



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.





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# Objectives

## Healthy and Safe Home

### Homeowners:

- Concerns
- Reasons
- Activities
- Obstacles

### Contractors:

- Customers' interest level
- Trends
- Benefits
- Constraints

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## Environmental and Energy Performance

### Homeowners:

- Concerns
- Reasons
- Activities
- Obstacles

### Contractors:

- Customers' interest level
- Trends
- Constraints





# Homeowner Profile



# Regions: Homeowners

**Midwest**  
25% | (n=495)

*(Population – 21%)*

**Northeast**  
18% | (n=353)

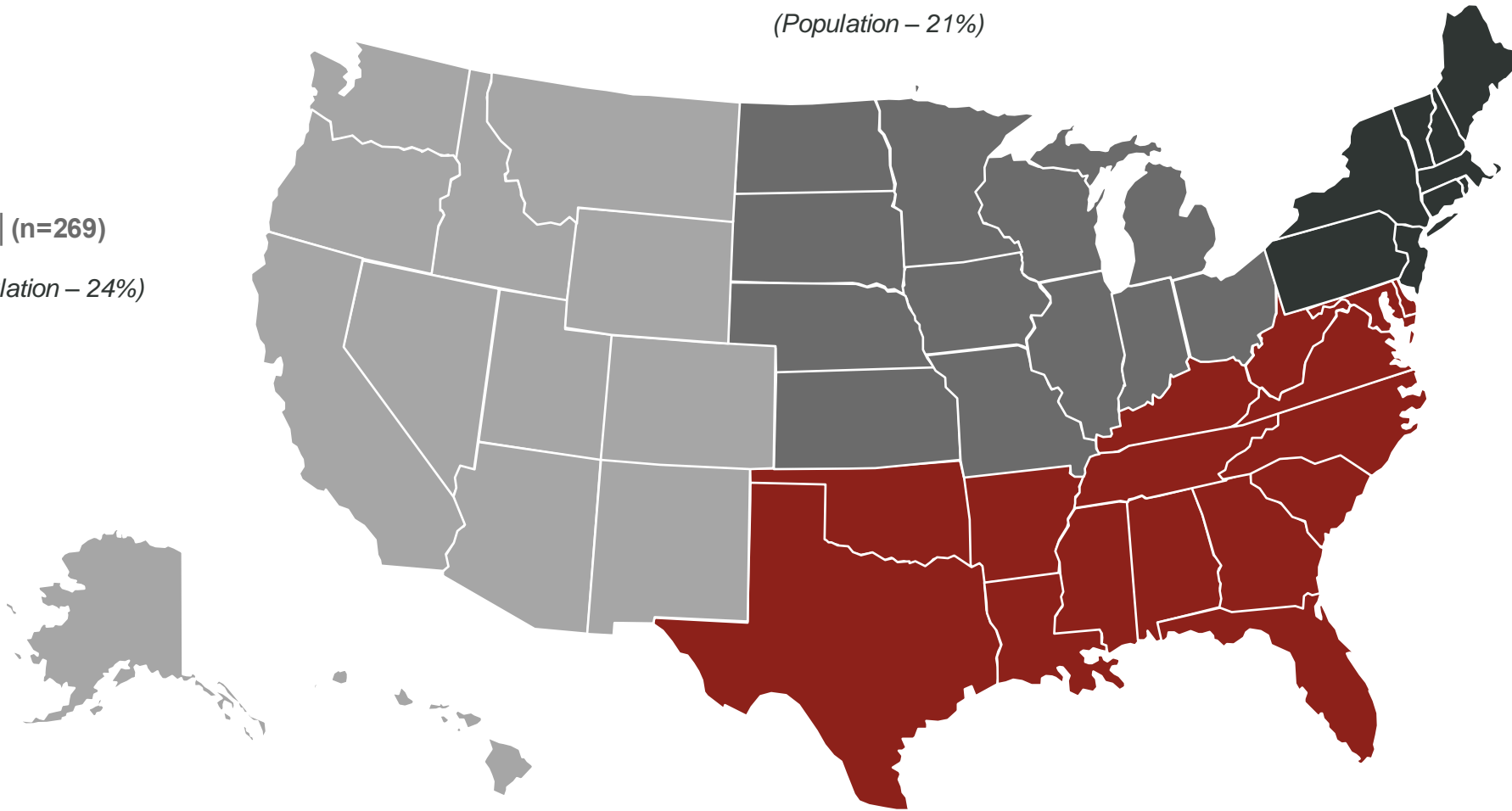
*(Population – 17%)*

**West**  
13% | (n=269)

*(Population – 24%)*

**South**  
45% | (n=900)

*(Population – 39%)*

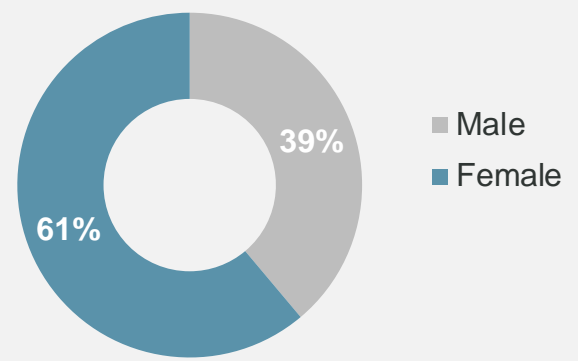




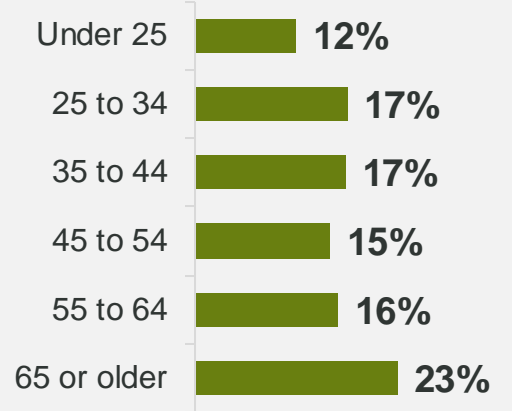


# Respondent Profile: Homeowners

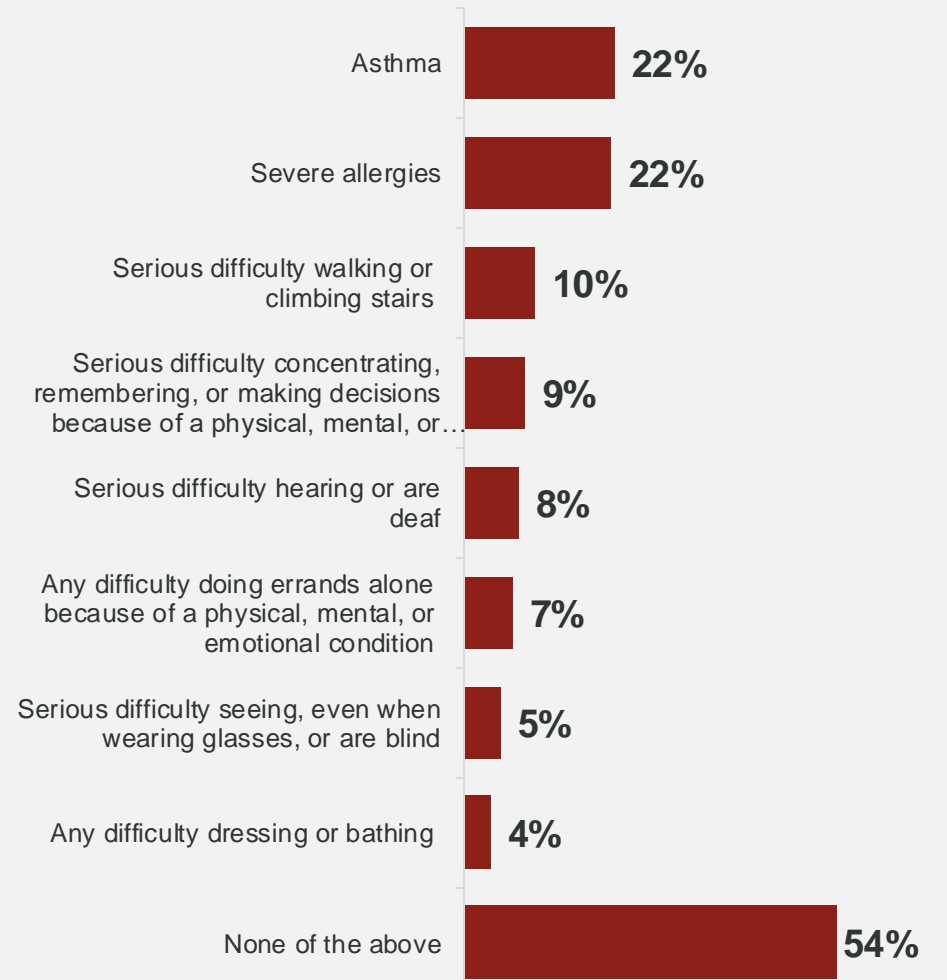
## Gender



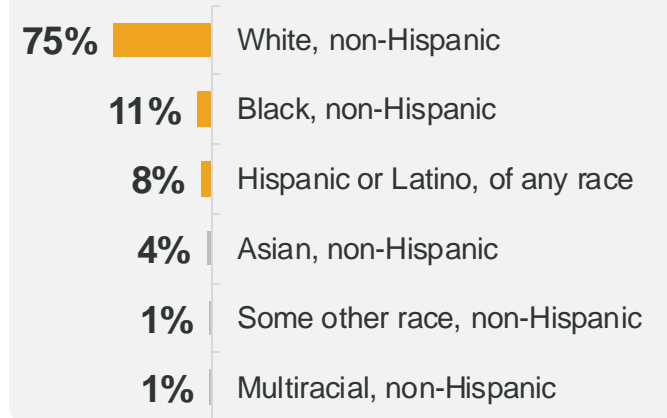
## Age



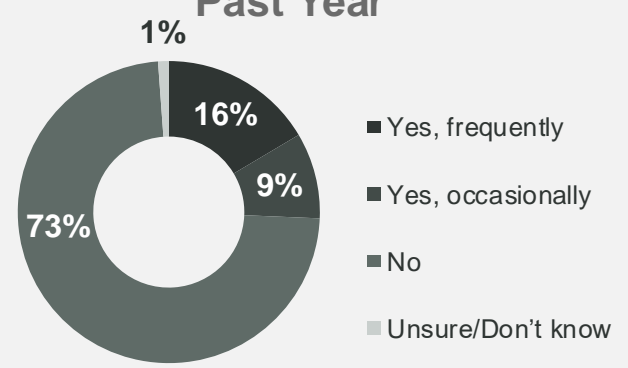
## Household Concerns



## Ethnicity



## Smoked Tobacco in Home in Past Year



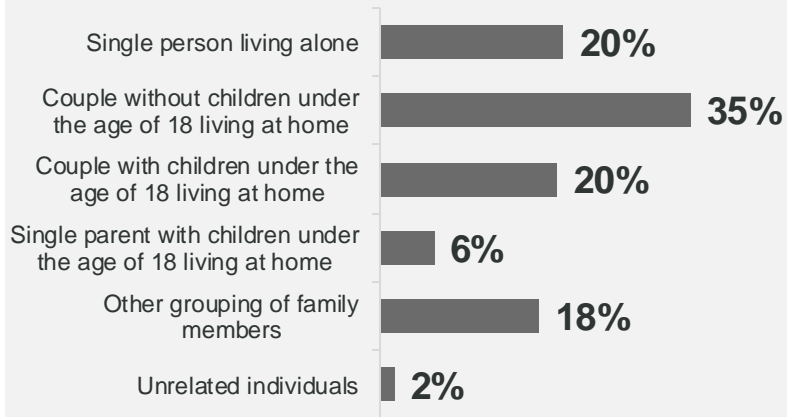
Q3. Please select the gender you identify with.  
 Q6. How large is your yard at your primary residence?  
 Q2. In which of the following industries do you currently work?

Q43. Which of the following best describes your ethnicity?  
 Q41. In what type of dwelling do you live?

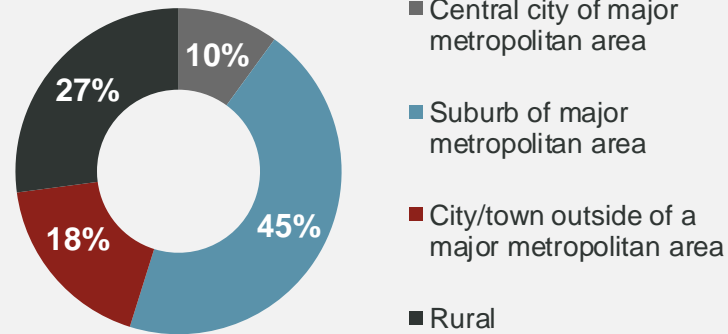


# Respondent Profile: Homeowners

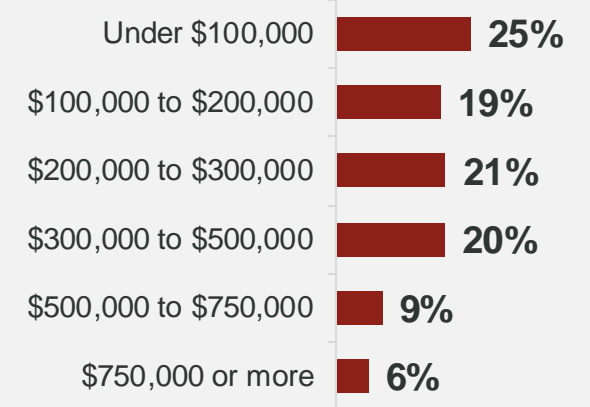
## Household Composition



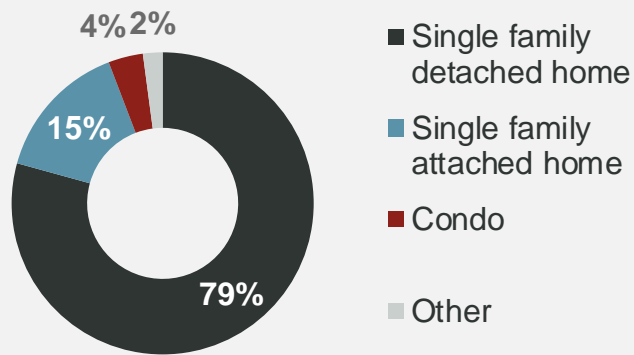
## Community Type



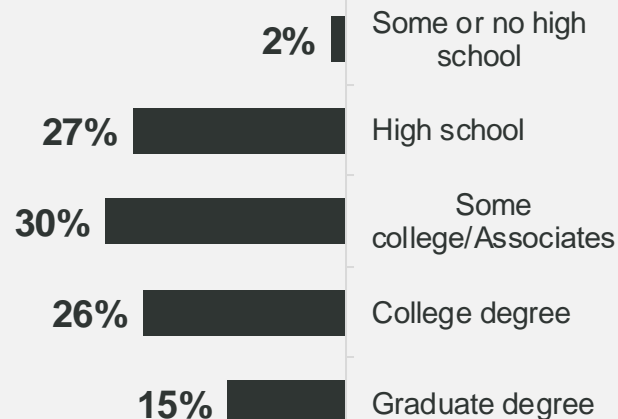
## Home Value



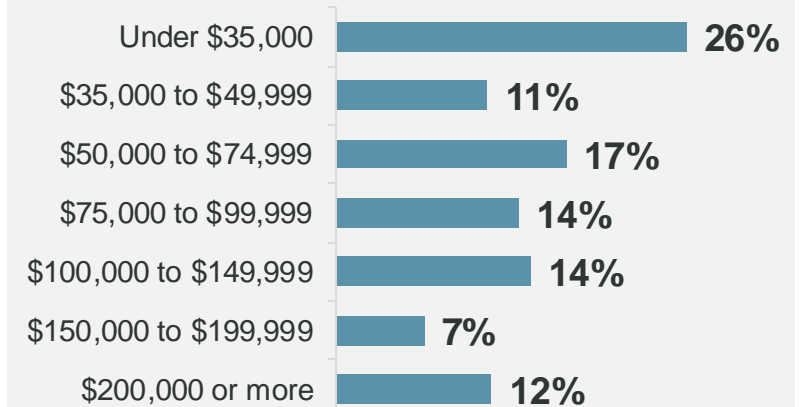
## Home Type



## Education



## Household Income



QH15. How would you characterize your household?  
 QH16. In what type of community do you live?  
 QH17. What would you estimate to be the current market value of your home?

QH2. Please select the type of home you live in:  
 QH18. Please describe the highest level of education you have attained.  
 QH19. What was your total combined household income in 2023?





# Contractor Profile



# Regions: Contractors

**Midwest**  
18% | (n=68)

*(Population – 21%)*

**West**  
18% | (n=67)

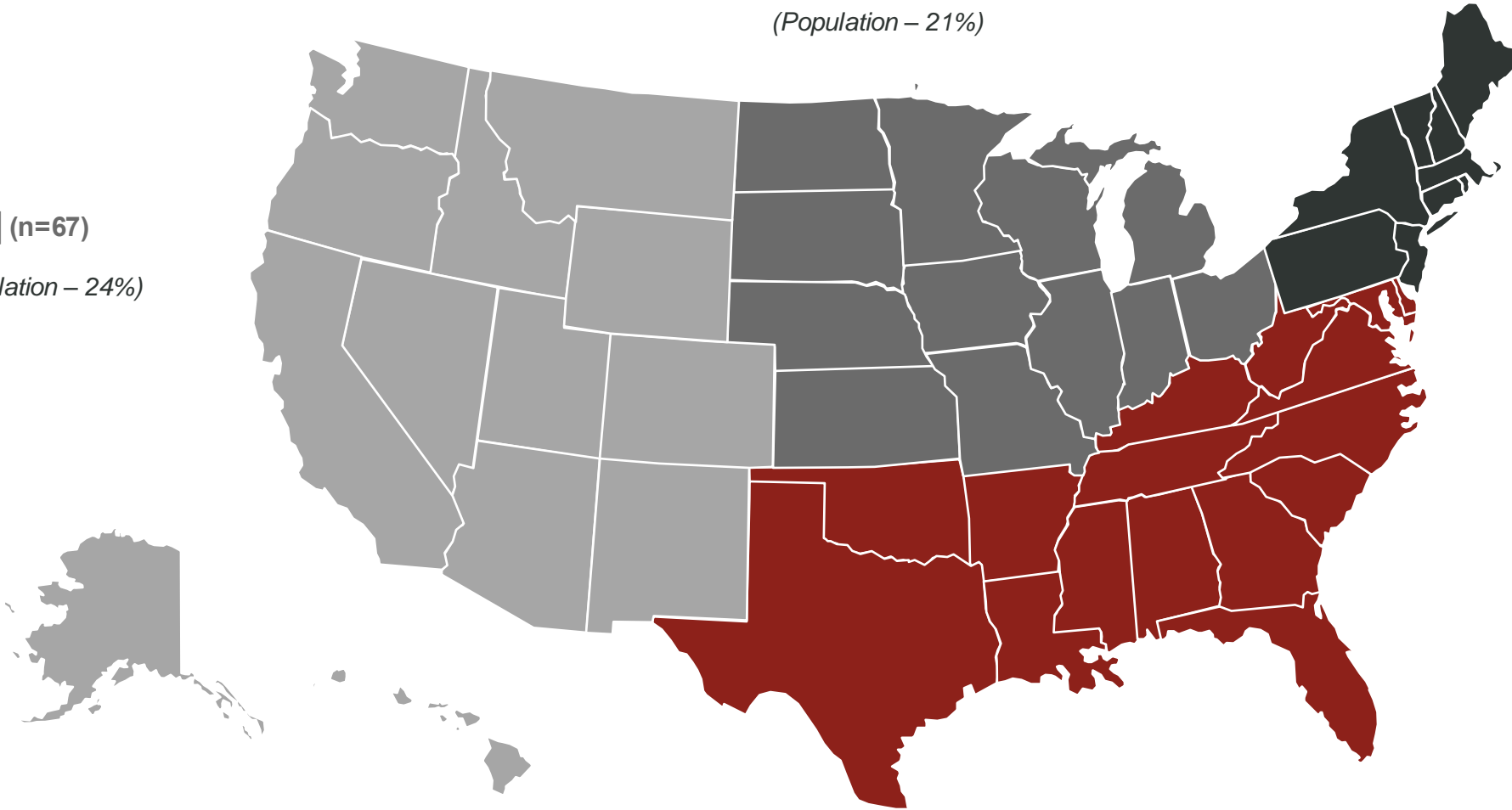
*(Population – 24%)*

**Northeast**  
17% | (n=62)

*(Population – 17%)*

**South**  
47% | (n=176)

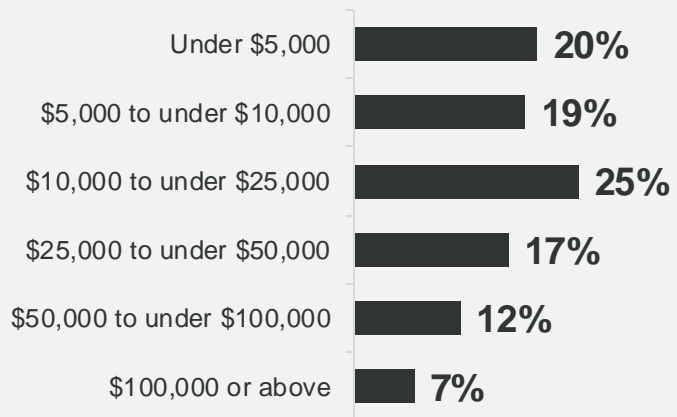
*(Population – 39%)*



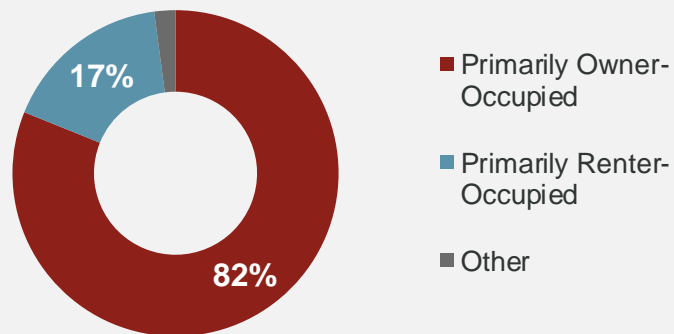


# Respondent Profile: Contractors

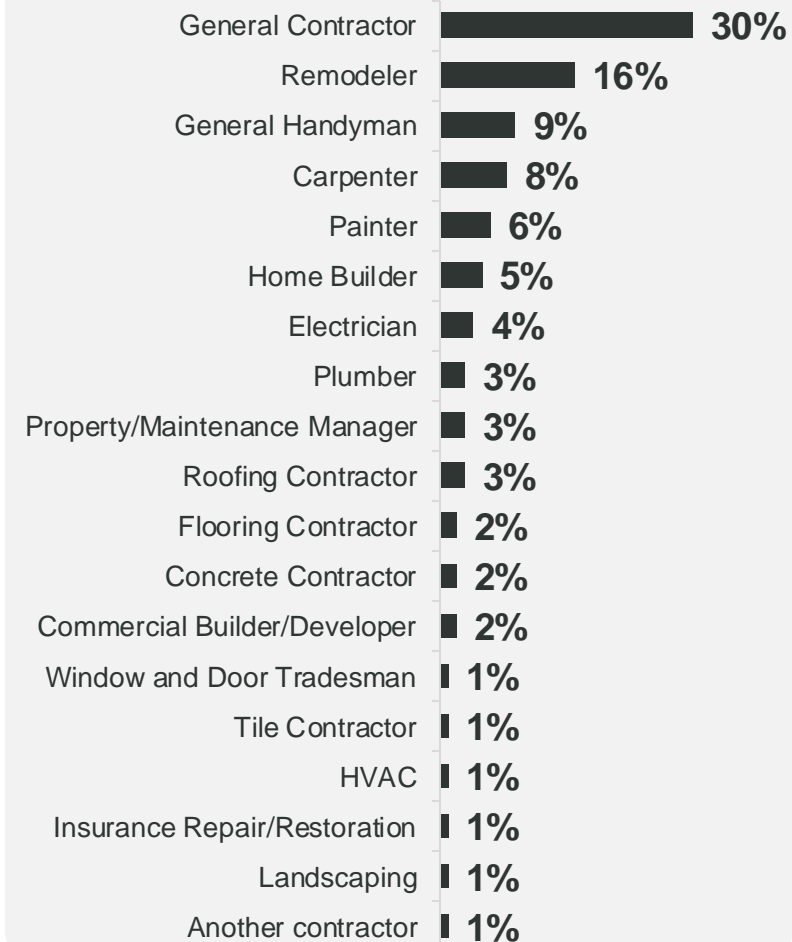
## Price Range of Projects



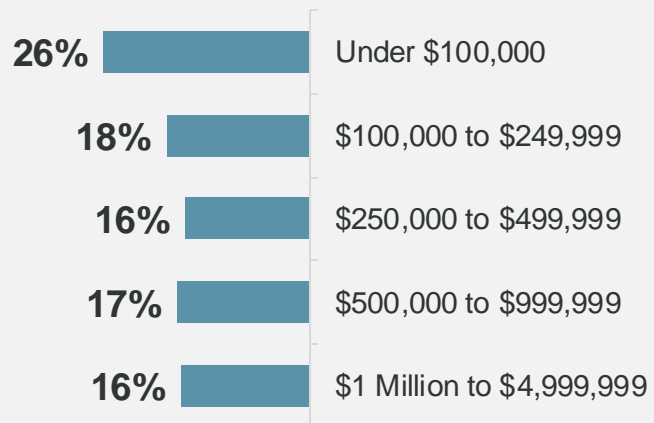
## Housing Units



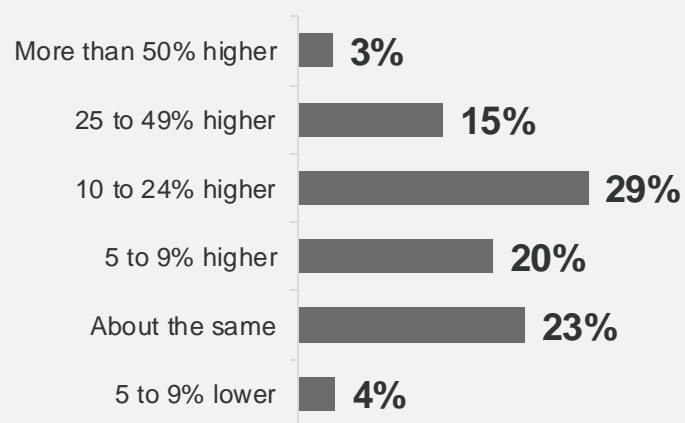
## Occupation



## 2023 Home Improvement Revenue



## Projected 2024 vs. 2023 Revenue



QP19. What was the typical price range of projects you completed over the past year?

QP20. What kinds of housing units did you work on most over the past year?

QP2. Which profession below best defines your occupation?

QP17. What was the total home improvement revenue for your company in 2023?

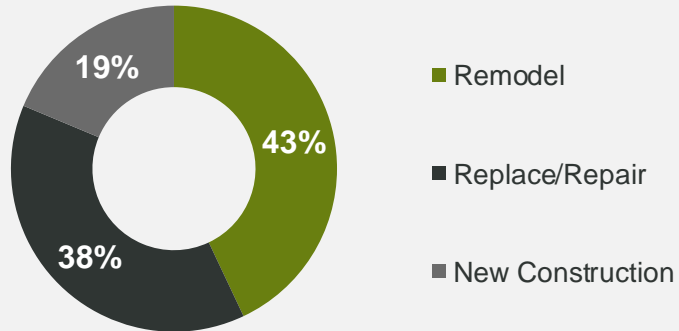
QP18. What do you project your company's revenue will be in 2024 compared to 2023?



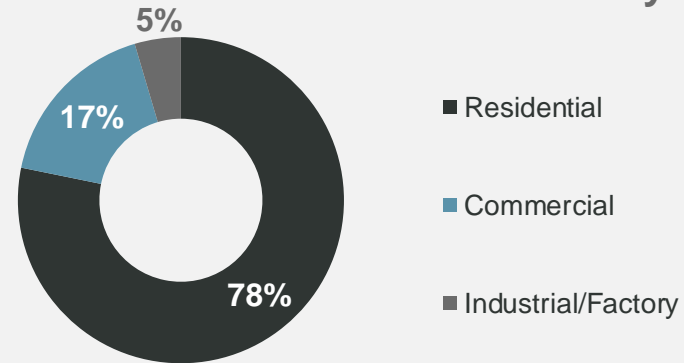


# Respondent Profile: Contractors

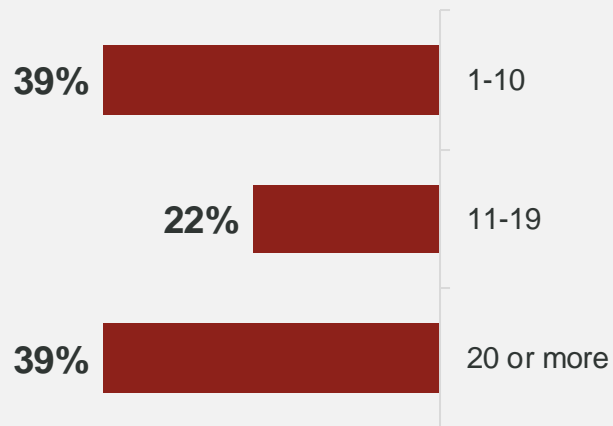
### Remodel vs. Replace/Repair vs. New Construction



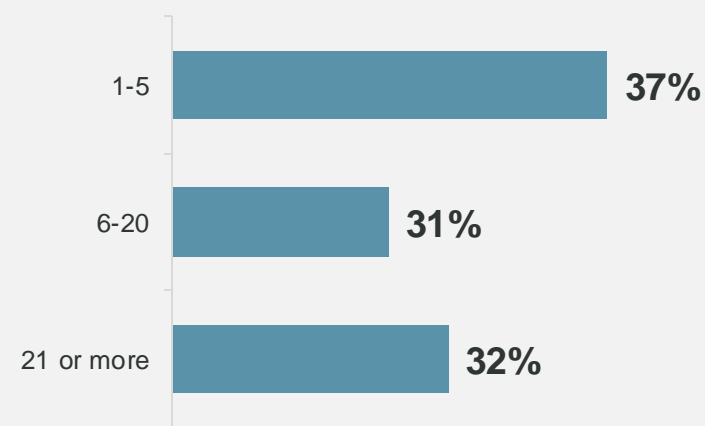
### Residential vs. Commercial vs. Industrial/Factory



### Tenure in Years



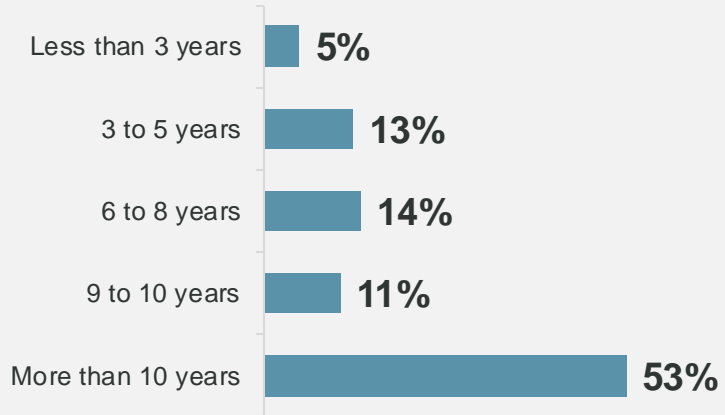
### # of Full-Time Employees



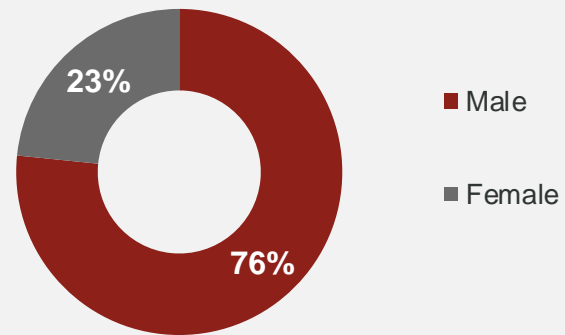


# Respondent Profile: Contractors

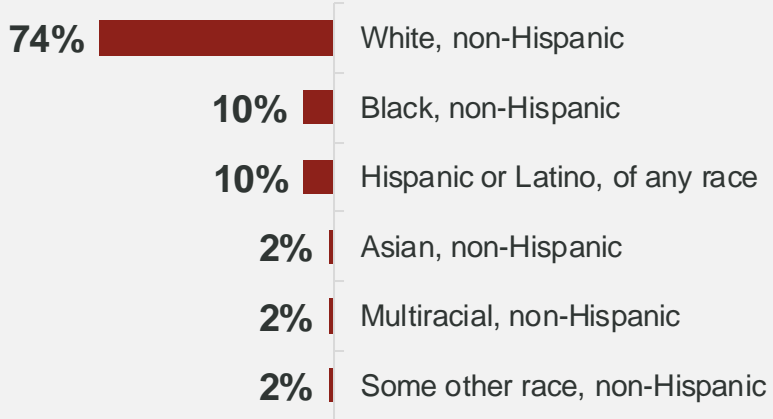
### # of Years in Business



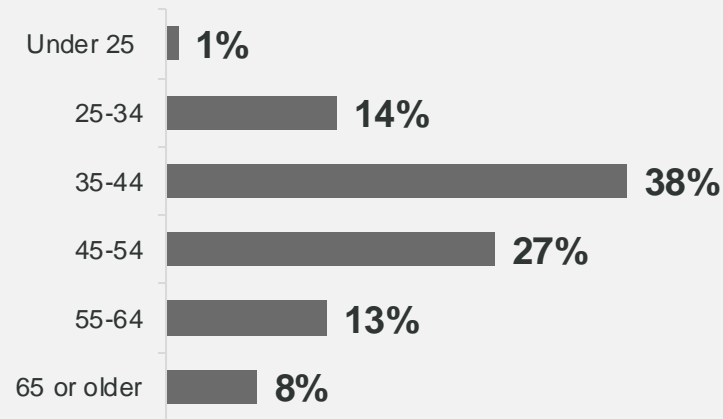
### Gender



### Ethnicity



### Age





**Healthy and Safe Home**



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# Healthy and Safe Home

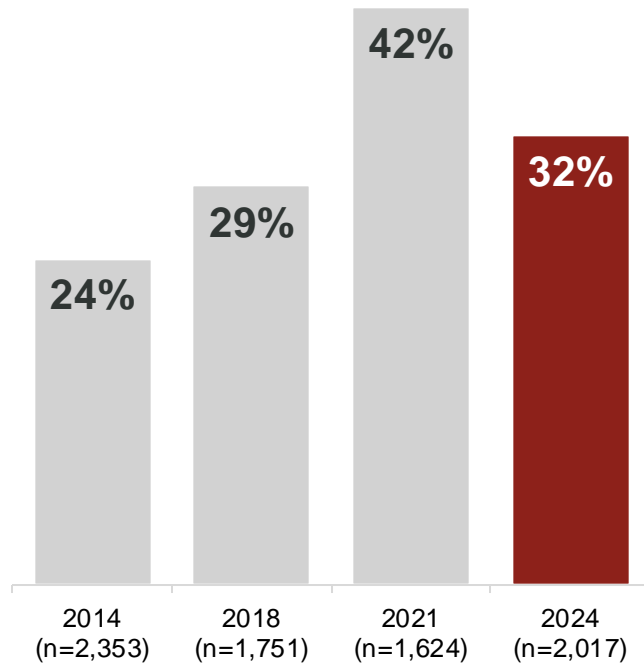
Homeowners





# Homeowner concerns about home health and safety have nearly returned to pre-pandemic levels. Those under 55 and with children at home 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\*?

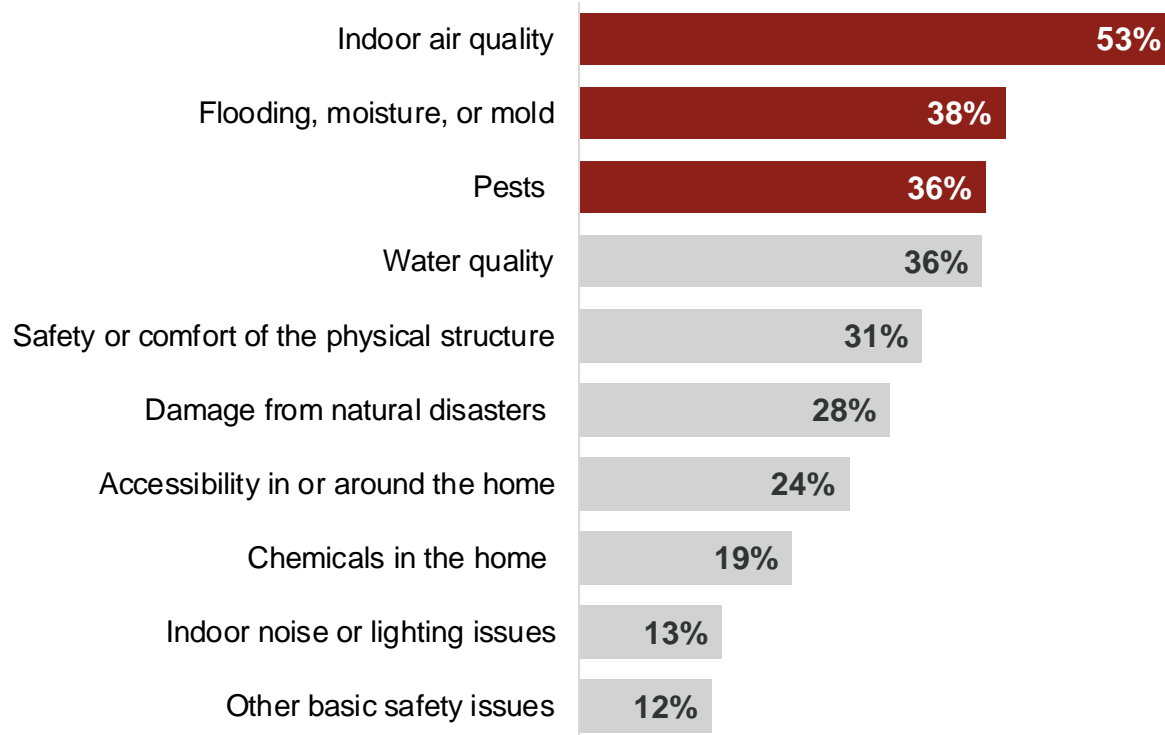
Click [here](#) to see the data in graph form



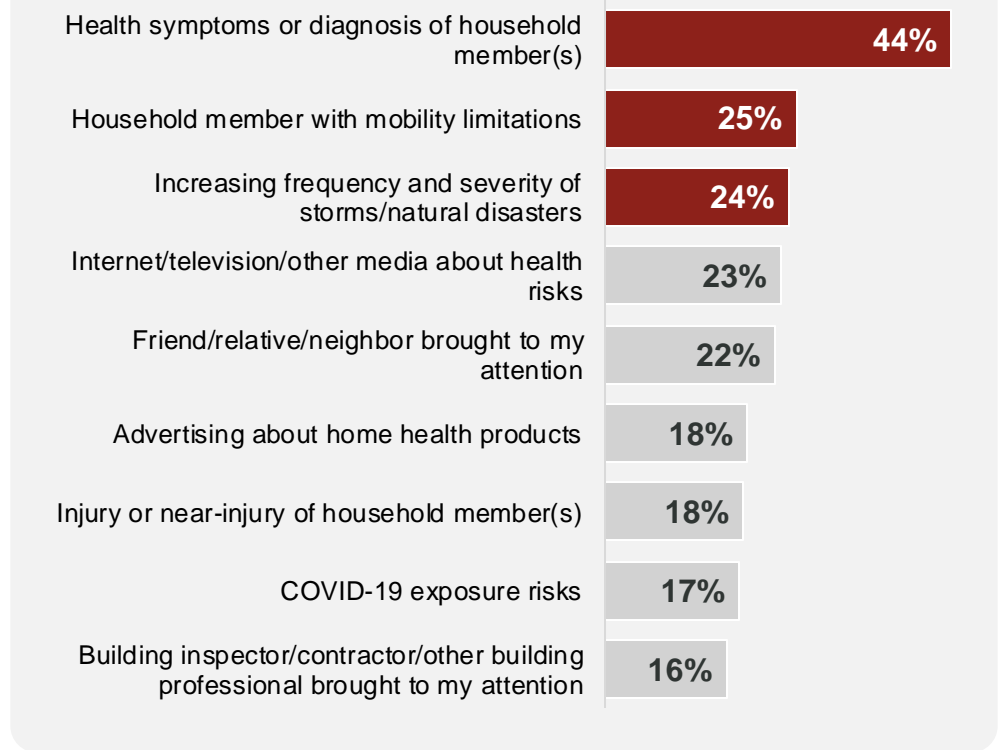
# Indoor air quality remains the top concern for homeowners, primarily due to household health. Unlike in 2021, COVID-19 exposure is no longer a leading factor.

## 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



QH4. [IF HAS HEALTH OR SAFETY CONCERNS] Which category(ies) best describes your concern about the impact of your home on your household's health and safety\*? (Select all that apply)

QH4b. [IF HAS HEALTH OR SAFETY CONCERNS] Which of the following reasons have led to the concerns you selected previously? (Select all that apply)

\*"Wellbeing" removed from categories in 2024.

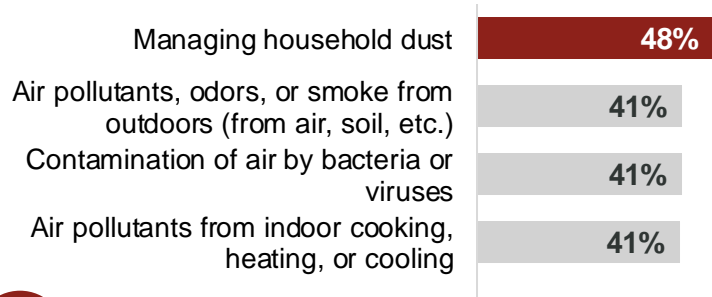




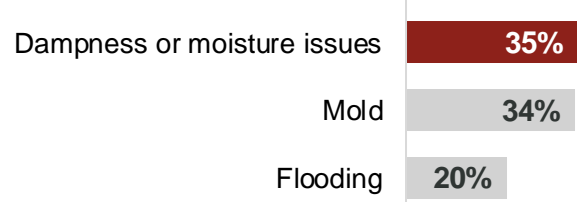
# Managing household dust remains the top indoor air quality concern, as in 2021, while concern for other issues has declined.

% 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)

## 53% Indoor Air Quality



## 38% Flooding, Moisture, or Mold



## 36% Water Quality



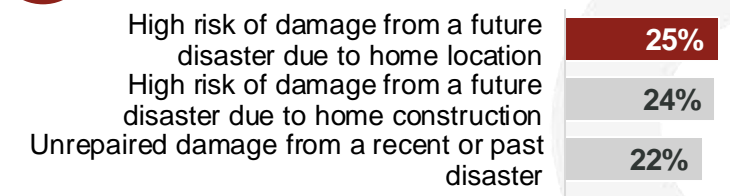
## 36% Pests

Pests	34%
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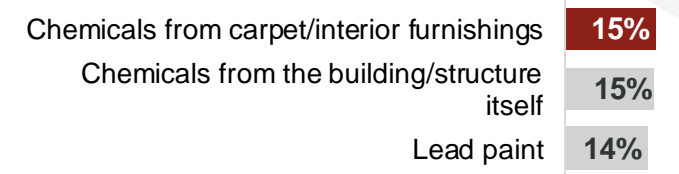
## 31% Accessibility and Safety

Safety/comfort of the physical structure	24%
Accessibility in/around home	12%
Other basic safety issues	
Steps or other barriers that could make it difficult for a person with mobility limitations to enter or exit the home	37%
Safety issues or lack of accessibility features in the bathroom	35%
Interior steps that could pose challenges for a person with mobility limitations	34%
Inadequate or broken plumbing	33%
Safety issues or lack of accessibility elsewhere in the home	32%
Safety issues or lack of accessibility features in the kitchen	31%
Safety/accessibility outside home	31%

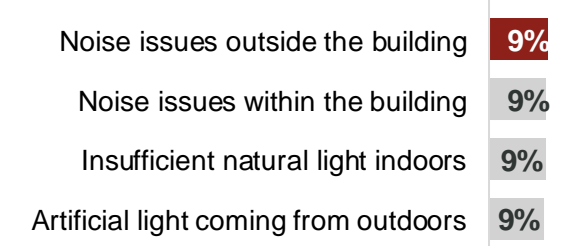
## 28% Natural Disaster Damage



## 19% Chemicals in Home



## 13% Indoor Noise or Lighting



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?





# Since 2021, installations of air exhaust fans, backup generators, and air monitoring systems increased, while lead paint removal has declined.

## Top Healthy Home Activities Completed In The Past Year

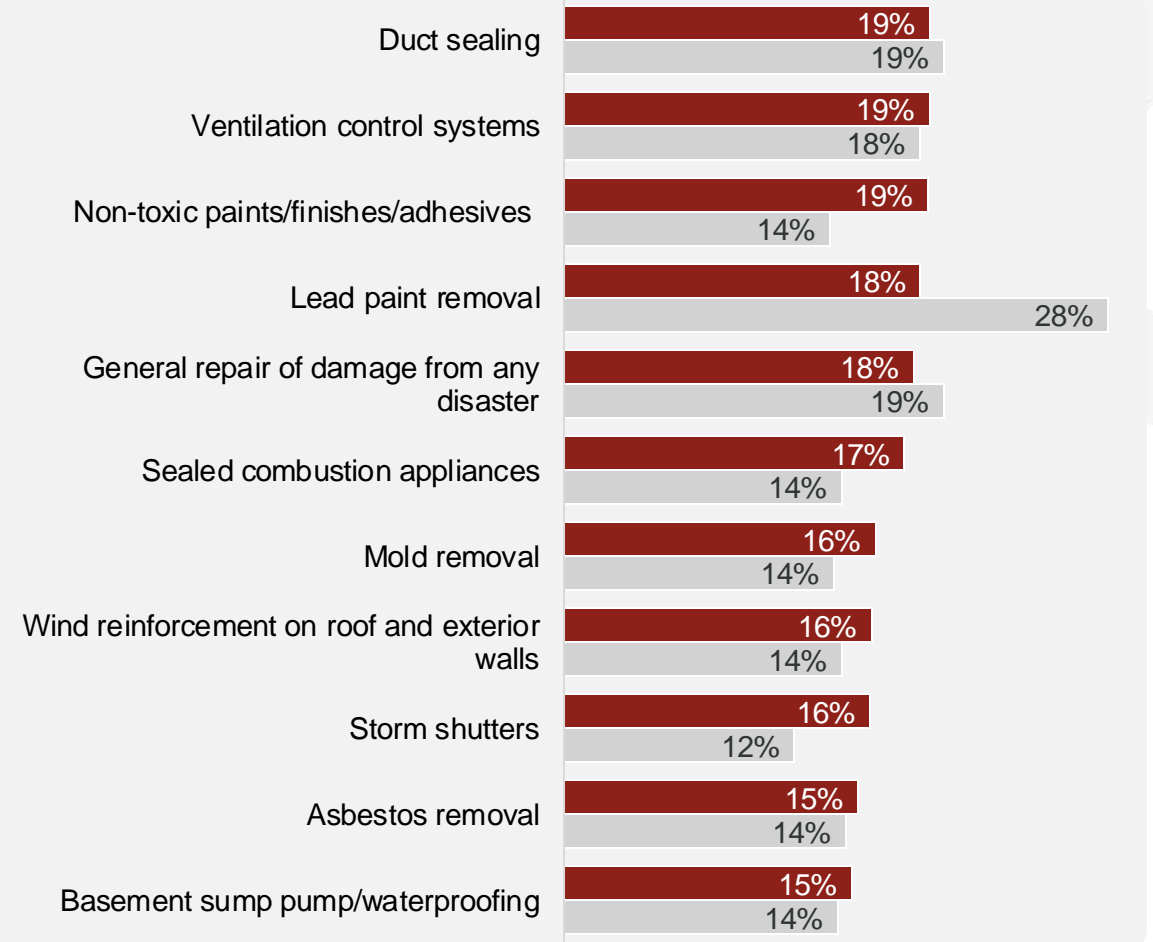
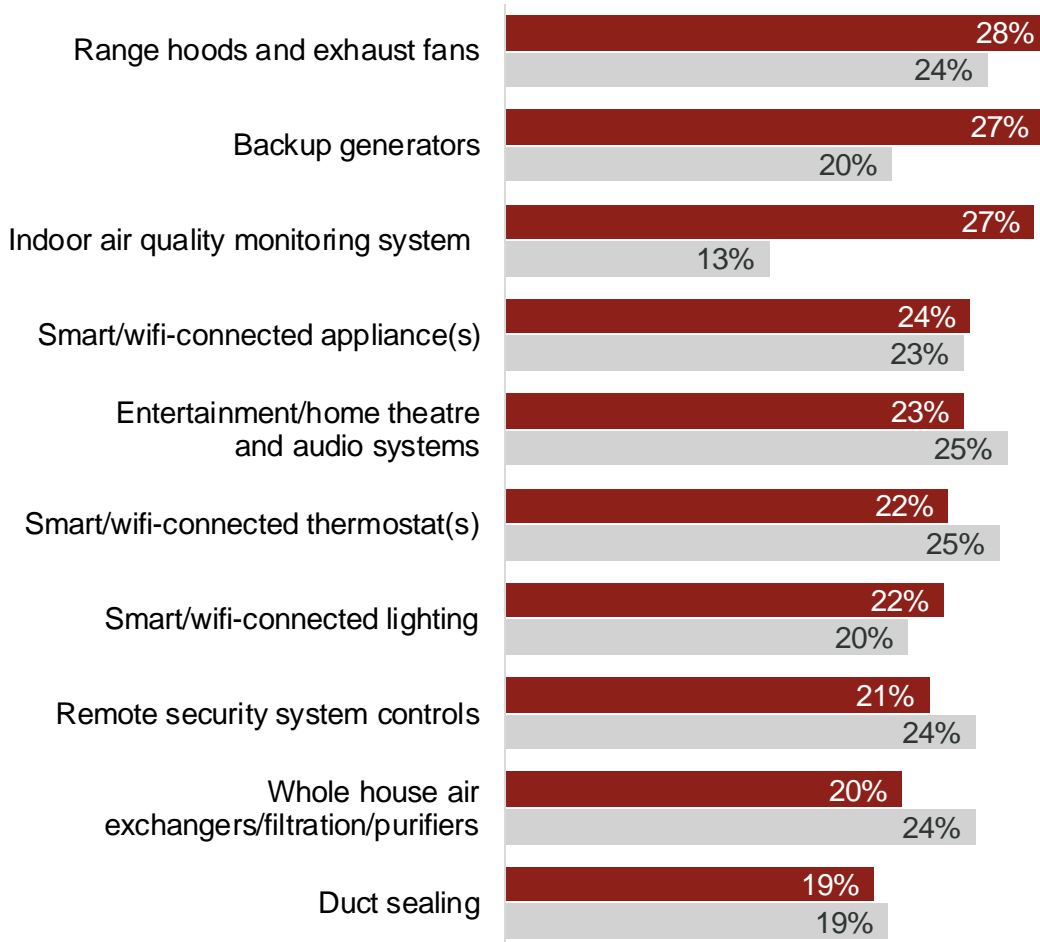
Among Homeowners who have home health or safety concerns

**2024**

n=651

**2021**

n=500

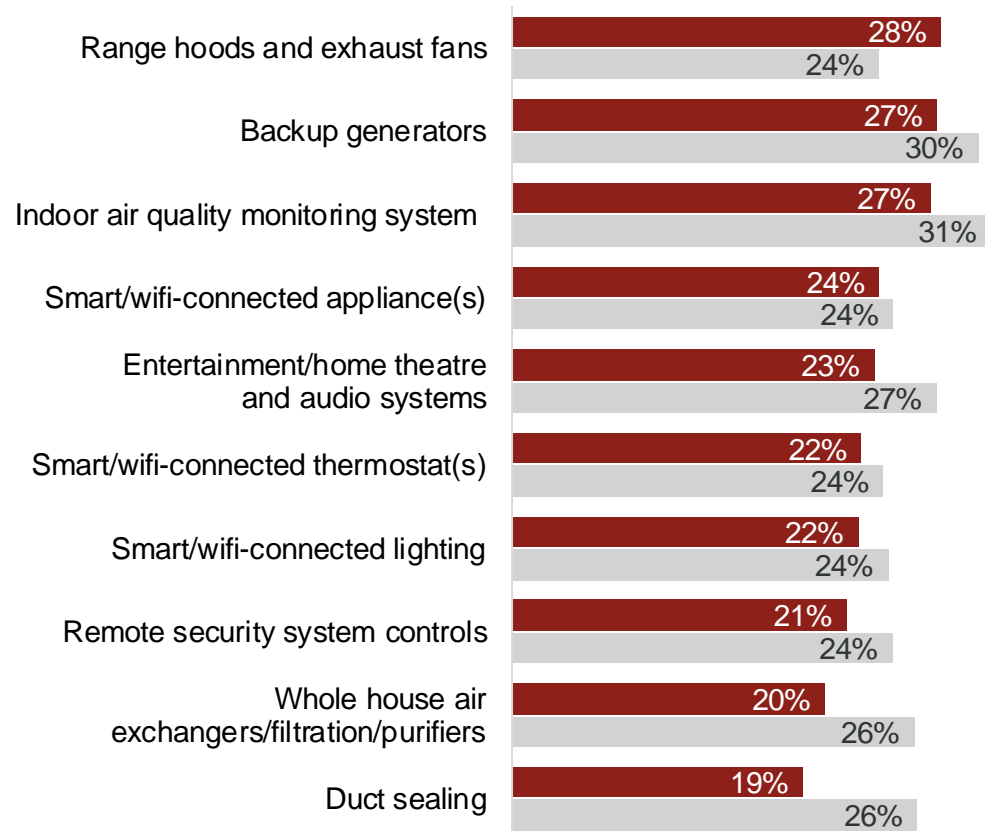




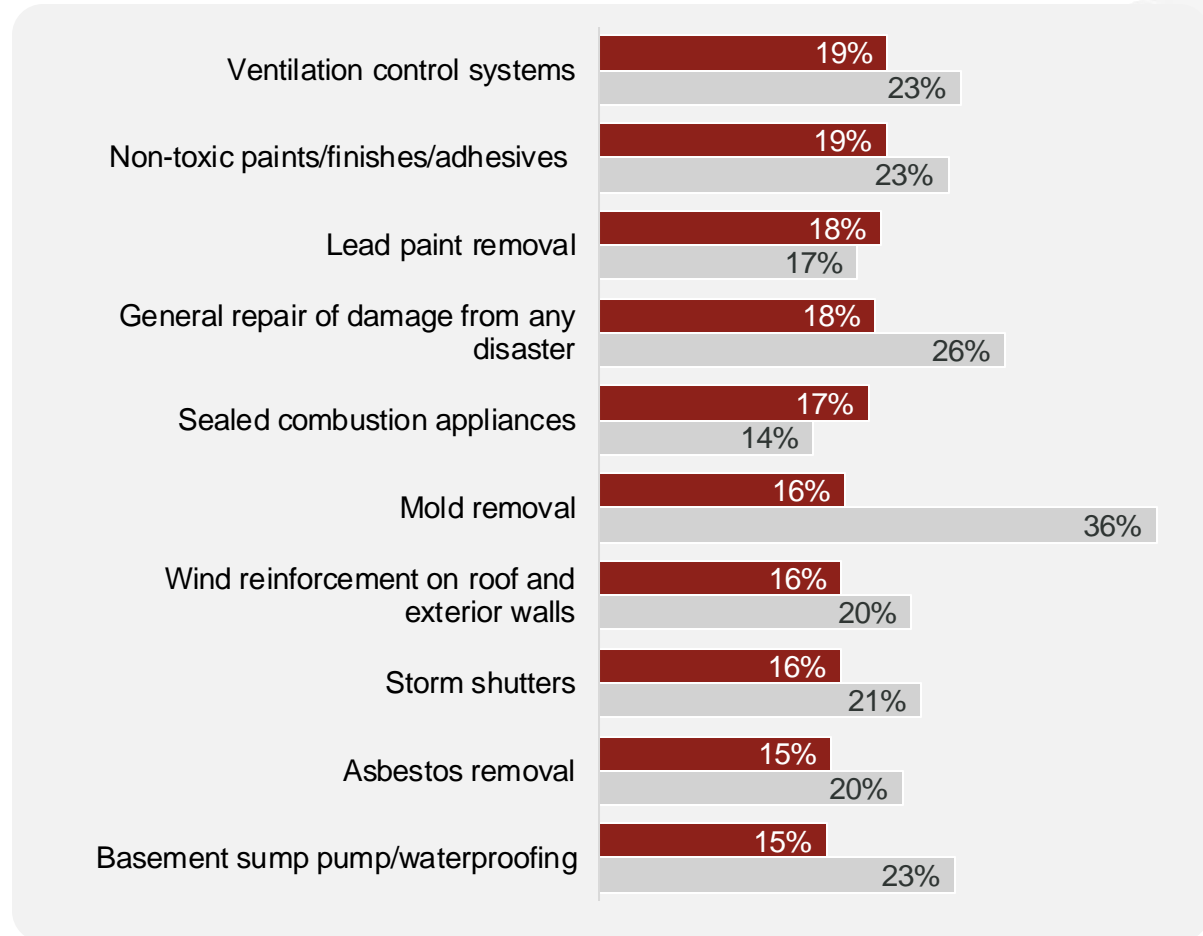
# The most common healthy home upgrades last year were installing range hoods, generators, and air monitoring systems. Notably, more homeowners plan to take these steps than have already done so.

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

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



**Completed** Planning

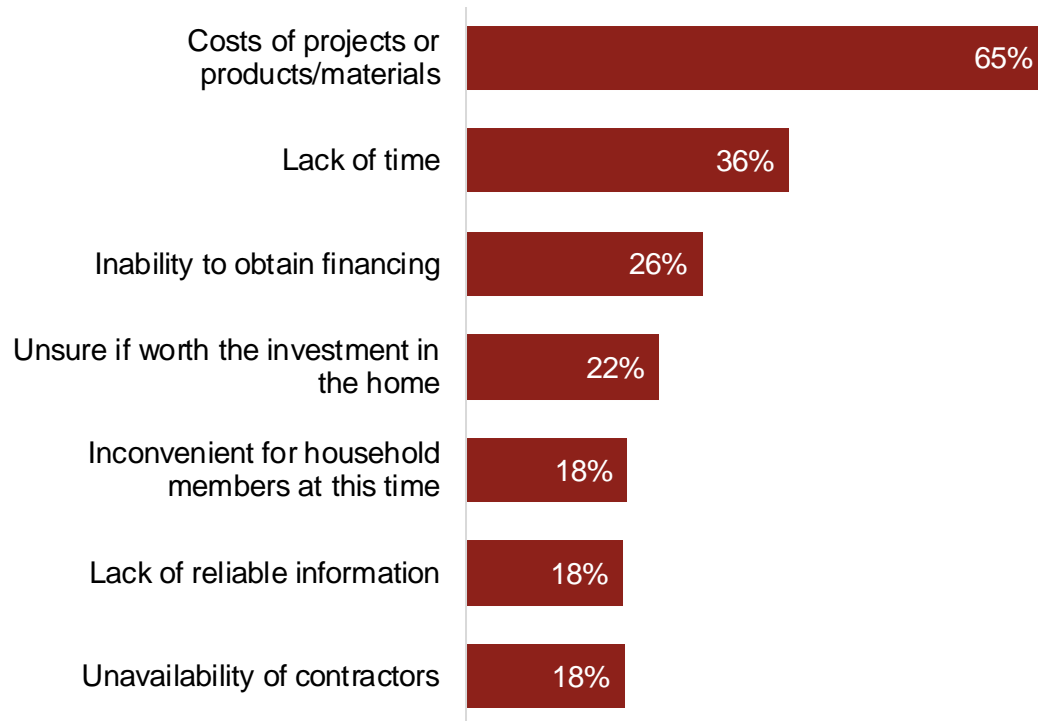




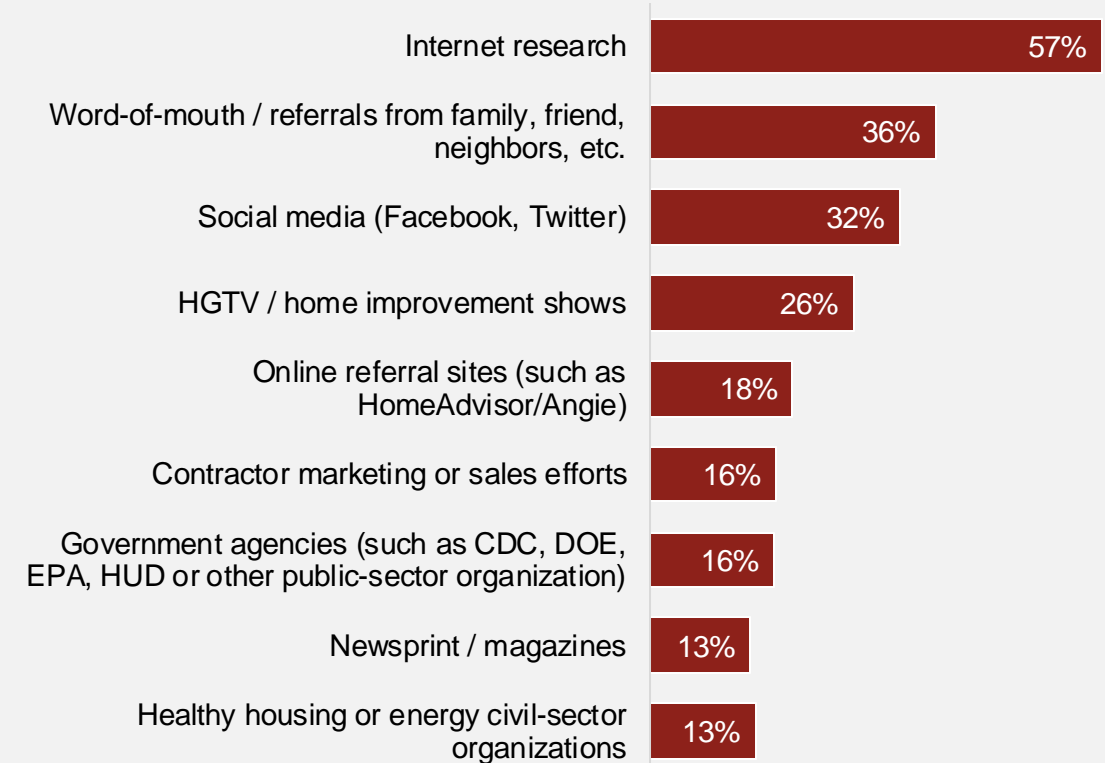
# The primary obstacle preventing homeowners from completing planned healthy home projects is cost. Homeowners are primarily learning about healthy homes through internet searches.

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"



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# Healthy and Safe Home

## Contractors

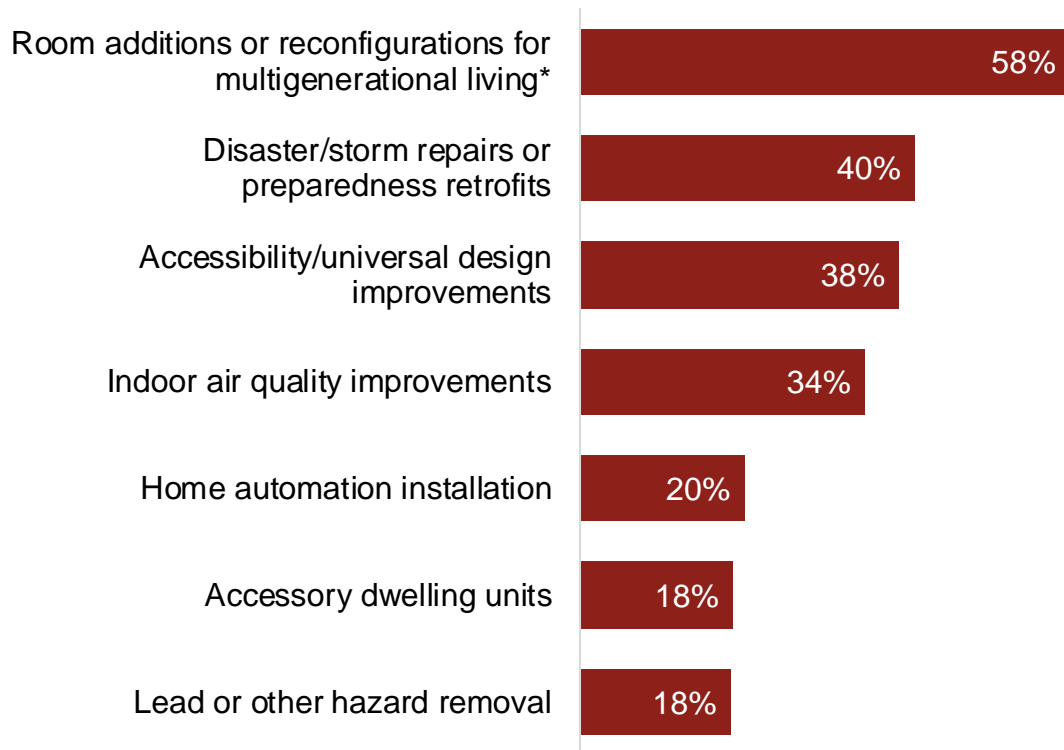




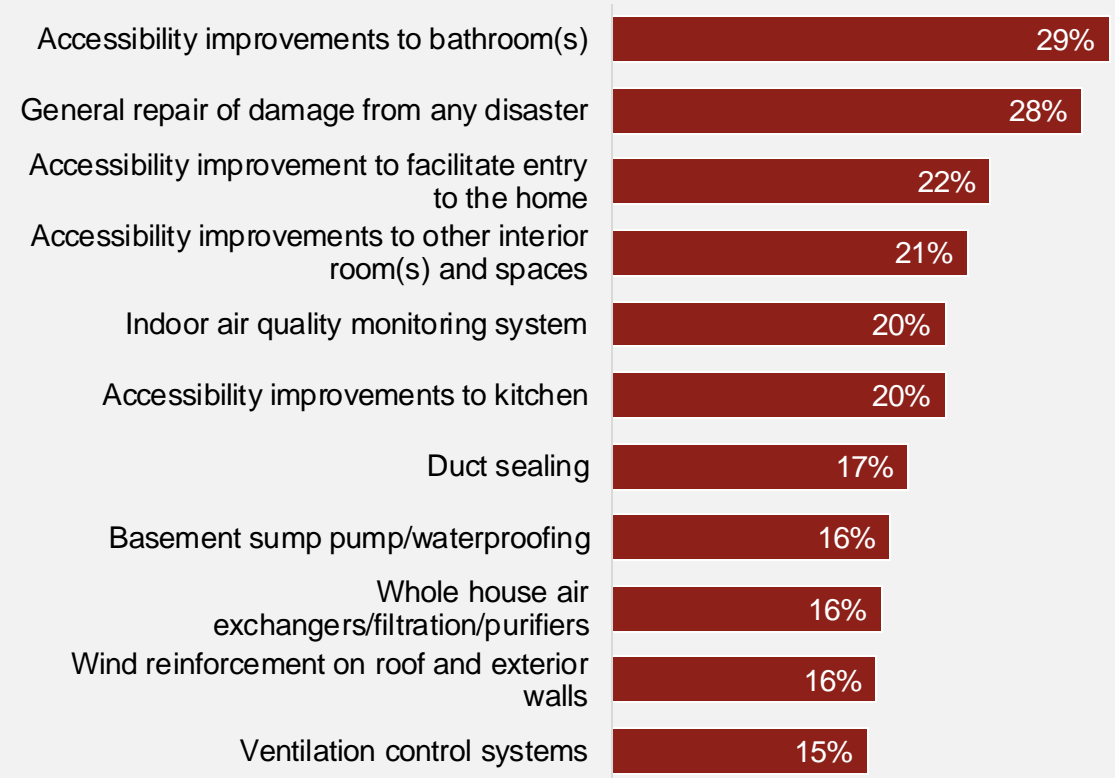


# Room additions and reconfigurations led installations over the past three years. In the last year, bathroom accessibility improvements and disaster damage repairs were the top healthy home remodels.

## 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?

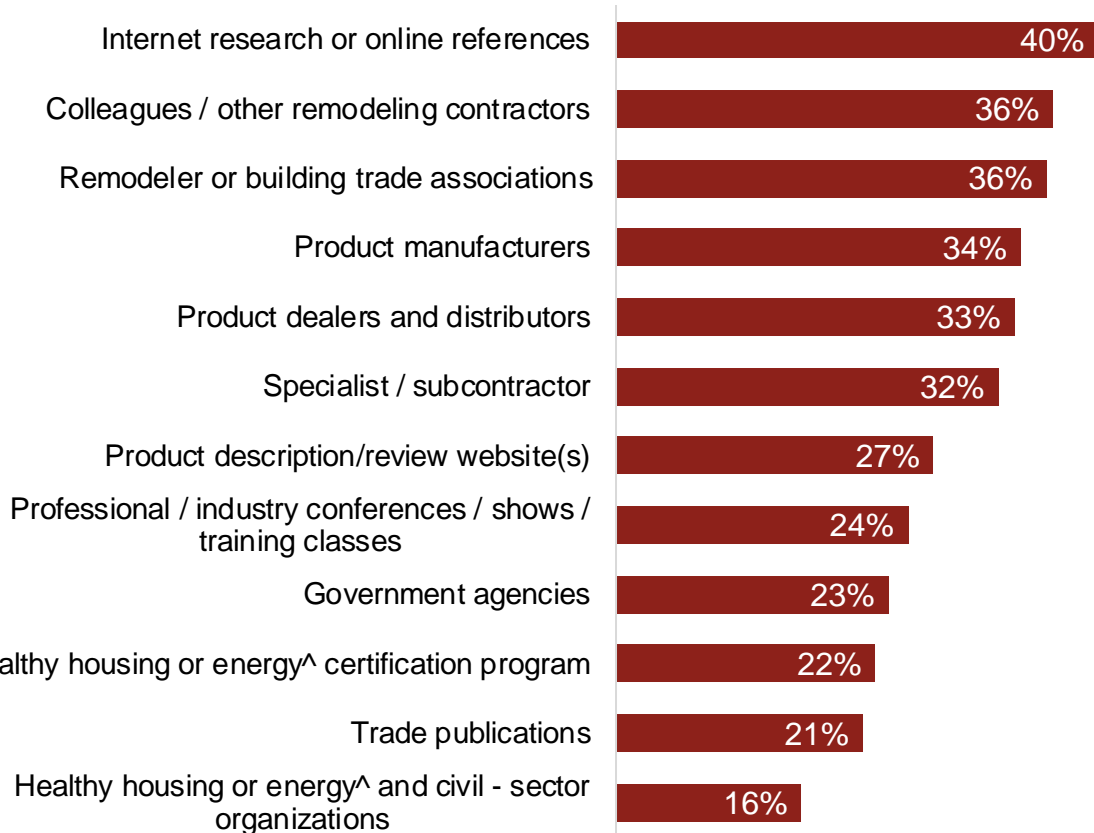
\* "for multigenerational living" added in 2024





# Many contractors mentioned using the internet for information on healthy or green-home work. A third were unsure about certifications that were obtained.

## Most Helpful Healthy or Green Resources

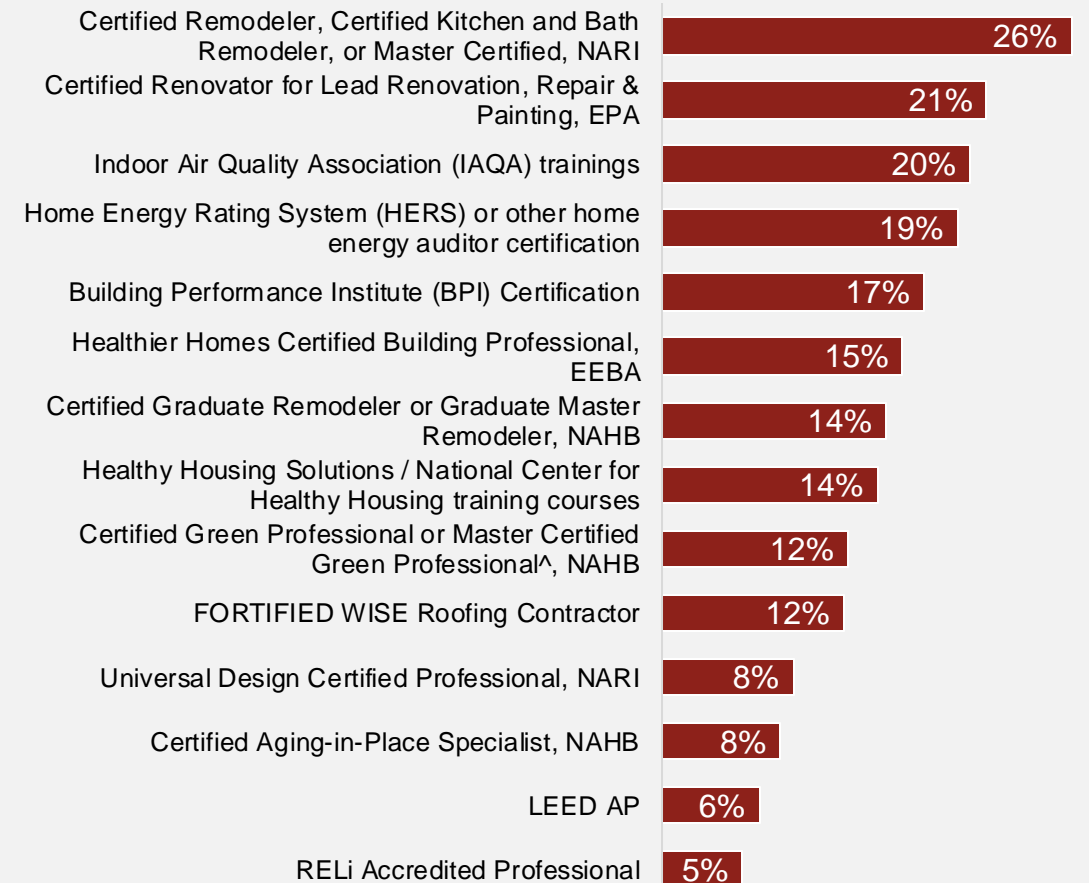


(n=373)

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

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# Environmental and Energy Performance

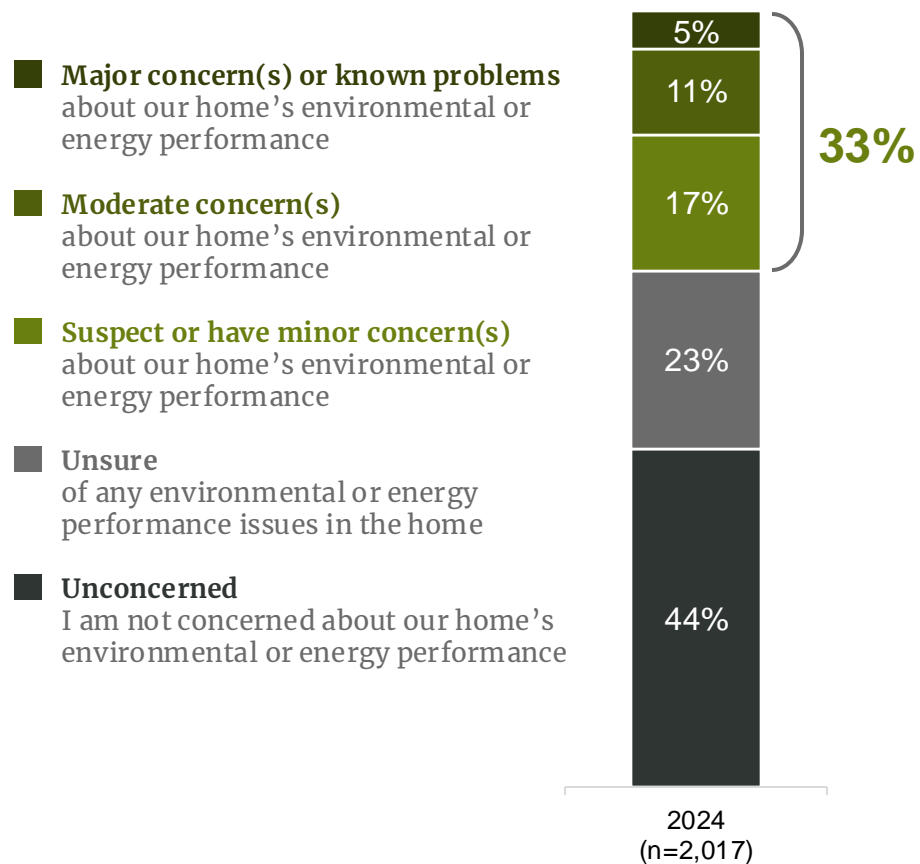
Homeowners





# Homeowners under 55, those with children, and college graduates are more likely to worry about energy or environmental performance, with concern nearly equal to health and safety.

## 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?

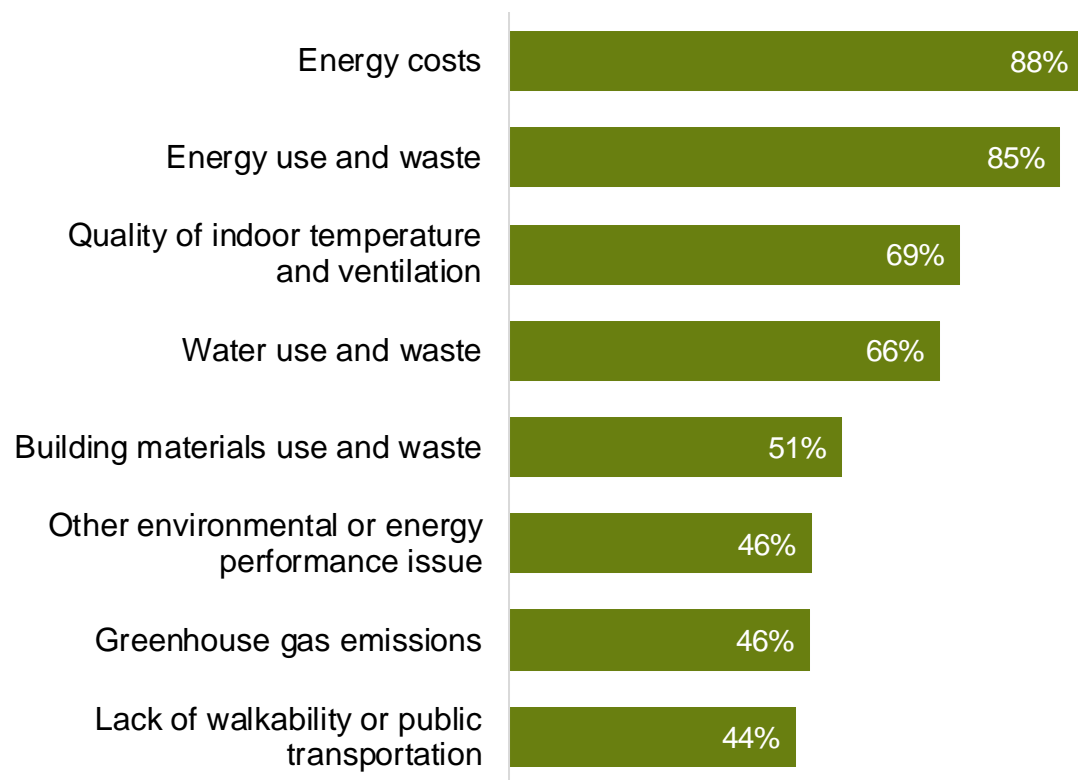
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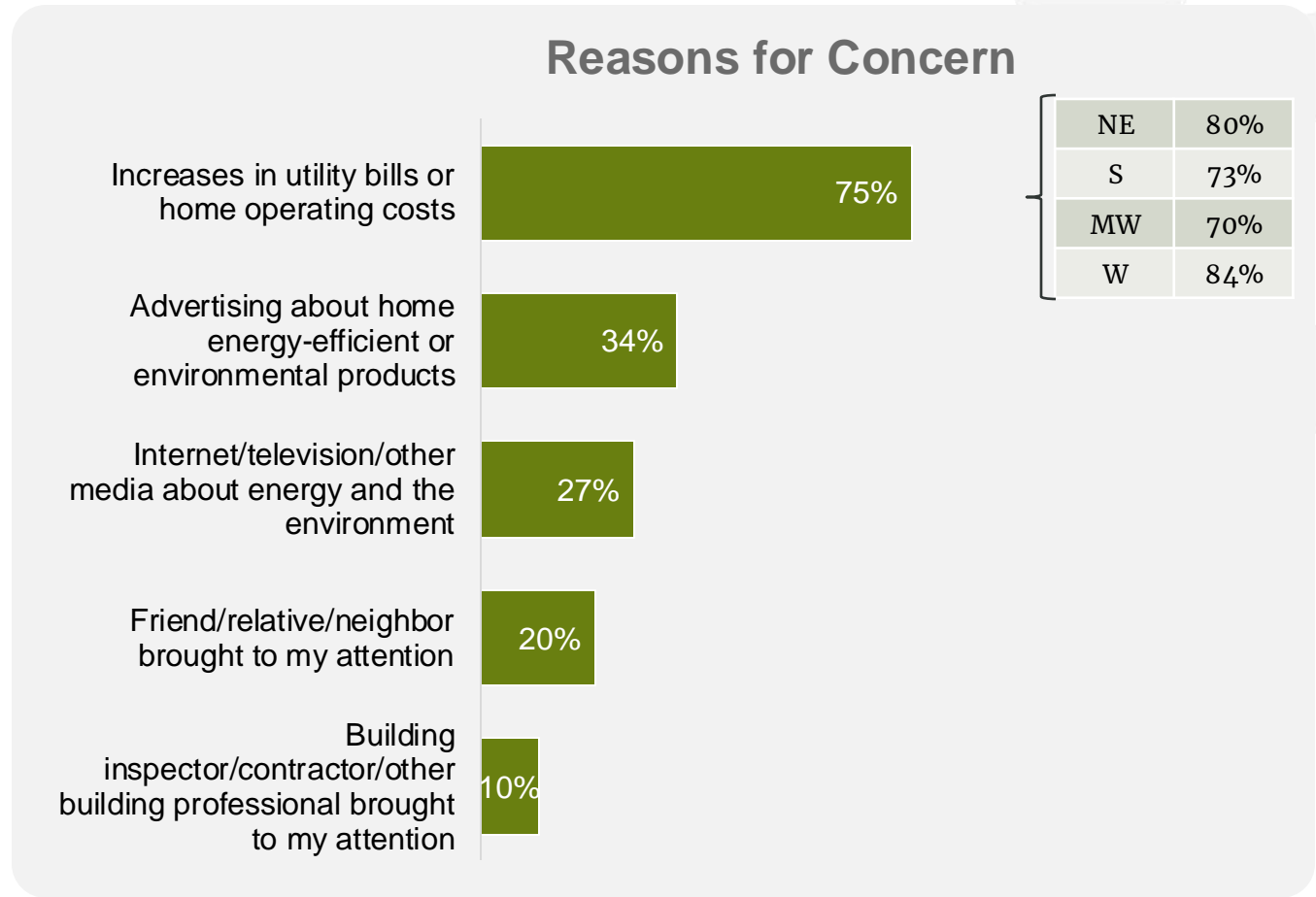
# Homeowners are primarily concerned about energy costs and usage. The most significant reason for concern is the increasing cost of energy.

% 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



NE	80%
S	73%
MW	70%
W	84%

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?





# Most green activities are planned to be completed by fewer Homeowners now than in 2021.

## Top Environmental or Energy Activities Planning To Complete

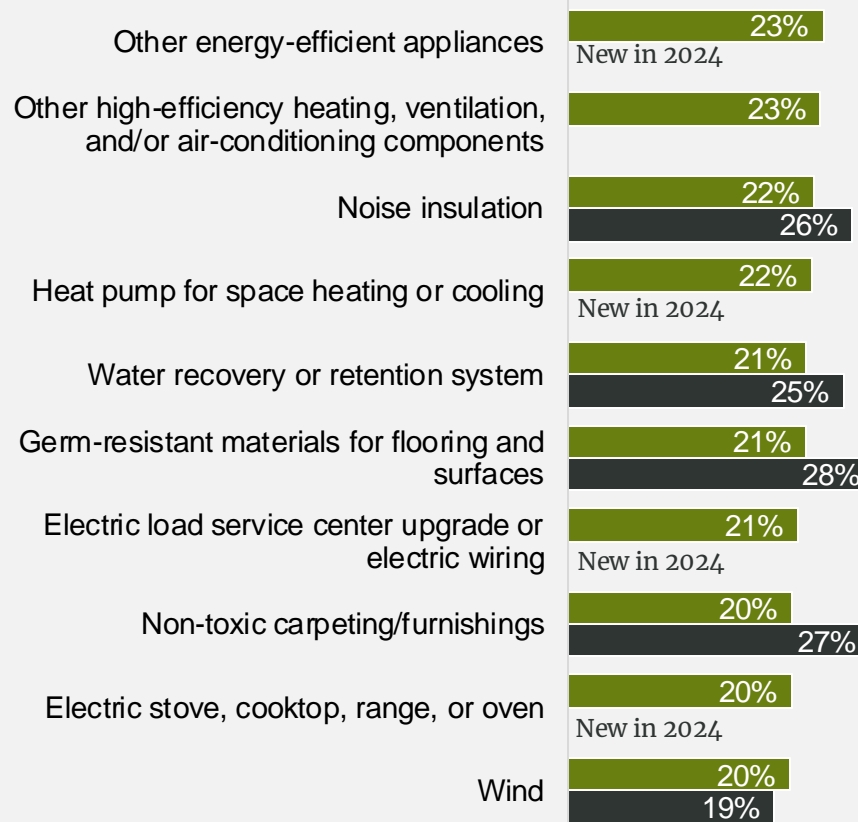
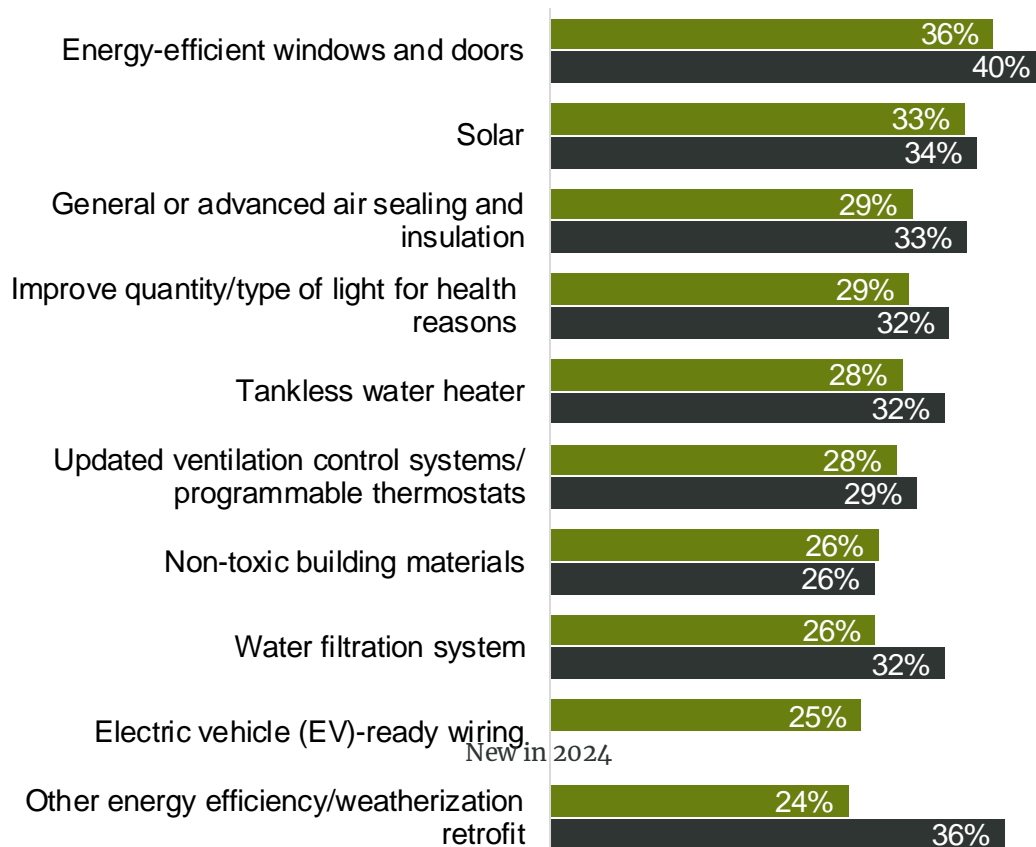
Among Homeowners who have environmental or energy concerns

**2024**

n=673

**2021**

n=500

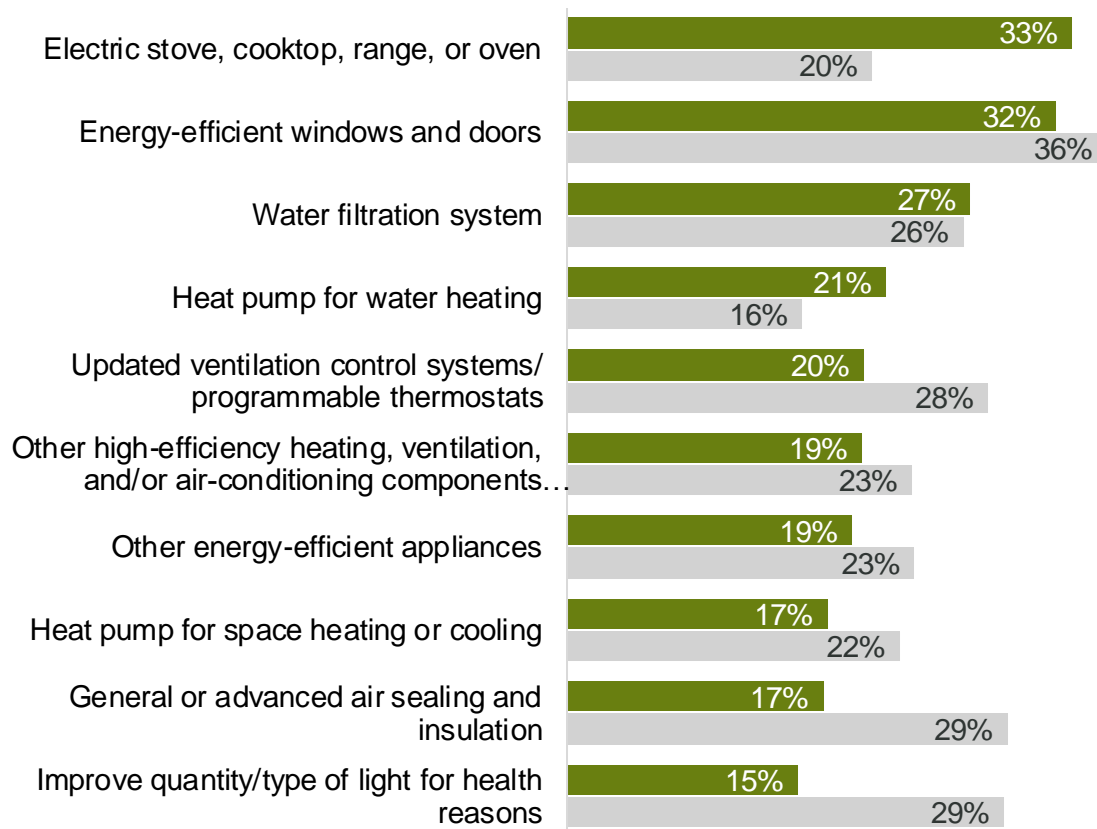




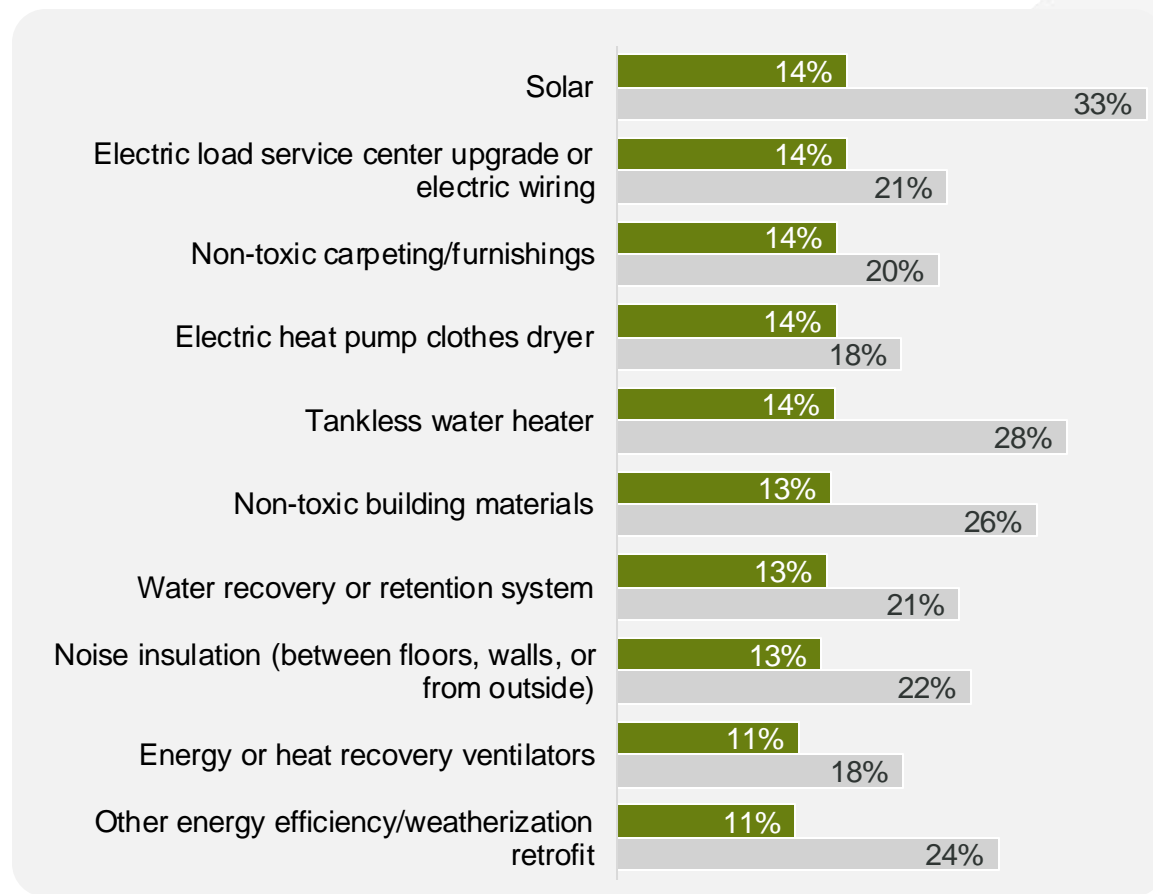
# Installing electric kitchen appliances and energy-efficient windows and doors were the top green home upgrades last year. More homeowners plan to take these steps than have done so.

## 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**



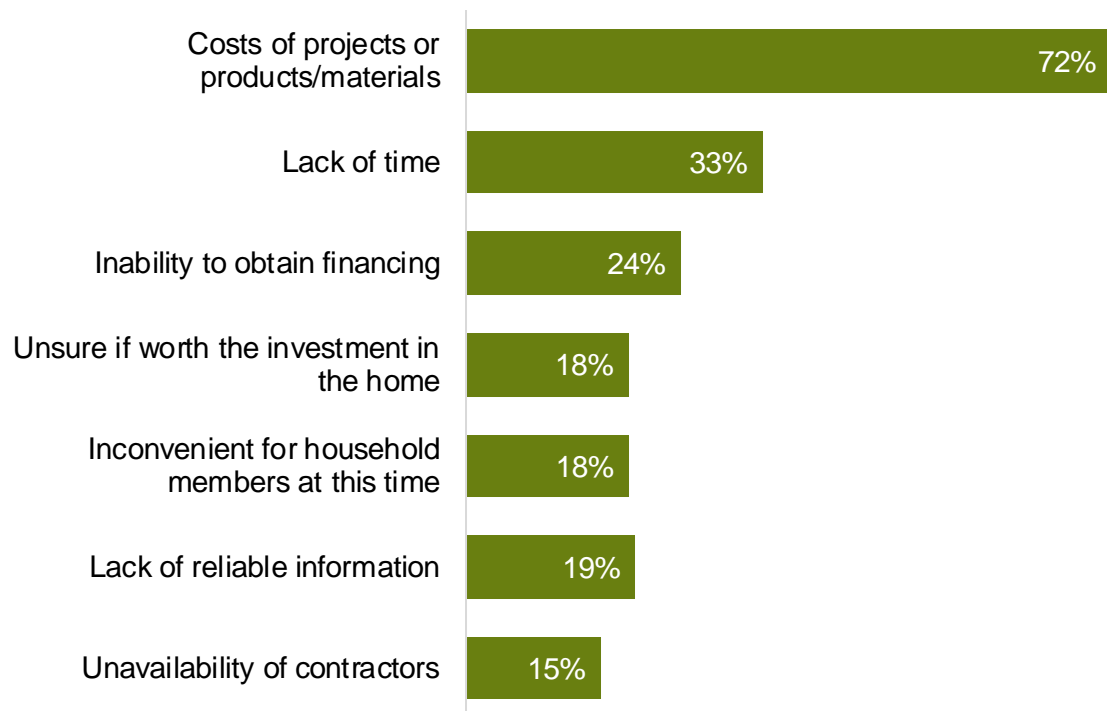




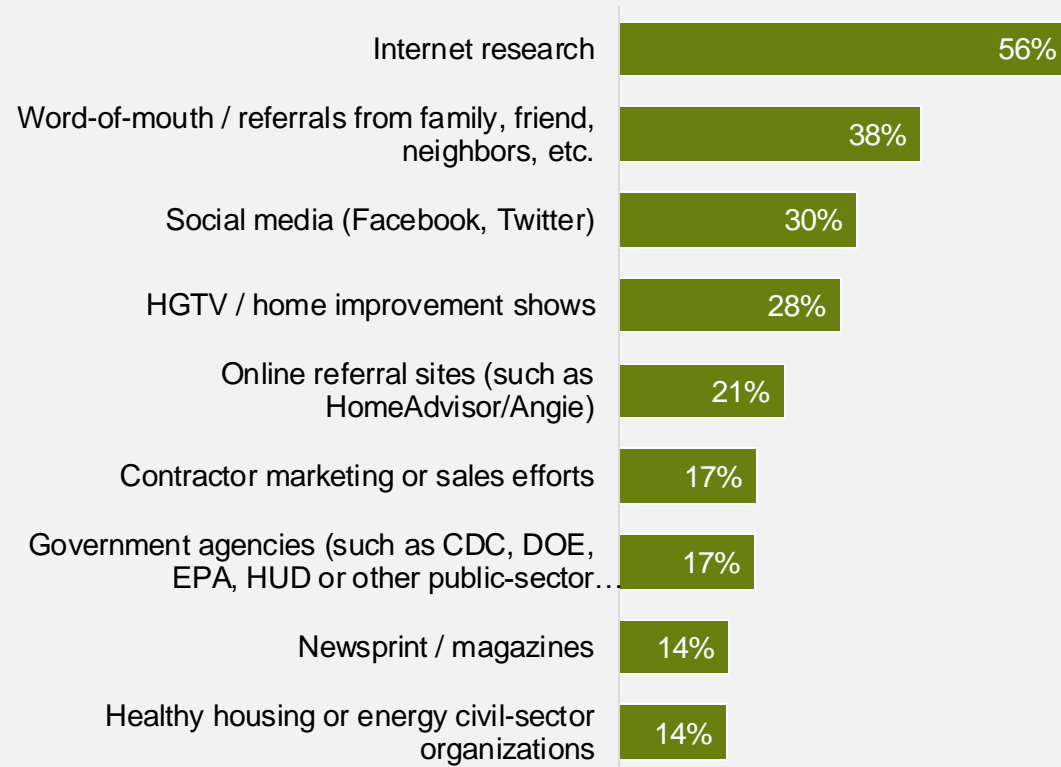
# Cost is the overwhelming top obstacle preventing Homeowners from completing a planned green home project. Homeowners are primarily learning about green homes through internet searches.

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

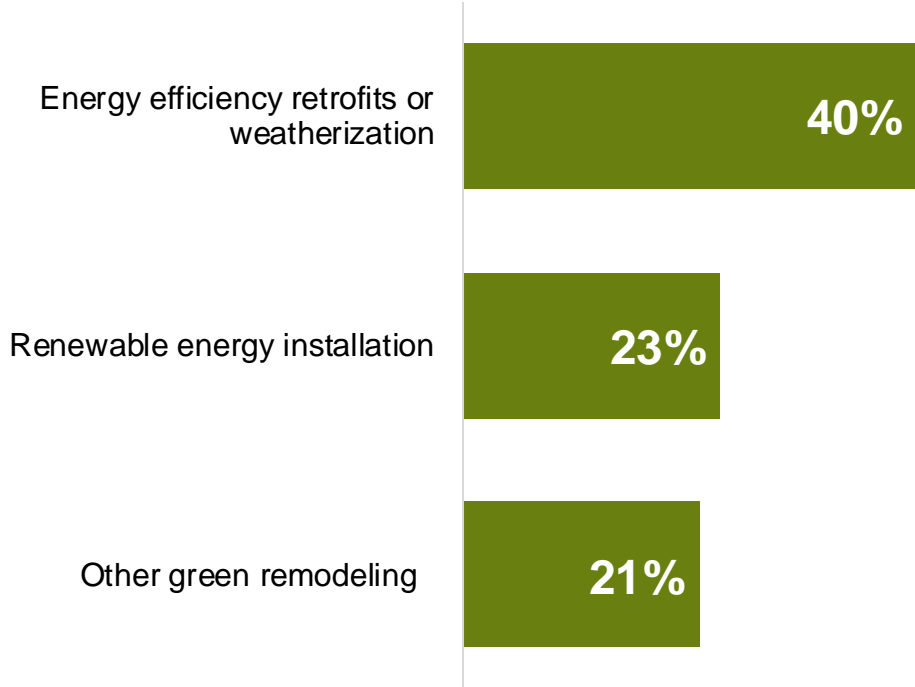
Contractors





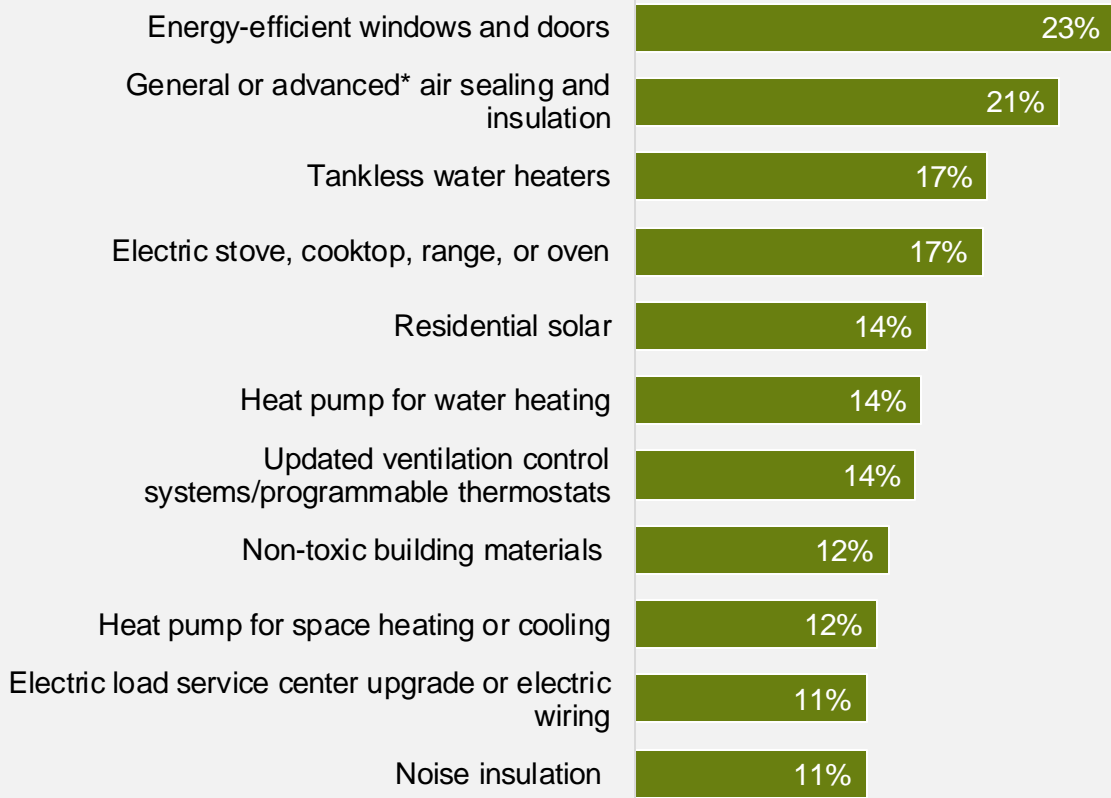
# Contractors installed energy efficiency retrofits nearly twice as often as renewable energy projects over three years. Energy-efficient windows and doors were the most common upgrade last year.

## 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



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?

# 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

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# 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.

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