



## SAINT-GOBAIN REVEALS THE RESULTS OF THE SECOND EDITION OF THE SUSTAINABLE CONSTRUCTION BAROMETER

Convinced of the urgency of advancing the cause of sustainable construction in the face of climatic, demographic issues and the protection of resources, Saint-Gobain launched the Sustainable Construction Observatory in 2023. This Observatory presents today the second edition of the Sustainable Construction Barometer<sup>1</sup>, a study conducted by the CSA research institute, to understand the trends and levers to be activated to accelerate the development of sustainable construction.

**In the words of Benoit Bazin, CEO of Saint-Gobain:** *“The Sustainable Construction Barometer is intended to be a decision-making tool for all stakeholders in the sector, so that we can gain a better understanding of local sustainable construction issues and move from reflection to concrete action, in order to build a sustainable future for generations to come”.*

### A broader study to accelerate sustainable construction

Initiated in 2023 in 10 countries, the [Sustainable Construction Barometer](#) is now based on a **quantitative survey of professionals, students, elected representatives and association members in 22 countries**. Taking the pulse of sustainable construction, the Barometer takes the measures progress and identifies the fields of action on which to focus efforts to move this priority issue forward and position it as a strategic and essential response to major contemporary challenges: climate, resources and rapid urbanization accelerated by demographic pressure. This expanded study provides an even clearer picture of the local and, ultimately, global issues at stake.

### Four key findings emerge from this new Barometer

- Stable perceptions on sustainable construction with an unchanged environmental viewpoint. The health and well-being of building occupants is still poorly recognized and promoted;
- A shared sense of urgency, but which requires better awareness-raising and cooperation;
- More informed, trained and committed players;
- To be effective, sustainable construction deployment must be well adapted to local realities.

**95% of respondents agree that the implementation of more sustainable construction is an important or priority issue.**

This degree of urgency is clearly **shared by all players, regardless of geographic region**. At the same time, **understanding of sustainable construction** seems partial, often limited to environmental issues. Its definition is still largely associated with "green construction": with a connotation directly linked to the energy efficiency of buildings (42%) and to achieving carbon neutrality in construction (33%). Notions of resilience and occupant comfort are considered more secondary. The only exception is Turkey, where sustainable construction is perceived more in terms of the well-being of inhabitants, at 25% compared to 14% for the world average.



**While awareness is high, it varies depending on the category of respondents: 87% of respondents said they were familiar with sustainable construction, but 20% of elected representatives surveyed said they had never heard of it.**

Overall, awareness of sustainable construction is high: 87% of those questioned said they were familiar with sustainable construction. This figure is up by +5 points<sup>2</sup>. 68% of respondents claim to be sufficiently informed. However, more needs to be done to educate elected representatives, 20% of whom said they had never heard of sustainable construction. And yet, **the desire and commitment are there: the vast majority of players in all countries (87%) agree that we need to go further in terms of sustainable construction**, even if the desire for the status quo is growing (9%, +4 points<sup>2</sup>).

Among the priority actions to be taken to accelerate the development of sustainable construction, **raising public awareness is considered crucial, as is the issue of perceived cost, and the cooperation of all stakeholders**. On the other hand, **the role of public initiatives (standards, regulations, subsidies), though fundamental, remains underestimated**. Lastly, **energy renovation appears to be a priority in countries with a well-established building stock**, like France, compared to countries that prioritize new-build programs to house a growing population, such as Canada, Latin America and Asia.

**92% of construction professionals believe that sustainable construction will make up all or part of their business within the next 5 years.**

Architects and engineering firms are at the top of the list of players most often cited for advancing sustainable construction. While building design professionals are credited with 29% of first-intention responses, elected representatives and public institutions follow close behind, with 21% and 20% respectively. On a positive note, professionals feel strongly committed to sustainable construction: **85% say they carry out all or part of their business in this area, and 92% expect to do so within the next five years.**

**Lack of commitment to sustainable construction is perceived as a discriminating factor.** Many professionals (62%, +3 points<sup>2</sup>) consider their suppliers' commitment to sustainable construction as a selection criterion. As far as elected representatives are concerned, the sustainable dimension is a decisive criterion for awarding public contracts: **almost 9 out of 10 consider this criterion to be important.**

Finally, among students who perceive the implementation of more sustainable constructions as a priority, **45% of them say they would not accept a job offer from a company that was not committed to sustainable construction.**

## Focus: Sustainable Construction Barometer findings for France

### Energy renovation lagging behind but with great potential

Saint-Gobain's Sustainable Construction Observatory has presented a qualitative study on the issue of energy renovation in France, also conducted by the CSA research institute. It is based on 20 interviews with French stakeholders: craftsmen, architects, academics, representatives of professional organizations, NGOs and associations, and elected representatives.

**France appears to be lagging behind on its energy renovation targets**, even though it has a larger stock of buildings to renovate than other European countries that have designed their



housing differently, notably the Scandinavian countries. The players interviewed shared the view that the renovation sector had long been neglected in favor of new construction and had not been perceived as a real market. As a result, professionals (craftsmen, architects) have for many years specialized in the new-build market.

This is reflected in:

- **A recognition of the need to speed up energy renovation, but a lack of a shared global vision for its implementation;**
- **A consensus on the priorities for energy renovation, in particular on the relevance of comprehensive renovations, and on the major role of the building envelope and insulation in particular, while opinions diverge on the question of induced costs and benefits;**
- **Widespread awareness and proactive public policies, but persistent obstacles such as perceived costs and the availability and skills of professionals in particular.**

However, a fundamental transformation seems to be underway. For most of those interviewed, **it's clear that energy-efficient renovation is still in its infancy. To accelerate the pace, the main levers identified by respondents are processes and best practices to be systematized, organization and industrialization of the sector, and support for homeowners.** Public policies have taken up these issues, with the MaPrimeRénov' scheme and the EduRénov' program.

### **In addition to the Barometer, other work done by the Sustainable Construction Observatory**

Besides the Sustainable Construction Barometer, the Sustainable Construction Observatory, launched in 2023, is also structured around international meetings, the Sustainable Construction Talks, bringing together all players in the sector, and a digital media, Constructing a Sustainable Future.

In 2023, three Sustainable Construction Talks were organized by the Observatory: the first, in Paris, dedicated to the question of energy renovation in Europe; the second, during the Climate Week in New-York, devoted to the challenges of adapting to climate change; and a final one in Dubai, on the occasion of COP28, on the theme of sustainable construction in the Global South.

### **A complex reality that goes beyond simple geographical logic**

While there is now a real and shared awareness of the challenges of sustainable construction within the construction industry, the reality of sustainable construction is not homogeneous. Different issues, different representations of sustainable construction, different regulatory requirements and access to funding... The reality varies from one geographic zone to another. There is a clear divide between different regions of the world, such as between the Global South and developed countries. There are also contrasts within the same regions. In addition to geographical disparities, there are economic and social factors. It is therefore important to make sustainable construction accessible to all.

### **These findings point to 5 areas of work for the Observatory**

1. **Funding and risk coverage:** how to facilitate investment in sustainable construction and energy renovation, and strengthen the role of the insurance system in adapting to climate change?
2. **Adaptation and resilience:** sustainable construction is still largely viewed in terms of climate change mitigation. But the issue of transition in the sector also involves adaptation and resilience.

# PRESS RELEASE

April 23, 2024



How to ensure greater consideration of adaptation and resilience, in a context where sustainable construction is still often considered in terms of climate change mitigation?

3. **Inclusion and accessibility:** how to remove social and economic barriers to sustainable construction and energy renovation?

4. **Human resources and skills:** how to accelerate knowledge sharing and skills development in the field of sustainable construction?

5. **Global and local:** how to combine international alignment with local specificities?

The Sustainable Construction Observatory will continue to reflect on these issues in 2024, working with all players in the sector to help identify solutions and implement them.

<sup>1</sup> Survey conducted by the CSA research institute between December 11, 2023 and January 31, 2024, among a sample of 1,760 respondents aged 18 and over from 22 countries - compared with 10 countries last year (Argentina, Brazil, Canada, Colombia, Czech Republic, Egypt, Finland, France, Germany, India, Italy, Mexico, Poland, Portugal, South Africa, Spain, Switzerland, Turkey, United Arab Emirates, United Kingdom, United States, Vietnam). The panel of respondents included elected representatives, professionals, students and members of associations involved in construction, building, ecological transition, housing, energy...

<sup>2</sup> Trend calculated on the basis of the 9 countries common to both editions of the survey (2023 and 2024).

## About Saint-Gobain

Worldwide leader in light and sustainable construction, Saint-Gobain designs, manufactures and distributes materials and services for the construction and industrial markets. Its integrated solutions for the renovation of public and private buildings, light construction and the decarbonization of construction and industry are developed through a continuous innovation process and provide sustainability and performance. The Group's commitment is guided by its purpose "MAKING THE WORLD A BETTER HOME".

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### PRESS RELATIONS

<b>Patricia Marie</b>	(+33) 1 88 54 26 83
<b>Laure Bencheikh</b>	(+33) 1 88 54 26 38
<b>Yanice Biyogo</b>	(+33) 1 88 54 27 96