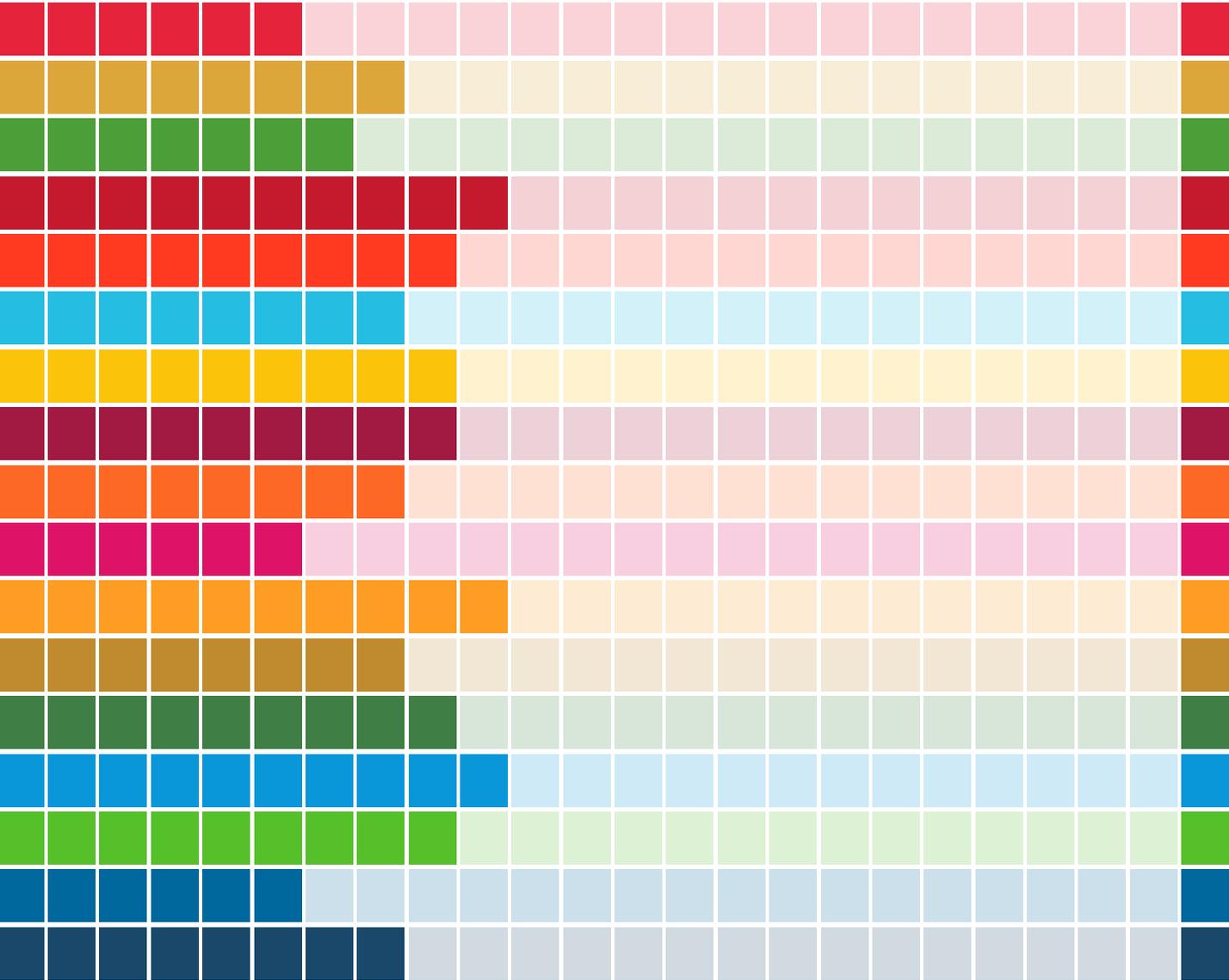


# EVALUATING PROGRESS TOWARDS THE **SUSTAINABLE DEVELOPMENT GOALS**



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# INTRODUCTION

Three decades following the publication of the Brundtland Commission's *Our Common Future*, sustainability practitioners remain alarmed about the lack of progress the international community has made on sustainable development.

While this is hardly surprising, the time is right to ask where specifically we are failing, who is accountable, and where the key opportunities are.

For this iteration of The GlobeScan / SustainAbility Survey (GSS), we chose to focus on the progress made on the Sustainable Development Goals (SDGs or the Global Goals). These goals were agreed by the United Nations member states together with civil society and business in 2015, and set forth the agenda until 2030. These goals are new, and progress was expected to be limited.

We asked more than 500 experienced sustainability professionals to evaluate the progress that has been made on each Global Goal, rank their relative urgency and also share insights into the priorities within their own organizations. We also wanted to know how companies specifically are responding to the SDGs and where they see opportunities for the greatest impact.

Polled experts unanimously agree that, so far, society's progress on sustainable development more broadly and the SDGs specifically has been poor. *Reduced Inequalities*, *Life Below Water*, *Life on Land* and *No Poverty* were singled out by respondents as the areas where society's level of achievement has been lagging the most.

Not surprisingly, experts also think that *Reduced Inequalities*, along with *Climate Action*, *Quality Education*, *Responsible Consumption and Production*, and *Peace, Justice, and Strong Institutions*, are the areas most vital to overall progress on sustainable development. Non-governmental organizations, social entrepreneurs and the United Nations are seen as doing the most to advance the goals, in contrast to national governments and the private sector.

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**“We asked more than 500 experienced sustainability professionals to evaluate the progress that has been made on each Global Goal.”**

But our research is also showing growing momentum and signs of coalescence around the SDGs. The Global Goals have given businesses a lens through which to focus their sustainability efforts, and as responses from our corporate experts show, companies are beginning to see material opportunities in the SDGs (e.g., with product and service innovation leading the list of related actions), rather than feeling like they need to respond to the SDGs solely due to internal and external pressures or competitive dynamics.

Overall, the survey findings underline the complexity of sustainable development problems faced by the global community and the urgent need for new forms of leadership enabled by new systems and business models. While we're still in the early days of the journey toward achieving the SDGs, the spirit of the SDGs is nothing new, and the global community's thirty-year velocity toward what they seek to achieve has been slow. It is time for a step change before 2030 comes and goes.



# SURVEY METHODOLOGY

511 qualified sustainability experts completed the online questionnaire from November 22, 2016 to January 9, 2017.

## EXPERIENCE

Respondents have the following experience working on sustainability issues\*:



## SECTORS

Respondents were drawn from the following sectors:



## GEOGRAPHY

Experts surveyed span 74 countries in the following regions:



\* Respondents with fewer than three years experience have been excluded from the results

# KEY FINDINGS

## EXPERTS CRITICAL OF PROGRESS

Most sustainability experts are critical about progress made to date in the transition to sustainable development. That said, experts' inclination to rate progress as poor has diminished since we first asked this question in 2005, showing a positive long-term trend.

Sustainability experts are also very critical about progress to date on all of the SDGs, with progress on *Reduced Inequalities* and *Life Below Water* seen as particularly poor.

Non-governmental organizations are perceived as having contributed the most to progress on the Global Goals. In contrast, national governments and the private sector are seen as having contributed very little.

*Climate Action* is considered by four in ten experts as the most important Global Goal for society to focus on in order to achieve the most progress on sustainable development.

Experts are also most likely to mention *Climate Action* when asked which of the SDGs receive the most attention inside their own organizations.

Corporate respondents most often say their organization is responding to the SDGs by developing products or services that will provide solutions in line with the Global Goals. Experts primarily see support for the goals as an opportunity to align core business activities or innovation efforts with broader societal needs. Fewer than one in ten corporate respondents report that their companies are not currently contributing or planning to contribute to the SDGs.

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**“Climate Action is considered by four in ten experts as the most important Global Goal for society to focus on.”**

# SECTION ONE

## **GAUGING SOCIETY'S PROGRESS ON SUSTAINABLE DEVELOPMENT AND THE SUSTAINABLE DEVELOPMENT GOALS**

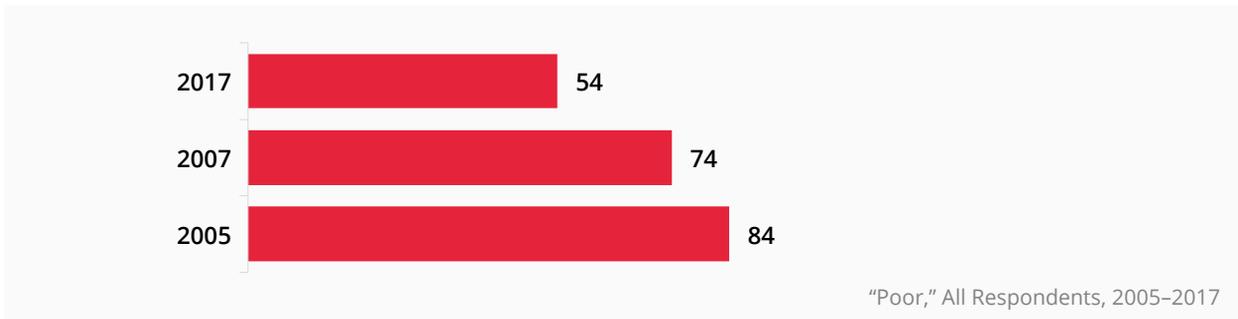
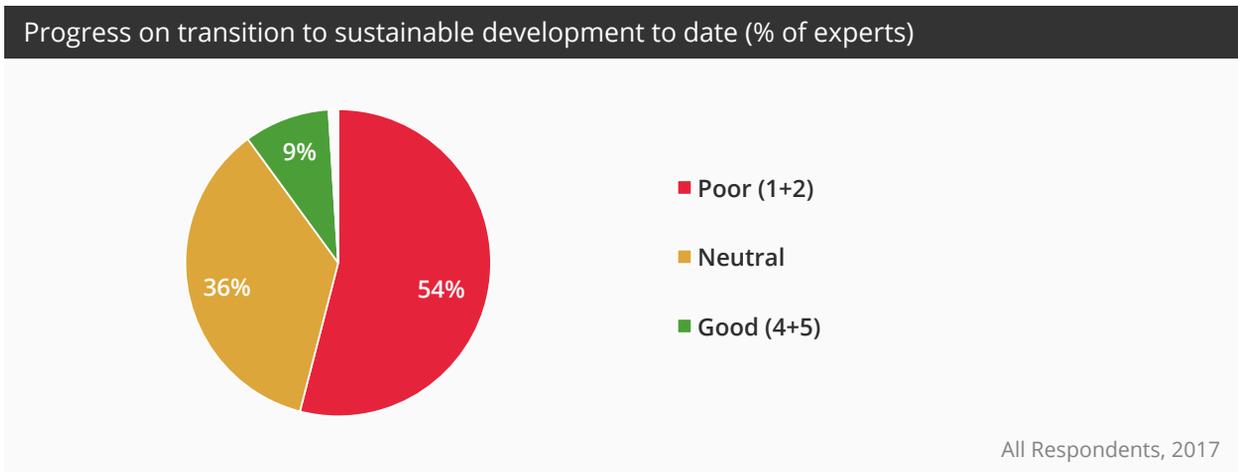


# OVERALL PROGRESS

## HOW DO EXPERTS RATE PROGRESS ON THE TRANSITION TO SUSTAINABLE DEVELOPMENT

Only a very small proportion of surveyed professionals (9%) feel positive about the level of progress made to date in the transition to sustainable development, suggesting a tremendous amount of work remains to be done in this area.

However, sustainability experts have become less critical about progress made globally since we first asked this question in 2005, revealing a positive long-term trend.



### 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 "poor" and 5 is "excellent").*

In 2005 and 2007 question was asked: "How would you rate the progress made to date in the transition to sustainable development at the following levels? 1) Globally"

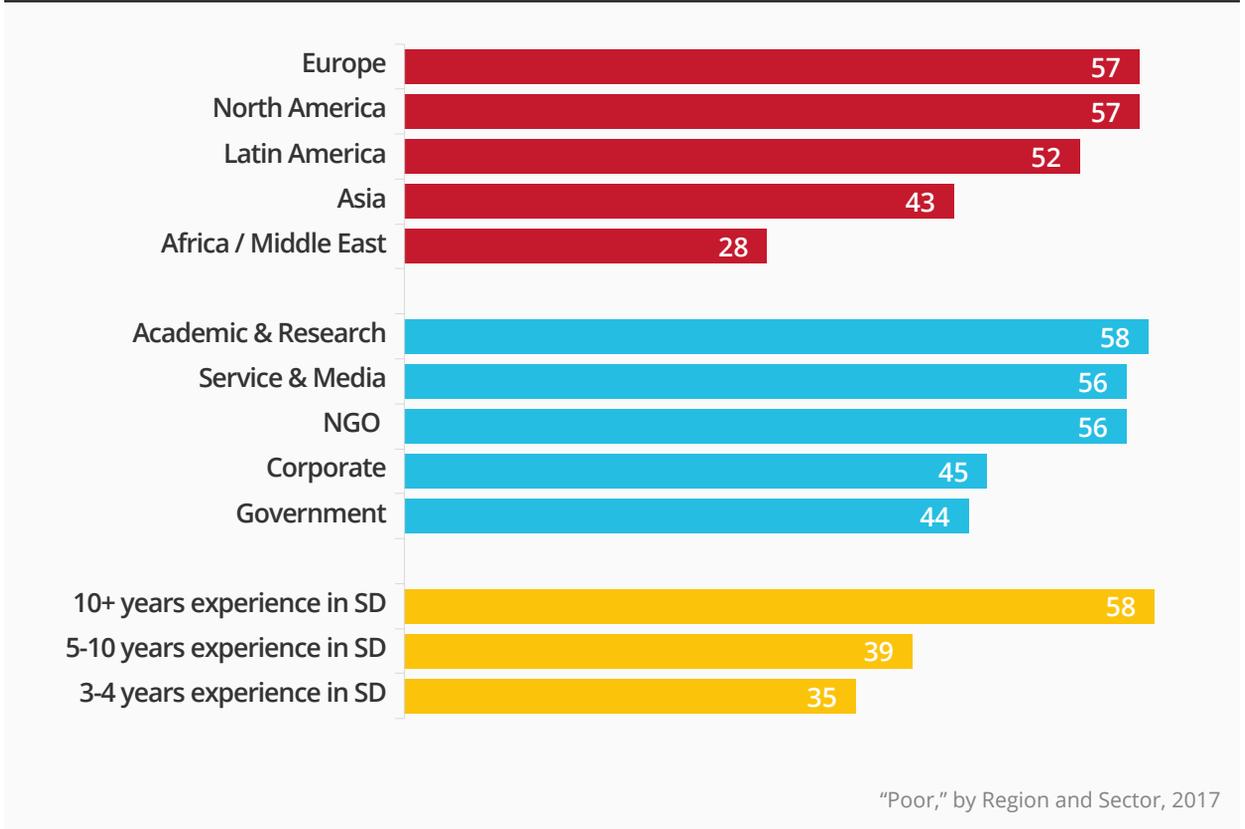
# POSITIVE / NEGATIVE?

## EXPERTS IN AFRICA, ASIA ARE THE MOST POSITIVE ABOUT ACHIEVEMENTS TO DATE

Sustainability experts based in Africa, the Middle East and Asia are more positive about progress achieved on the SDGs than their colleagues in Europe and North America, while respondents in the corporate and government sectors are less pessimistic about achievements to date than their peers in academia and NGOs.

It is notable that experts who have spent more than ten years working in the area of sustainable development are significantly more critical than those with less experience.

“Poor” progress on transition to sustainable development to date (% of experts)



### Question:

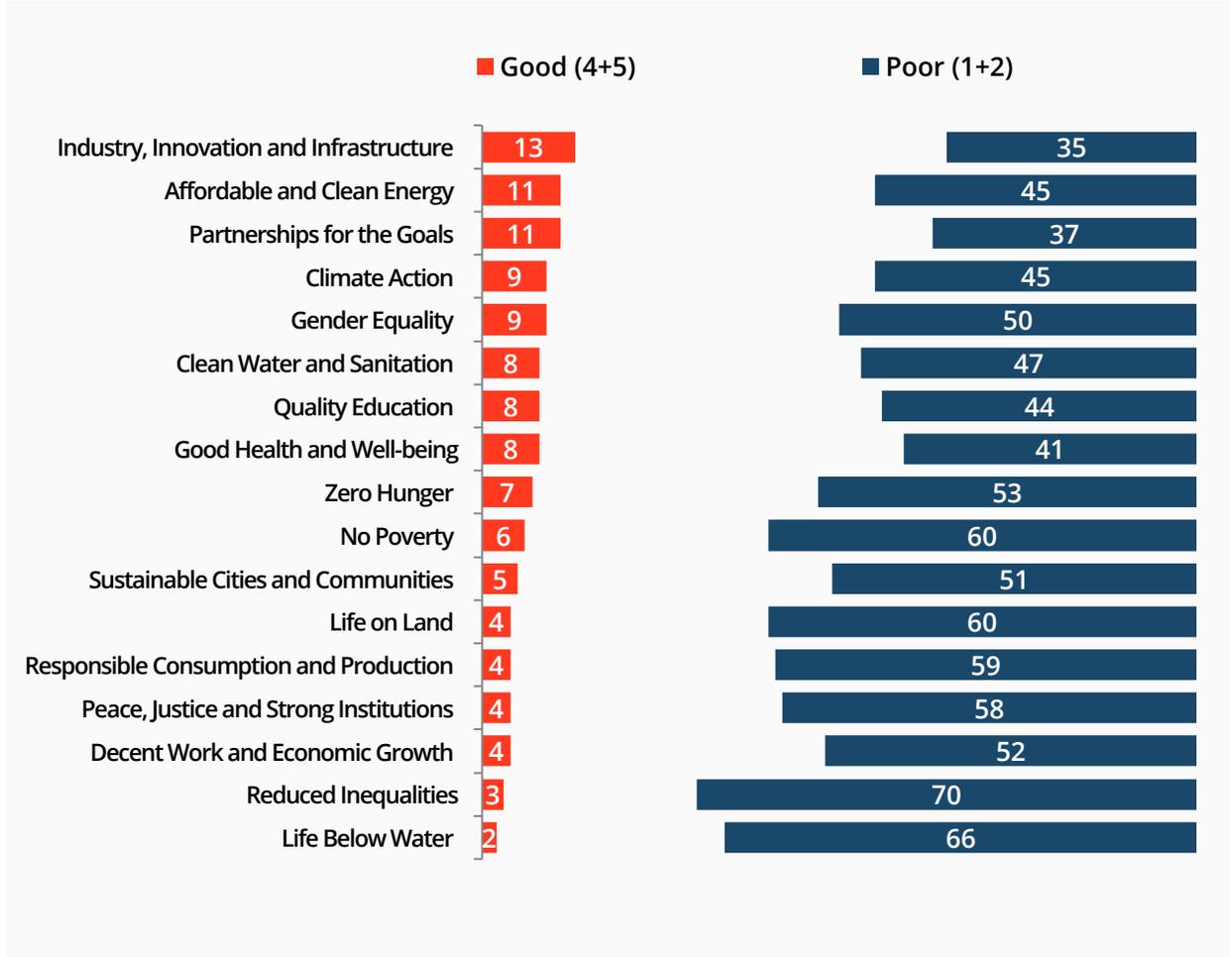
How would you rate the progress made to date in the transition to sustainable development globally? Please use the 5-point scale provided (where 1 is “very poor” and 5 is “excellent”).

# ACHIEVEMENTS

## SOCIETY'S ACHIEVEMENTS ON GLOBAL GOALS HAVE BEEN LIMITED

When rating society's performance toward each of the Global Goals, experts agree that progress has been particularly poor in the areas of *Reduced Inequalities*, *Life Below Water*, *Life on Land* and *No Poverty*. Respondents are more positive about progress made in the areas of *Industry, Innovation and Infrastructure* and *Partnerships for the Goals*.

"Progress on the SDGs (% of experts)



### 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").

# RANKING PROGRESS

## RANKING THE SDGS ON PROGRESS TO DATE

Experts agree that more progress is needed on all Global Goals, but their responses suggest that for some SDGs the need for greater progress is more urgent.

The chart below ranks the Global Goals from those where most progress has been made (with the smallest difference between the number of experts rating the society's performance as poor and those saying that performance is good) to those where the gap remains the widest.



**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").*

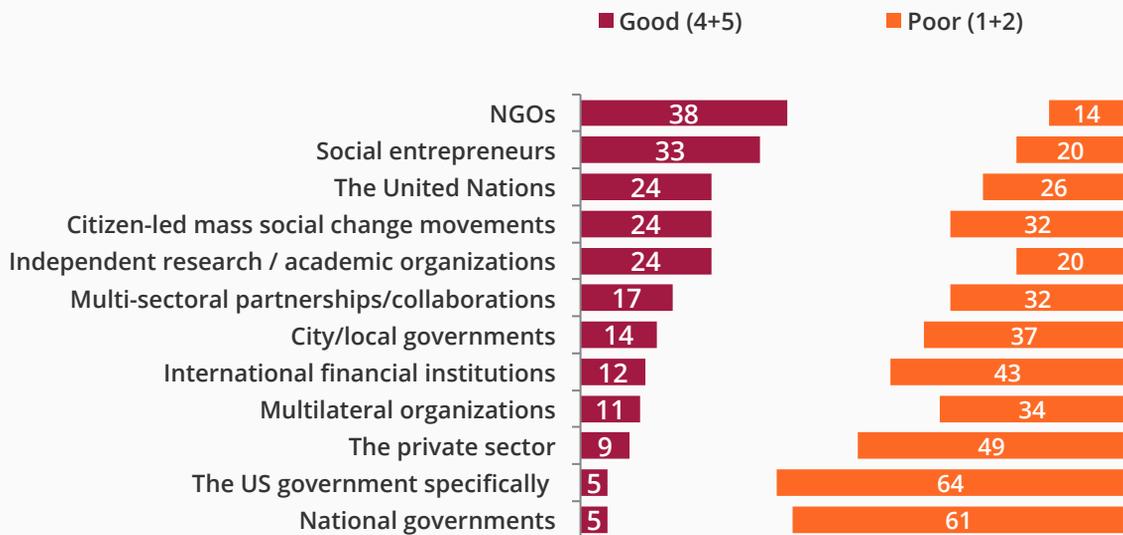
# WHO IS DRIVING PROGRESS

## NGOS AND SOCIAL ENTREPRENEURS HAVE MADE THE BIGGEST CONTRIBUTION ON THE GLOBAL GOALS

Sustainability experts view NGOs as having contributed the most toward progress on the Global Goals to date, followed by social entrepreneurs, the UN, citizen-led mass social change movements and academics. In contrast, national governments and the private sector are perceived as having contributed very little.

A majority of experts view the performance of national governments, and specifically that of the U.S. government, as “poor” in terms of contribution to the SDGs, while almost half say the same about the private sector. There is plenty of room for companies to become more active -- and recognized -- in this space.

Contribution of organizations to progress on the SDGs (% of experts)



All Respondents, 2017

### Question:

How would you rate the performance of each of the following types of organizations in terms of its contribution to progress on the Sustainable Development Goals (SDGs)? Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

## SECTION TWO

# RELATIVE IMPORTANCE OF SDGS AND THE ATTENTION THEY RECEIVE WITHIN ORGANIZATIONS

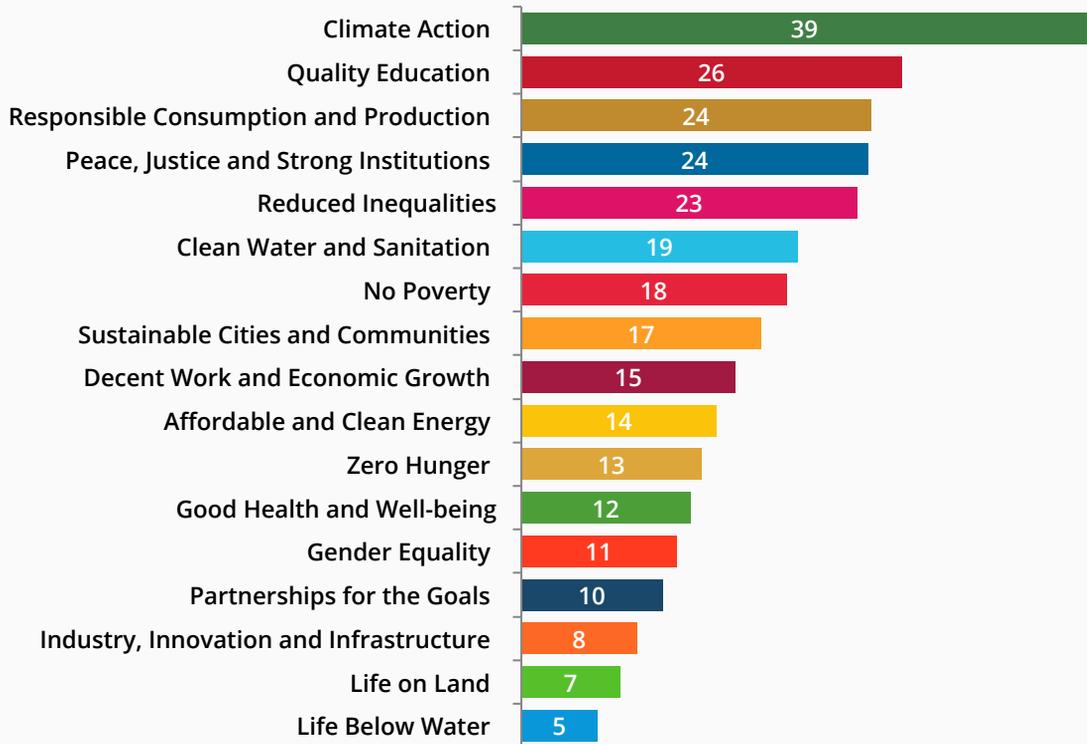


# IMPACT

## CLIMATE ACTION SEEN AS HAVING THE BIGGEST IMPACT ON OVERALL SUSTAINABLE DEVELOPMENT PROGRESS

*Climate Action* is seen by most experts as the most important SDG for society to focus on in order to achieve the most progress toward sustainable development. *Quality Education* and *Responsible Consumption and Production* are also seen as affecting progress on many other goals.

Most important SDG for society to focus on to achieve the most progress (% of experts)



Total Mentions (Ranked #1, 2, and 3), All Respondents, 2017

### Question:

Which of the Sustainable Development Goals (SDGs) do you think are the most important for society to focus on in order to achieve the most progress toward sustainable development? Please choose at most three goals in order of importance.

# REGIONAL RANKINGS

## REGIONAL RANKINGS ON SDG IMPORTANCE DIFFER

Experts across all sectors agree on the outstanding importance of *Climate Action* compared to the other Global Goals. However, African experts rank *Quality Education* as the most important SDG, while Latin American experts say *Reduced Inequalities* should be the top priority.

### Most important SDG for society to focus on to achieve the most progress (% of experts)

	Most Important Goal	2 <sup>nd</sup> Most Important Goal	3 <sup>rd</sup> Most Important Goal
Government*	38% Climate Action	34% Quality Education	28% Peace, Justice & Strong Institutions
NGO	34% Climate Action	26% Quality Education	26% Reduced Inequalities
Academic & Research	44% Climate Action	31% Peace, Justice & Strong Institutions	24% Reduced Inequalities + Responsible Consumption
Corporate	38% Climate Action	31% Quality Education	24% Reduced Inequalities
Service & Media	41% Climate Action	26% Quality Education	25% Responsible Consumption
Asia	31% Climate Action	25% Quality Education	25% Responsible Consumption
Africa / Middle East*	44% Quality Education	31% Peace, Justice & Strong Institutions	28% Zero Hunger
Europe	39% Climate Action	29% Quality Education	28% Responsible Consumption & Production
North America	46% Climate Action	28% Clean Water & Sanitation	23% Quality Education + Responsible Consumption
Latin America	40% Reduced Inequalities	33% Climate Action	31% Peace, Justice & Strong Institutions

\* Small sample size

Total Mentions (Ranked #1, 2, and 3), by Sector and Region, 2017

### Question:

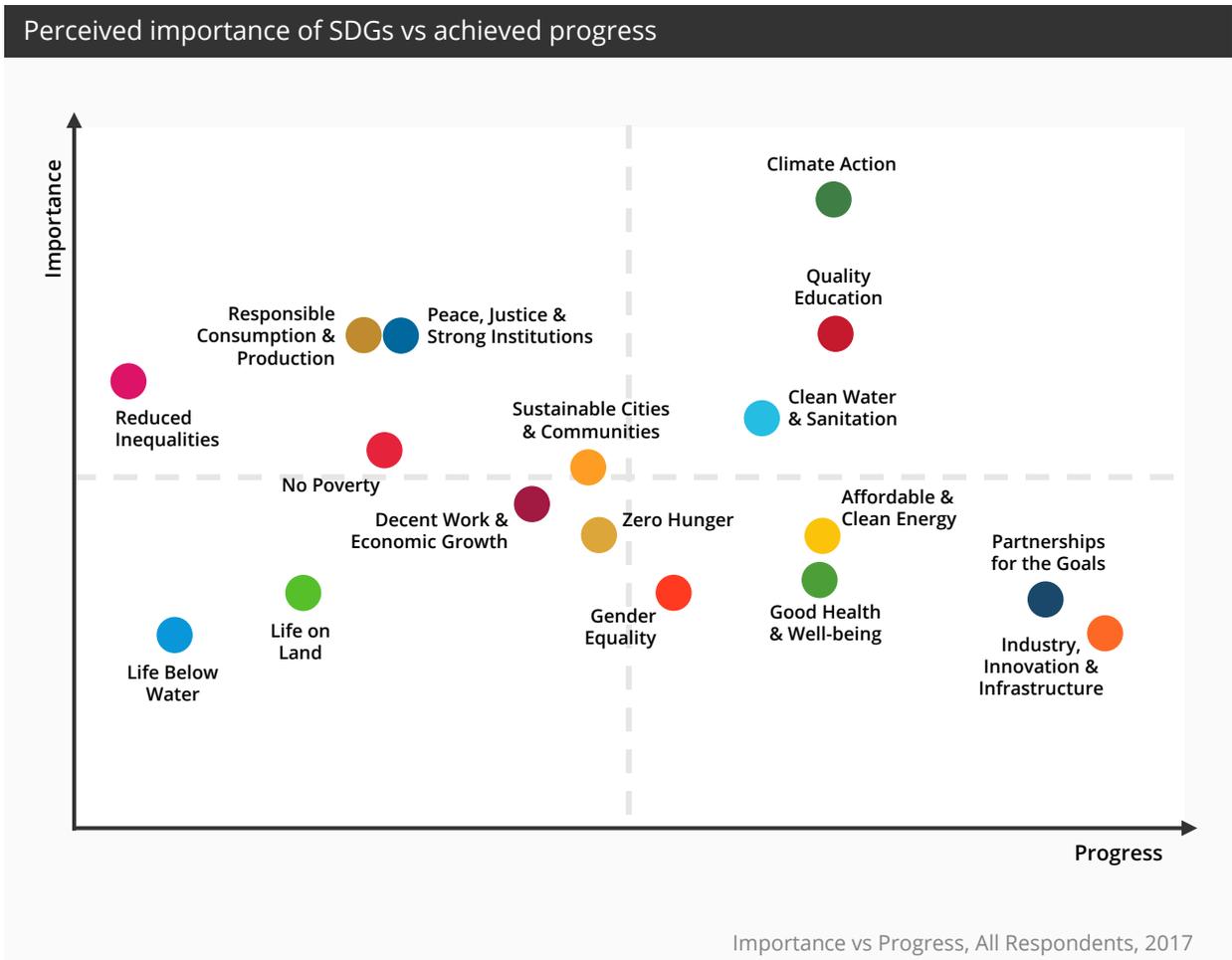
Which of the Sustainable Development Goals (SDGs) do you think are the most important for society to focus on in order to achieve the most progress toward sustainable development? Please choose at most three goals in order of importance.

# IMPORTANCE VS PROGRESS

## GAUGING THE PERCEPTION OF SDG

### IMPORTANCE VS ACHIEVED PROGRESS

This matrix shows the relative perceived importance of each Global Goal compared to the progress that experts perceive society has made so far. The results suggest relative underperformance on *Reduced Inequalities*, *Responsible Consumption and Production*, *No Poverty* and *Peace, Justice and Strong Institutions*, all goals seen by experts as particularly important in driving overall progress on sustainable development.



### Questions:

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").

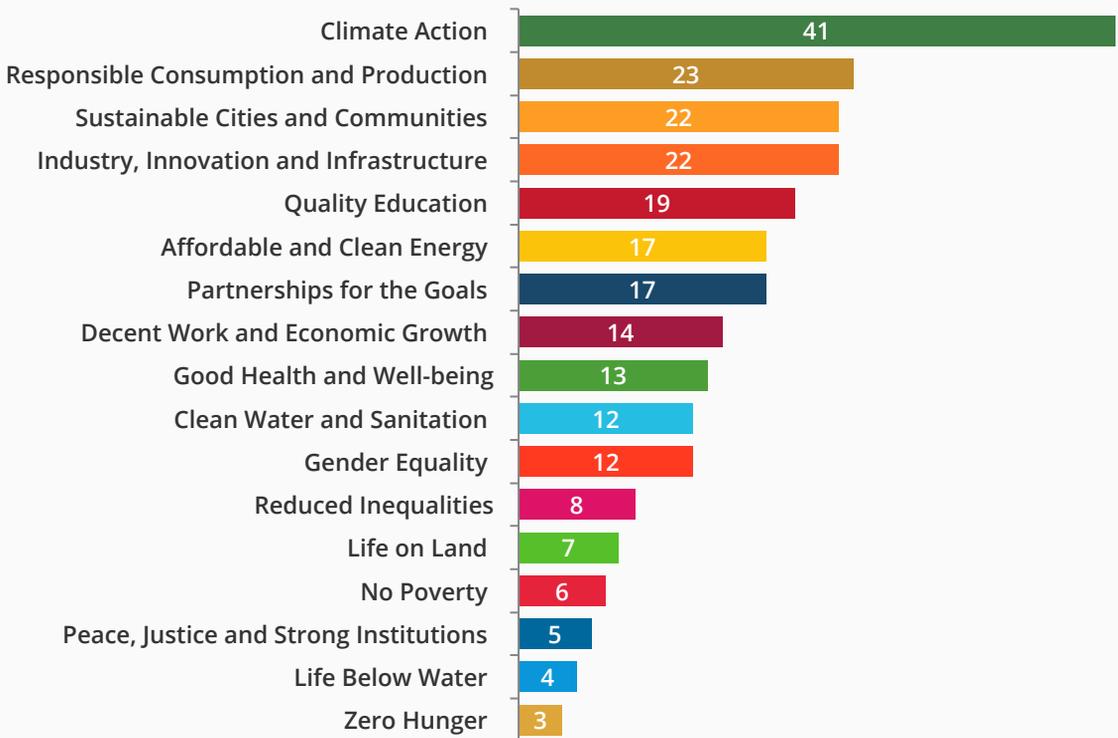
Which of the Sustainable Development Goals (SDGs) do you think are the most important for society to focus on in order to achieve the most progress toward sustainable development? Please choose at most three goals in order of importance.

# PRIORITIES

## CLIMATE ACTION RECEIVING MOST ATTENTION INSIDE ORGANIZATIONS

When asked which SDGs receive the most attention in their own organizations, experts mention *Climate Action* more than any of the other Global Goals. *Responsible Consumption and Production*, *Sustainable Cities and Communities* and *Industry, Innovation and Infrastructure* also receive relatively high levels of attention.

SDG receiving the most attention within own organization (% of experts)



Total Mentions, All Respondents, 2017

### Question:

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.

# REGIONAL FOCUS

## ASIA AND AFRICA DIFFER IN SDG FOCUS

Although experts in all sectors and most regions prioritize *Climate Action* in their own organization or work, Asian experts focus more on *Sustainable Cities and Communities* while experts in Africa and the Middle East prioritize *Quality Education*. Secondary priorities also vary greatly between sectors and regions.

### SDG receiving the most attention within own organization

	Goal Receiving Most Attention	Goal Receiving 2 <sup>nd</sup> Most Attention	Goal Receiving 3 <sup>rd</sup> Most Attention
Government*	47% Climate Action	34% Industry & Infrastructure	28% Cities & Communities
NGO	30% Climate Action	26% Cities & Communities	24% Partnerships
Academic & Research	37% Climate Action	32% Quality Education	27% Cities & Communities
Corporate	54% Climate Action	30% Industry & Infrastructure	26% Energy
Service & Media	42% Climate Action	34% Consumption	30% Industry & Infrastructure
Asia	31% Cities & Communities	28% Climate Action	25% Consumption
Africa / Middle East*	28% Quality Education	25% Climate Action	25% Cities & Communities
Europe	45% Climate Action	27% Consumption	22% Industry & Infrastructure
North America	47% Climate Action	25% Industry & Infrastructure	22% Cities & Communities
Latin America	40% Climate Action	21% Reduced Inequalities	19% Industry + Education + Communities

\* Small sample size

By Sector and Region, Total Mentions, 2017

### Question:

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.

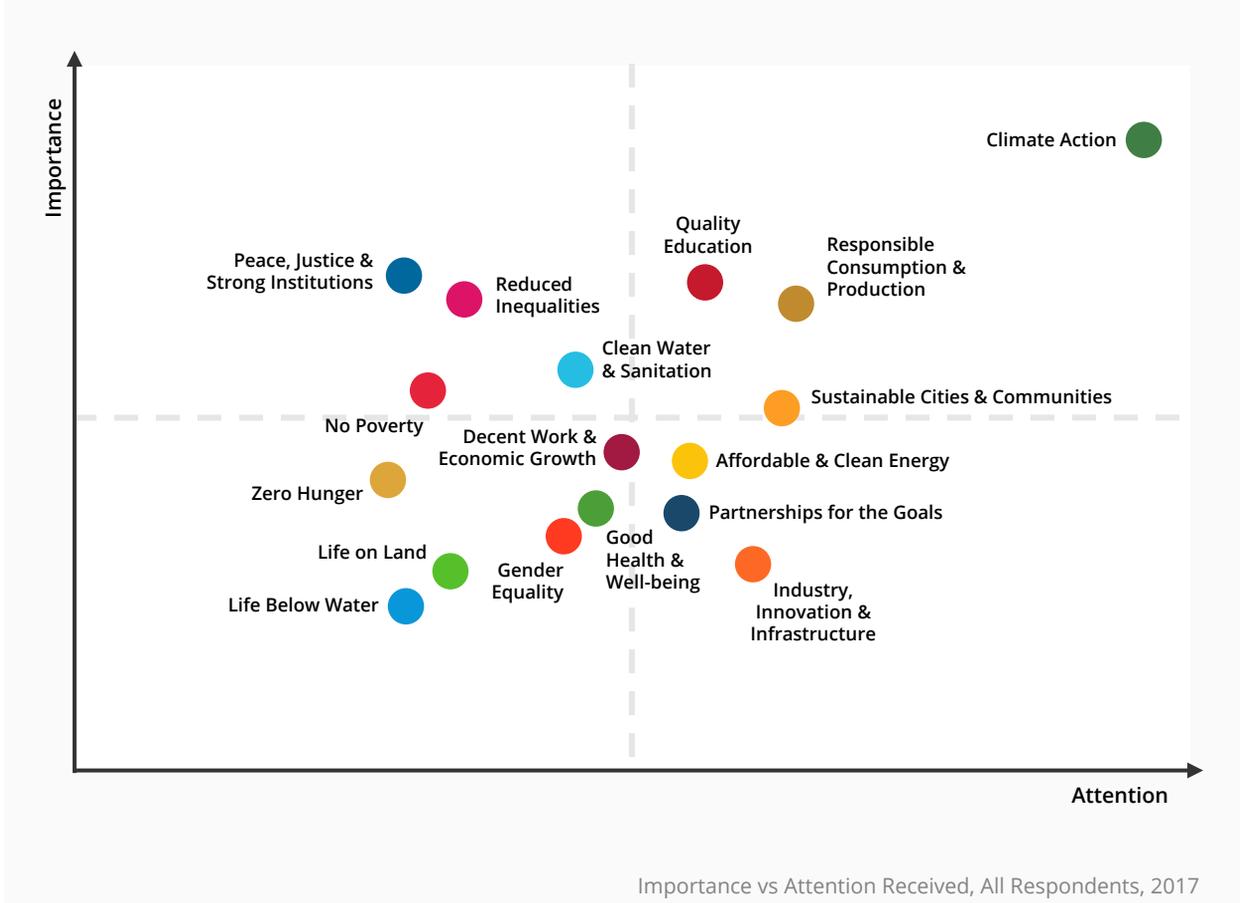
# URGENCY VS ATTENTION

## GAUGING THE PERCEPTION OF SDG

### URGENCY VS ATTENTION RECEIVED

Results here suggest that (compared to other goals) *Peace, Justice and Strong Institutions, Reduced Inequalities, No Poverty and Clean Water and Sanitation* receive relatively low levels of attention, even though these Goals are particularly important in driving overall SD. In contrast, *Climate Action, Responsible Consumption and Production, Sustainable Cities and Communities* and *Quality Education* receive more relative attention.

Importance of SDG vs attention received



### Questions:

Which of the Sustainable Development Goals (SDGs) do you think are the most important for society to focus on in order to achieve the most progress toward sustainable development? *Please choose at most three goals in order of importance.*

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.*

# SECTION THREE

## **CORPORATE ACTION ON THE SDGS**



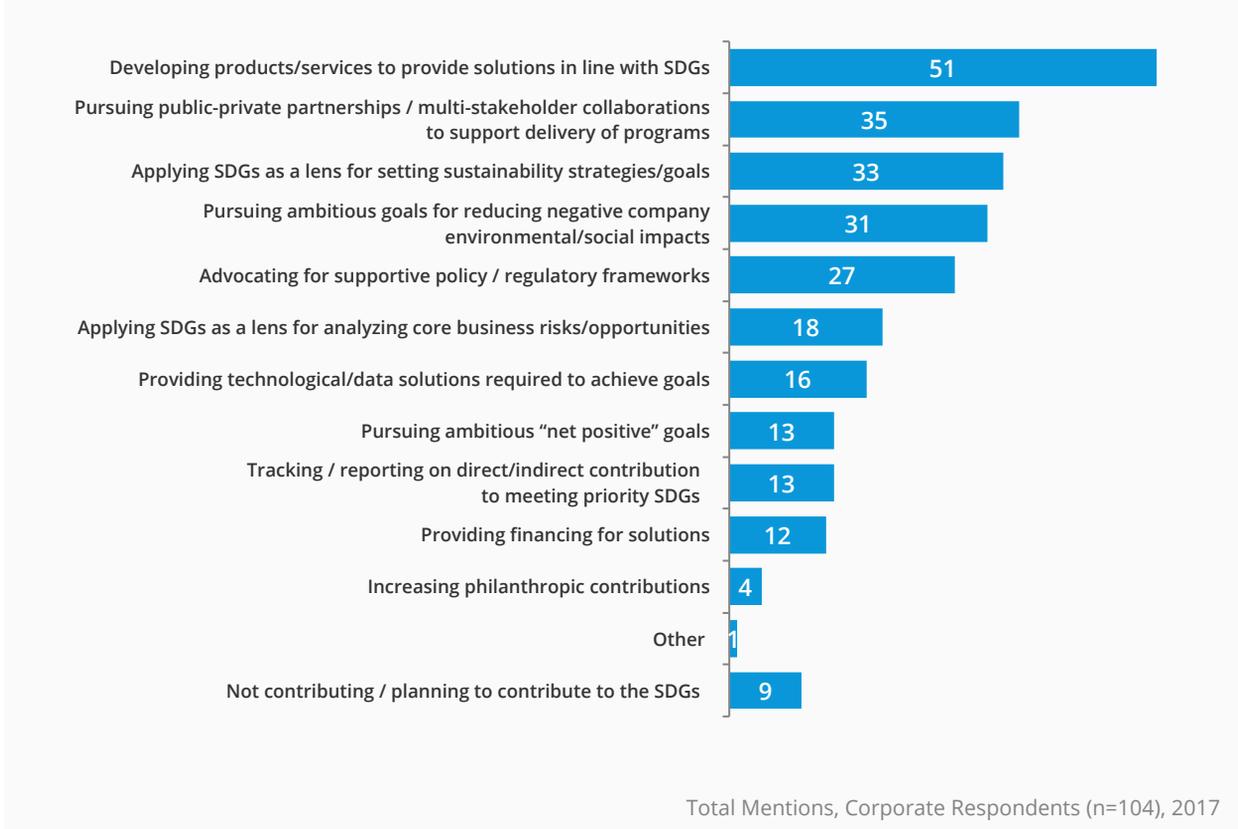
# PRODUCTS & PARTNERSHIPS

## COMPANIES ACT ON SDGS BY DEVELOPING PRODUCTS & PURSUING NEW PARTNERSHIPS

More than half of corporate experts surveyed say that their organizations contribute to the SDGs by developing products or services that will provide solutions in line with the Global Goals. Many corporate experts also say their organizations pursue partnerships or collaborations related to the SDGs or apply the Global Goals as a lens when setting strategies and goals.

Very few corporate experts mention philanthropic contributions or providing financing as a way to contribute toward the SDGs, suggesting corporates may prefer to take a direct role in providing solutions.

How organization is contributing or planning to contribute toward SDGs (% of experts)



**Question:**

How, if at all, is your organization contributing or planning to contribute toward the Sustainable Development Goals (SDGs)? *Please choose the three most suited from the following list.*

# ALIGNING INTERESTS

## OPPORTUNITIES TO ALIGN BUSINESS AND SOCIETAL INTERESTS DRIVE PRIVATE SECTOR INTEREST IN SDGS

By supporting the SDGs, businesses primarily see the opportunity to align core business activities or innovation efforts with the needs of broader society. The importance of the Global Goals to the international community and the urgency of the issues are also frequently mentioned as reasons for contributing to the SDGs, suggesting there is an important moral aspect to corporate initiatives around the Global Goals.

Main reasons organization is contributing or planning to contribute toward SDGs (% of experts)



Total Mentions, Corporate Respondents (n=95), 2017

### Question:

What are the main reasons your company is contributing to (or is planning to contribute to) the implementation of the Sustainable Development Goals (SDGs)? Please select up to two reasons in order of importance.

# CONTACT

FOR MORE INFORMATION PLEASE CONTACT...

## GLOBESCAN



**Eric Whan**  
Sustainability Director  
eric.whan@globescan.com



**Tove Malmqvist**  
Research Manager  
tove.malmqvist@globescan.com

Toronto: +1 416 962 0707  
San Francisco: +1 415 874 3154  
London: +44 20 7253 1450  
Cape Town: +27 21 782 5541  
Hong Kong: +852 3952 7300

**GlobeScan.com**

## SUSTAINABILITY



**Aiste Brackley**  
Research & Client Manager  
brackley@sustainability.com



**Mark Lee**  
Executive Director  
lee@sustainability.com

London: +44 20 7269 6900  
New York: +1 718 210 3630  
San Francisco: +1 510 982 5003

**SustainAbility.com**

