



**GlobeScan–SustainAbility**

Survey 2019

# Evaluating Progress on the SDGs



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# Introduction

This report explores the results of the second GlobeScan-SustainAbility Survey evaluating progress 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 a blueprint to achieve a better and more sustainable future for all, by 2030.

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

Two years later, we have once again asked experts to evaluate progress on individual Global Goals, rank their relative urgency and share insights into the priorities within their own organizations. We also asked which specific Goals experts thought individual corporate sectors should focus on.

More than 450 experienced professionals from North America, Europe, Asia-Pacific, Latin America and Africa responded to our survey. Throughout this report, we draw comparisons between our findings and the data we collected from our previous SDG survey two years ago. We also examine progress made since 2005 when we first asked our pool of expert respondents to comment on global progress on sustainable development.

Polled experts agree that, to date, society's progress on sustainable development more broadly and the SDGs specifically has been inadequate. However, the proportion of experts who rate progress as poor has been shrinking since 2005, suggesting a long-term trend of experts becoming less critical.

Life Below Water, Reduced Inequalities, Life on Land and No Poverty are singled out by respondents as the SDGs where society's level of achievement has been lagging the most. Experts call out Climate Action as the most urgent Goal for society to focus on.

The private sector and investors are seen as performing poorly regarding advancing sustainable development. This suggests that asset managers and large companies are still perceived as failing to adequately leverage their global influence to create long-term value for society and the environment.

Non-governmental organizations, social entrepreneurs and the United Nations are seen as doing the most to advance the Goals, while national governments continue to be seen as making the poorest contribution to progress on sustainable development.

Overall, the survey findings underline the sense of urgency felt by global experts for key players, such as national governments, institutional investors and the private sector, to take meaningful action on achieving the Global Goals. While action, particularly on climate change, is increasing, experts note that it is failing to occur at either the scale or speed that is needed to achieve a sustainable future.



# SUSTAINABLE DEVELOPMENT GOALS



# Survey Methodology

454 qualified sustainability experts completed the online questionnaire from December 4<sup>th</sup> 2018 to January 21<sup>st</sup> 2019.

## Sectors

Respondents were drawn from the following sectors:



**6%**  
Government



**22%**  
Service & Media



**19%**  
Academic & Research



**32%**  
Corporate



**15%**  
NGO



**7%**  
Other

## Geography

Experts surveyed span 74 countries in the following regions:



**26%**  
North America



**38%**  
Europe



**19%**  
Asia-Pacific



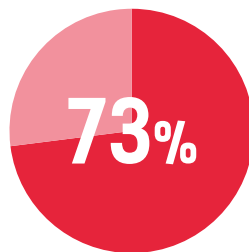
**8%**  
Latin America



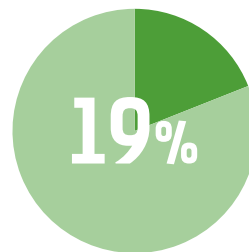
**7%**  
Africa

## Experience

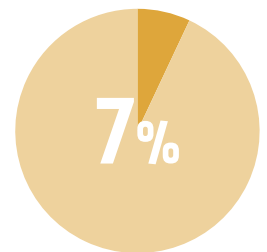
Respondents have the following experience working on sustainability issues:



More Than 10  
Years



5 to 10  
Years



3 to 4  
Years

Notable that compared to Leaders Survey we get far more European responses / fewer North American.



# Key Findings

- **Experts surveyed continue to view progress on sustainable development as inadequate, but have a more neutral view compared to two years ago.** This supports a continuing long-term trend of decreasing negativity since the question was first asked in 2005, with the proportion of experts who say progress has been poor having decreased from 85 percent to 49 percent over that time.
- **When asked which of the SDGs require the most urgent action, global experts overwhelmingly say *Climate Action*.** *Climate Action* is also the SDG receiving the most attention within organizations across a majority of regions. Yet progress on this Goal is seen more negatively than in 2017, suggesting that while it is receiving increased attention, action is viewed as highly inadequate, given the extreme urgency.
- **Non-governmental organizations, social entrepreneurs and the United Nations are seen as doing the most to advance the Goals,** while national governments continue to be seen as making the poorest contribution to progress on sustainable development.
- **Experts believe that among the 17 Goals, most progress has been made on *Partnerships for the Goals*,** suggesting that we are making some notable advances on collaborations to drive sustainability. Least progress has been made on *Reduced Inequalities* and *Life Below Water*.
- **Since 2017 a small yet increasing number of experts view progress on many individual Goals as positive.** However, the three goals that experts regard as having achieved the least progress, *Life Below Water*, *Reduced Inequalities*, and *Life on Land* have made no significant improvement and the proportion of experts saying progress on *Climate Action* has been poor has increased dramatically.
- **When asked which specific Goals particular industries should focus on experts recommend that companies focus on the ones where they can have the most obvious impact,** such as *Zero Hunger* for the Food and Agriculture sector and *Industry Innovation and Infrastructure* for the Technology sector. The financial sector is singled out alongside the extractive industry as being best placed to have impact on *Climate Action*.

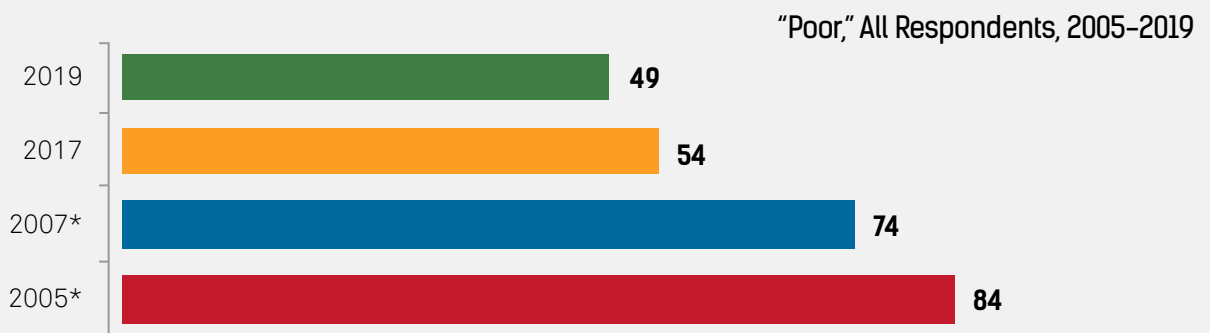
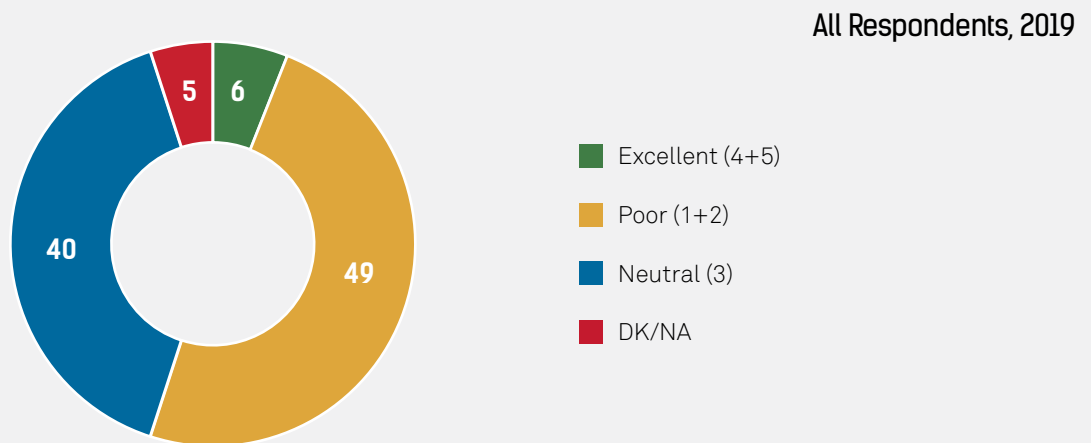
# Society's Progress on Sustainable Development



# Experts Growing Less Critical of Progress

Experts continue to rate society's progress in transitioning to sustainable development globally as mostly poor, with half of those surveyed agreeing with this negative sentiment. Very few hold a positive view of our efforts towards a sustainable future, while a fairly large proportion remain neutral.

Nevertheless, the proportion of experts who rate progress toward sustainability as poor has been shrinking, suggesting the continuation of a long-term trend of experts becoming less critical of progress since this question was first asked in 2005.



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

## Question

How would you rate the progress made to date in the transition to sustainable development globally?

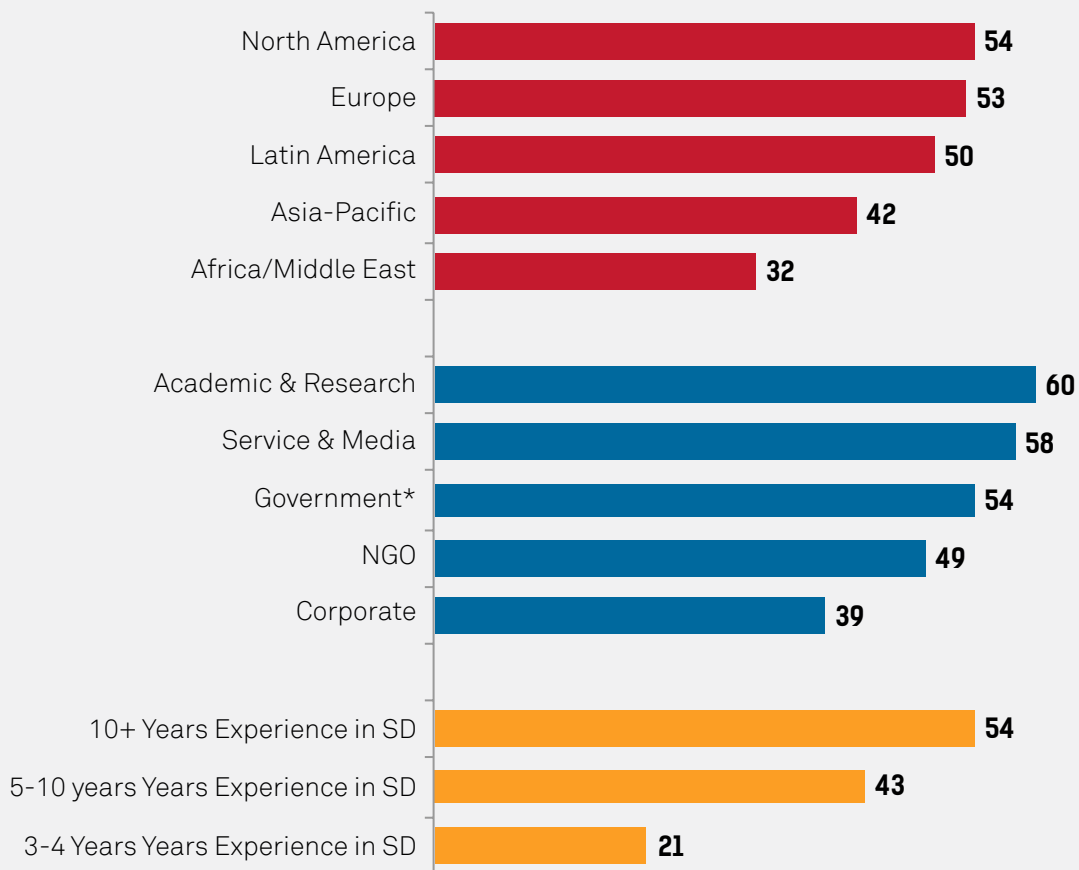
Please use the 5-point scale provided (where 1 is "very poor" and 5 is "excellent").



# Perspectives on Progress Vary by Region, Sector & Experience

Experts with more experience in the field tend to view society’s progress more negatively. As in the previous editions of this survey, experts in Asia-Pacific, Africa, and the Middle East also tend to be less negative about progress than those in Europe and North and Latin America. Experts in the corporate sector are also less cynical than those in other sectors, particularly academics.

“Poor” (1+2), by “Region, Sector and Years of Experience, 2019”



\*Small sample size (n=26)

## 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”).

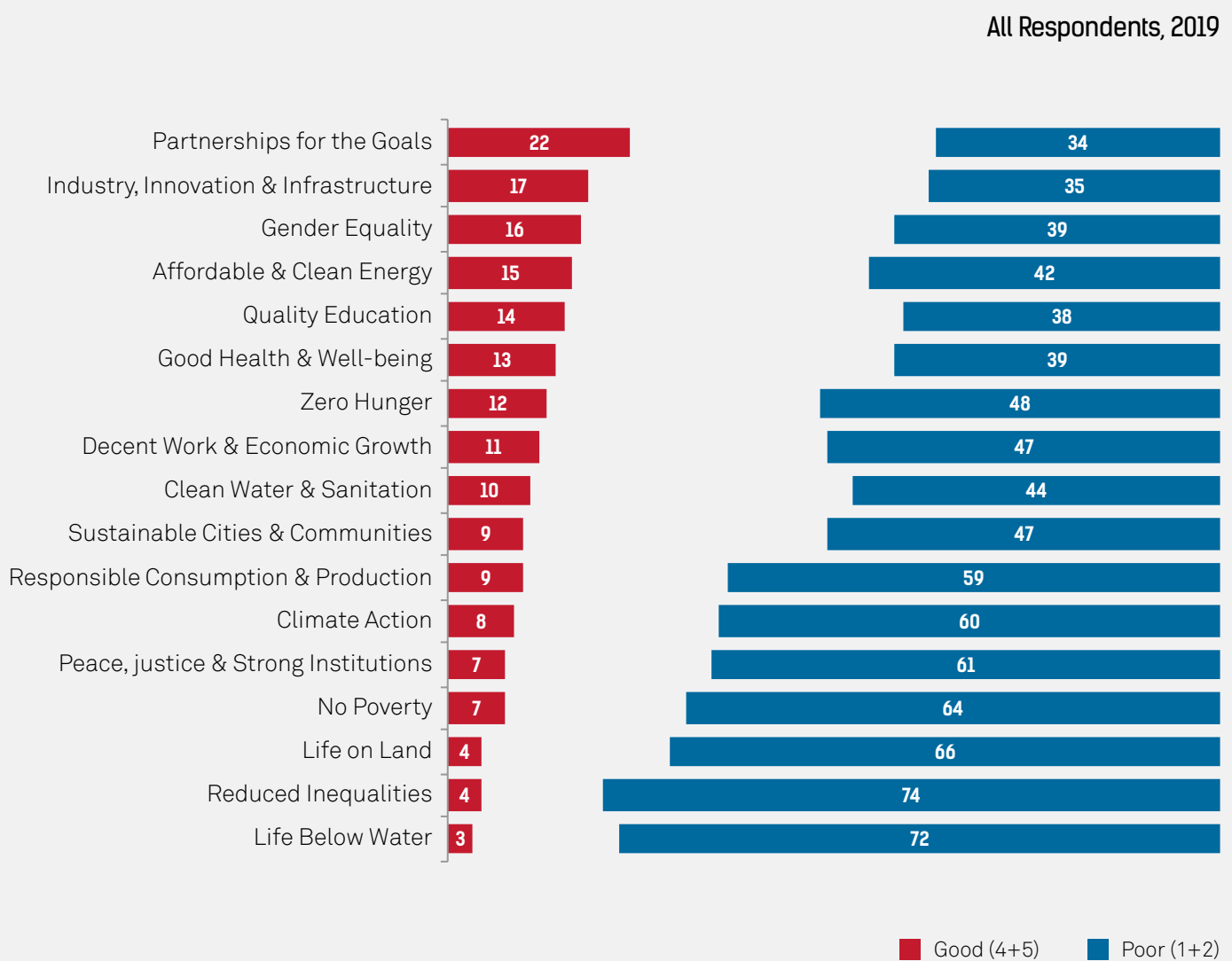


# Progress on Individual Goals



# Progress on Individual Goals Seen as Mostly Poor

Experts are more likely to rate progress on each individual SDG as poor rather than good. On seven of the seventeen Goals, a majority of experts rate progress as poor, suggesting that globally we have a long way to go to achieve a more sustainable future. Experts are particularly critical of progress made on *Reduced Inequalities*, as well as *Life Below Water*.



## Question

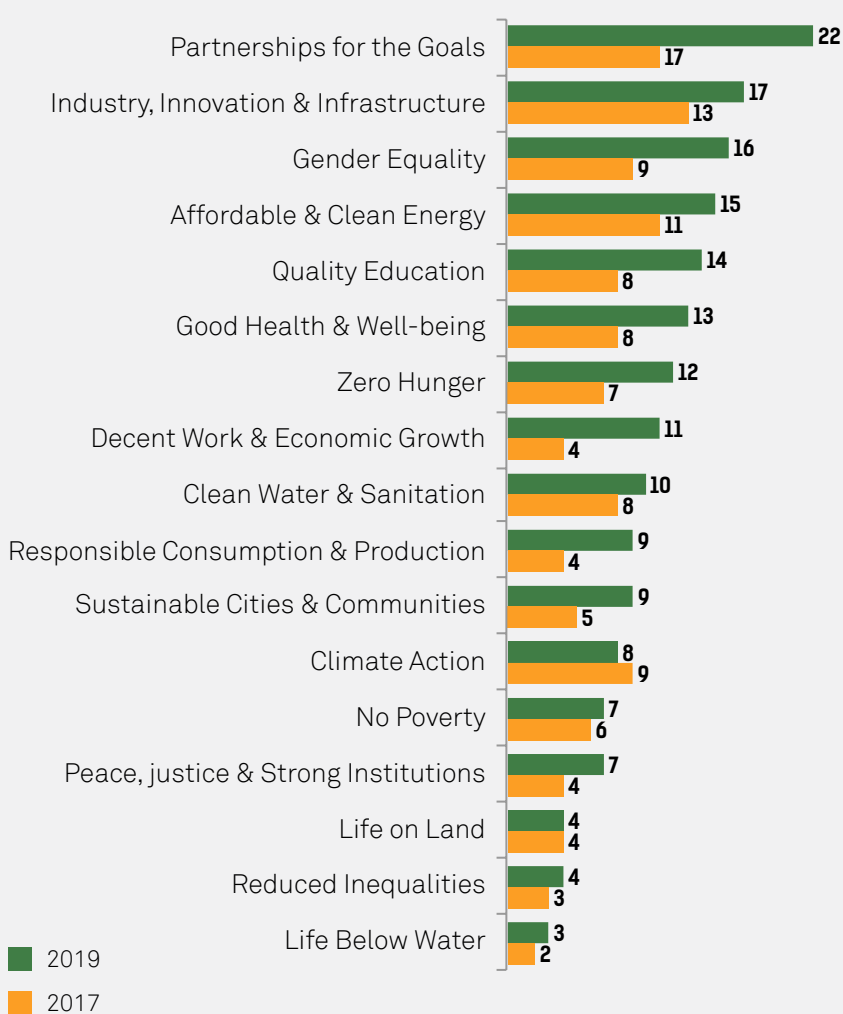
How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

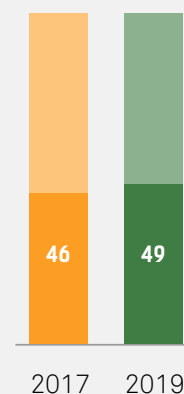
# Experts More Positive About Progress on Most Goals

Compared to two years ago, the number of experts that view progress on individual Goals positively has increased. Most notably, the proportion of experts rating progress on *Partnerships for the Goals* as “Good” has doubled compared to 2017. Experts are significantly more likely to rate progress on *Climate Action* as “Poor” than they were in 2017 (60% vs 45%, not shown in chart below).

## “Good” (4+5), All Respondents, 2017–2019



## 100-point Index of Overall Progress on SDG Goals (Based on Means), All Respondents, 2017–2019



### 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”).



# Partnerships for the Goals has Achieved Most Progress

*Partnerships for the Goals* is now seen by experts as the Goal that has achieved the most progress. *Gender Equality* is perceived by experts as having achieved greater progress than in 2017, moving from the eighth position to number four when ranked on perceived progress. Progress on *Climate Action* is viewed considerably more negatively than two years ago, moving from sixth position in 2017 down to thirteenth in 2019.

Rank Order Based on Mean Score, All Respondents, 2017–2019

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

## Question

How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

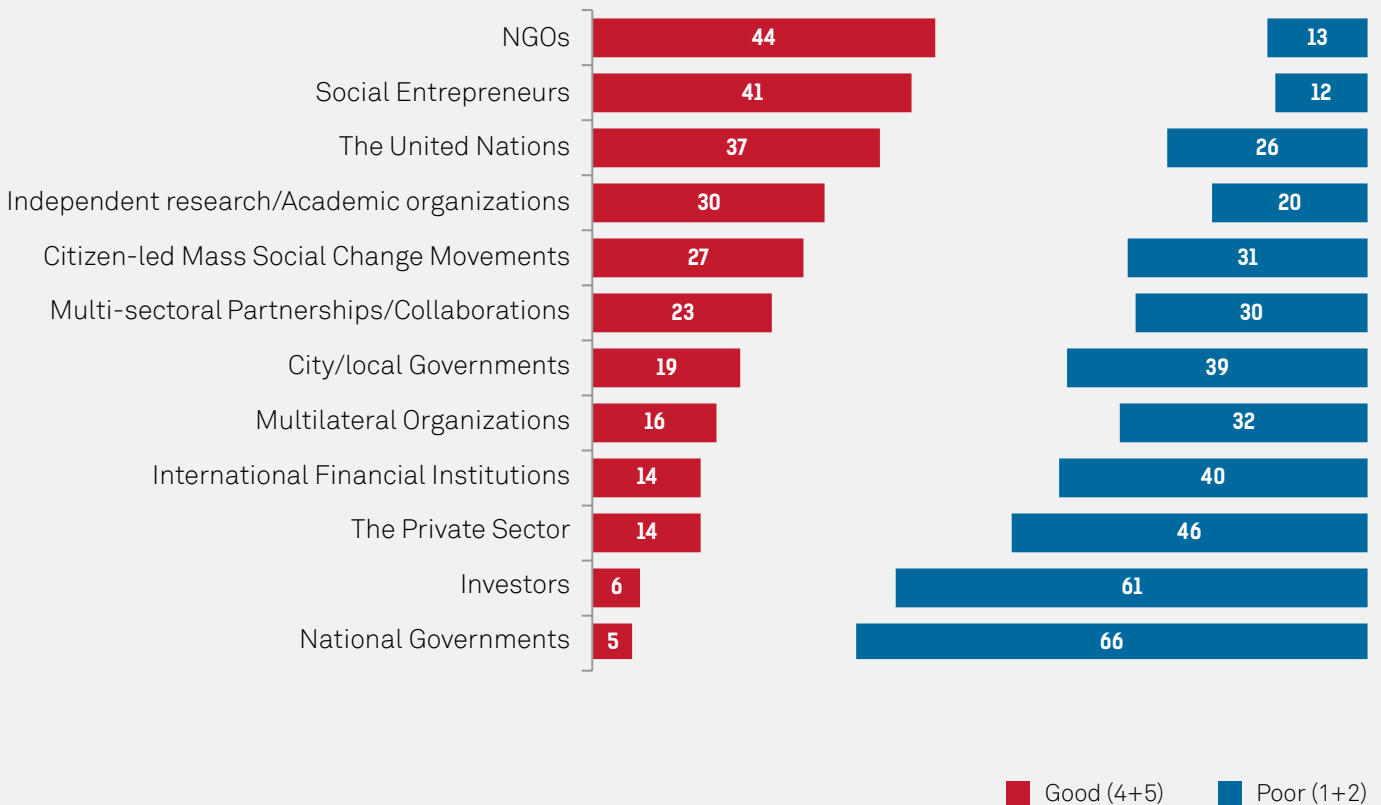
Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

# Performance of Institutions on the SDGs

# Performance by Investors & National Governments Viewed Most Negatively

Performance by NGOs, social entrepreneurs, the United Nations and independent research/academic organizations is seen as largely positive. In contrast, the performance of investors and national governments is viewed extremely negatively, with two-thirds of experts viewing their contribution as “Poor”. Action by the private sector broadly is also viewed negatively by almost half of respondents, while only one in seven experts view its contribution as “Good.”

All Respondents, 2019



## 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)?

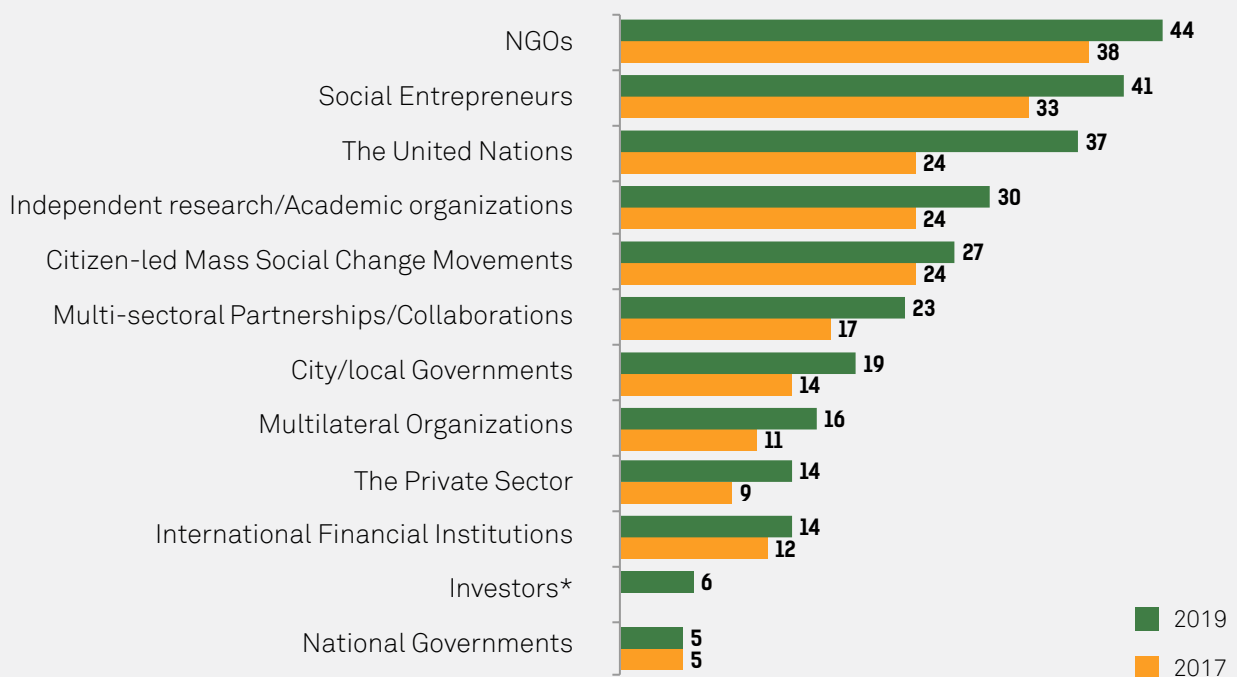
Please use the 5-point scale provided (where 1 is “poor” and 5 is “excellent”).

# NGOs, UN & Social Entrepreneurs Continue to Lead

NGOs, social entrepreneurs and the United Nations continue to be seen as driving the most progress on the SDGs and are viewed more favorably than they were in 2017.

For the first time we asked experts how they view the performance of investors in driving progress on the Global Goals. Experts have an overwhelmingly negative perspective of the contribution made by investors, despite increasing calls for action on sustainability from a small number of prominent investors. Experts also continue to see the performance of national governments as extremely poor, with only five percent having a positive view of their contribution to driving progress on the SDGs – a score which has remained unchanged since 2017.

Good (4+5), All Respondents, 2019



\*Respondents were not asked to rate the performance of investors in 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”).*



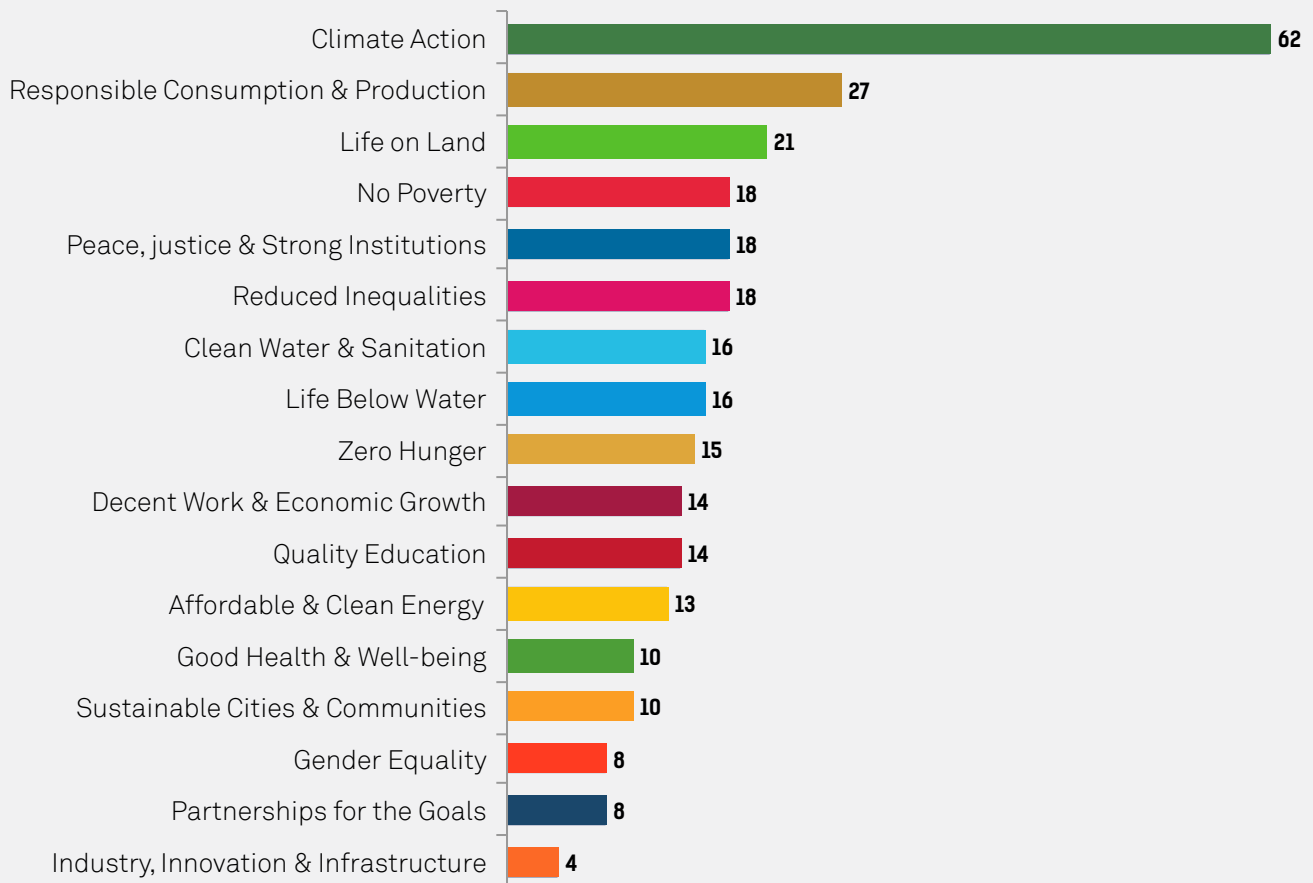
# Urgency and Attention Given to Specific Goals



# Climate Action Viewed as Most Urgent Goal

Experts overwhelmingly say that we need to take action on climate change, with *Climate Action* being far more likely than any other Global Goal to be picked by experts as requiring the most urgent action. *Responsible Consumption and Production* is viewed as the second most urgent Goal. *Industry, Innovation and Infrastructure* is seen by experts as the goal requiring the least urgent attention.

Most Urgent Goal, Total Mentions, All Respondents, 2019



## Question

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

# Climate Action Viewed as Most Urgent Goal by all Institutions

Experts from all institutions view *Climate Action* as the most urgent Global Goal. However, experts in Africa and the Middle East rank *No Poverty* as the most critical goal. Experts in Africa & Middle East, Europe and North America place more emphasis on *Responsible Consumption and Production* as a priority than do respondents from other regions.

Most Urgent Goal, Total Mentions by Sector and Region, 2019

	Most Important Goal	2 <sup>nd</sup> most Important Goal	3 <sup>rd</sup> most Important Goal
Government*	58% Climate Action	27% Life on Land	19% Reduced Inequalities
		27% No Poverty	
		27% Peace, Justice & Strong Institutions	
NGO	57% Climate Action	30% No Poverty	23% Decent Work & Economic Growth
Academic & Research	57% Climate Action	31% Responsible Consumption & Production	23% Peace, Justice & Strong Institutions
Corporate	66% Climate Action	26% Responsible Consumption & Production	24% Life on Land
Service & Media	66% Climate Action	27% Responsible Consumption & Production	24% Peace, Justice & Strong Institutions
Asia-Pacific	64% Climate Action	28% Life on Land	26% Responsible Consumption & Production
Africa/Middle East	53% No Poverty	47% Responsible Consumption & Production	32% Good Health & Well-being
Europe	63% Climate Action	28% Responsible Consumption & Production	21% Peace, Justice & Strong Institutions
North America	46% Climate Action	32% Responsible Consumption & Production	21% Clean Water & Sanitation
Latin America	47% Climate Action	32% No Poverty	29% Zero Hunger

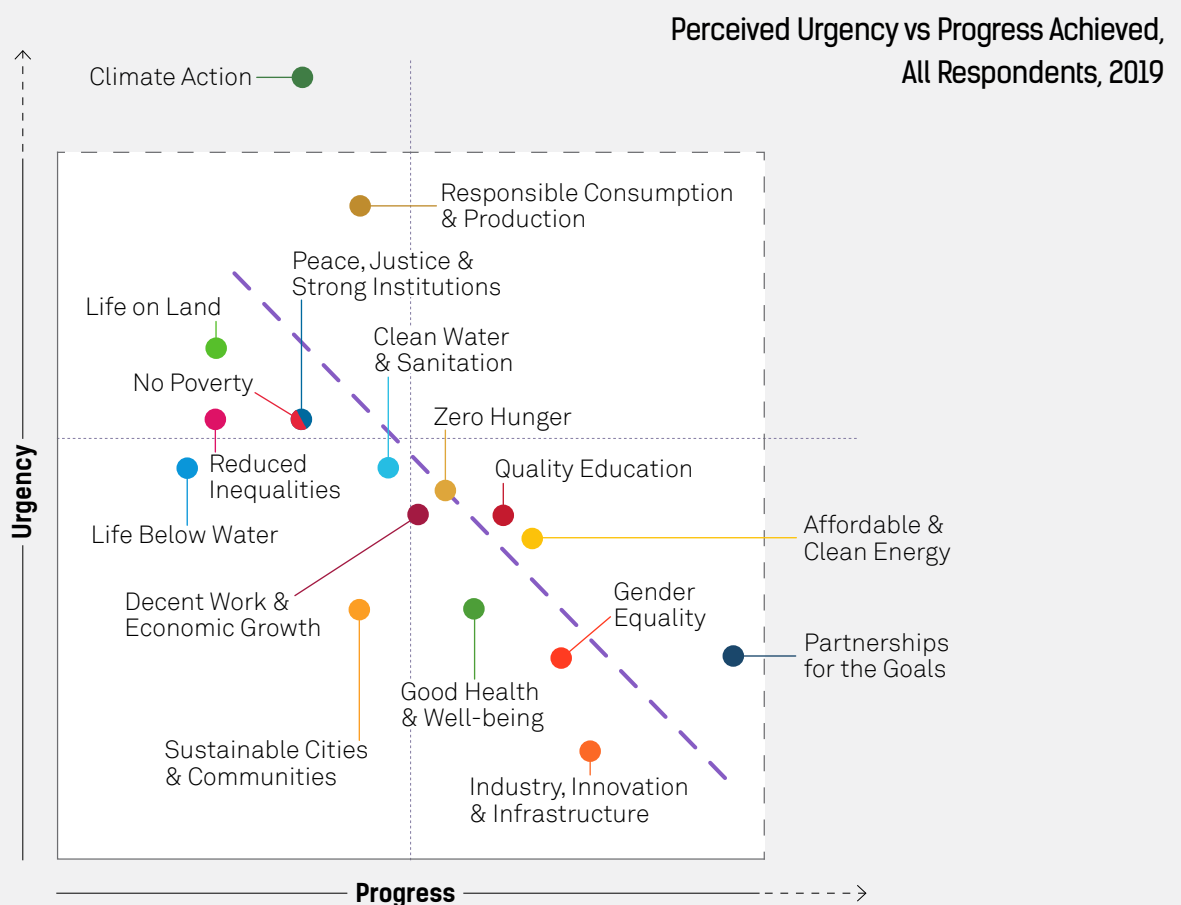
\*Small sample size (n=26)

## Question

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

# Most Urgent Goals are Making Least Progress

This scatter plot illustrates the relative perceived urgency of each Global Goal compared to the progress that experts perceive society has made so far. *Climate Action*, in particular, is viewed by experts as a Goal where society is failing to make adequate progress relative to its urgency. Notably, none of the Global Goals fall into the quadrant of both high perceived urgency and strong progress achieved. The two Global Goals that experts view society as having performed best on achieving, *Partnership for the Goals and Industry, Innovation and Infrastructure*, are also the two Goals that experts consider the least urgent.



## Questions

How would you rate society's performance to date in having achieved progress toward each one of the Sustainable Development Goals (SDGs)?

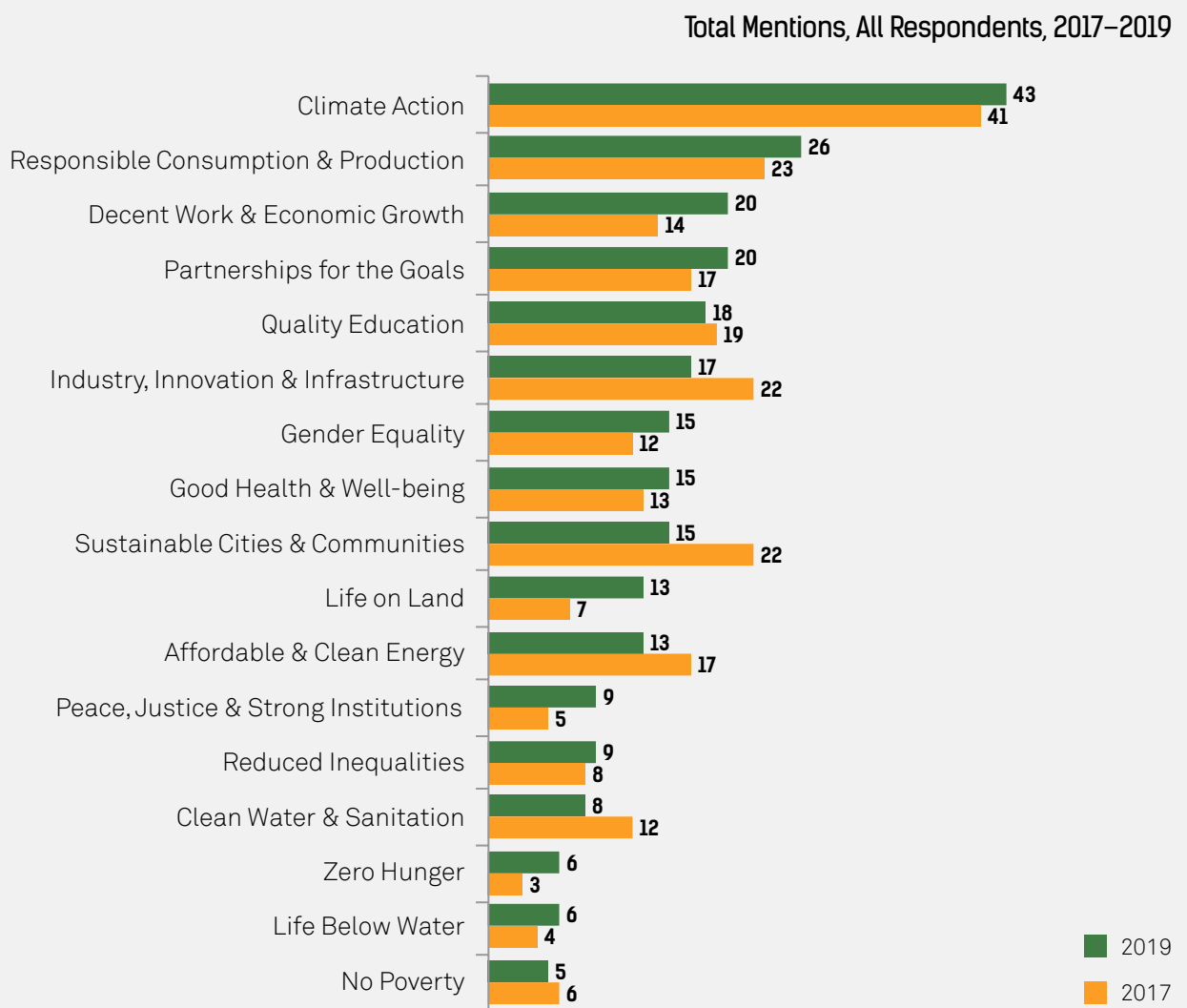
Please use the 5-point scale provided (where 1 is "poor" and 5 is "excellent").

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

Please choose at most three goals.

# Climate Action Receives Most Attention Within Organizations

When asked which SDGs receive the most attention in their own organizations, experts are most likely to name *Climate Action*. *Responsible Consumption and Production* is also frequently mentioned. In contrast, very few respondents mention *No Poverty*, *Life Below Water*, or *Zero Hunger* as Global Goals that their organization is focused on addressing. *Industry, Innovation and Infrastructure* as well as *Sustainable Cities and Communities* are mentioned less frequently as priorities compared to 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.*

# Climate and Responsible Consumption & Production Receive Most Attention Across Regions & Sectors

Respondents across sectors and regions tend to prioritize *Climate Action* in their own organization or work. However, the *Academic and Research* sector, as well as those in Africa and the Middle East, tend to focus more on *Quality Education*. *Responsible Consumption and Production* tends to be a secondary priority in most sectors and regions.

By Sector and Region, Total Mentions, 2019

	SDG Receiving Most Attention	SDG Receiving 2 <sup>nd</sup> Most Attention	SDG Receiving 3 <sup>rd</sup> Most Attention
Government*	42% Climate Action	23% Gender Equality	19% Various
		23% Life on Land	
NGO	29% Climate Action	21% Good Health & Well-being	19% Gender Equality
		21% Partnerships for the Goals	
		21% Responsible Consumption & Production	
Academic & Research	41% Quality Education	35% Climate Action	22% Partnerships for the Goals
			22% Peace, Justice & Strong Institutions
Corporate	56% Climate Action	31% Responsible Consumption & Production	22% Decent Work & Economic Growth
Service & Media	44% Climate Action	29% Responsible Consumption & Production	24% Industry, Innovation & Infrastructure
Asia-Pacific	44% Climate Action	28% Responsible Consumption & Production	26% Decent Work & Economic Growth
Africa/Middle East	35% Quality Education	32% Good Health & Well-being	21% Peace, Justice and Strong Institutions
Europe	44% Climate Action	26% Responsible Consumption & Production	22% Decent Work & Economic Growth
			22% Partnerships for the Goals
North America	53% Climate Action	26% Responsible Consumption & Production	20% Industry, Innovation & Infrastructure
Latin America	32% Climate Action	21% Gender Equality	21% Industry, Innovation & Infrastructure
		21% Responsible Consumption & Production	21% Decent Work & Economic Growth

\*Small sample size (n=26)

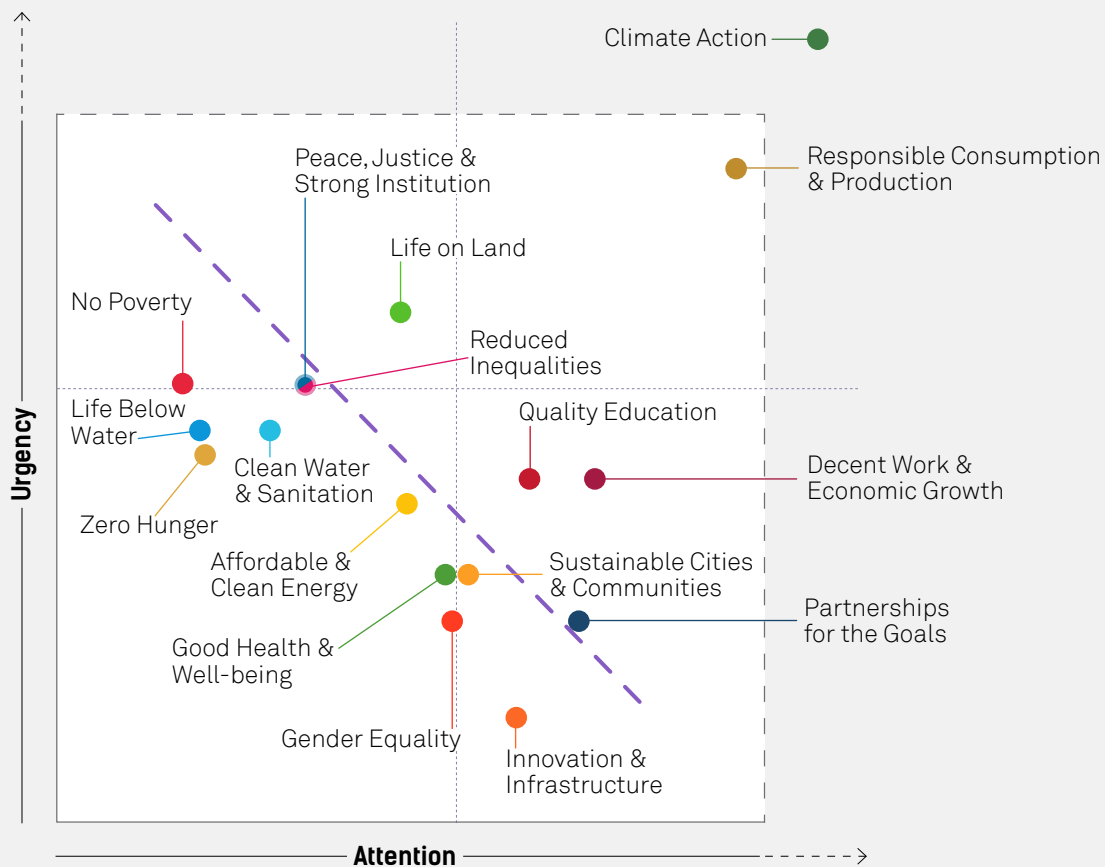
## Question

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 Received

Experts name *Climate Action*, and to a lesser extent *Responsible Consumption and Production*, as receiving the most attention within their organizations. These Goals are also seen as the most critically urgent. The relationship between attention received and perceived urgency for the other Global Goals appears somewhat inverse, with relatively less urgent goals, such as *Partnership for the Goals* and *Industry, Innovation and Infrastructure*, generally receiving more attention.

Perceived Urgency vs Attention Received, All Respondents, 2019



## Questions

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

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.

# SDG Focus Areas for Industries





# Recommended Focus on Goals Varies by Sector

When asked which two Sustainable Development Goals that companies within particular sectors should focus on to make the greatest contribution toward achieving the Goals, results vary. Experts recommend that companies focus on specific Goals where their industry can have the most impact.

Priority Goals, Total Mentions (Ranked #1 or #2), All Respondents,\* 2019

Industry	1 <sup>st</sup> Priority SDG		2 <sup>nd</sup> Priority SDG		3 <sup>rd</sup> Priority SDG	
Apparel	67%	Responsible Consumption & Production	47%	Decent Work & Economic Growth	12%	Climate Action
					12%	Reduced Inequalities
Energy and utilities	75%	Affordable & Clean Energy	54%	Climate Action	17%	Industry, Innovation & Infrastructure
Extractives	56%	Climate Action	35%	Affordable & Clean Energy	28%	Responsible Consumption & Production
Financial service	31%	Climate Action	27%	Decent Work & Economic Growth	26%	Reduced Inequalities
Food and agriculture	53%	Zero Hunger	34%	Responsible Consumption & Production	32%	Life on Land
Home furnishings	72%	Responsible Consumption & Production	19%	Decent Work & Economic Growth	18%	Climate Action
			19%	Life on Land		
Pharmaceuticals and healthcare	85%	Good Health & Well-being	22%	Responsible Consumption & Production	18%	Clean Water & Sanitation
Technology	47%	Industry, Innovation & Infrastructure	27%	Climate Action	21%	Responsible Consumption & Production

\*Respondents were randomly assigned 5 of 8 industries

## Question

Which two Sustainable Development Goals (SDGs) should companies within each of these industries focus on to make the greatest contribution toward achieving the Goals?

*Please choose at most two goals for each industry, in order of priority.*

# I Expert Advice



# Driving Greater Progress

We asked respondents to share advice on what would enable greater progress on SDGs. Below we share some quotes and the key themes that emerged.

## “ Advice to Business

“From a private sector lens, businesses should go beyond just aligning their existing initiatives in an ad hoc manner against the SDGs but should consider systematically adopting the 2030 development agenda as a framework for moving from specific sectoral commitments to a broader, more holistic approach to sustainability. This is the only way the SDGs can become transformative versus the superficial adoption that most companies tend to do.” - *Corporate, Indonesia*

“Each contributor should honestly focus their activity on the SDGs where they can contribute in the strongest way (based on their strengths and experience) and not treat the SDGs as a form of check-list believing they can contribute in a strong way across the board.” - *Corporate, Belgium*

## “ Collaborating to achieve the Goals

“Currently, the efforts of corporations, national governments and other institutions are scattered and haphazard. The challenges faced by each region are unique to that region or nation alone, so these stakeholders should together form coalitions and make progress towards commonly defined objectives and SDGs to create faster progress within each nation/region.” - *Corporate, Austria*

“There is a need to focus on reducing inequalities. A lot can be achieved, even with the currently available resources, with a strong focus on leaving no one behind. Global solidarity will be a strong pillar in the attainment of the SDGs.” - *Government, Kenya*

## Question

If you have a bit more time and are willing, please share your advice about how society can make the greatest progress toward the SDGs between now and 2030 in the space below.

“There is a lot of political instability in the developed world at the moment and it’s distracting from the reality that if we don’t address climate change and the crisis affecting the oceans, our planet will no longer be habitable. NGOs and large multilateral organisations like the UN are working to raise awareness of this but without action from legislators (national governments) nothing will change.” - *NGO, UK*

## “ Rethinking Growth

“First, regarding the goal Decent Work and Economic Growth, there is no such thing as “sustainable growth”. Most of our current socioenvironmental problems have been indirectly produced by the concept of economic growth that has no base on any natural science. One big step towards sustainability is to set a “steady state economics” goal, initially based on de-growth, as a better paradigm for development. It is simply about equilibrium and to stop the imbalance of our current economic system.” - *Academic/Research, Chile*

“Reducing consumption and population growth will have the most impact and lead to greatest progress toward the SDGs.” - *NGO, Netherlands*

## “ Engaging Youth

“Focus on the young generations, at schools sustainable development subjects should be part of the education/awareness.” - *Services, Bulgaria*

“All actors need to work together to achieve progress. We have left out the youth who are the ones who need to be part of this process for a ‘better future for all.’” - *NGO, Bangladesh*

“Involve young people as much as possible. They will own the current interventions and discover other innovative development ideas.” - *NGO, Kenya*

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