The Sustainable Construction Observatory

BY SAINT-GOBAIN

Sustainable Construction Barometer

2025 – 3rd edition

Foreword

Benoit Bazin
Chairman and Chief Executive Officer
Saint-Gobain Group

"In a world where the housing crisis is intensifying, each construction or renovation project is an opportunity to meet the needs of populations."

By 2050, there will be 9.6 billion humans on this planet and 70% of us will live in cities. The way we build and renovate today will determine future generations' quality of life. While 50% of the buildings expected in 2050 still need to be built, 80% of those that already exist will still be in use by then. Sustainably transforming the existing built environment and designing the infrastructures of tomorrow with high standards are two inseparable imperatives. In a world where the housing crisis is intensifying, each construction or renovation project is an opportunity to meet the needs of populations while reducing the environmental impact of the sector, both in terms of carbon footprint and resource protection. According to the WHO, improving housing conditions can save lives, prevent disease, increase quality of life, reduce poverty, help mitigate climate change, and contribute to achieving the Sustainable Development Goals (SDGs). There is therefore an urgent need to move forward.
As the industry accounts for almost 40% of CO2 emissions, consumes 50% of natural resources, and generates 40% of solid waste, its transformation toward ever more sustainable construction also has the power to shift the environmental balance.

To do so, mobilizing all stakeholders in the sector is essential. It is in this spirit that Saint-Gobain created the Sustainable Construction Observatory. To unite the value chain, we must first identify priority fields of action for everyone to act on together, which is why the Observatory produces an annual international Sustainable Construction Barometer. Its 3rd edition now covers 27 countries and has a new feature this year, a part dedicated to citizens, giving residents a voice in the sustainable construction debate. This Observatory gives us the opportunity to listen to those who build and inhabit the world.

The findings are clear: it's time to act. But for sustainable construction to prevail, we need to improve our understanding of it and it must become part and parcel of the expectations of both the general public and professionals. Beyond its environmental impact, its concrete benefits in terms of comfort and well-being must be better highlighted. To achieve this, it is essential we take an approach that is both global and also adapted to specific local requirements. This year, sector stakeholders particularly emphasize the growing role of resilient construction in the face of climatic hazards, particularly in emerging countries. Moreover, financial profitability remains a decisive lever. Convincing professionals and citizens to accelerate this transition requires a clear demonstration of its financial benefits: reduced energy costs, increased property value, lower repair expenses, positive health impacts, climate resilience, and insurability.

These issues are critical for accelerating the industry's transformation and effectively guiding collective efforts. **The time for action is now**.

The Sustainable Construction Observatory

BY SAINT-GOBAIN

The construction sector is at the heart of the major challenges shaping our future, standing at the crossroads of demographic, social, energy, and climate issues that human communities face. These challenges cannot be met without the sector accelerating its transformation towards ever more sustainable construction: a built environment that positively contributes to people's health and well-being, is resilient to climate hazards, low in carbon emissions, and provides accessible housing for all without compromising on quality and performance.

This transition requires the collective mobilization of all stakeholders—professionals, institutions, and citizens. This is why Saint-Gobain launched the Sustainable Construction Observatory in 2023, positioning itself as a leading company, both a pioneer and a driving force as a pioneering and driving force to accelerate sustainable construction worldwide by bringing together all stakeholders.

LISTEN

The Observatory analyzes the state of sustainable construction around the world. It examines perceptions and identifies barriers, levers for progress, planned solutions, and key players. It provides a measure of progress and helps us identify the best areas to focus our collective efforts.

The Sustainable Construction Observatory produces an annual international Barometer, shared with stakeholders and the general public.

INFORM

The Observatory brings together knowledge, experience and analyses of sustainable construction, covering both challenges and potential solutions. Its purpose is to inform stakeholders parties and support decision making.

The Sustainable Construction Observatory has launched a media, *Constructing a Sustainable Future*. This magazine explores all aspects of sustainable construction, including environmental and social impacts, and showcases innovative solutions and inspiring projects.

UNITE

The Observatory unites players from across a fragmented international market, including construction professionals, institutions, and members of the general public.
It promotes the sharing of ideas and best practices and contributes to the development and implementation of new solutions.

The Sustainable Construction Observatory holds *"Sustainable Construction Talks"*– frequent international meetings at major multilateral events, as well as at national level.

METHODOLOGY

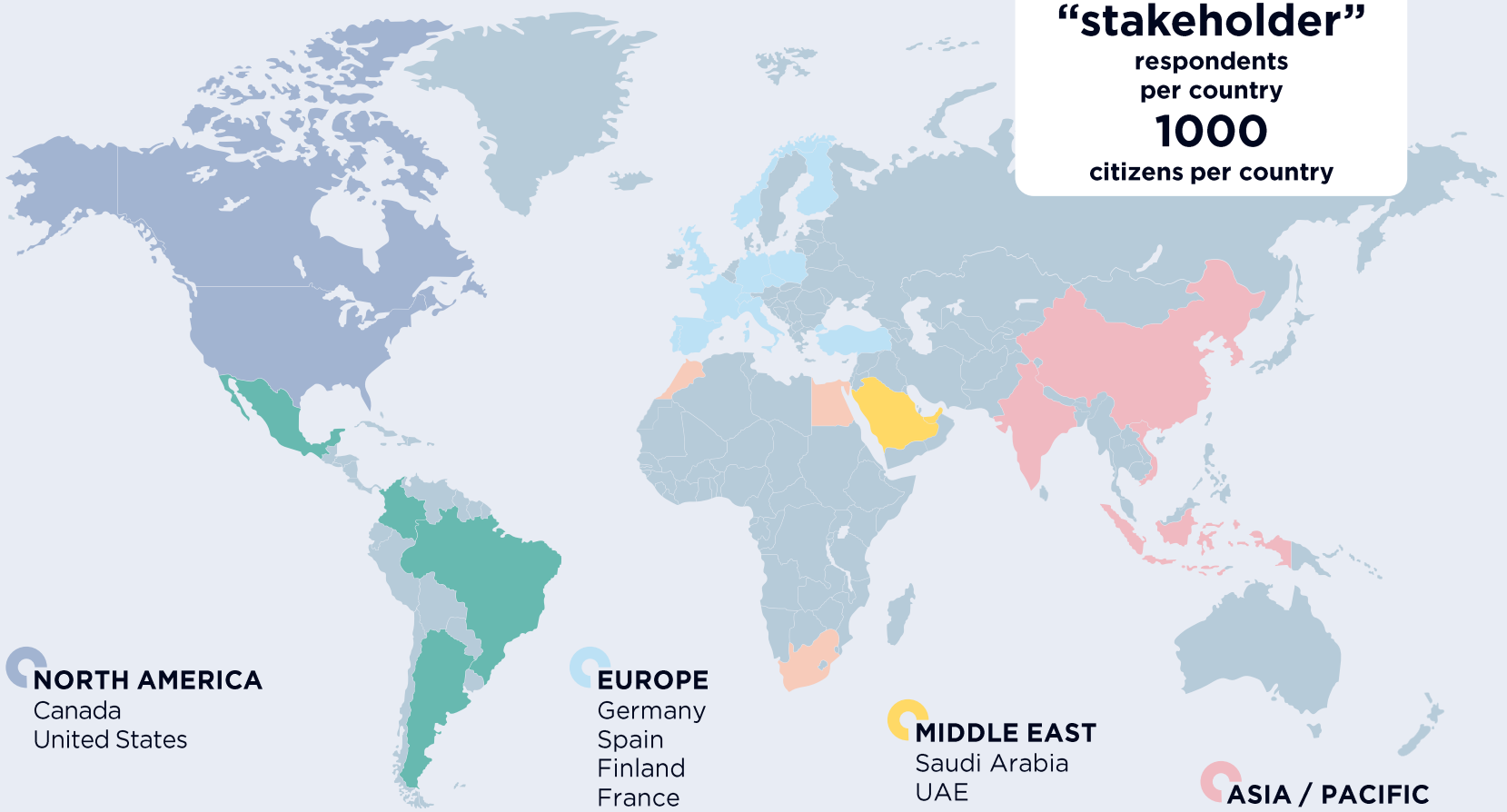
This study was carried out by Occurrence – Ifop, a study institute that has been leading the way in study methodology since 1938. The study ran from 21st October to 21st November 2024, and involved:

- A group of 4320 individuals from the "stakeholder" target pool, aged 18+, from 27 different countries. This group included:
  - 1350 professionals from the construction, civil engineering, architecture, environment, eco-design, housing, and related sectors
  - 1350 students of construction, civil engineering, architecture and spatial design
  - 1080 members of associations focusing on ecological transition, housing, construction, energy, etc.
  - 540 elected local officials (in the UAE and Saudi Arabia, where there are no elected local officials, we surveyed local government representatives)
- A sample of 27000 citizens, aged 18+, representative of the population in which they live.

All of the analyses presented below have been validated by the Occurrence – Ifop study institute.

As this is a barometric study, results will be compared to those from the previous edition (2024 barometer).

160
"stakeholder"
respondents per country
1000
citizens per country



NORTH AMERICA
Canada
United States

LATIN AMERICA
Argentina
Brazil
Colombia
Mexico

EUROPE
Germany
Spain
Finland
France
Italy
Norway
Poland
Portugal
Czechia
United Kingdom
Switzerland
Türkiye

MIDDLE EAST
Saudi Arabia
UAE

AFRICA
South Africa
Egypt
Morocco

ASIA / PACIFIC
China
India
Indonesia
Vietnam

Survey method:
Telephone questionnaire for elected officials
Self-administered online questionnaire, run via social networks, for students, members of associations and professionals
Online omnibus questionnaire for the general public

KEY TAKEAWAYS

SUSTAINABLE CONSTRUCTION: Greater awareness, a shared sense of urgency, and strong public support.

67% of stakeholders state that they are familiar with the concept of sustainable construction, an increase of 6 points on last year's results (with a notable 32-points increase among elected officials). There is a strong feeling of urgency around implementing sustainable construction practices, with 69% of stakeholders viewing it as a priority. **This stable result is further supported by responses from the general public**: 60% see sustainable construction as a priority, while 95% see it as at least "important".

The challenge now is to build on stakeholder and public awareness to achieve concrete action, ensuring that no region falls behind.

It is important to note regional variations in the desire to move forward. The results from the United States warrant further attention: 34% of public respondents are unaware of the concept of sustainable construction. A record 11% of stakeholders and 9% of public respondents, the second-highest level worldwide, see sustainable construction as a secondary issue.

There is a general, shared desire to go further. Across the board, private actors are seen as the most legitimate driving force, though regional priorities differ

There is a general consensus that sustainable construction needs to be accelerated, with 87% of respondents saying that we "need to do more" in this area. For this, players involved in the design phase, situated high up the value chain, are seen as a crucial driving force for sustainable construction: according to 56% of stakeholder respondents, architects and engineering firms have the greatest legitimacy to lead the implementation of this transition, followed by private companies in the construction sector (44%).

However, there is a wide regional variation in priorities. In Asia-Pacific, Africa and the Middle East, adapting buildings to natural and climatic hazards is frequently stated as a concern, while in Latin America, the use of ecological materials is considered to be a key issue. In Europe, we see a particularly strong interest in building renovation, while the question of affordability is more prominent in North America. **These regional differences highlight the need to adapt sustainable construction strategies to local conditions, while maintaining a strong global dynamic.**

While findings reveal diverse and highly localized perspectives, one may question a potential risk of waning interest in sustainable construction in Europe, barely a year after the Déclaration de Chaillot: Europe is indeed the only region Indeed, it is the only region where a notable share of respondents (8%) believe that we should "go backward" on sustainable construction, with several countries exceeding 10% on this indicator (France, Czech Republic, Poland, Portugal, Turkey). Though this trend is marginal, it still warrants attention.

Sustainable construction remains focused on the environment, but resilience is gaining ground, while residents' well-being remains secondary

Stakeholder understanding of sustainable construction has improved, but respondents still primarily associate these practices with environmental issues. The main criteria used to define the concept remain the same: energy efficiency of buildings (35%, down 7 points) and the use of ecological materials (31%, stable).

However, **resilience to climatic events is increasingly seen as an important issue**. This area presents the strongest increase on previous results, reaching 21%. The focus on resilience varies from region to region. Resilience is the main concern in Africa (35%) and Asia-Pacific (32%) and takes second place in the Middle East (33%), probably due to greater exposure to climatic challenges in these areas.

Surprisingly, **the "human" dimension of sustainable construction is still struggling to gain ground and remains a secondary concern**. Only 15% of stakeholders and 15% of public respondents associate sustainable construction with improved occupant well-being, despite its potential to drive acceptance and implementation.

Aware but insufficiently trained stakeholders: an obstacle to concrete commitments?

While stakeholders claim to be familiar with sustainable construction, only 28% feel they fully understand what it entails, and just 35% of professionals have received specialized training.

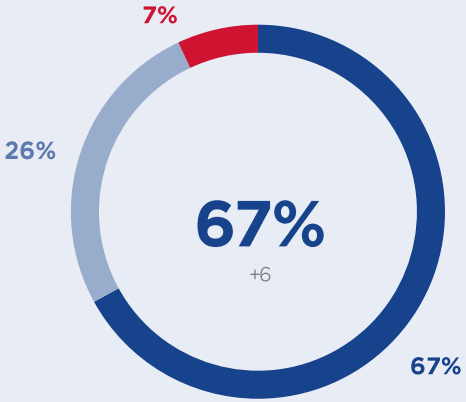
This still limited proficiency in the subject may help explain the limited concrete commitments in the field. 78% of students consider training in sustainable construction to be a differentiating factor in the job market, but only 40% would refuse an offer from a non-committed company (5% categorically). 67% of professionals say that they evaluate the carbon footprint of their sustainable construction projects, but only 30% do so systematically: this result, while better than last year, remains low.

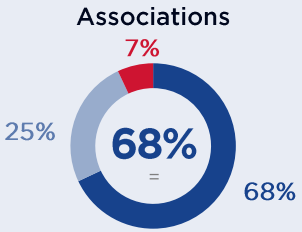
51% of elected officials say they want to exclude from public construction contracts projects that do not take into account sustainable construction methods, but only 37% have actually taken action — a result whose significant increase (+26 points) nonetheless represents an encouraging signal.
This intention-action gap highlights the difficulty in transforming awareness into concrete action.

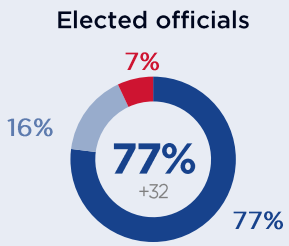
Awareness, understanding, and perceived importance of sustainable construction

AWARENESS CONTINUES TO PROGRESS, WITH SOME VARIATION

Are you familiar with or have you heard of the concept of sustainable construction?







AREA FOCUS

				Know what it's all about
AFRICA**	65%	26%	9	65% =
NORTH AMERICA**	67%	27%	6	67% +16
LATIN AMERICA**	64%	25%	11	64% =
ASIA-PACIFIC**	59%	34%	7	59% +15
EUROPE**	71%	24%	5	71% +7
MIDDLE-EAST**	79%	17%	4	79%

UNITED KINGDOM	60%	31%	9%	60%
CZECH REPUBLIC	50%	37%	13%	50%
TÜRKIYE	44%	43%	13%	44%

Yes, and I know exactly what it is about
Yes, but I don't really know anything about it
No, I've never heard of it

Base: all stakeholders (4320 respondents) – Only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

An increasing number of stakeholders claim to be familiar with the concept of sustainable construction: 67% claim to understand it clearly, and 93% of respondents are aware of the concept.

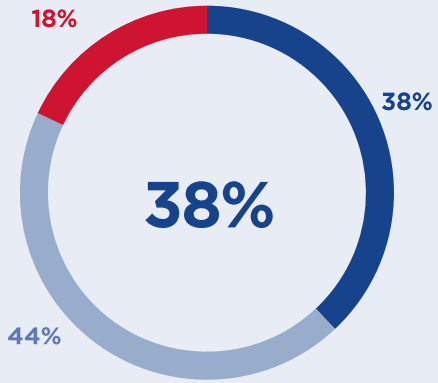
There is a notable increase in awareness at global level (+6 pts), with particularly strong advances in Asia-Pacific (+15 pts on the "I know exactly what it is about" indicator), although this region still lags behind the rest of the world in terms of sustainable construction knowledge.

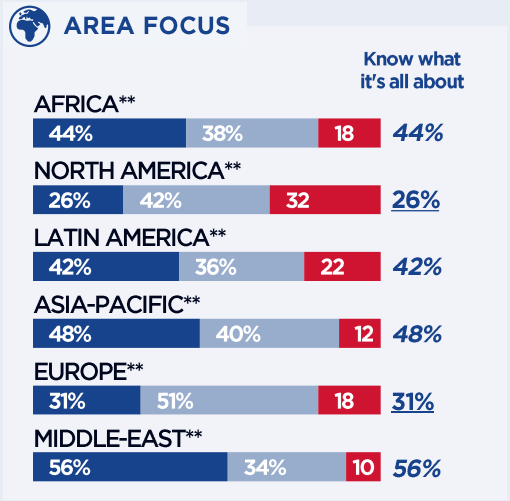
Familiarity with the topic has grown significantly among associations and even more among elected officials, who report more complete understanding than in previous years.

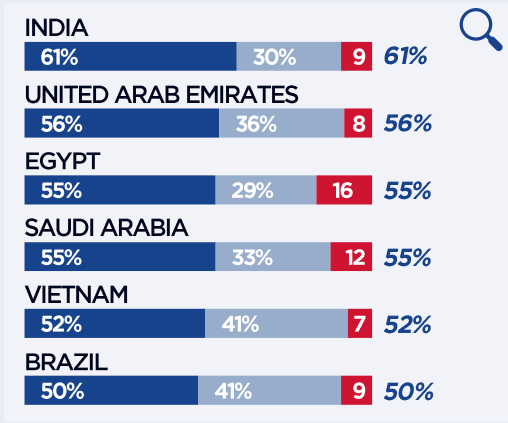
Note that a significant number of participants from three European countries, namely the UK, Czechia and Türkiye, say that they "don't really know anything about" or "have never heard of" sustainable construction, and awareness in these countries is below the global average.

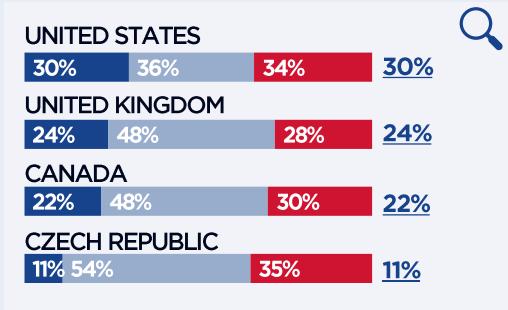
LIMITED AWARENESS AMONG THE GENERAL PUBLIC, WITH EUROPE AND NORTH AMERICA LAGGING BEHIND

Are you familiar with or have you heard of the concept of sustainable construction?









Yes, and I know exactly what it is about
Yes, but I don't really know anything about it
No, I've never heard of it

Base: all citizens (27 000 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

82% of public respondents worldwide say they have heard of sustainable construction, but only 38% say that they "know exactly what it is about" .

Awareness varies greatly by region, with Europe (31%) and North America (26%) clearly lagging behind the rest of the world. Awareness is highest in the Middle East (56%) and Asia-Pacific (48%).

This trend continues to play out at country level: in six countries (India, UAE, Egypt, Saudi Arabia, Vietnam and Brazil), more than half of public respondents declare that they have a strong grasp of the concept.
The lowest rates of awareness were found in the UK (24%), Canada (22%), and Czechia (11%). To be noted that, in the United states, 34% of public respondents are unaware of the concept of sustainable construction, the second-highest level worldwide.

WIDE VARIATION IN UNDERSTANDING OF SUSTAINABLE CONSTRUCTION, RESILIENCE MAKES GAINS IN AFFECTED ZONES, OCCUPANT HEALTH REMAINS A SECONDARY CONCERN.

Which of the following definitions best fits sustainable construction? Construction...

	First	Total	Evol.	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE-EAST**
energy efficient construction	18%	35%	-7	34%	33%	42%	26%	36%	39%
using ecological materials	16%	31%	=	25%	19%	*48%*	27%	33%	17%
aimed at achieving carbon neutrality	17%	29%	-4	20%	35%	19%	22%	*37%*	21%
evolutive construction capable of adapting to new uses	11%	22%	+4	23%	15%	16%	20%	*23%*	*33%*
able to withstand natural and climatic hazards*	11%	21%	+8	*35%*	24%	17%	*32%*	13%	*33%*
aimed at reducing building waste	9%	19%	=	20%	23%	21%	*26%*	16%	16%
that uses fewer exhaustible materials	9%	19%	=	15%	24%	13%	15%	*23%*	16%
that promotes the well-being and health of occupants	7%	15%	=	17%	16%	16%	*24%*	12%	15%

Base: stakeholders familiar with the concept of sustainable construction (4031 respondents) - two possible answers

* Item slightly changed.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Stakeholder definitions of sustainable construction focus on environmental rather than social dimensions: energy efficiency of buildings tops the list of proposed definitions (35%, down 7 points), followed by the choice of ecological materials (31%, stable). This aspect is particularly prominent in Latin America, where it comes out well ahead of the other options (48%) .

Worldwide, carbon neutrality takes third place (29%), but in Europe, this consideration comes in first (37%).

Resilience to climate hazards is seen as a secondary concern on the global scale, but its perceived importance has grown since the last edition to reach 21% (+8 points). The priority accorded to this criterion shows strong regional variations: it ranks first in Africa (35%) and Asia-Pacific (32%), in second in the Middle East (33%), very probably due to the fact that these regions are more exposed to climate-related challenges.

Finally, occupant health remains in last position (15%) and is still only a marginal concern for stakeholders.

FOR THE GENERAL PUBLIC, SUSTAINABLE CONSTRUCTION IS PRIMARILY DEFINED BY THE USE OF ECOLOGICAL MATERIALS AND ENERGY EFFICIENCY.

Which of the following definitions best fits sustainable construction? Construction...

	First	Total	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE-EAST**
using ecological materials	21%	38%	19%	27%	57%	29%	46%	19%
energy efficient construction	17%	34%	25%	26%	29%	22%	43%	30%
able to withstand natural and climatic hazards*	13%	23%	38%	20%	22%	34%	15%	31%
aimed at achieving carbon neutrality	11%	22%	14%	27%	13%	20%	27%	20%
aimed at reducing building waste	10%	21%	25%	32%	21%	25%	15%	29%
that uses fewer exhaustible materials	10%	20%	16%	27%	17%	18%	21%	20%
that promotes the well-being and health of occupants	7%	15%	20%	14%	14%	23%	11%	18%
evolutive construction capable of adapting to new uses	7%	14%	25%	11%	13%	19%	10%	20%

First Total

Base: citizens familiar with the concept of sustainable construction (22 071 respondents) - two possible answers

* Item slightly changed.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

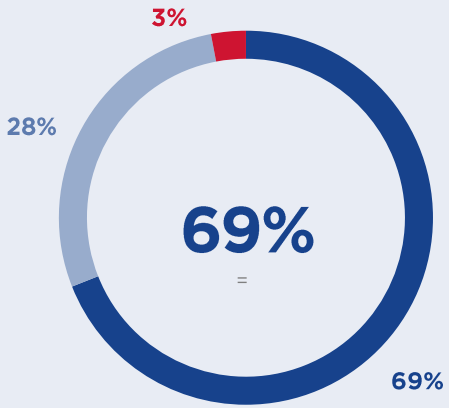
Stakeholder and public definitions of sustainable construction are broadly aligned, with identical elements in first and second place.
Members of the public primarily associate sustainable construction with the use of ecological materials (38%). This result is driven by particularly high figures in Latin America (57%) and Europe (46%). Results from European countries have also buoyed up energy efficiency in the rankings (43% in Europe, 34% overall).

Members of the public once again agree with stakeholders on the subject of climate resilience, with 38% of respondents in Africa, 34% in Asia-Pacific and 31% in the Middle East considering it a priority, doubtless due to the increased visibility of climate-linked challenges in these reasons.

Few respondents see occupant health and well-being as a significant aspect of sustainable construction (15%).

SENSE OF URGENCY MAINTAINED, BUT CONTRASTING VIEWS EMERGING

In your opinion, would you say implementing more sustainable construction is...?



AREA FOCUS

				Total priority
AFRICA**	71%	28%	1	71% =
NORTH AMERICA**	71%	22%	7	71% =
LATIN AMERICA**	74%	25%	1	74% =
ASIA-PACIFIC**	71%	28%	1	71% =
EUROPE**	65%	30%	5	65% =
MIDDLE-EAST**	66%	33%	1	66%

				Focus Total secondary
TÜRKIYE	71%	21%	8	8%
NORWAY	66%	25%	9	9%
UNITED STATES	73%	17%	11	11%
POLAND	52%	37%	11	11%
CZECH REPUBLIC	40%	49%	11	11%

A priority Important but not a priority Of secondary importance

Base: all stakeholders (4320 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Almost 7 in 10 respondents consider implementing sustainable construction as a priority, with 97% stating it to be at least “important”, marking a 2-point increase.

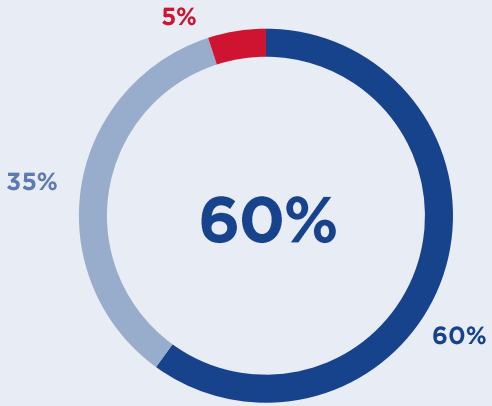
This priority is widely recognized worldwide, with particularly strong results from Latin America. The sense of urgency is lower in Europe (65% consider it a priority).

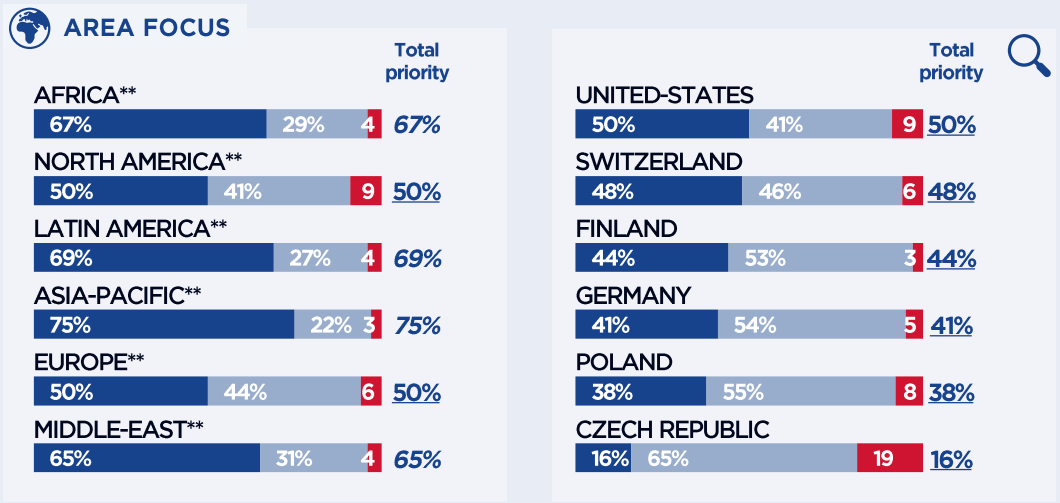
More generally, the number of respondents considering sustainable construction to be “of secondary importance” exceeded the global average in several European countries (Türkiye, Norway, Poland and Czechia), showing greater contrast in perceptions.

Responses from the USA were more polarized, with “A priority” and “Of secondary importance” taking the top spots.

GENERALIZED PUBLIC SUPPORT FOR SUSTAINABLE CONSTRUCTION , MIXED RESULTS IN EUROPE AND NORTH AMERICA

In your opinion, would you say implementing more sustainable construction is...?





A priority Important but not a priority Of secondary importance

Base: all citizens (27 000 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

The general public shares stakeholders' views of the need to act: a high proportion (60%) of public respondents consider more sustainable construction to be a priority.

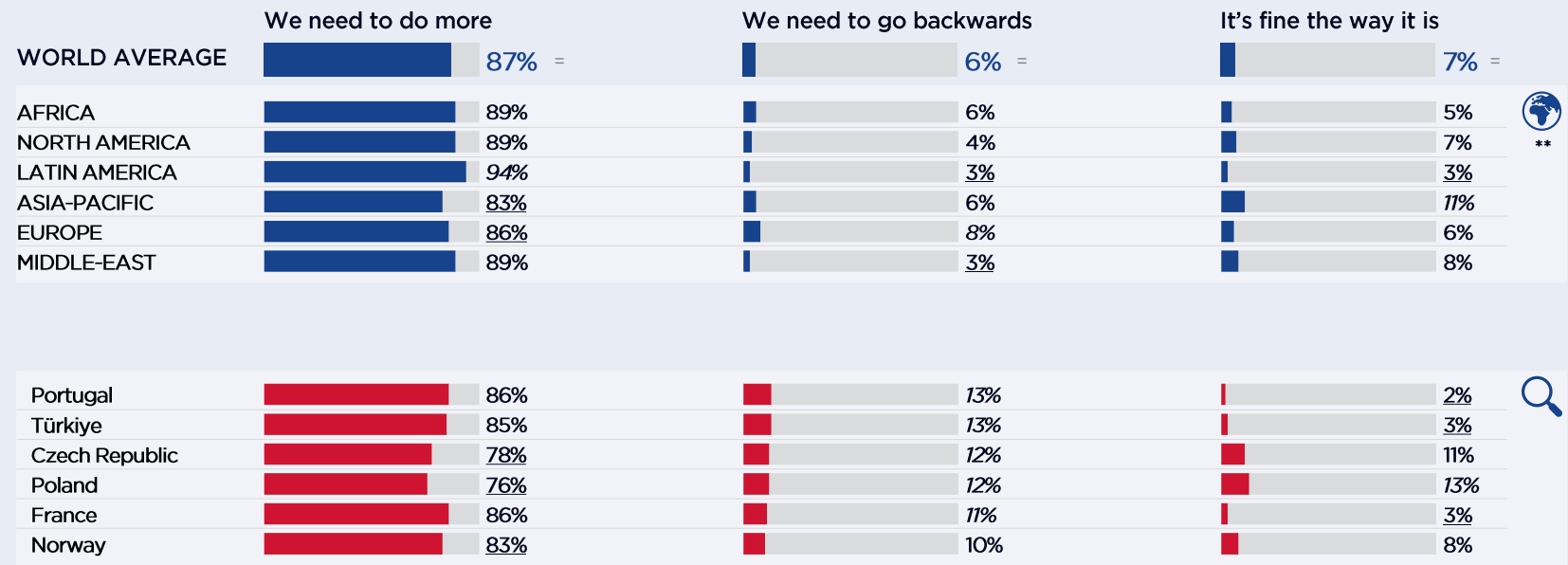
However, as with stakeholders, these overall results conceal wide regional variations, with North America and Europe lagging behind (50% "priority" in both regions)

All countries where "priority" scored 50% or less fall into these two regions: the United States (50%), Switzerland (48%), Finland (44%), Germany (41%), Poland (38%), and Czechia, where the score is a mere 16%.

Taken alongside previously-observed trends in Europe and North America, this reduction might suggest that people are "tiring" of the sustainable construction question.

A SHARED DESIRE TO GO FURTHER, BUT ENTHUSIASM REMAINS UNEVEN

When it comes to sustainable construction, would you say...?



Base: all stakeholders (4320 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

The proportion of stakeholders considering that we need to go further in terms of sustainable construction remains high (87%) but remains unchanged from the previous edition.

As mentioned earlier, this stagnation may show a certain "weariness" with regard to ecological issues, notably in Europe (particularly Portugal, Türkiye, Czechia, Poland, and France). In light of these findings, presenting sustainable construction as a desirable opportunity rather than an imperative is key.

Latin American respondents displayed a stronger commitment: 94% of respondents in the region want to go further on the topic of sustainable construction.

Objectives and priorities for action

"GREEN" OBJECTIVES CONTINUE TO DOMINATE, WHILE OBJECTIVES BASED ON INDIVIDUAL NEEDS REMAIN A MINOR CONCERN ARE STILL A MINORITY CONCERN

What do you think should be the main goal of sustainable construction?

		Evol.	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE – EAST**
Environmental protection	39%	+4	38%	32%	50%	41%	34%	49%
The fight against climate change	22%	=	18%	26%	22%	15%	26%	14%
Energy savings	15%	=	15%	12%	12%	14%	18%	14%
Adapting buildings to natural and climatic hazards	12%	+7	18%	13%	7%	18%	9%	15%
Occupant health	7%	-3	8%	8%	5%	6%	8%	7%
More affordable costs	5%	-6	4%	10%	3%	6%	6%	2%

Base: all stakeholders (4320 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Stakeholders consider environmental objectives to be a high priority in sustainable construction: environmental protection ranks first with 39% (a slight increase), followed by the fight against climate change (22%).

Economic issues are considered to be of minor importance: 15% of respondents cited reducing energy expenditure as a main objective, and only 5% cited lowering costs.

Only 7% mentioned occupant health (a slight reduction on last year) with no significant regional variations.

This imbalance highlights the potential challenges of a more needs-based approach to sustainable construction, focused on the health, security, comfort, and even finances of inhabitants.

TWO MAJOR CHALLENGES: DEVELOPING COMPETITIVE SUSTAINABLE SOLUTIONS AND RAISING PUBLIC AWARENESS

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE-EAST**
Make sustainable materials, products and solutions more competitive	33%	=	39%	34%	30%	32%	33%	38%
Raise public awareness of the challenges of sustainable construction	32%	=	43%	28%	38%	39%	24%	*48%*
Raise awareness among all stakeholders and strengthen their collaboration	31%	+5	33%	33%	35%	33%	27%	37%
Prioritize the use of bio-materials over conventional materials*	28%	+8	32%	26%	27%	*36%*	26%	26%
Make the sustainable performance of constructions more visible and transparent	26%	+7	32%	25%	25%	30%	21%	*39%*
Propose new innovative solutions	22%	=	27%	16%	23%	23%	19%	33%
Train professionals more	21%	=	17%	25%	*26%*	20%	22%	6%
Renovate existing buildings	18%	=	12%	19%	7%	12%	*26%*	13%

Base: all stakeholders (4320 respondents) - multiple ranked answers possible

* Item slightly changed.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

One in three stakeholder respondents considered increasing the affordability of sustainable solutions and raising public awareness to be major priorities in accelerating the development of sustainable construction.

Notably, raising awareness among the general public is seen as the top priority in Africa (43%), the Middle East (48%) and Asia-Pacific (39%), regions that already boast the highest levels of public awareness of sustainable construction, with scores above the global average (44% of public respondents in Africa, 48% in Asia-Pacific and 56% in the Middle East say they “know exactly what it is about”).

REDUCED INTEREST IN PUBLIC INITIATIVES AMONG STAKEHOLDERS

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		Evol.	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE – EAST**
Move towards more regulation	12%	-3	8%	18%	*20%*	12%	10%	8%
Establish regulations to help increase energy renovations*	11%	=	-	-	-	-	*24%*	-
Increase public aid for professionals	10%	=	11%	9%	10%	12%	10%	10%
Increase public aid for individuals	10%	-3	9%	10%	7%	8%	*13%*	7%
Prioritize collective housing	6%	=	6%	9%	6%	*10%*	5%	5%
Simplify the role of labels and certification	6%	=	6%	7%	4%	7%	6%	5%
Move towards less regulation	5%	-2	3%	8%	5%	5%	*7%*	1%

Base: all stakeholders (4320 respondents) - multiple ranked answers possible

* Item only shown in Europe.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Continuing the trend from last year, public initiatives (public aid, regulations, etc.) take last place in the list of priority actions to accelerate the development of sustainable construction.

Stakeholders still seem to see public initiatives as constraints rather than levers for acceleration.

Some interesting regional differences emerge from the data:

- European respondents display a greater interest in public aid to private individuals than the global average (13% vs. 10%);
- Collective housing is seen as a higher priority in Asia-Pacific than elsewhere (10% vs. 6% global average);
- Latin American respondents are more favorable to increased regulation than the global average (20% vs. 12%).

CITIZENS

TWO MAJOR CHALLENGES: DEVELOPING COMPETITIVE SUSTAINABLE SOLUTIONS AND RAISING PUBLIC AWARENESS

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE-EAST**
Make sustainable materials, products and solutions more competitive	32%	29%	34%	36%	39%	29%	33%
Raise public awareness of the challenges of sustainable construction	30%	40%	25%	38%	38%	22%	36%
Prioritize the use of bio-materials over conventional materials*	30%	28%	28%	30%	39%	27%	30%
Make the sustainable performance of constructions more visible and transparent	26%	29%	26%	28%	35%	21%	30%
Propose new innovative solutions	22%	24%	17%	26%	19%	22%	21%
Raise awareness among all stakeholders and strengthen their collaboration	20%	29%	18%	28%	22%	14%	25%
Renovate existing buildings	19%	16%	20%	11%	11%	25%	15%
Train professionals more	14%	17%	14%	17%	13%	14%	11%

Base: all citizens (27 000 respondents) - multiple ranked answers possible

* Item slightly changed.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

The general public and stakeholders produced similar classifications of priority actions to accelerate sustainable construction. Shared priorities include the affordability of sustainable solutions (32% vs. 33%), raising public awareness (30% vs. 32%), and prioritizing the use of biomaterials (30% vs. 28%).

Note, however, that those actions which directly impact stakeholders (stakeholder awareness, professional training) rank more highly among stakeholders than among the general public.

Renovation is mostly seen as a priority focus in Europe (25% of public respondents), a result explained by the existence of a strong, established housing stock.

PUBLIC INITIATIVES STRUGGLE TO TAKE HOLD WITH PUBLIC AND STAKEHOLDERS

In your opinion, which of the following actions should be put in place as a priority to accelerate the development of sustainable construction?

		AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE-EAST**
Increase public aid for individuals	14%	15%	14%	9%	8%	*16%*	14%
Increase public aid for professionals	10%	12%	9%	9%	8%	10%	12%
Establish regulations to help increase energy renovations*	9%	-	-	-	-	*21%*	-
Move towards more regulation	9%	6%	11%	*12%*	8%	8%	10%
Prioritize collective housing	8%	10%	12%	7%	7%	8%	9%
Simplify the role of labels and certification	7%	6%	8%	5%	7%	*7%*	8%
Move towards less regulation	6%	4%	8%	5%	3%	*8%*	5%

Base: all citizens (27 000 respondents) - multiple ranked answers possible

* Item only shown in Europe.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Members of the higher-than-average, like stakeholders, rank public initiatives (assistance and regulation) last on the list of priority actions to accelerate sustainable construction.

As with the stakeholders, this finding presents some regional nuances:

- European respondents show an interest in public assistance for private individuals above the global average (16% vs. 14%);
- Latin American respondents display a higher-than-average interest in increased regulation (12% vs. 9% globally).

These results demonstrate that public initiatives are not perceived as a priority for transition in the sustainable construction sector, among stakeholders as among the public at large, and these initiatives are broadly associated with regulatory constraints.

ARCHITECTS, BUILDING ENGINEERS, PRIVATE COMPANIES: THE MAIN PLAYERS IN TRANSITION

Which of the following do you think are the most legitimate to advance sustainable construction?

		Evol.	AFRICA**	NORTH AMERICA**	LATIN AMERICA**	ASIA-PACIFIC**	EUROPE**	MIDDLE – EAST**
Architects and building engineers	56%	=	*67%*	54%	46%	55%	55%	*75%*
Private companies in the construction sector	44%	=	47%	36%	*55%*	39%	41%	48%
Public institutions	35%	=	28%	22%	*42%*	25%	*41%*	31%
Government officials	18%	*	15%	*33%*	6%	23%	*21%*	3%
Citizens	17%	=	18%	19%	22%	21%	14%	18%
Associations	12%	+3	10%	12%	12%	*22%*	10%	9%
Tradespeople	7%	+2	6%	*13%*	5%	6%	7%	5%

Base: all stakeholders (4320 respondents) - two possible answers

*Evolution on elected officials not presented due to methodological changes.

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

Players involved in the design phase, situated high up the value chain, are seen as a crucial driving force for sustainable construction: 56% of stakeholders consider architects and building engineers to be the most legitimate players in driving the transition forward, followed by private sector companies (44%).

The dynamics vary from region to region:

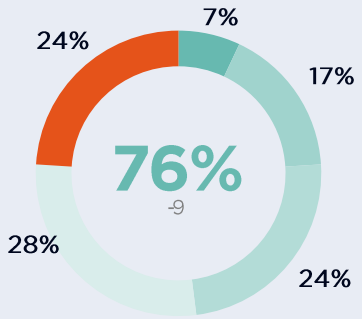
- Private companies are ranked first in Latin America (55%).
- Architects and engineering firms come in highest in Africa (67%) and the Middle East (75%).
- Public institutions come in higher in Europe than elsewhere (41% vs. 35% globally).
- Elected officials rank higher in North America than elsewhere, but public institutions lag behind (22%).
- Associations are seen to play a key role in Asia-Pacific (22%).

Tradespeople rank lowest in this area (7%).

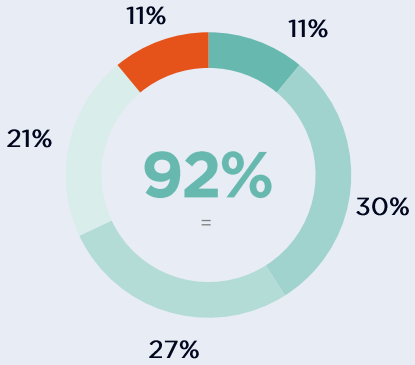
LULL IN SUSTAINABLE CONSTRUCTION EXPECTED TO BE TEMPORARY, BUT AN UNAVOIDABLE NECESSITY FOR THE FUTURE, ESPECIALLY IN ASIA-PACIFIC, AFRICA, AND THE MIDDLE EAST

Is all or part of your business in the field of sustainable construction? Within the next five years?

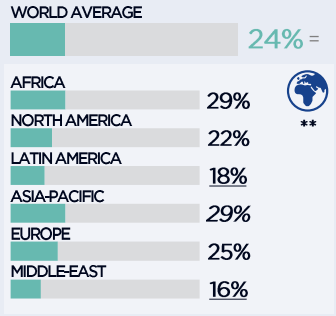
CURRENTLY



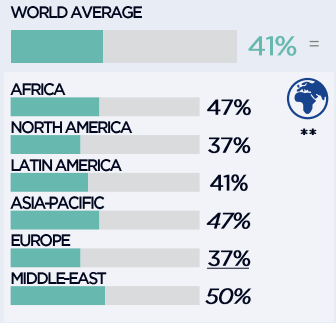
WITHIN THE NEXT FIVE YEARS



From 50% to 100% of their business



From 50% to 100% of their business over the next 5 years



Yes, all of it
Yes, more than 50%
Yes, between 25% and 50%
Yes, less than 25%
None of it is in the field of sustainable construction

Base: professionals (1350 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

76% of professionals say that some or all of their activity relates to sustainable construction, a reduction of 9 points over the previous edition, likely due to the economic slowdown seen in 2024.

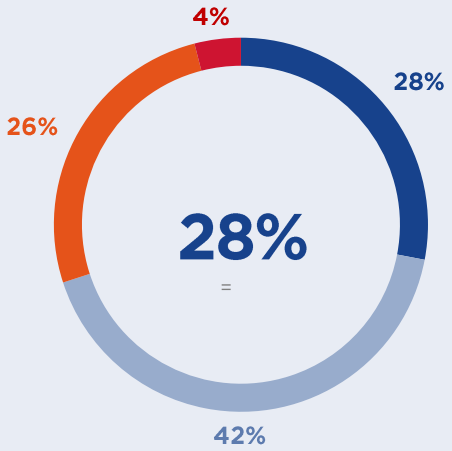
However, this slowing is likely to be temporary and sustainability is here to stay in the construction industry: 92% of professionals expect to include sustainable construction in their activities in the next five years.

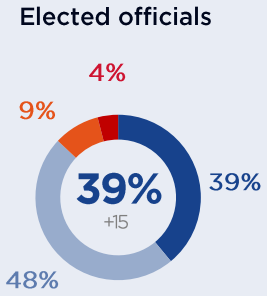
However, the level of commitment varies from region to region. In Asia, the Middle East and Africa, professionals remain committed and plan to increase their involvement, with 47%, 50% and 47% respectively planning to devote at least half of their activity to the area within five years, compared to 37% for Europe and North America.

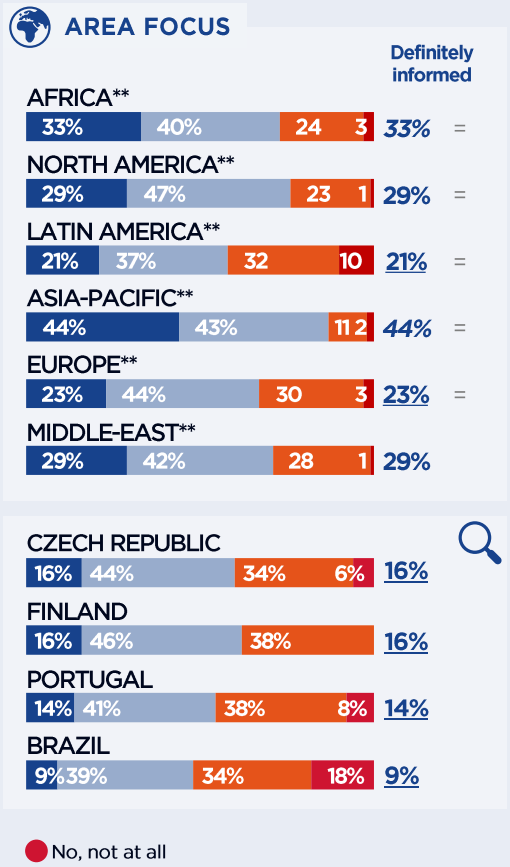
Information and training

INFORMATION LEVELS: STABLE, BUT INSUFFICIENT?

Do you feel sufficiently informed about the subject of sustainable construction?







Yes, definitely | Yes, somewhat | No, not really | No, not at all

Base: all stakeholders (4320 respondents) - only one answer possible

** See details of the countries surveyed as part of the Barometer in each region (p. 4).

While 70% of respondents consider themselves to be “informed” about sustainable construction, only 28% answered “yes, definitely”.

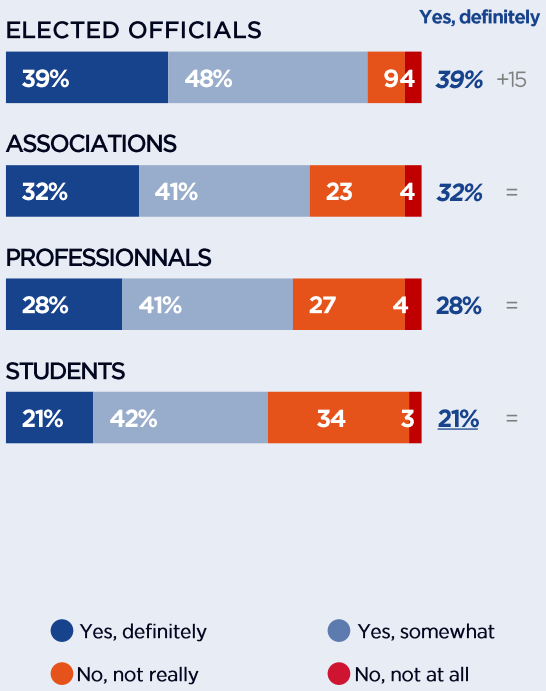
The level of information is relatively uniform across regions, but some countries present a notable lag:

- In Europe: Portugal (14%), Finland (16%), Czechia (16%).
- In Latin America: Brazil (9%).

While the sense of being informed is stable at global level, notable progression has been made among elected officials, with a figure 15 points up on the previous edition.

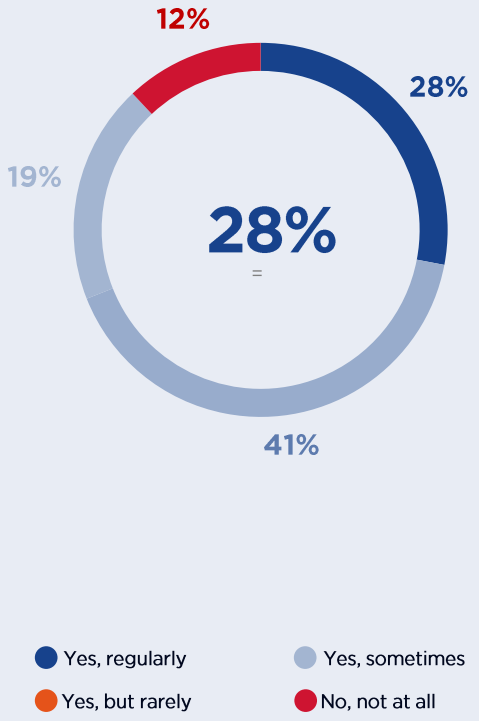
INFORM, BUT ABOVE ALL, TRAIN

Do you feel sufficiently informed about the subject of sustainable construction?



Base: all stakeholders (4320 respondents) - only one answer possible

As part of your training, do you receive lessons on the subject of sustainable construction?



Base: students (1350 respondents) - only one answer possible

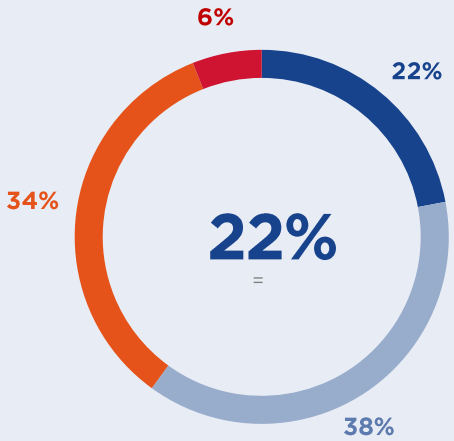
Students are the group that consider themselves least informed about sustainable construction, with only 21% answering “yes, definitely” to our question (stable). This lack of knowledge may hinder development in the sector, particularly as these future professionals are set to play a key role in transforming construction.

Raising awareness of sustainable construction is not enough: the skills needed to implement change also need to be taught and transmitted. Training provision is still insufficient, with only 28% of students receiving regular education on the subject, and little progress observed in this area.

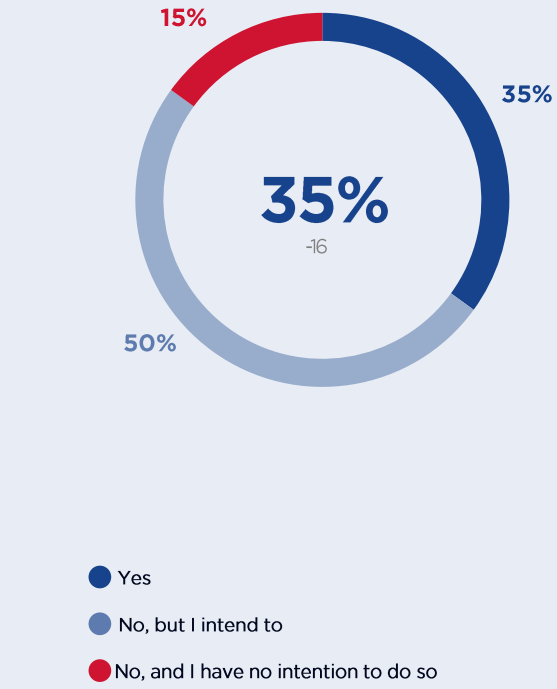
One major challenge is to integrate these themes more closely within academic courses, transforming knowledge into skills in order to accelerate transition.

PROFESSIONAL TRAINING: ROOM FOR IMPROVEMENT

And do you feel sufficiently trained about the subject of sustainable construction?



Have you been trained in sustainable construction?



Base: professionals familiar with the concept of sustainable construction (1248 respondents) - only one answer possible

Another indication that further training is needed to rise to the challenges of sustainable construction is that only 22% of professionals consider themselves to have received full training in the area; a mere 35% have received specific training, a low figure that has decreased since the last edition.

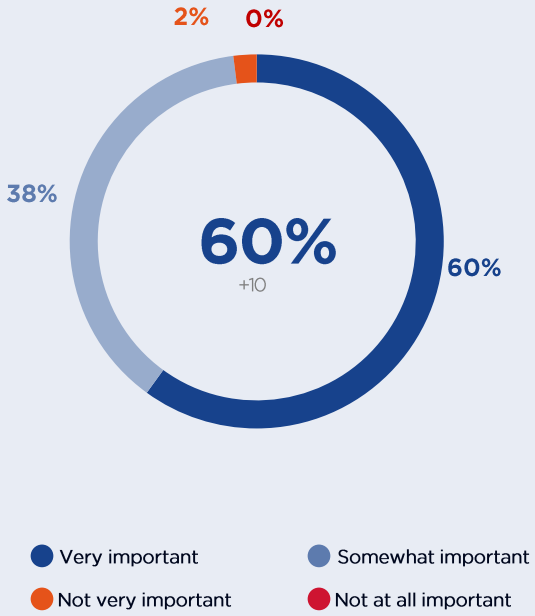
While there seems to be genuine awareness of the issues, with 50% expressing a desire for training, this feeling has yet to result in concrete action . A concrete increase in skills should result in an acceleration in the move towards more sustainable practices.

Increasing access to suitable initial or continued training courses should be a priority, enabling professionals to develop the necessary skills and to bridge the intention-action gap.

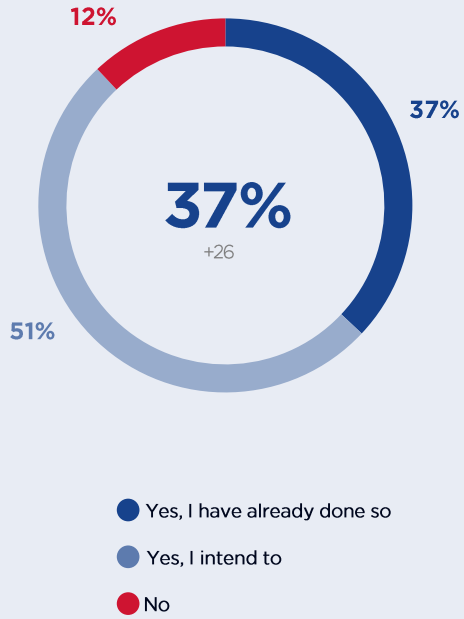
Concrete stakeholder commitments

ELECTED OFFICIALS PLACE INCREASING EMPHASIS ON SUSTAINABLE CONSTRUCTION

Today as an elected official, in relation to construction projects, is the sustainable dimension an important or unimportant criterion among those for awarding public contracts?



Are you personally prepared to exclude projects from public building/construction contracts that do not take into account sustainable construction methods?



Base: elected officials (or representative of the public authorities) (540 respondents) - only one answer possible

6 out of 10 elected officials consider sustainability to be a major criteria in awarding public construction contracts, 10 points up on the last results.

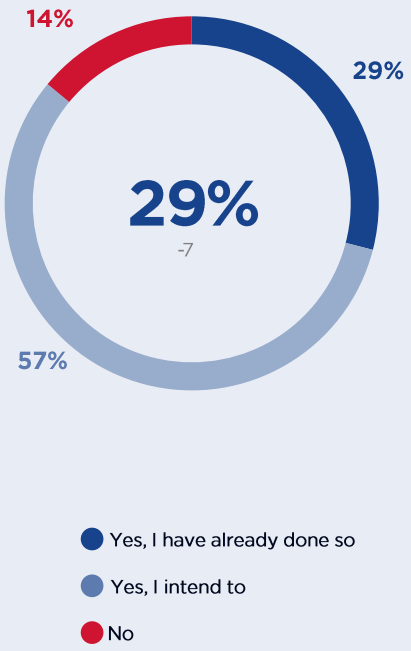
4 out of 10 elected officials (37%) have already excluded projects with no sustainability dimension from public markets, showing a marked increase on previous years.

Interestingly, among those officials who see the implementation of sustainable construction as a priority, 44% (vs. 37% of the overall group) have already excluded projects that failed to take account of sustainable construction modes from public markets.

These figures highlight the need to unite all stakeholders to bring about transition in the sector.

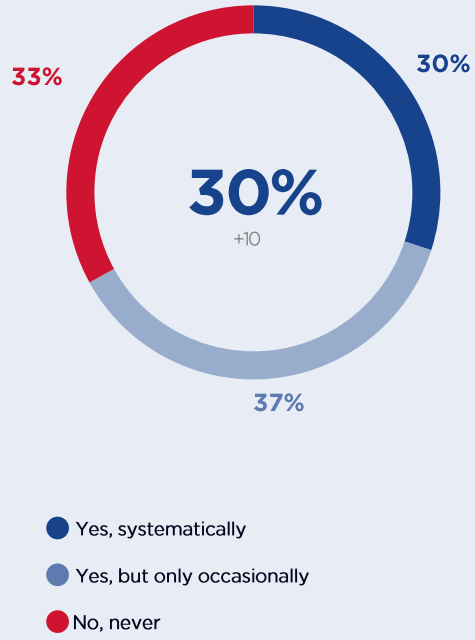
PROFESSIONALS STRUGGLE TO IMPLEMENT MORE SUSTAINABLE PRACTICES ON SITE

Are you personally prepared to do more jobs that take sustainable construction into account, regardless of the impact in terms of development time, material supply or margins?



Base: professionals (1350 respondents) - only one answer possible

Do you assess the carbon footprint of your sustainable building projects?



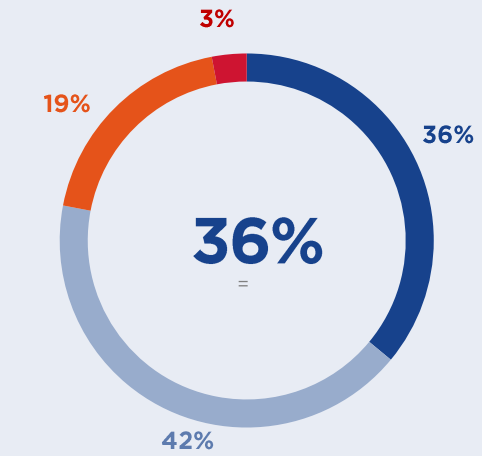
Base: professionals working in sustainable construction (1030 respondents) - only one answer possible

29% of professionals claim to have worked on sites that implement sustainable construction practices, a reduction on the previous score.

Furthermore, while 67% of professionals claim to assess the carbon footprint of their construction projects, only 30% do so systematically: this practice is progressing, but has only been adopted by a minority.

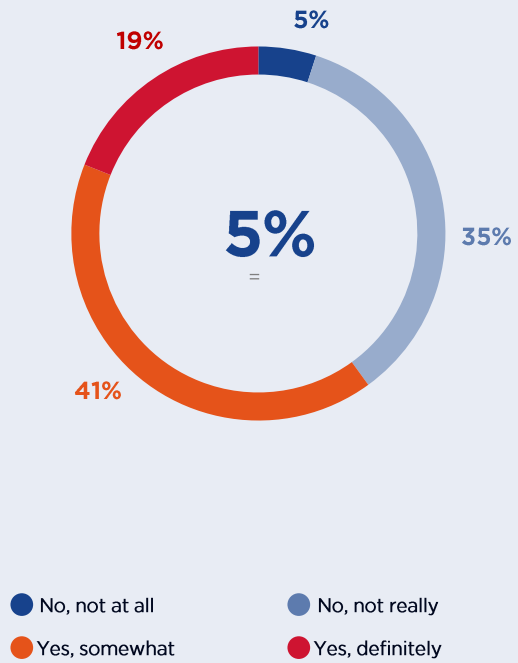
STUDENTS STRUGGLE TO FULLY ENGAGE WITH SUSTAINABLE CONSTRUCTION

In your opinion, is your training in the field of sustainable construction a criterion that could make the difference for obtaining a job?



Base: students who are taught about sustainable construction (1192 respondents) - only one answer possible

Are you personally prepared to accept a job offer at a company that is not committed to sustainable construction?



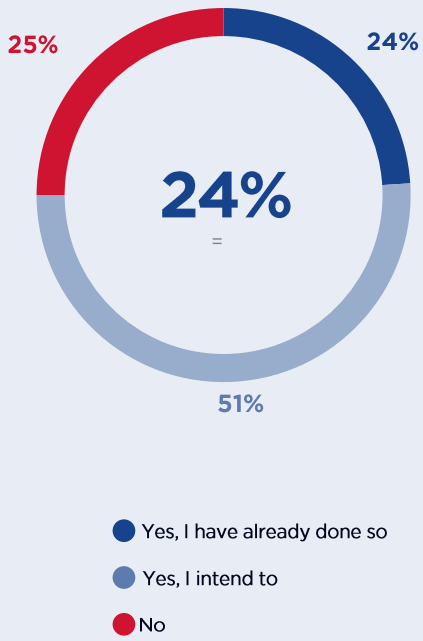
Base: students (1350 respondents) - only one answer possible

Just over one in three students (36%) consider training in sustainable construction to be a differentiating factor in the jobs market. This result is stable in relation to the previous edition.

However, while students consider sustainable construction to be a differentiating factor, only 5% would categorically refuse to work for a company that is not committed to sustainable construction.

CALLS TO BOYCOTT: MORE THEORY THAN PRACTICE FOR ASSOCIATIONS

Are you personally prepared to boycott construction companies that are not doing enough to build more sustainably?



Base: associations (1080 respondents) - only one answer possible

Finally, among respondents from associations, the lack of commitment to sustainable construction is seen as a prohibitive factor: 3 out of 4 respondents say they would be willing to call for a boycott of construction companies that do not make sufficient efforts in the field of sustainable construction.

However, note that only 24 % of these associations have already called for a boycott, demonstrating a significant intention – action gap.

ACKNOWLEDGMENTS

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To find out more and to read the 2025 edition of our Barometer, visit the Sustainable Construction Observatory page at:
https://www.saint-gobain.com/en/sustainable-construction-observatory

For a more in-depth look at sustainable construction and its acceleration levers, please visit our media, *Constructing a Sustainable Future*:
https://www.constructing-sustainable-future.com/en/home

The Sustainable Construction Observatory

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