Climate Decision Maker Survey

Report of Wave Two Results

June 2009

THE WORLD BANK
UNEP
IDRC CRDI
IUCN
PEW CENTER Global CLIMATE CHANGE
WORLD ENERGY COUNCIL
CONSEIL MONDIAL DE L'ENERGIE
World Business Council for Sustainable Development
The Centre
ICLEI Local Governments for Sustainability
COM+
GLOBESCAN

GlobeScan Incorporated subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

Project: 2286, GlobeScan®

For more information, contact:

Eric Whan
Director, SD and Environment
GlobeScan Incorporated
65 St. Clair Avenue East, Suite 900
Toronto, Canada M4T 2Y3
tel: +1 416.969.3087
Eric.Whan@globescan.com
www.GlobeScan.com

Doug Miller
President
GlobeScan Incorporated
6 Union Warf, 23 Wenlock Road
London N1 7SB UK
tel: +44 (0)20.7253.1425
Doug.Miller@globescan.com
www.GlobeScan.com

THE GLOBAL COMPACT
WE SUPPORT
QMI REGISTERED
ISO9001:2000 registered
GLOBESCAN

Table of Contents

CLIMATE DECISION MAKERS SURVEY

GLOBESCAN

Introduction

CLIMATE DECISION MAKERS SURVEY

- The Climate Decision Makers Survey is unique. It tracks the views of professionals who are in a position to make or influence large decisions regarding climate change in their organizations and society. It provides an essential ground-up view of the barriers and opportunities facing global society's response to climate change.
- The survey is the second of a multi-year initiative by GlobeScan, supported by an association of organizations in the public and private sector working on climate related matters. These include UNEP, the World Bank, IUCN, IDRC, WBCSD, ICLEI Local Governments for Sustainability, the World Energy Council, and The Centre. The results of these studies will be broadly publicized to help guide climate change decision making in all sectors.
- This report analyzes the findings from the second wave of research conducted from November 10, 2008, to December 1, 2008.

Notes to Readers

- Unless otherwise noted, all figures in charts are percentages.
- Total percentages may not add to 100 because of rounding.
- In the case of bar charts, white space typically represents the portion of experts who either answered "do not know" or did not answer at all (i.e., DK/NA).

GLOBESCAN

Description of Respondents Surveyed

CLIMATE DECISION MAKERS SURVEY

- Expert networks of partner organizations and individuals hand-picked for their expertise were invited to participate in this second wave survey on climate change solutions.
- In total, 993 qualified climate change decision makers completed the survey by the closing date of January 1st, 2009.
- The findings in this report represent the views of senior officials in government, business leaders, scientists/academics, and civil society leaders spread across more than 100 countries. The following table and slides illustrate the composition of respondents by sector and geographical location.
- In addition to having global and sectoral representation, 69 percent of respondents have been working in fields related to climate change solutions or sustainable development for at least six years.
- In terms of their role in their organizations, 47 percent indicate they are in a senior role, with a further 23 percent holding middle level positions; 49 percent identify themselves as solution influencers, 22 percent as planners/developers, 8 percent as decision implementers, and 11 percent as decision makers.

GLOBESCAN

Profile of Respondents

CLIMATE DECISION MAKERS SURVEY

By Sector and Region, 2008

	Institutional	Multilateral	Government	NGO	Private Sector	Media	Total
Europe	12	2	9	8	13	1	44
North America	6	1	6	6	8	1	27
Asia	2	1	2	2	2	0	8
Africa	2	1	2	1	1	0	7
Latin America and the Caribbean	2	*	2	2	1	0	7
Oceania (incl. Australia and New Zealand)	1	*	2	*	2	0	5
Other	1	*	*	*	*	0	2
Total	26	5	22	18	28	1	100

*Less than one percent

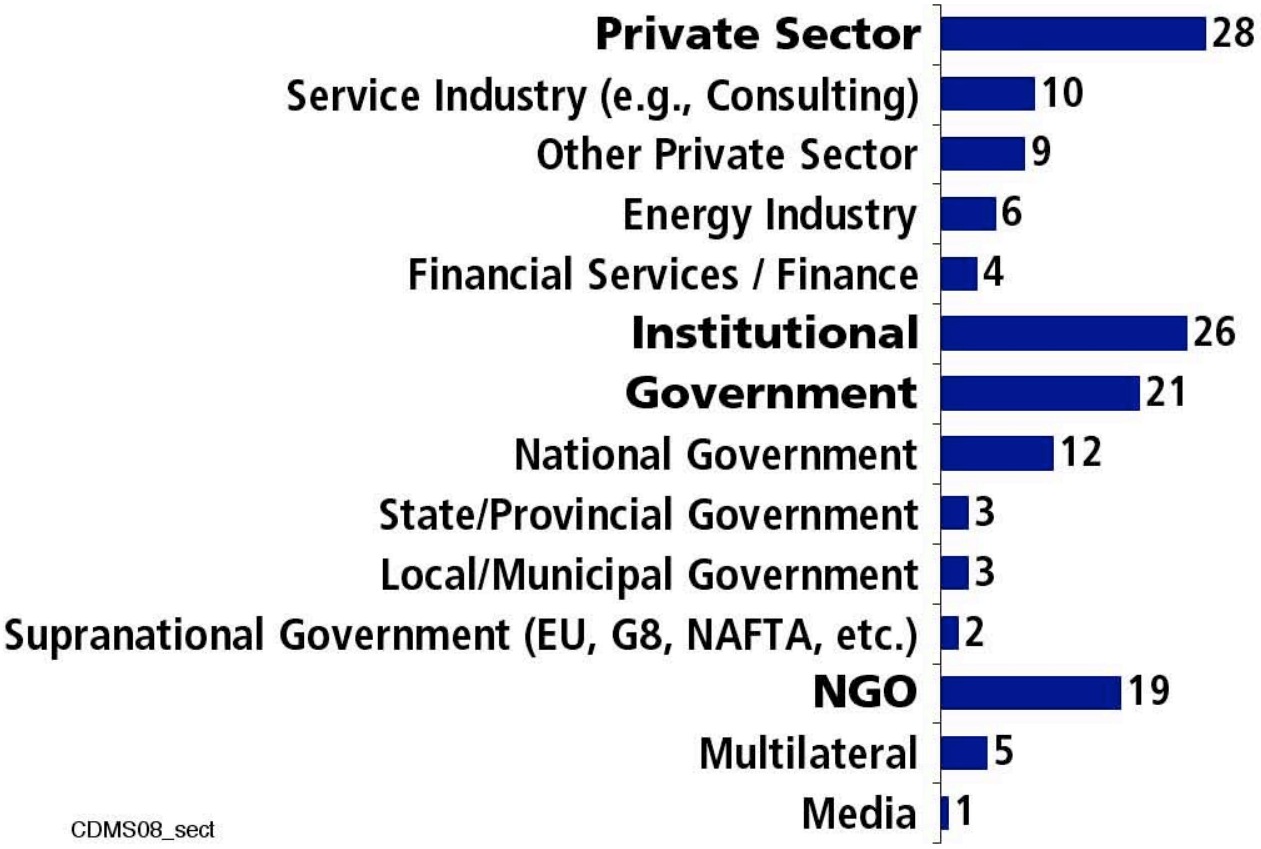
CDMS08_profile

GLOBESCAN

Profile of Respondents

CLIMATE DECISION MAKERS SURVEY

By Sector, 2008

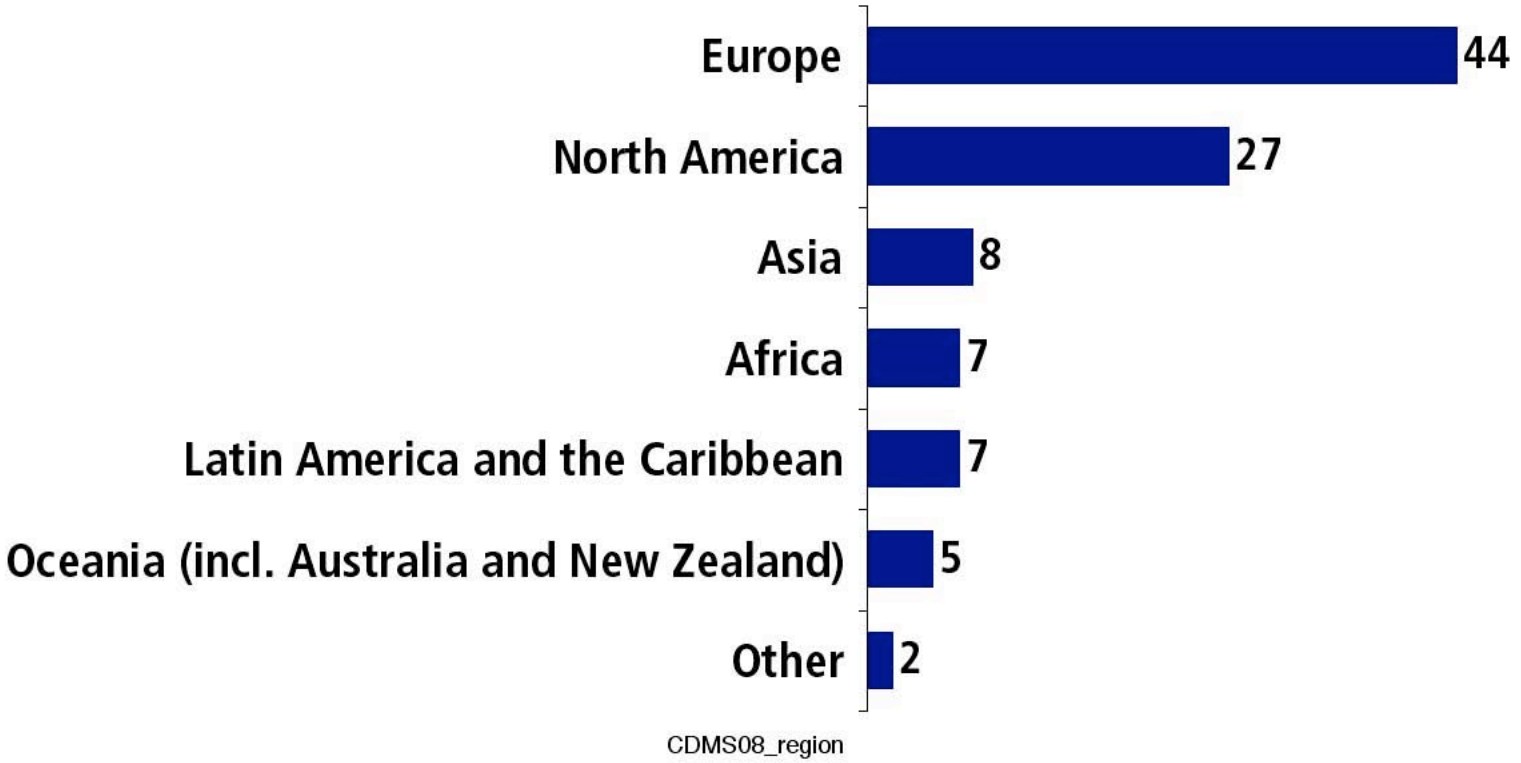


GLOBESCAN

Profile of Respondents

CLIMATE DECISION MAKERS SURVEY

By Region, 2008

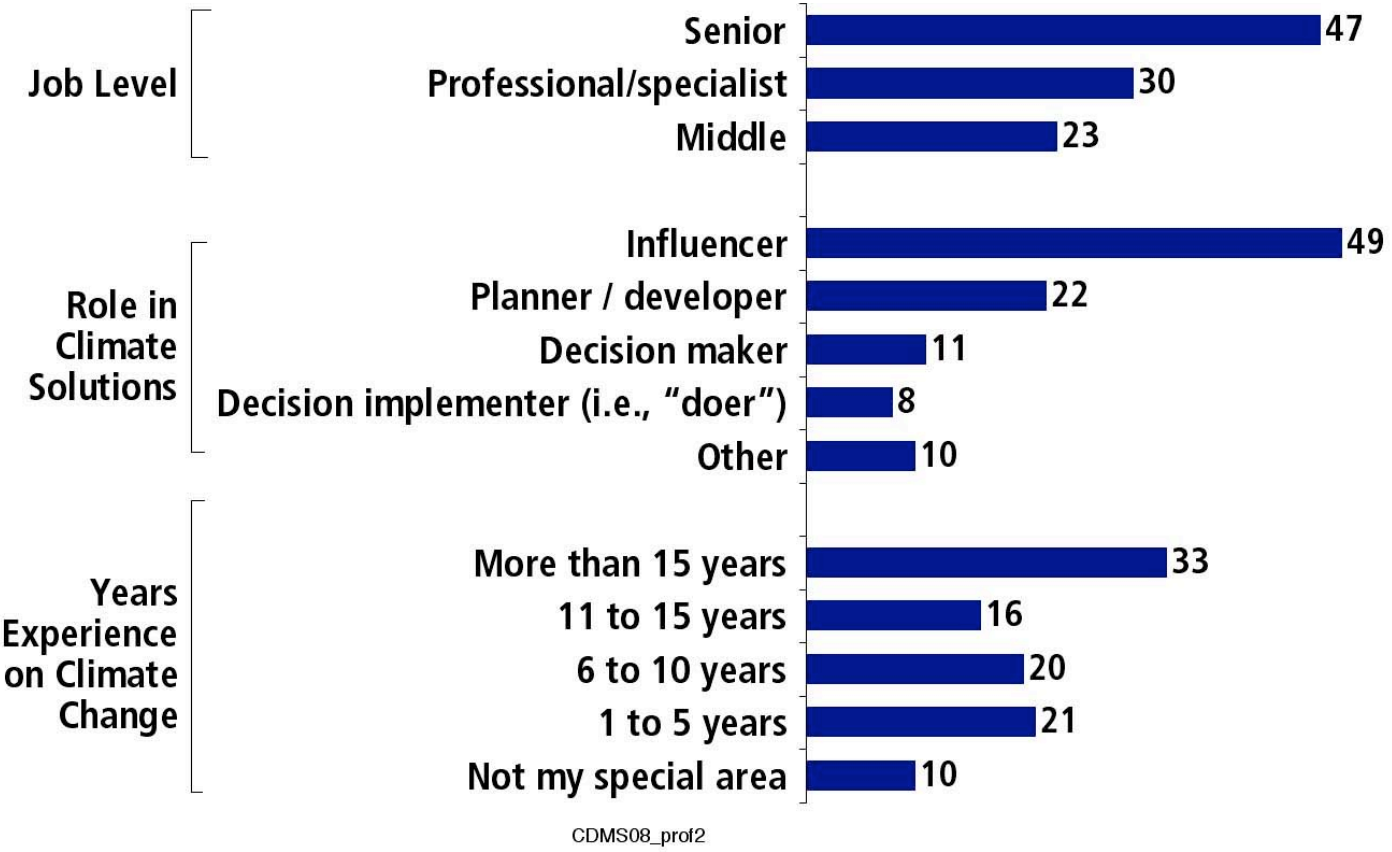


GLOBESCAN

Profile of Respondents

CLIMATE DECISION MAKERS SURVEY

By Job Level, Role in Climate Decisions, and Years Experience, 2008



GLOBESCAN

Executive Summary

Executive Summary

CLIMATE DECISION MAKERS SURVEY

- This latest Survey of Climate Change Decision Makers foretells a challenging environment for progress on climate change over the next five years. There is little consensus among experts on what the best solutions to climate change are, and they identify many obstacles.
- There is a significant level of pessimism about the impact that the economic crisis will have on climate efforts. Furthermore, decision makers believe that more political and regulatory clarity is needed for investment to attain an adequate level.
- Still, experts strongly believe that pro-climate action and economic growth and recovery are, or at least can be, synergistic or complimentary. The challenge, then, is how to move from from the status quo, where economic problems hinder investment in climate-friendly solutions, to the desired state, where economic growth economic recovery reinforce each other.
- Experts need bigger budgets to address climate change. But they believe funding won't be made available until more certainty is achieved on the policy and regulatory side. The 2009 COP in Copenhagen, and how individual states implement its outcomes, must provide that clarity. Given the world's current focus on the economy, nuclear threats, failed states and other high priority issues, securing the strong deal that decision makers say is needed may be difficult.
- Experts believe that carbon emissions must carry significantly higher costs. Different options exist for pricing carbon, with experts favoring carbon taxation and trading systems to varying degrees. However, the political support required for such high carbon prices may take considerable time to achieve, or a catastrophe.

GLOBESCAN

Executive Summary, cont'd

CLIMATE DECISION MAKERS SURVEY

- Those with the most power to take action—governments of large countries—are thought by experts to have the worst performance record on climate change decision making. Those with the least power are seen as the most effective. The most powerful actors need good political reasons to make climate friendly decisions. Further pressure from businesses and consumers appears to be required.
- Even though society has focused on energy efficiency the longest compared with other approaches to emissions management, experts believe that a great deal of opportunity remains in this area. Most solution providers say they will continue to focus here. Given the slow rate of progress achieved to date, the survey results raise the question of what should be done differently going forward.
- The survey results suggest that considerable business opportunities exist for providers of clean(er) technologies, especially energy technologies.
- Solar and wind are viewed to have more climate-friendly potential than nuclear energy, biofuels and large scale hydro, as well as carbon capture and storage, but the latter group appears to be attracting significant investment. Experts do believe that each of these energy sources has some role to play.
- Among adaptation measures, solution providers prioritize fresh water management and enhanced food security, but also new policy-making approaches that holistically integrate climate change considerations into all types of types of policy and development decision making. Perhaps this is the step change that is required to make significant progress on society's adaptive capacity.

GLOBESCAN

Detailed Findings

Climate Change Economics

Climate Change Economics

CLIMATE
DECISION MAKERS SURVEY

Climate change action should not and need not be sacrificed to economic recovery

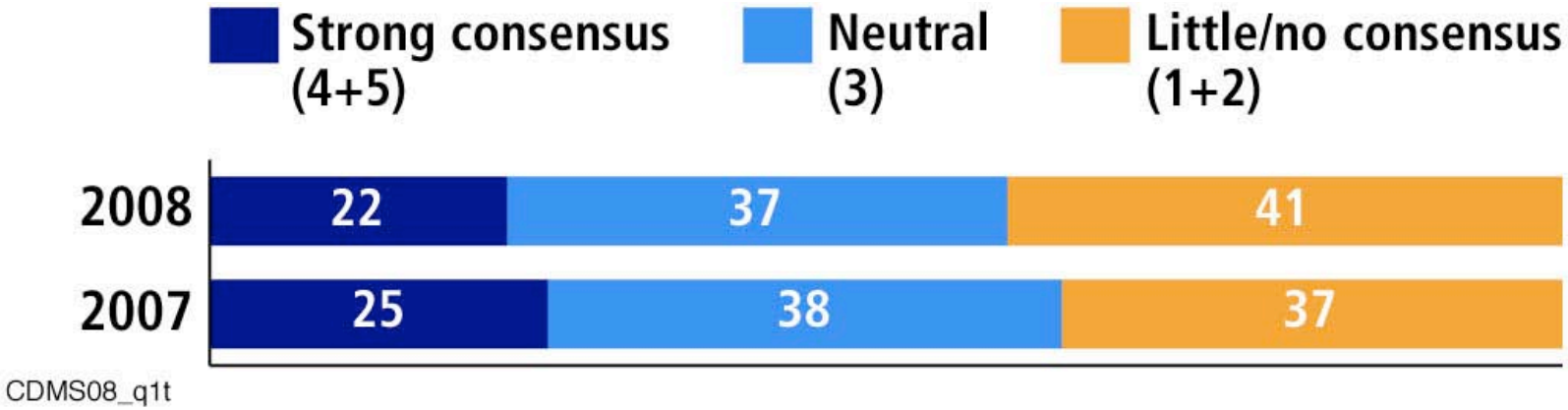
- Given the ongoing debate and international negotiations aimed at concretizing future climate change strategies, decision makers remain certain that there exists little consensus, globally, on what are the best solutions to climate change.
- Given current global economic conditions, it is not surprising that a plurality of four in ten decision makers believes that the current economic crisis will significantly compromise the achievement of effective climate change agreements. In fact, one in ten respondents point to the financial crisis as being the greatest barrier to success at COP14 in Poznan.
- That said, decision makers are optimistic about the economy and combating climate change, with three-quarters believing equitable economic development and significant progress in combating climate change can be achieved simultaneously. While some see the financial crisis as a time to cut climate budgets, others see it as an opportunity to capitalize on new technologies and innovation.
- A separate GlobeScan survey of the general public—23,000 adults in 23 countries—further illustrates widespread support for addressing climate change even in these hard economic times: four in ten people across the world do not see an imminent threat to their national economy if climate change emissions are reduced.

GLOBESCAN

Consensus within Influential Circles on Best Solutions to Climate Change

CLIMATE DECISION MAKERS SURVEY

2007–2008



The white space in this chart represents “DK/NA.”

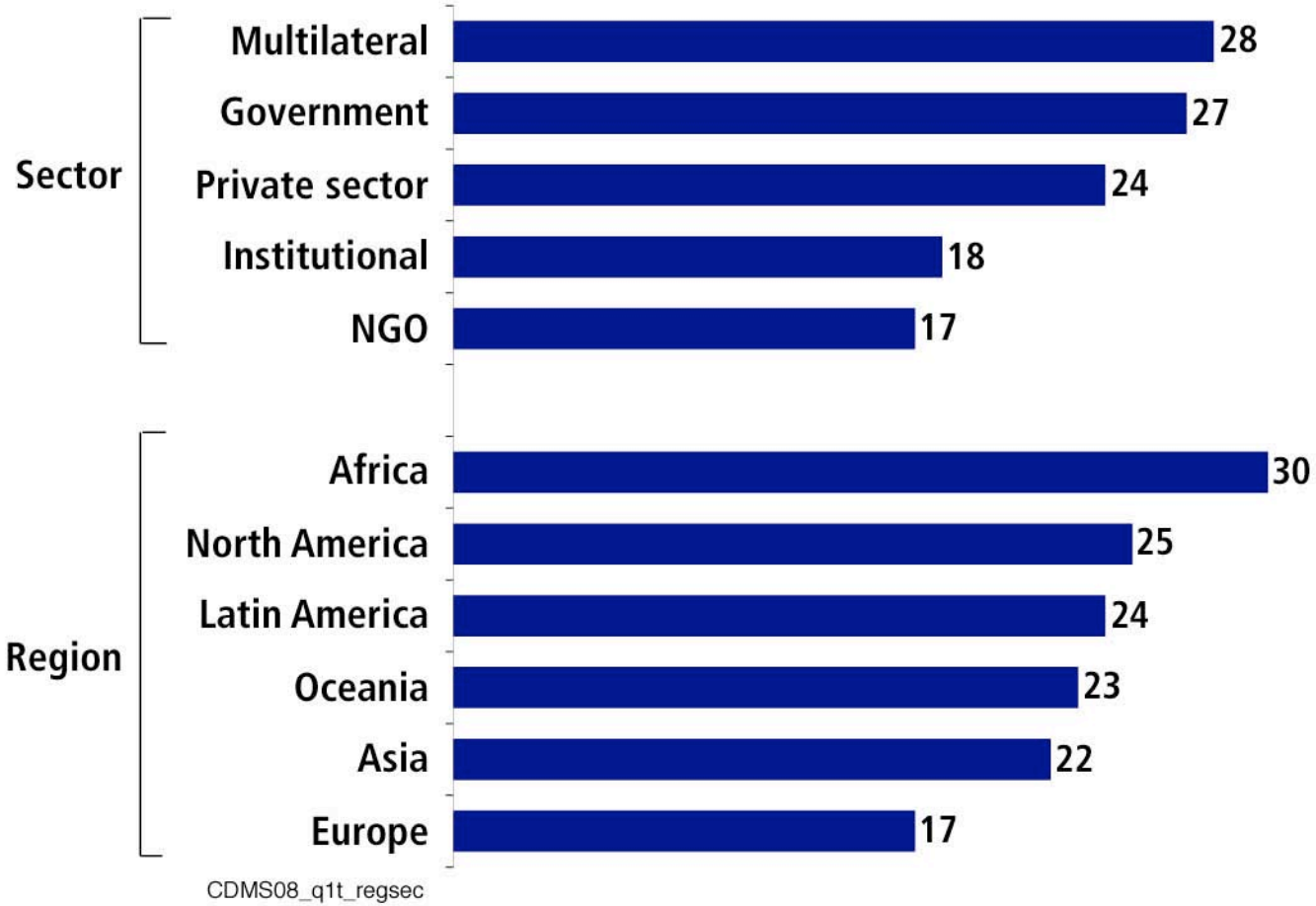
Q1t. How much consensus do you think there is within the most influential circles globally on what are the best solutions to climate change?

GLOBESCAN

Consensus within Influential Circles on Best Solutions to Climate Change

CLIMATE DECISION MAKERS SURVEY

"Strong Consensus (4+5)," by Sector and Region



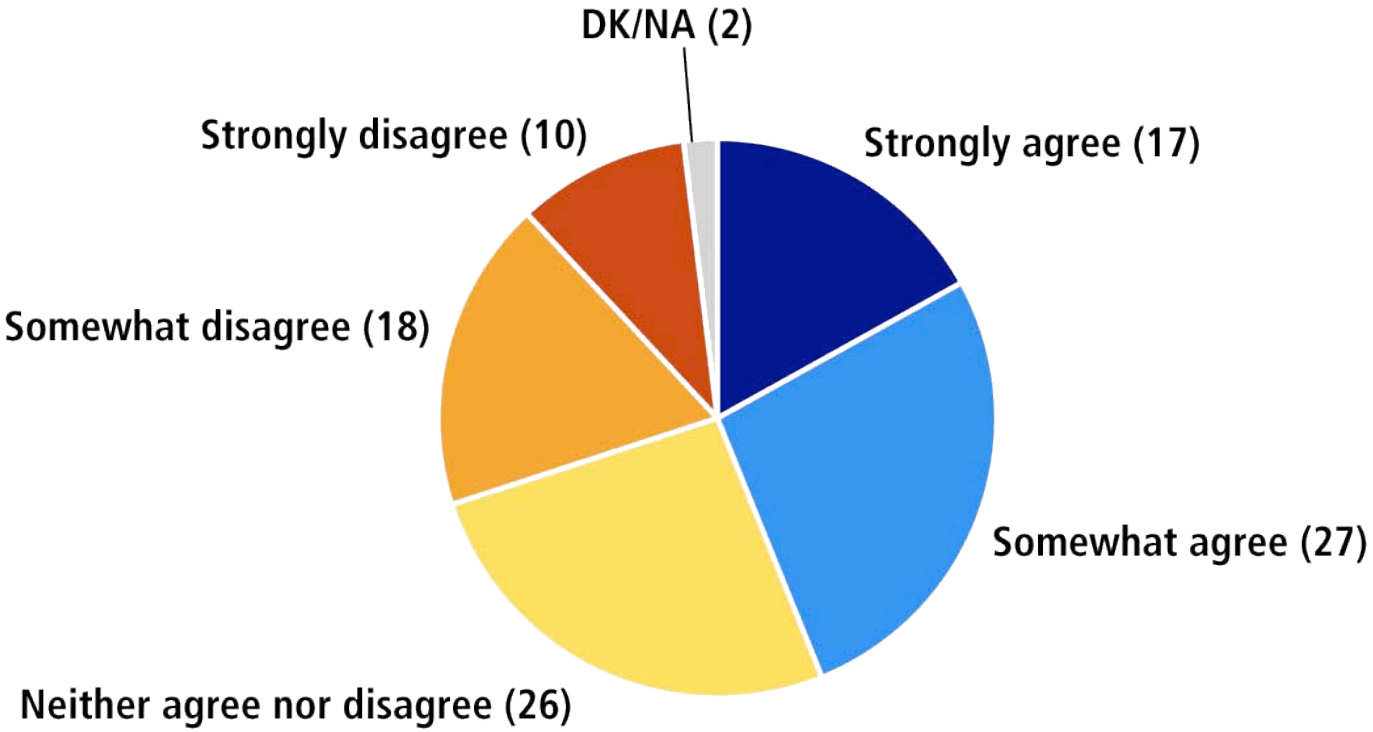
Q1t. How much consensus do you think there is within the most influential circles globally on what are the best solutions to climate change?

GLOBESCAN

Current Economic Crisis Will Significantly Delay/Compromise Achievement of Effective Climate Change Agreements

CLIMATE DECISION MAKERS SURVEY

2008



CDMS08_q21c

21. Please indicate to what extent you agree or disagree with each of the following statements:

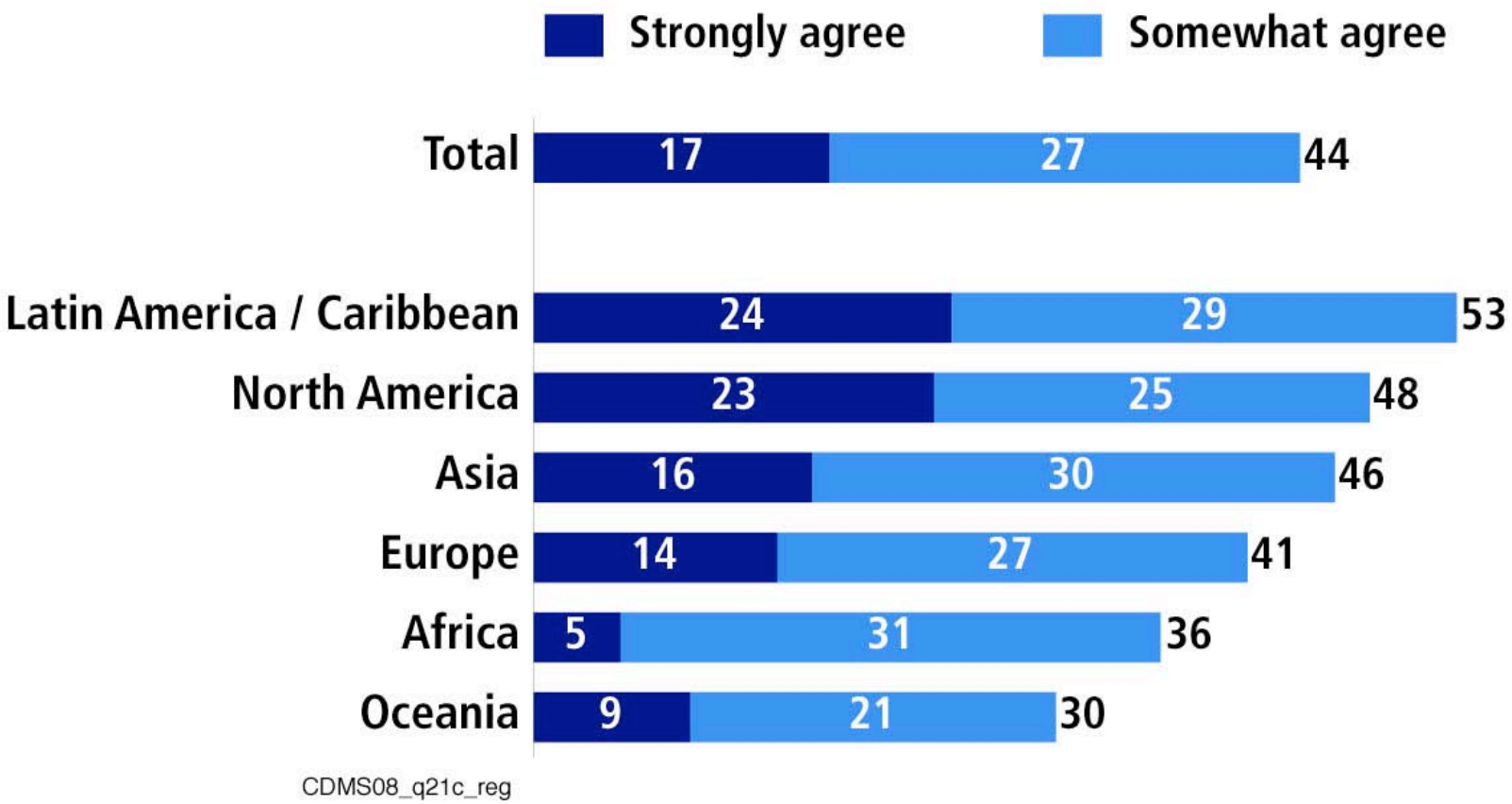
c. The current economic crisis will significantly delay or compromise the achievement of effective climate change agreements.

GLOBESCAN

Current Economic Crisis Will Significantly Delay/Compromise Achievement of Effective Climate Change Agreements

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



21. Please indicate to what extent you agree or disagree with each of the following statements:

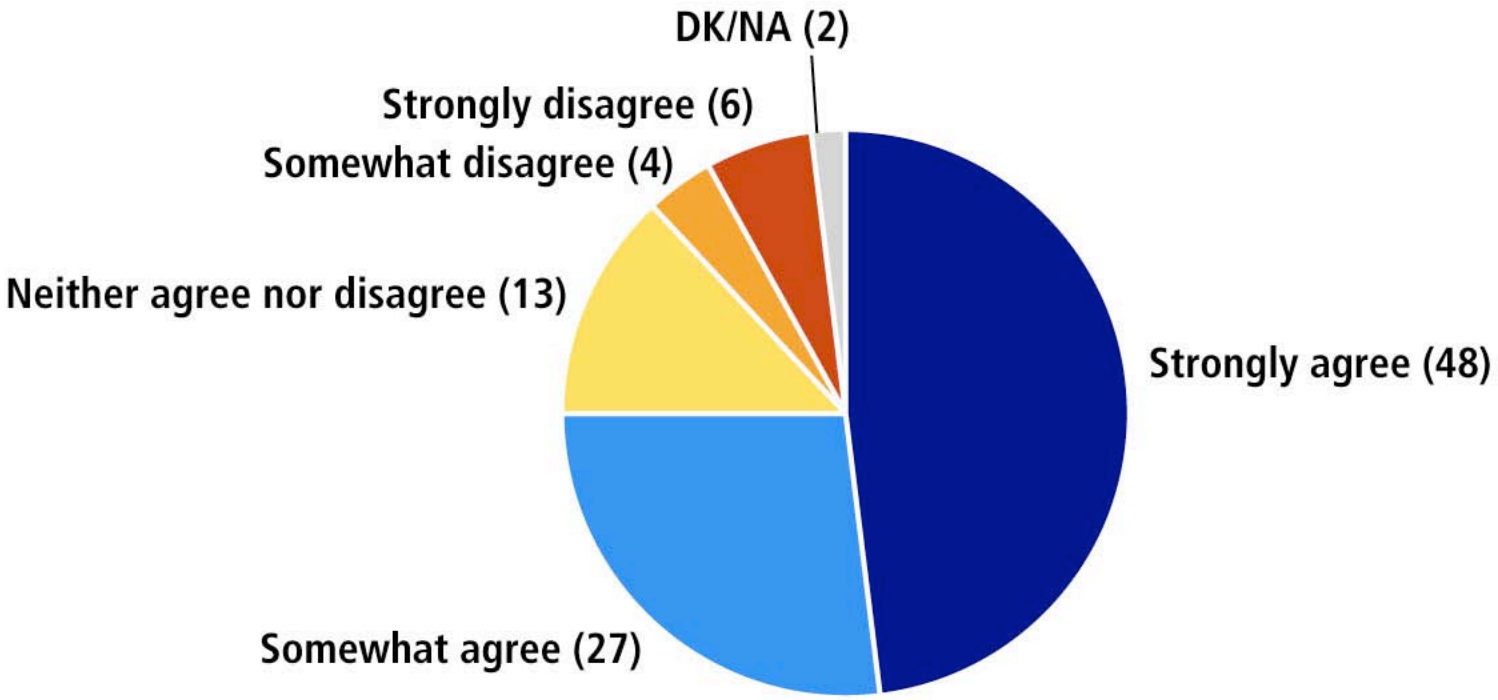
c. The current economic crisis will significantly delay or compromise the achievement of effective climate change agreements.

GLOBESCAN

Equitable Economic Development and Significant Progress in Combating Climate Change Can Be Achieved Simultaneously

CLIMATE DECISION MAKERS SURVEY

2008



CDMS08_q21e

21. Please indicate to what extent you agree or disagree with each of the following statements:

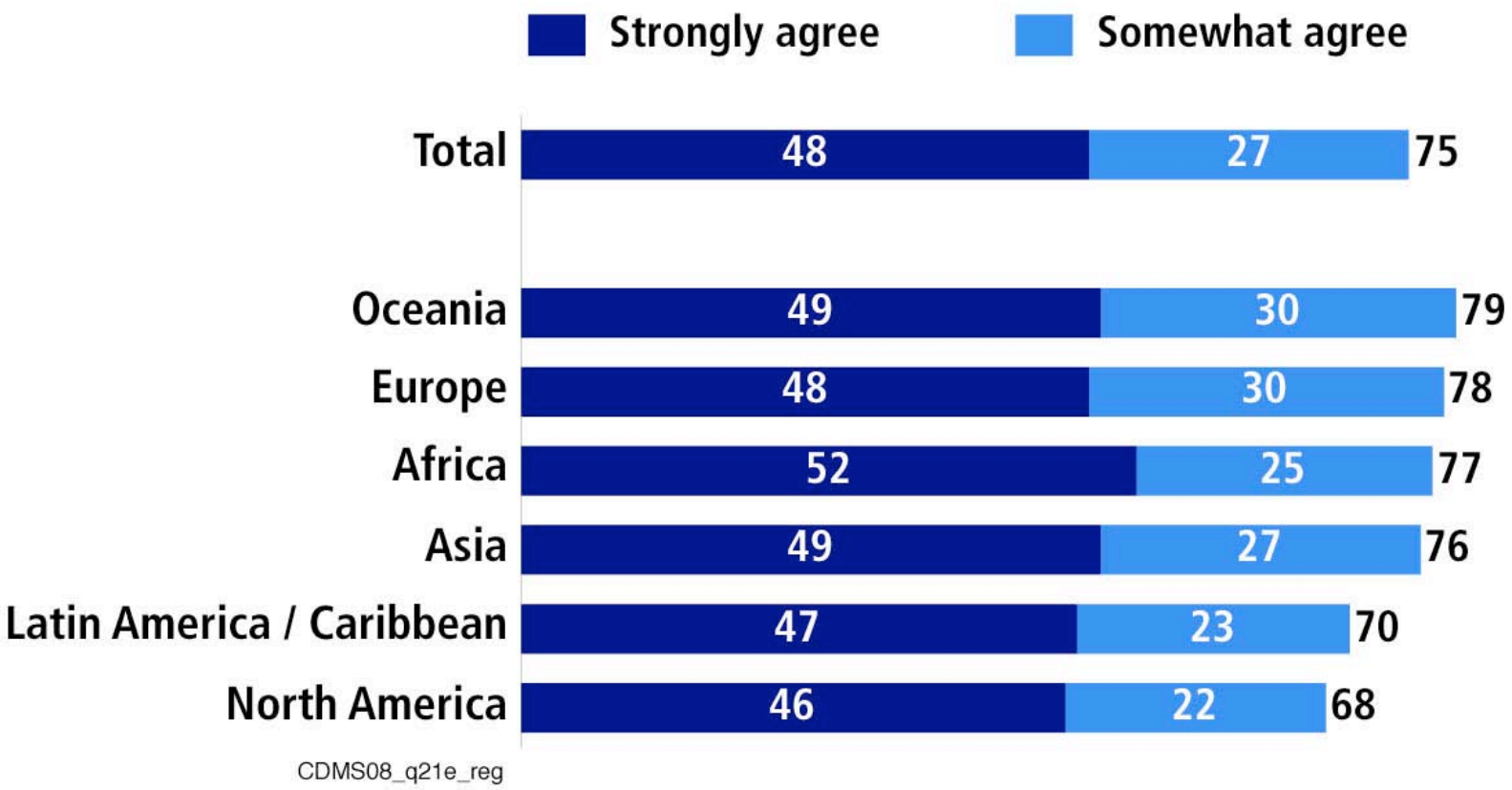
e. Equitable economic development and significant progress in combating climate change can be achieved at the same time.

GLOBESCAN

Equitable Economic Development and Significant Progress in Combating Climate Change Can Be Achieved Simultaneously

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



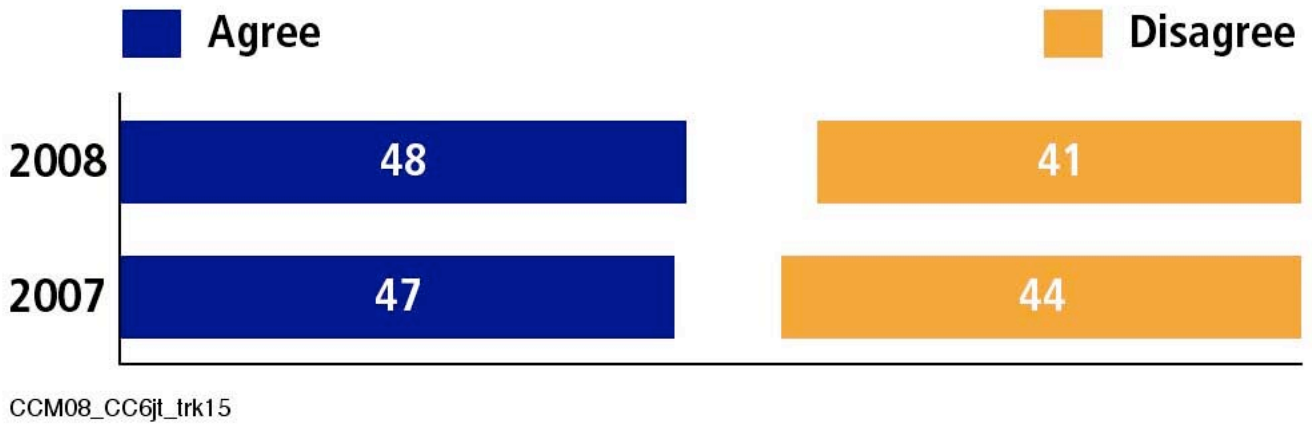
21. Please indicate to what extent you agree or disagree with each of the following statements:

e. Equitable economic development and significant progress in combating climate change can be achieved at the same time.

GLOBESCAN

National Economy Will Be Damaged If Climate Changing Emissions Reduced

Average of 15 Tracking Countries, 2007–2008



CCM08_CC6jt_trk15

The white space in this chart represents “Depends / Neither agree nor disagree” and “DK/NA.”

CC6. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

The Price of Carbon

CLIMATE DECISION MAKERS SURVEY

The price of carbon should increase threefold in order for climate-friendly decisions to be made

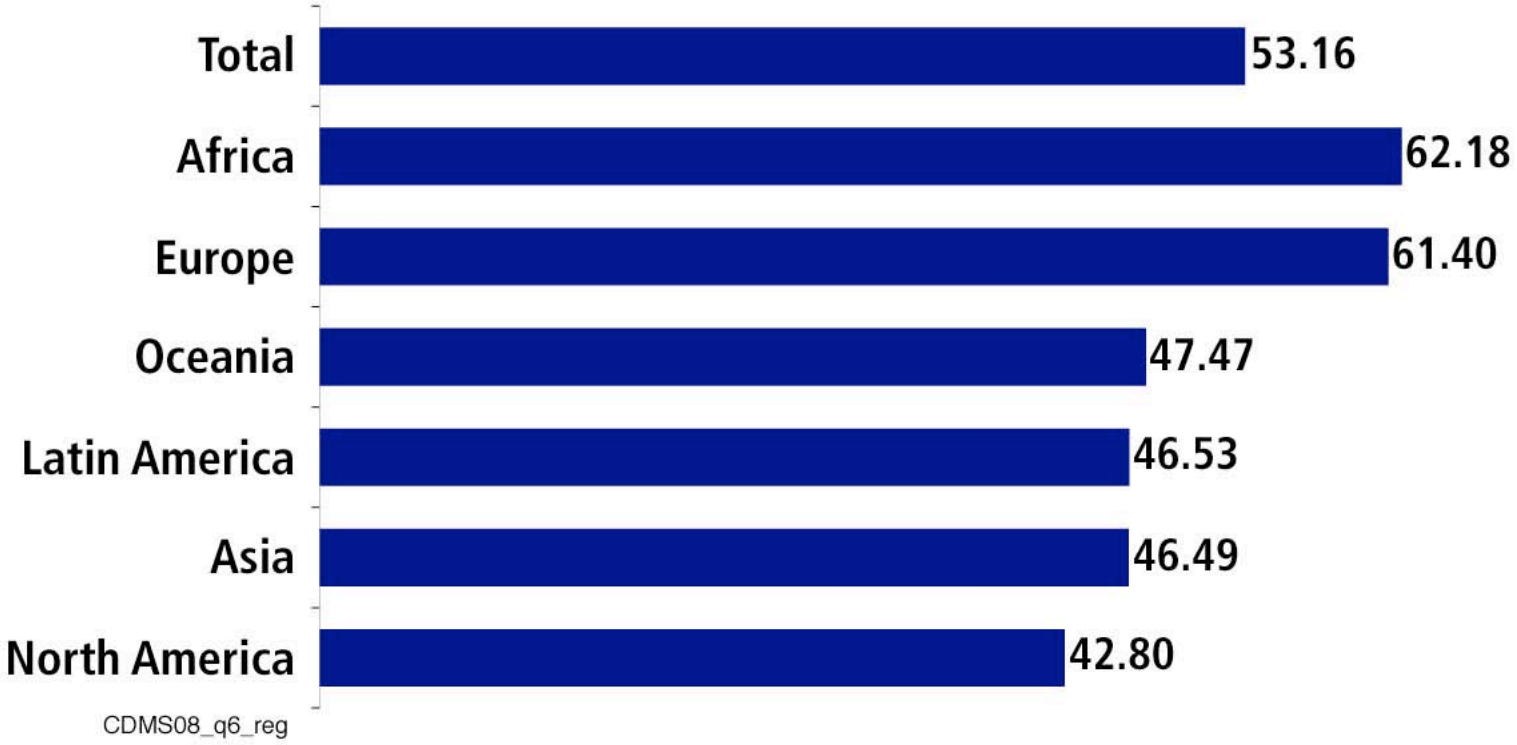
- As many as 6 percent of respondents point to the low cost of carbon as reasons for making less-climate friendly decisions. At the time the survey was fielded, the cost of carbon was €15 or $19 USD per tonne. According to respondents this figure will have to nearly triple to $53 USD for more climate-friendly decisions to be made within their organization.
- In fact, removing subsidies that promote high-carbon activities is one of the top-rated factors decision makers see as a high priority over the next two years.
- Public policy development and carbon taxing are also seen as key factors requiring attention.

GLOBESCAN

Price of Carbon at Which Majority of Decisions within Organization Will Become Climate-Friendly

CLIMATE DECISION MAKERS SURVEY

Mean US Dollars,* by Region, 2008



*All currency is in US Dollars. Responses in Euros have converted to US Dollars

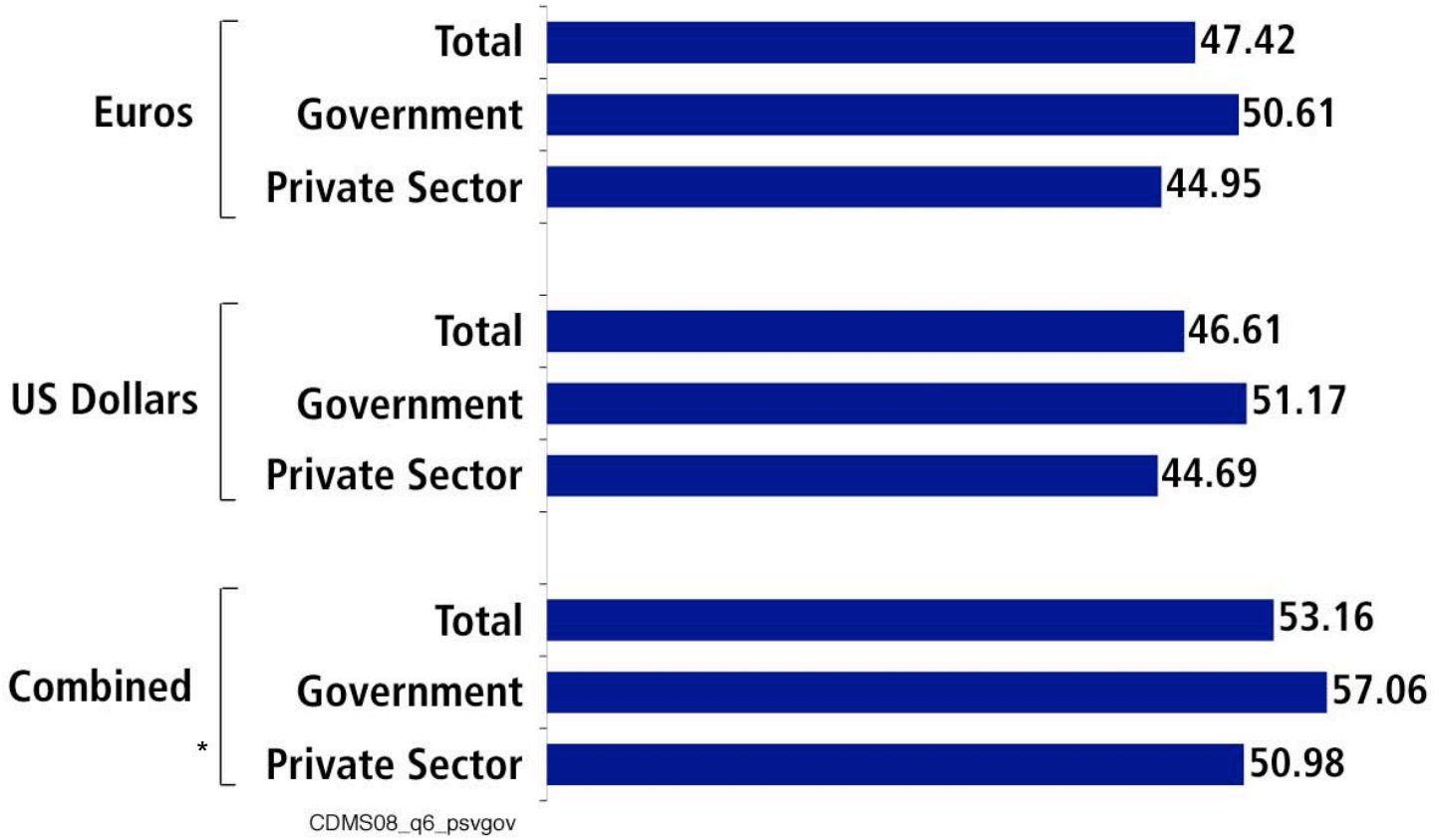
6. At what price of carbon do you think a majority of the decisions made within organizations like the one you are primarily associated with would become climate friendly?

GLOBESCAN

Price of Carbon at Which Majority of Decisions within Organization Will Become Climate-Friendly

CLIMATE DECISION MAKERS SURVEY

Mean US Dollars and Mean Euros, Private Sector vs Government



*Combined currency is in US Dollars. Responses in Euros have converted to US Dollars

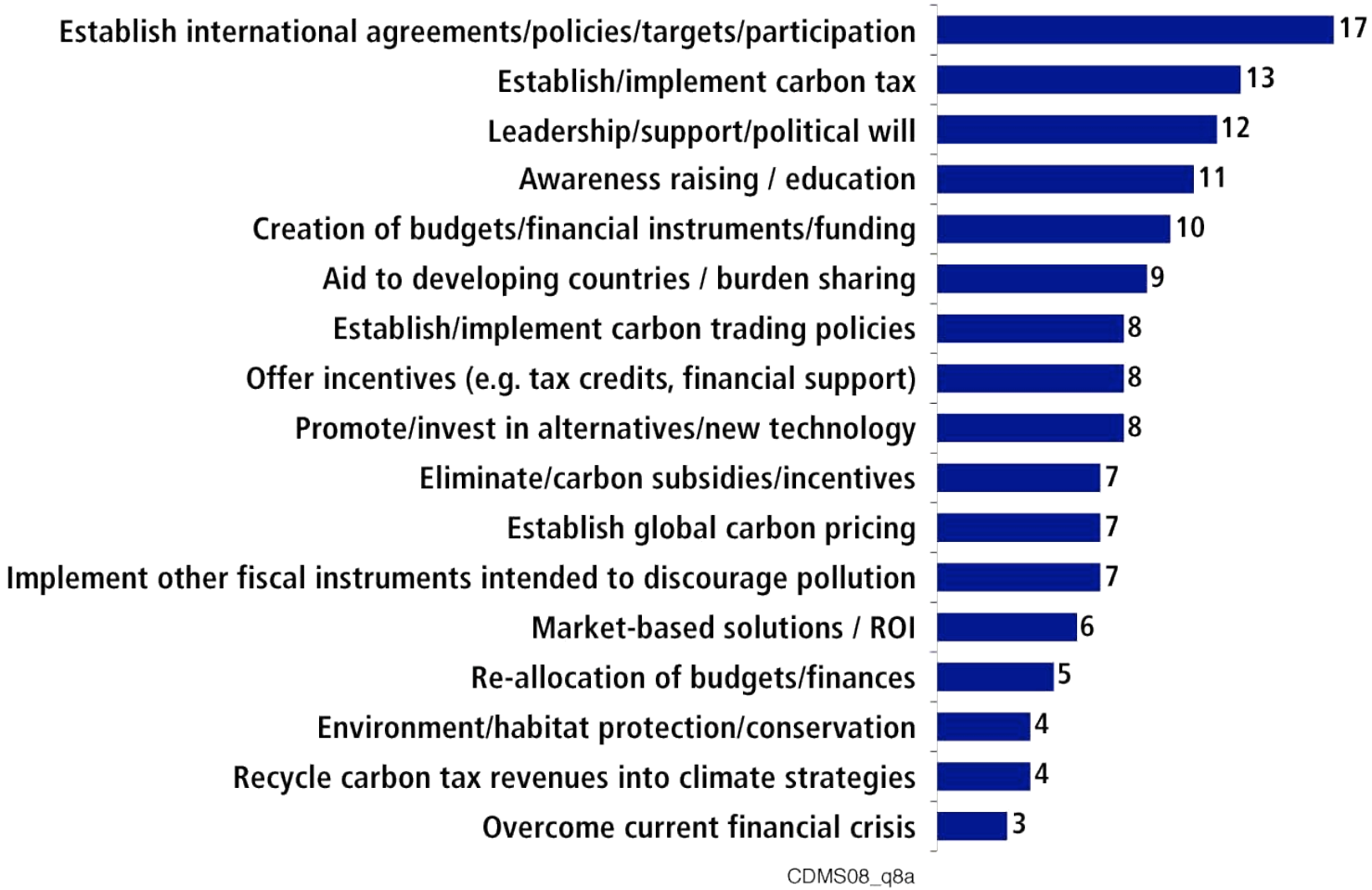
6. At what price of carbon do you think a majority of the decisions made within organizations like the one you are primarily associated with would become climate friendly?

GLOBESCAN

Priorities for Unlocking Financing for Climate Solutions

CLIMATE DECISION MAKERS SURVEY

Unprompted, Combined Mentions, 2008



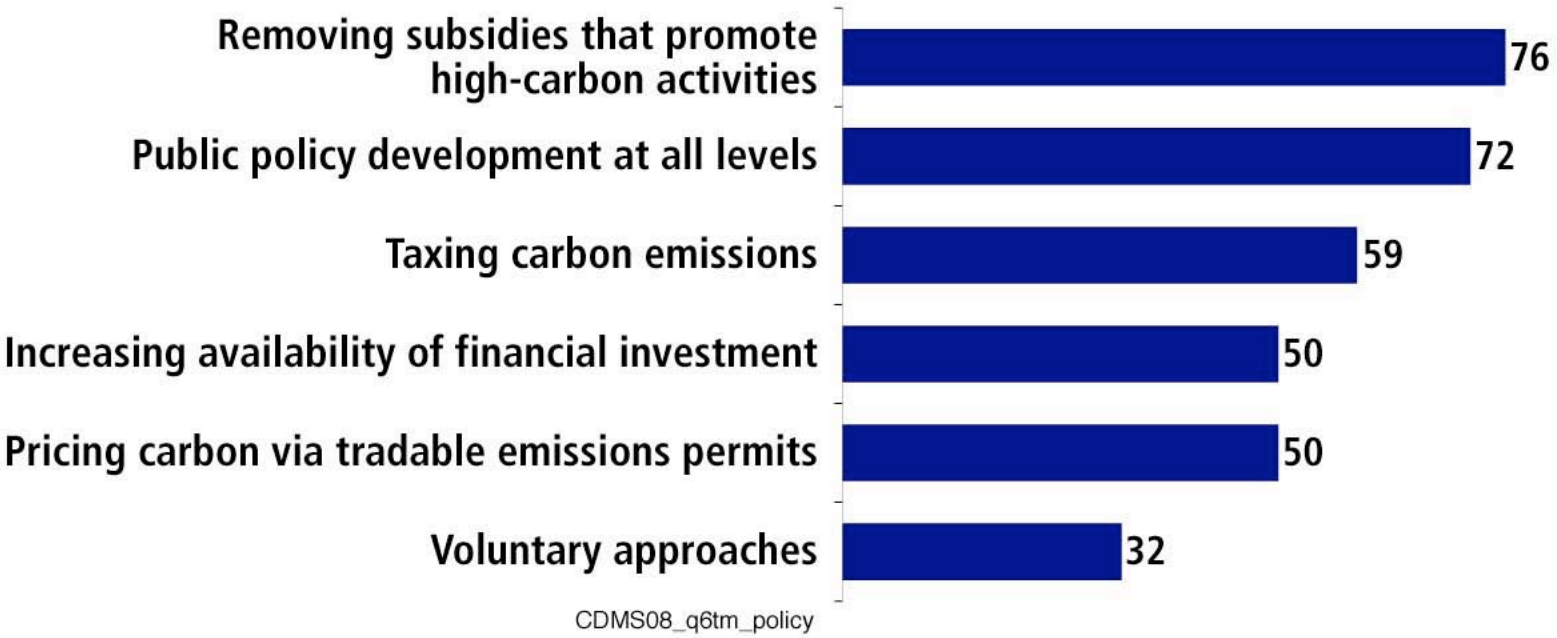
8a. What actions do you think need to be the biggest priorities in order to unlock the financing that is required to put in place climate adaptation and mitigation solutions at the scale that you think is required?

GLOBESCAN

Prioritizing Factors Contributing to Climate Change Solutions – Policy

CLIMATE DECISION MAKERS SURVEY

"High Priority (4+5)" Over Next Two Years, 2008



6tm. Many different things can contribute to climate solutions. For each of the following, please indicate how significant a priority you think it should be given over the next two years in order to advance appropriate climate solutions (including mitigation and adaptation).

GLOBESCAN

Organizational Decision Making

Organizational Decision Making

CLIMATE DECISION MAKERS SURVEY

International policies and agreements are required to free up climate budgets

- In the organizations where the survey participants work, one-third to two-fifths of decisions with direct implications for greenhouse gas (GHG) emissions are made using solutions that are not climate-friendly, even though climate-friendly options exist. The numbers are slightly less climate friendly in government than in private sector organizations.
- While climate decision makers and the general public agree that climate change can be addressed even in time of economic uncertainty, decision makers largely blame cost constraints as the main reason why less-climate friendly solutions are decided on. In this same basket, inadequate policies and lack of climate-friendly options are also noted as reasons for using less climate-friendly solutions.
- While lack of budget is given as the reason why climate-friendly decisions are not made within organizations, increasing the availability of financial investment is considered a less-urgent priority in advancing climate solutions. Instead, decision makers indicate that international agreements, policies, targets, and participation are needed to unlock the financing needed for climate solutions. Leadership and political willingness are also top priorities for unlocking financing for climate solutions.

GLOBESCAN

Percentage of Decisions Made within Organization Favoring Less Climate-Friendly Solutions Over Alternatives

CLIMATE DECISION MAKERS SURVEY

Mean Percentage, Private Sector vs Government

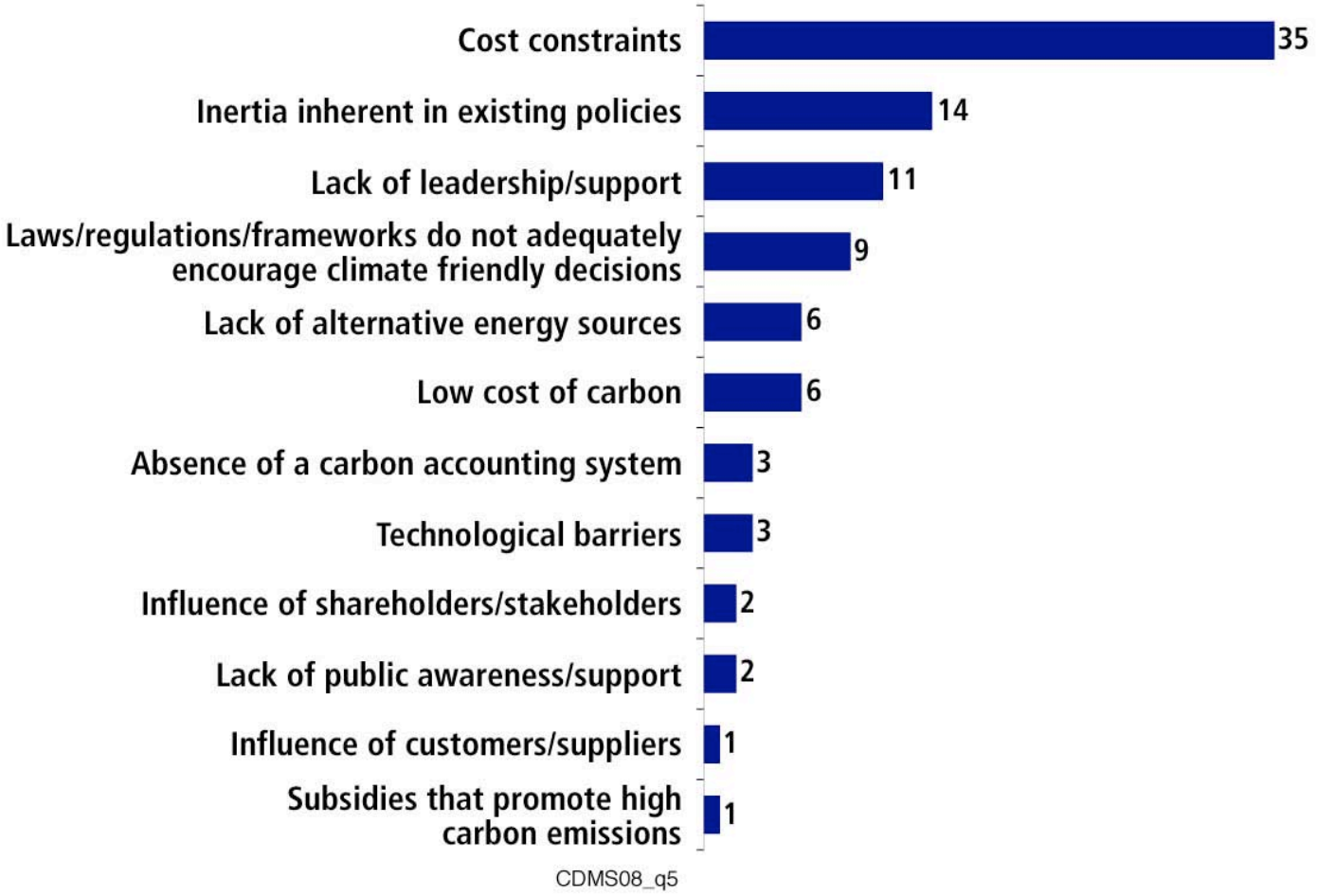
4. (New) Within the organization you are primarily associated with, what percentage of decisions that have significant implications for greenhouse gas emissions are made using less climate-friendly solutions when more climate friendly options exist?

GLOBESCAN

Reasons Why Less Climate Friendly Decisions are Made within Organization

CLIMATE DECISION MAKERS SURVEY

Unprompted, Combined Mentions, 2008



5. What are the two most important reasons that less climate friendly decisions are made when more climate friendly options exist within the organization you are primarily associated with?

GLOBESCAN

Adaptation and Mitigation

Adaptation and Mitigation

CLIMATE DECISION MAKERS SURVEY

Emphasize national climate budgets on mitigation over adaptation

- Global society's response to climate change, through both mitigation and adaptation, is largely rated as poor. Similar to 2007, progress on adaptive measures is rated as poor by three-quarters of respondents, with the same proportion rating mitigation progress as poor, actually worsening from 2007.
- While preliminary frameworks, such as GLOBE's Tokyo Framework, call for equal emphasis on adaptation and mitigation, decision makers would rather their country's climate change budgets to be split nearly 60:40, with stronger focus on mitigating climate change. However, those in developed regions tend to place more emphasis on mitigating climate change, whereas those from developing regions tend to prefer focus more on adaptive measures

GLOBESCAN

Adaptation and Mitigation

CLIMATE DECISION MAKERS SURVEY

Decision makers predict their organizations will focus most of their climate change efforts on energy demand management and efficiency gains.

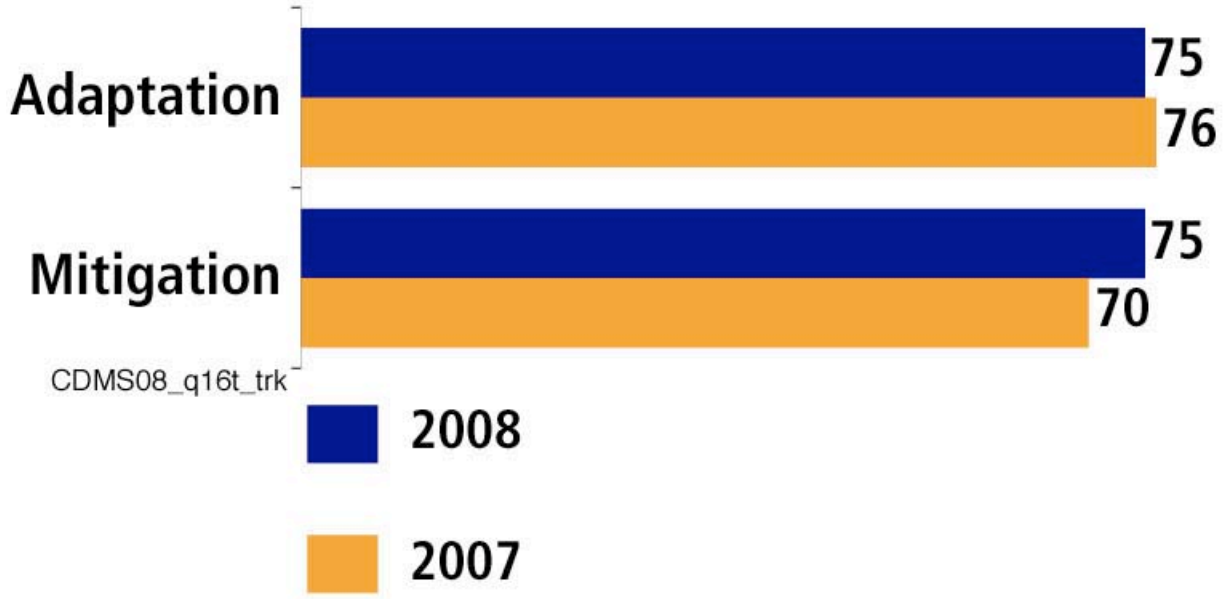
- Of their organization's own climate mitigation efforts, respondents predict that half of the efforts will be in the area of energy demand management and efficiency. Specifically regarding improved demand management in their organization, one-third of solution providers believe that conservation practices through workplace improvements are the most important actionable area. Advocacy and promoting awareness, and reduced business travel are named as the next most important actions to improve energy efficiency.
- After energy efficiency and demand management, the remaining proportion of mitigation efforts within respondents' organizations is split between lower-carbon energy sources (36%) and carbon capture (14%).

GLOBESCAN

Progress on Global Society's Response to Climate Change

CLIMATE DECISION MAKERS SURVEY

"Poor (1+2)," 2007–2008



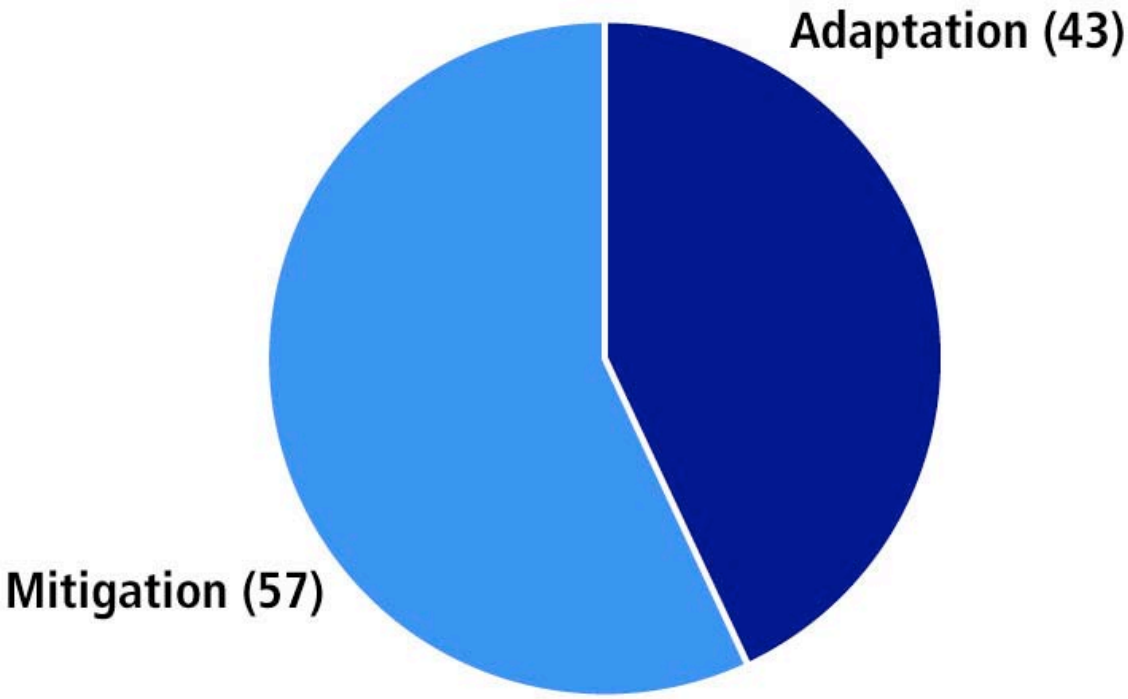
16t. Thinking of the past year, how do you rate progress on global society's response to climate change?

GLOBESCAN

Preferred Allocation of Country's Climate Change Budget

CLIMATE DECISION MAKERS SURVEY

Mean Percentages, Mitigation vs Adaptation, 2008



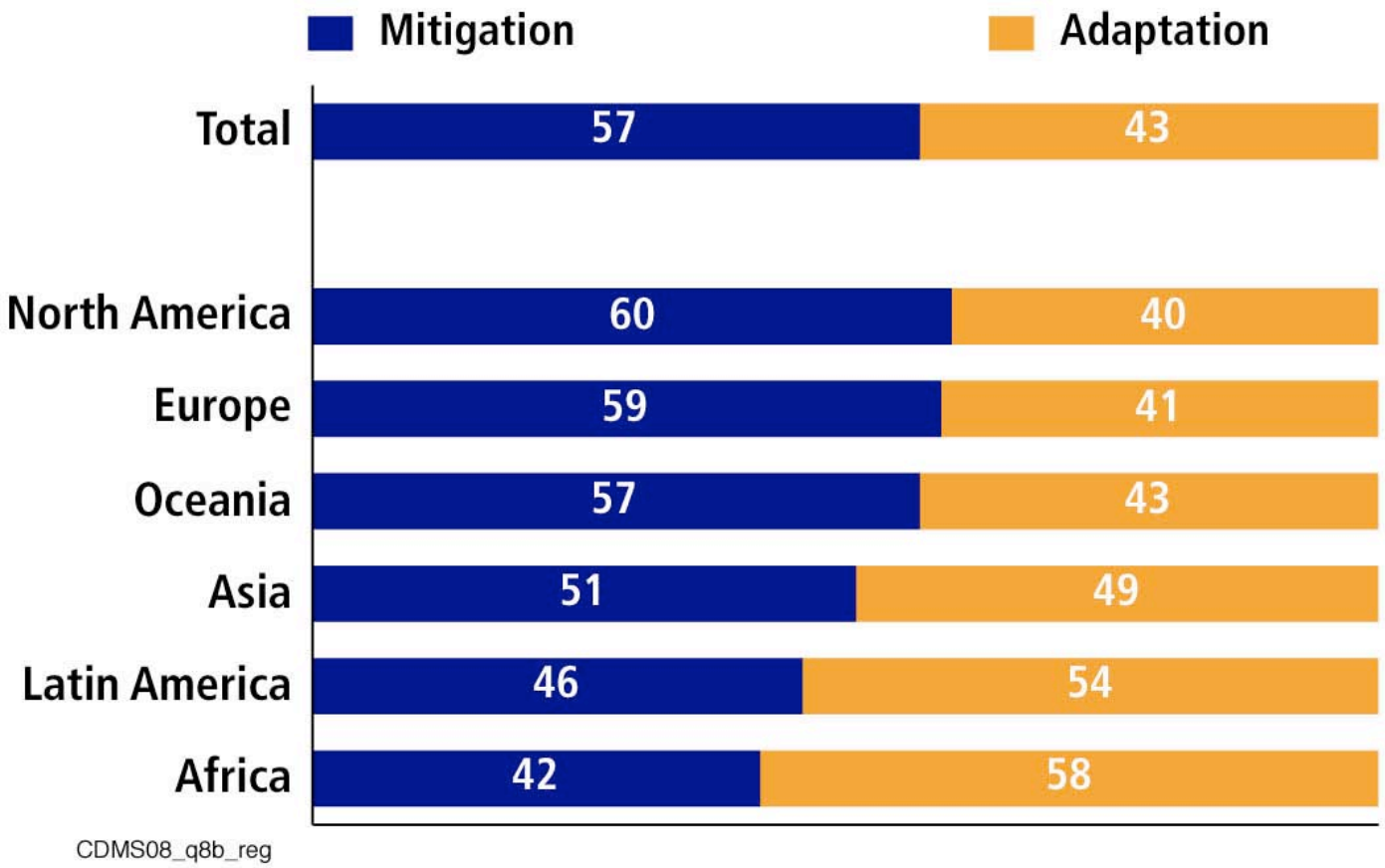
CDMS08_q8b

GLOBESCAN

Allocation of National Climate Change Budget

CLIMATE DECISION MAKERS SURVEY

Mean Percentages, 2008



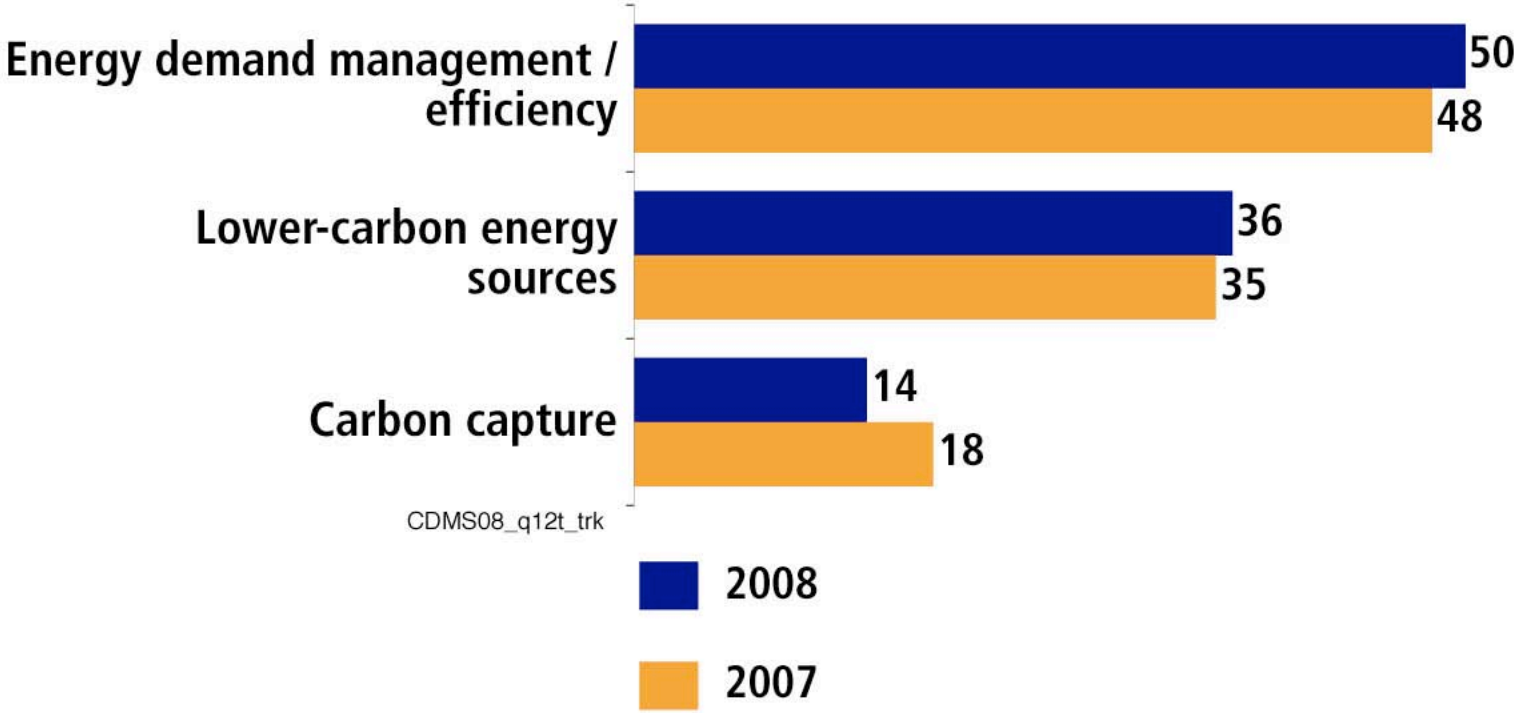
8b. What proportion of your country's climate change budget do you think should be used for adaptation and mitigation initiatives respectively?

GLOBESCAN

Predicted Distribution of Efforts across Climate Change Mitigation Approaches

CLIMATE DECISION MAKERS SURVEY

Mean Percentages, Over Next Ten Years, 2007–2008



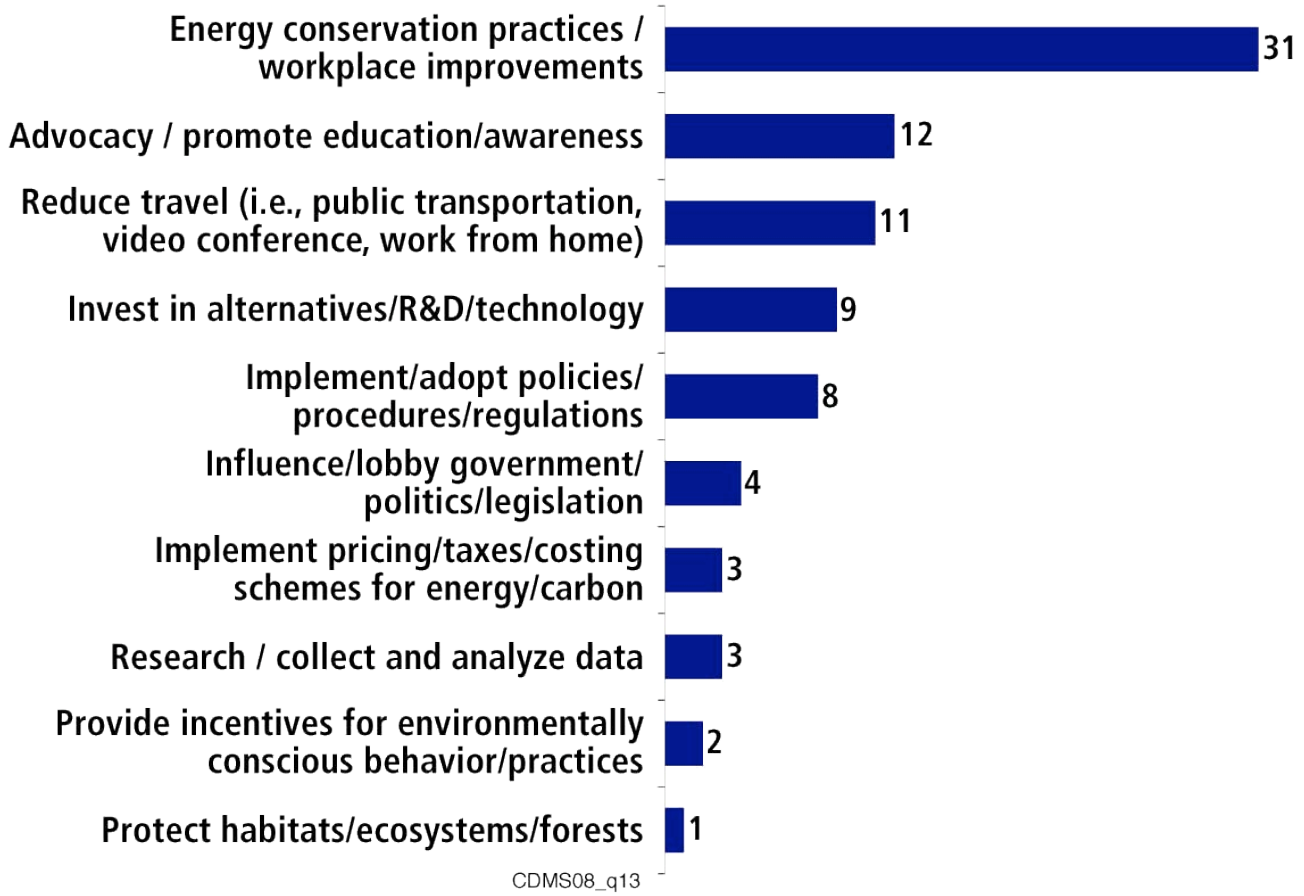
12t. Over the next ten years in your organization or sector, what percentage contribution do you expect from each of the following overall approaches for reducing the levels of climate changing gases in the atmosphere?

GLOBESCAN

Most Important Action to Improve Energy Efficiency and Demand Management

CLIMATE DECISION MAKERS SURVEY

Unprompted, 2008



13. (New) What is the single most effective thing you and the organization you are primarily associated with could do over the next three years to improve energy efficiency and demand management?

GLOBESCAN

Focus on Energy Efficiency

CLIMATE DECISION MAKERS SURVEY

Energy efficiency is the "low-hanging fruit"

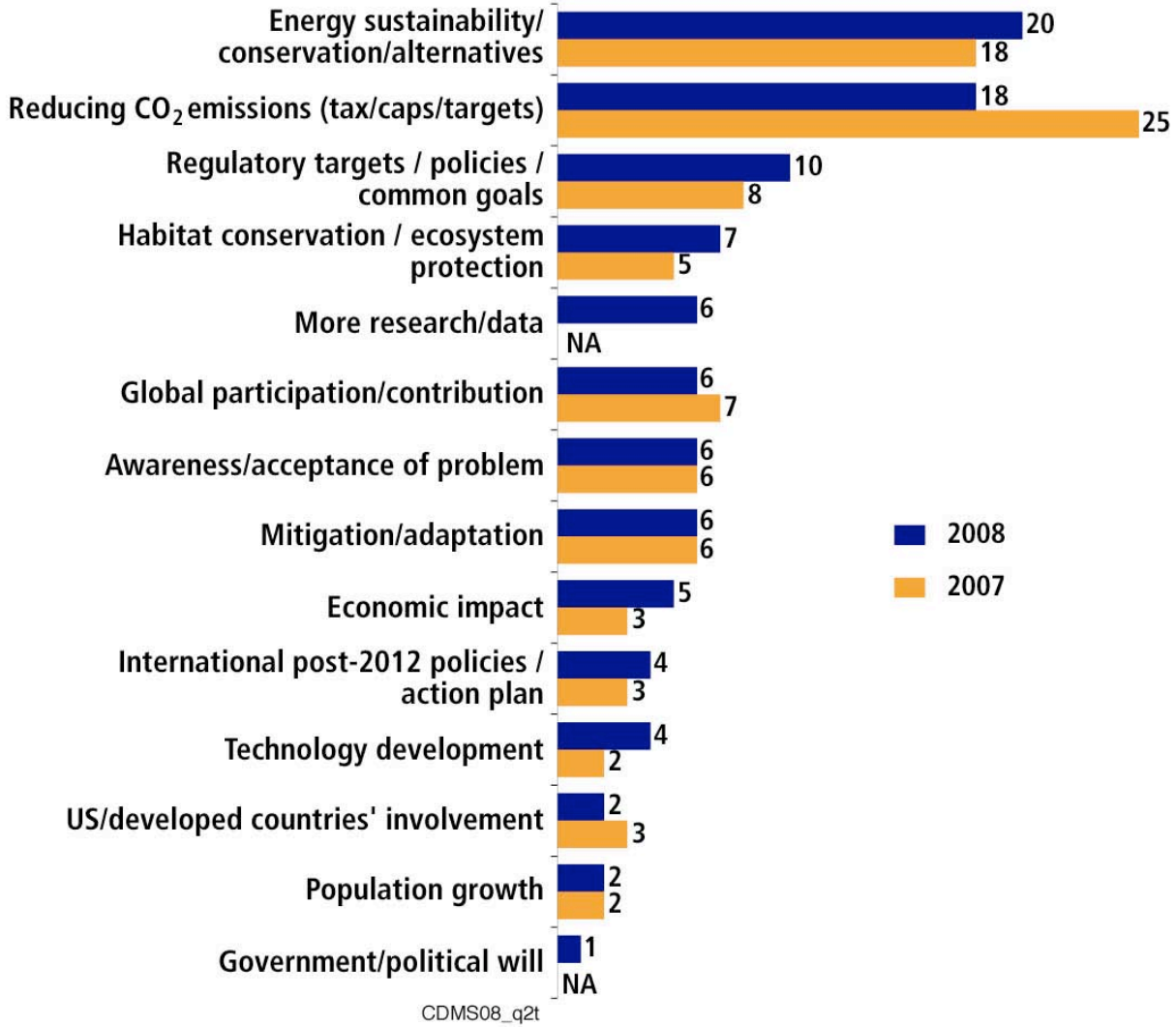
- While the world waits for an international agreement on the next steps to address climate change, solution providers believe that energy efficiency and conservation is the "low-hanging fruit." Energy sustainability and conservation stand out among climate decision makers, ahead of reducing CO_2 emissions through taxes, caps, and targets, as requiring the most urgent consensus in the realm of climate solutions and negotiations. Decision makers have been most successful at addressing climate change by improving energy efficiency and conservation practices within their organizations.
- That said, nearly eight in ten respondents rate focusing on available energy efficiency gains as high priority over the next two years, at the top of a list of 17 factors that impact climate change solutions. Similarly, three-quarters think advancing research and development of new technology is a key priority over the next couple of years.

GLOBESCAN

Subjects Requiring Urgent Consensus to Advance Climate Change Solutions

CLIMATE DECISION MAKERS SURVEY

Unprompted, 2007–2008



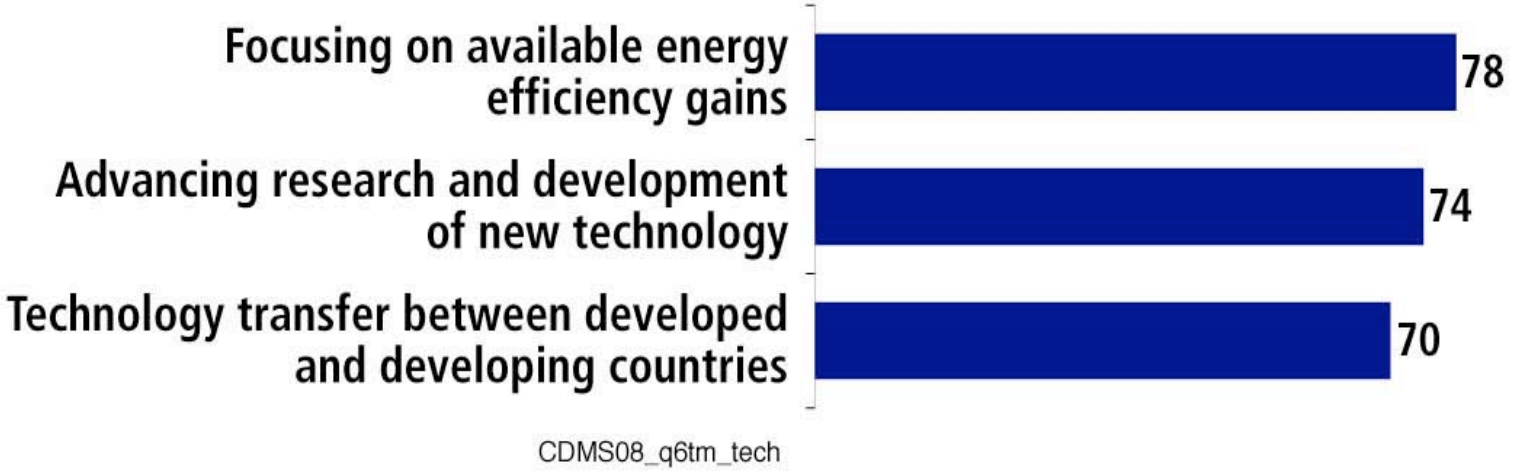
2t. What major area or topic is in the most urgent need of consensus or agreement today in order to advance climate solutions overall?

GLOBESCAN

Prioritizing Factors Contributing to Climate Change Solutions – Technology

CLIMATE DECISION MAKERS SURVEY

"High Priority (4+5)" Over Next Two Years, 2008



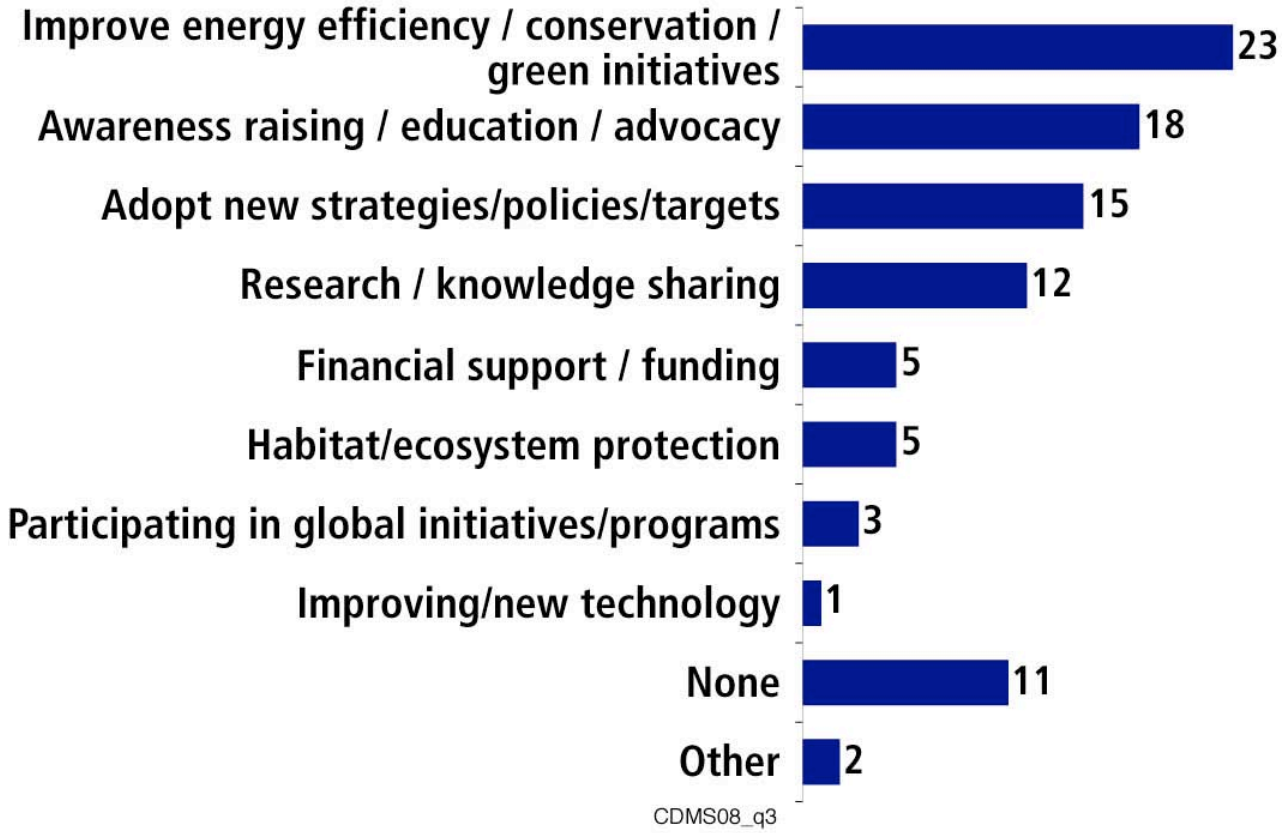
6tm. Many different things can contribute to climate solutions. For each of the following, please indicate how significant a priority you think it should be given over the next two years in order to advance appropriate climate solutions (including mitigation and adaptation).

GLOBESCAN

Most Effective Actions Taken by Organization to Address Climate Change

CLIMATE DECISION MAKERS SURVEY

Unprompted, 2008



3. Please describe what you think has been the single most effective action that the organization you are primarily associated with has taken in the past five years to help mitigate or adapt to climate change.

GLOBESCAN

Most Effective Actions Taken by Organization to Address Climate Change

CLIMATE DECISION MAKERS SURVEY

Unprompted, by Sector, 2008

	Total	Institutional	Multilateral	Government	NGO	Private sector
Improve energy efficiency / conservation / green initiatives	23	19	11	23	17	33
Awareness raising / education / advocacy	18	17	25	17	25	11
Adopt new strategies/ policies/targets	15	9	21	23	18	13
Research / knowledge sharing	12	23	8	11	9	6
Financial support / funding	5	3	15	5	4	7
Habitat/ecosystem protection	5	3	6	5	14	3
Participating in global initiatives/programs	3	2	0	5	5	2
Improving/new technology	1	0	2	0	1	3
None	11	15	8	5	5	18

CDMS08_q3_tbl

Top action

3. Please describe what you think has been the single most effective action that the organization you are primarily associated with has taken in the past five years to help mitigate or adapt to climate change.

GLOBESCAN

Mitigation

CLIMATE DECISION MAKERS SURVEY

Decision makers call for a multi-dimensional approach to emissions reductions via energy conservation, renewables, CCS, and nuclear power, among others.

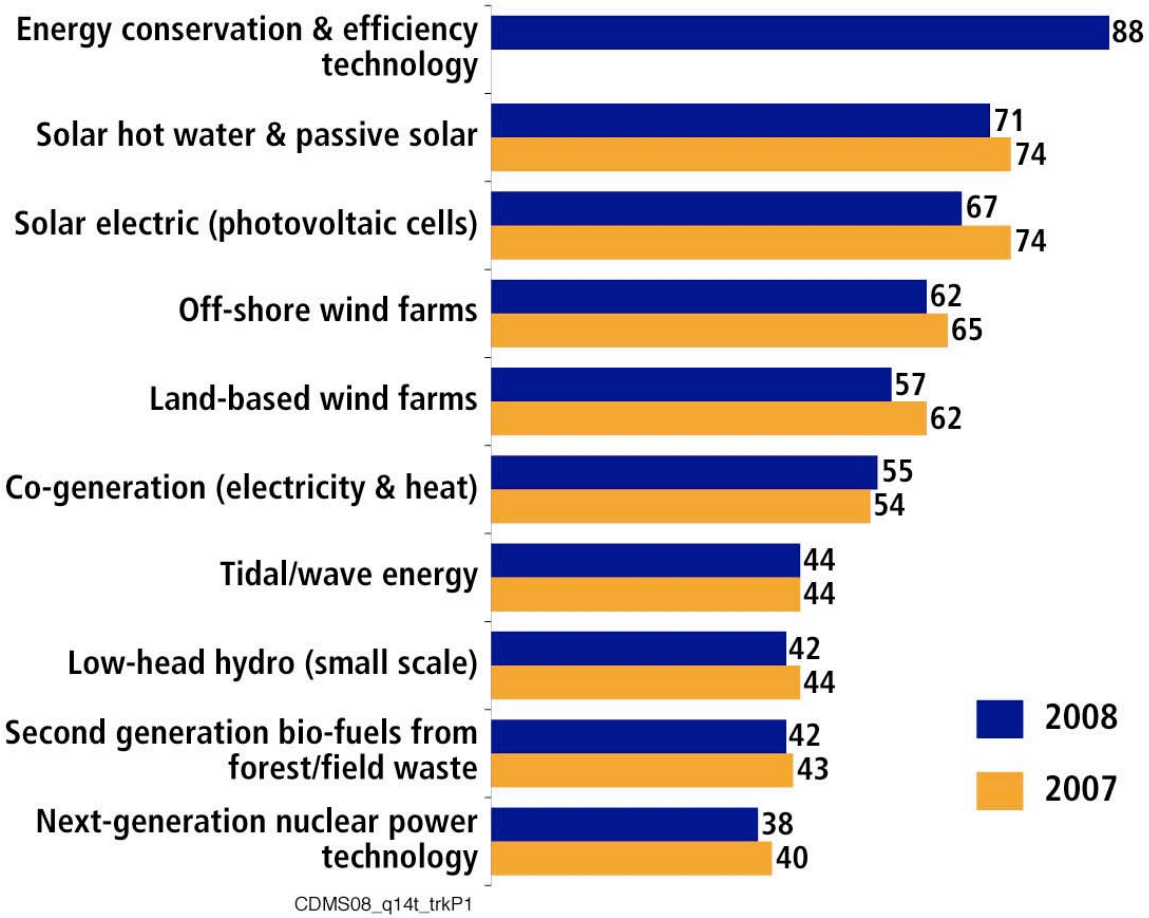
- Given a list of 20 energy technologies, respondents almost unanimously agree that energy conservation and efficiency technology has the greatest potential to lower atmospheric carbon levels over the next 25 years.
- Predicting that approximately one-third of their organizations' efforts will be directed toward lower-carbon energy sources, decision-makers expect solar and wind power to have the greatest potential to lower atmospheric carbon levels over the next 25 years. Echoing this, a GlobeScan study of adults in 23 countries determined that the general public significantly agrees that the world should depend a great deal on solar and wind energy going forward, and less on nuclear power, bio-fuels, and clean coal.
- Specifically regarding carbon capture and storage (CCS), about one-third of those surveyed think both new build and retrofitting existing coal plants will be successful over the next 25 years. Decision makers mainly fear that committing to CCS will discourage innovation and investment in other technologies and renewables; however, they believe it can be implemented on a broad scale without harming the economy. That said, a multi-dimensional approach including CCS, renewable energy, nuclear power, and energy conservation technologies will provide a practical and successful approach for mitigating climate change.

GLOBESCAN

Rating Energy Technologies' Potential to Lower Atmospheric Carbon Levels

CLIMATE DECISION MAKERS SURVEY

"High Potential (4+5)," Over Next 25 Years, 2007–2008 – Part 1



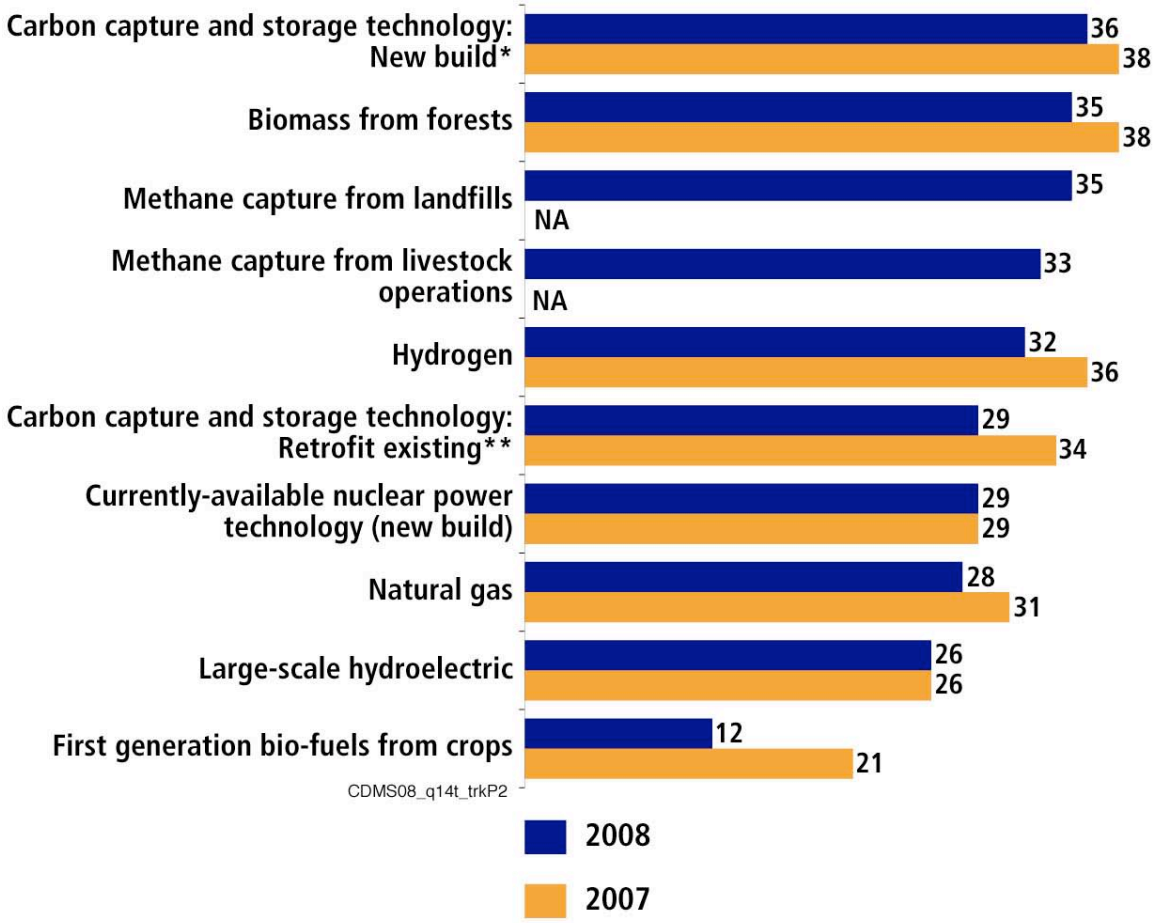
14.1t. Please rate each of the following energy technologies in terms of its potential role over the next 25 years in lowering overall carbon levels in the atmosphere without unacceptable side effects.

GLOBESCAN

Rating Energy Technologies' Potential to Lower Atmospheric Carbon Levels

CLIMATE DECISION MAKERS SURVEY

"High Potential (4+5)," Over Next 25 Years, 2007–2008 – Part 2



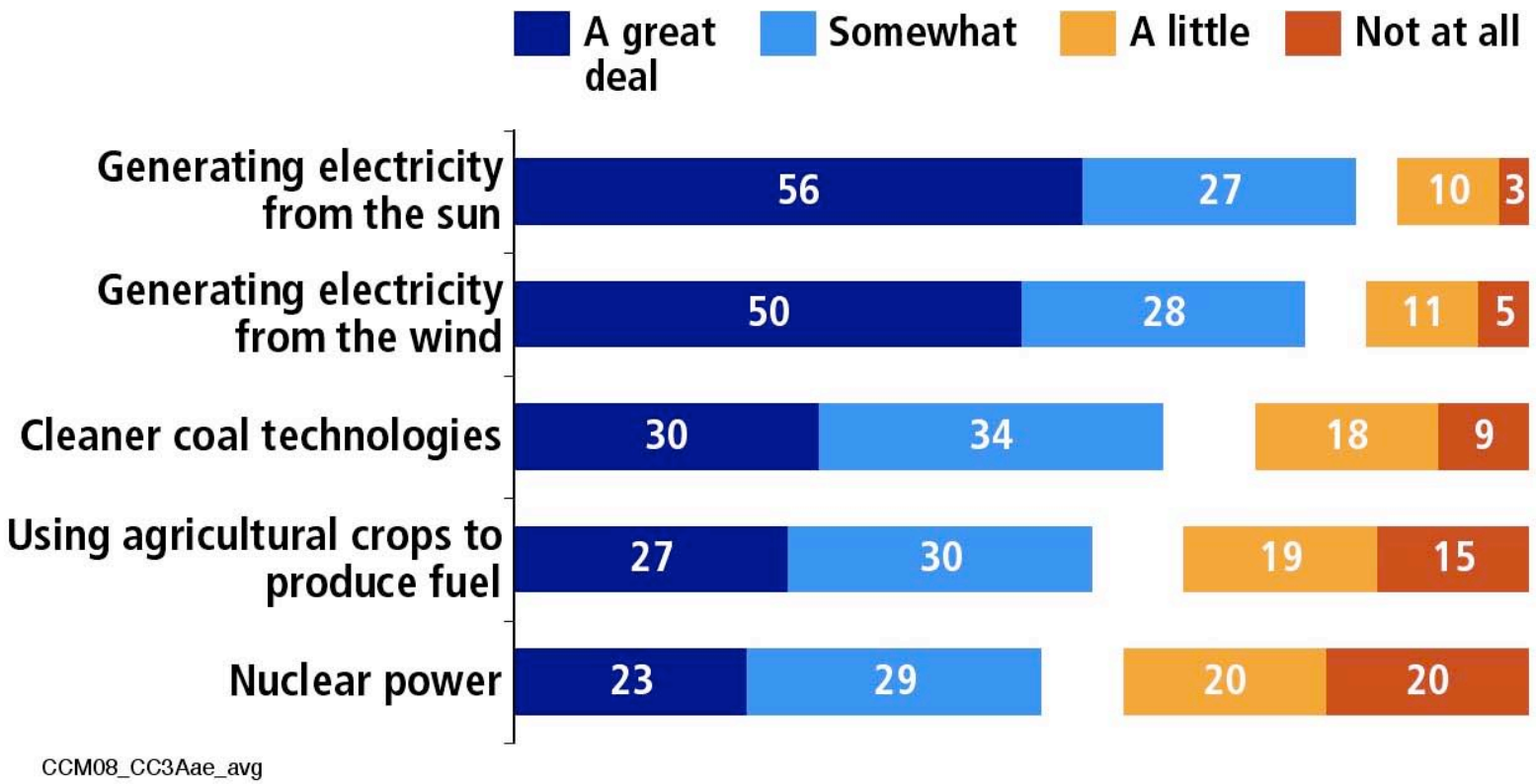
14.1t. Please rate each of the following energy technologies in terms of its potential role over the next 25 years in lowering overall carbon levels in the atmosphere without unacceptable side effects.

*New attribute wording. In 2007, wording was "Clean coal technology (new build)."
**New attribute wording. In 2007, wording was: Clean coal technology (retrofit of existing coal-fired power plants)."

GLOBESCAN

How Much We Should Depend on Various Energy Sources to Prevent Climate Change

Average of 22 Countries*



*Not asked in France and Poland
Asked of half of sample

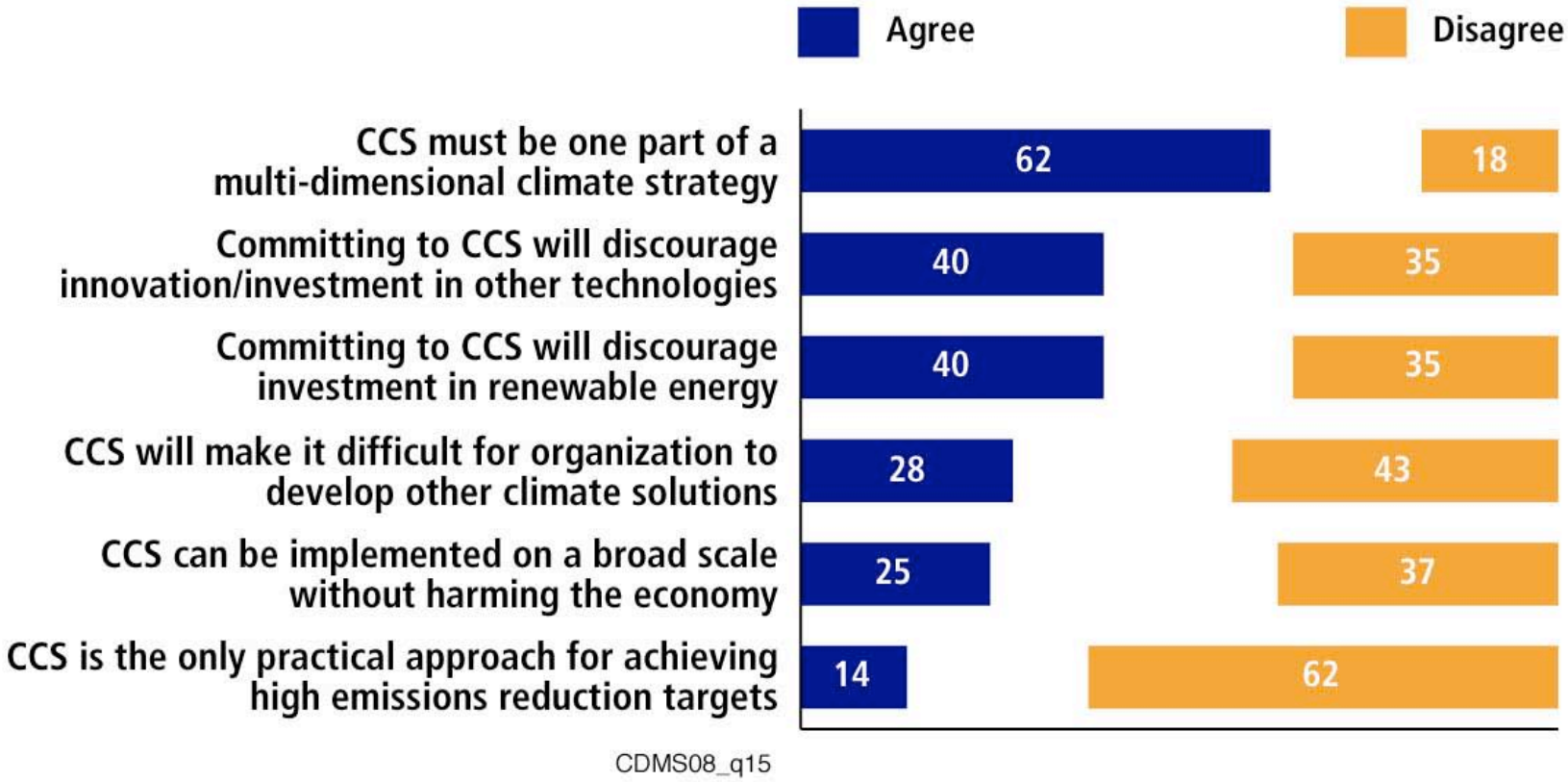
CC3A. Please tell me how much society should depend on each of the following in the future to produce energy to prevent climate change.

GLOBESCAN

Opinions on Carbon Capture and Storage (CCS)

CLIMATE DECISION MAKERS SURVEY

2008



15. In some jurisdictions, carbon capture and storage (CCS) may be a way to reduce greenhouse gas emissions from coal-fired power plants. Please indicate whether you agree or disagree with each of the following statements using a scale of 1 to 5 where 1 means "strongly disagree" and 5 means "strongly agree."

GLOBESCAN

Adaptation

CLIMATE DECISION MAKERS SURVEY

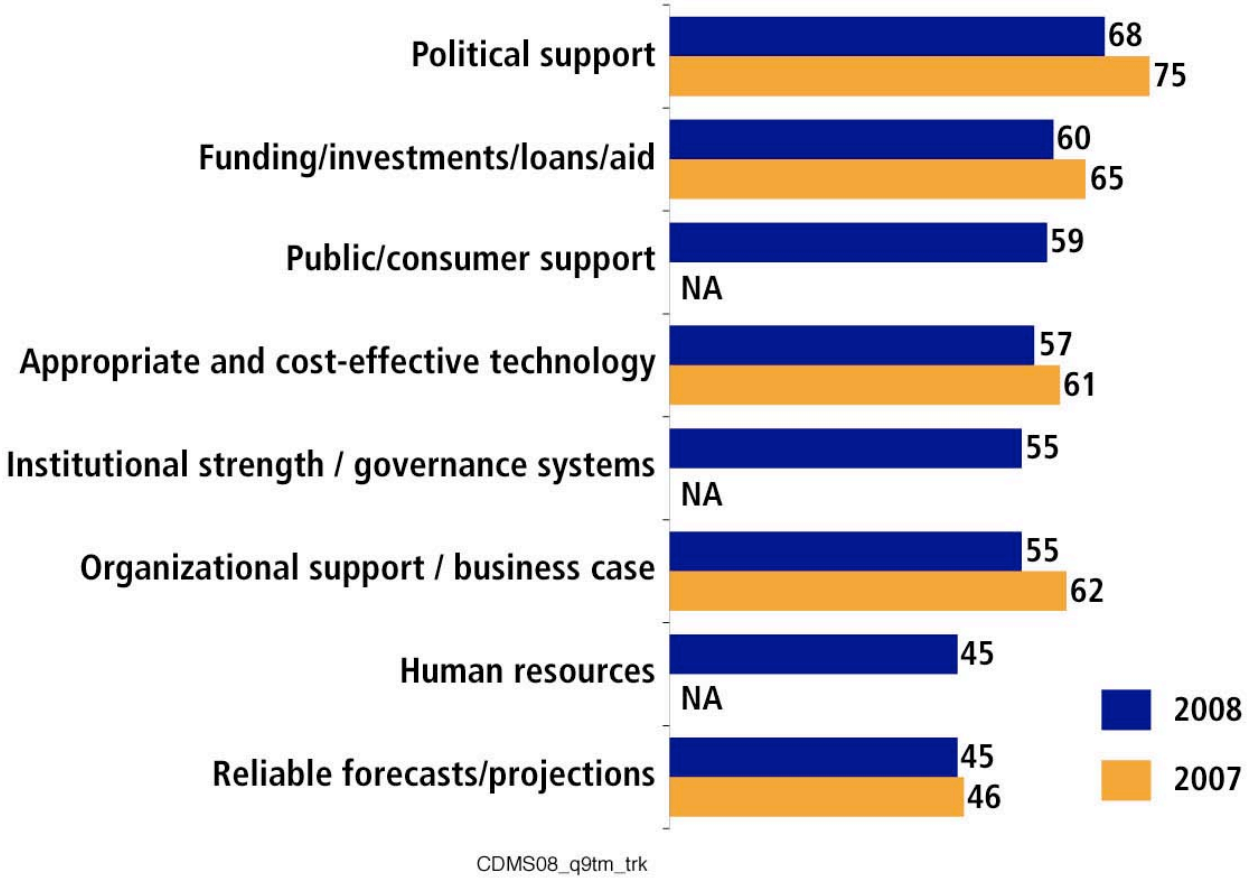
- Organizations need more support from government and politicians, as well as from consumers, and funding if they are to adequately implement adaptation strategies. However, municipal and state governments are especially regarded as ineffective in this area, with two-thirds of respondents rating them as ineffective at developing, communicating, or promoting climate change adaptation solutions. UN agencies, national governments, and the World Bank also receive more negative than positive ratings in this area.
- Scientists and academics, and NGOs are the only groups that are rated as effectively addressing climate adaptation solutions, though decision makers' confidence even in these institutions is modest. Echoing this, the general public in 21 countries think scientists and NGOs are doing their share of addressing climate change and rank scientists and NGOs ahead of international bodies like the World Bank, national governments, and companies (both global and local). As the climate debate intensifies and future strategies are developed, the results of both studies suggest that credibility and ability to perform lies with the scientific community and NGOs. Thus, the opinions of these groups should be considered in any future negotiations as they are the most trusted by climate change solution providers and the general public alike. This may be because practitioners believe that society's adaptation efforts are still largely in the research and development phase, rather than the implementation phase.

GLOBESCAN

Resources Required to Implement Climate Adaptation Strategies

CLIMATE DECISION MAKERS SURVEY

"More Required (4+5)," 2007–2008

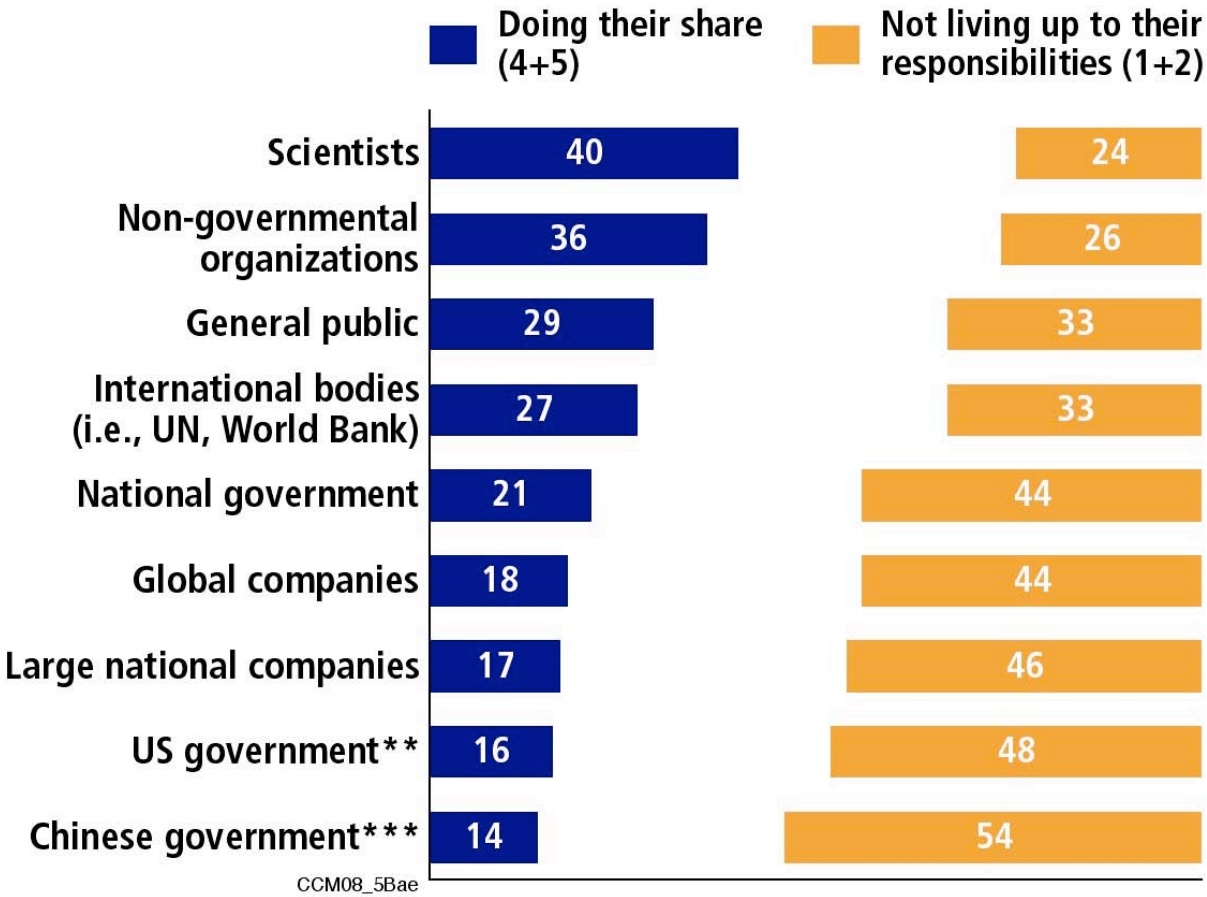


9tm. Please rate each of the following in terms of how much more of them you and your colleagues require in order to implement climate adaptation solutions (including policies, plans and investments).

GLOBESCAN

Performance Ratings on Addressing Climate Change

Average of 21 Countries*



*Not asked in Brazil, France, and Poland

**Average of 20 countries, not including United States

***Average of 20 countries, not including China

Asked of half of sample

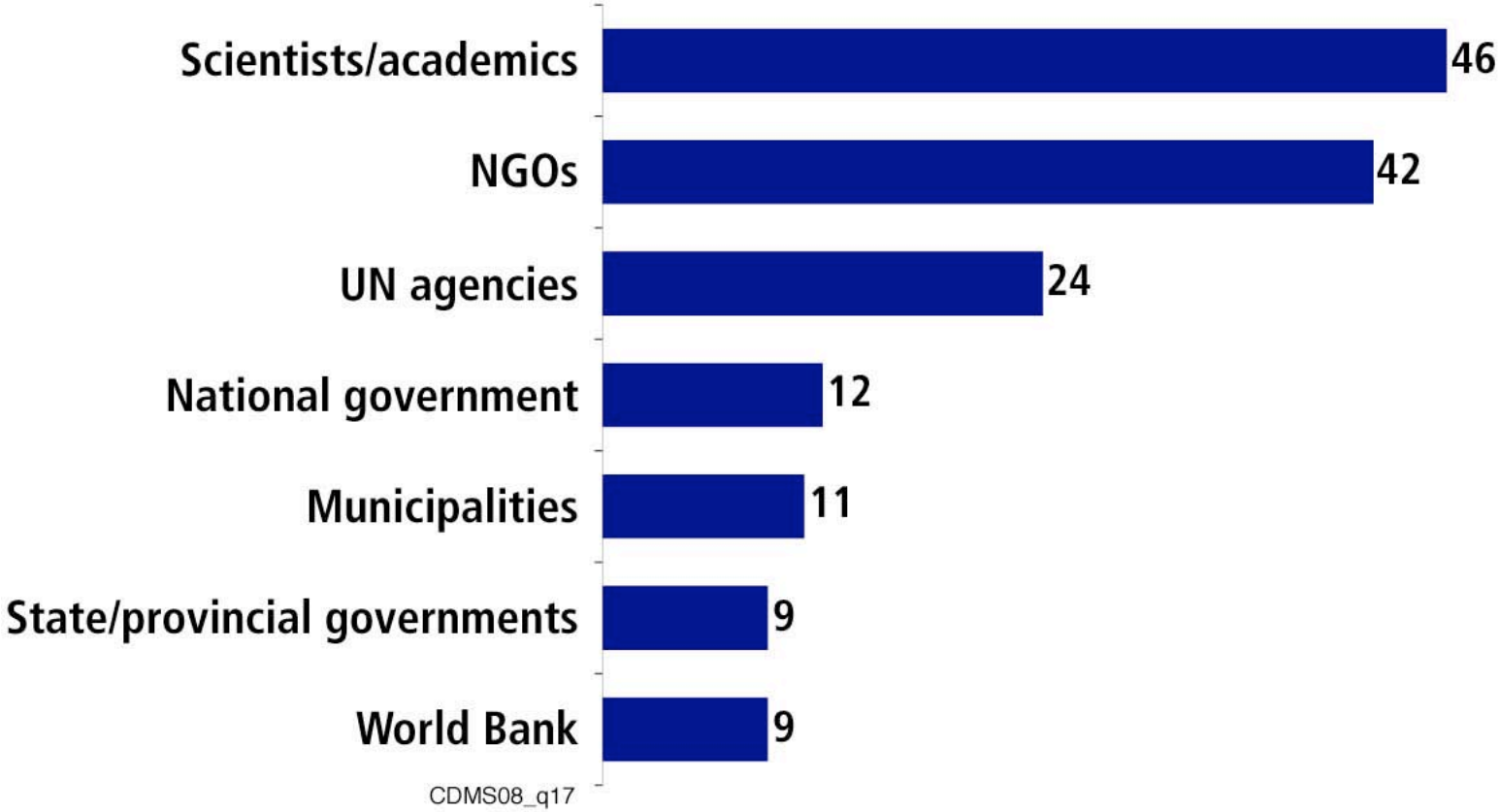
The white space in this chart represents "Neutral (3)" and "DK/NA."

CC5B. Please tell me whether you think each of the following is living up to their responsibilities to address the problem of climate change.

Organizational Performance in Developing, Communicating, or Promoting Climate Adaptation Solutions

CLIMATE DECISION MAKERS SURVEY

"Effective (4+5)," 2008



17t. Please rate the performance of the following organizations in developing, communicating or promoting climate change adaptation solutions. Please use a five-point scale where 1 is "very ineffective" and 5 is "very effective."

GLOBESCAN

Adaptation – Focus on Water, Food, and Health

CLIMATE DECISION MAKERS SURVEY

Climate impacts on water and food, both quality and security, are seen to require the most attention – especially in developing nations.

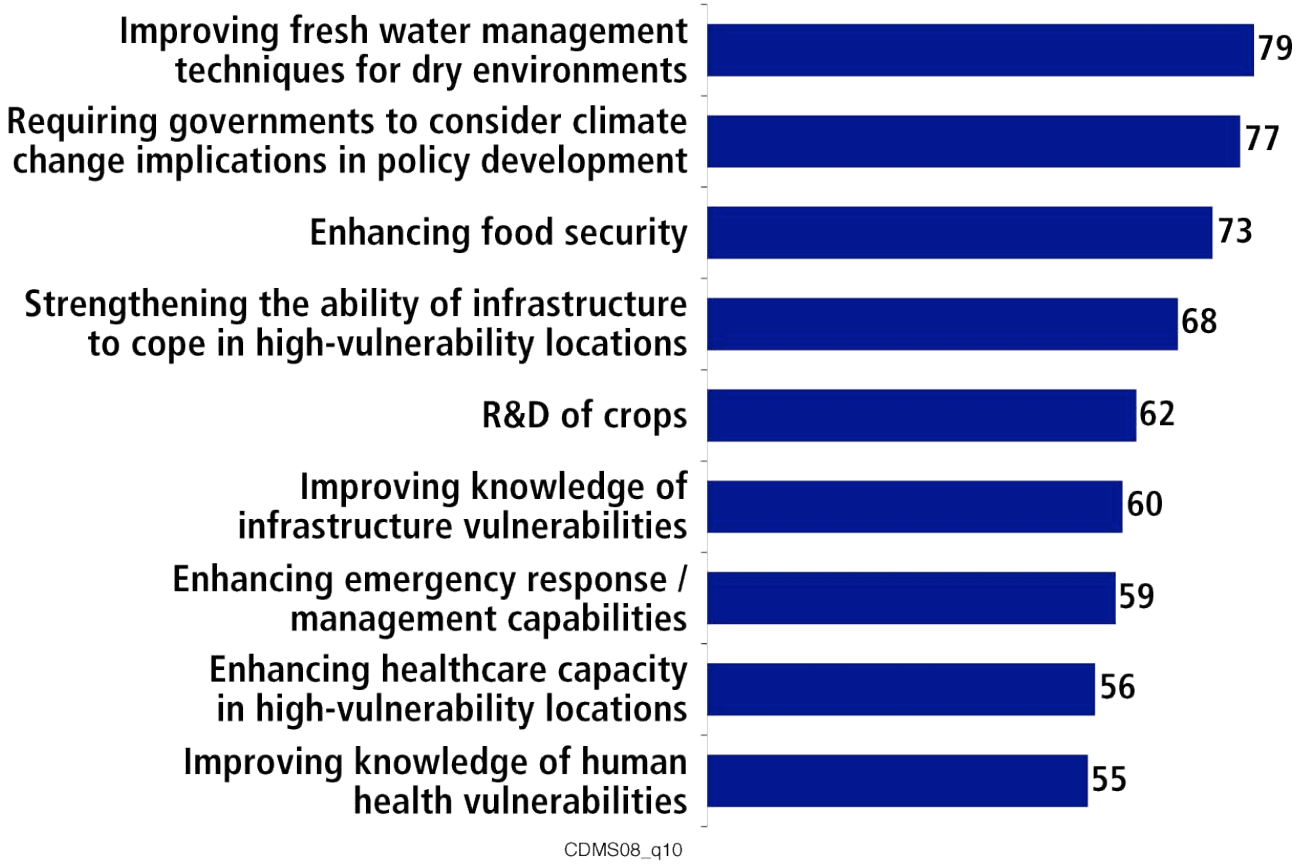
- The most important adaptation measure needed is improving fresh water management techniques for dry environments. In second place is requiring governments to consider climate change implications in policy development. But note that a wide range of measures are given a high priority by over half the survey participants, indicating that it is not a matter of selecting just one or two.
- In the context of impact on human health, the high priority given to water management is confirmed: water availability and quality is rated as the most important way in which human health may be affected, followed by the quality and security of food.
- Improving knowledge of human health vulnerabilities is given a lower priority than other adaptation measures at the global level. But respondents in developing regions, such as Africa and Asia, tend to consider it to be more important.
- People in developing regions are also more inclined than those in the developed world to think improving measures against the health effects of climate, such as food quality and security, extreme weather, and water availability and quality, are important.

GLOBESCAN

Priority of Measures for Adapting to the Effects of Climate Change

CLIMATE DECISION MAKERS SURVEY

"High Priority (4+5)," 2008



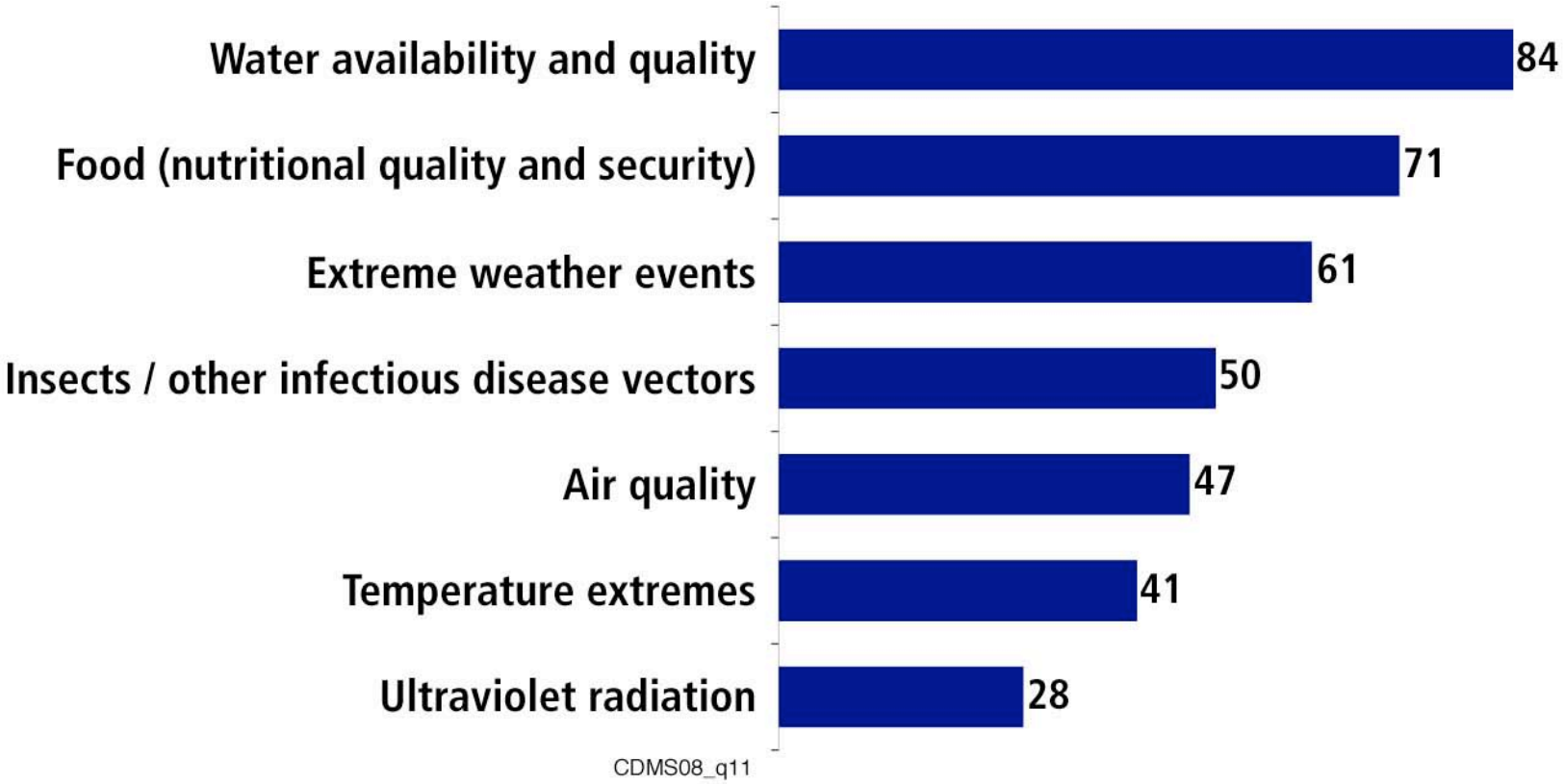
10. Please rate the level of priority that you think should be given to each of the following adaptive measures. Please use a scale of 1 to 5 where 1 means "no priority" and 5 means "very high priority."

GLOBESCAN

Importance of Improving Measures to Protect Human Health from the Effects of Climate Change through Various Sectors

CLIMATE DECISION MAKERS SURVEY

"Important (4+5)," 2008



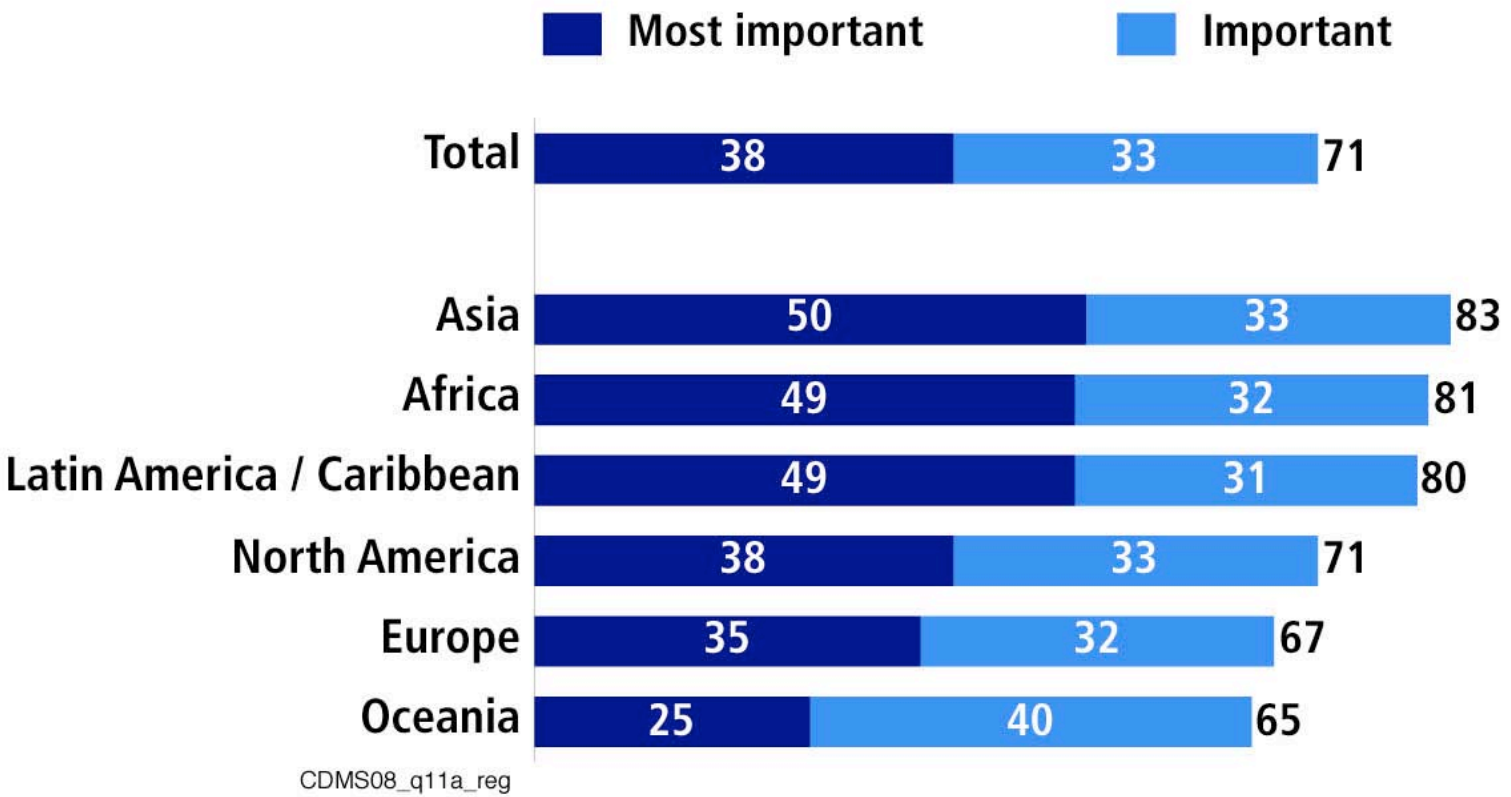
11. Please rate the relative importance to you and your colleagues of improving protective measures against each of the following pathways through which climate change may affect human health.

GLOBESCAN

Importance of Improving Measures to Protect Food Quality/Security to Prevent Human Health Effects of Climate Change

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



11. Please rate the relative importance to you and your colleagues of improving protective measures against each of the following pathways through which climate change may affect human health.

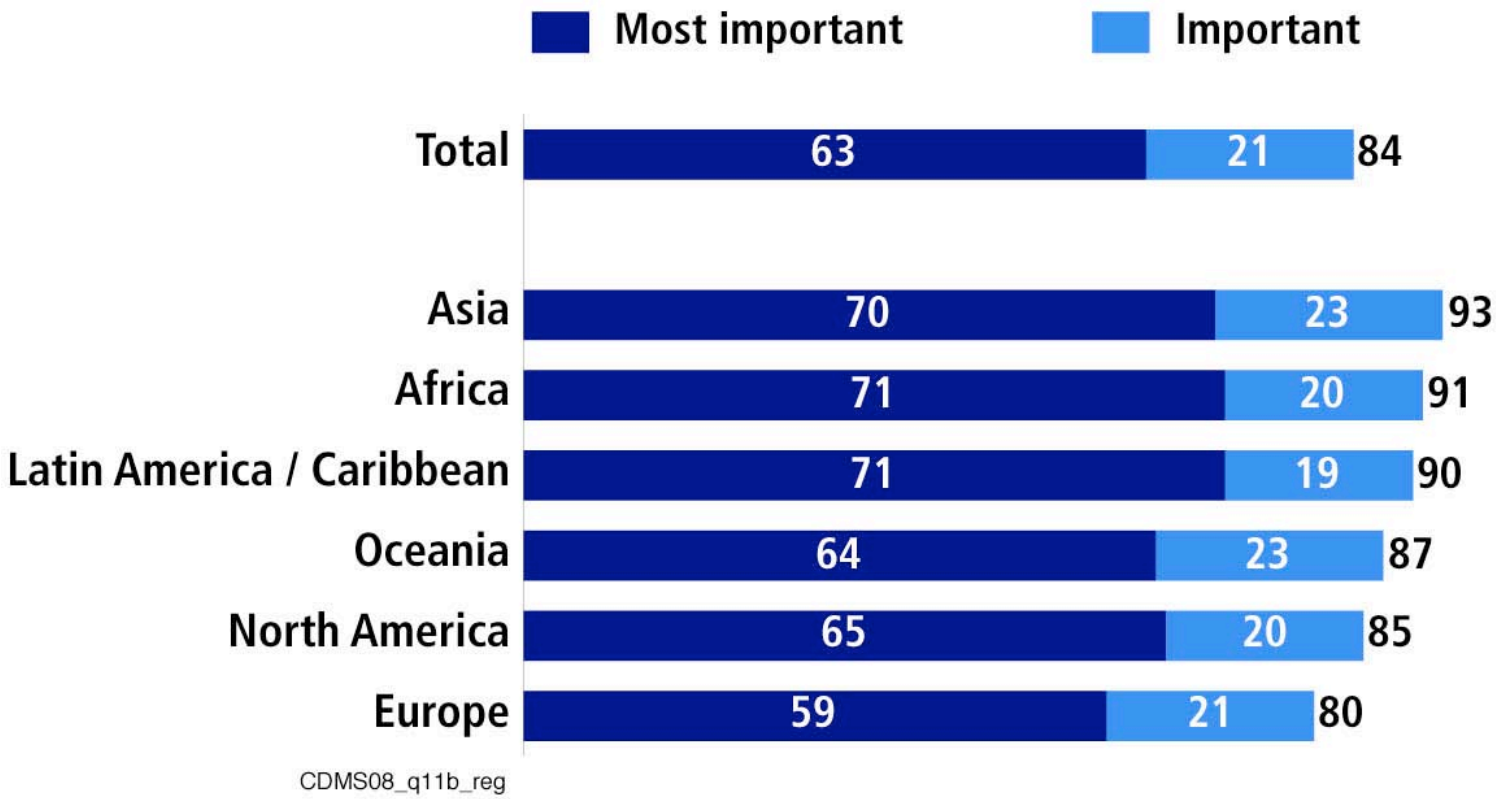
a. Food (including nutritional quality and food security)

GLOBESCAN

Importance of Improving Protection of Water Availability/Quality to Prevent Human Health Effects of Climate Change

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



11. Please rate the relative importance to you and your colleagues of improving protective measures against each of the following pathways through which climate change may affect human health.

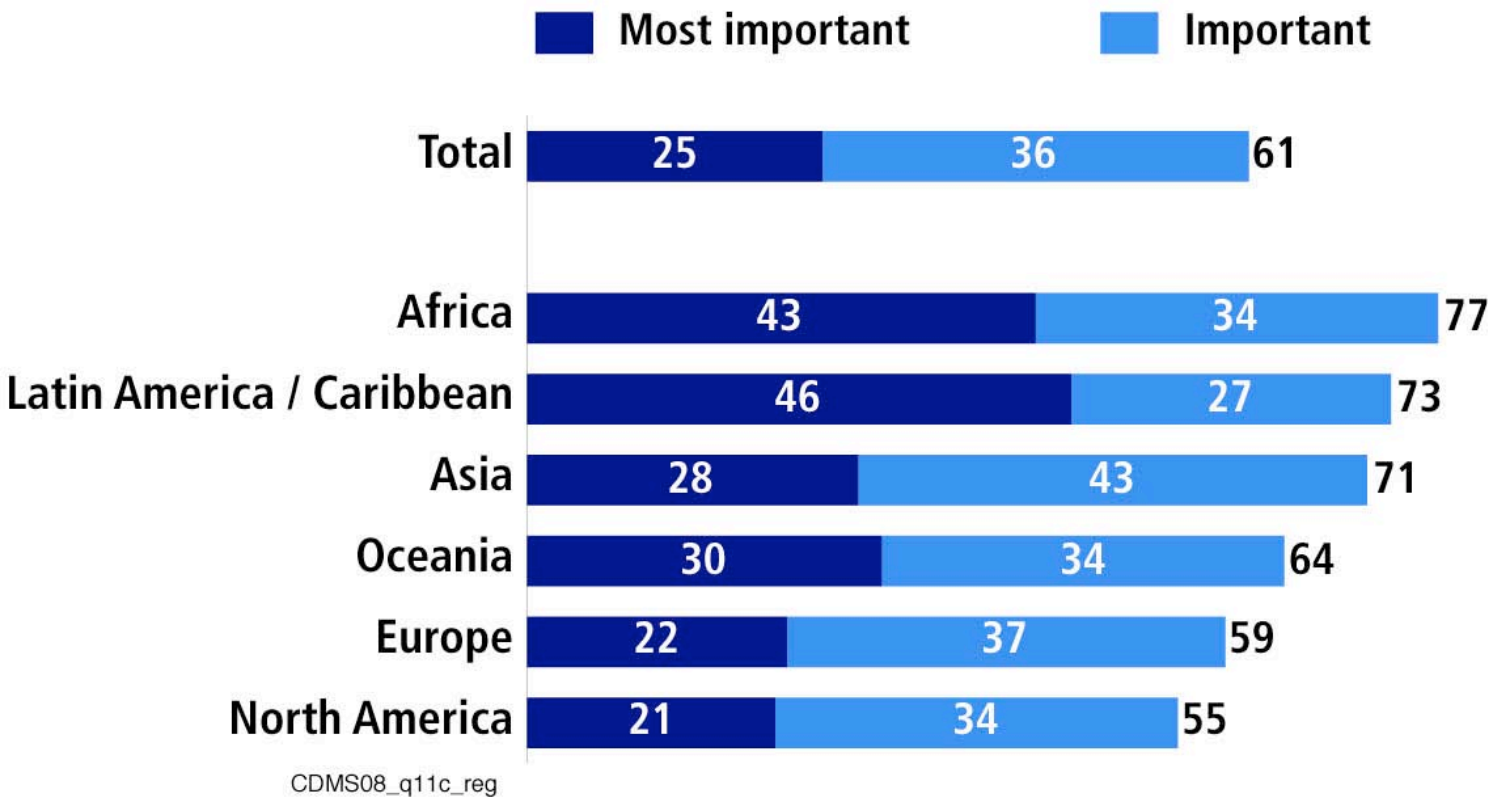
b. Water availability and quality

GLOBESCAN

Importance of Improving Measures against Extreme Weather to Prevent Human Health Effects of Climate Change

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



11. Please rate the relative importance to you and your colleagues of improving protective measures against each of the following pathways through which climate change may affect human health.

c. Extreme weather events such as droughts and storms

GLOBESCAN

Focus on Biodiversity

Focus on Biodiversity

CLIMATE DECISION MAKERS SURVEY

From a biodiversity perspective, addressing deforestation and the conservation of ecosystems and habitats are named as the top priorities for advancing climate change solutions.

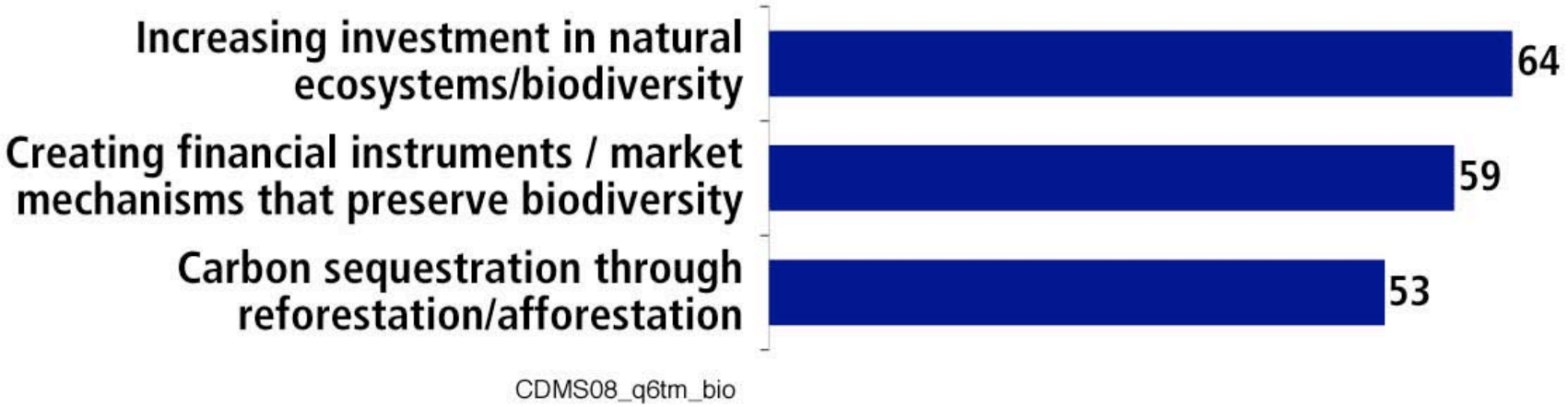
- Pricing mechanisms and investing in renewables and alternatives are also considered priorities.
- Increasing investment in natural ecosystems and creating market mechanisms that preserve biodiversity are rated as high priority factors for climate solutions over the next two years.
- It will be seen in the following slides that addressing biodiversity and ecosystem conservation are among the key components of any post-2012 international agreements on climate change solutions. Decision makers strongly believe that enforceable agreements aimed at limiting deforestation and protecting biodiversity are essential.

GLOBESCAN

Prioritizing Factors Contributing to Climate Change Solutions – Biodiversity

CLIMATE DECISION MAKERS SURVEY

"High Priority (4+5)" Over Next Two Years, 2008



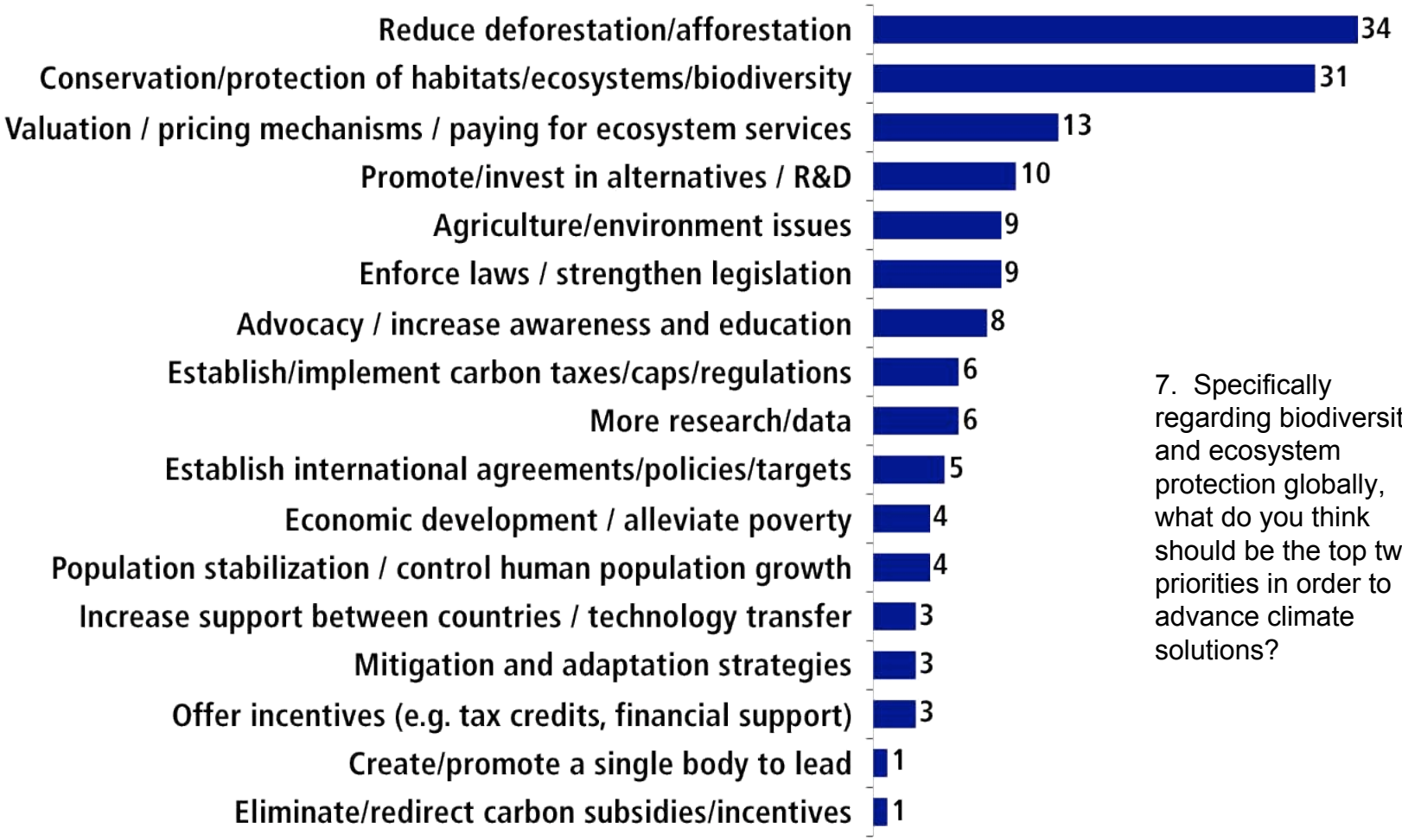
6tm. Many different things can contribute to climate solutions. For each of the following, please indicate how significant a priority you think it should be given over the next two years in order to advance appropriate climate solutions (including mitigation and adaptation):

GLOBESCAN

Top Biodiversity Priorities for Addressing Climate Change

CLIMATE DECISION MAKERS SURVEY

Unprompted, Combined Mentions, 2008



CDMS08_q7

7. Specifically regarding biodiversity and ecosystem protection globally, what do you think should be the top two priorities in order to advance climate solutions?

GLOBESCAN

International Climate Negotiations

International Climate Negotiations

CLIMATE DECISION MAKERS SURVEY

Decision makers call for a strong agreement, with measurable and enforceable targets, that is fair to all nations and not proscriptive to specific regions or industries.

- Prior to COP14 in December 2008, solution providers defined success as gaining commitment from major emitters and reaching a global agreement on CO_2 emissions. National conflicts of interest and non-participation or non-commitment of major emitters and other leaders were seen as the most likely barriers to progress.
- International diplomacy on a post-Kyoto agreement is seen as essential if climate solutions are to be advanced, and addressing this is considered to be a critical issue over the next two years by two-thirds of respondents.
- As part of an adequate and workable post-2012 agreement, decision makers believe it is essential to include all major carbon-emitting countries in the agreement and less critical that all countries in the world be included in the agreement.
- In order for the agreement to be successful, solution providers consider that wealthy countries must provide aid or suitable technology to developing countries to help them manage and reduce their impact on the climate. The agreement must also be fair to countries, with commitments based on each nation's stage of development.
- There is modest support among decision makers for governments of developed countries to commit to "medium term" emissions targets as part of an international agreement, with similar support for a more long-term target that calls for a reduction of emissions by 80% of 1990 levels by 2050. However, decision makers make it clear that committing to long-term targets without short-term reduction commitments will be considered a failure.

GLOBESCAN

International Climate Negotiations

CLIMATE DECISION MAKERS SURVEY

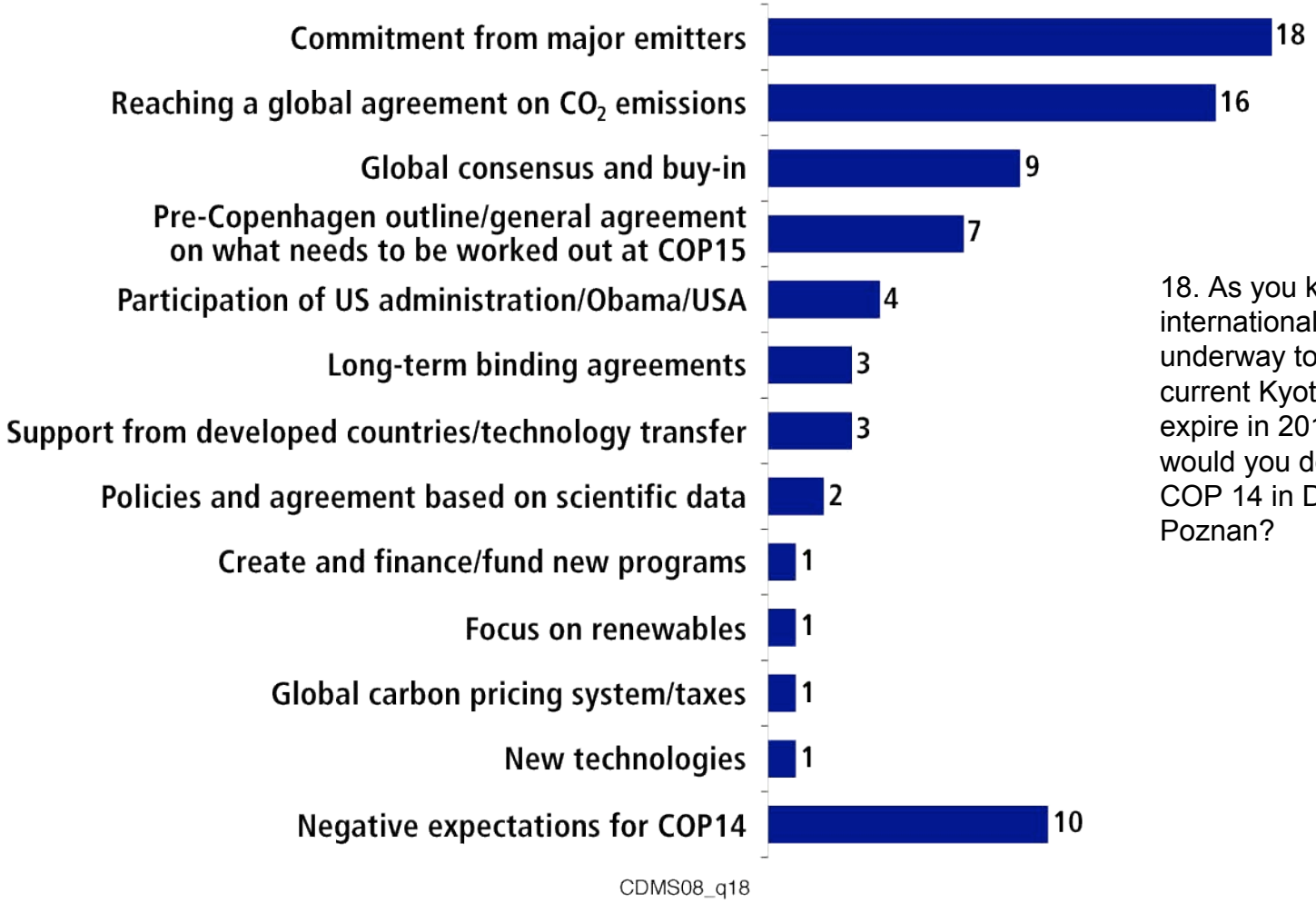
- Respondents call for a strong agreement with measureable and enforceable targets. They do not agree that it is better to agree on a weak post-2012 climate treaty than to achieve no agreement at all.
- There is strong support for the use of GLOBE's Tokyo Framework as a starting point for negotiations that will take place at COP15 in Copenhagen. The agreement calls for a measured long-term stabilization goal, commitments based on stages of development, and strategies for reducing deforestation and protecting biodiversity. Many of GLOBE's components are deemed essential to a successful post-2012 international agreement by the decision-makers surveyed.

GLOBESCAN

Defining Success at COP14

CLIMATE DECISION MAKERS SURVEY

Unprompted, 2008



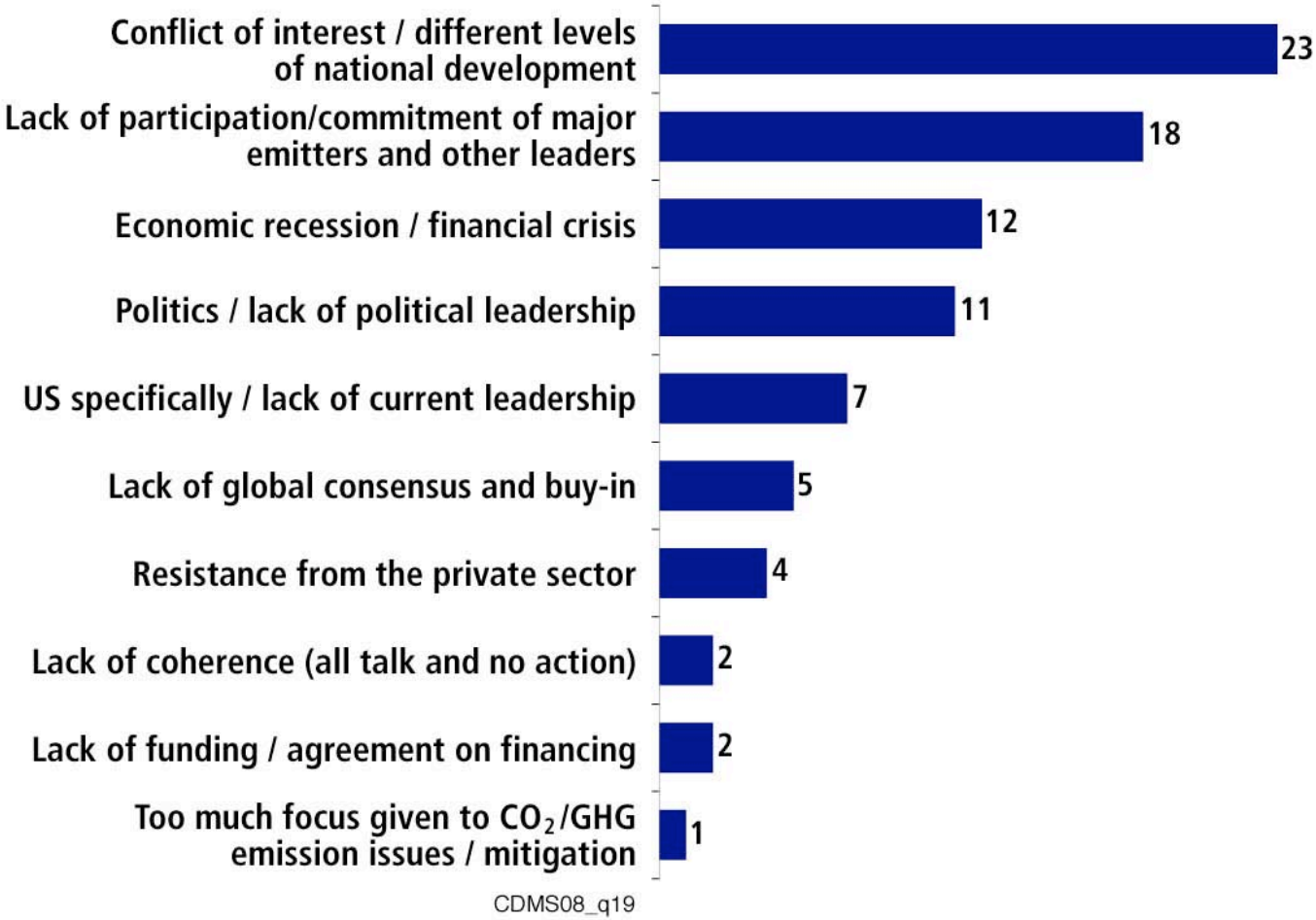
18. As you know, international negotiations are underway to replace the current Kyoto provisions that expire in 2012. Briefly, how would you define success at COP 14 in December 2008 in Poznan?

GLOBESCAN

Greatest Barrier to Success at COP14

CLIMATE DECISION MAKERS SURVEY

Unprompted, 2008



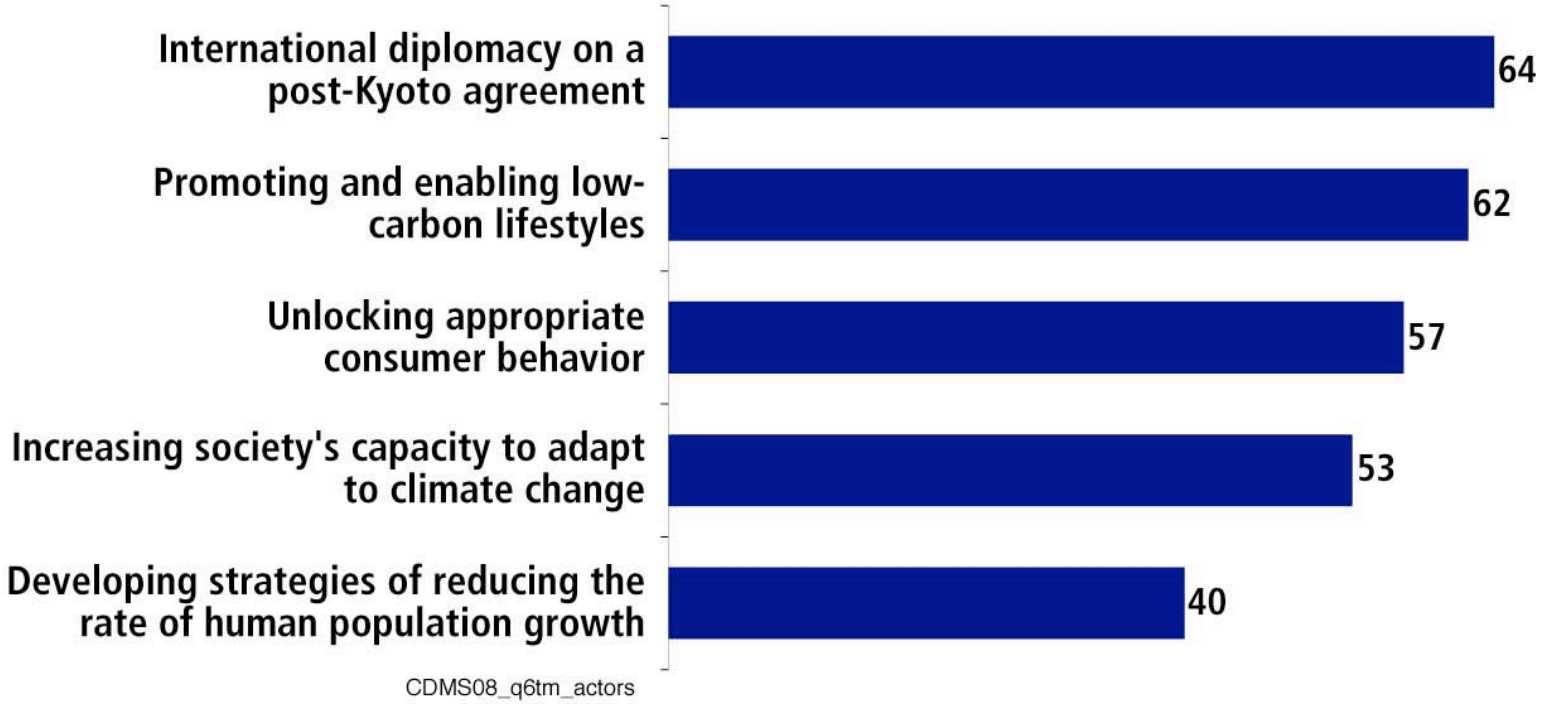
GLOBESCAN

19. What is the greatest barrier to success at COP14?

Prioritizing Factors Contributing to Climate Change Solutions – Actors

CLIMATE DECISION MAKERS SURVEY

"High Priority (4+5)" over Next Two Years, 2008



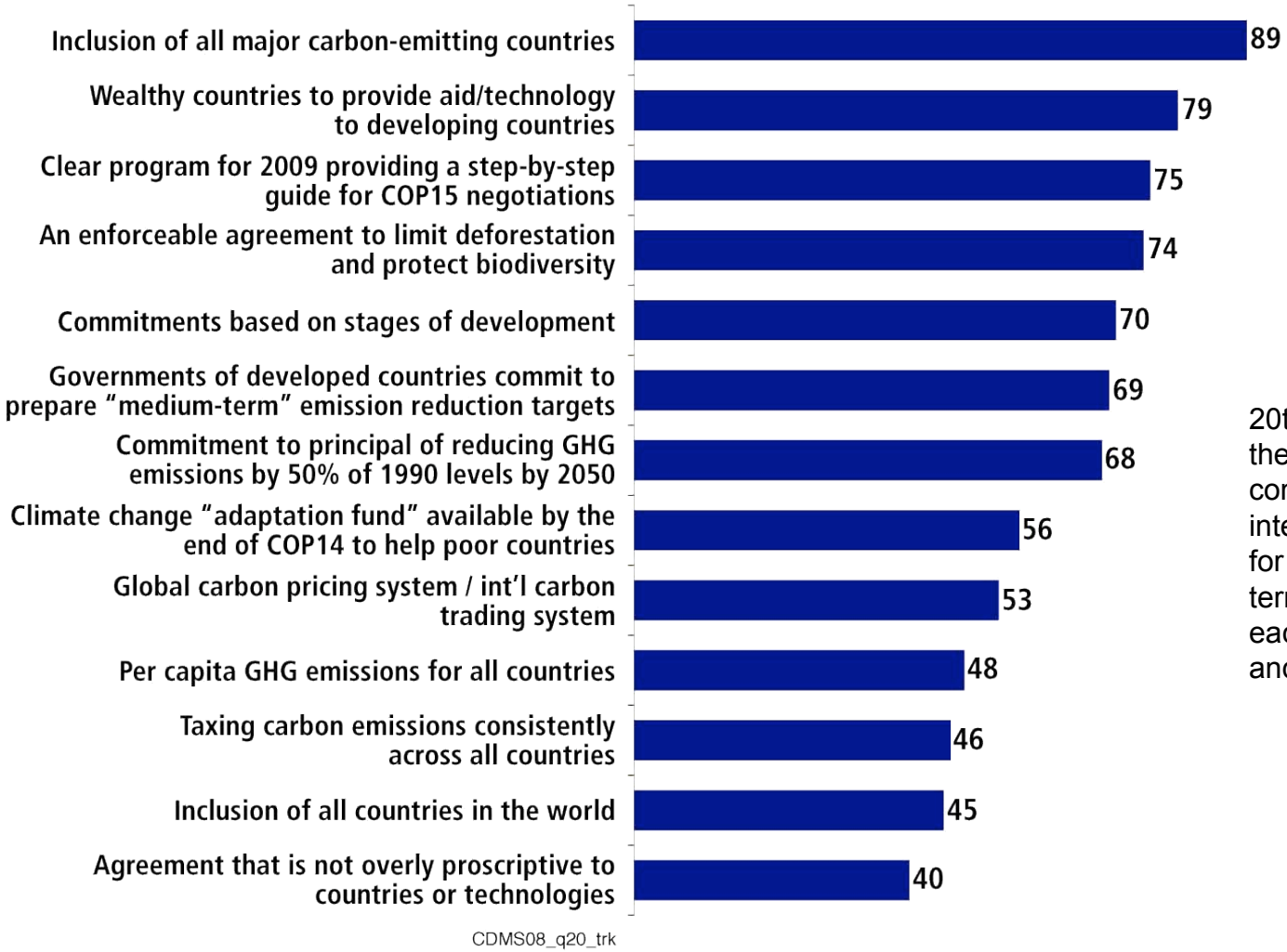
6tm. Many different things can contribute to climate solutions. For each of the following, please indicate how significant a priority you think it should be given over the next two years in order to advance appropriate climate solutions (including mitigation and adaptation).

GLOBESCAN

Components of a Post-2012 International Agreement

CLIMATE DECISION MAKERS SURVEY

"Essential (4+5)," 2008



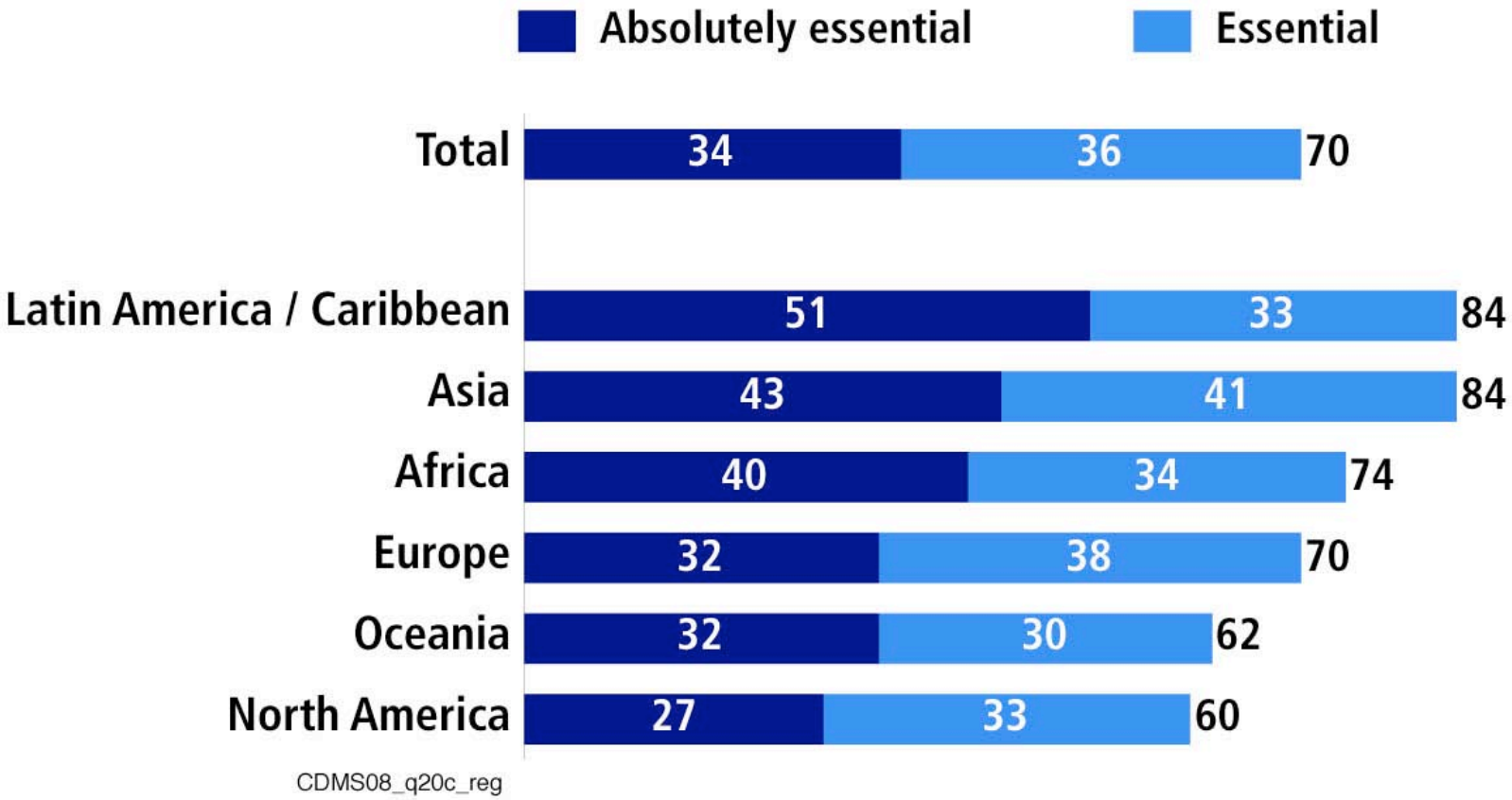
20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

GLOBESCAN

Components of a Post-2012 International Agreement: Commitments Based on Different Stages of Development

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

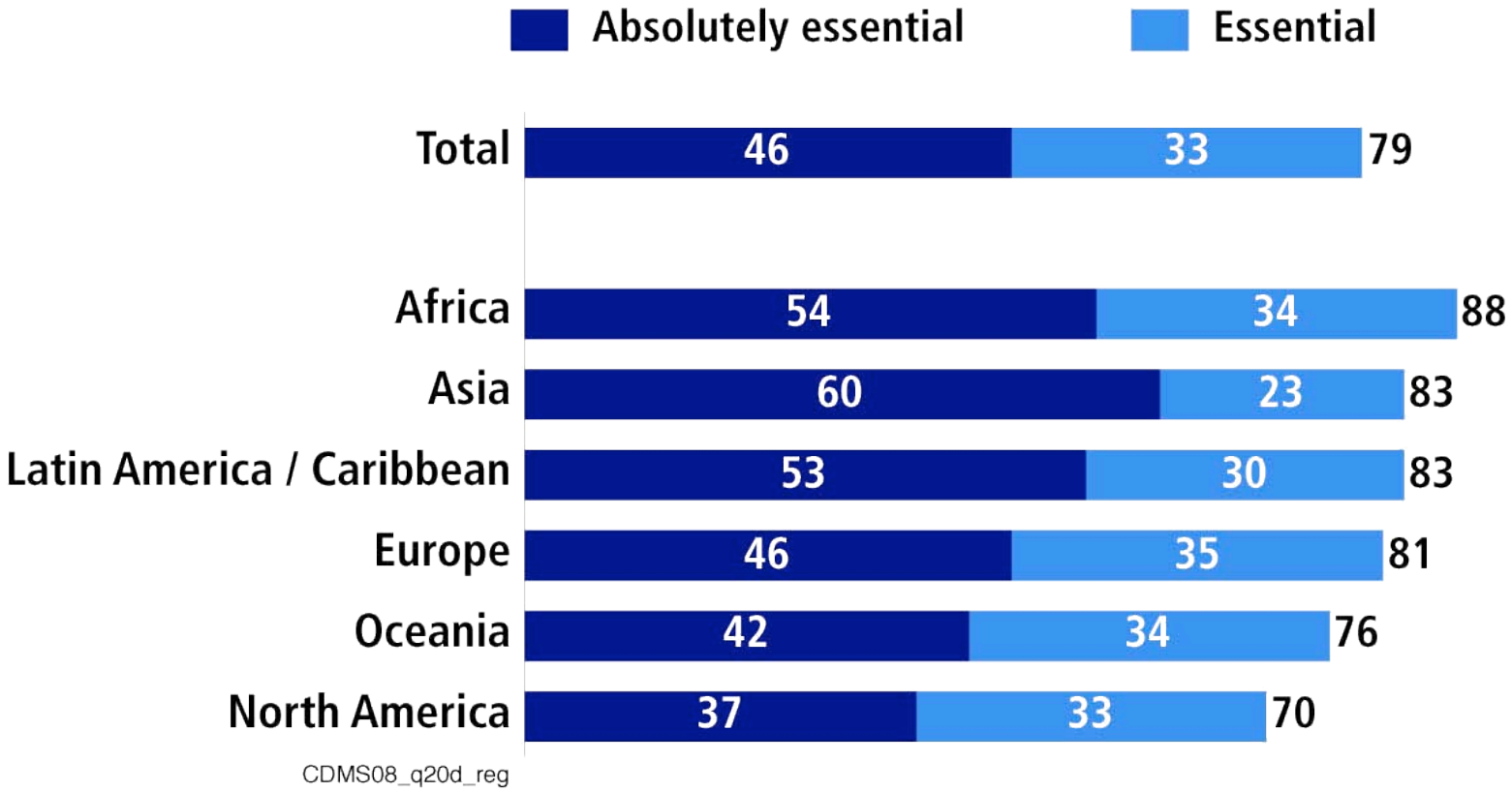
a. Different types of commitments based on countries' stage of development

GLOBESCAN

Components of a Post-2012 International Agreement: Wealthy Countries to Provide Aid/Technology to Poor Countries

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

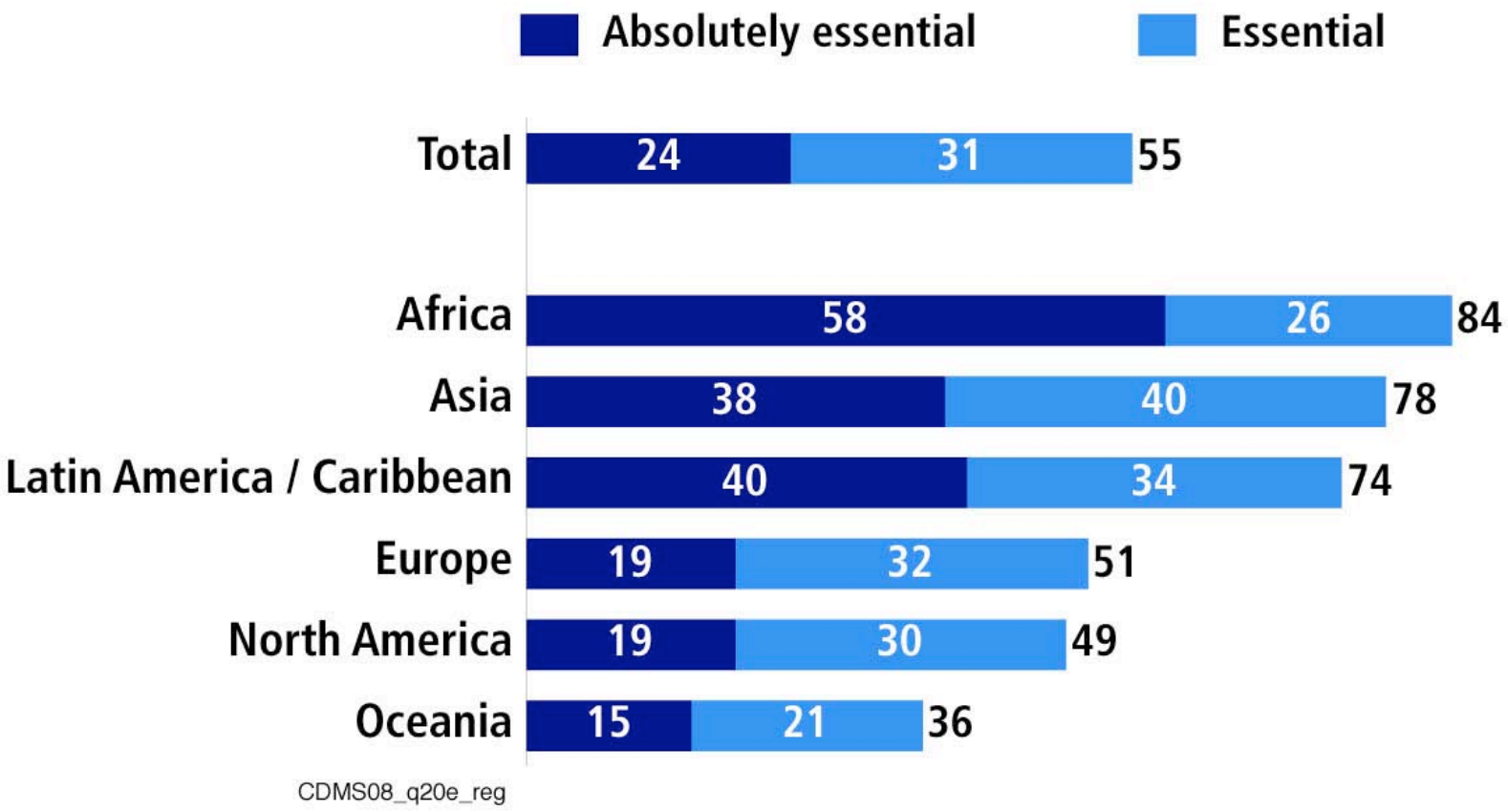
d. Commitment of wealthy countries to provide aid and technology transfer to assist developing countries to meet their targets

GLOBESCAN

Components of a Post-2012 International Agreement: "Adaptation Fund" to Be Available by the End of COP14

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

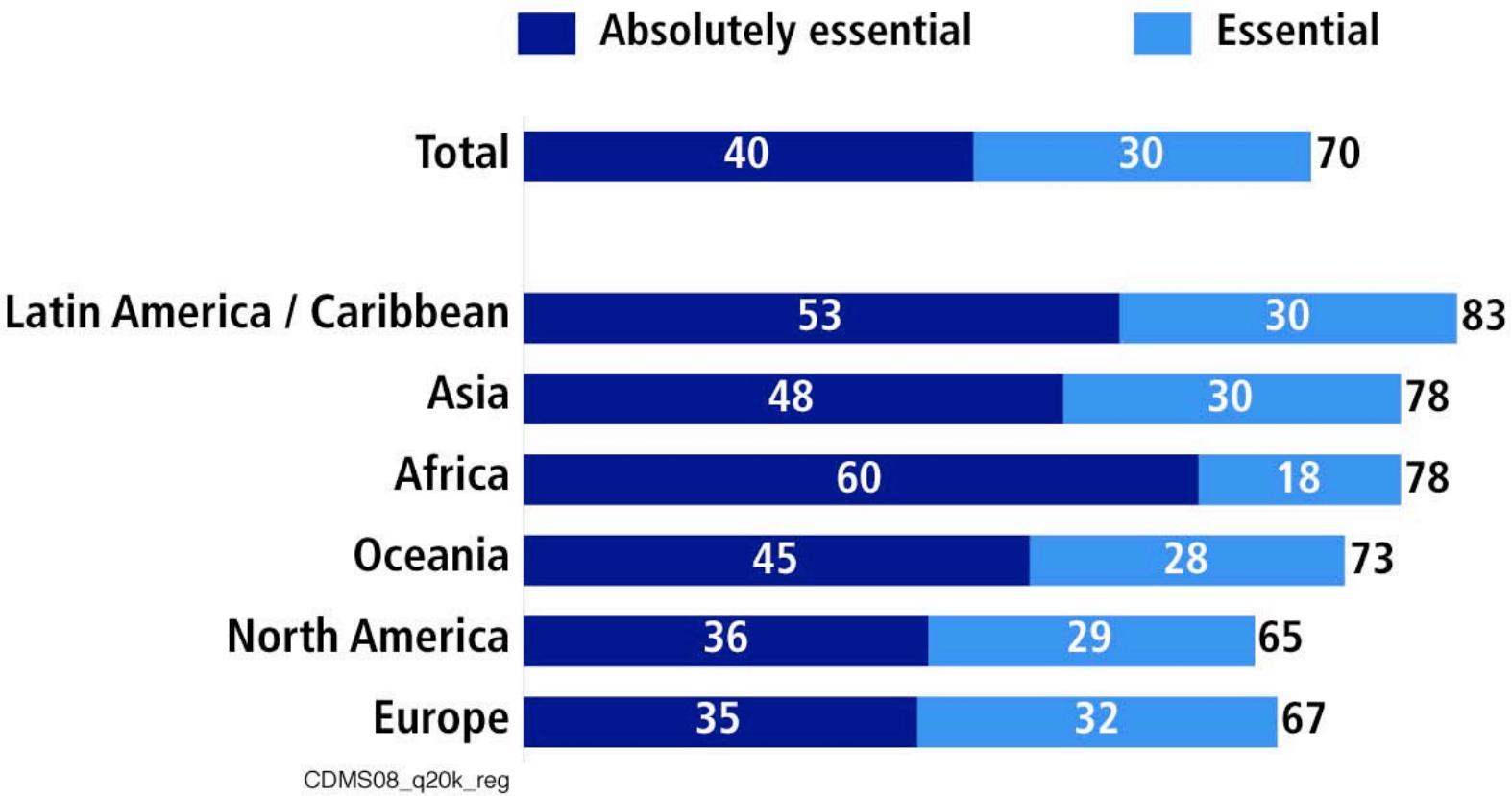
a. A climate change "adaptation fund" to be up and running by the end of the Poznan session to help poor countries cope

GLOBESCAN

Components of a Post-2012 International Agreement: Governments of Developed Countries Commit to Prepare "Medium-Term" Emission Reduction Targets

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

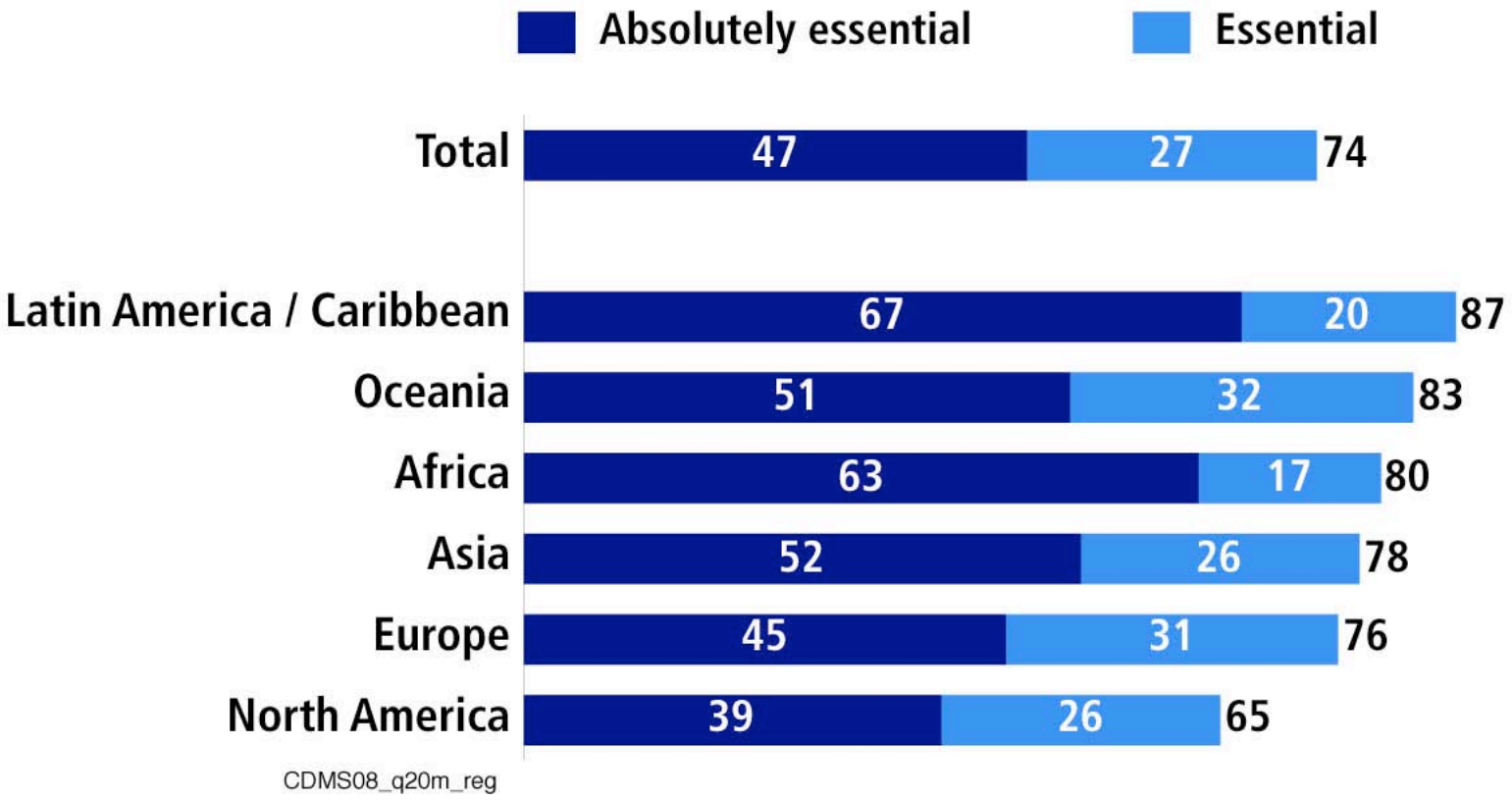
k. Developed world governments commit to begin preparing "medium-term" emission reduction targets to help them progress toward a 50% reduction goal

GLOBESCAN

Components of a Post-2012 International Agreement: An Enforceable Agreement to Limit Deforestation and Protect Biodiversity

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



20t. Please rate each of the following possible components of an international agreement for the post-2012 period in terms of how essential each is for an adequate and workable agreement.

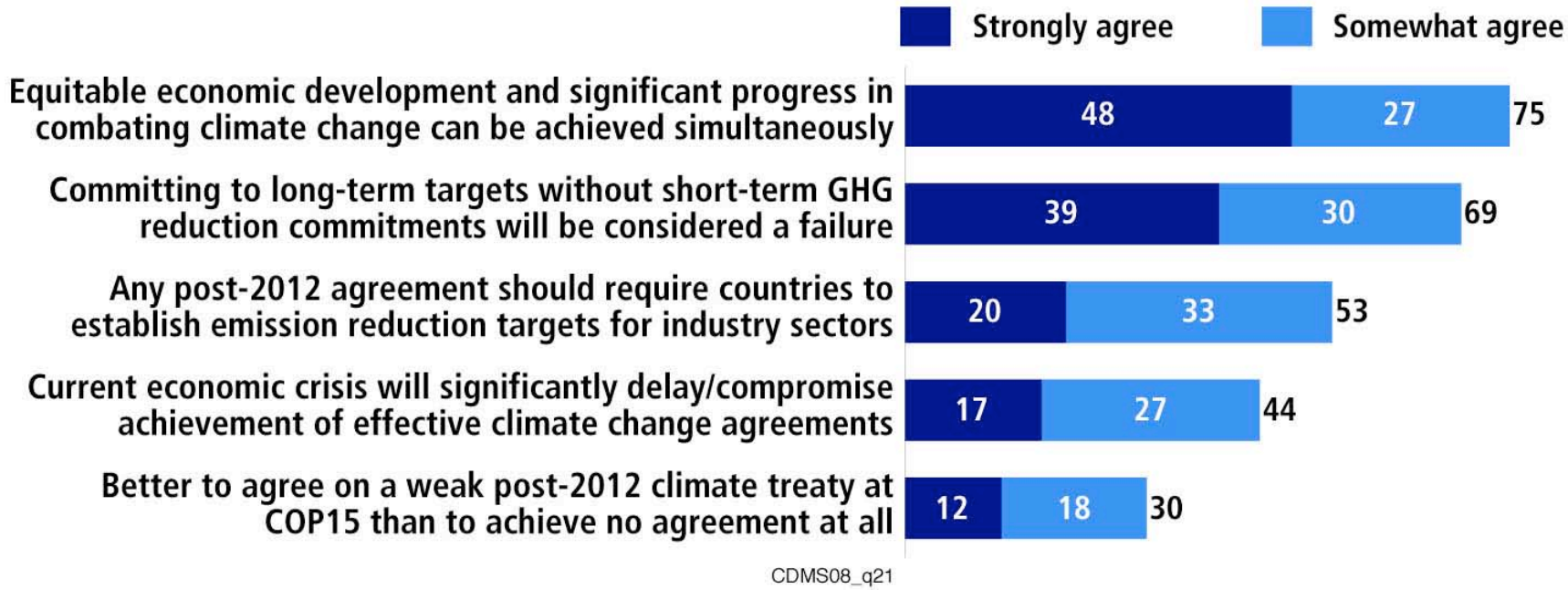
m. An enforceable agreement to limit deforestation and protect biodiversity

GLOBESCAN

Attitudes toward International Climate Negotiations

CLIMATE DECISION MAKERS SURVEY

2008



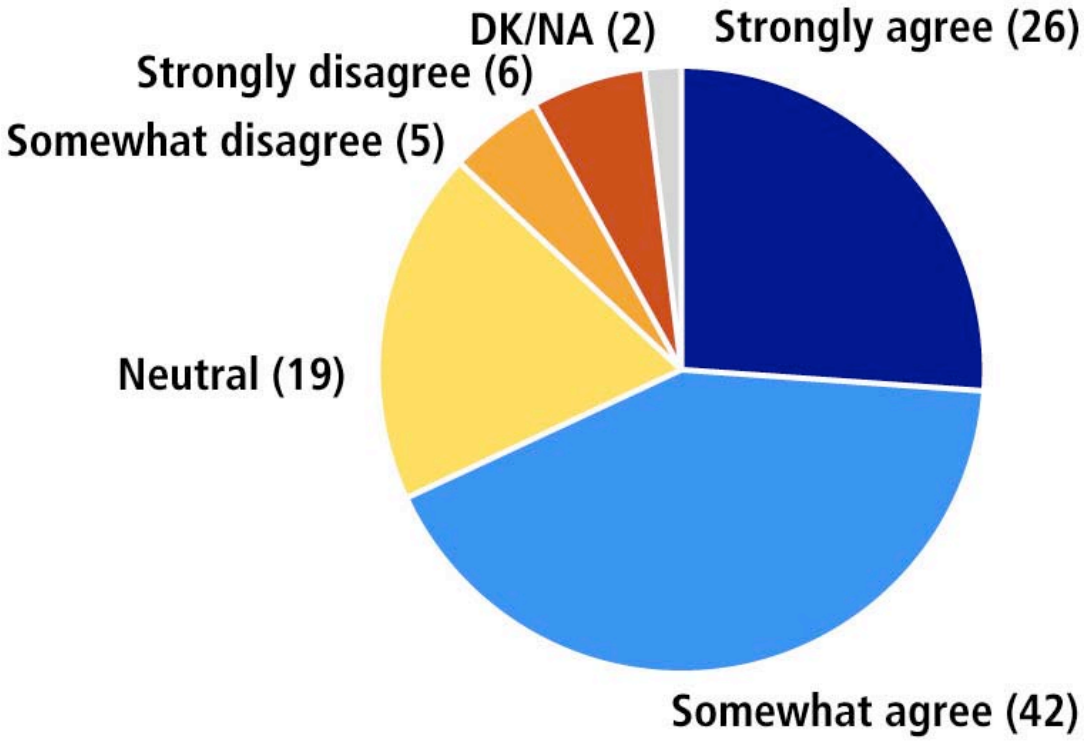
21. Please indicate to what extent you agree or disagree with each of the following statements.

GLOBESCAN

Negotiators Should Use GLOBE's Tokyo Framework as the Basis for an International Agreement

CLIMATE DECISION MAKERS SURVEY

2008



CDMS08_22

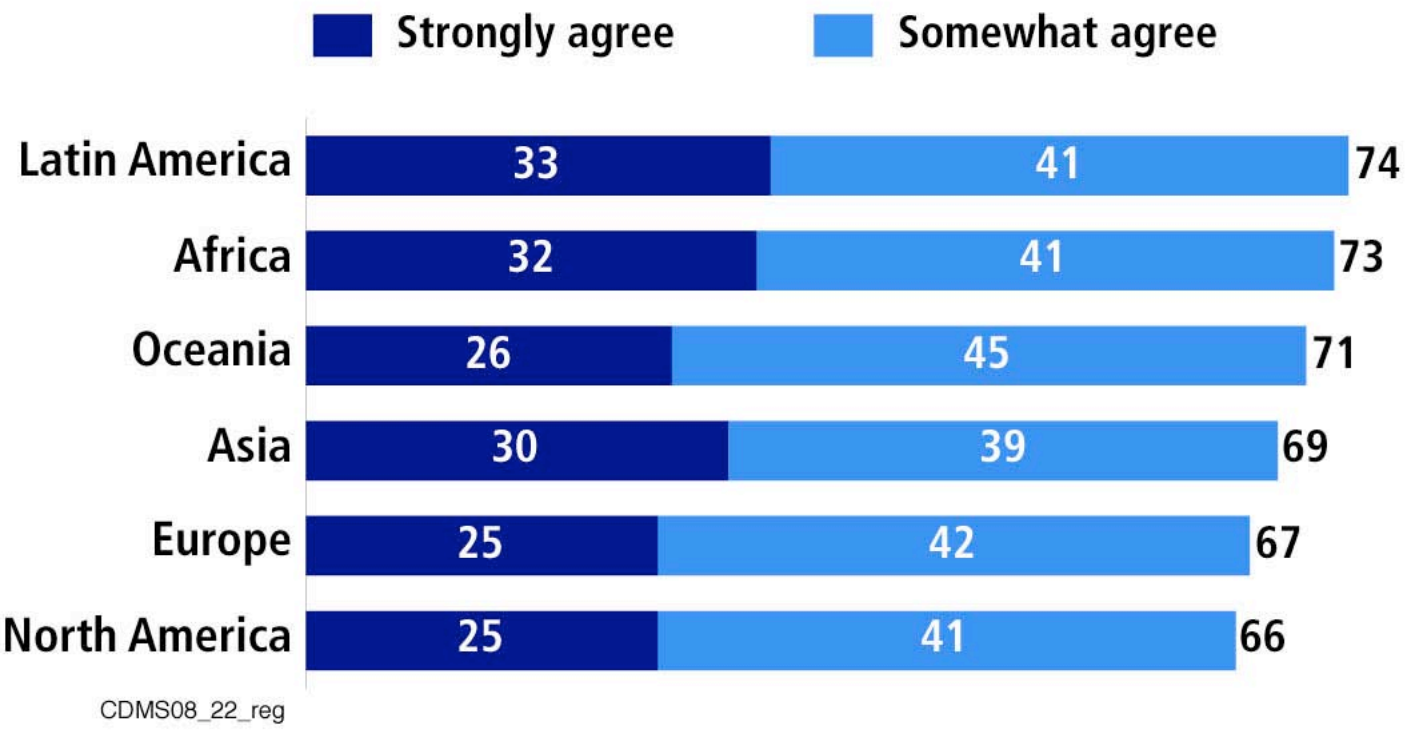
22. To what extent do you agree or disagree that negotiators at COP 14 in Poznan and COP 15 in Copenhagen in 2009 should use this framework as the basis for a new post-2012 agreement under the auspices of the UNFCCC?

GLOBESCAN

Negotiators Should Use GLOBE's Tokyo Framework as the Basis for an International Agreement

CLIMATE DECISION MAKERS SURVEY

By Region, 2008



22. To what extent do you agree or disagree that negotiators at COP 14 in Poznan and COP 15 in Copenhagen in 2009 should use this framework as the basis for a new post-2012 agreement under the auspices of the UNFCCC?

GLOBESCAN