the Sustainable Development Goals (SDGs or the Goals).

The Goals were agreed by the United Nations member states in 2015 with input from civil society and business, setting forth a blueprint to achieve a better and more sustainable future for all by 2030. Five years later, with many Goals not on track to be achieved, the UN has called for the 2020s to become the ‘decade of action’ to build the momentum needed to address the SDGs and ensure progress on the greatest planetary challenges.

This particular GSS report marks a milestone in that it is the first in the GSS series produced by GlobeScan and the SustainAbility Institute by ERM. The Institute was established in October 2020, following SustainAbility’s acquisition by ERM in 2019. After many years of joint work between GlobeScan and SustainAbility, we look forward to continuing our collaborative effort to track expert opinions on sustainable development challenges, with the Institute now taking SustainAbility’s place as GlobeScan’s partner.

In 2017 and 2019, we polled sustainability experts and asked them to evaluate progress on sustainable development and specifically the SDGs. Experts responded that society’s progress on sustainable development had been poor.

Two years later, we have again asked experts to evaluate progress on individual Goals, rank their relative urgency, and share insights into the priorities within their own organizations. This year we also asked how experts felt the pandemic would affect progress on the SDGs.

Just under 500 sustainability professionals from North America, Europe, Asia-Pacific, Latin America, and Africa responded to our survey. Throughout this report, we draw comparisons between this year’s findings and the data we collected in 2017 and 2019.

Polled experts continue to agree that society’s progress on sustainable development broadly and the SDGs specifically has been inadequate. The number of respondents who believe progress on sustainable development is poor has returned to the same level recorded in our 2017 survey, reversing the slight improvement in this trend that was observed in 2019. *Life Below Water*, *Reduced Inequalities*, *Life on Land*, and *No Poverty* continue to be singled out by respondents as the SDGs where society’s level of achievement has lagged most.

Experts continue to call out *Climate Action* as the most urgent Goal for society to focus on. While progress on this Goal is seen as increasing, and while it remains the Goal that receives the most attention in respondents’ own organizations, *Climate Action* continues to be viewed by experts as the Goal where society is failing to make adequate progress relative to its urgency. While not perceived to be as urgent as *Climate Action*, four other Goals saw increased levels of perceived urgency in comparison to 2019: *Reduced Inequalities*, *Quality Education*, *Zero Hunger*, and *Good Health and Well-being*.

Although around one-third of experts believe that the pandemic will serve to accelerate SDG advancement, over 50 percent believe COVID-19 and its economic impacts will slow society’s progress toward achieving the SDGs over the coming decade.

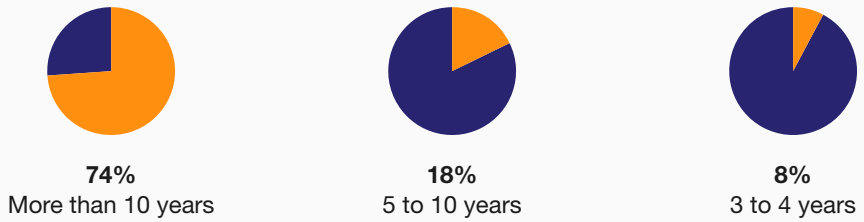
These 2021 survey findings underline the urgency felt by global experts around taking action to achieve the SDGs and highlight the inadequate progress made to date. With less than ten years left until 2030, we hope that these findings will encourage stakeholders to accelerate action on the systemic solutions and actions needed to deliver all that the SDGs promise.

Survey Methodology

496 qualified sustainability experts completed the online questionnaire from October 26th to December 21st, 2020.

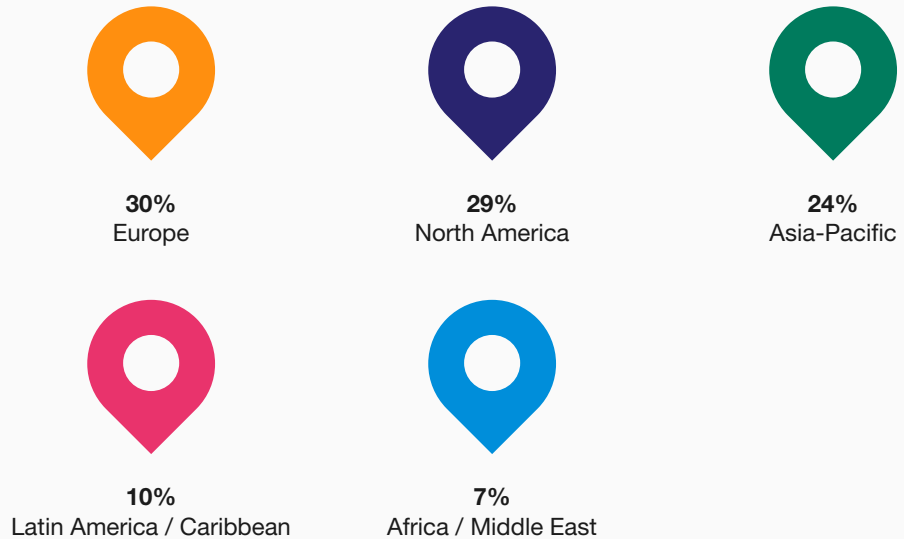
Experience

Respondents have the following experience working on sustainability issues:



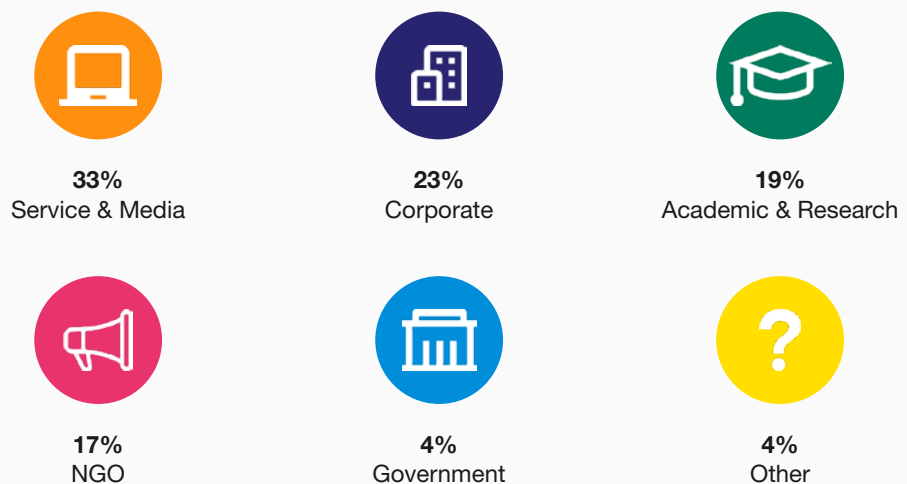
Geography

Experts surveyed span 75 countries in the following regions:



Sectors

Respondents were drawn from the following sectors:



Key Findings

- ▶ **Sustainability professionals continue to be critical about overall progress made on sustainable development.** The proportion of experts who say progress has been poor has increased from 49 percent to 54 percent over the past two years, with European experts and those working in the Academic and Research sectors being the most negative about global progress.
- ▶ **When asked to rate society's performance in having achieved progress toward each one of the SDGs, all are rated as predominantly poor.** Progress on *Industry, Innovation and Infrastructure* and *Partnership for the Goals* are rated the most positively, while *Reduced Inequalities*, *Life on Land*, and *Life Below Water* are rated the most negatively.
- ▶ **Experts agree that *Climate Action* is the most urgent of the Sustainable Development Goals.** When asked to pick the three SDGs that require the most urgent action, 61 percent choose *Climate Action*, followed by *Life on Land*, *Reduced Inequalities*, and *Sustainable Production and Consumption* (each mentioned by 22 percent of respondents). Overall, experts view the Goals where the most perceived progress has been made as relatively less urgent.
- ▶ ***Climate Action* also continues to be the SDG receiving the most attention within respondents' own organizations across almost all regions and sectors.** *Responsible Consumption and Production* and *Quality Education* are also priorities, with the latter receiving the most attention of the Goals among experts in Academia and Research and among those based in Africa and the Middle East. *Climate Action*, *Responsible Consumption and Production*, and *Quality Education* are all also viewed as relatively urgent Goals. However, other relatively urgent Goals, including *Reduced Inequalities* and *Life on Land*, receive relatively little attention.
- ▶ **When asked how the COVID-19 pandemic and its economic impacts will affect society's progress toward achieving the SDGs over the coming decade, half of experts say it will slow progress.** While as many as 54 percent believe that the outbreak will impede advancement, 36 percent instead say it will accelerate positive change. Only one in ten say it will not make any difference.



Society's Progress on Sustainable Development



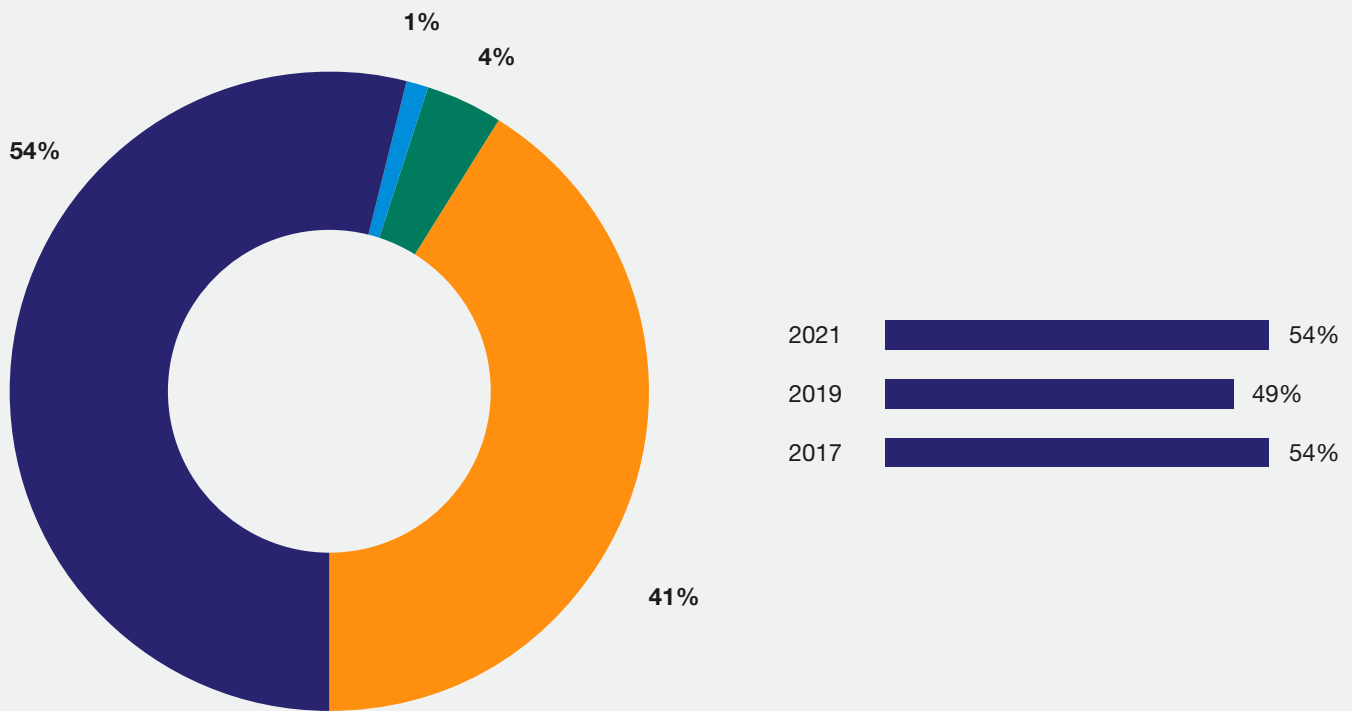
Experts Remain Critical of Progress

Just over half of experts surveyed say that progress made to date on sustainable development has been poor. This proportion has increased slightly compared to 2019 and is now at the same percentage as in 2017. As many as four in ten experts have a neutral view, while only four percent believe that progress has been excellent.



Question

How would you rate the progress made to date in the transition to sustainable development globally? *Please use the 5-point scale provided (where 1 is "very poor" and 5 is "excellent").*



- Excellent (4+5)
- Neutral (3)
- Poor (1+2)
- DK/NA

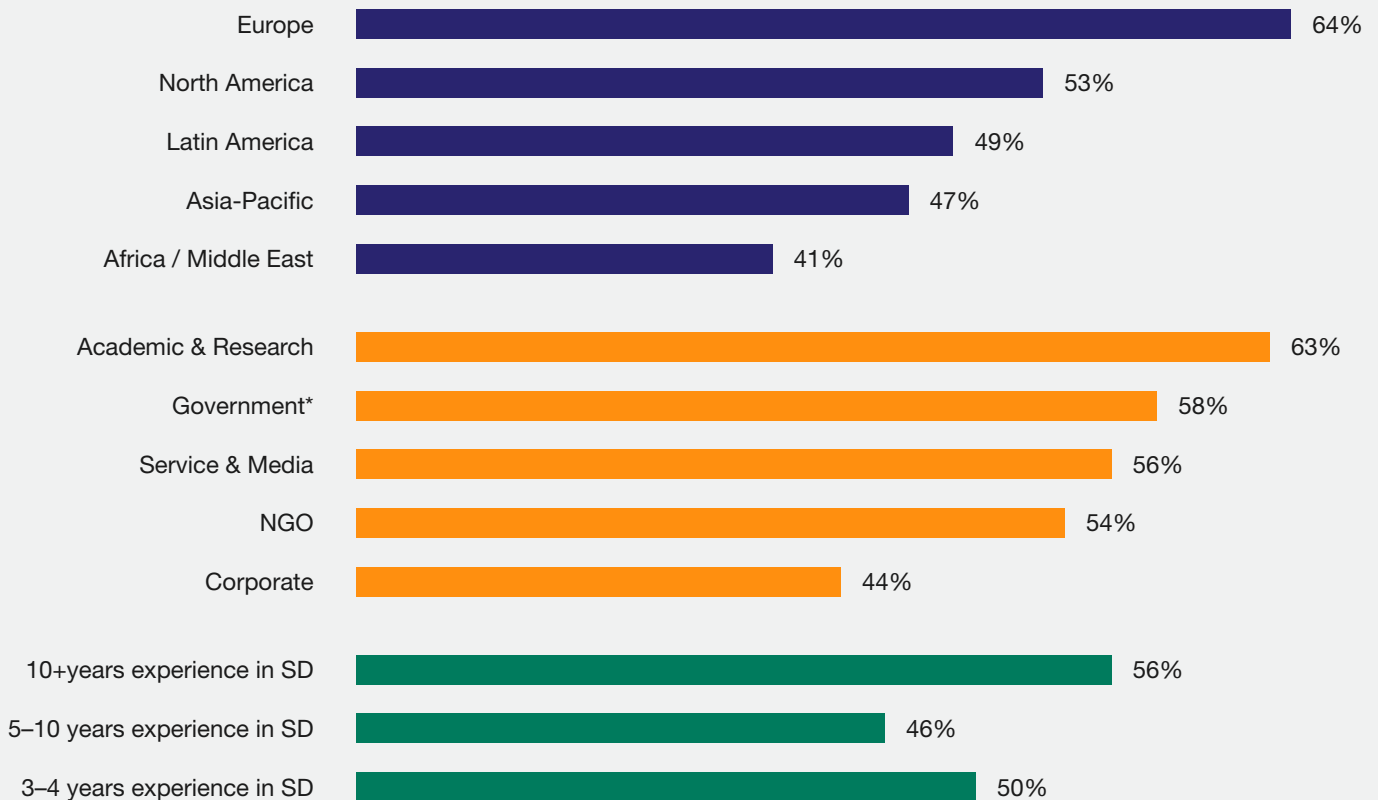
● "Poor" (1+2),
All Respondents, 2017–2021

Negative Perceptions on Progress Vary Based on Region, Sector, and Experience

European experts, those working in Academia and Research, and experts with more than ten years of experience in the sustainable development field are the most likely to say that progress has been poor. Corporate sustainability professionals are less negative in their assessment than those who are active in other sectors.



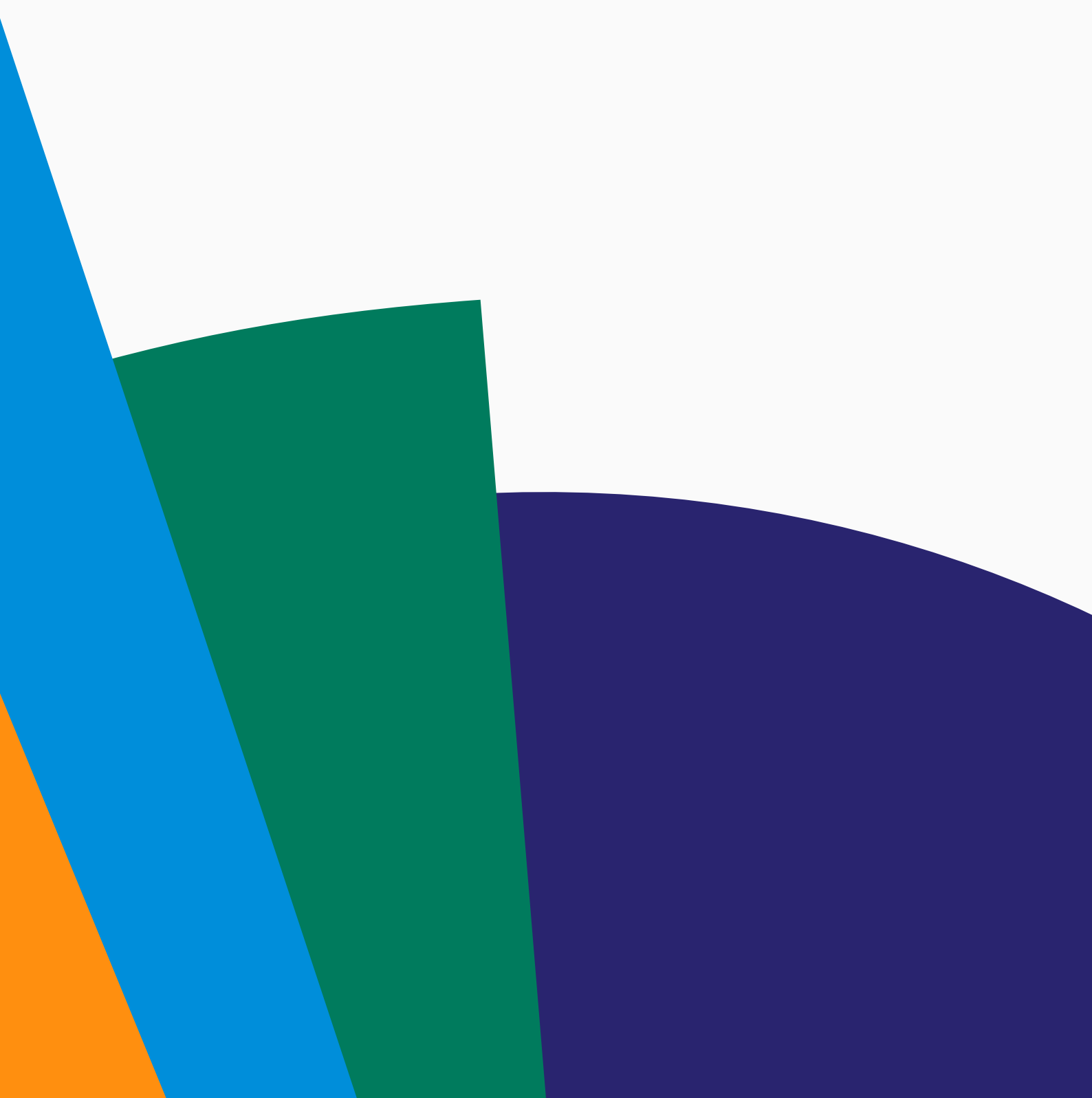
How would you rate the progress made to date in the transition to sustainable development globally? *Please use the 5-point scale provided (where 1 is "very poor" and 5 is "excellent").*



“Poor” (1+2), by Region, Sector and Years of Experience, 2021

*Small sample size (n=19)

Progress on Individual SDGs

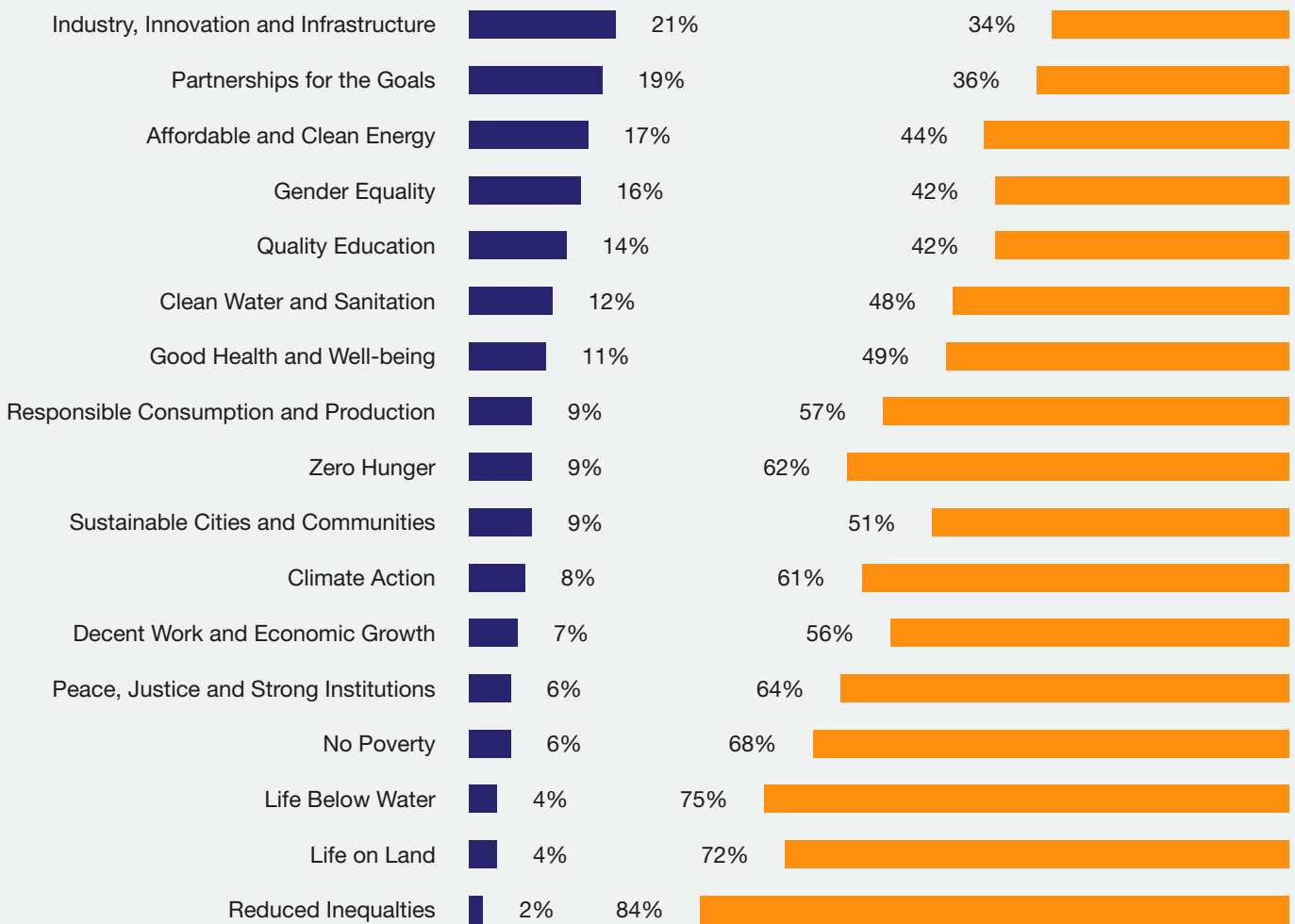


Progress on All SDGs Seen as Poor

Experts continue to rate progress on each individual SDG as poor rather than good. Progress on *Reduced Inequalities*, *Life on Land*, and *Life Below Water* is rated most negatively, while efforts on *Industry, Innovation and Infrastructure* and *Partnerships for the Goals* are seen as having made the most progress.



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").



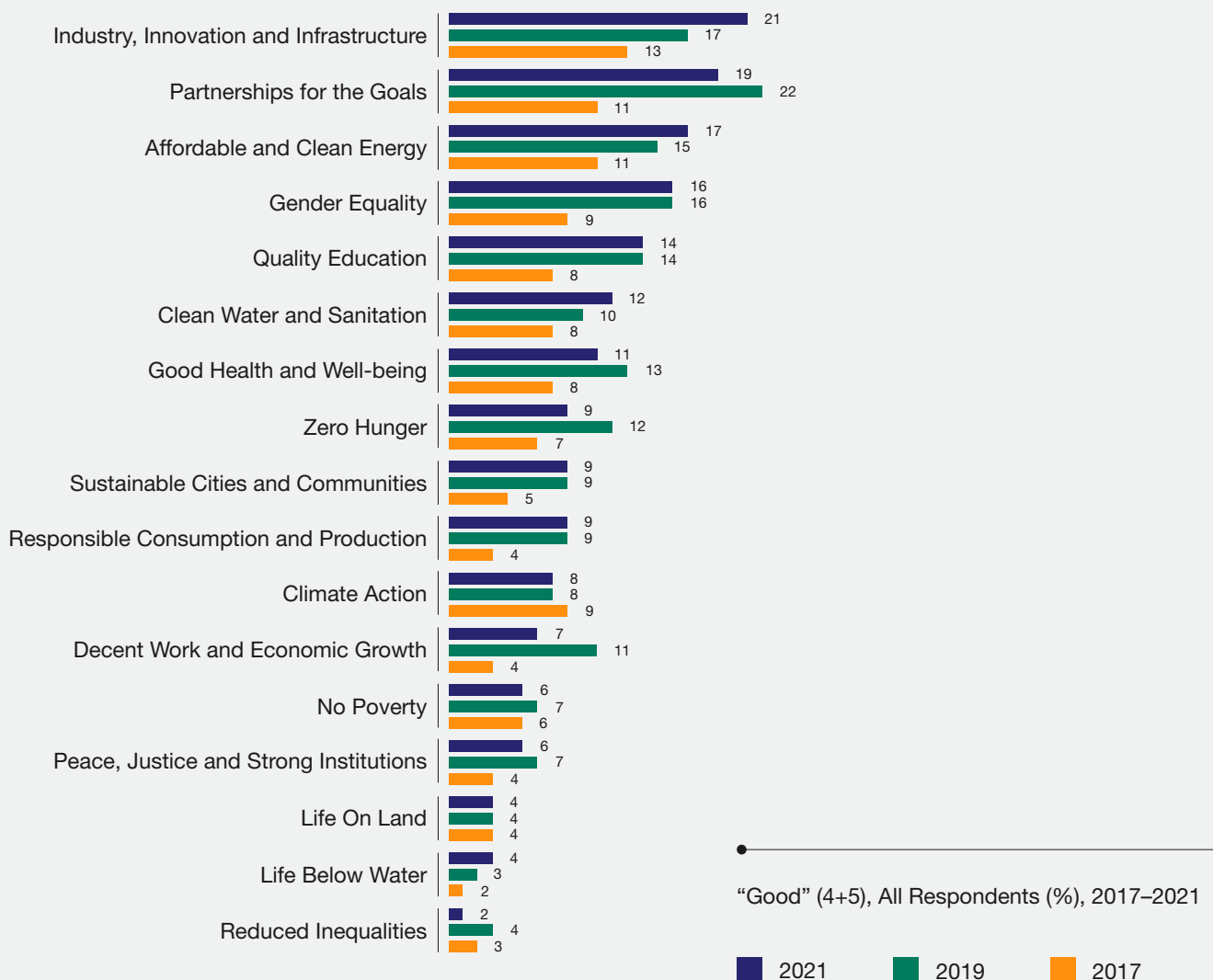
All respondents, 2021 ■ Good (4+5) ■ Poor (1+2)

Experts More Positive Than in 2019 About Progress on Several SDGs

The proportion of experts that view progress on individual SDGs positively has increased since 2019 for a few of the Goals: *Industry, Innovation and Infrastructure*, *Affordable and Clean Energy*, and *Clean Water and Sanitation*. Perceived progress decreased notably on three of the Goals: *Partnerships for the Goals*, *Zero Hunger*, and *Decent Work and Economic Growth*.



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").



Industry, Innovation and Infrastructure Has Achieved Most Progress

Industry, Innovation and Infrastructure is now seen by experts as the Goal that has achieved the most progress, switching positions with Partnerships for the Goals which has moved down to second place. As in 2017 and 2019, Reduced Inequalities and Life Below Water continue to be regarded as the Goals where least progress has been made.



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").

	2021 Rank Order (most progress = 1)	2019 Rank Order (most progress = 1)	2017 Rank Order (most progress = 1)	Change (2019 to 2021)
Industry, Innovation and Infrastructure	1	2	1	1
Partnerships for the Goals	2	1	2	-1
Gender Equality	3	4	8	1
Quality Education	4	3	4	-1
Affordable and Clean Energy	5	6	5	1
Clean Water and Sanitation	6	7	7	1
Good Health and Well-being	7	5	3	-2
Sustainable Cities and Communities	8	8	9	0
Decent Work and Economic Growth	9	9	10	0
Responsible Consumption and Production	10	12	13	2
Climate Action	11	13	6	2
Zero Hunger	12	10	11	-2
Peace, Justice and Strong Institutions	13	11	12	-2
No Poverty	14	14	15	0
Life on Land	15	15	14	0
Life Below Water	16	16	16	0
Reduced Inequalities	17	17	17	0

Mean Scores, All Respondents, 2017–2021

Urgency and Attention Given to Specific Goals



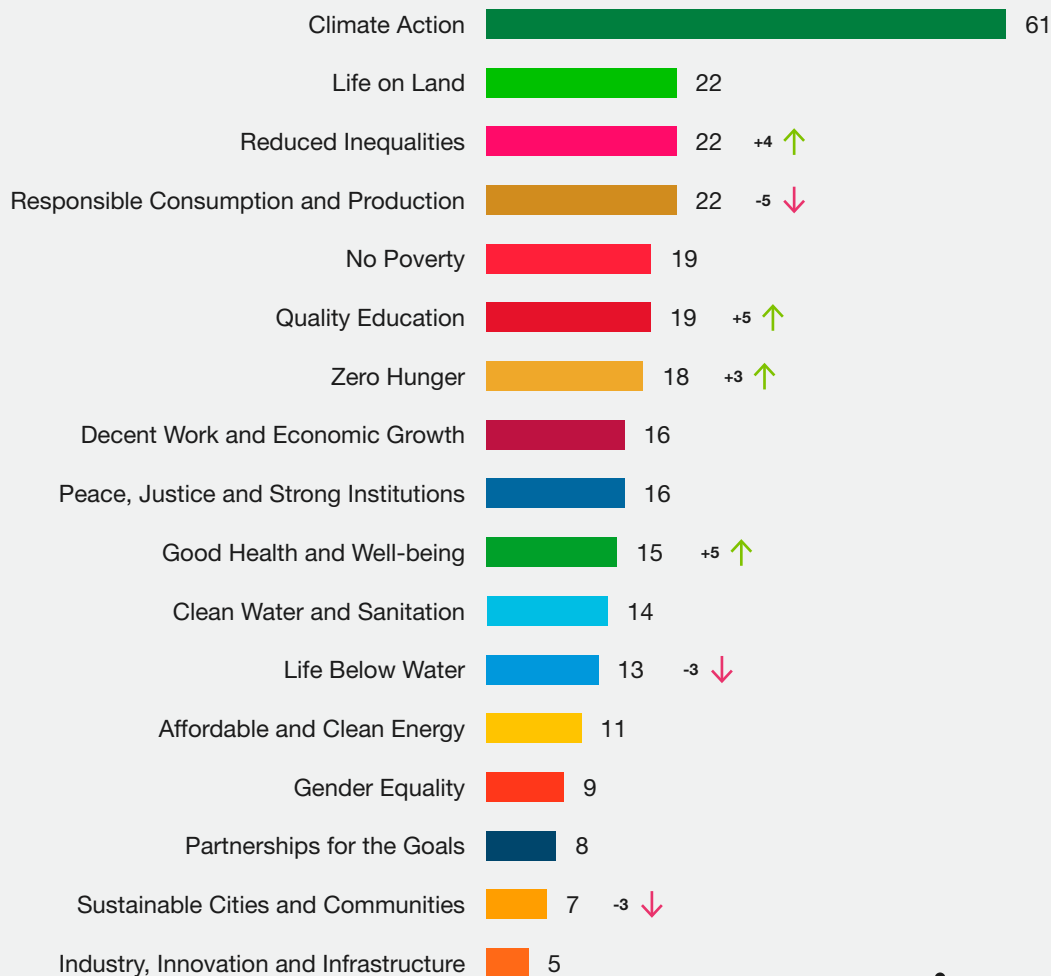
Climate Action Viewed as the Most Urgent Goal

Climate Action continues to be the SDG identified as requiring the most urgent action. Life on Land, Reduced Inequalities, and Responsible Consumption and Production are tied in perception as the second most urgent Goals, with Reduced Inequalities having increased in perceived urgency compared to 2019. Other Goals that have increased in perceived urgency include Quality Education, Zero Hunger, and Good Health and Well-being. Industry, Innovation and Infrastructure continues to be seen by experts as the Goal requiring the least urgent action.



Question

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, All Respondents (%), 2019–2021

Climate Action Viewed as Most Urgent by All Stakeholder Audiences

Experts of all types agree *Climate Action* is the most urgent SDG. *Climate Action* is also seen as the most urgent priority by respondents from all regions except for Africa and the Middle East, where respondents now rank *Quality Education* as the most critical Goal.



Question

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

	Most urgent Goal	2 nd Most urgent Goal
Government*	58% Climate Action	32% No Poverty
NGO	54% Climate Action	26% Life on Land
Academic & Research	54% Climate Action	31% Reduced Inequalities
Corporate	59% Climate Action	25% Life on Land
Service & Media	70% Climate Action	24% Responsible Consumption and Production
Asia-Pacific	59% Climate Action	21% Zero Hunger
Africa/Middle East	38% Quality Education	35% Peace, Justice and Strong Institutions
Europe	62% Climate Action	26% Life on Land
North America	72% Climate Action	23% Reduced Inequalities
Latin America	51% Climate Action	35% Reduced Inequalities

Most Urgent Goals, Total Mentions
(Ranked #1 or #2), All Respondents, 2021

*Small sample size (n=19)

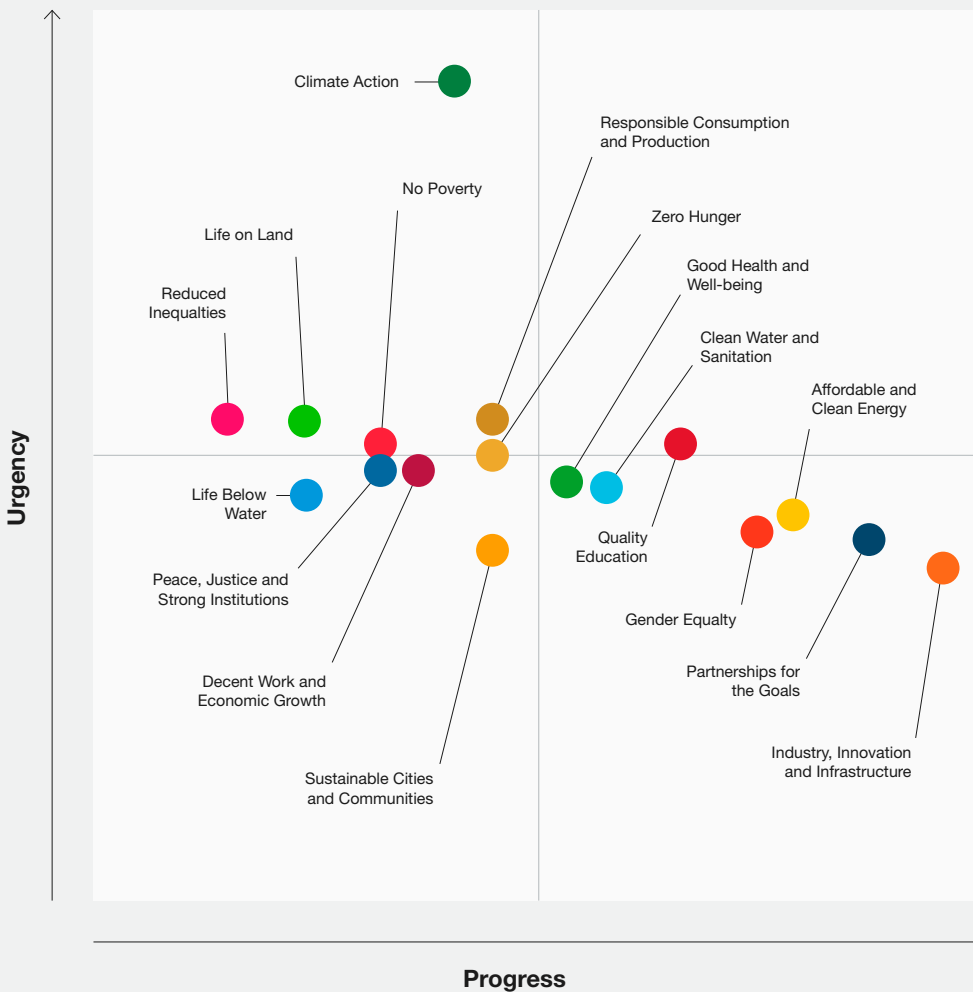
Most Urgent Goals are Making Less Progress

This scatter plot compares each SDG's perceived urgency to the progress that experts perceive society has made on it so far. *Climate Action* stands out as a Goal where society is failing to make adequate progress relative to its urgency. *Quality Education* is the only SDG landing in the upper right quadrant given relatively high perceived urgency and above average progress achieved. The Goals where experts view society as having performed best, *Industry, Innovation and Infrastructure* and *Partnership for the Goals*, are also among the Goals they consider least urgent.



Question

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"). Which three Sustainable Development Goals (SDGs) do you think require the most urgent action? Please choose at most three Goals.



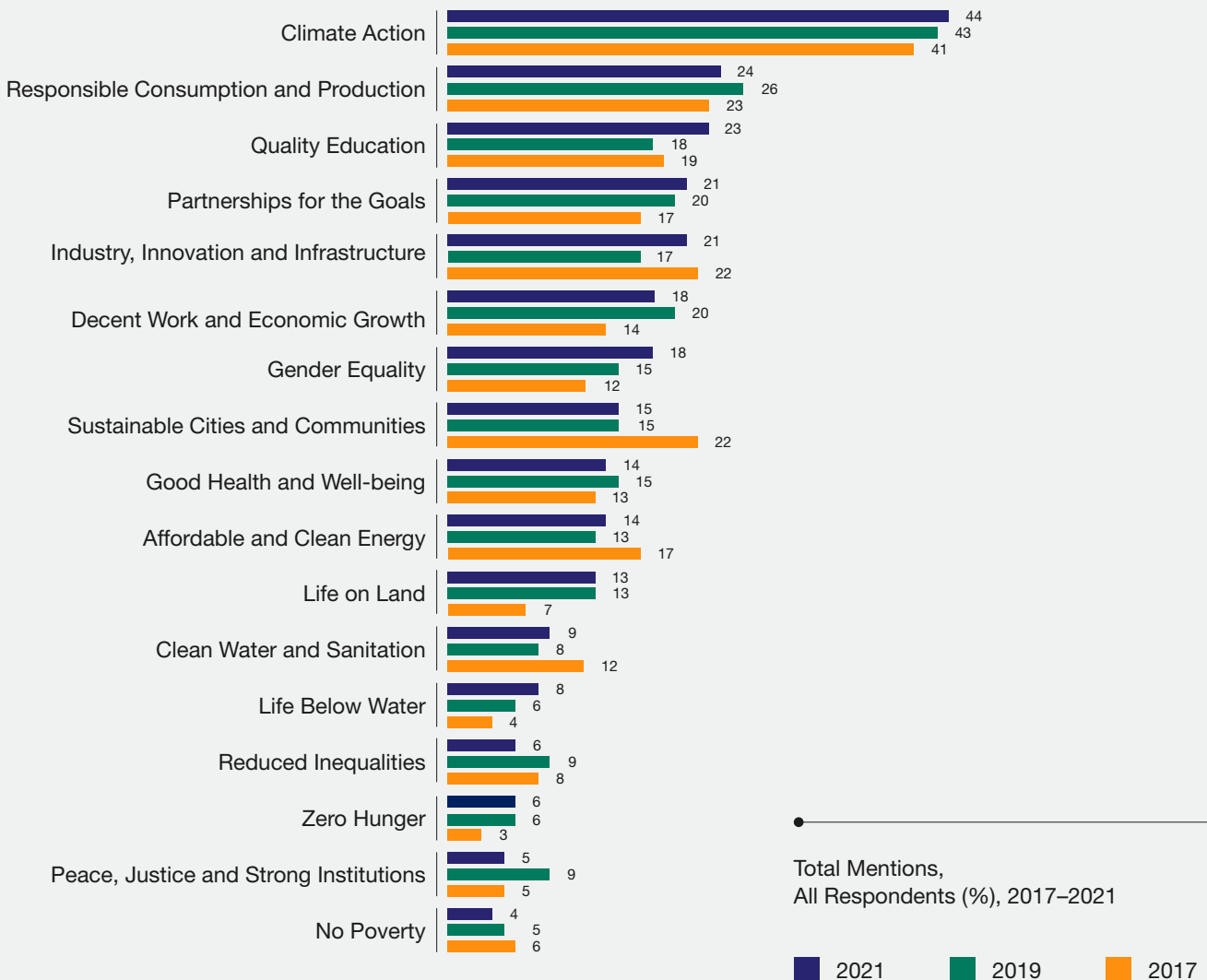
Perceived Urgency vs Progress Achieved, All Respondents, 2021

Climate Action Receives Most Attention Within Organizations

Experts again mention *Climate Action* most often when asked which Goals receive the most attention in their own organizations. *Responsible Consumption and Production* is also frequently mentioned, while *Quality Education* and *Gender Equality* are increasingly seen as priorities. Few respondents mention *No Poverty*, *Peace, Justice and Strong Institutions*, *Zero Hunger*, *Reduced Inequalities*, or *Life Below Water*. *No Poverty*, *Peace, Justice and Strong Institutions*, and *Reduced Inequalities* are mentioned less frequently as priorities compared to 2019.



Which of the Sustainable Development Goals (SDGs), if any, receive the most attention within your own organization (or within your own work if more applicable)?
Please choose at most three Goals.



Climate Action and Responsible Consumption and Production Receive Most Attention Across Regions and Sectors

Respondents across most sectors and regions prioritize *Climate Action* in their own organizations or work. This is not true in the Academic and Research sector or among those based in Africa and the Middle East, both of whom focus more on *Quality Education*. Secondary priorities vary across sectors and regions.



Which of the Sustainable Development Goals (SDGs), if any, receive the most attention within your own organization (or within your own work if more applicable)?
Please choose at most three Goals.

	Goal receiving most attention	Goal receiving 2 nd most attention
Government*	37% Climate Action	26% Clean Water and Sanitation 26% Industry, Innovation and Infrastructure
NGO	38% Climate Action	29% Partnerships for the Goals
Academic & Research	49% Quality Education	38% Climate Action
Corporate	52% Climate Action	26% Good Health and Well-being
Service & Media	46% Climate Action	32% Responsible Consumption & Production
Asia-Pacific	47% Climate Action	23% Responsible Consumption & Production 23% Partnerships for the Goals
Africa/Middle East	32% Quality Education	26% Gender Equality
Europe	43% Climate Action	34% Responsible Consumption & Production
North America	53% Climate Action	21% Industry, Innovation and Infrastructure 21% Quality Education
Latin America	35% Climate Action	31% Quality Education

Priority Goals, Total Mentions
(Ranked #1 or #2), All Respondents, 2021

*Small sample size (n=19)

Impact of the Pandemic on the SDGs

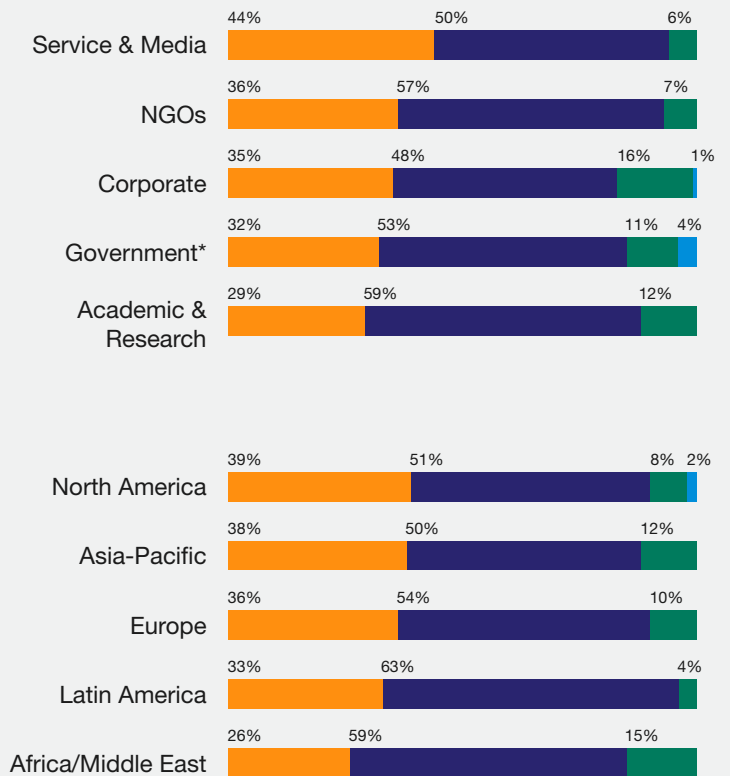
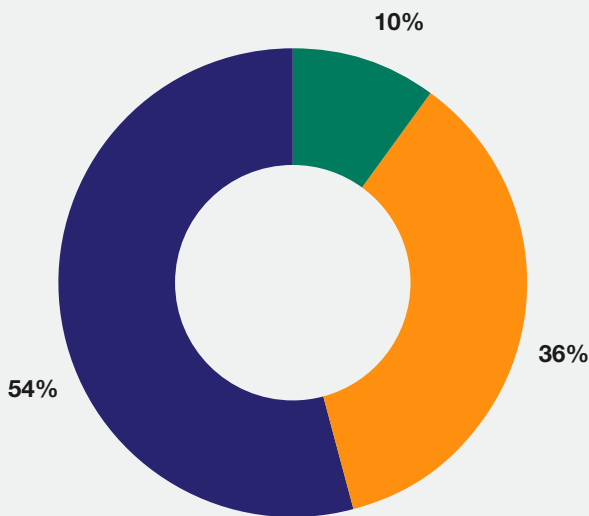


COVID-19 and its Impacts are Expected to Slow Progress on the SDGs

Most experts believe that the pandemic and its economic impacts will slow progress toward achieving the Goals, although a third say it will accelerate advancement. Experts in the Service and Media sector are more optimistic about the impact of the pandemic, whereas experts in the Academic and Research and NGO sectors, and those based in Latin America and in Africa and the Middle East, are the most prone to think the pandemic will slow progress.



How will the COVID-19 pandemic and its economic impacts affect society's progress toward achieving the Sustainable Development Goals (SDGs) over the coming decade?



All Respondents, 2021

- Accelerate progress
- Slow progress
- No change

*Small sample size (n=19)

- Accelerate progress
- Slow progress
- No change
- Don't know



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