



Research. Insight. Answers.



THE
Farnsworth
GROUP

January 2025

JCHS Healthy & Safe Home and Environmental & Energy Performance Attitudes



Key Takeaways

Executive Summary

Healthy and Safe Home



Homeowner

Concern regarding Homeowners' current home impacting occupants' health and safety has decreased since its peak in 2021, falling back to just above pre-pandemic levels. Currently, 32% of Homeowners are concerned compared to 42% in 2021. Demographically, Homeowners under 55 and those with children at home are more likely to be concerned.

- Indoor air quality remains the top concern among Homeowners who have healthy and safe home worries. Health issues within the household is the main reason for home health concerns, similar to 2021. COVID-19 exposure, a main driver in 2021, is no longer a primary worry.
- Installing rangehoods/exhaust fans, backup generators, and indoor air quality monitoring systems are the most popular healthy home projects that concerned Homeowners completed. Looking ahead, over a third of concerned Homeowners are interested in mold removal.
- Cost is the biggest barrier to these projects, with two thirds of concerned Homeowners citing it as a major obstacle.



Contractor

Contractors continue to see strength in doing health and safety home activities.

- In the past three years, over half installed or offered room additions or reconfigurations to accommodate multigenerational living. Additionally, more than a third have provided disaster preparedness measures, accessibility improvements, and indoor air quality enhancements.
- Contractors' top healthy and safe home activities of the past year were bathroom accessibility improvements and disaster repairs. Challenges such as higher material costs and customers' financial limitations affect offerings.
- Contractors are often reactive rather than proactive when it comes to discussing healthy or green home features. Homeowners are perceived as being more knowledgeable about these topics compared to five years ago.



Executive Summary

Environmental and Energy Performance



Homeowner

A third of Homeowners have concerns about their home's environmental or energy performance. Of those concerned, half have moderate to major concern for their home's green issues. Almost a quarter of Homeowners (23%) are unsure of any green issues in their home.

- They are equally concerned about their home's environmental and energy performance and its health and safety. Homeowners under 55, those with children at home, and college graduates are more likely to be concerned. A third of Homeowners under 35 are unsure about their concern level.
- For those focused on environmental and energy issues, energy costs and wasteful energy use are the primary concerns. Increased utility bills and overall home operating costs are driving this focus on energy efficiency.
- Installing electric kitchen appliances was the most common green home activity undertaken by concerned Homeowners. Upgrading to energy-efficient windows and doors was the second most common already completed activity and the top planned green home activity.



Contractor

Contractors installed almost twice as many energy efficiency retrofits or weatherization than renewable energy installments and other green remodeling in the past three years.

- Contractors' top green building projects completed the past year were energy-efficient windows and doors and general or advanced air sealing and insulation.
- The constraints for green home remodeling mirror those of healthy home projects, with high material costs and customers' lack of affordability being the primary challenges.
- Fewer than one in five Contractors integrated healthy or green building into the majority of their projects over the past year. Most Contractors feel very or extremely confident in advising clients on green building projects.

Methodology

Respondent Criteria

Homeowners

- Must own their own home
- Age and income were weighted to the US census

Contractors

- Must work as a contractor
- Residential work (vs. commercial, industrial/factory) must be 50%+ of their work
- Remodel/replace/repair work (vs. new construction) must be 50%+ of their work*

*In 2021, Contractors were required to have home improvement or residential remodeling projects be a significant portion of their business the previous year. Also required was to have installed or offered either lead or other hazard removal, indoor air quality, accessibility/universal design improvements, or disaster/storm repairs or preparedness in the last three years.



Project Methodology

JCHS partnered with The Farnsworth Group to interview Homeowners and Contractors about their experiences building a healthy and/or green home. This research looks at activities and projects conducted by both groups to better understand what is being done to promote occupant health & safety and environmental & energy performance. To do this, interviews were conducted in October of 2024 among Homeowners and July of 2024 among Contractors.

The sample includes 2,017 responses from Homeowners and 373 from Contractors. The average survey length was roughly 5:30 minutes.

Data is trended back to a similar study conducted in 2021 when possible. Due to different methodologies in the qualification on Contractors, not all results are comparable.



1

Objectives

Healthy and Safe Home

Homeowners:

- Concerns
- Reasons
- Activities
- Obstacles

Contractors:

- Customers' interest level
- Trends
- Benefits
- Constraints

2

Environmental and Energy Performance

Homeowners:

- Concerns
- Reasons
- Activities
- Obstacles

Contractors:

- Customers' interest level
- Trends
- Constraints



Healthy and Safe Home



1

Healthy and Safe Home

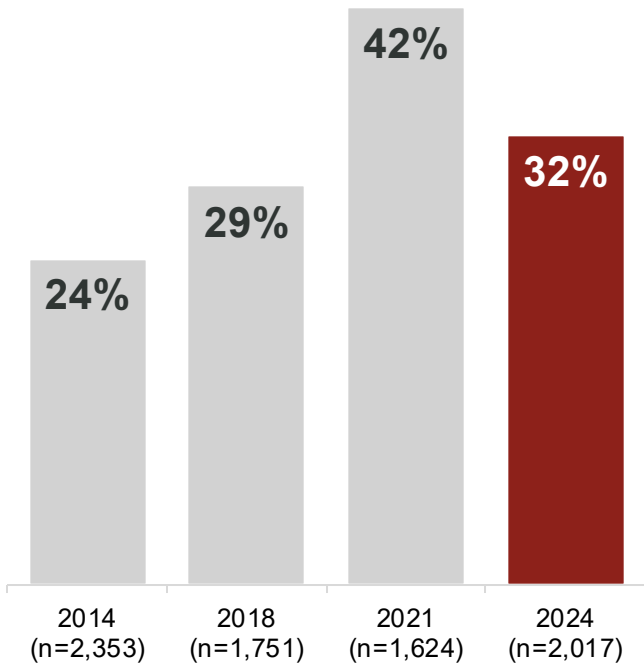
Homeowners





Homeowner concerns about home health and safety have returned to pre-pandemic growth. Those under 55, with children and higher education remain more concerned.

Percentage Of Homeowners Who Have Health And Safety Home Concerns



Homeowners Who **Are Concerned** Vs. **Not Concerned** About Home Affecting Health And Safety

(n=2,017)

17% were “Unsure” about their concern level

		Concerned Total 32%	Unconcerned Total 51%
Gender	Male	33%	51%
	Female	31%	50%
Age	Under 35 years	40%	38%
	35 to 54 years	40%	45%
	55 years and older	20%	65%
Children	In home	44%	42%
	Not in home	26%	55%
Household Income	Less than \$50K	35%	49%
	\$50K to \$99K	29%	52%
	\$100K+	33%	51%
Education	High school or less	33%	53%
	Some college/associates	27%	51%
	College degree	34%	47%
	Graduate degree	38%	52%

*“Wellbeing” removed in 2024
“Suspect” and “Minor concerns” were combined in 2024
“Major concerns” and “Problems” were combined in 2024
QH3. In the past year, how concerned have you been about your current home negatively affecting your or another occupant’s health and safety*?

Click [here](#) to see the data in graph form

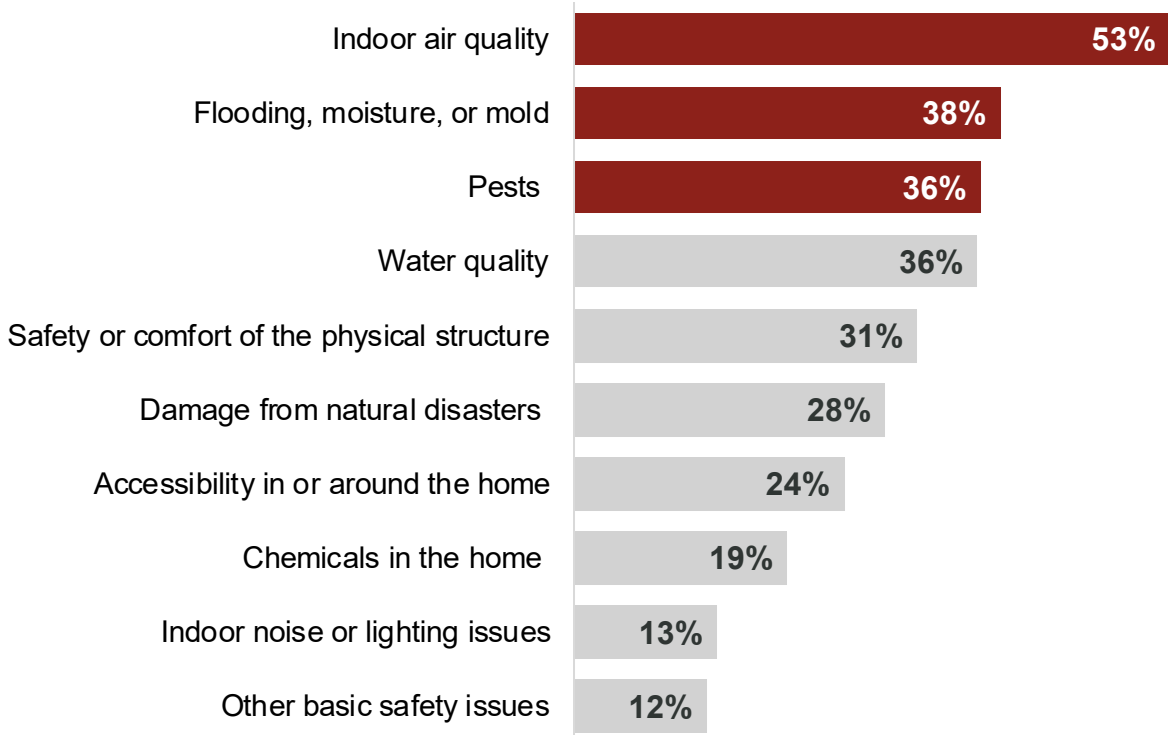


Indoor air quality remains the top concern for homeowners, primarily due to household health. Unlike in 2021, COVID-19 exposure is no longer a leading factor.

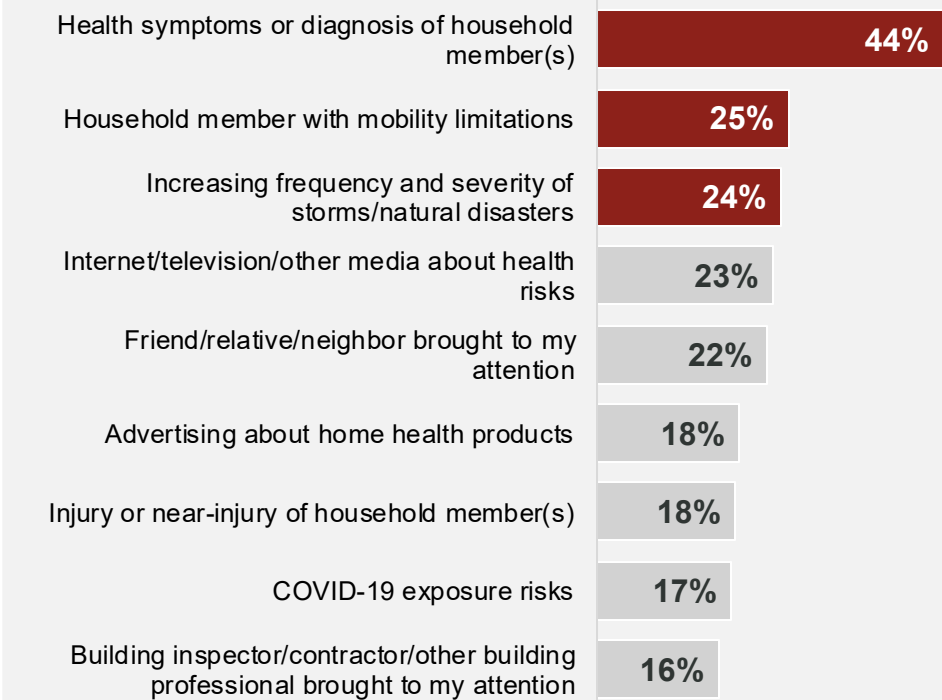
Homeowner Categories And Reasons For Home Health Or Safety Concern

Among Homeowners who have home health or safety concerns (n=651)

Categories of Concern



Reasons for Concern

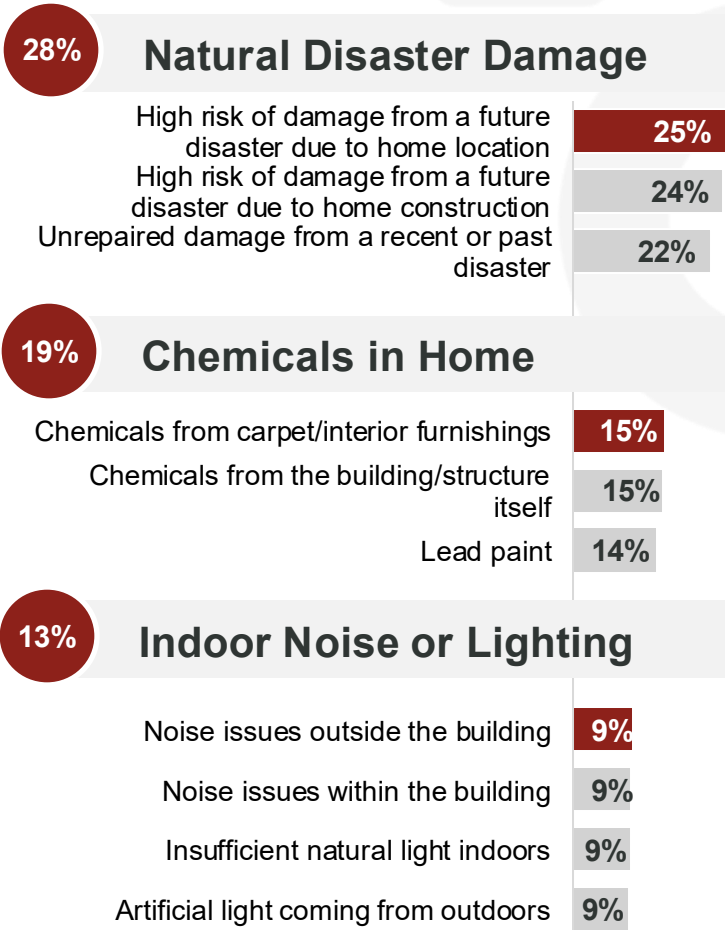
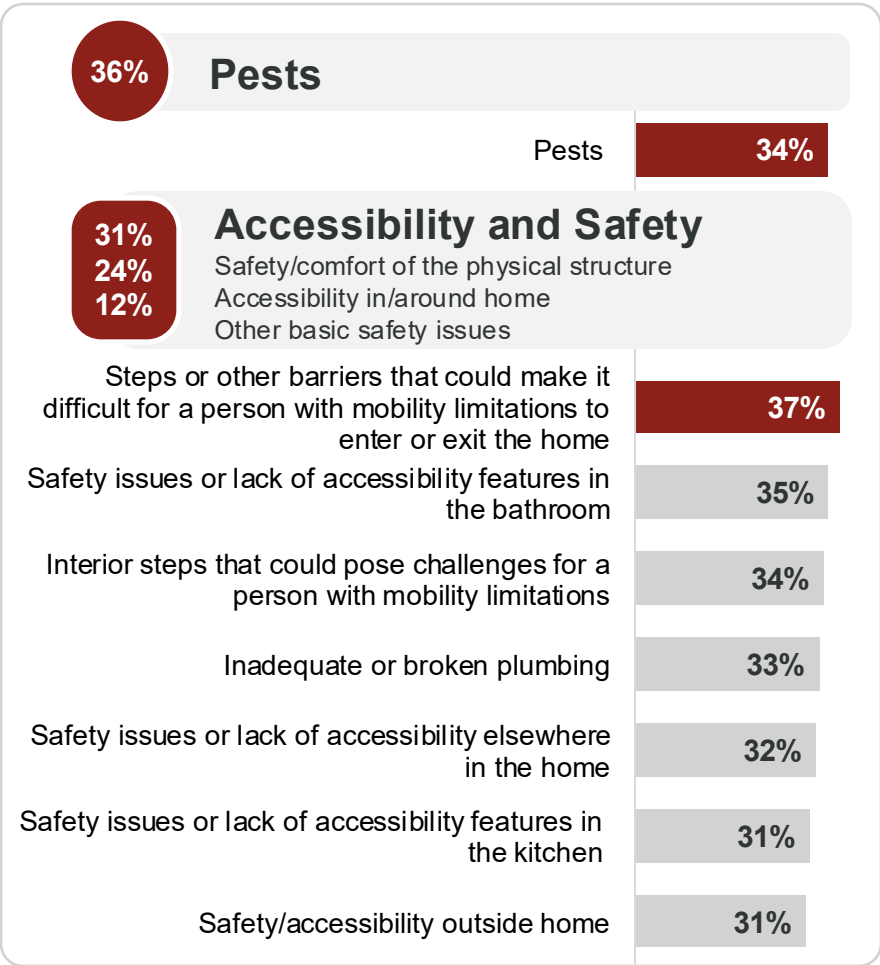
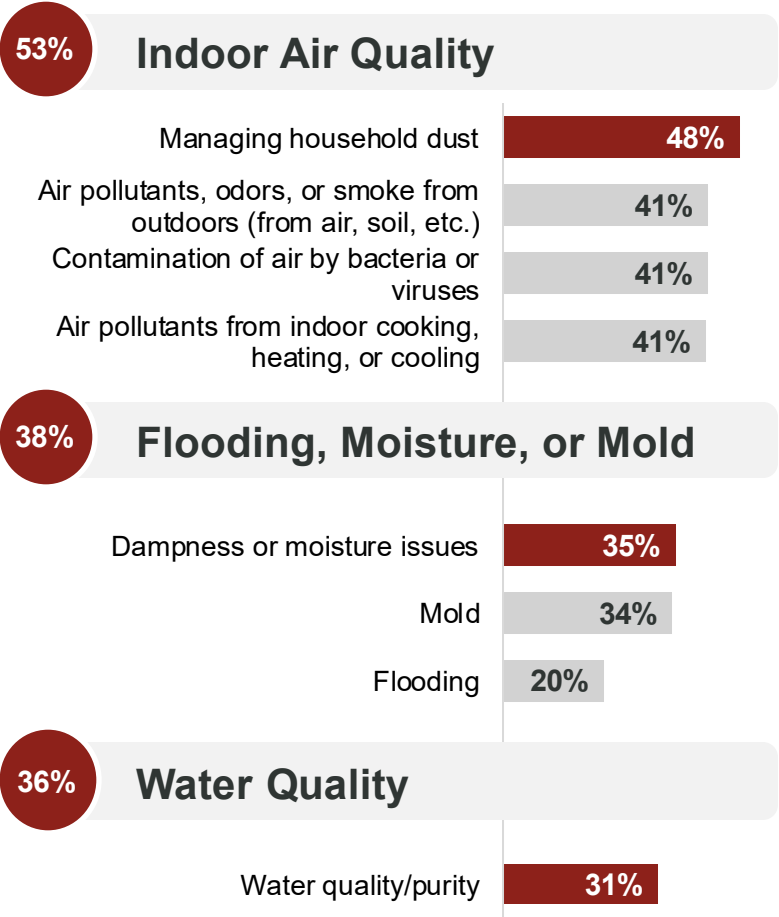




Managing household dust & pollutants remain top concern, as in 2021, while concern for other issues has declined.

% Very Or Somewhat Concerned About Home Health And Safety Issues – Top Issues By Category

Among Homeowners Who Have Home Health Or Safety Concerns (n=651)



QH5. [SHOW SELECTIONS MADE AT QH4] Of the following issues, how would you rate your level of concern over the past year regarding your current home?

Very Concerned

Somewhat Concerned

Not Concerned

Unsure/ Don't Know

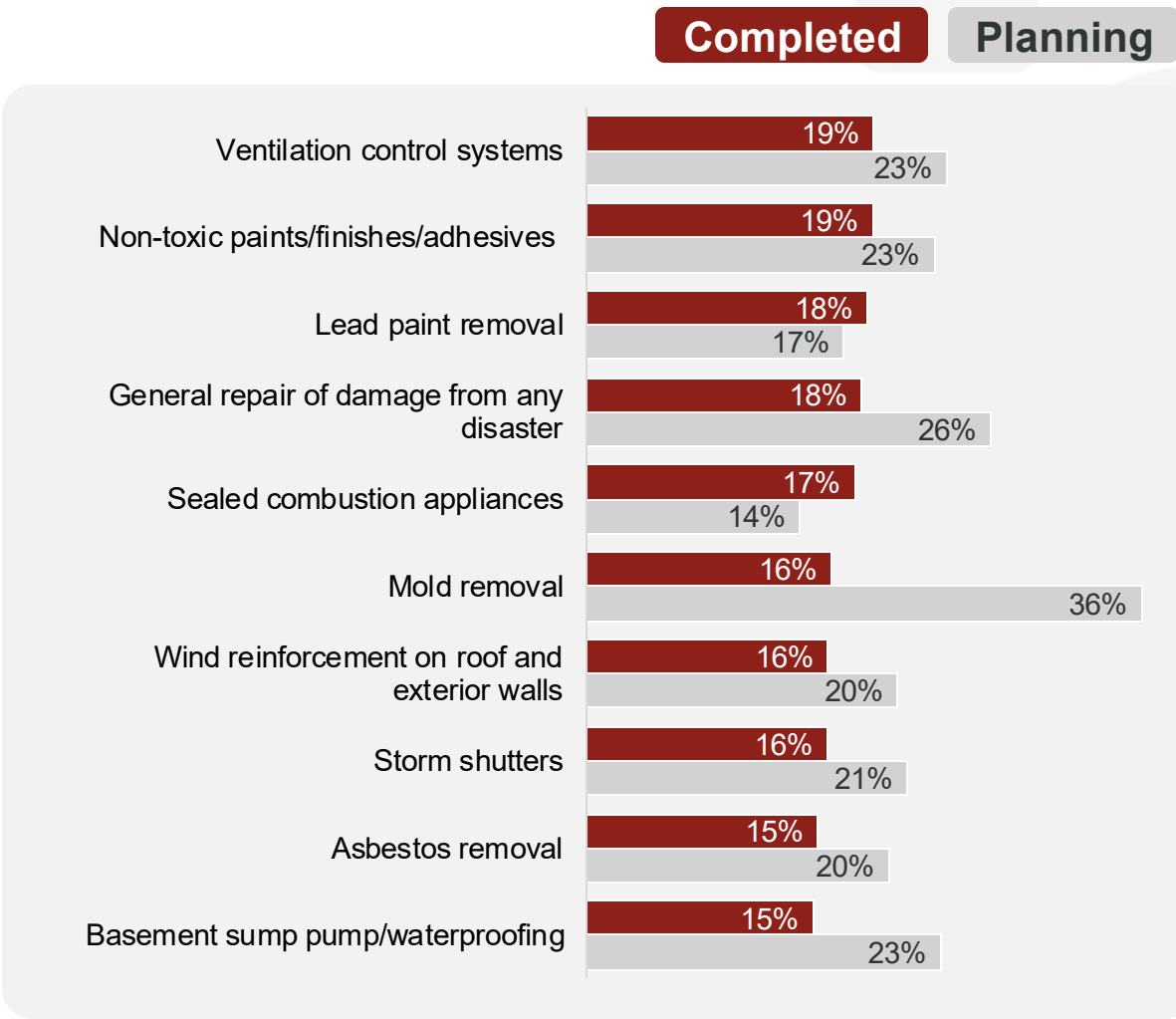
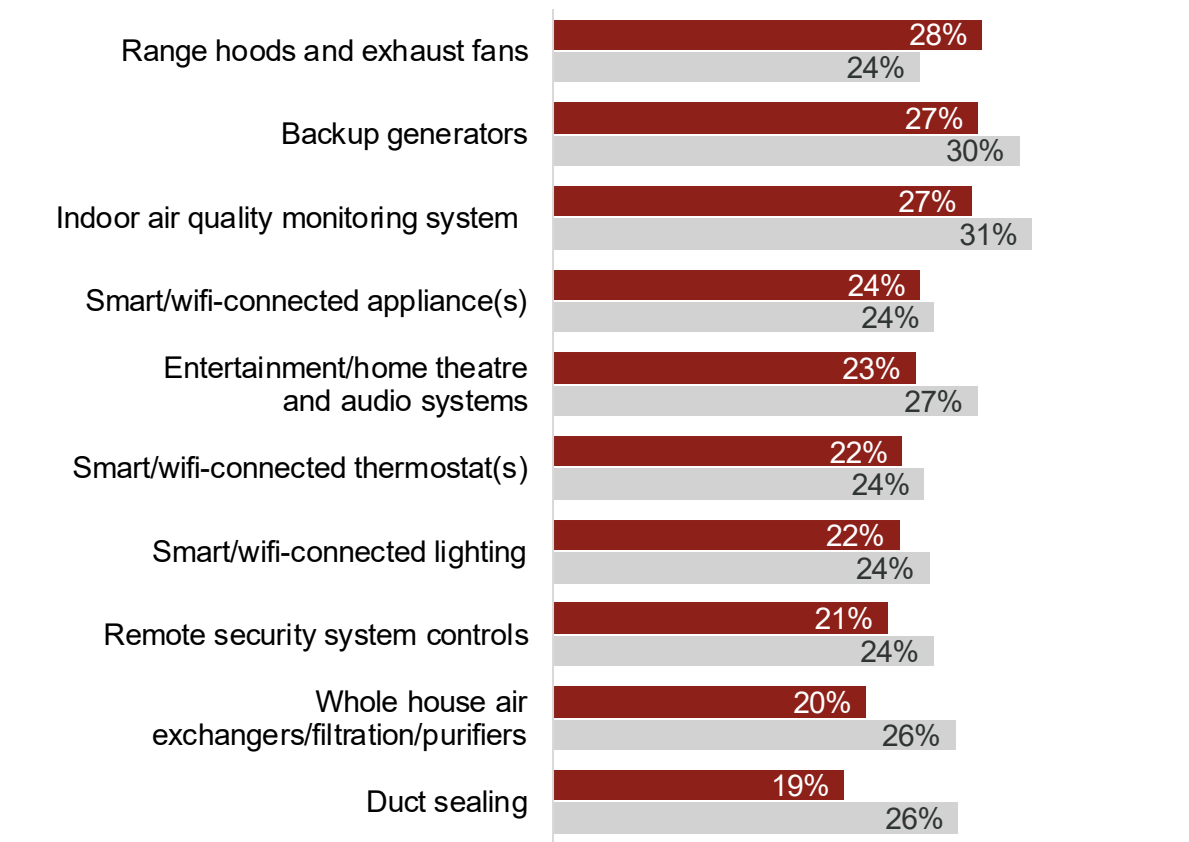




Air quality related products are most installed. Connectivity throughout the home has increased and should be addressed.

Top Healthy Home Activities Completed In The Past Year And Planning To Do

Among Homeowners who have home health or safety concerns (n=651)

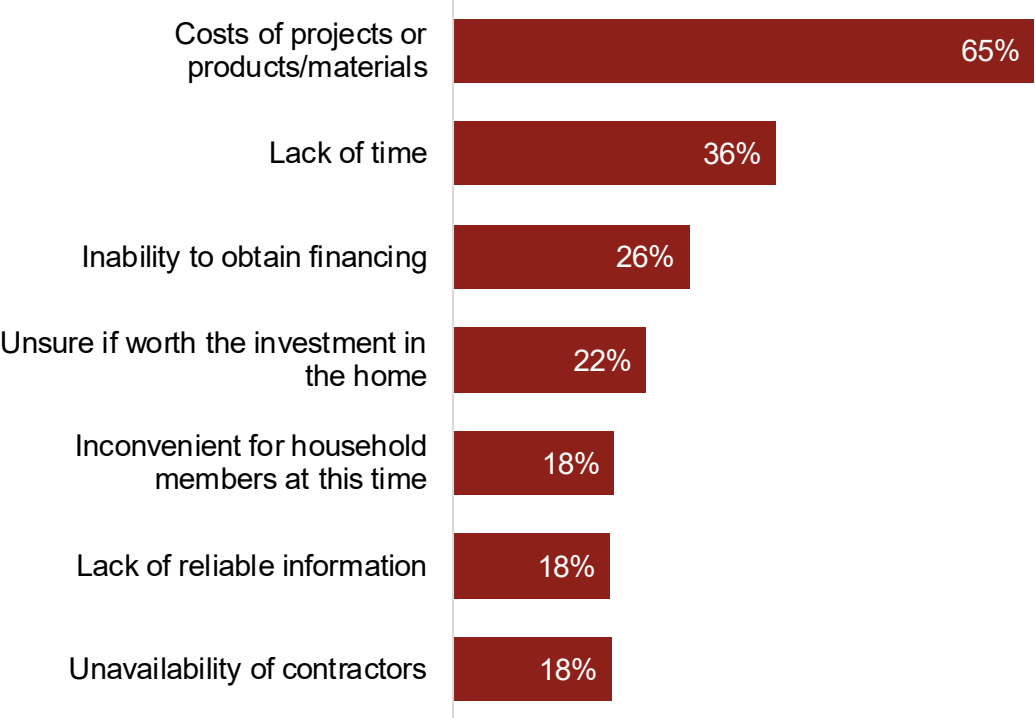




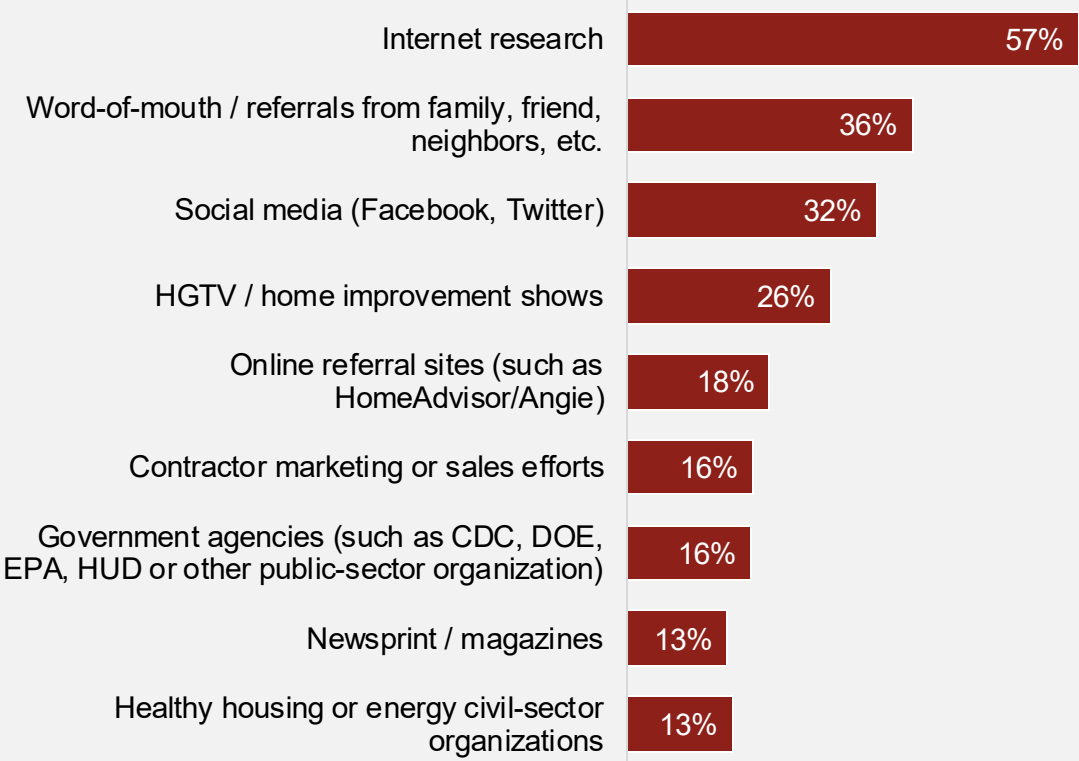
Cost remains the barrier and expected to increase as material and labor costs rise. Social media is increasing as a viable tool for education.

Among Homeowners who have home health or safety concerns

Obstacles Preventing Planned Projects (n=576)



Information Sources (n=651)



QH7. [IF RESPONDENT SELECTED ANY 'PLANNING TO DO IN FUTURE'] What obstacles do you feel are preventing your household from doing your planned projects*?

QH8. Where do you learn about remodeling projects or products associated with health and safety or environmental and energy performance*?

* “some of” removed in 2024
“accessibility and wellbeing” removed, and “environmental and energy performance” added in 2024
^ “or energy added in 2024





THE
Farnsworth
GROUP

1

Healthy and Safe Home

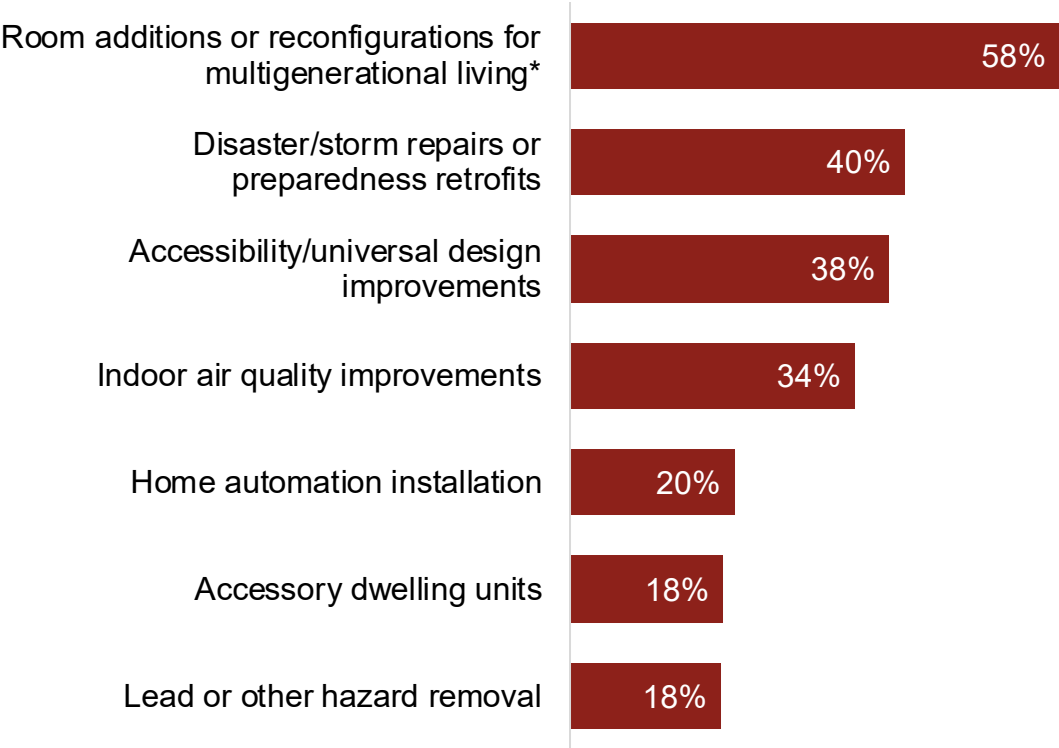
Contractors



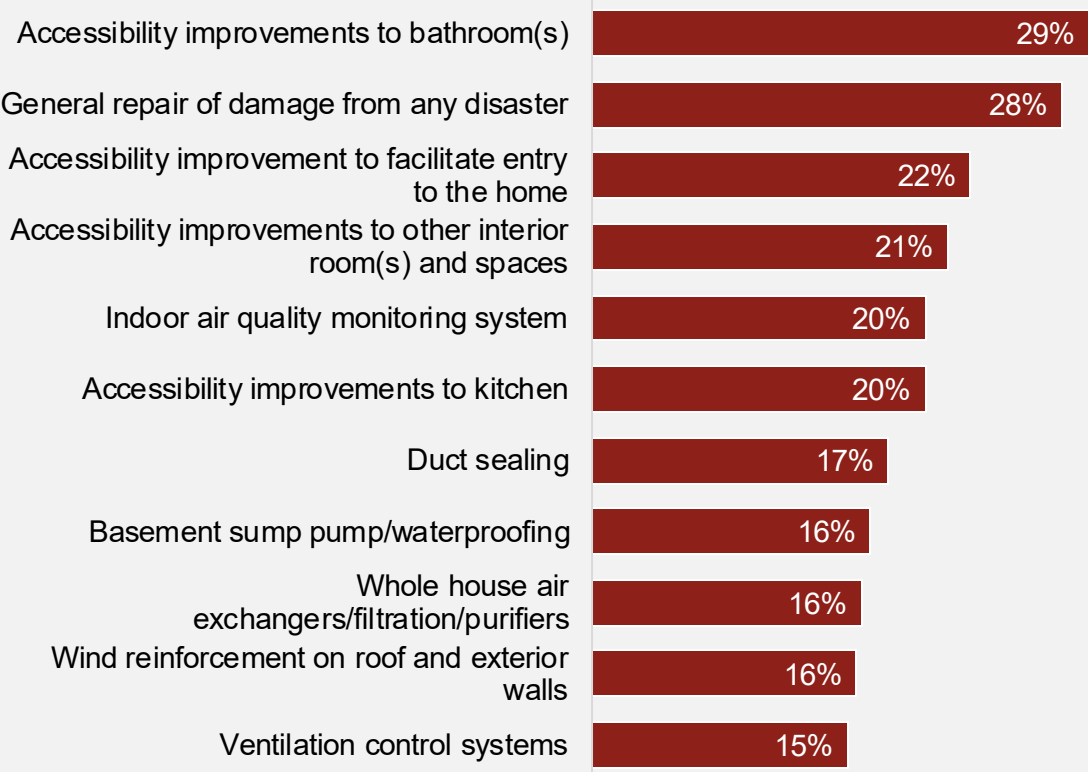


Disaster and Aging in Place are common projects among Generalists with air quality further down. This is somewhat counter to Homeowner concerns.

Company Installed/Offered By Major Category In Past Three Years



Top Completed Specific Projects In the Past Year



(n=373)

QP4. Which of the following categories describe residential remodeling activities that your company has installed or offered in the last three years?

QP6.To the best of your knowledge, which of the following remodeling activities has your company or your subcontractors installed in the last year?

* “for multigenerational living” added in 2024

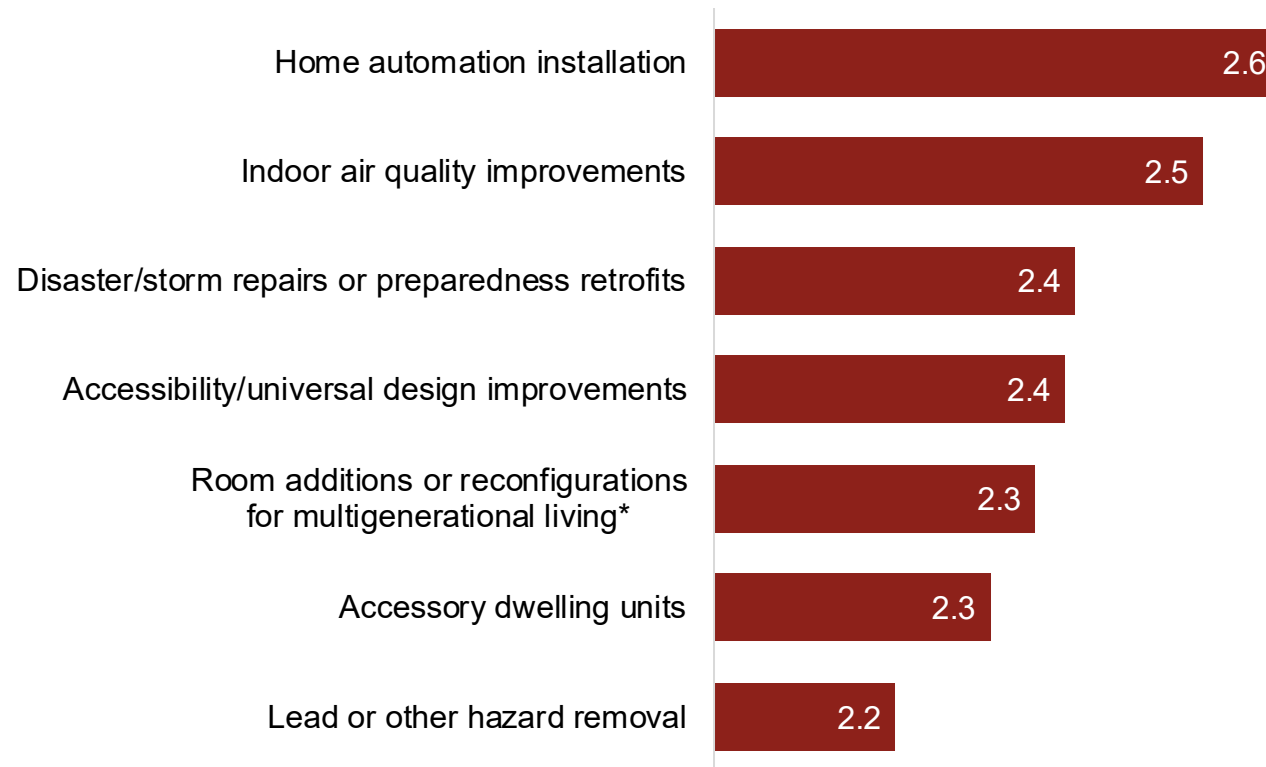




However, air quality and automation installs are growing.

RESIDENTIAL HEALTHY HOME CHANGES IN THE LAST YEAR – MEANS BY CATEGORY

(n=373)



3 = Increased
2 = Stayed the same
1 = Decreased

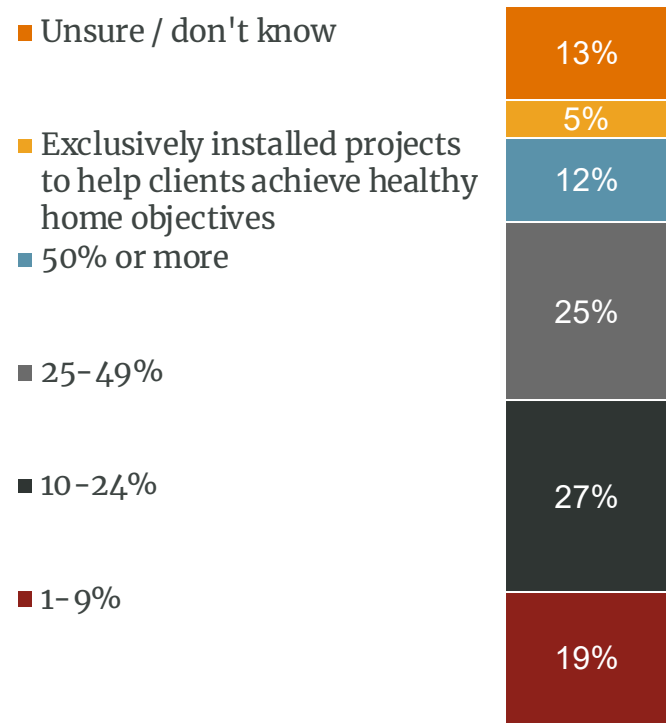




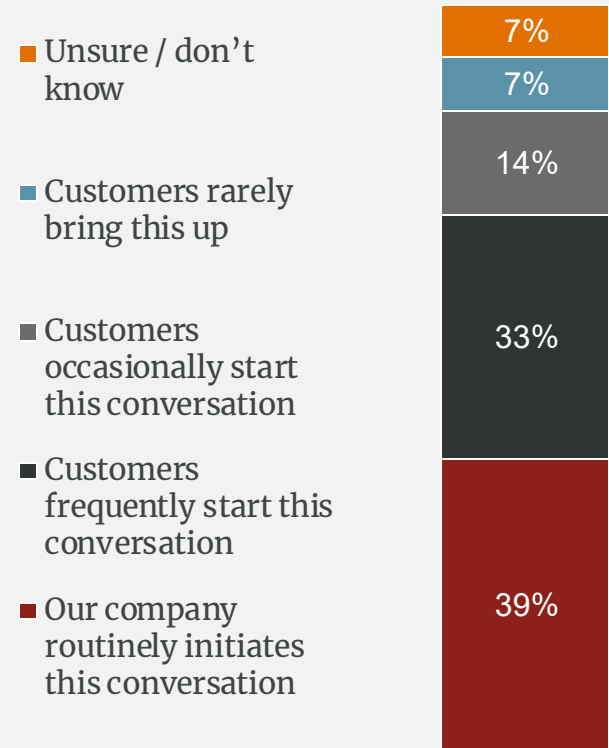
71% of contractors incorporate healthy or green objectives into less than half their projects. With homeowners starting the conversation most of the time given their increasing knowledge.

HEALTHY OR GREEN HOME SHARE, CONVERSATION STARTER, AND HOMEOWNER KNOWLEDGE
(n=373)

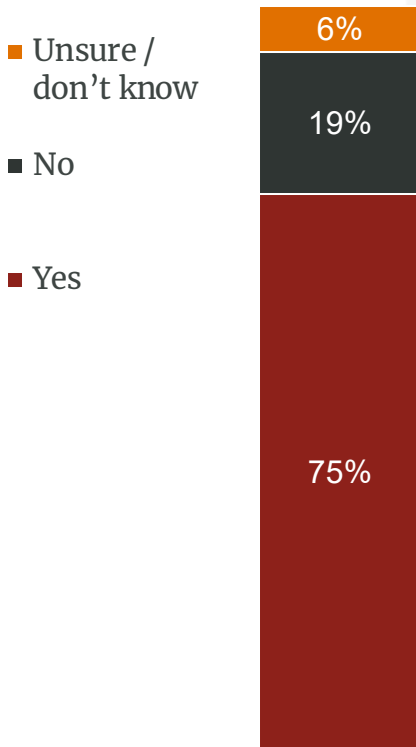
Project Share



Who Starts the Conversation



If Homeowners are More Knowledgeable than 5 Years Ago



QP7. Over the past year, about what share of your remodeling projects (on a dollar basis) helped clients achieve an occupant health and safety* or environmental and energy performance objective?
QP8. Who generally starts the conversation about incorporating components of health and safety or environmental and energy performance in a remodeling project?
QP9. Are you finding that homeowners are more knowledgeable about remodeling activities associated with health and safety or environmental and energy performance than they were 5 years ago?

* “wellbeing” removed, and “environmental and energy performance” added in 2024

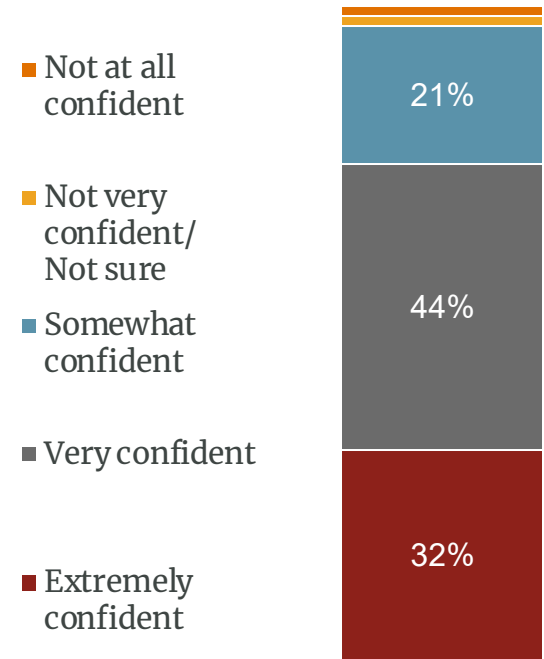




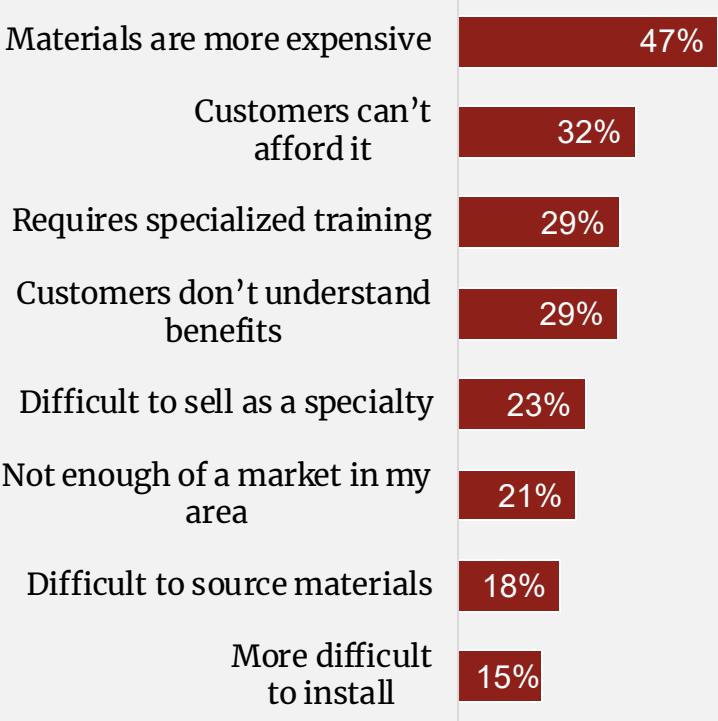
Contractor confidence is growing, though increasing costs will remain a barrier.

CONFIDENCE WITH ADVISING CLIENTS, CONSTRAINTS & BENEFITS OFFERING HEALTHY HOME PROJECTS
(n=373)

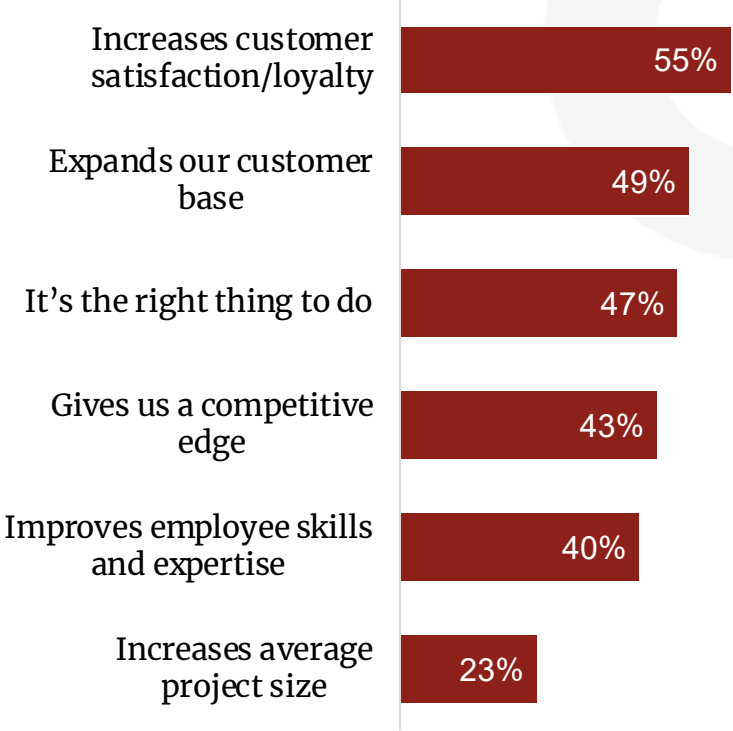
Confidence Advising Clients



Constraints



Benefits





Pros are more reliant on their network for information – other pros, suppliers, manufacturer. Training is very fragmented.

Most Helpful Healthy or Green Resources

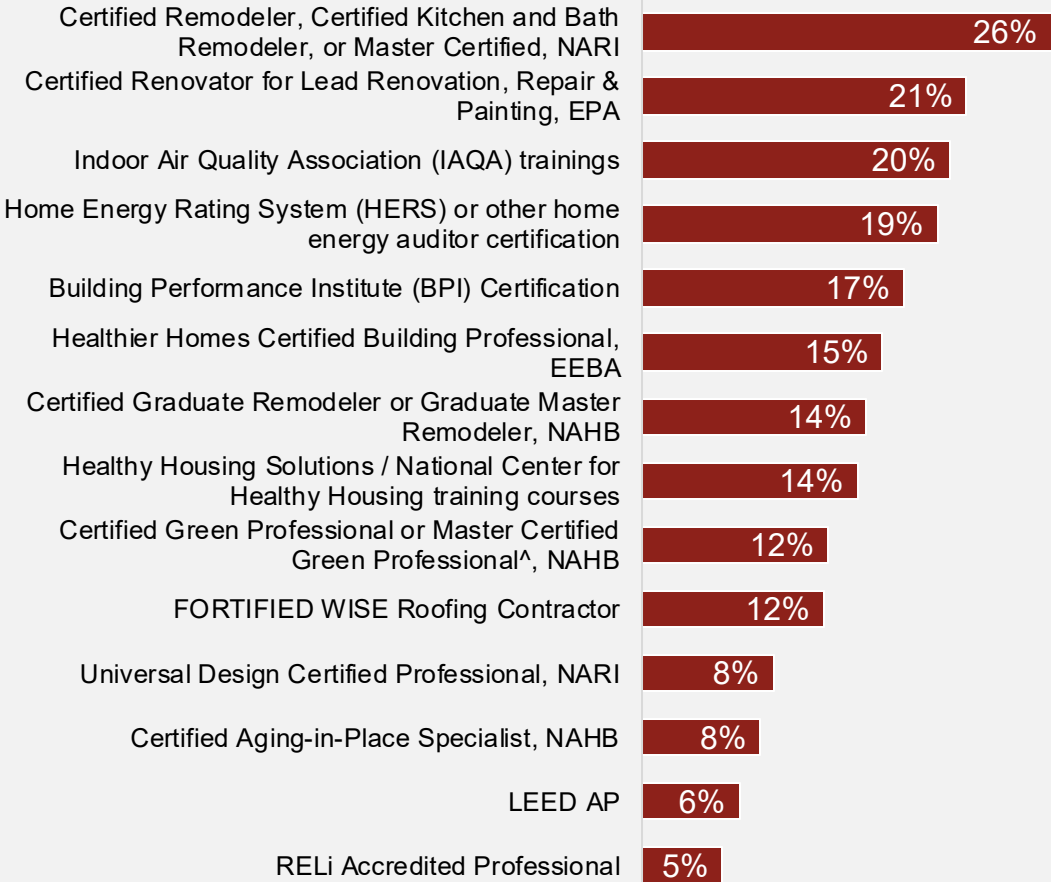


(n=373)

QP10. Among the following sources of information on remodeling activities associated with health and safety or environmental and energy performance*, please indicate the resources you find most trustworthy and/or helpful to your current business practice.

QP12. Have you or any of your employees or subcontractors ever participated in the following training or certification programs*?

Training and Certifications by Employees and Subcontractors



* “wellbeing” removed and “environmental and energy performance” added in 2024

^ “or energy” added in 2024





Environmental and Energy Performance



2

Environmental and Energy Performance

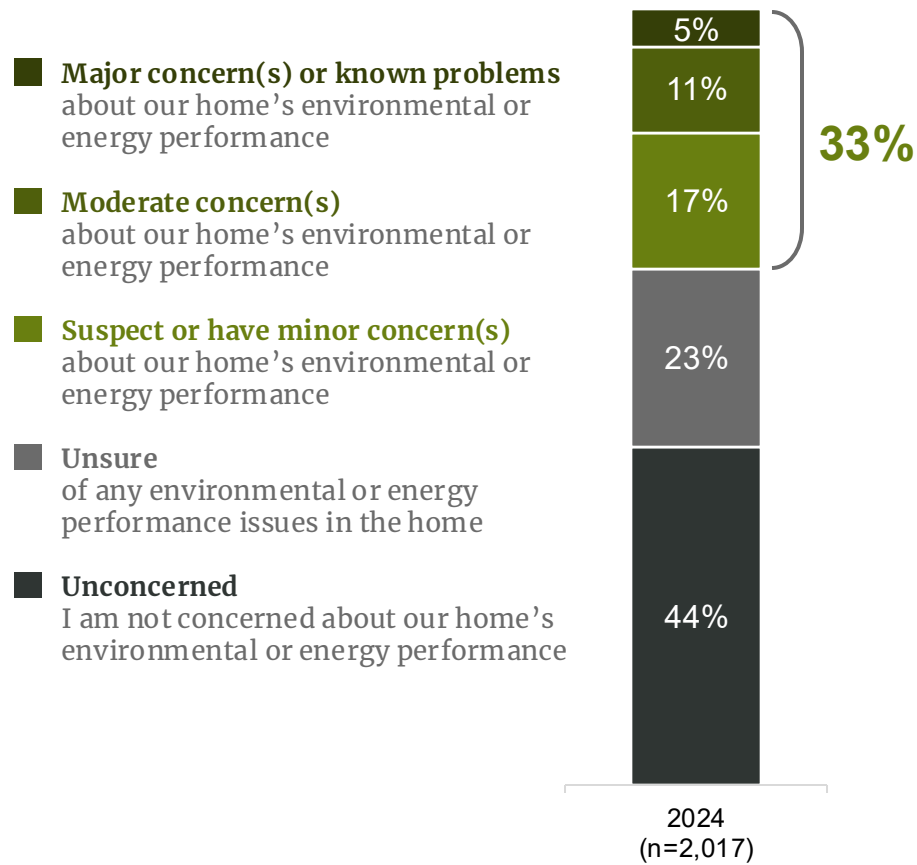
Homeowners





Like Healthy Home, those with children, younger, and higher ed. are more concerned about Environment and Energy.

Homeowner Concern Levels About Home’s Environmental Or Energy Performance



Homeowners Who **Are Concerned** Vs. **Not Concerned** About Home’s Environmental or Energy Performance

(n=2,017)

17% were “Unsure” about their concern level

		Concerned Total 33%	Unconcerned Total 44%
Gender	Male	34%	45%
	Female	33%	43%
Age	Under 35 years	32%	34%
	35 to 54 years	44%	37%
	55 years and older	26%	55%
Children	In home	47%	33%
	Not in home	29%	47%
Household Income	Less than \$50K	33%	45%
	\$50K to \$99K	29%	44%
	\$100K+	38%	42%
Education	High school or less	27%	50%
	Some college/associates	32%	45%
	College degree	37%	38%
	Graduate degree	44%	38%

23% were “Unsure” about their concern level

New in 2024

QH5b. In the past year, how concerned have you been about your current home’s environmental or energy performance?

Click [here](#) to see the data in graph form

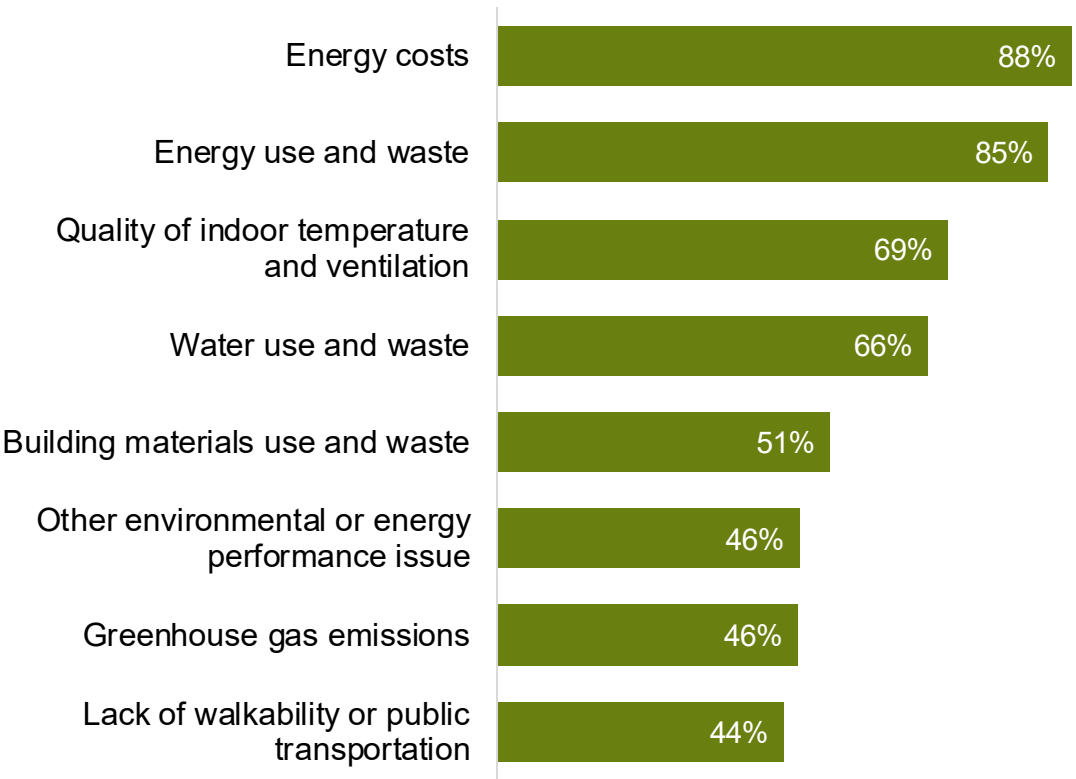




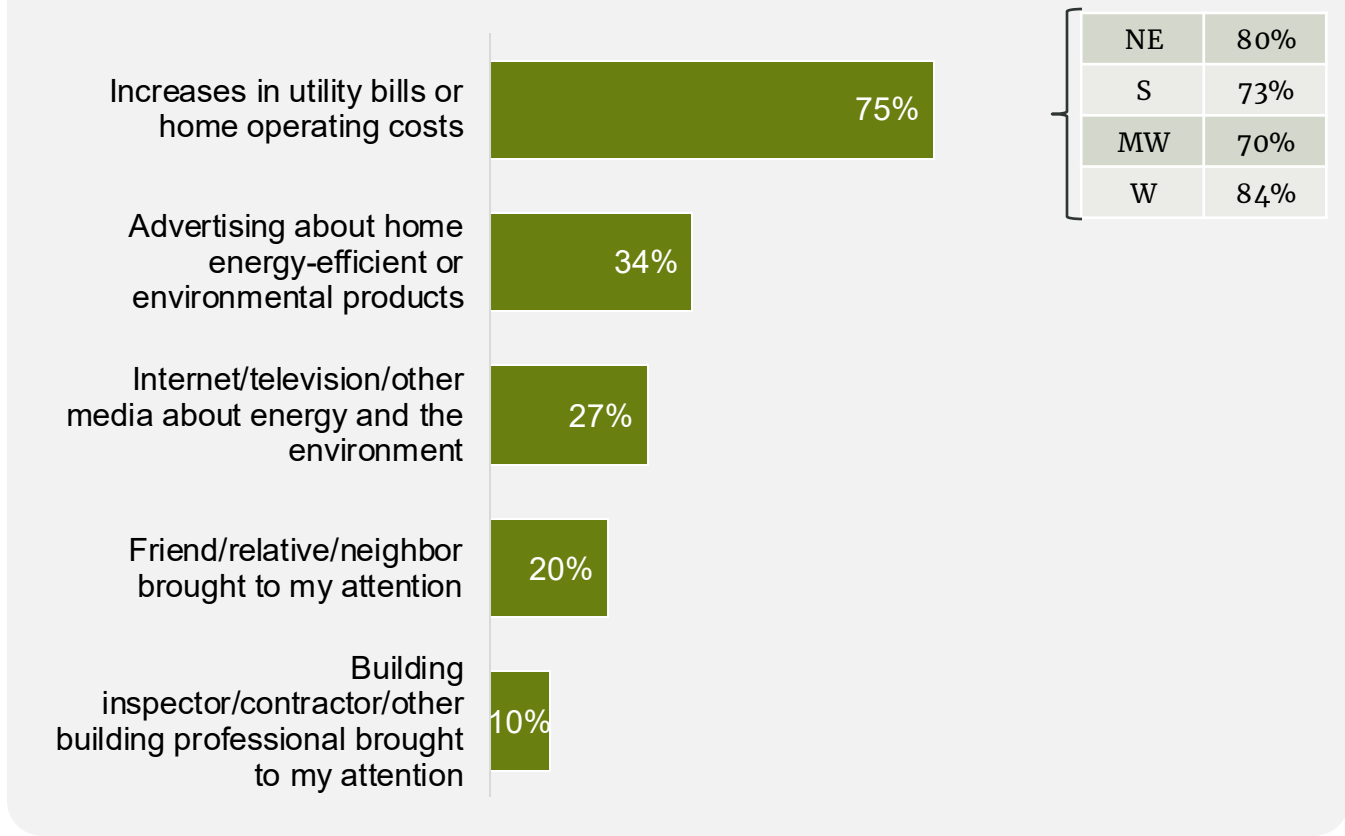
Homeowners are concerned about costs, consumption, and comfort. This suggests a balance of doing good but getting something back.

% Very Or Somewhat Concerned About Their Home's Environmental or Energy Issues And Why
Among Homeowners Who Have Environmental or Energy Concerns (n=673)

Issues of Concern



Reasons for Concern



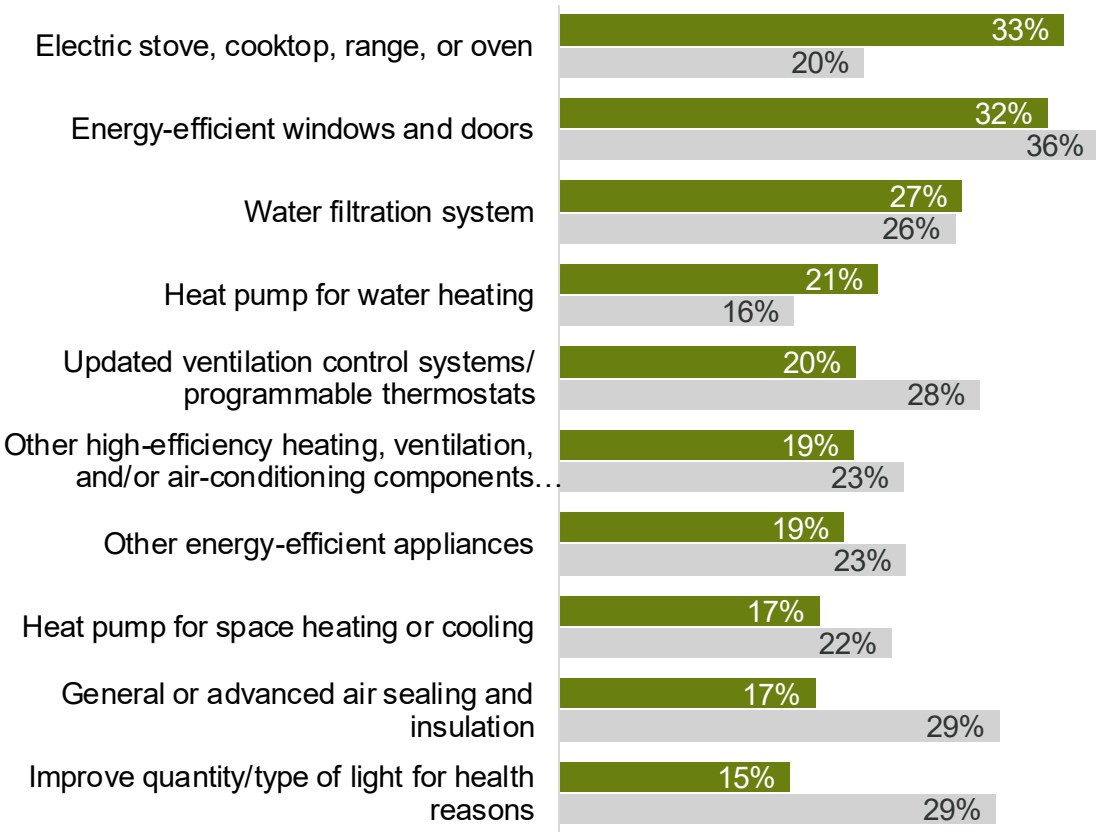
QH5c. [IF HAS ENVIRONMENTAL OR ENERGY CONCERNS] Of the following issues, how would you rate your level of concern regarding your current home's environmental or energy performance?
QH5e. [IF RESPONDENT IS SOMEWHAT OR VERY CONCERNED FOR AT LEAST ONE ENVIRONMENTAL OR ENERGY PERFORMANCE ISSUE] Which of the following reasons have let to the concerns you selected below?



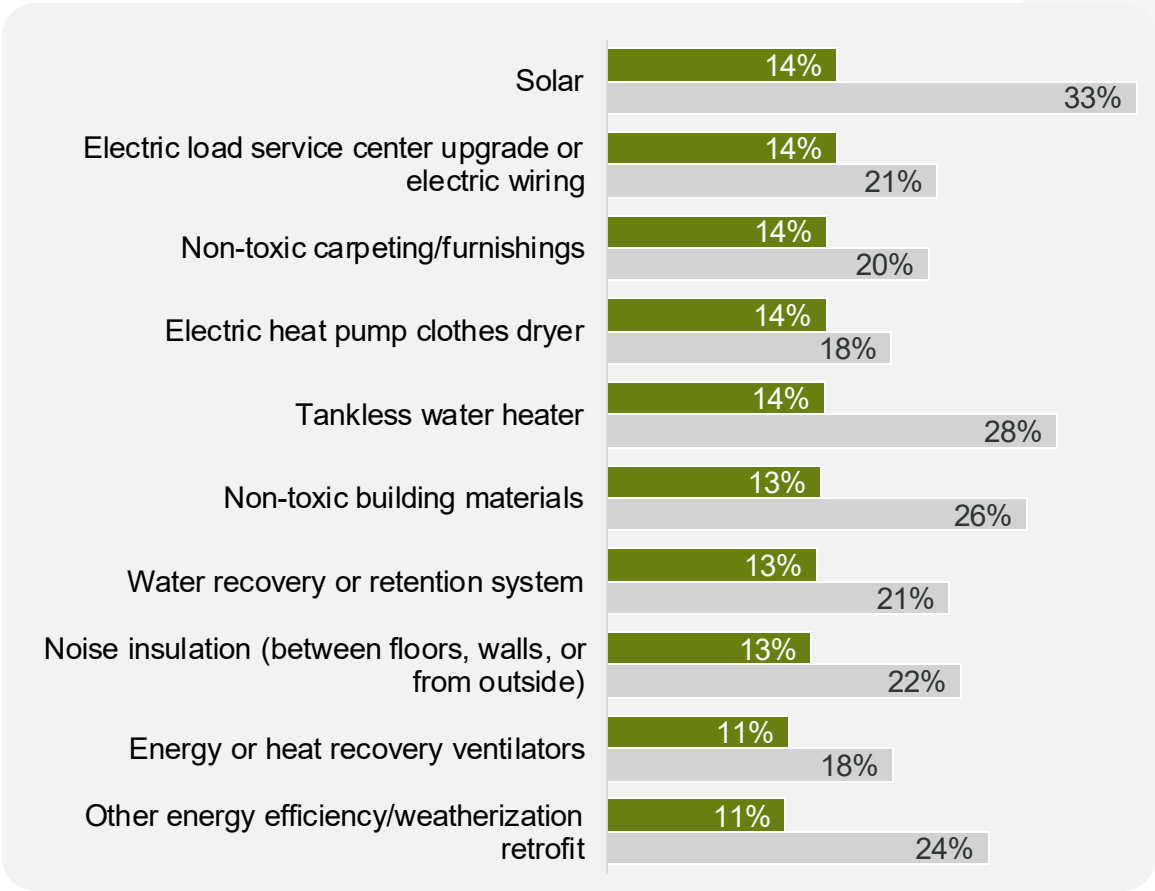
Products that address utility costs, air quality, and water quality lead the way.

Top Environmental or Energy Activities Completed In The Past Year Or Planning To Do

Among Homeowners who have environmental or energy concerns (n=673)



Completed Planning

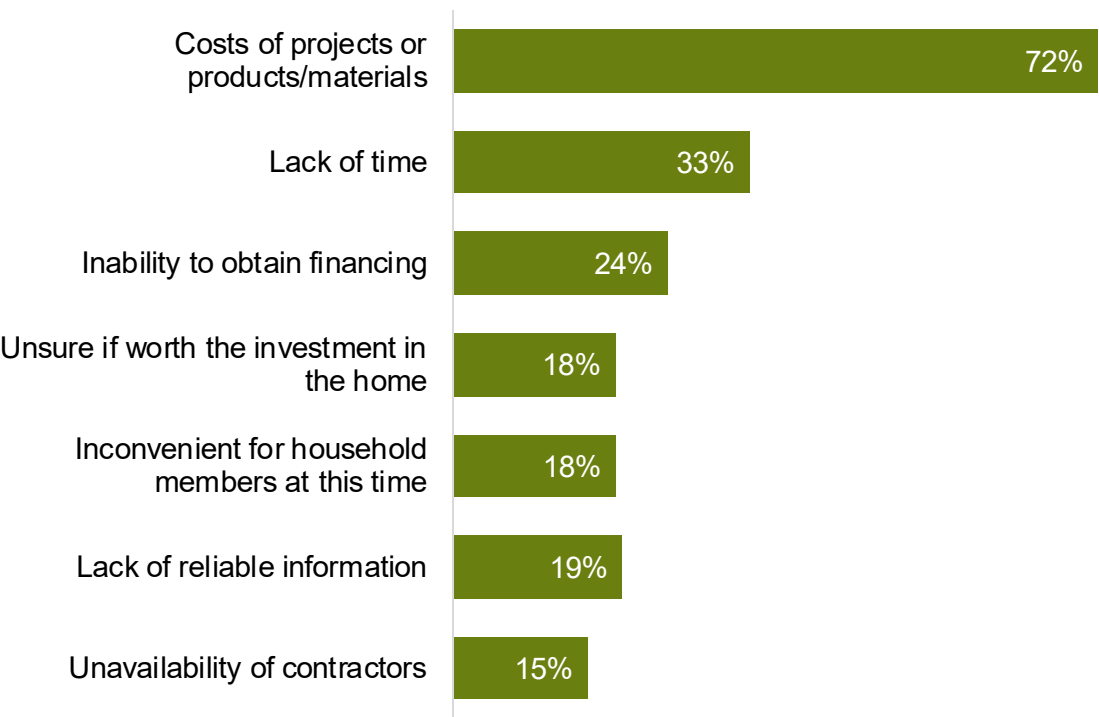




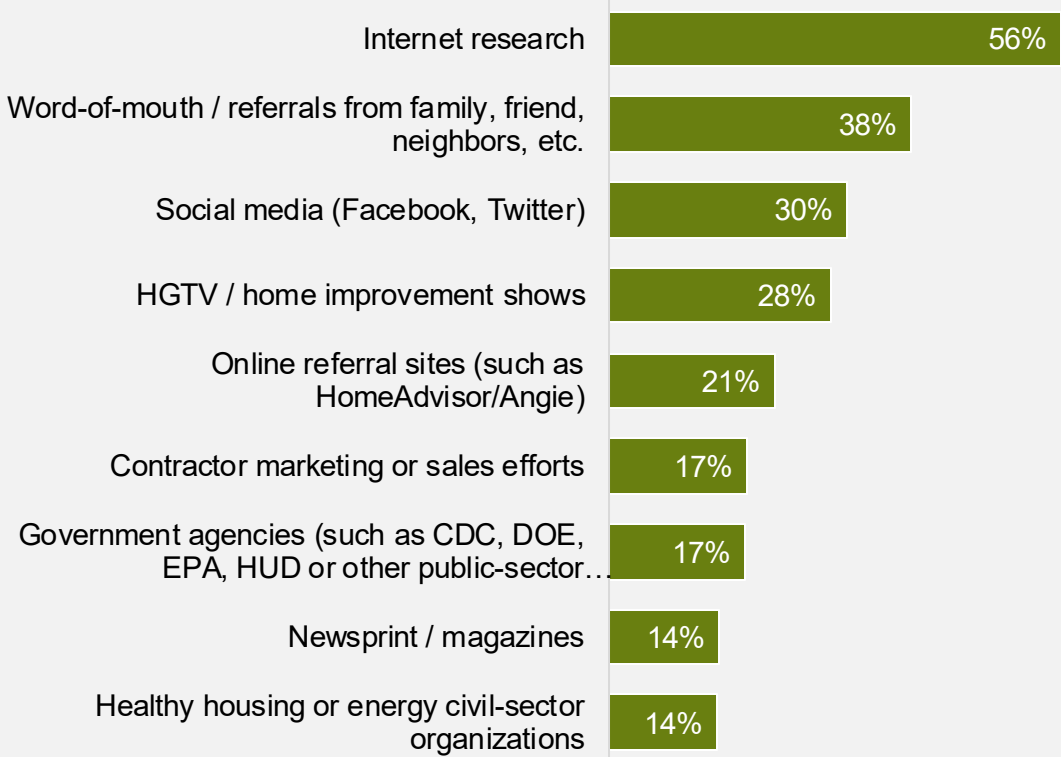
Cost is a bigger barrier to green, environmental projects compared to healthy home, yet the mediums of education are consistent.

Among Homeowners who have environmental or energy concerns

Obstacles Preventing Planned Projects (n=600)



Information Sources (n=673)



* “some of” removed in 2024
“accessibility and wellbeing” removed, and
“environmental and energy performance” added in 2024
^ “or energy added in 2024





2

Environmental and Energy Performance

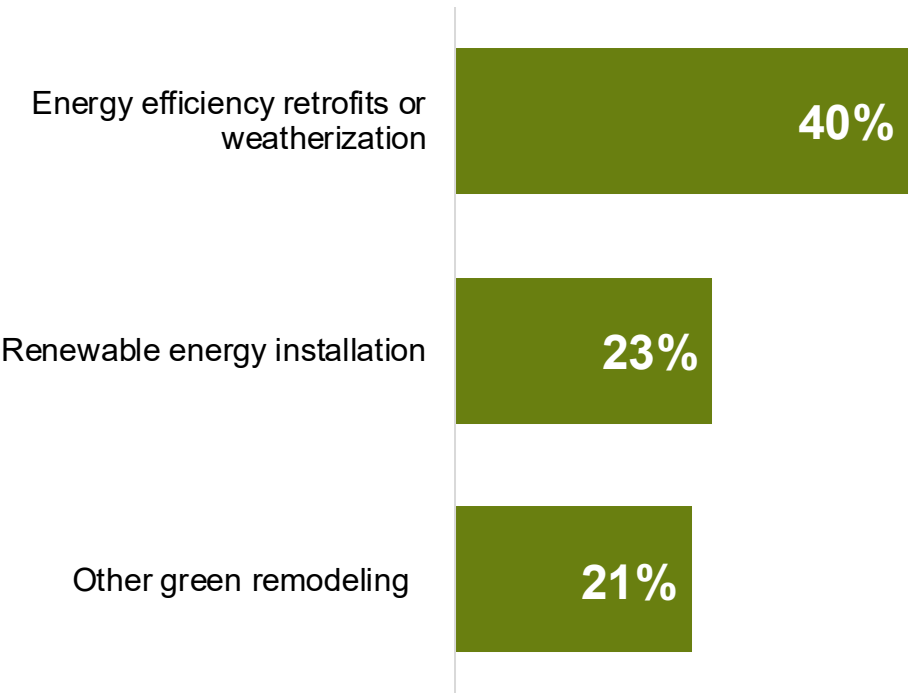
Contractors





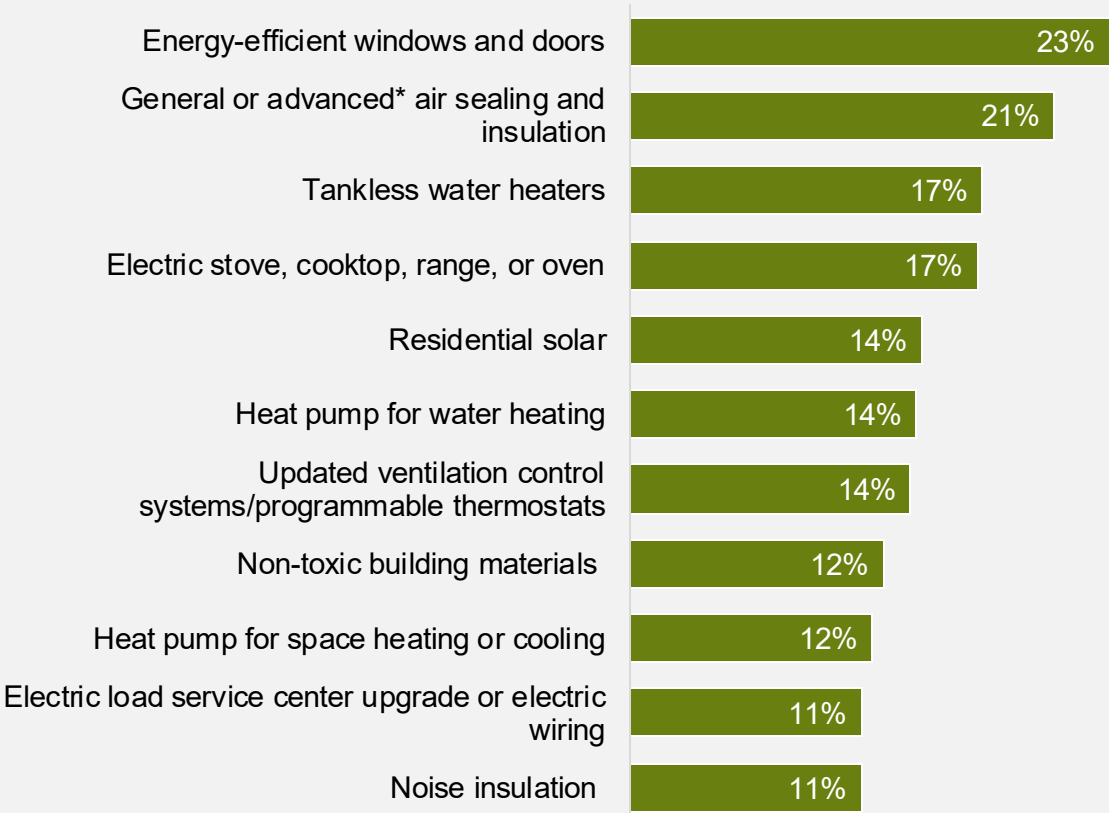
Contractors installed energy efficiency retrofits nearly twice as often as renewable energy projects over three years. This aligns with homeowner desires to reduce utility costs.

Company Installed/Offered By Major Category In Past Three Years



(n=373)

Top Completed Specific Projects In the Past Year



* “or advanced” added in 2024



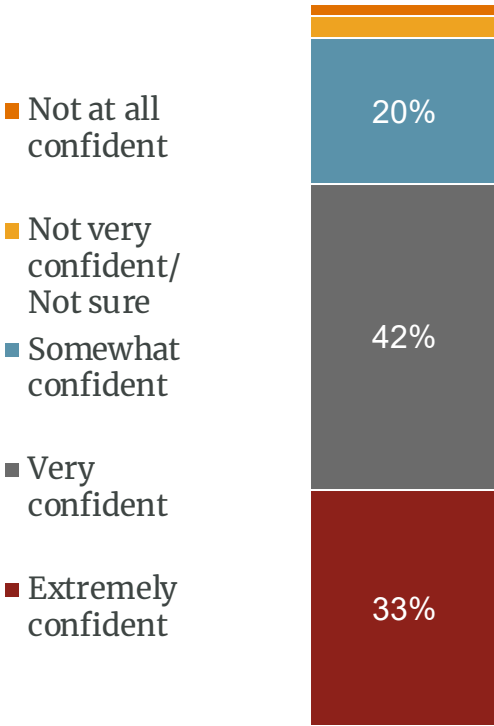


Contractors are becoming more confident with their advice on environmental and energy performance projects. However, costs are expected to become more of a barrier along with possible labor challenges for specialized training.

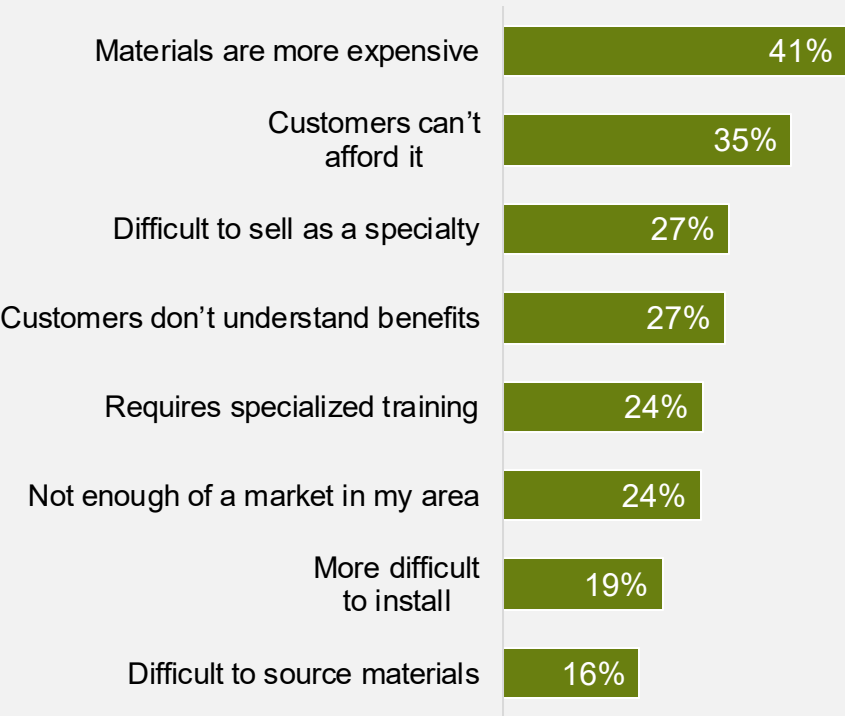
CONFIDENCE WITH ADVISING CLIENTS AND CONSTRAINTS OFFERING GREEN REMODELING PROJECTS

(n=373)

Confidence Advising Clients



Constraints



Implications and Considerations



Slow, Steady & Connected

Homeowners have returned to pre-pandemic trends, which see slow growth in concerns and projects. Maintain focus on key areas that remain popular: air and water and consider products with feature enhancements rather than net new. And make sure they work with other devices.



ROI is a Reality

Younger, wealthier, educated homeowners have greater desires to help the environment. BUT – they expect a return in the form of costs or comfort benefits. Communicate measurable returns or product performance as much as sentimental returns.



Pros May be Lagging

Pros may not be leading the conversations with Homeowners and may be missing Healthy Home or Environmental opportunities. Leverage homeowners for a pull through strategy to engage more pros into growing categories.



Costs, Labor = Barriers

Costs are the biggest barrier for adoption, which is often the case for newer tech. These products also require skilled labor. Consider products that can minimize challenges through a range of Good, Better, Best that deliver on ease of install.



Improved Market Strategy With Customized Research



Customer Behaviors & Attitudes

- Learn where customers shop, when and why to identify marketing and sales opportunities through the path to purchase
- Profile customers for effective targeting
- Quantify product usage to define market opportunity
- Prioritize selection criteria to know what you must deliver



Brand Health & Performance

- Monitor brand performance to measure marketing success
- Capture brand perceptions to define market position
- Understand brand equity to improve category growth success
- Define brand usage to determine share opportunity



Product Development & Pricing

- Explore product uses and needs to establish viable concepts
- Validate concepts to increase adoption at launch
- Define price & feature combinations to win at point of sale
- Determine preferred messaging and packaging to attract buyers



Market Sizing & Structure

- Define total product sales volume to know market potential
- Define brand share to determine acquisition opportunity
- Define product distribution structure to inform channel strategy
- Define share by customer type to develop marketing and sales strategy

Learn More About Our Services →

Custom Research for Building Products

Remove the Risk in Your Next Decision

Change is risky. That's why you need more than just the numbers to make the right decision. Get deep insights with useful recommendations from research tailored for YOU backed by over 30 years of building product industry expertise.

Book Your Consultation



Grant Farnsworth

303 886 5289

gfarnsworth@thefarnsworthgroup.com



Adam Mowrey

412 720 9447

amowrey@thefarnsworthgroup.com



Taylor Pence

317 241 5600 ex 110

tpence@thefarnsworthgroup.com



Karen Barnes

303 929 1635

kbarnes@thefarnsworthgroup.com

