Our 2022 survey revealed that most climate and AI leaders want to use AI to fight climate change, but face clear obstacles in adopting it

To gauge public- and private-sector leaders' opinions on the use of AI in the fight against climate change, BCG conducted a survey of over 1,000 executives with full or partial decision-making authority regarding AI and/or climate

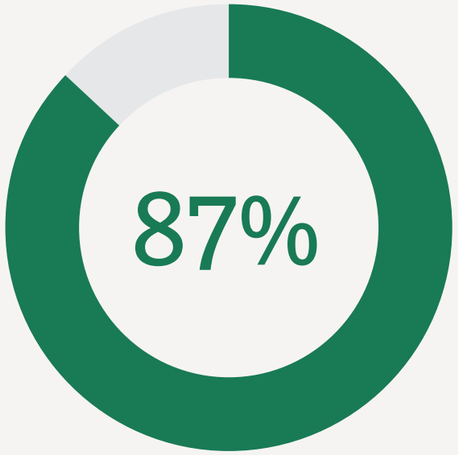
The sample, collected in May 2022, covers 14 countries (Argentina, Australia, Brazil, Chile, China, France, Germany, India, Japan, New Zealand, South Africa, Spain, the UK, and the US)

Key findings

- **87%** of climate and AI leaders find AI to be a helpful tool in the fight against climate change
- **43%** of organizations , led by industrial goods companies, can envision using AI for their own climate efforts today
- The US leads among Global North countries, with more than half of its leaders envisioning using AI for climate at their organizations
- Even leaders already engaged in the space face major obstacles to climate AI use: **78%** cite insufficient access to AI expertise, **77%** have limited availability of AI solutions, and **67%** face a lack of confidence in AI data and analysis
- **67%** of private-sector climate and AI leaders want governments to do more to support the use of AI to combat climate change
- Leaders see the greatest business value for AI in the reduction and measurement of emissions

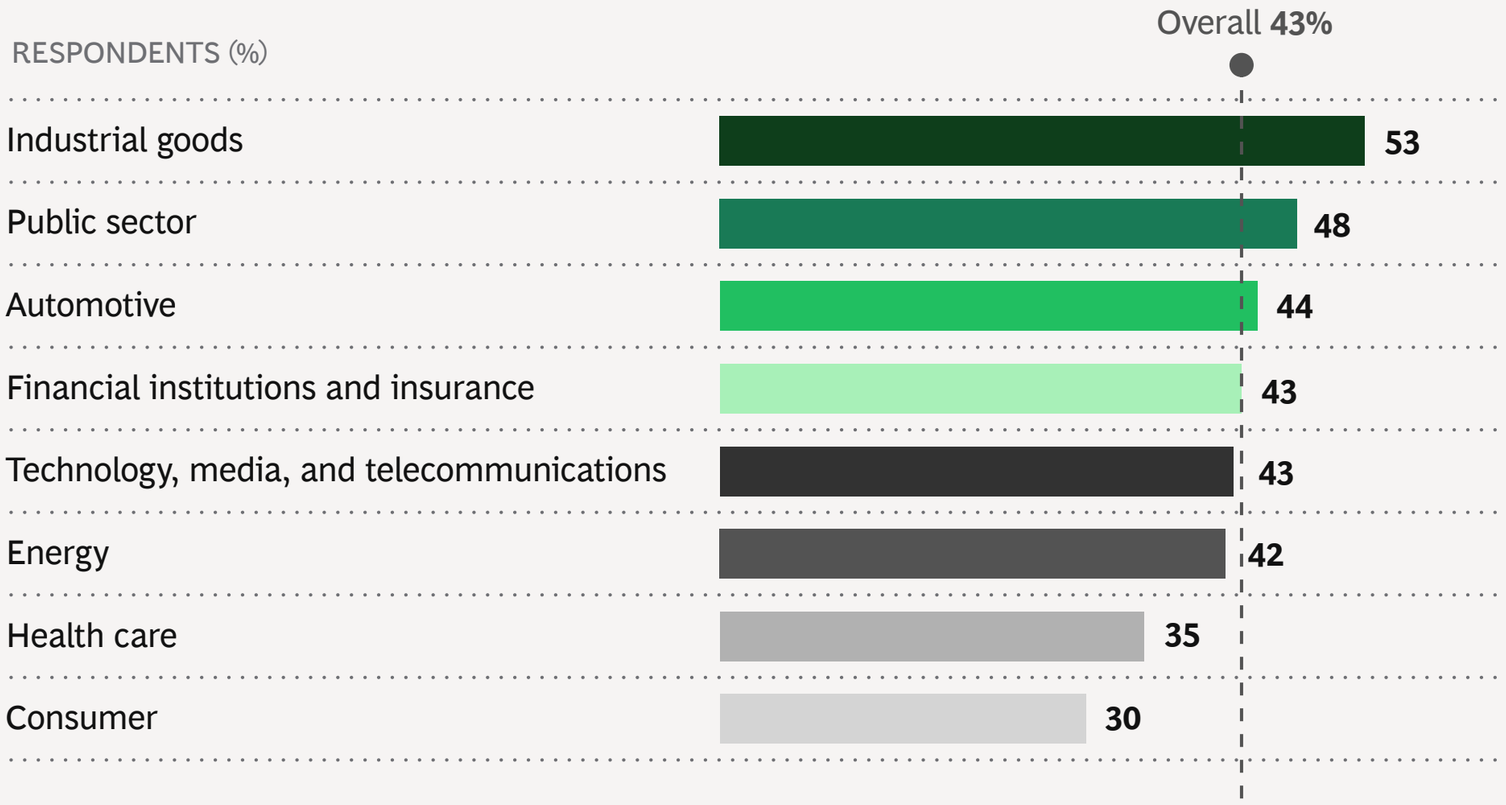
Source: BCG Climate AI survey, May 2022.

Public- and private-sector leaders who oversee climate and AI topics support using AI to fight climate change, but only 43% have a vision for how to use it



of respondents say that AI is a helpful tool in the fight against climate change

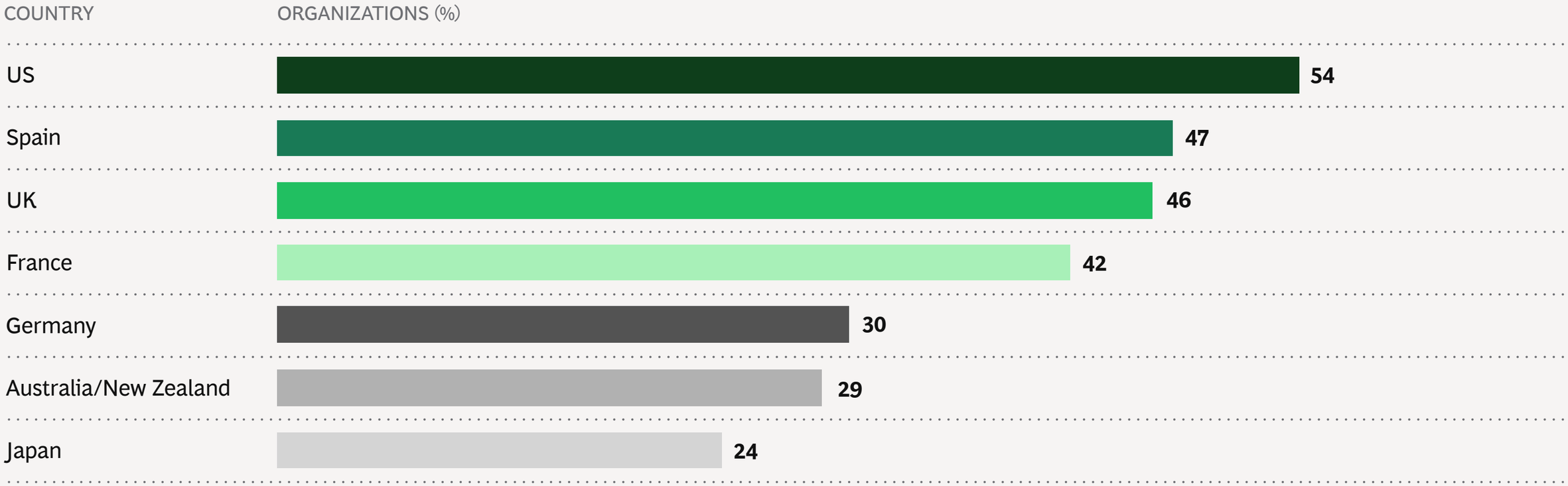
Just 43% of organizations can envision using AI for their own climate efforts



Source: BCG Climate AI survey, May 2022.
Note: All respondents have decision-making authority over climate or AI topics at their organizations. Respondents were asked if their organization has a "clear vision for how advanced analytics and AI can be used in climate change efforts." "Public sector" excludes academia.

More than half of US leaders envision using AI in climate change, versus about a quarter of Japanese leaders

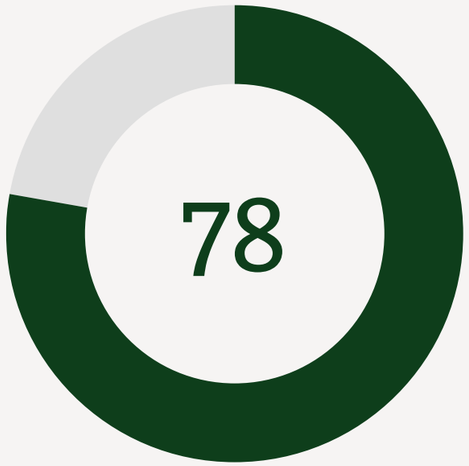
Roughly 40% of organizations can envision using AI for their own climate efforts



Source: BCG Climate AI survey, May 2022.
Note: Respondents were asked if their organization has a "clear vision for how advanced analytics and AI can be used in climate change efforts."

Leaders cite insufficient expertise, availability, and confidence as obstacles to using AI in their climate change efforts

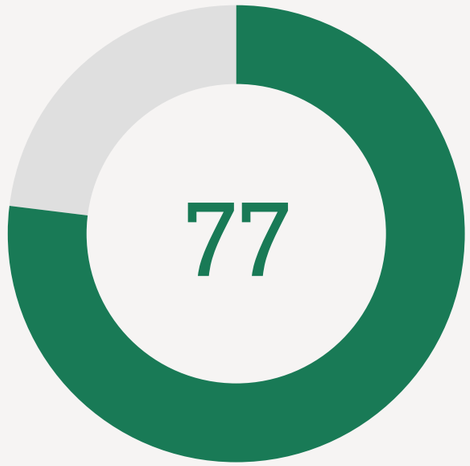
Respondents listed the following as obstacles (%)



Insufficient access to AI expertise, inside or outside the organization

85% PUBLIC SECTOR

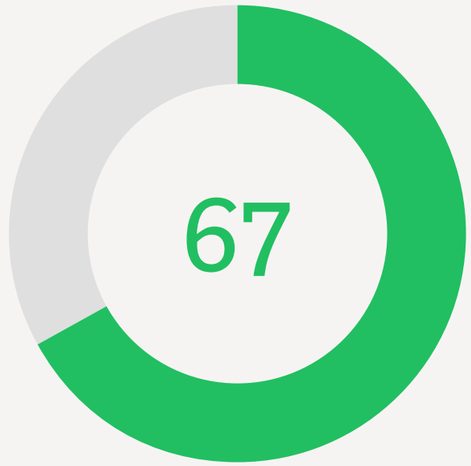
75% PRIVATE SECTOR



Limited availability of AI solutions and products

82% PUBLIC SECTOR

74% PRIVATE SECTOR



Lack of confidence in AI data and analysis

77% PUBLIC SECTOR

64% PRIVATE SECTOR

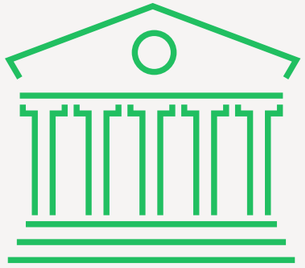
Source: BCG Climate AI survey, May 2022.
Note: All respondents have decision-making authority over climate or AI topics at their organizations. Respondents were permitted to give more than one answer. “Public sector” excludes academia.

Private-sector leaders recognize the potential of advanced analytics and AI and want governments to do more to support using AI to fight climate change

PRIVATE SECTOR

67%

of private-sector respondents feel that governments should do more to support the use of climate-AI



PUBLIC SECTOR

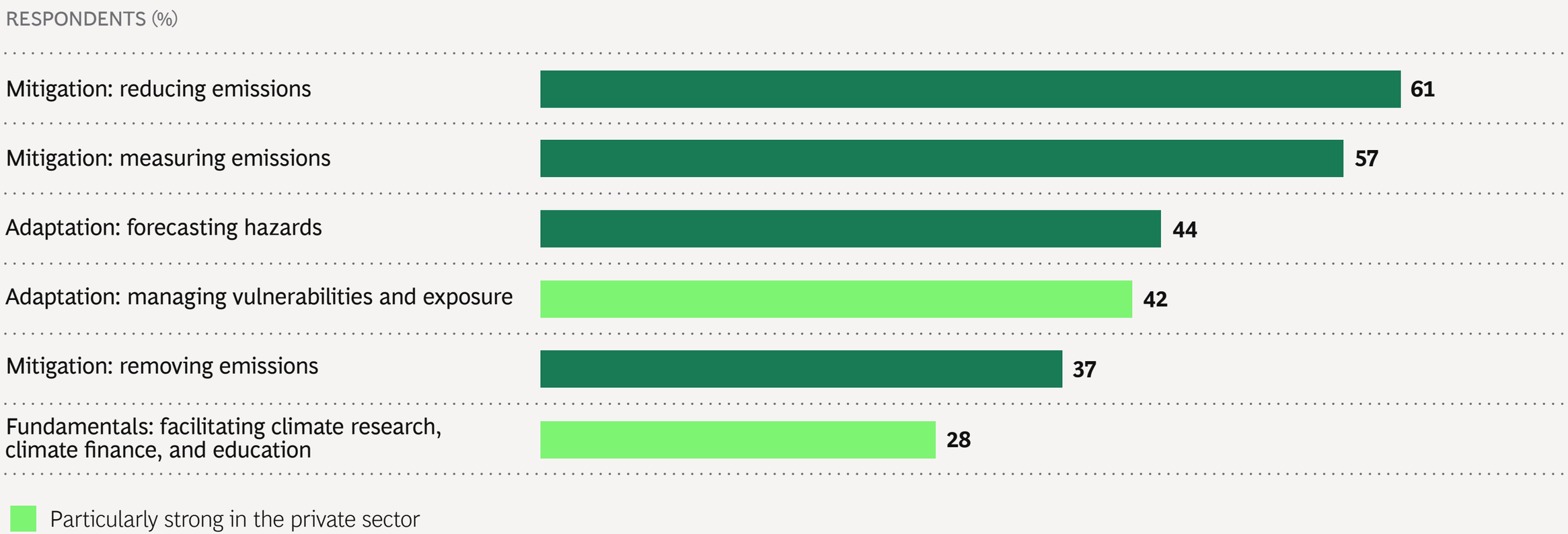
39%

of public-sector respondents say that governments should do more to support the private-sector use of climate AI

Source: BCG Climate AI survey, May 2022.
Note: Represents 735 private sector respondents and 218 public sector respondents. “Public sector” excludes academia.

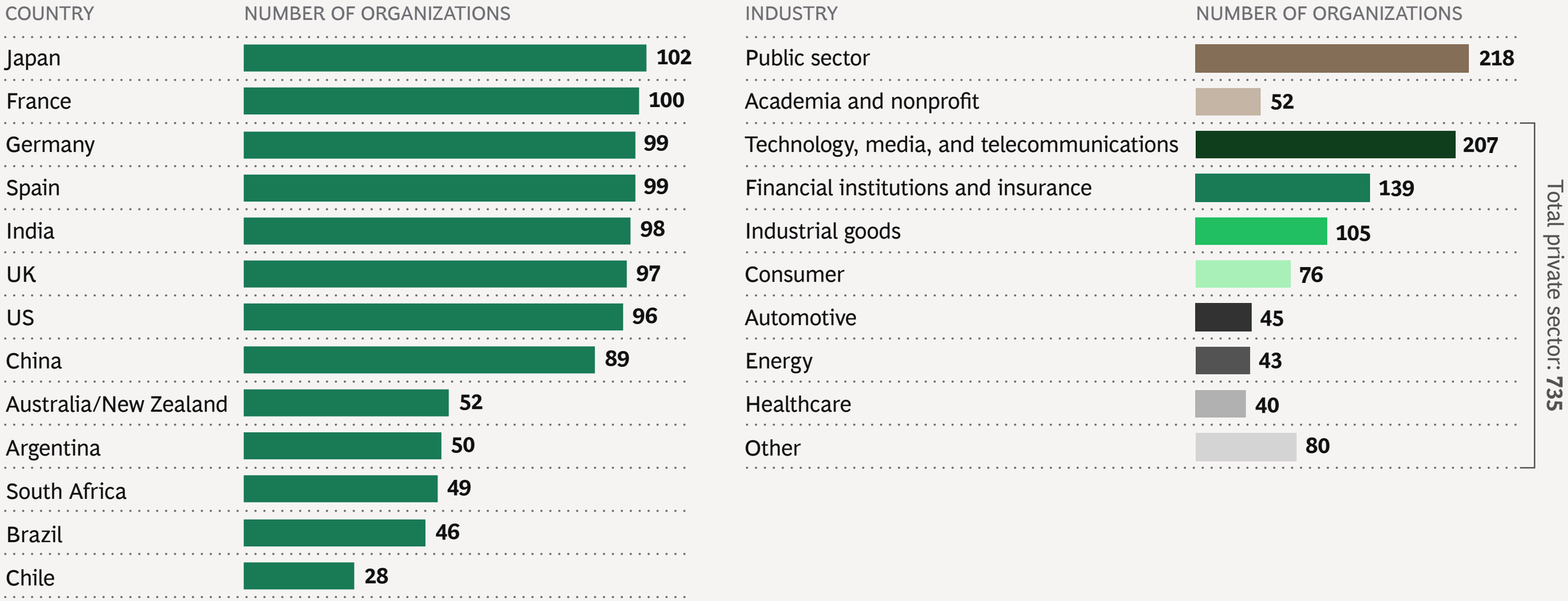
Public- and private-sector leaders see the greatest business value in reducing and measuring emissions

In which areas of climate-related advanced analytics and AI do you see the greatest business value for your organization?



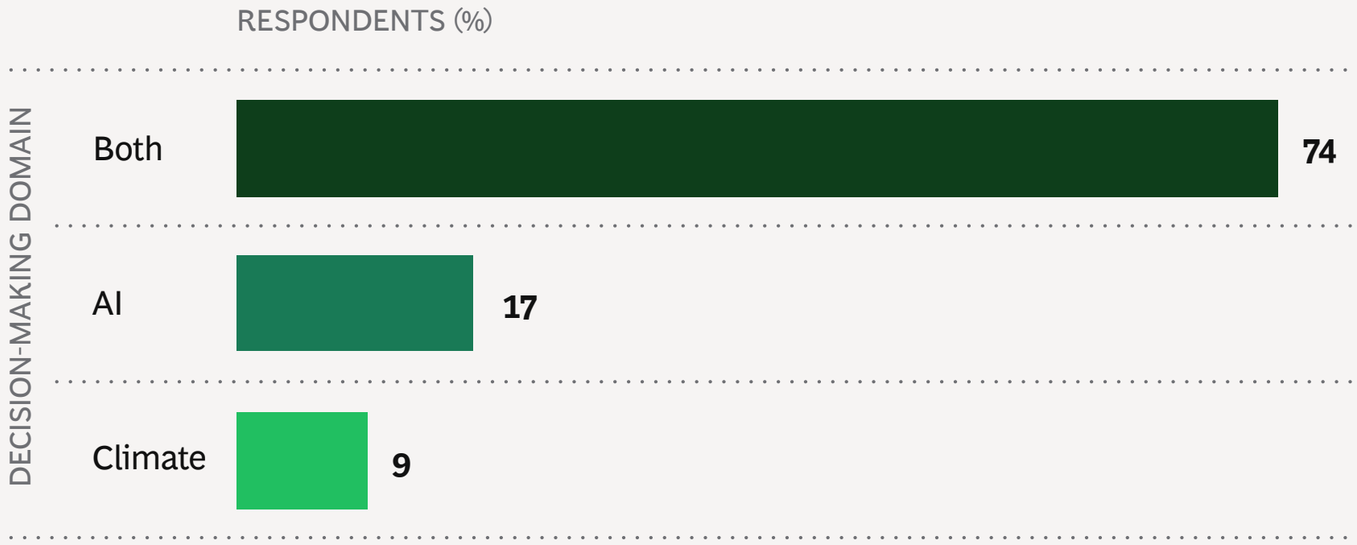
Source: BCG Climate AI survey, May 2022.
Note: All respondents have decision-making authority over climate or AI topics at their organizations. Respondents were permitted to give more than one answer.

Survey methodology: We surveyed 1,005 AI and climate leaders across 13 countries and 9 industries



Source: BCG Climate AI survey, May 2022.
Note: "Public sector" excludes academia. "Other" includes 22 respondents whose organizations primarily focus on serving the public sector, nonprofits, or academia.

All respondents in our survey were primary or joint decision makers on either AI or climate, and 74% were decision makers on both

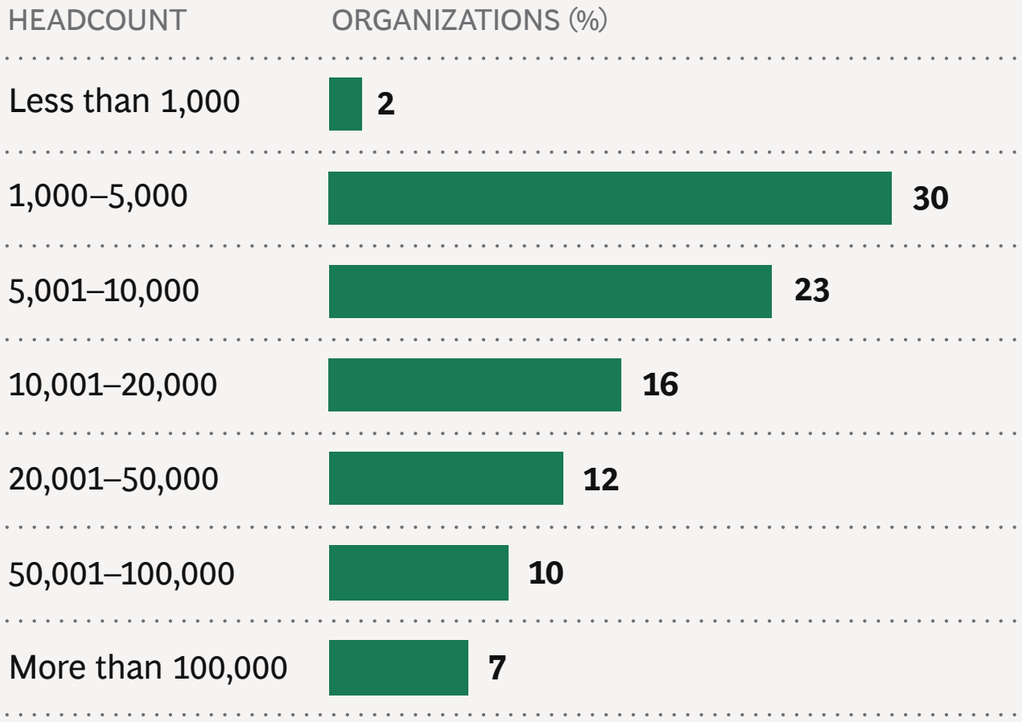


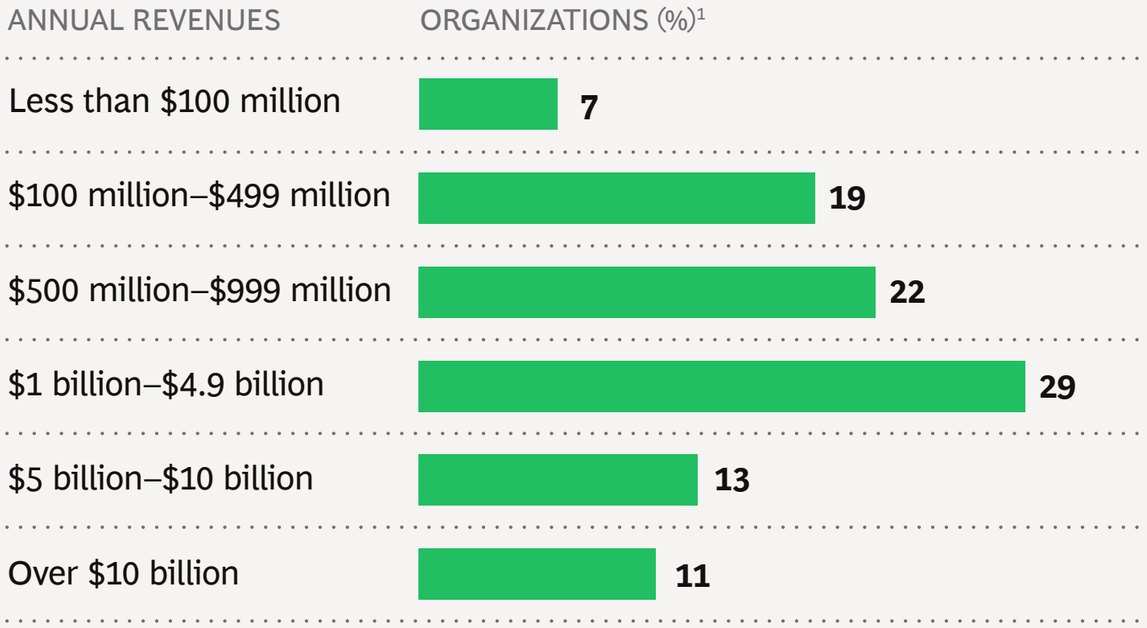
We questioned these leaders on their opinions across two main topics:

- **Potential of AI** as a tool in the fight against climate change
- **Roadblocks** preventing adoption of climate AI

Source: BCG Climate AI survey, May 2022.

The survey represents organizations across a wide range of headcounts and annual revenues





Source: BCG Climate AI survey, May 2022.
Note: Because of rounding, the percentages given for the individual bars in a column may not add up to 100%.
[1]Includes only private-sector organizations.