

The 2021 Climate Survey

# Responding to Humanity's Code Red

October 2021



# Agenda

- Interactive Poll
- Overview of 2021 Climate Survey
- Panel Discussion



**Chris Coulter**  
CEO, GlobeScan



**Sabine Hoefnagel**  
Global Director of Services,  
Brand & Communications  
at ERM

*Please post questions, including your name and your organization, in the Q&A section any time*

**REMINDER:** *Please tag us using @SustInsti and @GlobeScan on Twitter and at The SustainAbility Institute by ERM and GlobeScan on LinkedIn, and/or use the hashtag #GSSClimate2021 when posting*

# Panellists



David Eichberg,  
Global Head of  
Climate Action at HP



Claire O'Neill,  
Managing Director,  
Climate &  
Energy, WBCSD



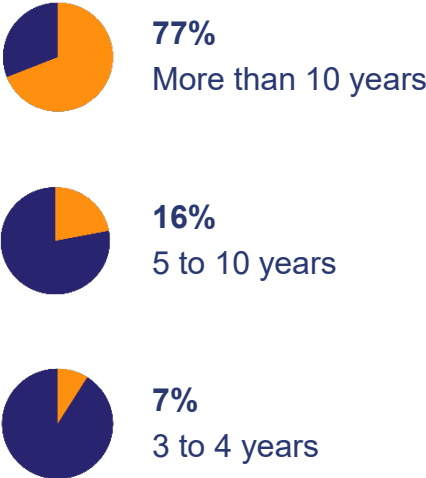
Rasmus Skov  
Senior Director,  
Global Public Affairs  
& Sustainability  
Solutions, Ørsted

# 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.

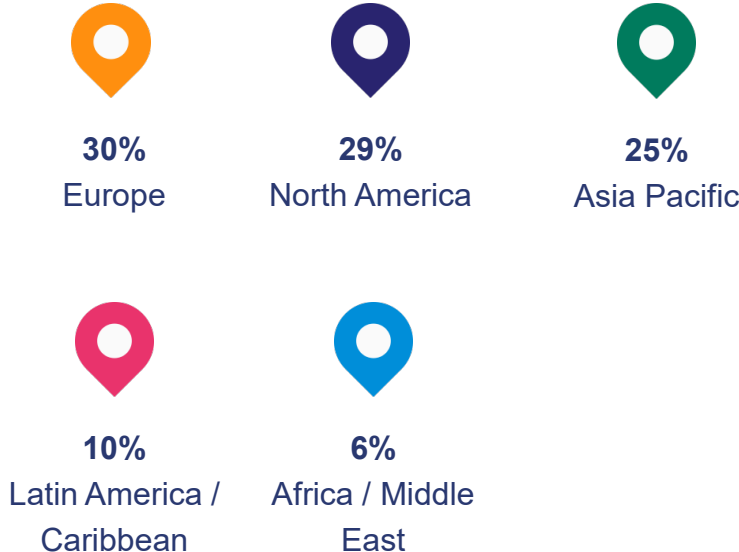
## Experience

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



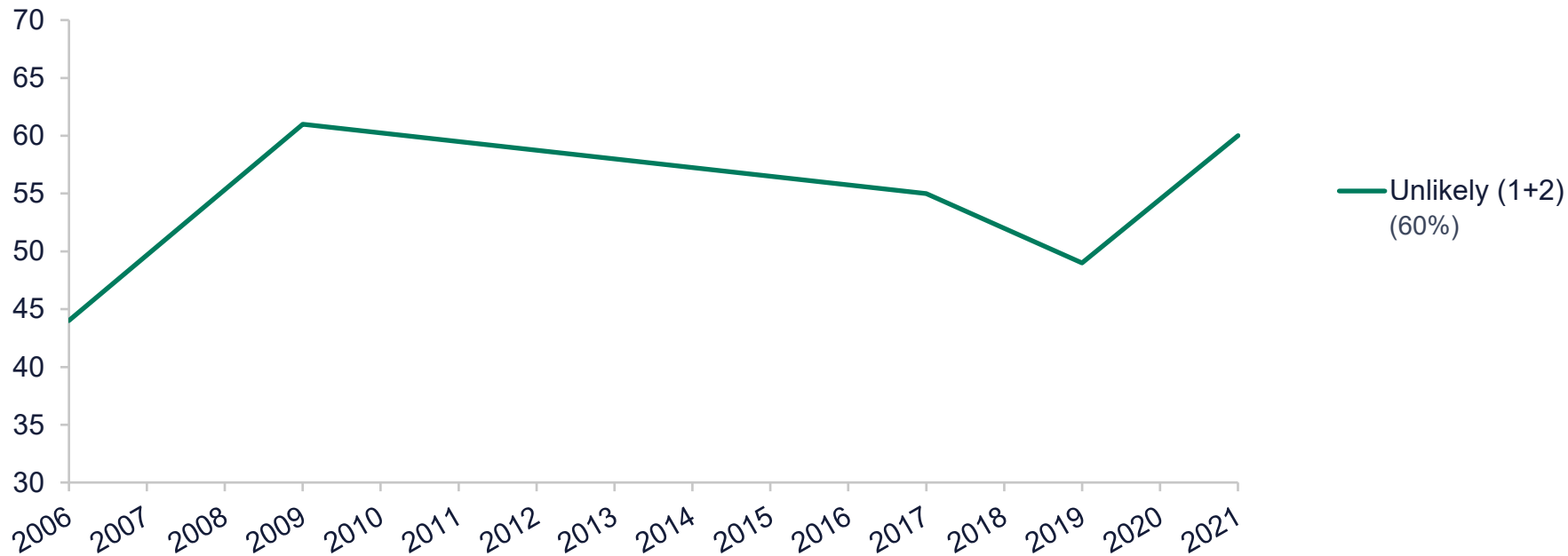
# Pessimism on Climate Progress is Increasing

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

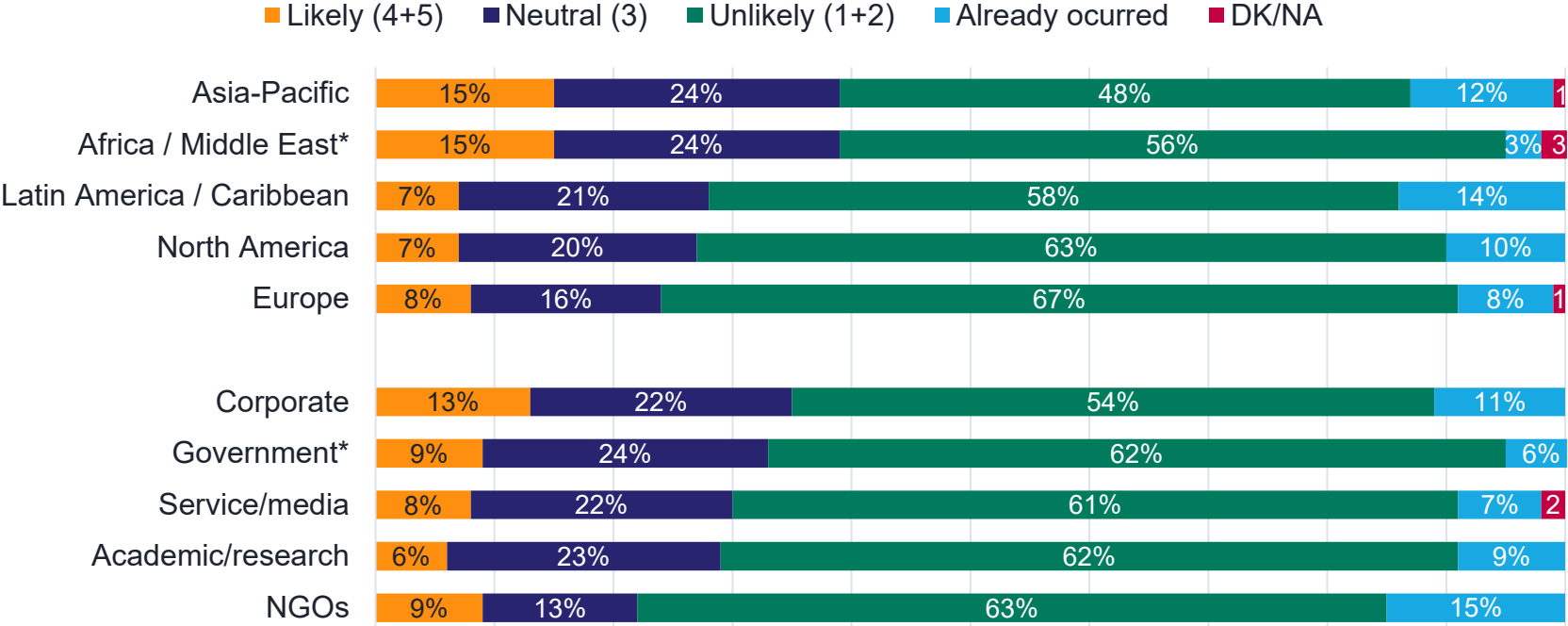
European and North American respondents, respondents in Latin America / Caribbean, and experts working on NGOs are more prone to say it is unlikely that we can avert major damage or that damage has already occurred.



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."*

\*Small sample size



% of Experts, by Sector and Region, 2021

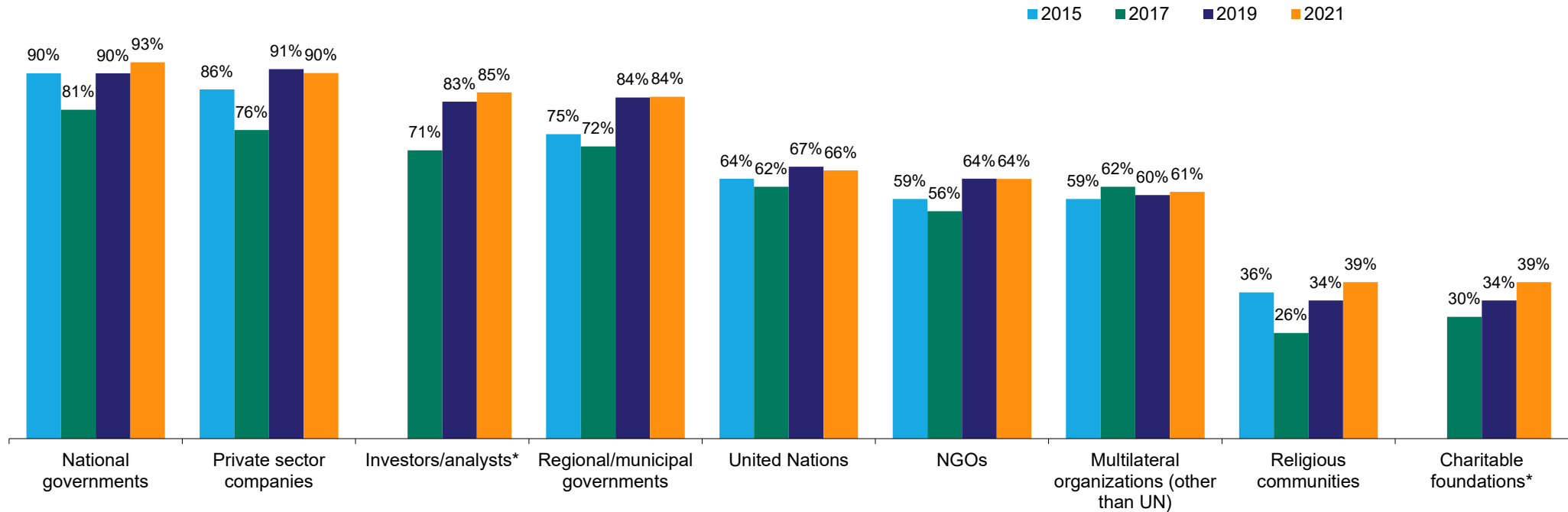
# Government, Business and Investors Most Critical for Paris Progress

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.



Question

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”).*



\*Not asked in 2015

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



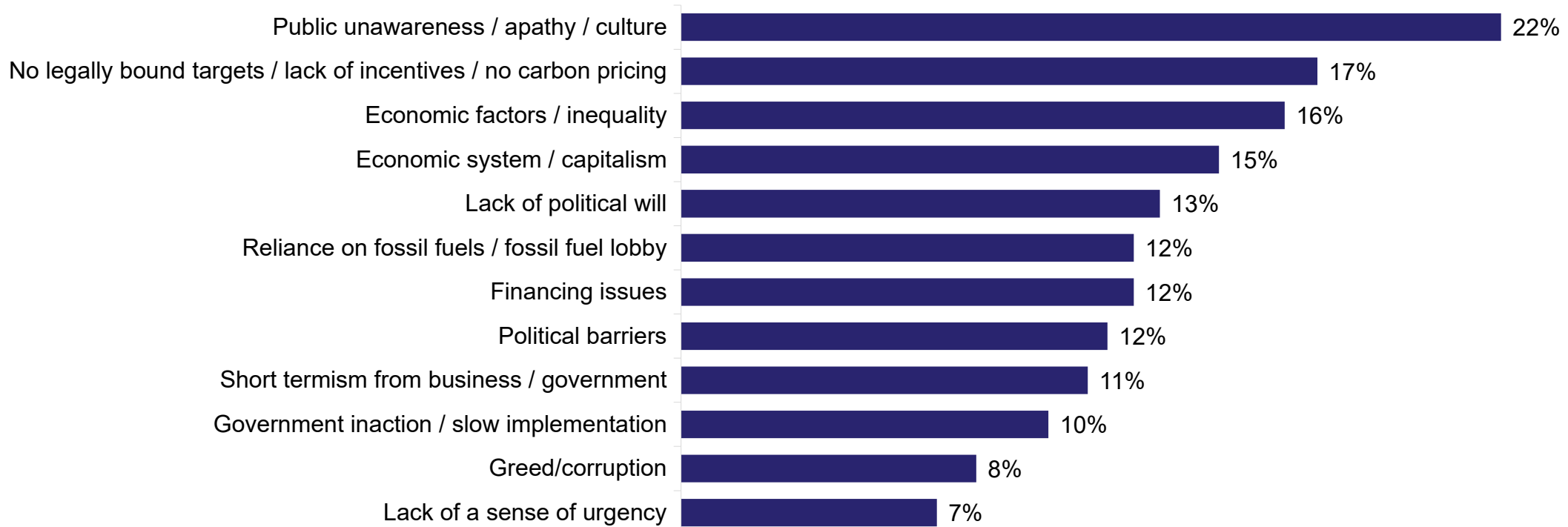
# Lack of Public Engagement Perceived as Key Barrier to Paris Goals

Public unawareness 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



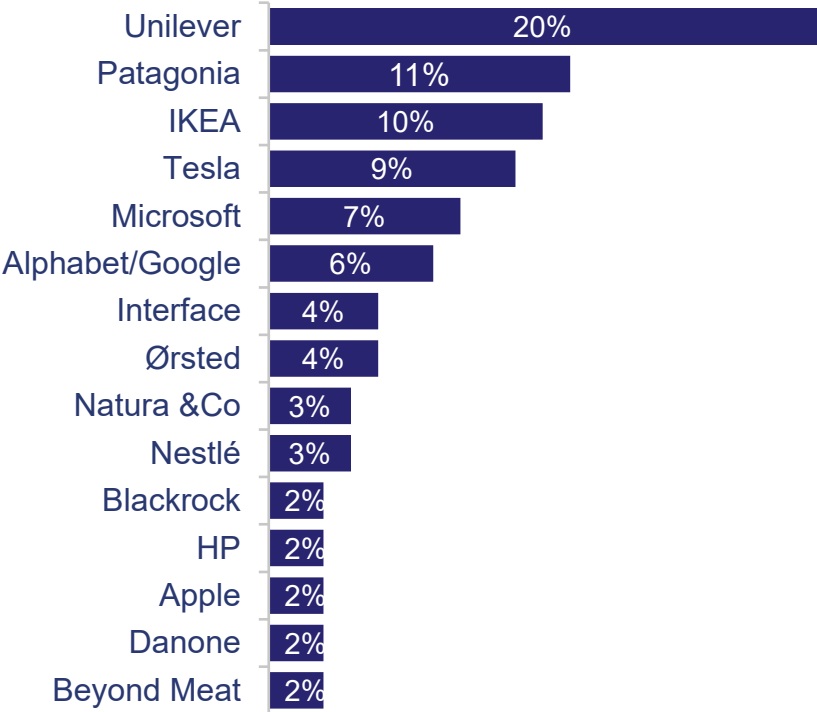
# Companies in Range of Industries Named as Climate Leaders

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

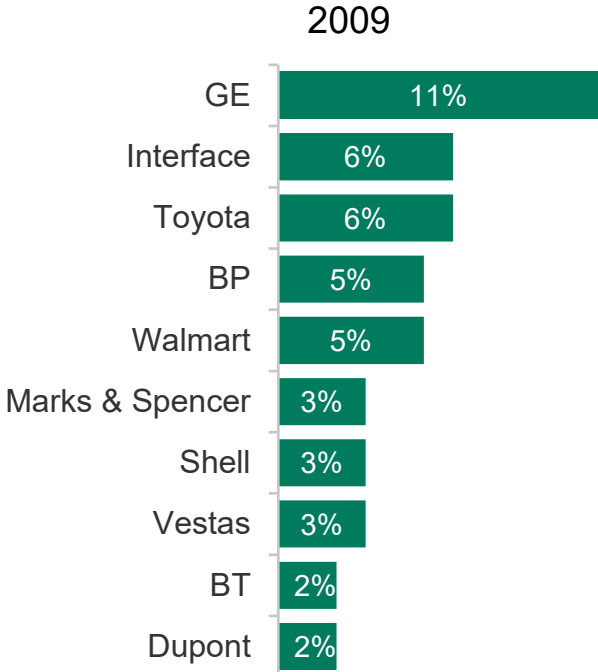
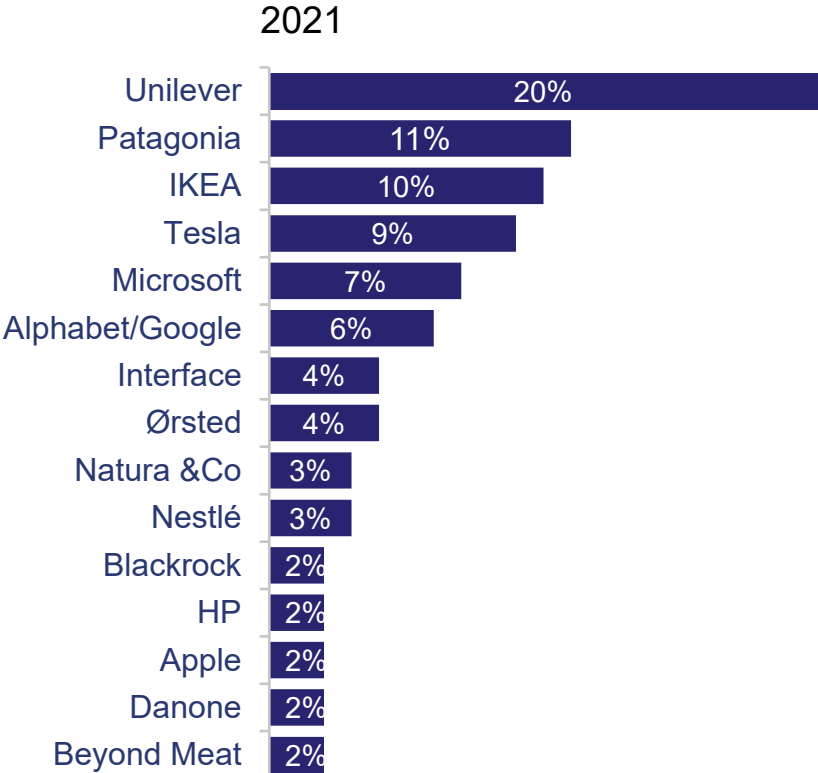
# Companies in Range of Industries Named as Climate Leaders

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, 2009–2021

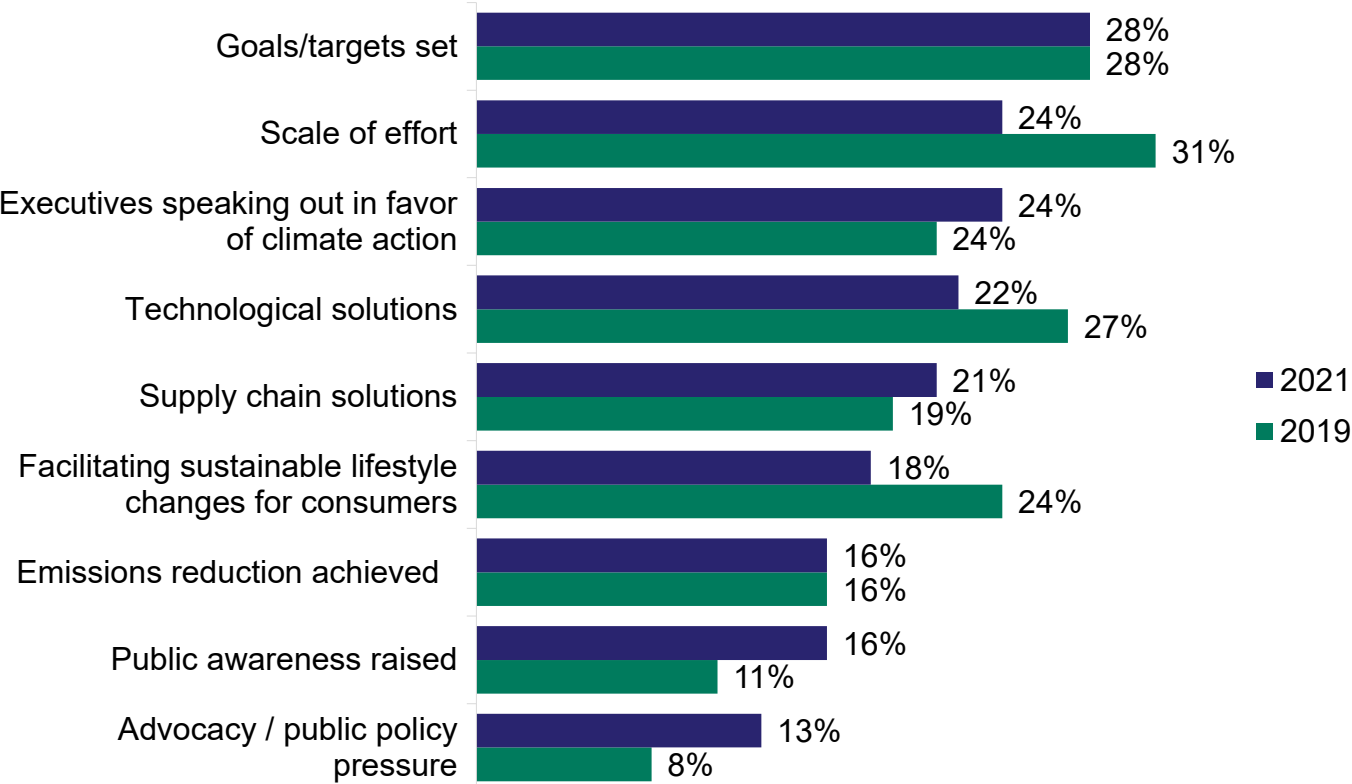
# Corporate Climate Leaders Recognized for their Goals and Targets

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.



Question

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

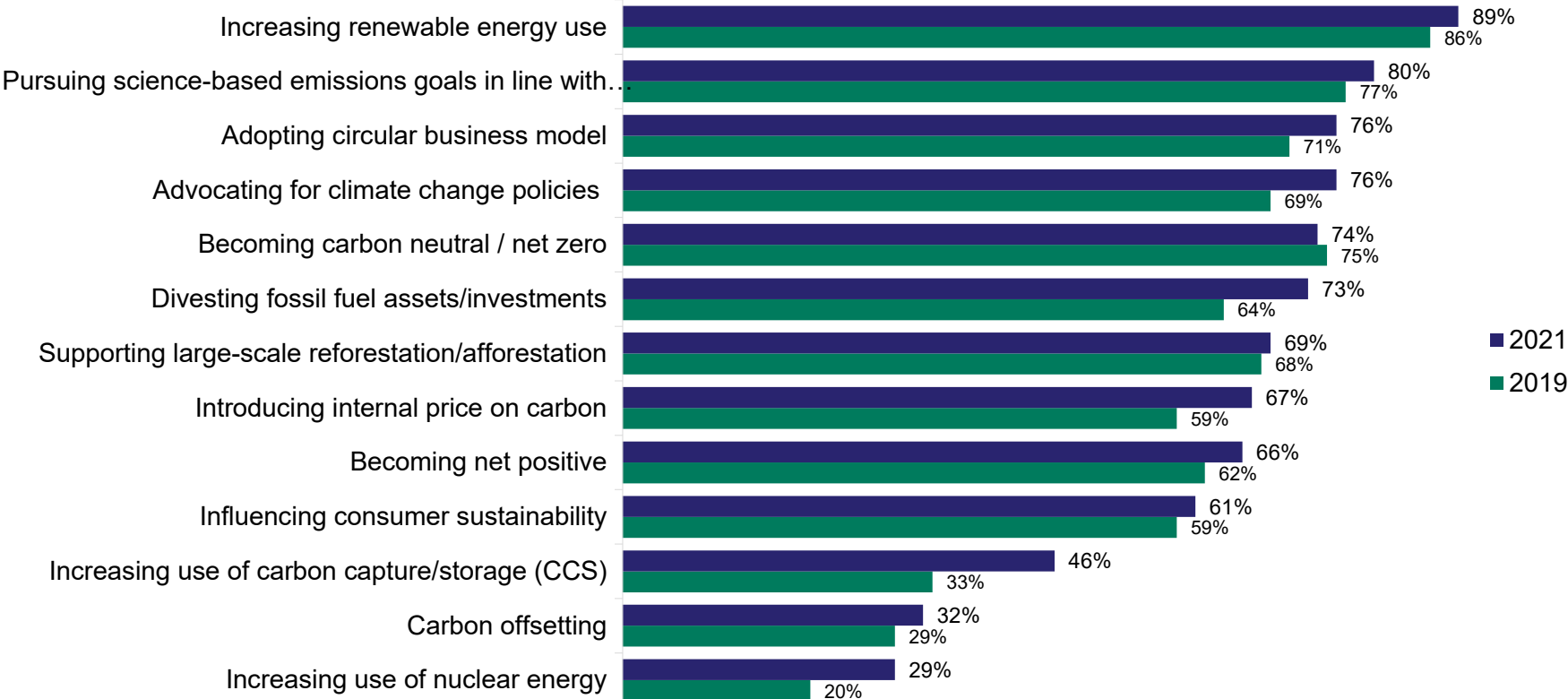
# Renewable Energy Use Seen as Most Effective Corporate Strategy for Climate Solutions

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.



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.”*



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

# Reaching Net Zero



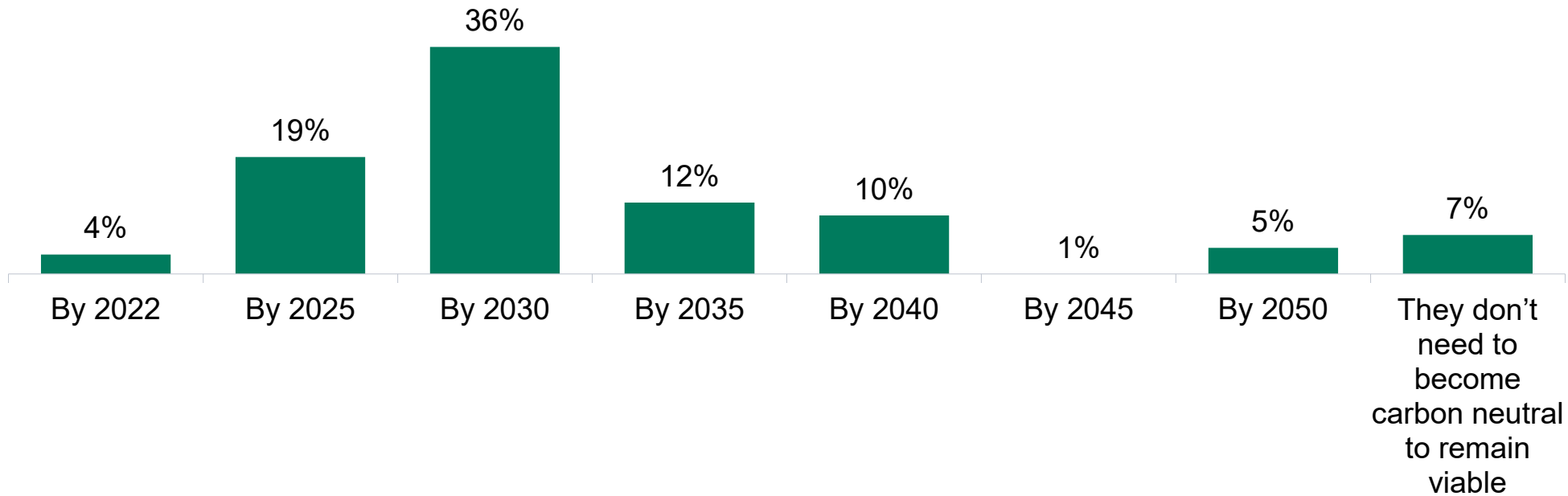
# Most Say 2030 or Sooner is the Deadline for Carbon Neutrality for Companies

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.*



% of Experts, 2021



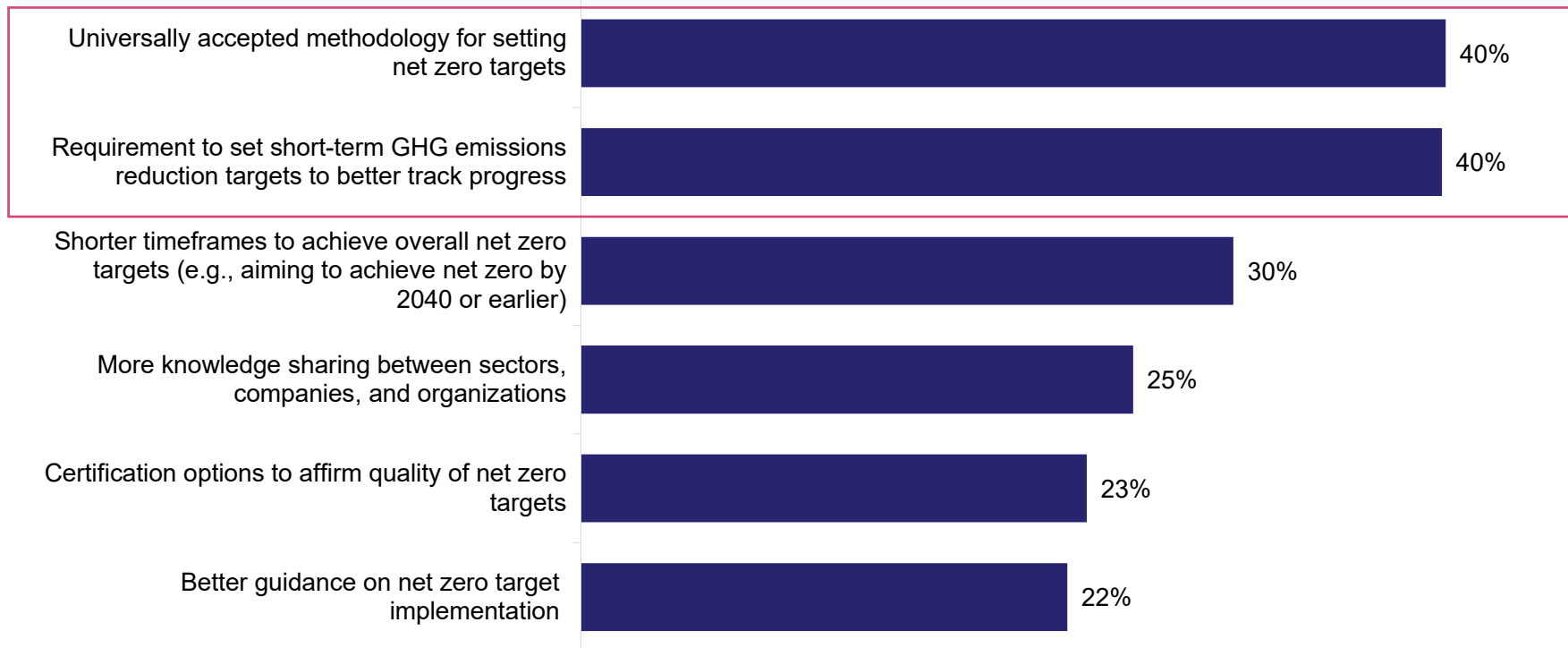
# Universal Methodology and Short-term Targets Would Make Net Zero Commitments More Effective

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



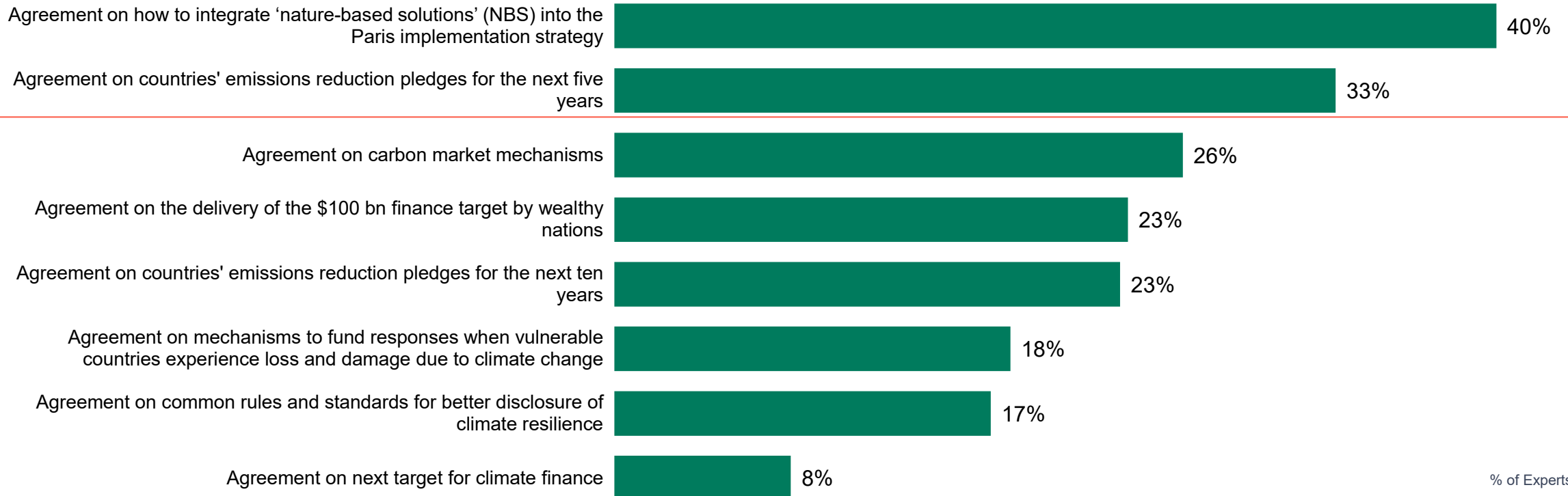
# Agreement on Nature-based Solutions Seen as Most Important COP26 Outcome

Experts most want to see agreement on how to implement nature-based solutions, 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.*



% of Experts, 2021

# Panel Discussion and Audience Q&A



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