



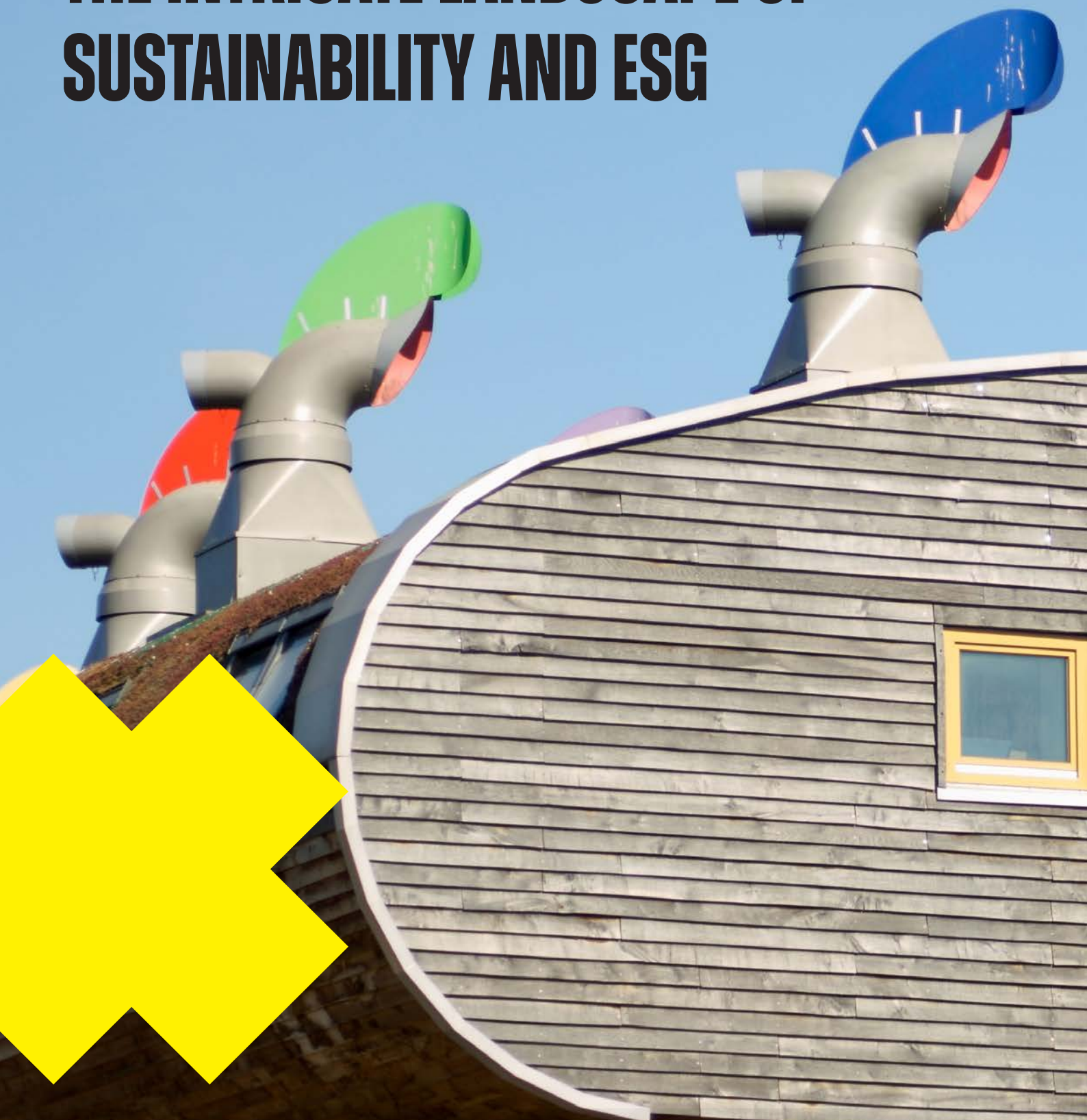
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the future of the built environment



# GREENWASHING

**WHAT'S TRUE, WHAT'S NOT,  
AND DOES IT MATTER?**

# **FUTUREBUILD IS COMMITTED TO HELPING COMPANIES NAVIGATE THE INTRICATE LANDSCAPE OF SUSTAINABILITY AND ESG**





# INTRODUCTION

The construction industry is facing increasing scrutiny over greenwashing, whereby organisations exaggerate sustainability and 'green' claims to increase marketing impact. In an effort to understand the impact of greenwashing, Futurebuild and The Anti-Greenwash Charter have conducted this industry-wide survey to help understand the impact greenwashing has on businesses.

This survey entitled 'Greenwashing – what's true, what's not, and does it matter?' considers businesses' experience with 'greenwash' across the construction industry.

The survey includes data on how greenwashing impacts the industry reputationally, commercially, and how it stands in the way of achieving valid sustainability goals.

Futurebuild is committed to helping companies navigate the intricate landscape of sustainability and ESG. It serves as a vital educational platform, ensuring that companies not only meet but exceed ethical and sustainable standards.

The Anti-Greenwash Charter is an organisation which supports the built environment in adopting and adhering to responsible marketing and communication practices.

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# FOREWORD

**IN AN ERA WHERE SUSTAINABILITY IS NOT JUST A BUZZWORD BUT A GLOBAL IMPERATIVE, THE CONSTRUCTION INDUSTRY FACES A UNIQUE SET OF CHALLENGES AND OPPORTUNITIES.**



It is with great pride and a sense of responsibility that Futurebuild has partnered with The Anti-Greenwash Charter to produce this groundbreaking report, aptly titled ‘Greenwashing – what’s true, what’s not, and does it matter?’

Our collaboration with The Anti-Greenwash Charter aligns seamlessly with Futurebuild’s mission to create a “Better Built Environment.” We are committed to fostering innovation, championing sustainability, and nurturing collaboration across the industry. This report serves as a testament to these core values, offering

invaluable insights into the pervasive issue of greenwashing that undermines genuine efforts towards sustainability.

As an organization that stands firmly on the side of the supply chain, we understand the complexities businesses face in marketing their products, solutions, or innovations. Greenwashing not only erodes consumer trust but also hampers the industry’s progress towards valid sustainability goals. This report aims to equip the supply chain with the knowledge and tools to market themselves in a more responsible and transparent manner.

We believe that for the industry to truly evolve, green claims must be substantiated by evidence. A lapse in this area can be detrimental, causing a significant decline in customer trust—a risk no brand can afford. Through this report, we hope to set a new standard in responsible marketing and communication practices, ensuring that sustainability becomes the norm, not the exception.

Together, let’s build a future that we can all be proud of.

**Martin Hurn**  
Event Director

# ABOUT FUTUREBUILD

05-07 March 2024 / ExCeL, London

[www.futurebuild.co.uk](http://www.futurebuild.co.uk)

**FUTUREBUILD IS  
ABOUT BUILDING  
A BETTER FUTURE  
FOR THE BUILT  
ENVIRONMENT.**

As the industry's premier event, we provide the stage for inspiring ideas, innovative solutions and knowledge sharing to drive sustainable construction and help us reach our goal of net zero.

The exhibition brings together the entire supply chain to showcase, debate and understand the advancements in sustainable construction and the emerging technologies that will make net zero possible. Futurebuild is about driving positive change.



# OUR APPROACH

## METHODOLOGY

**This research is the outputs of a survey from Futurebuild and The Anti-Greenwash Charter which was intended to uncover the views of people operating in the built environment around greenwashing.**

The survey, comprising 14 questions, featured follow-up points to enhance clarity and identify common trends. The survey was hosted on The Anti-Greenwash Charter website and disseminated through email campaigns targeting Futurebuild's database, LinkedIn pages associated with both Futurebuild and The Anti-Greenwash Charter, and individuals connected to these organisations. Furthermore, it reached out to various organisations, such as Timber Development UK, The Alliance for Sustainable Building Products and Ethy.

430 responses were received in the three weeks that the survey was live in August 2023. Most used their business email to complete the survey but not all so, whilst predominantly from the built environment, it cannot be ruled that people from other sectors saw the link on a public page and completed it. Of those who gave their job title, the largest group were architects (11.6%), then academics/ teachers at 7.5%, sustainability managers (8.5%), then engineers (7.3%). Other job titles given included operations manager, facilities manager, buying/procurement, interior designer, civil engineer, cost consultant and contractor. 'Other' accounted for 21% of responses and included titles such as 'Chief Executive of Environmental Charity', 'Company Owner', Chairman or CEO of trade organisations, 'consultant' and 'Commercial Director'.

Unless otherwise stated, the percentage response is of 100% of the total number of respondents.

## SAMPLE SIZE

**All figures, unless otherwise stated, are from Futurebuild and The Anti-Greenwash Charter who surveyed multiple businesses operating across the built environment.**

The total sample size was 430 individuals. The survey was carried out live online and via email responses in August 2023.

# JOB TITLES

The respondents to the survey covered a wide range of professions across the built environment including architects, engineers, contractors, facility managers and many more.



# SUMMARY OF FINDINGS

This survey highlights that greenwashing is a problem within the built environment, impacting the sector in a number of ways. It not only erodes customer confidence, but it also distracts us from our ultimate goal of achieving net zero emissions and a more sustainable future.

“ It is despicable to see. It means that I avoid that company. It confuses the audience and leads to people making erroneous decisions whilst trying to do the right thing. ”

“ Potential client once said – ‘oh just stick some steel covered with timber laminate on the front and that’ll tick the green box... ”

“ Money is doing the talking and everyone is susceptible to thinking that someone has to take the money so why shouldn’t it be them. ”

“ Greenwashing creates belief in unachievable goals in some, and uncertainty in others, preventing the right course of action being taken. ”

“ It’s criminal ”





Greenwashing can be used as a facade to get other unrelated policies or purposes agreed. A trojan horse term.



Both deliberate mis-claiming, and inadvertent, where marketing departments don't fully understand what the claim really means



It raises expectation which then can't be met - often meaning that people or organisations will spend money on the wrong things the the environment will not get the benefit it should get!



It allows organisations to claim to be environmentally aware while cynically avoiding the expense of truly beneficial measures.



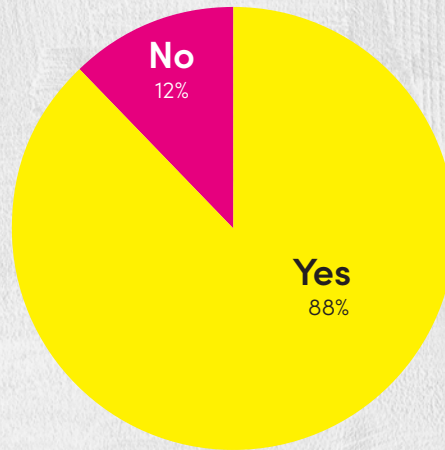
Dishonesty in marketing and dishonesty to employees who may think their work is 'sustainable'



# IS GREENWASHING A PROBLEM?

Organisations are clearly struggling to communicate their sustainability goals and achievements. In order to overcome the climate challenge, it is essential that green claims are backed up by evidence. Getting it wrong can have huge consequences to a brand's or product's reputation.

Do you think 'greenwashing' is problematic?



Almost 90% of respondents in our survey believe greenwashing to be a problem. Even those who don't believe it's problematic see it as dishonest, unethical and cost-driven. It certainly isn't restricted to the built environment, with a number of other sectors being mentioned, but the research is clear that it is impacting the organisations within the built environment throughout the supply chain.

**81%**

Dishonest

**72%**

Unethical

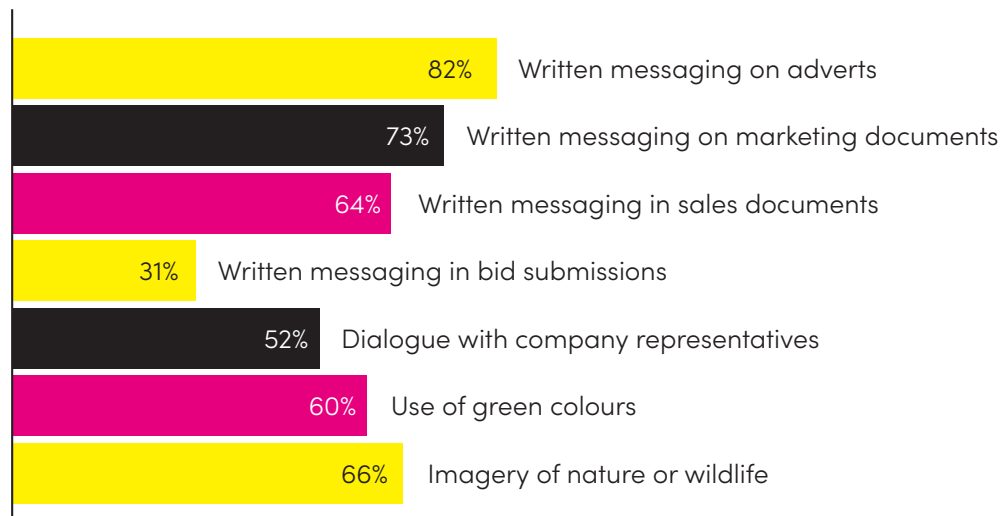
**43%**

Cost-driven

## Where have you seen 'greenwashing' occur?

Greenwashing has been observed in a number of different ways. It's frequently seen in marketing materials such as adverts, as well as bid documentation, although interestingly to a far lesser degree. It would seem that in an attempt to attract attention from prospects, the messages around sustainability are more 'generous' than companies are willing to commit to later on in developing a future relationship.

Also under suspicion are imagery and colour choices. Comments were made about the prolific use of greens in company literature but even more frequently called out was the use of imagery that is setting a tone that isn't always a truthful reflection of the situation.



Half of respondents had been in face-to-face interactions with someone telling them a more positive version of events than was verifiable. One of our future questions in the survey will be around how comfortable people feel on questioning what is being presented to them, and how best to feel equipped to robustly probe any claims.

There are also inconsistencies across different departments. 4 in 10 respondents had heard varying claims from sources across their organisations. This is either a reflection of poor communication governance across the organisation, or an indication that the claims aren't verified or properly defined.

# TERMINOLOGY

The use of 'green' terminology or vague sustainability claims is a common greenwashing practice, and is one of the ways companies attempt to gain a competitive advantage.

“ We hear about 'offsetting' a lot. Our interpretation when we hear it is 'we are not green so we will try and show we are by trying to look good planting trees. ”

“ Full transparency with organisations should be required in terms of green initiatives, like advertising you shouldn't be able to sell / promote based on false information. ”

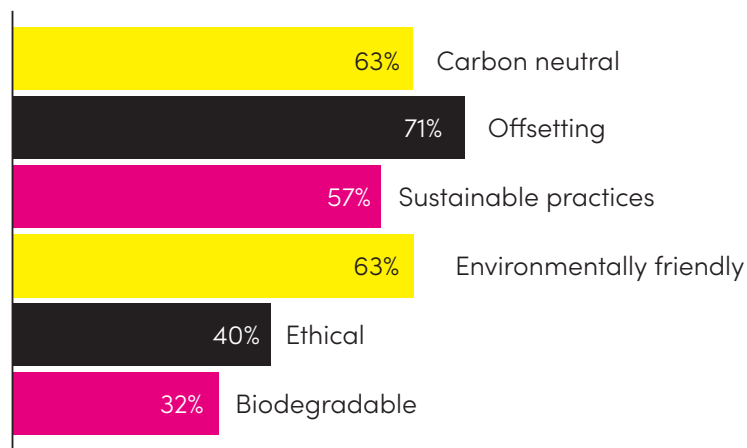
“ A lot of terms like 'sustainability' need to be tightly defined rather than being vague, if worthy, concepts. ”

“ Net Zero Carbon is the biggest claim we see for developers etc. at the moment. Often their embodied carbon rates are not published and, when they are, they are found to be higher than LETI / UKGBC/ GLA targets and the Net Zero balance is entirely achieved through offsetting. This is misleading to the tenants. Offsetting is too cheap and incentivizes poor design. ”

“ Misleading snippets from 'eco-credentials', words without a real definition or at least a claim to back it up (sustainable, bio-, eco, environmentally friendly), carbon offsetting or carbon neutral/zero etc. ”

## What are your least trusted phrases?

Phrases that raise suspicions in more than half of our respondents were 'offsetting' (71%), 'environmentally friendly' (63%), 'carbon neutral' (63%) and 'sustainable practices' (57%). To a lesser degree, but still representing at least a third of the respondents, 'ethical' and 'biodegradable' raised doubts (41% and 32% respectively).



It's essential for many people to have a clear understanding of the terms used in their specific context. With no nationally agreed standards of vocabulary, we're reliant on individual interpretation, and that can vary wildly.

Also, having a universal term is key so that customers and suppliers can make informed decisions, and so terms aren't open to interpretation and misuse.

# WHY DOES ANY OF IT MATTER?

In order to overcome the climate challenge, it is essential that green claims are backed up by evidence. Getting it wrong can have huge consequences to a brand's or product's reputation.



Reduces purchaser confidence and diverts the supplier from real action



It's a camouflage over products or services to gain market penetration

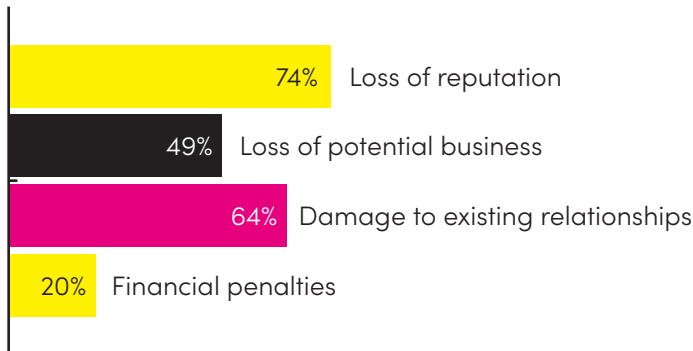


There is a very strong data from the research that greenwashing distracts from the goal at hand. If we are going to make any headway in achieving the net-zero goals, or even our own personal goals of securing a future for our future generations, it really matters that organisations are truthful about the positive and negative contributions they are making.

That way, customers can vote with their feet to support companies that are playing their part in bringing about positive change and vice versa.

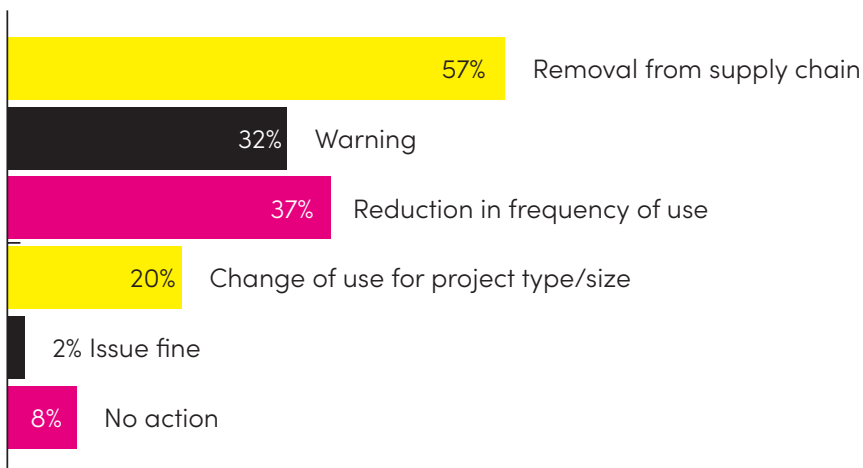
It also matters in terms of distracting from those who are trying to make change as customers learn to mistrust claims, and that belief is taken forward to others, tarring everyone with the same brush.

## If someone makes false or misleading claims about their product or service in relation to sustainability, what is the potential impact for your business?



For businesses, there are commercial implications. When considering the impact that greenwashing has, three-quarters said that there would be a loss of reputation, and 64% said it would damage existing relationships. Almost half said it would result in a loss of potential business, and 20% said being guilty of greenwashing would incur financial penalties.

## How do you respond to instances where your supplier is greenwashing?



Significantly more than half said a supplier who was accused of or found guilty of greenwashing would be removed from the supply chain, with a third saying they'd use that supplier less often. A further third would issue a warning and 20% would change the type or size of project they used that supplier for. However, and perhaps surprisingly, more people (8%) would take no action than issue a fine (2%).

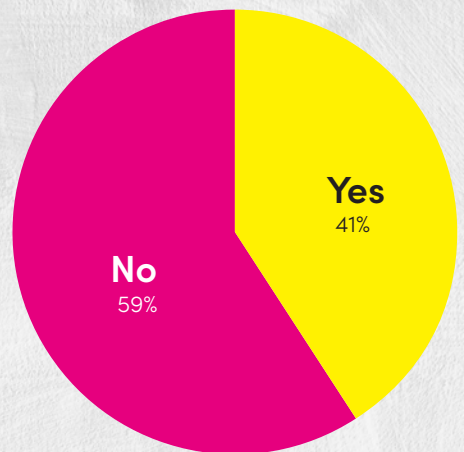
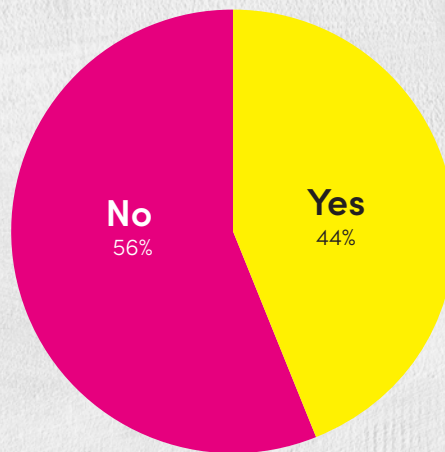
# VERIFYING CLAIMS

**So, with so much on the line, what are organisations doing to protect themselves as well as deliver a truthful picture of their impact.**

Seven out of 10 are more rigorous in asking for evidence to verify claims, with nearly half asking to see a verified Green Claims Policy. Offering that clarity on verified claims and definition of terms has benefits in that nearly half of respondents said they would be more open to new suppliers who were sharing these.

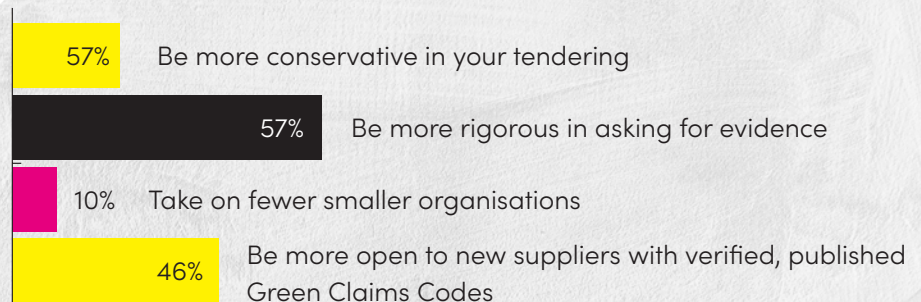
**Do you check if your suppliers have a verified, published Green Claims Policy?**

**Do you see differing claims being shared by different departments within the same organisation?**



Concerns around exposure from greenwashing hasn't really impacted the tendering process, with only a quarter saying it has made them more conservative, and 10% reporting that concerns lead them to take on fewer smaller organisations. In fact, in the research, anecdotally it is the SMEs that are faring better than the larger organisations in terms of being incorrect in their claims, whether that's willingly or unknowingly.

**Do concerns over greenwashing lead you to...**



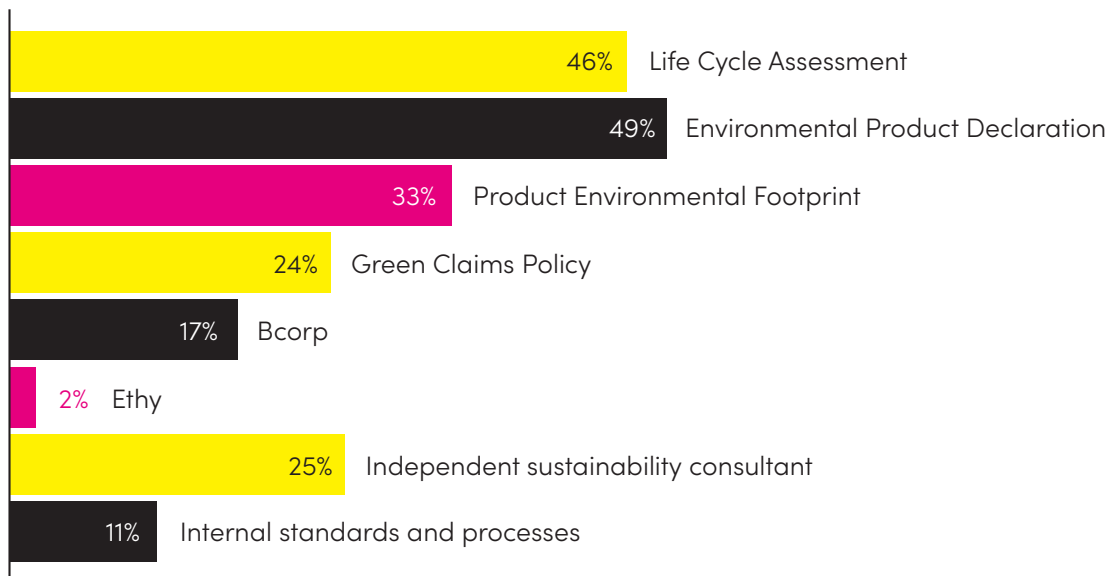


If you are looking for ways to make sure your claims are understood to be as robust as is possible, given the lack of legislation or even guidance on many of the term definitions, the research has shown that there are a number of routes that are acceptable.

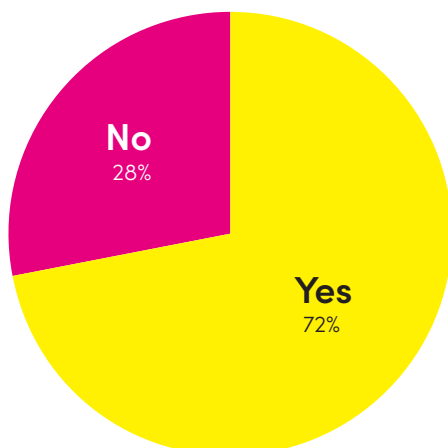
In order of frequency of use, in 50% of cases, specifiers and other customers are referring to provided Environmental Product Definitions and 46% use Lifecycle Assessments. While both are acknowledged to have some limitations, these certainly offer insights and data that can be further interrogated. Nearly 4 in 10 have developed their own internal standards and processes to hold supply chain partners too, while a similar number refer to the Product Environmental Footprint.

A quarter are using an independent sustainability consultant to provide them with the confidence that claims are backed up with evidence, and 17% accept BCorp as being a good route for validating claims.

### How do you verify claims made by your supply chain partners?



### Would you pay a higher cost for a product that has invested in providing greater evidence of sustainable claims?



When asked 'would you pay a higher cost for a product that has invested in providing greater evidence of sustainable claims?' almost three quarters of respondents said they would.

# WHAT IS GREENHUSHING?

The term 'greenhushing' refers to companies that lack transparency and create false impressions of sustainability to avoid scrutiny.



Anyone that is honest on the areas they need to improve in. No one is perfect, which is ok; just don't claim to be. And if you get called out, and it was a genuine accident, own it and move on. Green hushing is just as problematic.



I think it is important to be transparent but I don't think the fear of being called out for greenwashing should stop people sharing actual good practice and therefore enabling others to follow.



We need to recognise that immediate positive change isn't going to be possible for most, and to celebrate the changes that are possible in the short term, and the intention for the longer term. Far too many organisations are put off either making a statement about their 'small' contribution or indeed put off making any change at all because it seems that only the major changes are celebrated. Especially when these 'major changes' actually turn out to not be entirely the full picture.

# HOW CAN THE ANTI-GREENWASH CHARTER HELP?

**With concerns around accusations of greenwashing, many businesses feel underconfident about sharing the sustainability steps they are taking.**



Signing up to The Anti-Greenwash Charter sends a signal to customers, suppliers and other interested parties that you are committed to responsible marketing, are being open about the claims you're making and are willing to be held accountable.

Signatories of The Anti-Greenwash Charter not only make public their intentions around Green Claims but also are monitored to ensure there are no empty gestures and their actions support these intentions. Content produced by signatories is reviewed by The Anti-Greenwash Charter to make sure all parties can be confident in the messaging being shared.

To ensure organisations are able to control the dissemination of their messages across departments, you can also receive training for your staff around important ESG policies to ensure that messages aren't changed, amplified or misinterpreted. This step can form a crucial part of your governance.

Take action today by signing The Anti-Greenwash Charter and adopting a Green Claims Policy to demonstrate your organisation's commitment to responsible marketing. With your support, we can limit the negative impact of greenwashing and move towards a truly sustainable future.



We need honest facts to guide decisions



It creates a culture where every fact is taken with a pinch of salt and can lead to apathy



The ability to provide the sourcing data on the website, along with the company's policy for verification. You can only audit what has been agreed to be done



It's too easy to make green claims without the science to support them



Good marketing practice means being honest and clear.

When companies share detailed info about their products and how they're made, it builds trust.



Good marketing practice involves clear communication, backed by credible evidence and certifications, transparent disclosure of limitations, and continuous efforts to educate consumers about products genuine environmental benefits.



People may take advantage of greenwashing for marketing reasons.



**WE'RE TAKING A  
STAND** **FOR A**  **BETTER** **BUILT**  
**ENVIRONMENT**



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