

THE

Living Standard
U.S. Public Research
Report

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The first in a series focusing on
the power of storytelling
for sustainability.

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LETTER FROM THE CEO



Dear Friends,

A month before last year's Greenbuild, the UN's IPCC released its findings, issuing

a dire warning about an immediate need for the world to drastically reduce greenhouse emissions by 2030.

The report attracted international headlines — and it was, of course, at the top of my mind when speaking to USGBC's global community this past November in Chicago.

How could it not be? 2030 is only eleven years from now. That's less than half the time that USGBC has existed. It means that children born today will only make it to elementary school before having to deal with the inevitability of catastrophic conditions.

The IPCC report further crystallized for me the impact and timing of our own public opinion research initiative. When the report was released last fall, we were midway through our own Living Standard research initiative. Across five regions of the U.S., we convened focus groups among a wide range of communities with two primary goals in mind: to better understand the disconnect between the story of green building and the average American, and to learn whether telling a better story could provide the sense of urgency needed to improve every human being's quality of life.

What we've just begun to understand—and I can tell we've barely scratched the surface—is how many people out there have a unique perspective on sustainability, and how many people we still have yet to reach.

What we've also learned from leaders like LK Policy Lab President Laurie Kerr is that when people think about emissions, they think about cars, power plants, and industries.

They rarely think about buildings.

For some people, buildings are merely aesthetically fulfilling. They're something to marvel at. And for others, they, of course, have an important daily purpose—as a place to live and work.

But while the look and logic of buildings tend to be at the forefront of our minds, their long-term impact on our well-being is not. And until that becomes our reality, we still have a messaging mountain to climb.

That's because you can't solve a problem that isn't on your radar.

And if you don't understand or know what a LEED-certified building is, let alone what it can do for you and the people you love, then you definitely don't know that it's an advantage in the face of the daunting global challenges ahead of us.

For over a quarter century now, USGBC has worked to prove that buildings are very much living entities that, if created with forethought and compassion, can mitigate climate-related risks.

But we need to do more. And I believe using this research to inform our strategy is the best first step we can take.

The first in a series from USGBC's Living Standard campaign, this report demonstrates the power of storytelling to further our work in sustainability.

We know that green buildings are only part of the solution to lengthening and bettering the lives of every person on the planet. That's why the heart of the green building

community's efforts must go beyond construction or efficiency. Instead, our focus must be on people.

In the pages that follow, you will see some of Living Standard's in-depth qualitative and quantitative research on people's views of the environment. This new research questions our conventional wisdom and experience.

For too long, most of us in the green building community have simply been talking to ourselves. We are not reaching the broader population effectively enough to change their behavior or decisions on the scale necessary to combat climate related risks.

But we can. If we listen and learn. And if we ask the right questions.

In the coming months, we will be speaking with you and listening to your stories. We look forward to hearing your thoughts on this report. And, by this year's Greenbuild 2019 in Atlanta, we plan to have a new direction for USGBC, shaped by the people whose perspectives we are sharing in this report, and by all of you. Our goal is for USGBC to be known not only for the plaques we place on buildings, but for the people who experience them—the ones leading longer, healthier, and happier lives.

Sincerely,

Mahesh Ramanujam

Mahesh Ramanujam
President and CEO
USGBC

PROLOGUE



The U.S. Green Building Council commissioned ClearPath Strategies, a global public opinion research company, to conduct in-depth national qualitative and quantitative research on people's views of the environment. This independent study goes well beyond the familiar audience for LEED, to include focus groups with millennials, community opinion formers, young parents, and a survey of the general public at large.

This is Living Standard's first U.S. Public Opinion Research Report of a year-long series where USGBC set out to better understand how the public feels about the issues at the core of the green building community's mission—sustainability, green buildings, and the environment. Following are the firm's methodology notes for this line of research.

The qualitative portion of the Living Standard Research Report intended to explore a broad and diverse set of key voices concerned about these issues. This portion of the research was comprised of 10 focus groups conducted between September 24th and October 3rd, 2018.

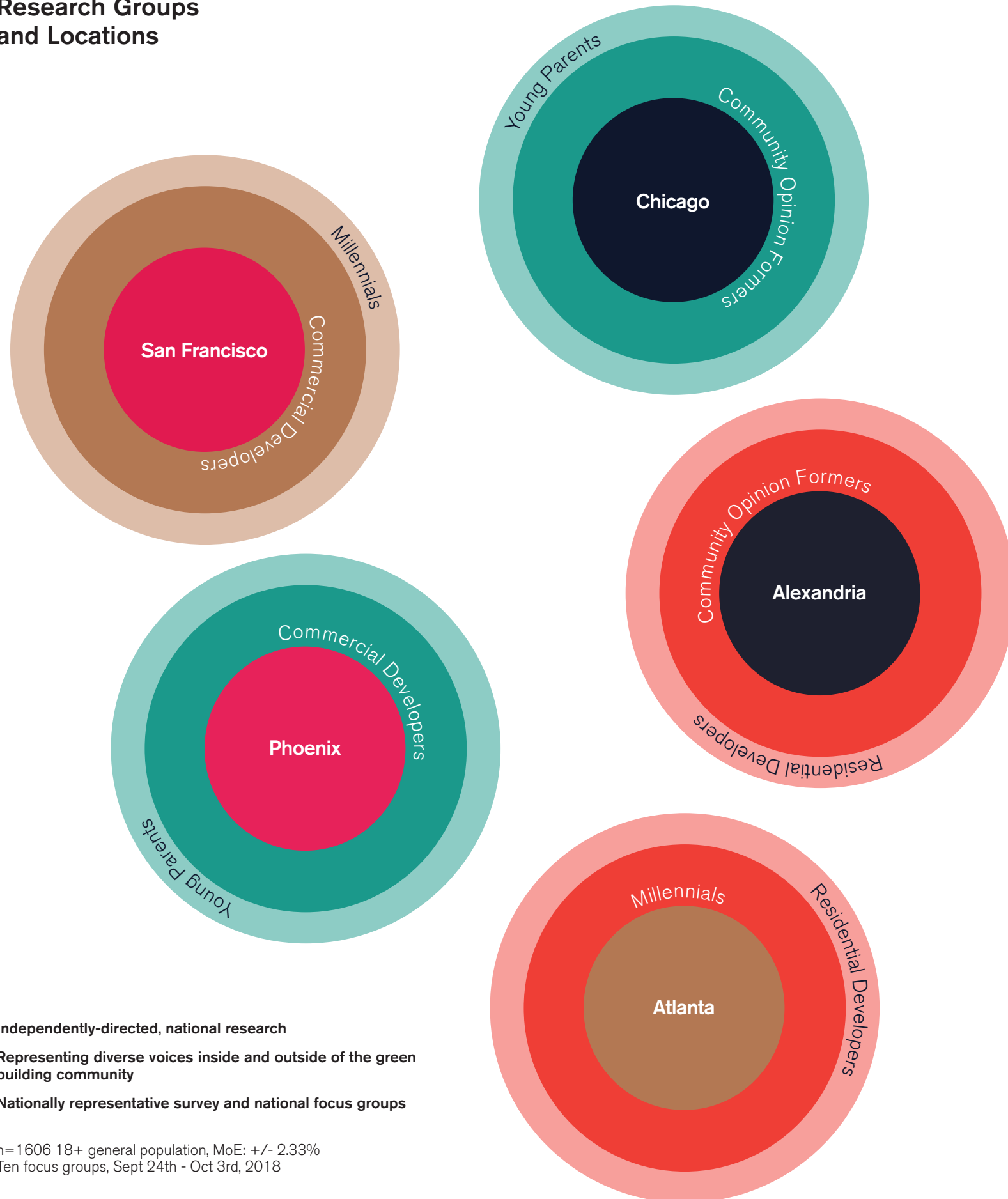
In Alexandria, Virginia, one group focused on community opinion formers (based on education level, awareness of current events, and income level) while the second was comprised of residential real estate developers and construction firms. In Atlanta, Georgia, we conducted research among young millennials aged 18-25, and residential developers. In Chicago, Illinois, we conducted research among community opinion formers and

young parents aged under 35 years old, with a child aged 10 years or younger. In Phoenix, Arizona, we conducted groups with young parents and commercial developers. And in San Francisco, California, we conducted groups with millennials and commercial developers.

The quantitative portion of the research consisted of a broad-based sample reflecting the general population of the United States. The survey was comprised of 1606 adults aged 18 years old and older from across the country. We set regional, gender, age, and race quotas to ensure a representative sample. After we fielded the survey, to further ensure our sample matched the demographics and regional distribution of the United States, we conducted post-stratification weighting by region, gender, age, race, education level, and political party affiliation. Margin of sampling error for the study is +/- 2.33%. Respondents are sourced from a leading global online panel provider. They are selected from the panel based on geographic and demographic-based quota.

It is easy for respondents to speed through surveys or not pay enough attention to provide useful data. We use a mechanism that automatically removes "speeders" from the final data set. We define "speeders" as anyone who completes the survey in a third of the time taken by the average respondent. While speed is not a 1:1 proxy for awareness, we can safely assume that if you are rushing through the survey, you are likely not taking the proper time to thoughtfully respond.

Research Groups and Locations



Independently-directed, national research

Representing diverse voices inside and outside of the green building community

Nationally representative survey and national focus groups

n=1606 18+ general population, MoE: +/- 2.33%
Ten focus groups, Sept 24th - Oct 3rd, 2018

An important finding from our Living Standard research to date—both qualitative and quantitative—is the public has different understandings of environmental problems, a healthy environment, and LEED certification. Therefore, in the context of the survey, we provide respondents with the following definitions to gauge their impressions of these ideas and level-set the knowledge base across the sample:

Environmental problems: Natural disasters, poor air quality, drought, and famine.

A healthy environment: A healthy air quality index of under 100, safe drinking water clean from chemicals, toxins, and other industrial run-off, and safe distance

from cancer-causing electromagnetic fields, like power lines or energy plants.

LEED: Leadership in Energy and Environmental Design, is the most widely used green building rating system in the world. Available for virtually all building, community and home project types, LEED provides a framework to create healthy, highly efficient, and cost-saving green buildings, communities, and cities. LEED certification is a globally recognized symbol of sustainability achievement.

Any additional methodological questions should be directed to David Bluestone, lead researcher for ClearPath Strategies on this project, at david@clearpath-strategies.com





INTRODUCTION

For the average person, the specter of environmental degradation and its impact on humanity raises a series of contradictions. People say climate change is one of their most urgent concerns about the future, but only a passing concern right now. People say it is going to impact everyone, yet hold out hope that it will not affect people like them. People say it is going to have an impact everywhere, but not in their community. People say we are all responsible to solve these problems, but take no personal responsibility for addressing them.

By and large, respondents are deeply concerned about the health of our environment over the long-term — but do very little to address the problem in their daily lives.

When asked why, they say it simply feels like too daunting a task. And, in a wake-up call for our community, they still rank green buildings quite low as a viable avenue for improving the environment.

In other words, there is a real gap between the conceptual enormity of the problem and how people seek to address it in their daily lives.

Understanding this gap and learning how to close it will be the subject of the first public opinion research report from the U.S. Green Building Council's Living Standard campaign.



01

Public overwhelmingly agrees the environment is an urgent concern for humanity.

02

People want to live in a healthy environment, but there are blockers for taking meaningful action.

03

For people to do more and create big, lasting change, conversations need to center around human terms, not just about humanity and global stakes.

04

The green building community can mobilize and inspire this change by connecting messaging to health outcomes for human beings, by continuing to prove that LEED has a role to play and can evolve to best meet public demands, and by using inclusive words and phrasing. This last note is especially important for expanding the reach of the Living Standard campaign.

OVERVIEW

A MATTER OF TIME

While 40% of respondents say the environment is one of their biggest concerns for the future, less than a quarter of survey respondents say the environment is one of their biggest concerns today.

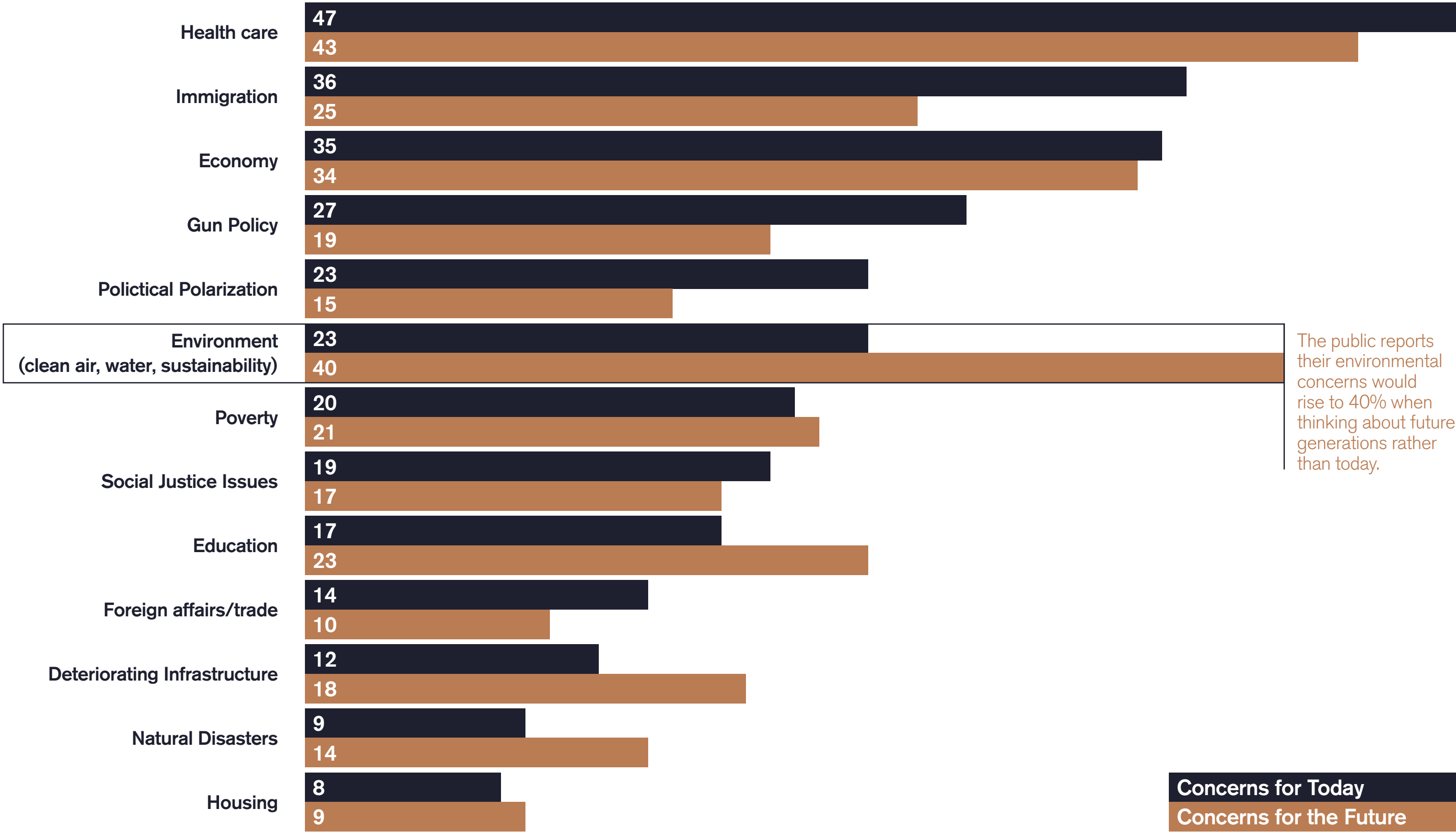
This present-future dichotomy is consistent across all regions of the U.S. There are differences between age groups, with younger respondents caring more both now and in the future than older generations — and

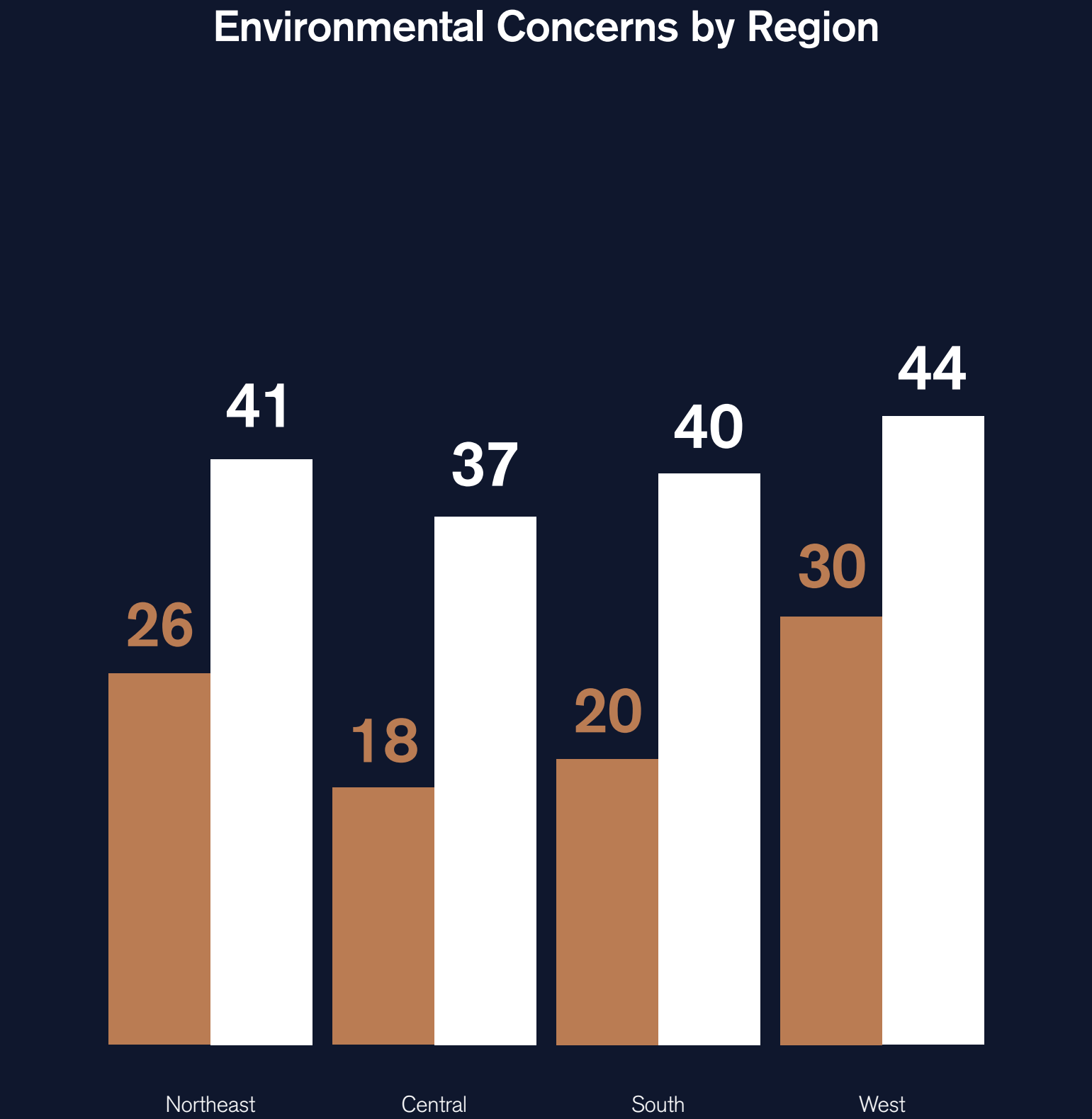
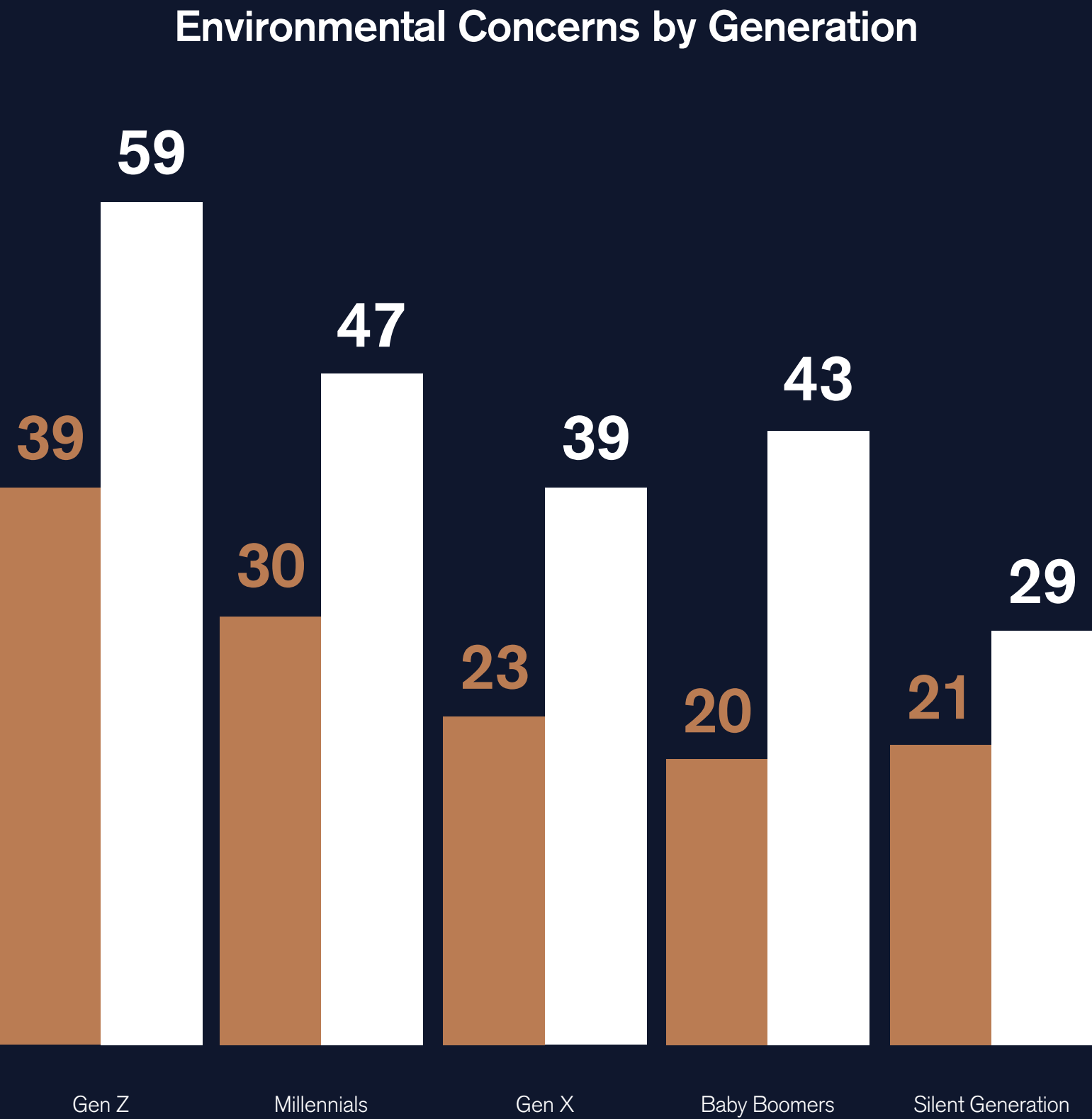
Generation Z respondents care most across time frames. Meanwhile, we see the biggest increase from today to the future among baby boomers (particularly 55-64 year olds) and parents.”

Different markets have different starting out points and relative growth across the time horizons, with the West region being the most concerned about the environment, followed by the Northeast, South, and Central regions.

& SPACE

Considering the Issues





Concerns for Today

Concerns for the Future

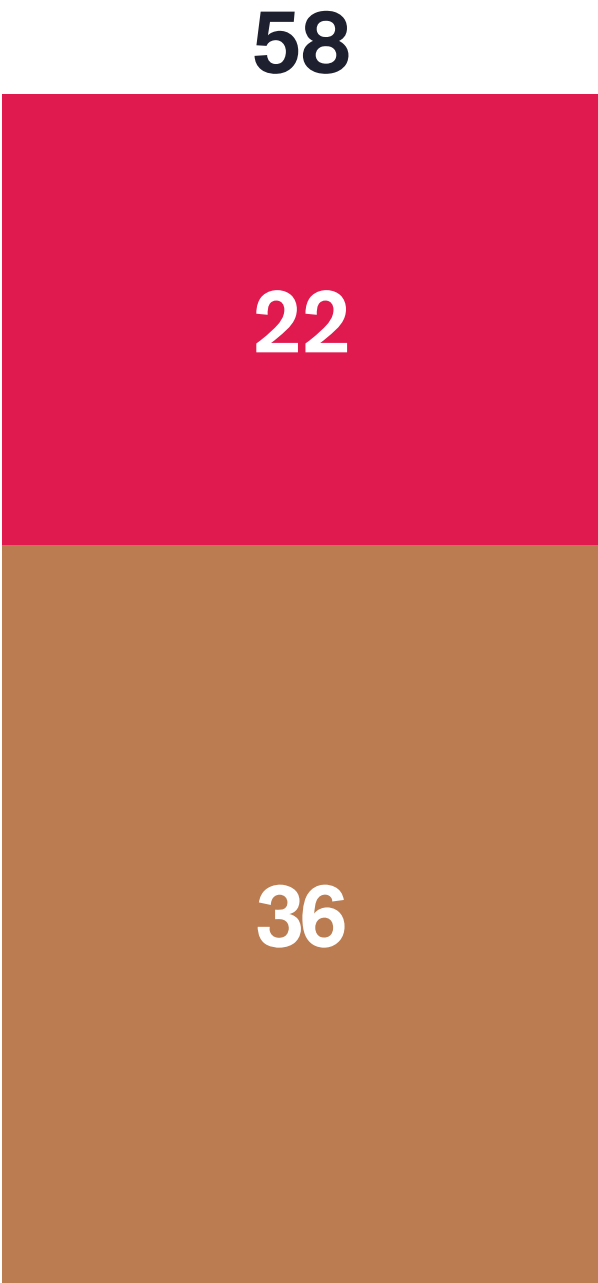


PERSONAL STAKES

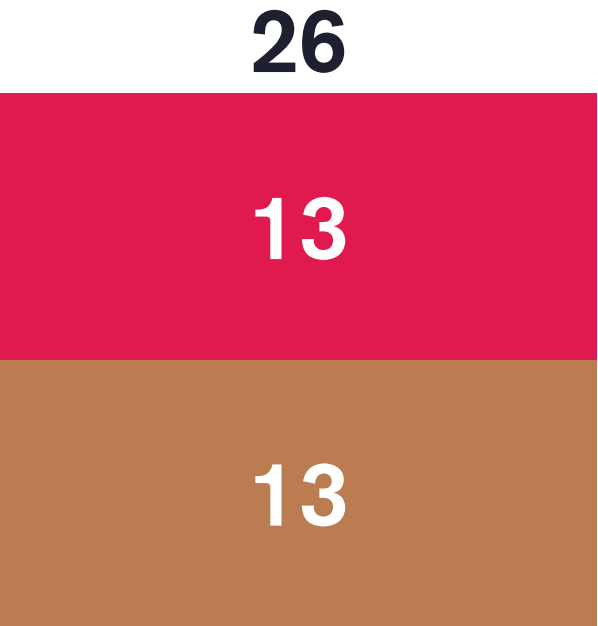
Almost three quarters of our respondents say environmental problems are very or somewhat important to them.

And people believe in the huge stakes. By more than a 2:1 margin, a majority says damage to the environment will dramatically and negatively impact people's ability to live long, healthy lives — a high bar to clear — vs. saying damage is overstated.

Which statement comes closer to your opinion, even if not exactly right?

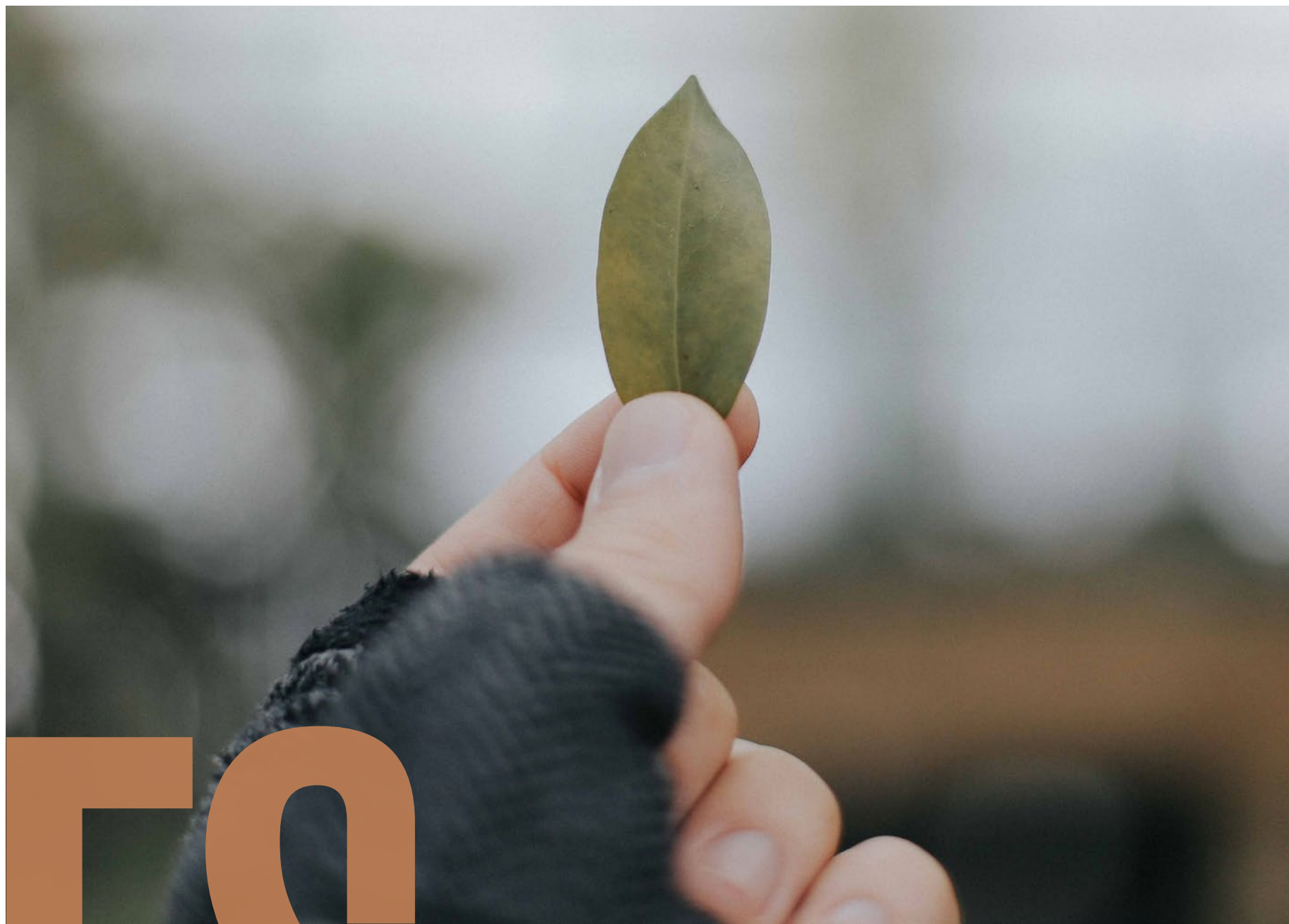


Damage to the environment will dramatically and negatively impact all people's ability to live long and healthy lives.



Damage to the environment is a problem for people around the world, but tends to be overstated.

MOST PEOPLE BELIEVE IN EXISTENTIAL STAKES



**BUT FEWER
ARE ACTING
ON THEM**

A strong majority sees the urgency of the problem—44% of people say that we should have already taken action, and only 21% say action must be taken immediately. This represents two-thirds of our sample. But another 30% see the timeline for action as in the next year, couple years, within the decade, or wait and see.

Turning concern into action presents a challenge for this community. We want to help people across the world go “all in” on making the necessary change in reversing the damage being done to our environment. To do that, we look at how urgency combines with how willing someone says they are to act or make a decision to create a better environment.

We see a strong plurality who believes it is a problem and are willing to act on it, and a slight majority (51%) who are extremely or very likely to do something to create an environment that leads to healthier lives. This also includes 8% who are activists willing to make changes, even if they don't see the environment as that big of a threat.

We also see the naysayers: just over a quarter of respondents who want to wait it out and don't see environmental problems as big as a threat.

But here we see an important target. Just under a quarter of respondents believe the problem is urgent, but are reticent to act. The problem is not part of their day-to-day struggle or considerations. This is a key demographic the green community can bring on board.

It also corresponds to what we heard in focus groups. In subsequent pages, you will see quotes that give voice to people who did not feel empowered to make change or felt their impact was minor compared to the problem and the possibility of solving it—as well as one showing fatalism and an outright unwillingness to act.



A PERSONAL



Saving the planet is too overwhelming, too abstract, and too distant from peoples' realities.

When respondents were asked to select all options for who is impacted, where is impacted, and who is responsible, most respondents choose the “catch-all” option—45% everyone impacted, 41% everywhere impacted, and 50% all of us responsible.

They did not choose their individual option—10% said “people like me” would be impacted, 5% said “my community” would be impacted, and 11% said “people

like me” are responsible. The problem is everyone's and therefore no individual person's problem.

These questions were “Select all that apply”, meaning that they could have chosen answers that identify themselves as impacted.

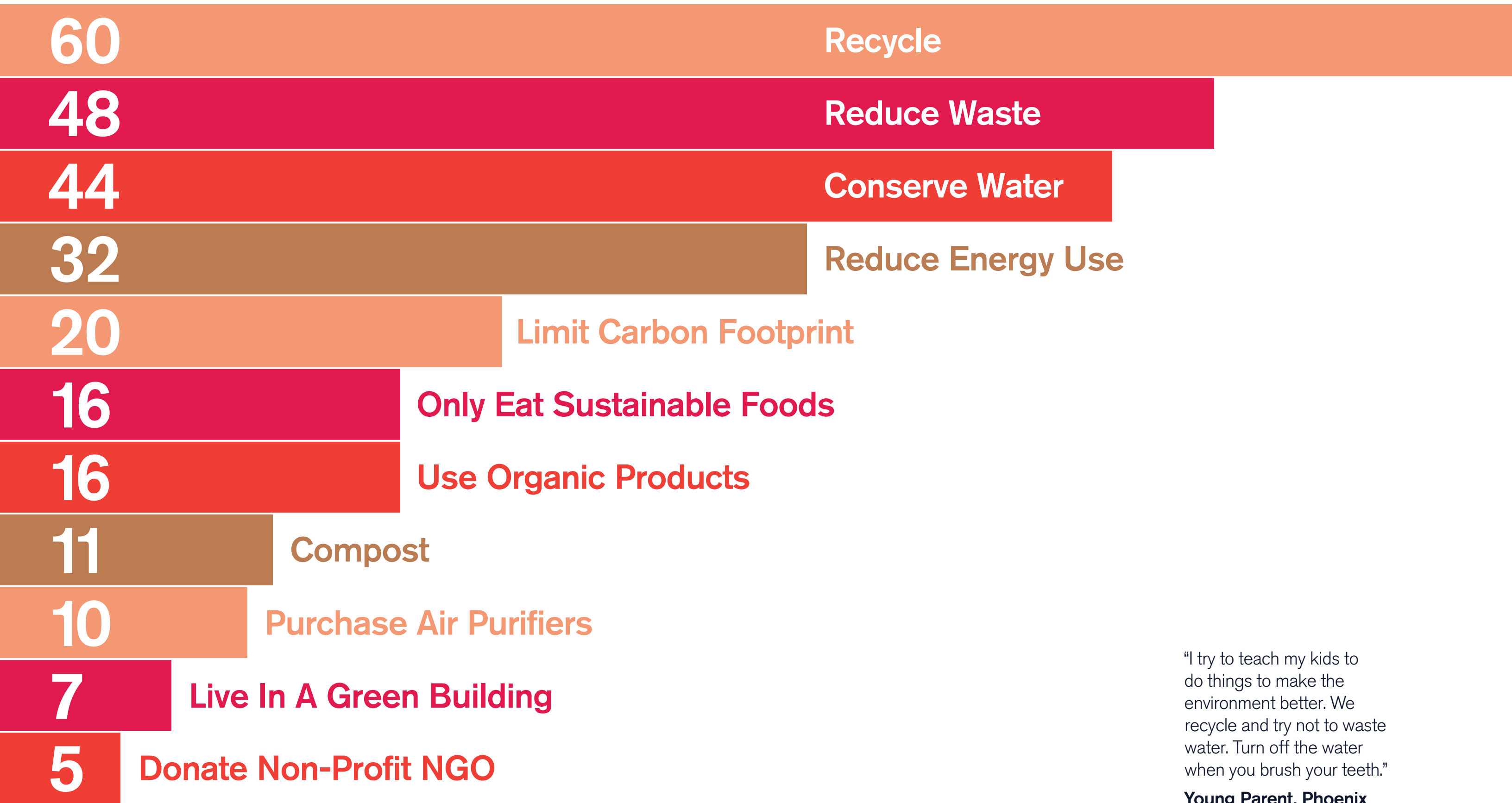
But they didn't.

In each instance, most respondents choose the “catch-all” option and they themselves rank low in the terms of both who is impacted, where is impacted, and who is responsible.

PROBLEM

People are focused on day-to-day actions in their control

What are the top three ways you try to create a local environment that lets you live a longer and healthier life?



“I try to teach my kids to do things to make the environment better. We recycle and try not to waste water. Turn off the water when you brush your teeth.”
Young Parent, Phoenix

A PROBLEM
TOO BIG
TOO ABSTRACT
TOO DISTANT
FROM THEIR



REALITIES

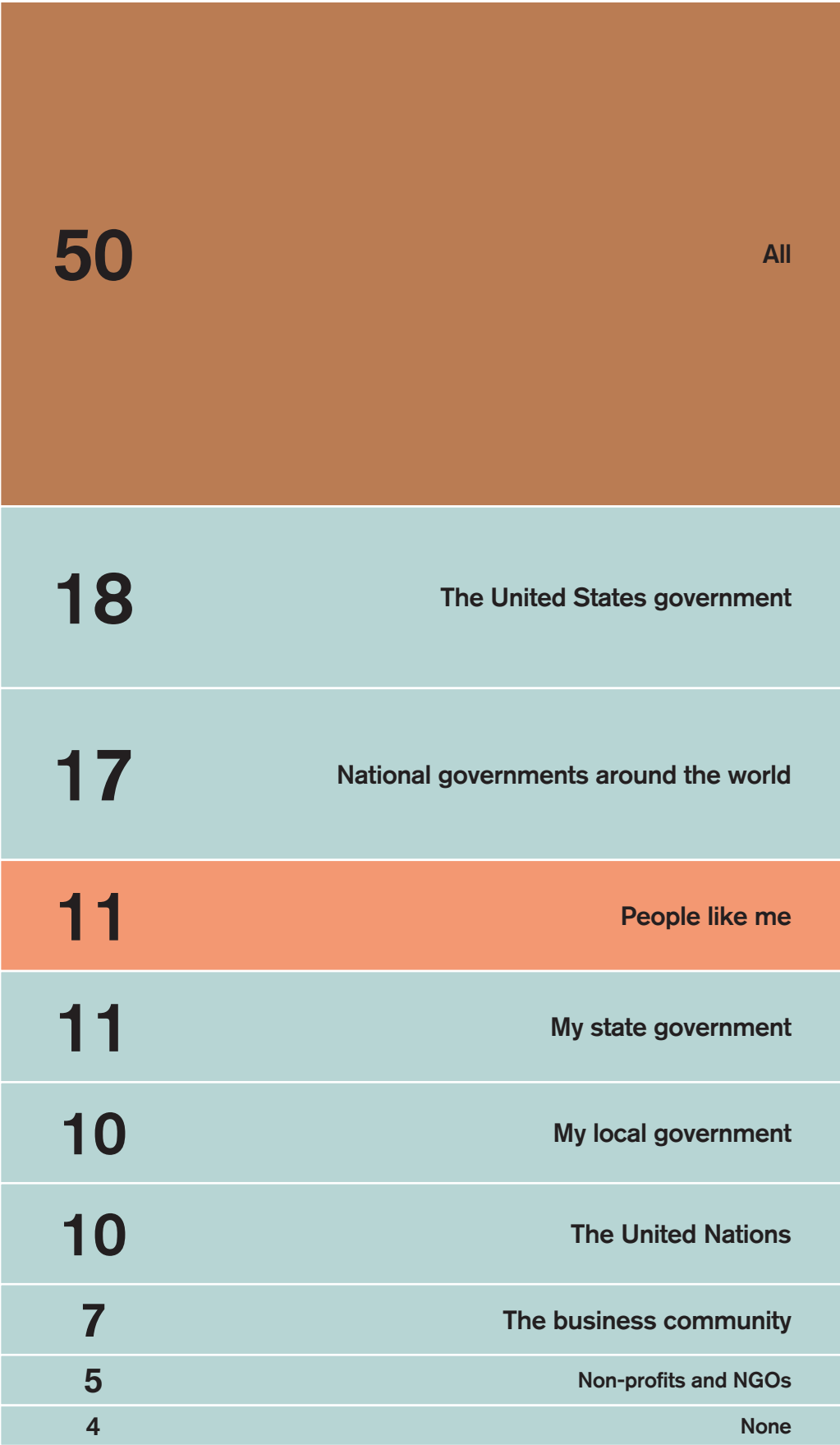
Who is impacted?



Where is impacted?



Who is responsible?



ARE WE THERE YET?

To close both the time horizon gap for how concerning the environment is or will be and the distance between individuals and the problem, research suggests it is important to bring the problem into people's day-to-day life by shining a light on the local environmental impacts if status quo of inaction continues.

Consumers make an effort to be as green as they can. A 51% majority says they would be willing to spend more money on food, products, and rent if that meant living in an environment that set them up for a longer, healthier life. (Only 31%, by contrast, wouldn't make that trade-off.) 65% of respondents don't believe their environment is very healthy — and almost a third say they have direct, personal experience with bad health associated with poor environments or living situations, like asthma (18%), dirty drinking water (12%), asbestos (9%), and sick buildings (5%).

Only 11% say green buildings.

It is worth noting that the outcomes from green buildings, resource efficiency and water conservation, rank much higher and are quadruple and almost triple the relevance than green buildings respectively. This suggests we need to speak more about outcomes and impacts, rather than physical structures.

People already give the green building community credit for their role in improving the planet.

But planet doesn't necessarily mean people. In fact, the results are very different when speaking about humans—as people are ambivalent about whether the green building community plays a large role in helping their communities.

This is the problem we need to solve.



Which statement comes closer to your point of view?

51

Strongly Agree

Somewhat Agree

30

21

I would spend more money on food, products, and rent in exchange for living in an environment that might lead to a longer, healthier life.

31

11

20

I would not increase my spending on food, products, and rent in exchange for living in a different environment, even if that might lead to a longer, healthier life.

“The whole breathing thing with the asthma is important because with my youngest son that is so severe, that’s going to stick with me. Improving the air quality could help his breathing.”

Young Parent, Chicago

65%

Give less than an “8” on a scale of 1-10 when asked to rate how healthy their local environment is.

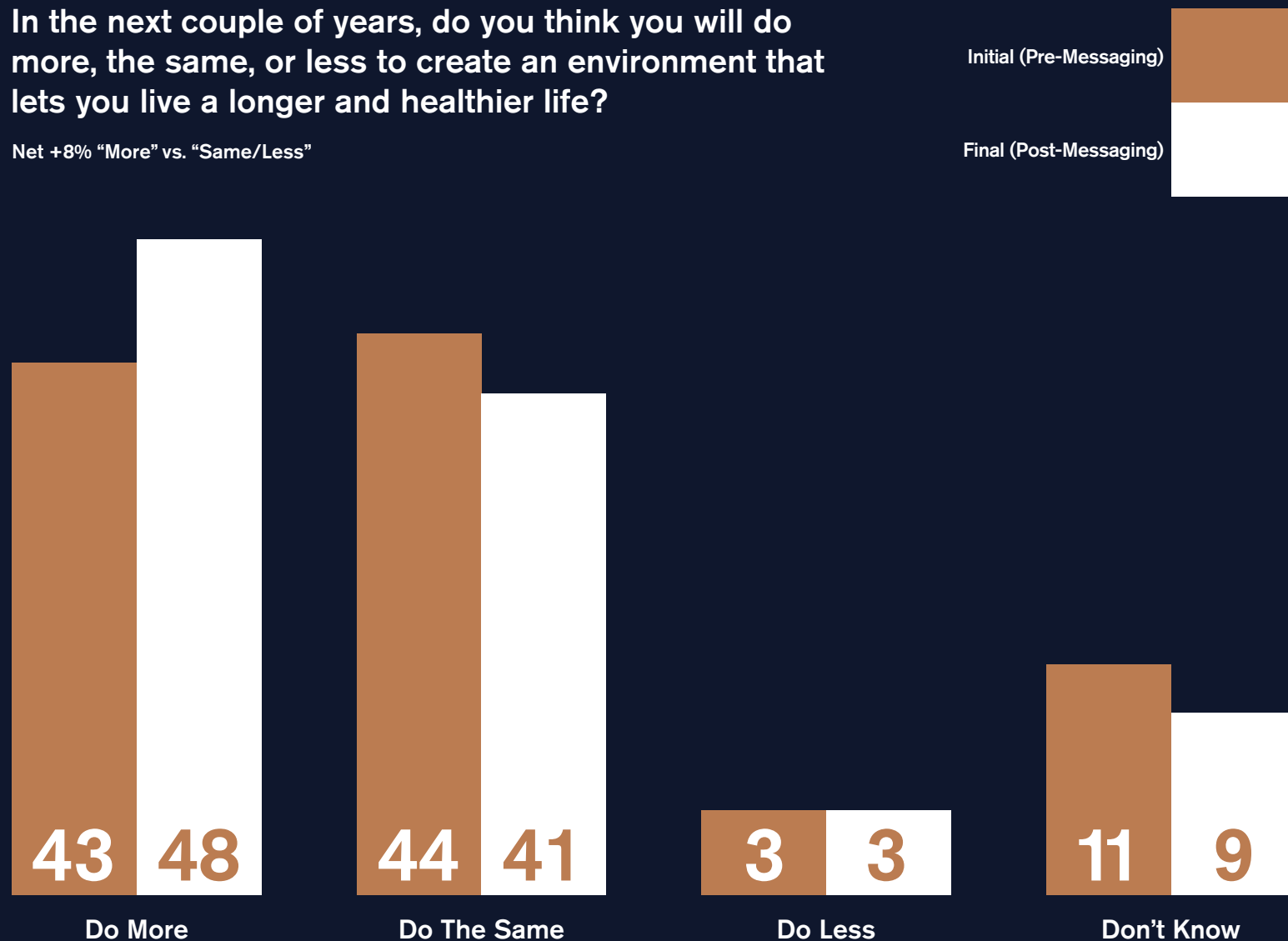
32%

Say they have direct, personal experience with bad health associated with poor environments or living situations.

THE COST OF LIVING

In the next couple of years, do you think you will do more, the same, or less to create an environment that lets you live a longer and healthier life?

Net +8% "More" vs. "Same/Less"



Getting the public to act is showing how the choices they make can directly impact their own health today.

At the beginning of the survey, we asked whether respondents would do more, the same, or less to create a healthier environment, and the public was split—43% - 44%. But, over the course of the survey, after being exposed to reasons why it is important to take action, we asked the respondents the same question and saw a net +8% shift towards “Do More.” This suggests, if we can deliver on their expectations and frame our initiatives in human terms, we inspire them to do even more.

When people who said they will do more in the future were asked why they chose that response, not surprisingly, 43% say for existential reasons, as preserving our planet will require it.

But, interestingly, 36% believe it will become easier to take environmental actions and 37% believe technology become more advanced and will allow them to do more.

This suggests that mobilizing the public to take action is not just about waiting until things get bad, but about empowering them with the tools to make those choices and actions easier, and specifically leaning into technology to do so.

(BETTER)

Why will you do more (than you do today) in the next couple of years to create an environment that lets you live a longer and happier life?



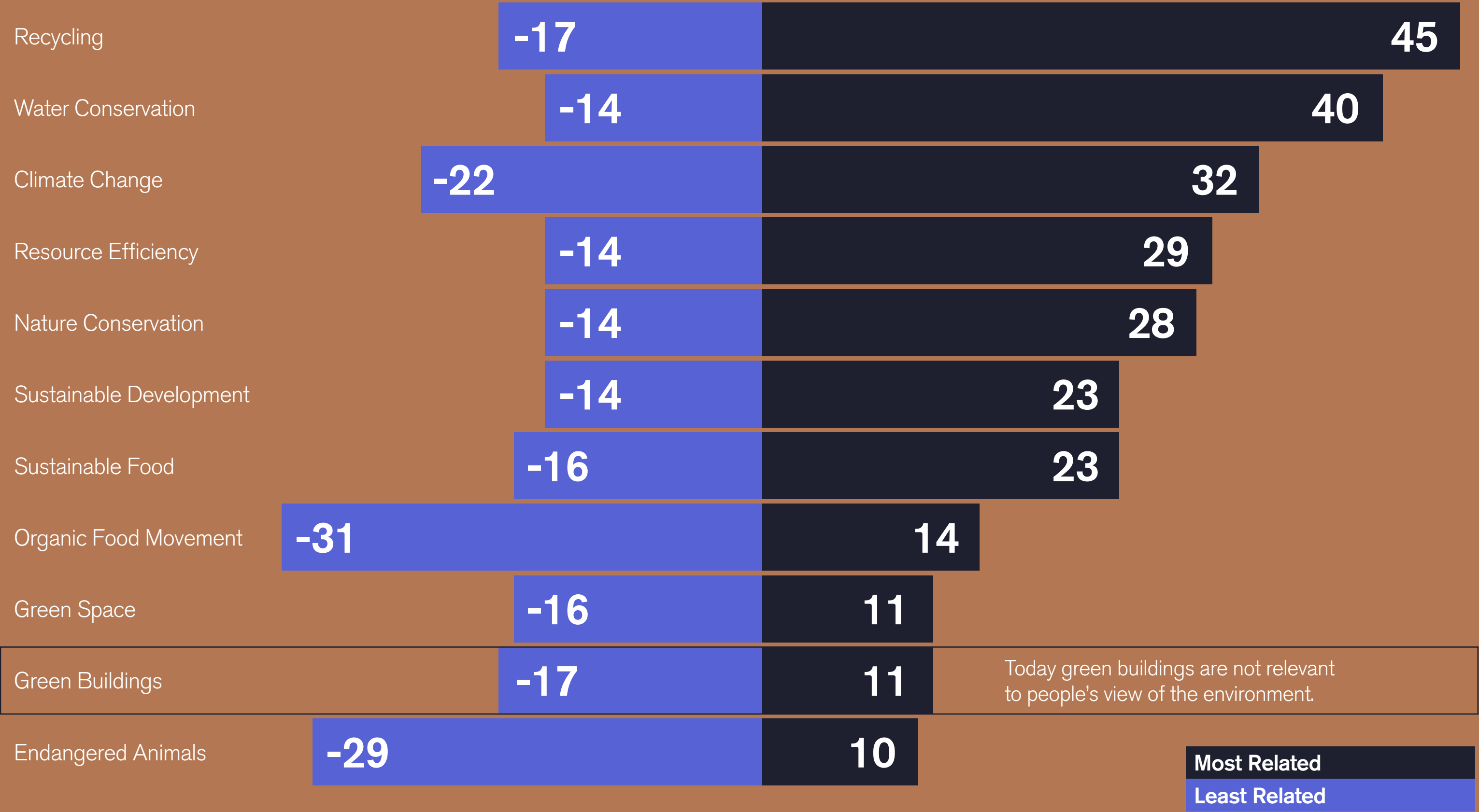
THE GREEN BUILDING COMMUNITY'S

Despite some real gains over the last several years, it's clear this community has some work to do. Green buildings are not central to the day-to-day human story. Only 11% of respondents associate words like “green building” and “green space” with creating an environment in which people live longer and healthier lives. This is far below other phrases, which people do associate with the environment — like recycling (45%), water conservation (40%), and climate change (32%).

Still, 50% of respondents say buildings and green space have a large, fundamental role in the health of the planet. Yet people are ambivalent about whether the green building community plays a large role in helping their communities with a lower percentage, 39%, who believe they have an effect on their personal health and happiness.

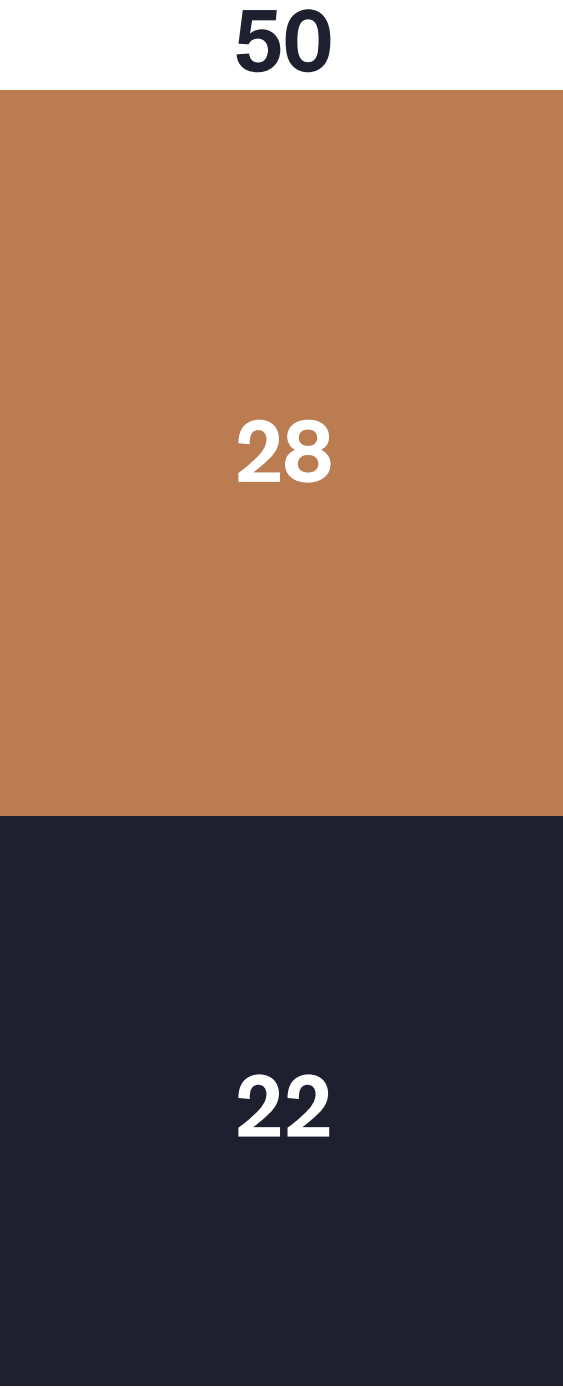
ROLE TO PLAY

Here is a list of different words and phrases associated with the environment and being green. Which THREE words or phrases are MOST STRONGLY / LEAST related to creating an environment that lets you live a longer and healthier life?

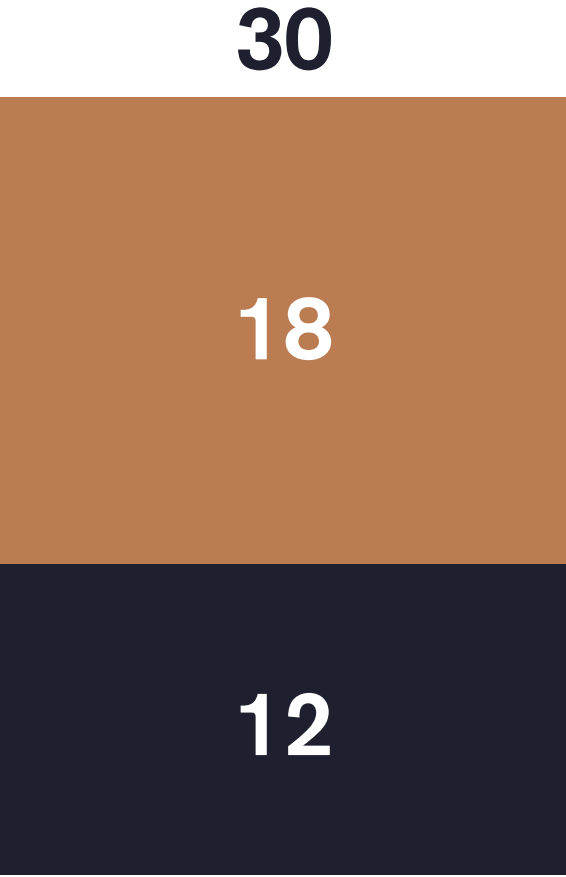


Green buildings must connect to humans, not just humanity.

Please select which statement comes closer to your view:



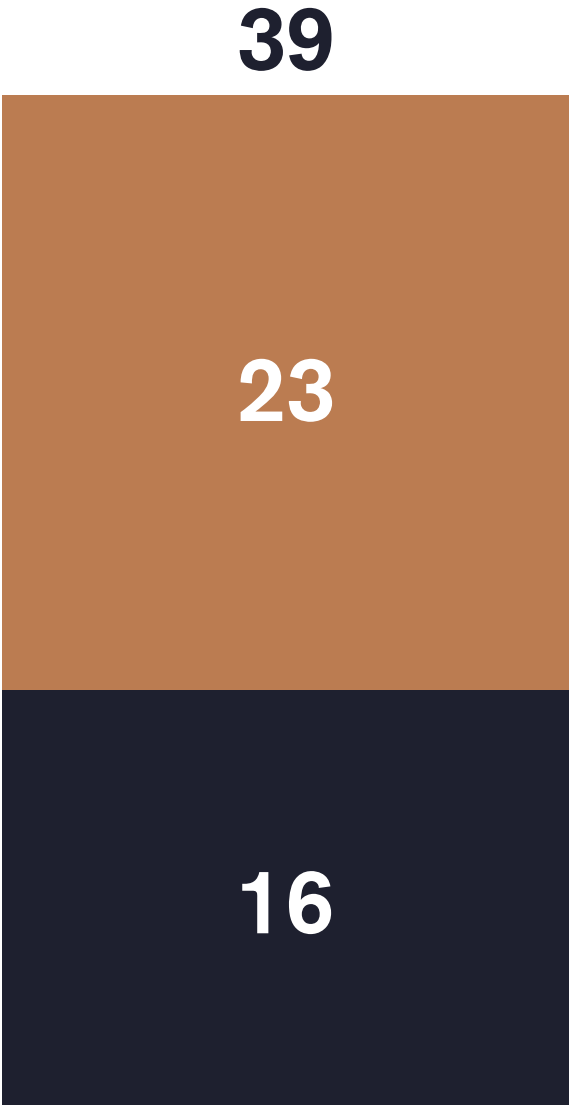
Buildings and green space play a large, fundamental role in the health of the planet's environment.



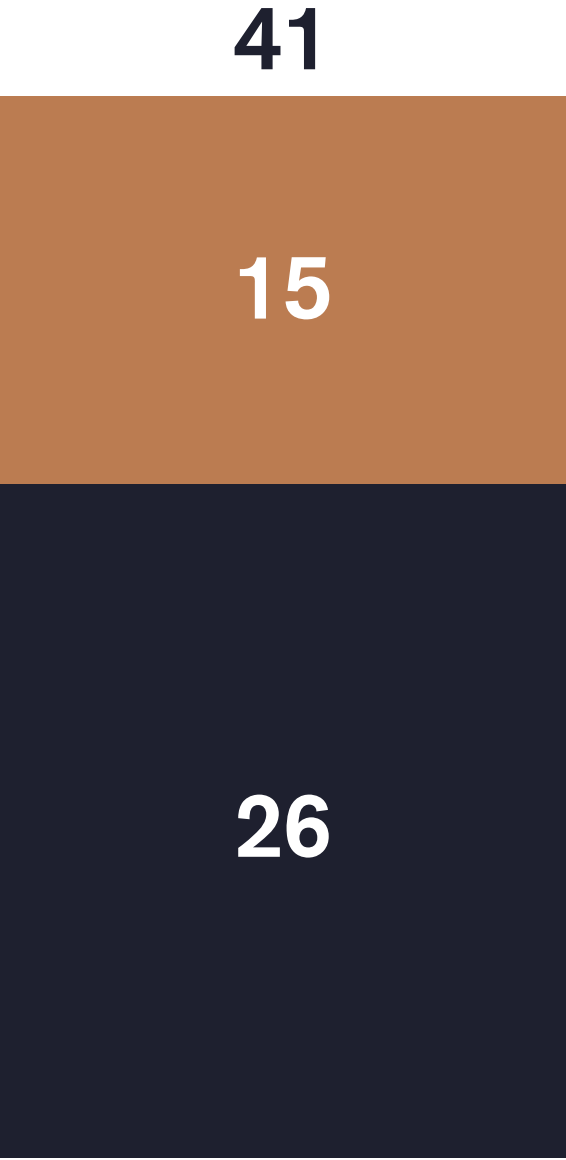
Buildings and green space play only a small role in the health of the planet's environment.

"I think a lot of the public has yet to realize the full scope of how building can impact their health and happiness. I think they're just so accustomed to seeing commercial for air filters, and air purifiers, and water purifiers they think, "I'm just being sold something"... You pull all these things together for your house, and for your office, or your workplace, and it really does matter."

Commercial Developer, Phoenix



Buildings and green space play a large, fundamental role in my overall health and happiness.



Buildings and green space play only a small role in my overall health and happiness.



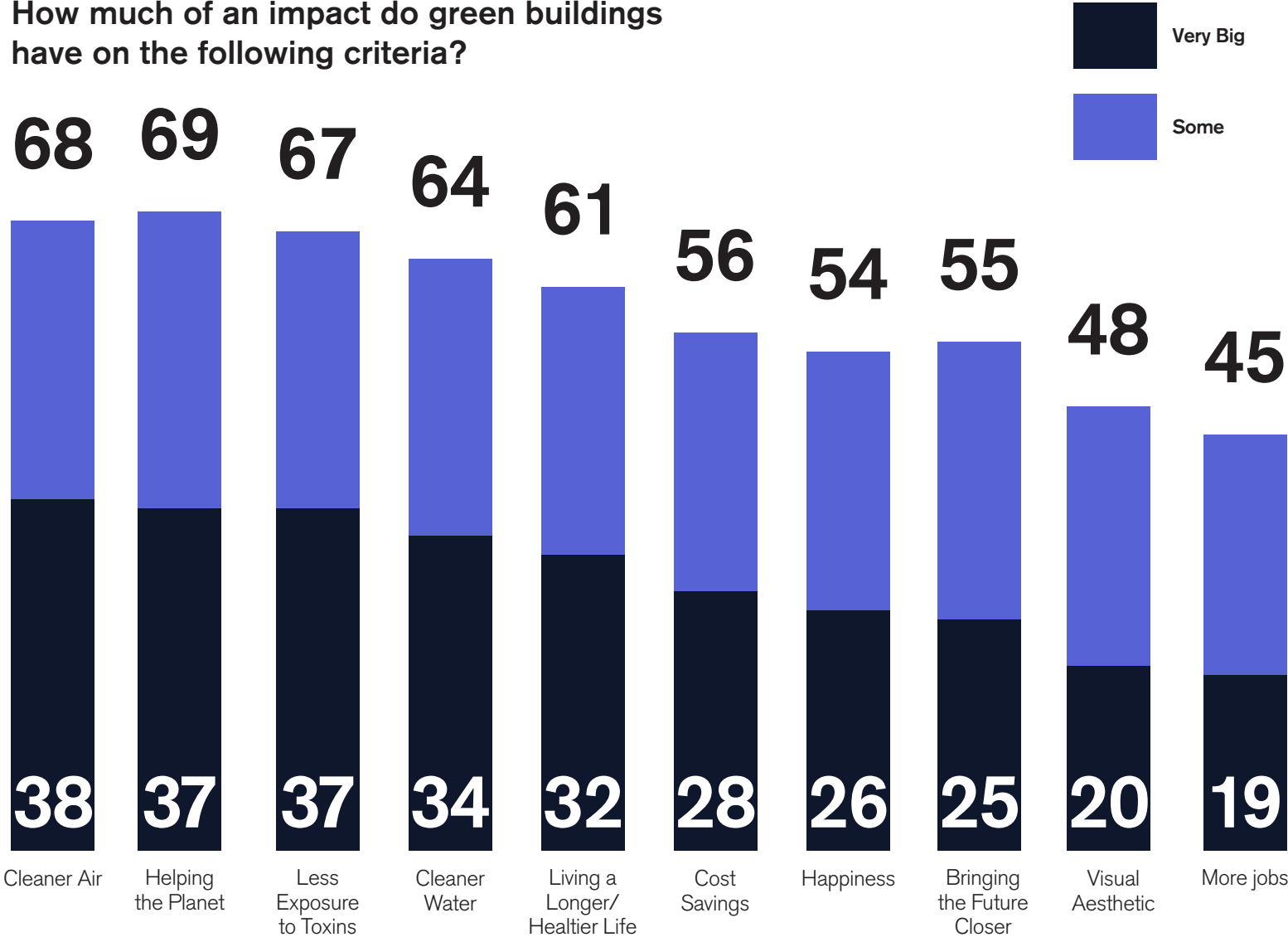
WHAT CAN

“I agree with the point that there are bigger fish to fry, like pollution and fossil fuels, but you need to get a change in the people to tackle those. You have to get a change in group mentality to make the larger changes. That means changing how people live... You see the buildings here. If you change the buildings, we make the bigger change.”

Community Opinion Former, Chicago

WE DO?

How much of an impact do green buildings have on the following criteria?

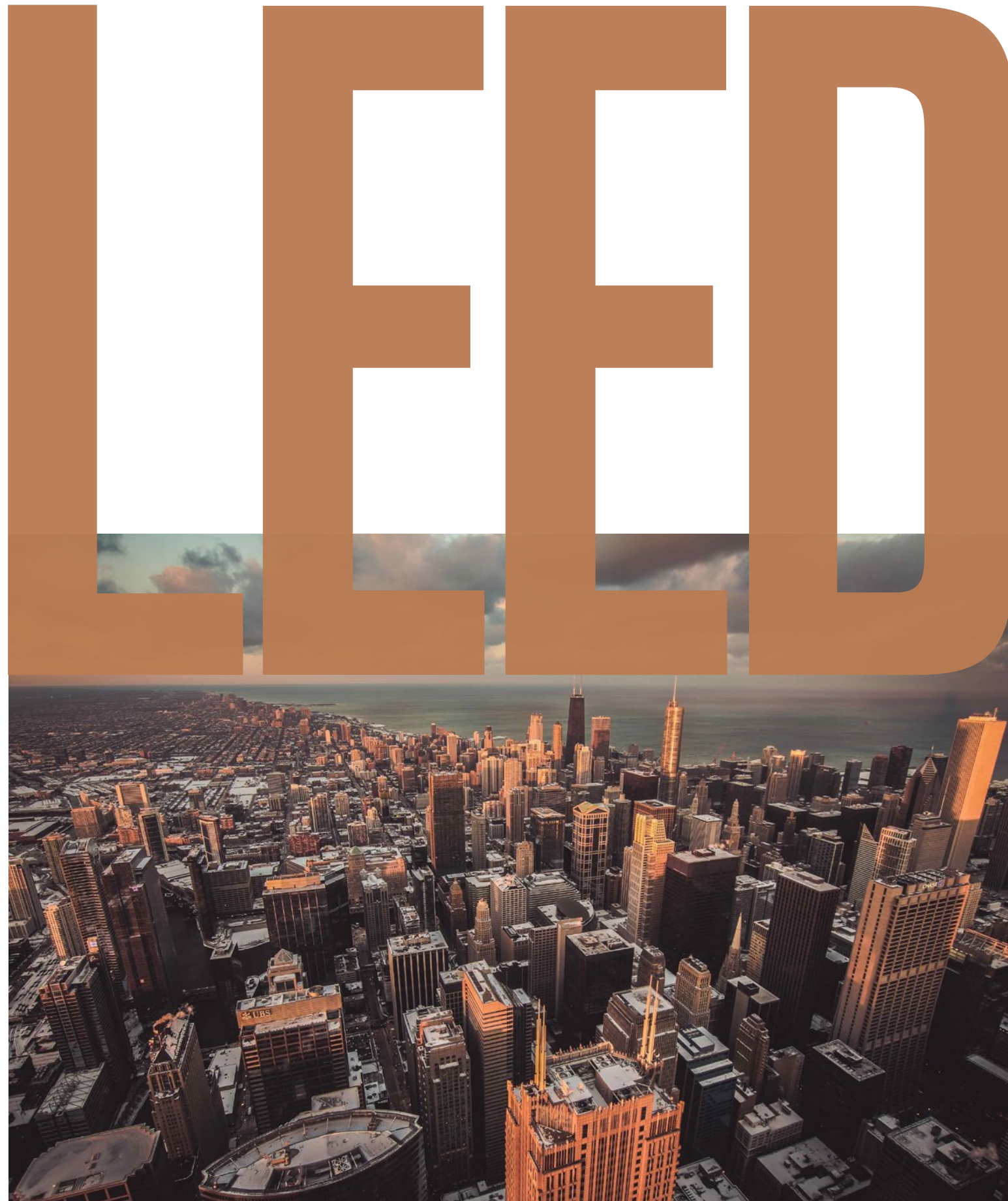


When asked, the public believes green communities are not just about helping the environment, but can have a very big impact on things they care about in their local communities.

When making our promise to people, we need to emphasize the most credible, tangible benefits, like cleaner air, less exposure to toxins, and cleaner water. For each of these, we easily surpass the number of people

who say green buildings only play a small role in their overall health and happiness. Emphasizing the top tier benefits helps us expand our support.

We need to place less emphasis on creating green jobs, or representing the future, or cost savings, or even something abstract like “happiness.” In other words, we need to think of this as **“What’s in it for us, the human beings?”**



Only just over a third of respondents say they know about LEED, but for those who have heard about it, 83% say they have favorable feelings toward LEED.

And, more significantly, after giving respondents an explanation of LEED, 59% say that LEED has a very big or some role to play in creating an environment that lets you live a longer and healthier life.

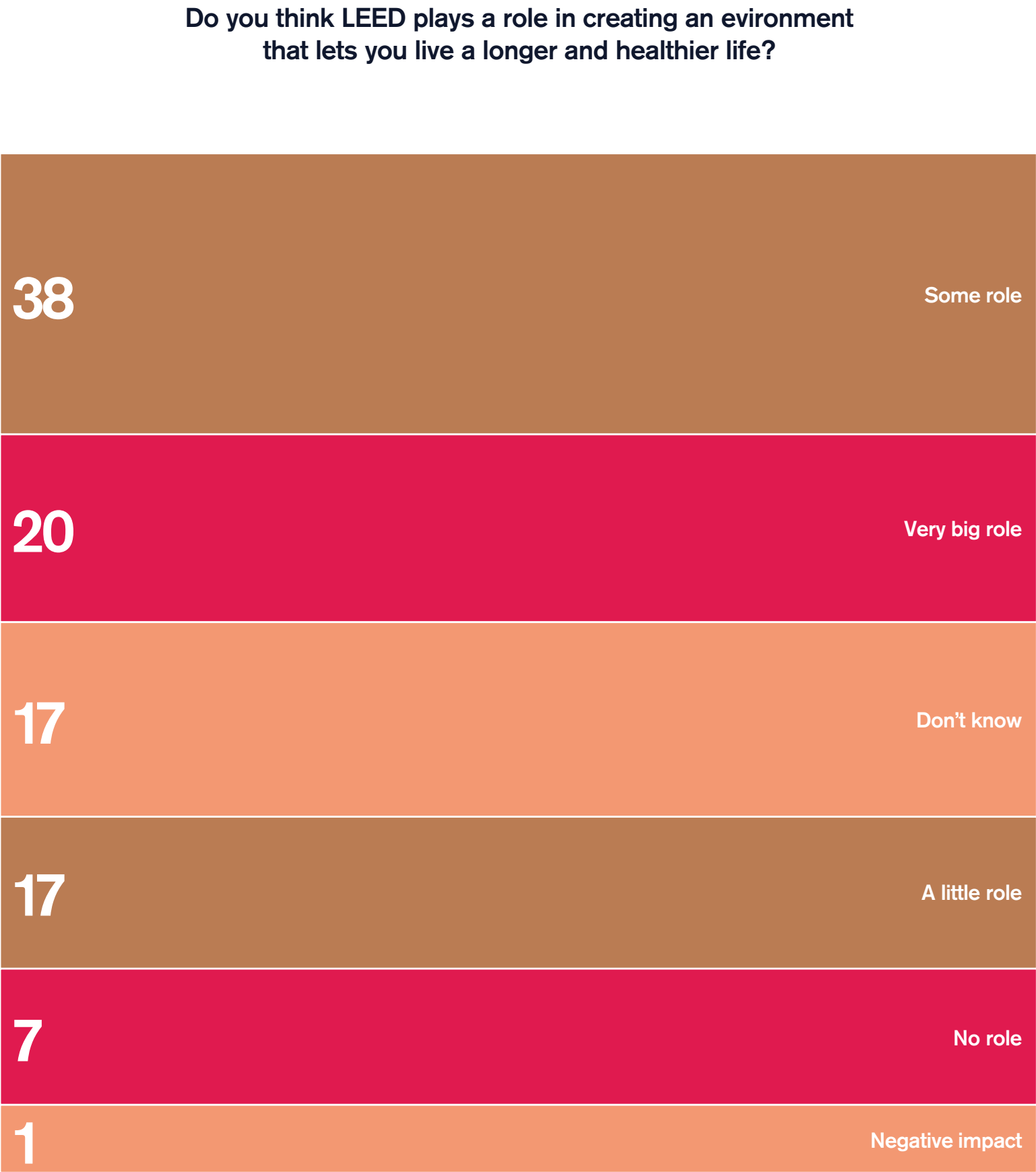
Evolving LEED can help make taking action easier for people, including leaning into tech solutions.

Making energy efficiency visible is critical. Give people a scoreboard, like Arc (GBCI's performance platform for buildings), so they can participate in the change they want to see in the world will be a game changer in educating the public on the importance of green building.



THE
WAY

LEED has a big role and can evolve to meet market demands



WORDS MATTER

Mahesh Ramanujam, President and CEO of USGBC, says, “Talking to human beings in terms of how our decision making impacts their everyday lives shouldn’t only be part of the conversation. It should be the heart of it.”

Our survey suggests three messages were most powerful amongst those target groups who shifted toward saying they would “do more” to create a healthier environment in the next couple of years.

Here is the summary of the most effective ways to talk about how green buildings can help, who they help, and why they are necessary.



Promote Healthy Outcomes

Sustainable cities improve people’s lives and better designed spaces help people live longer, healthier, and happier lives. Toxin-free materials, good air ventilation, and air-purifying plants, altogether in your house or workplace, really can improve physical health and comfort by reducing symptoms of allergies and respiratory-related illnesses like asthma.

With this message, 51% of respondents were extremely or very likely to take action.

Future Generations

At the rate the planet is warming, catastrophe is almost certain. If we continue to do nothing, our children will ask, “How could you do this to us?” And they will be right. Our future

generations deserve to live, work, learn, and play in a healthy, thriving environment.

With this message, 51% of respondents were extremely or very likely to take action.

Planetary Stakes

With more natural disasters, drought, fires, and hunger, our global environment is getting worse every day. Now UN climate scientists report that if we do not make dramatic changes in how we live and the fuel we consume, we will have an environmental catastrophe by 2030. The time to act is now.

With this message, 49% of respondents were extremely or very likely to take action.

MESSAGING CAN INSPIRE MORE ACTION

HOW? WHY? WHO?

Connect green buildings to healthy outcomes by explaining how living in green buildings and communities generates cleaner air and water, which improves physical health and reduces symptoms of allergies and exposure to toxins.

Remind people what is at stake for the planet. It's not in the abstract, it's natural disasters, drought, fires, and hunger that already or soon will impact their communities.

Connect environmental problems to individuals, local communities, and specifically to the concept that future generations deserve to live, work, learn, and play in a healthy, thriving environment.



“What’s my biggest takeaway after today?
I think it’s getting the message out to the masses beyond just the footprint of I work in the building, whatever. Relate to everybody in society. Not just the person in the building. It’s the kids, it’s the neighbors, it’s everyone, and how it’s all interconnected. I think the message has to be established, and it’s now.”

Residential Developer, Atlanta

“If you make it easy for people, and it’s just the way things are, more subconscious, they will eventually take these things out to their community.”

Millennial, Atlanta

“I think green community is more important, because you don’t necessarily have to be in a green building to be in a green community. There’s things that a whole entire community together can be doing that’s going to contribute to bettering the environment more than just one green building.”

Residential Developer, Alexandria

“Certain areas have been doing this for years...but they had more money. It’s a different thing, where they have money to spare whereas we’re just trying to keep the local grocery store open.”

Young Parent, Chicago

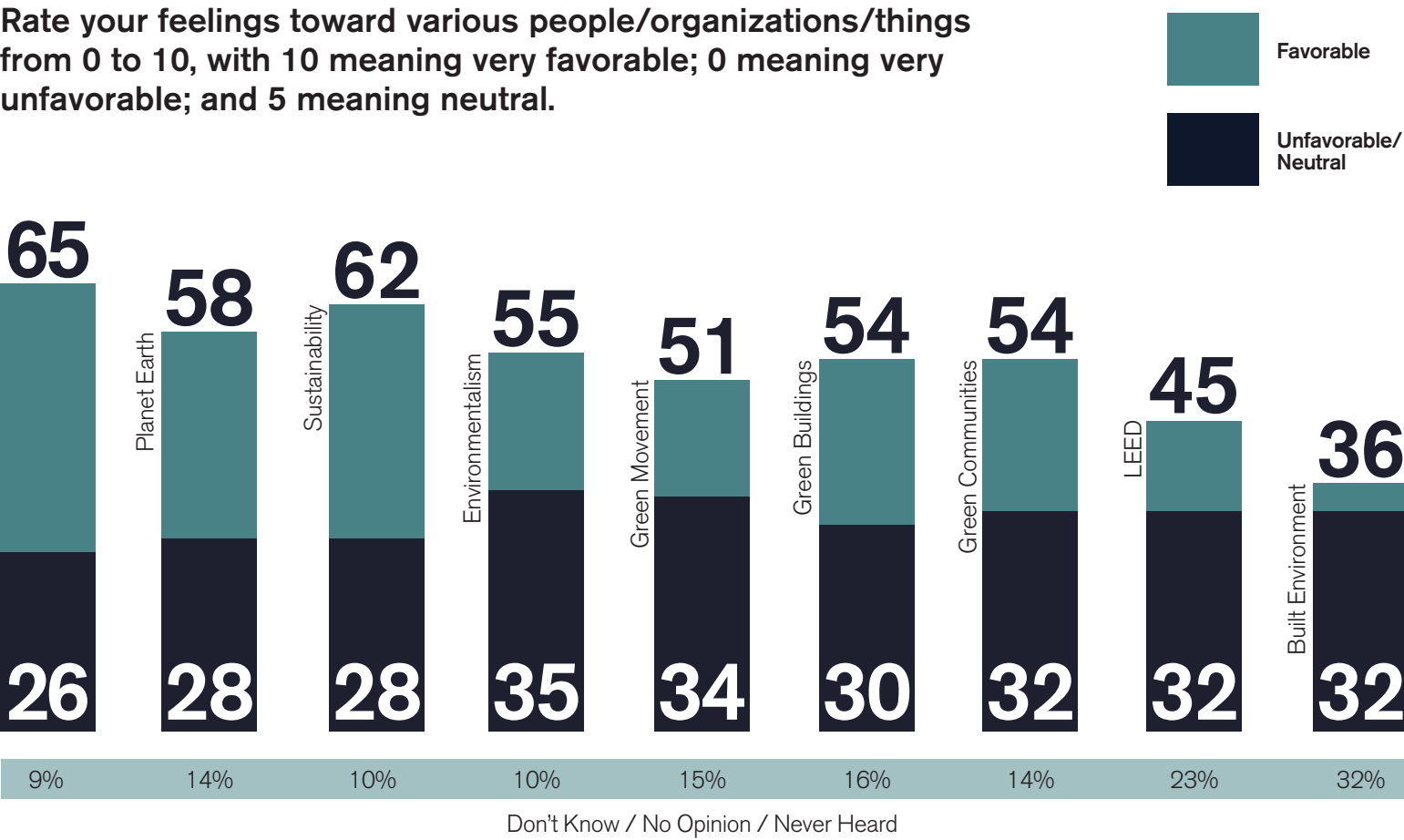
“I’m about recycling, I’m about conserving water, conserving energy. Yet, I’m not one that says, “Don’t build the pipeline because the squirrel’s going to be affected.” There’s those kind of environmentalist people, and there’s guys like me that are more practical. They do what they can, day-to-day, and try to look at the big picture.”

Commercial Developer, Phoenix

“It talks about green buildings. Where are these buildings? Where we work, only certain types of people are in these buildings. What about the people who don’t work downtown?”

Community Opinion Former, Chicago

EVERYBODY MEANS EVERYBODY



Inclusivity requires the right language.

The word “sustainability” has 62% favorability rating which is net +17% more than “green movement.”

Environmentalism is fine at 55% favorability, but there’s room for improvement.

Even anthropomorphizing the “patient” would engender more positive reaction as “Mother Nature” has a better favorability at 65% than “Planet Earth” at 58%.

In addition to talking about LEED, talking about “green buildings” or “green communities” (both 54% favorable) would be very well received as you reach beyond LEED’s steady state favorability and awareness (45% favorable, 23% Don’t know/No opinion).

And avoid industry terms like “built environment” which are not well-known (36% favorable, 32% unknown) and can confuse.

WALK THE

TALK

As the green building community embraces a deeper connection to promoting personal health and well-being and a commitment to being inclusive in how it speaks, it also must walk the talk.

When asked about recovery from natural disaster and resilient cities, a plurality believes that the green building community should take the lead on natural disasters by designing resilient cities and rebuilding green buildings during recovery. This is 15% more than people who believe the green building community should not be leading on natural disaster and just respond to market demand.

Because, after all, talk is only talk if it is not accompanied by action. Just as we seek to inspire the public to join us in an effort to create bigger and more lasting change for our environment, if the green building community is committed to doing big things and following through on big plans, than it must do so when it is most needed.



SUMMARY OF FINDINGS

Environment is an urgent concern for the public, but it has not yet led to corresponding levels of lasting, big actions.

Connecting to those still on the sidelines requires speaking about benefits of green buildings and communities in local, human terms, not just in terms of humanity and planetary stakes.

Research suggests the green building community can tap into the public's desire for better local environments with the following approach:

Speak clearly to positive health outcomes, not just physical outputs.

Evolve LEED to play a bigger role in communities where people live, not just work.

Embrace more inclusive messaging and language.



WHAT'S NEXT?

This is the first research report for the Living Standard campaign in what will be a regular series over the course of 2019, each with a particular issue and regional focus.

Our research plan will continue to take the pulse of the U.S. and socialize findings with the community with public-focused events and activation tool-kits for our grassroots.

We will prepare research presentations for stakeholder partners, community members, and the public at large, to share general trends, regional insights, and a tool-kit of messaging to take action in local communities.

During Greenbuild 2019, we will present national tracking data to show changes with last year's findings and help continue to expand the trajectory of USGBC toward the people working and living in the green buildings and communities throughout our world.

Of important note: Since launching the Living Standard campaign in mid-November 2018, USGBC's online community has already demonstrated that this type of messaging resonates. From the date of launch to a month later, USGBC Facebook content featuring Living Standard messaging saw a 79% increase in engagements and a 50% increase in reach from its regular content. And on Twitter, USGBC content that featured Living Standard messaging saw a 31% increase in engagements and a 150% increase in reach. USGBC and its allies recognize the need to be much more visible, public, and vocal about how green buildings have local, tangible, and positive impacts on consumers' lives. This is how the green building community can reach the broader population effectively enough to change their behavior and decisions on the scale necessary to begin reversing the effects of climate change.



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