

Americans Want Smart, Healthy, Energy-Efficient Homes. Here's How to Move Them from Desire to Action



HIGH PERFORMANCE
HOME SUMMIT 2019

EEBATM

OCTOBER 1-3 \ DENVER, CO

Need help effectively marketing your organization?

Contact Shelton Group, the nation's leading marketing communications agency exclusively focused in the energy and environmental arena:

<http://www.sheltongrp.com/>; info@sheltongrp.com.

Thank you!

We create a market advantage for organizations that create a sustainable, energy-responsible future



The company we keep



We start here...

energypulse™

ecopulse™

b2bpulse™



Shelton^{Grp}

Shelton^{Grp}

Brands & Stands

Social purpose is the new black

...and we end with marketing strategies and plans that build brands, shift perceptions and drive sales...

The laptop screen displays a presentation slide with a dark blue header and a light blue background. The slide is titled '3-Point Framework' and includes the Shelton^{Grp} logo in the top right corner. Below the title is the subtitle 'Path to Integration, Engagement and Participation'. The main content is organized into three numbered steps, each with a title and a list of bullet points. The background of the slide features a photograph of a wind farm in a field.

3-Point Framework

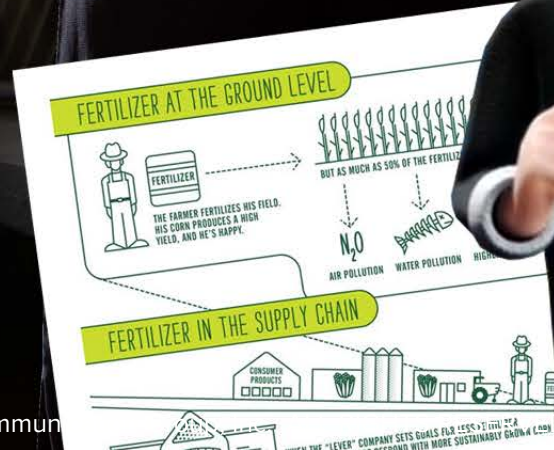
Shelton^{Grp}

Path to Integration, Engagement and Participation

- 1.**
Drive awareness of/belief in clean energy programs
 - One-two punch – wake them up/connect them to programs/solutions
 - Stop marketing programs; start marketing to the customer
 - Create bundles
 - Cross market
- 2.**
Connect to the why and overcome suspicion
 - Tell the business model story
 - Tell the sustainability RE leadership story
 - Show your motives
- 3.**
Catalyze a curious community
 - Do it with me for the love of MI
 - Showcase initiatives that inspire a clean energy future/culture

In it together to do good

..and communications that build brands, shift perceptions and drive sales.



Ameren MISSOURI
WHAT'S EVERYONE SMILING ABOUT?
Cash rebates for saving energy!

IT'S YOUR TO SMILE
Get rebates for all your home's efficiency needs

A trip down memory lane

**America is in the middle of a
social/cultural shift regarding the
environment**



82%

of Millennials are anxious about how climate change will affect their children's quality of life

n=2,025

Gain a sustainable advantage



UNITE BEHIND THE SCIENCE

UNITE BEHIND THE SCIENCE

RENEWABLE ENERGY = GOOD JOBS
CLEAN AIR
CLEAN WATER
HEALTHY PLANET!
1199SEIU

UNITE BEHIND THE SCIENCE

UNITE BEHIND THE SCIENCE

WE NEED EARTH IT DOESN'T NEED US

ENERGY
UNITE BEHIND THE SCIENCE

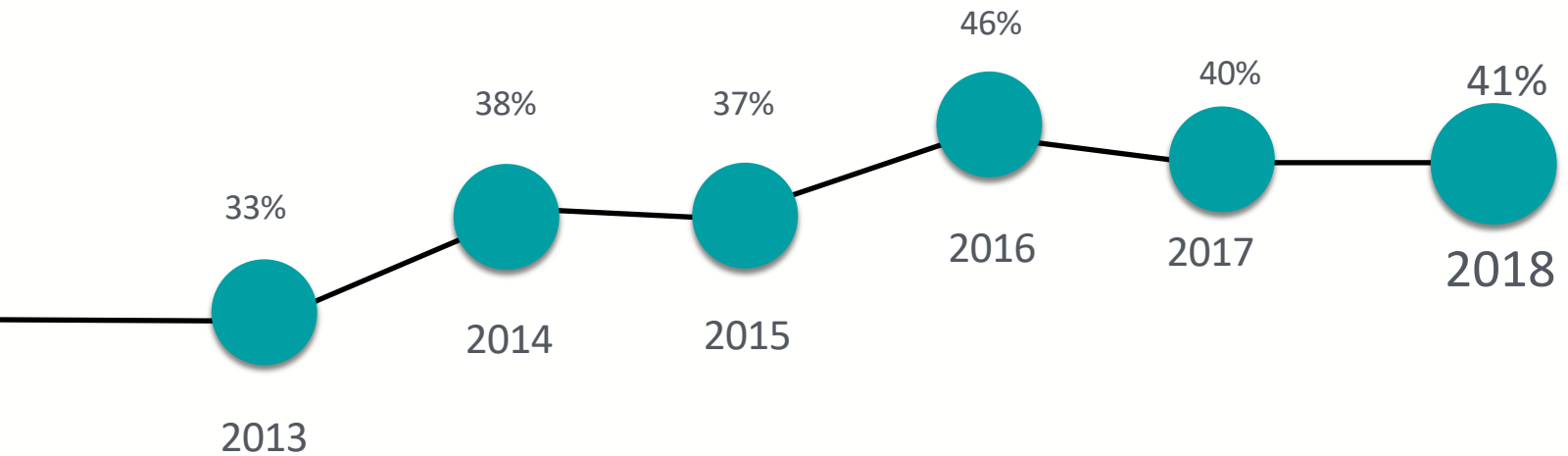
LET'S SOLVE CLIMATE CHAOS WITH CLEAN ENERGY!

MAKE GREAT
STOP DENYING THE EARTH'S

CLIMATE STRIKE

RESEARCH FOR SCIENCE

Would you like to be seen as someone who buys eco-friendly products?



63%

say a company's environmental
reputation impacts their purchase
decisions

86%

of Americans believe that companies should take a stand for social issues

Can you think of a time when you've purchased —
or not purchased — a product based on
the environmental record of the manufacturer?

Name the brand or company.

25%

of Americans can name a specific brand they've purchased – or not purchased – because of the environmental record of the manufacturer... from 2009 - 2014 it was

6%



What major purchase best reflects our values, green or otherwise?

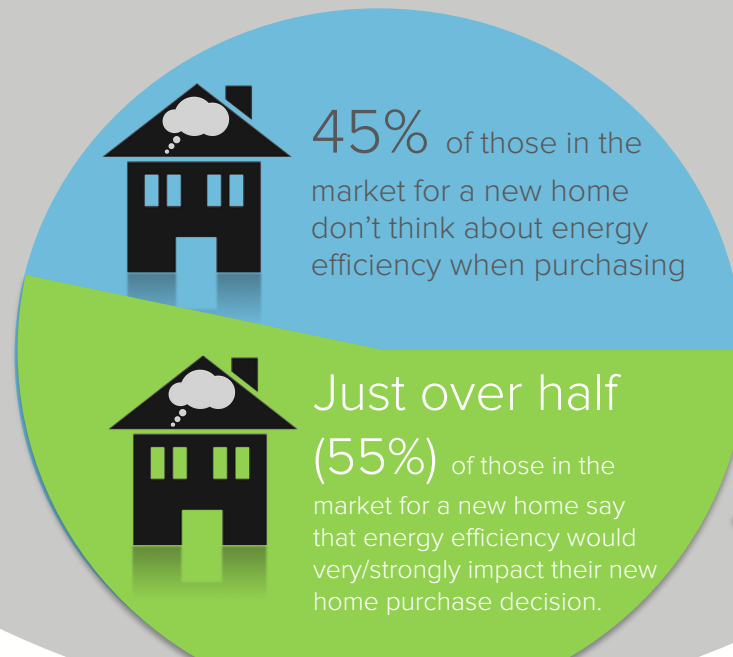
89%

of people who expect to buy a new home in the next two years say **higher energy efficiency would cause them to choose** one new home over another

energypulse™

nationally representative sample of

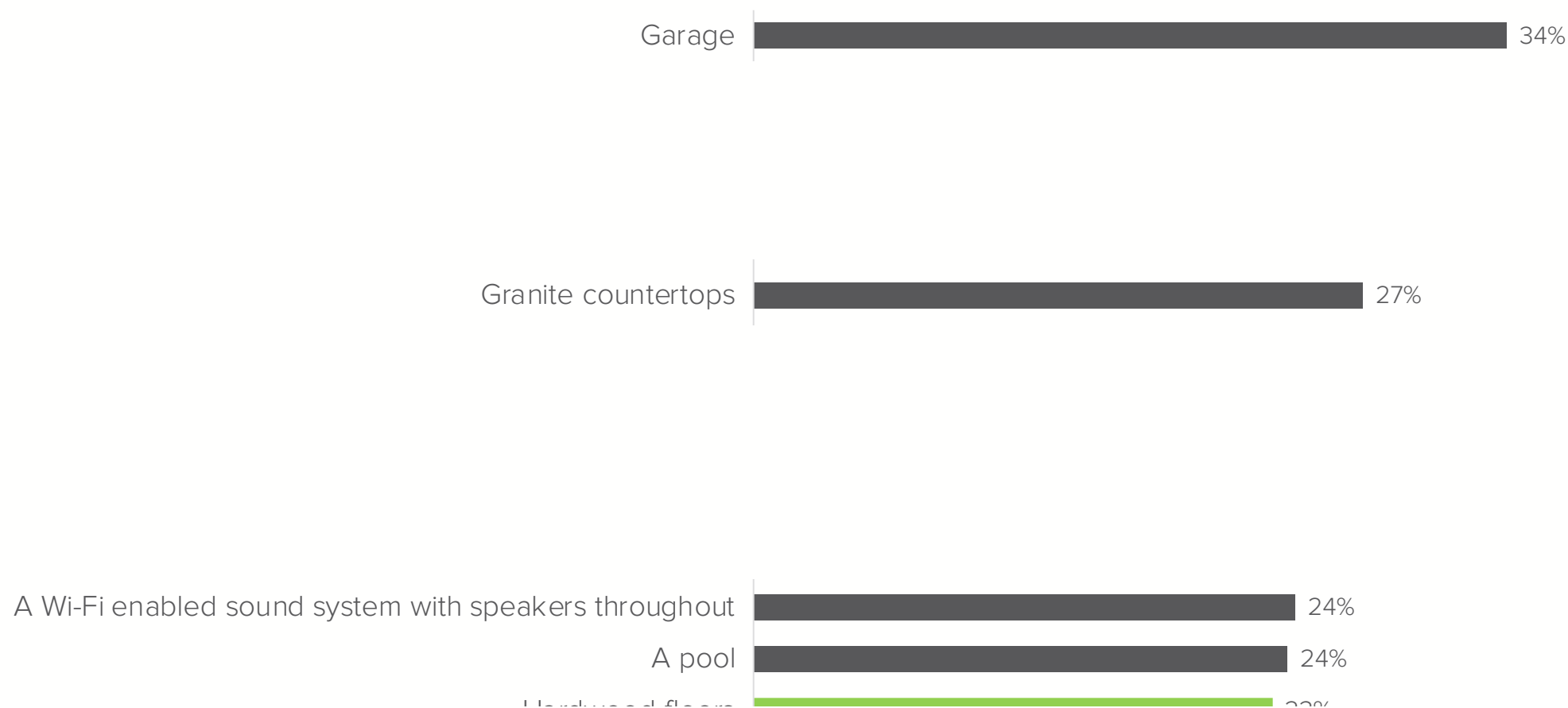
100%
of Americans



20%

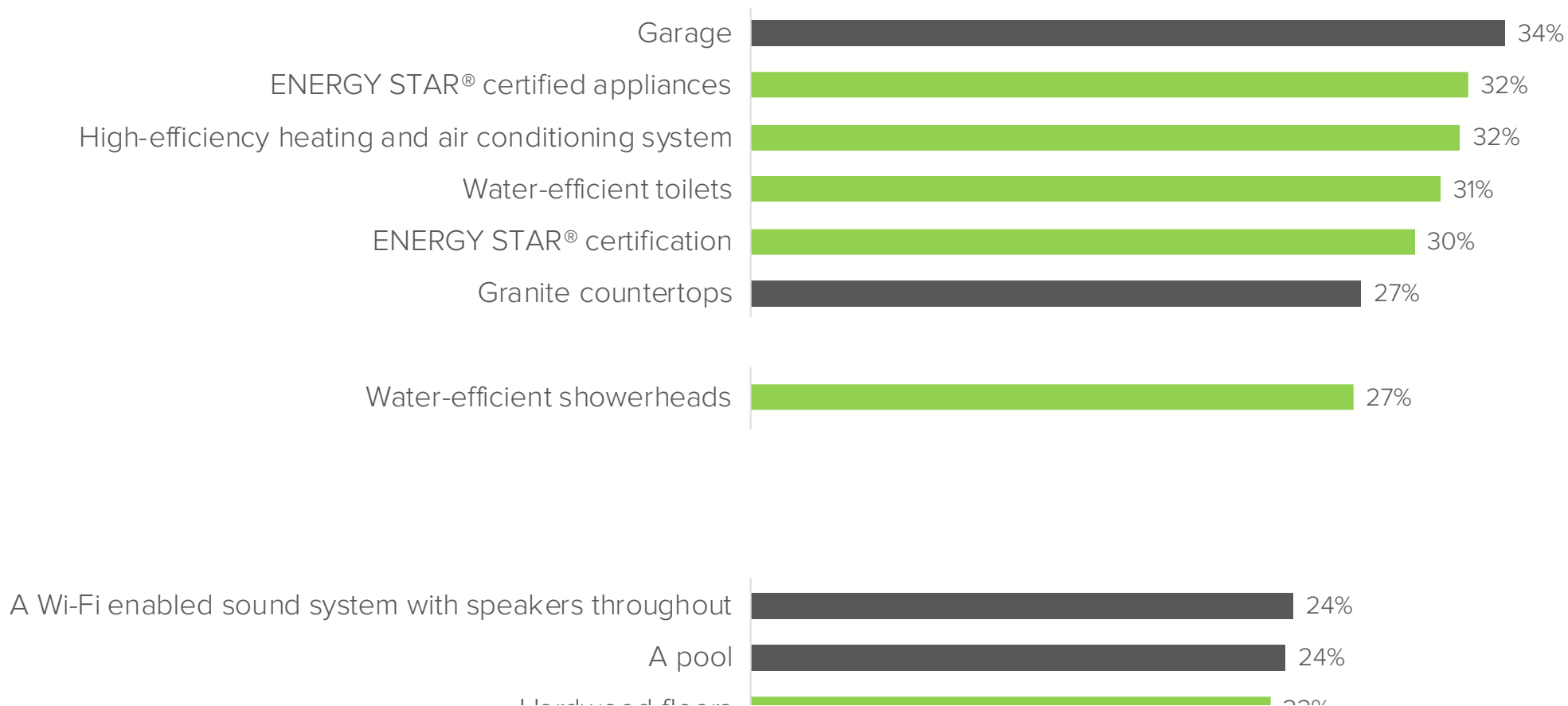
of Americans say they are planning to buy a home in the next 2 years

Garages, granite countertops, sound systems and pools still make the top 15 list for features these buyers want...

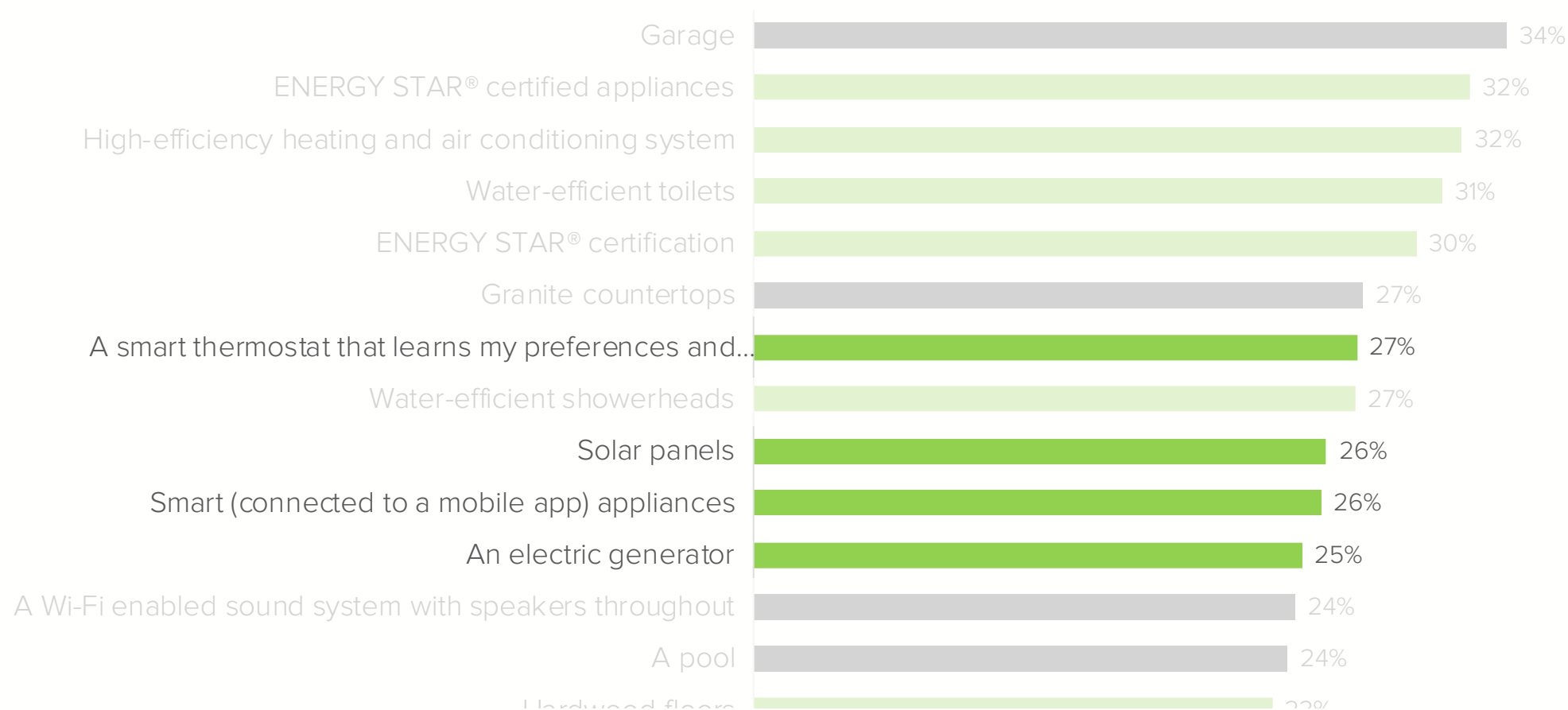




... yet ENERGY STAR® appliances and certification, as well as efficient HVACs and toilets, make up the bulk of the top tier.



... and smart thermostats and appliances, along with solar panels and generators, are wanted more than pools.



There's just one problem...

**Most people don't
connect their homes to
their environmental
impact**



Only
9%

Of Americans name their homes, buildings or
electricity production as a leading cause of
climate change

46%

Admit they've done nothing to improve the efficiency of their homes

So why is that?

Why the giant disconnect?



Save Energy for a Sustainable Future

For more information please visit www.beeindia.gov.in



Tips on Saving Money and Energy in Your Home



U.S. DEPARTMENT OF ENERGY | Office of ENERGY EFFICIENCY & RENEWABLE ENERGY

The Greeneres
PRESENT
THE BEST HOUSEHOLD TIPS
FOR SAVING MONEY AND ENERGY

Panasonic LED

**Save Energy Today
for a Shining Future**
National Energy Conservation Day
Dec - 14

CONSERVE TO SAVE THE Planet OR THE Money?
YOU'RE GOOD EITHER WAY.

Find the tools to fit your energy-savings goals.

TAKE QUIZ

THE POWER OF ENERGY SAVINGS



INFORMAL ENERGY
COUNCIL ON ENERGY EFFICIENCY

Valletta, 18-19 May 2017



SAVE ENERGY LA

Wash your clothes
on cold to save
energy and money.

LEARN TO SAVE MONEY ON ENERGY COSTS

WEDNESDAY, JULY 25, AT 6:30PM
CITY HALL COUNCIL CHAMBERS

MICHELE CALABRESE
NJ CLEAN ENERGY PROGRAM
RESIDENTIAL INCENTIVES FOR EFFICIENCY

JULIO GARCIA
EXECUTIVE DIRECTOR, PACO
5 TOP WEATHERIZATION WAYS TO SAVE ENERGY

LAURA PIRAINO
JC OFFICE OF SUSTAINABILITY
TIME TO SWITCH! LED'S, AND OTHER
NO COST/LOW COST WAYS TO SAVE ENERGY



What people do when we say “save money” or “save energy”



Most people don't think they need energy efficiency.

79%

of Americans
don't think they
use more energy
than they did 5
years ago

44%

think their
homes are
already
energy
efficient



Most people think energy efficiency doesn't work.

50%

claim to have
made 1-3
efficiency
improvements
to their homes

63%

of those
people say
their utility
bills did not
go down



60%

How much Americans expect to save on their utility bill if they spend \$1,500 on energy-efficient products or improvements

84%

say they know **only a little or nothing** about what to do to improve home energy efficiency



Bottom line:

Screaming "save money" isn't the way in.

Messaging that aligns with what they actually care about is.

Americans are worried about how the products in their lives the impact on their health

We're starting to avoid buying products we fear might contaminate our bodies or have adverse effects

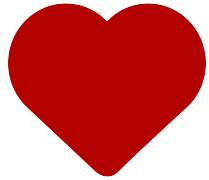
*"I use [The Honest Company's organic all-purpose balm] in place of Vaseline. It has no petroleum and is totally organic...Products containing petroleum jelly can contaminate the body, interfere with estrogen levels, and may contain carcinogenic substances."
-Eco Pulse Online Ethnography Participant, 2018*



But we aren't just motivated by our own health—the health and safety of our families is an important motivator, as well

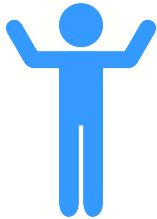
“When my kids were little, [the Honest Company] had a baby body care line, and it was ridiculously expensive. But I didn't care. I think like most parents I tend to spend a lot more money on the kids' stuff than I would myself because you want it to be all organic and you don't want it to have dyes.”
-Eco Pulse Online Ethnography Participant, 2018

When it comes to the health and safety of products, there are 3 important product categories:



In-me products

In-me products are defined as anything the consumer might eat or drink
Examples: Food items, drinks, medicines, etc.



On-me products

On-me products are defined as anything that comes in contact with the consumer's body, but is not consumed
Examples: Personal care items, clothing, etc.



Around-me products

Around-me products are defined as anything that exists in a consumer's environment, but does not necessarily come into direct contact with the consumer
Examples: Insulation, paint, flooring, etc.



We thought that Americans would care more about



products they eat (**In Me**) or touch (**On Me**) than

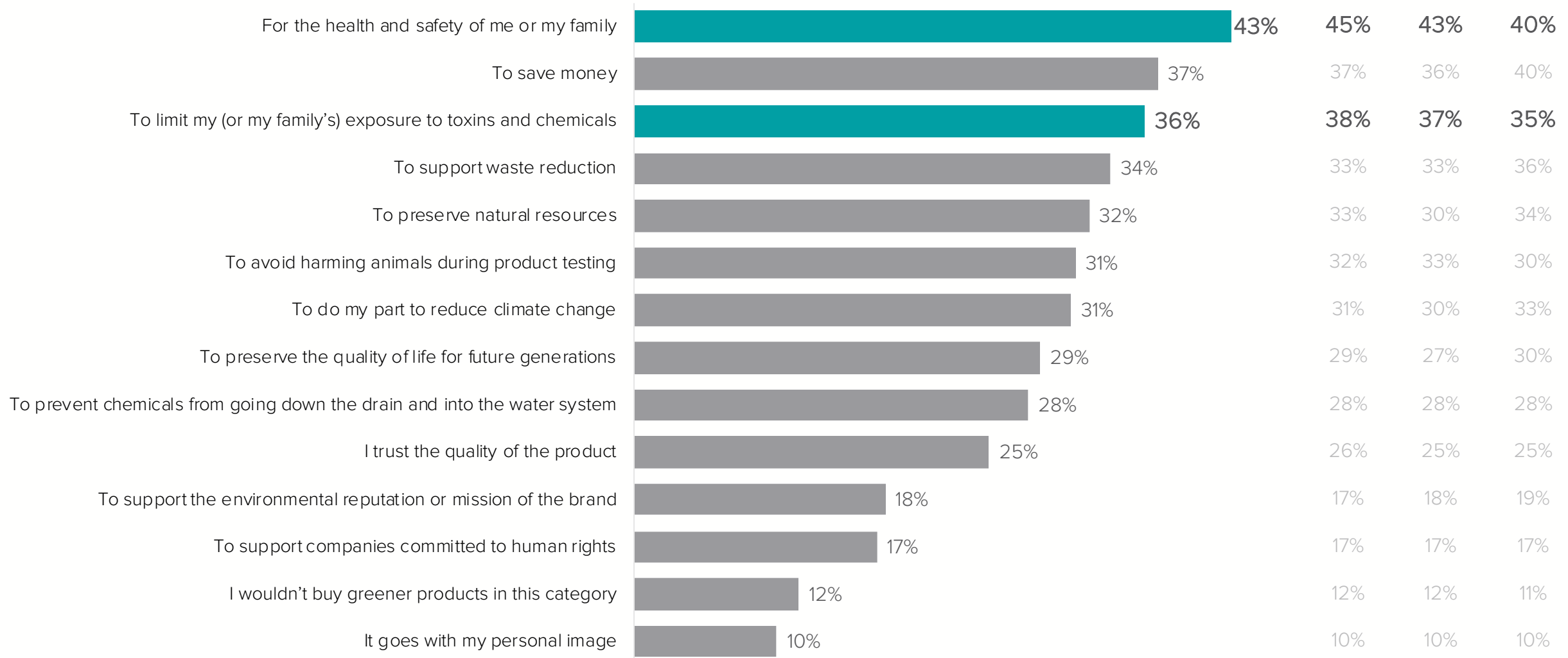


products in their environment (**Around Me**)

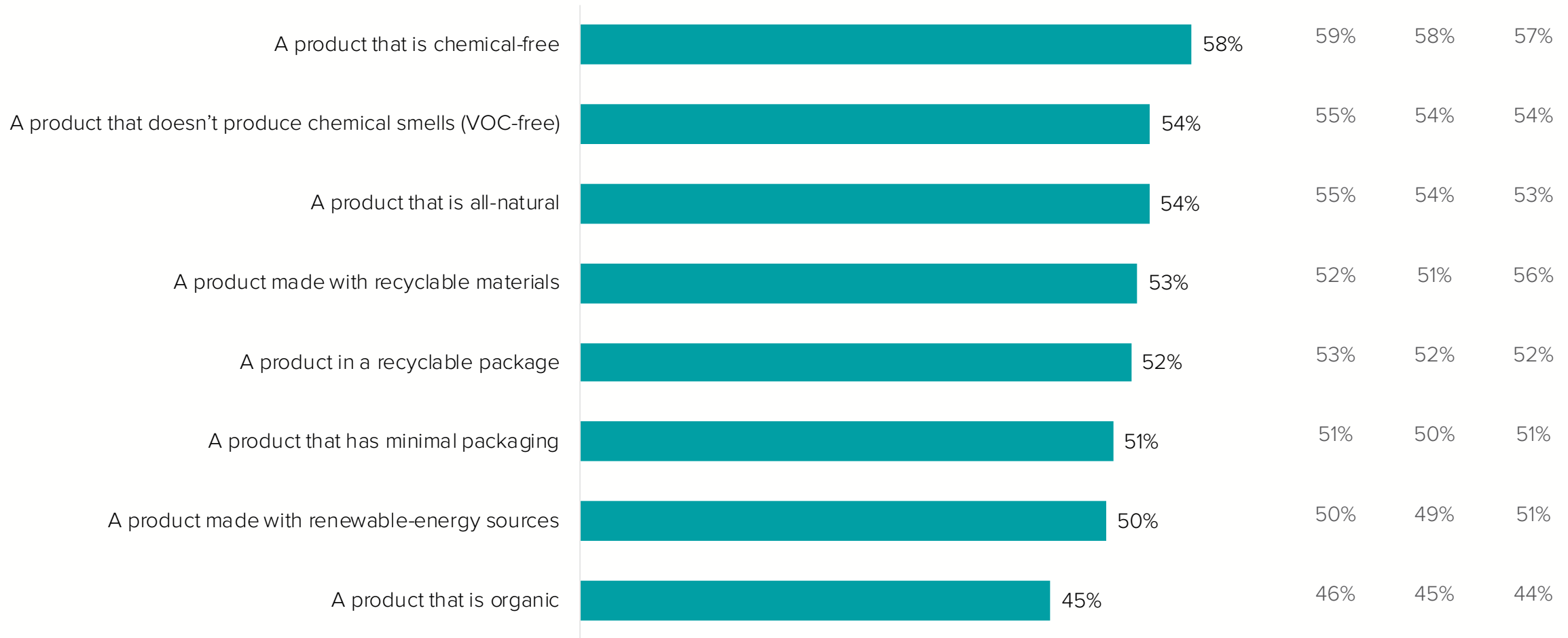
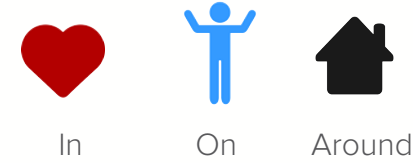
But we were surprised!

1. Thinking about products you eat or drink, which of the following are reasons why you would choose a greener product option?
2. Thinking about products that come in contact with your body, but you do not consume, which of the following are reasons why you would choose a greener product option?
3. Thinking about products or materials for your home or work (e.g., furniture, windows, flooring, insulation, paint, etc.), which of the following are reasons why you would choose a greener product option?

The drivers for choosing greener products in all three categories are surprisingly similar



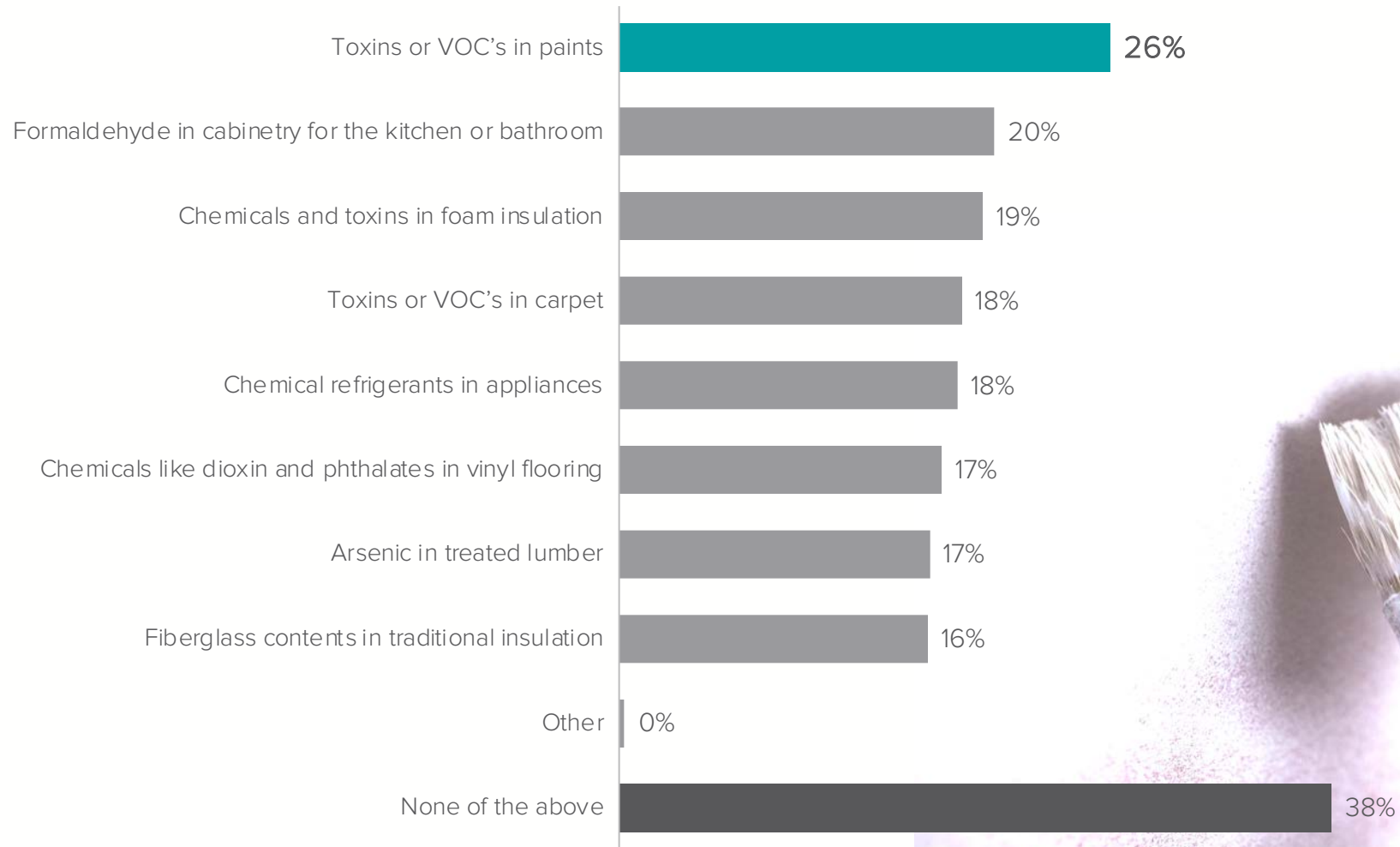
And the intensity of the **specific health drivers** that influence purchase decisions are similar too, regardless of category





We dug a little deeper in the “around me” category, thinking specifically about their home environments

When it comes to home products, their health concerns are about chemicals/toxins



And those concerns about the home environment are just one indicator of an **overarching trend** that's emerging:

A woman with short, grey hair is smiling and looking to her left. She is wearing a grey and black patterned athletic jacket with a bright yellow zipper. She is standing on a bridge or walkway with a metal railing. The background is a blurred cityscape with buildings and a street. In the top left corner, there are four small, vertically aligned green circles.

Health has become a key driver in the home space

Source: *Eco Pulse™*, Shelton Group, 2018

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72%

believe their house has a moderate to strong impact on their health

Indoor air quality is a
big part of health in
the home...

Source: *Energy Pulse™*, Shelton Group, 2019

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60%

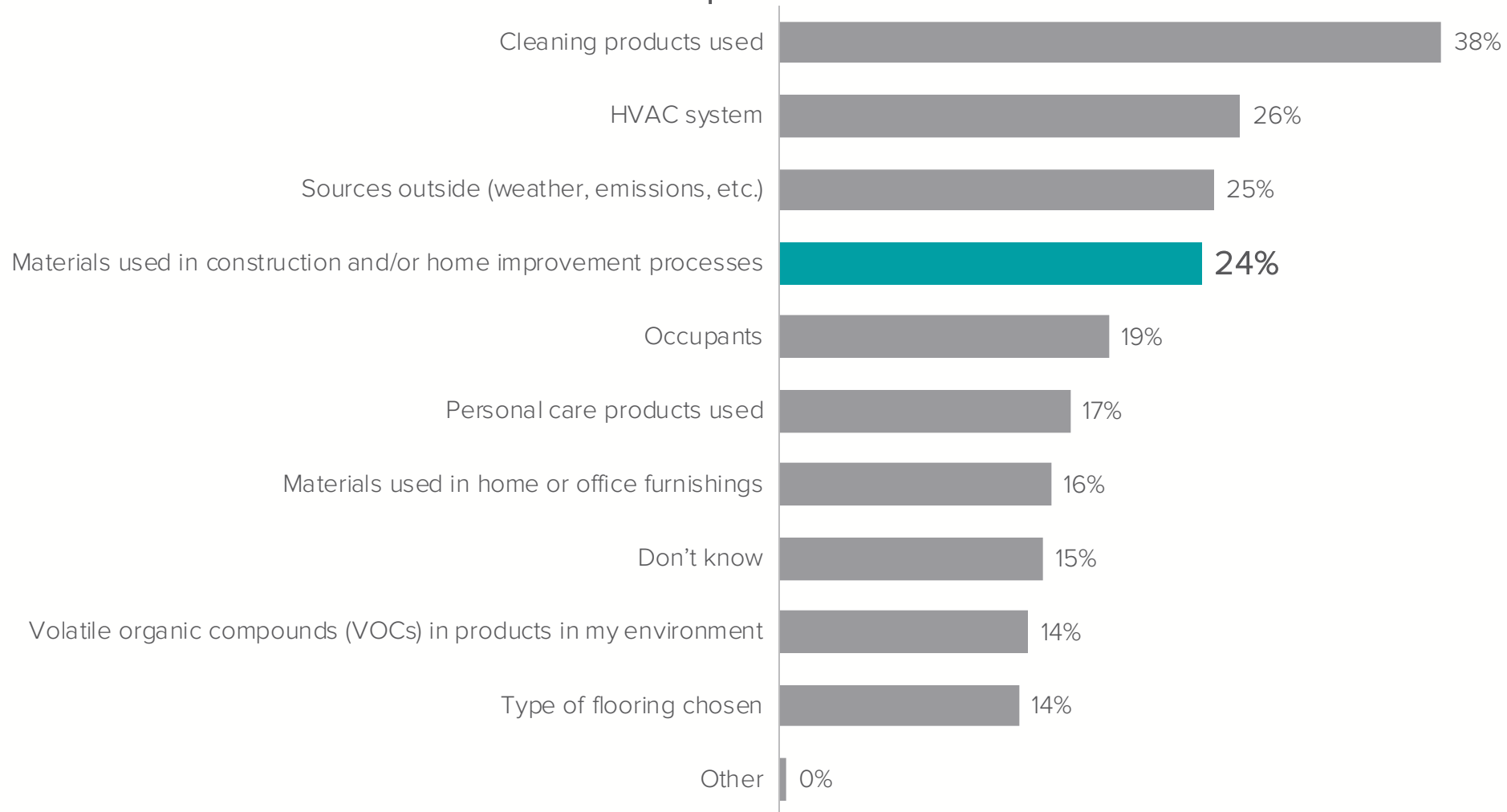
are at least moderately concerned about
indoor air quality

Which often leads to considering upgrades to ventilation systems

51%

of consumers say it is important to upgrade the air ventilation system in their homes

They perceive IAQ issues to stem from the original construction of the home; nearly 1 in 4 believe construction materials are the cause of poor IAQ



But it's not just air quality they're concerned with

Water systems are candidates for upgrades as well

43%

of consumers believe they would see an improvement in their health if they upgraded their home's water system

How much each statement describe your feelings about creating and living in a healthy home?

So what can home builders offer consumers to meet this desire for “healthy”?



Source: *Energy Pulse*™, Shelton Group, 2019

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71%

of consumers believe that an energy-efficient home is a healthy home

47%

of consumers believe that smart technology
makes a healthy home possible

**And layering smart
tech with EE only
makes each more
appealing**



58%

of consumers are somewhat
to very interested in adding
smart tech to their home for
EE reasons

**In short, a smart, energy-efficient
home is a healthy home**

So where do smart and EE overlap?

EE Technology

*Devices, machines, or products
designed to monitor or reduce
energy use*



Smart Technology

*Devices controlled via the internet or
mobile devices; learned behavior
devices*

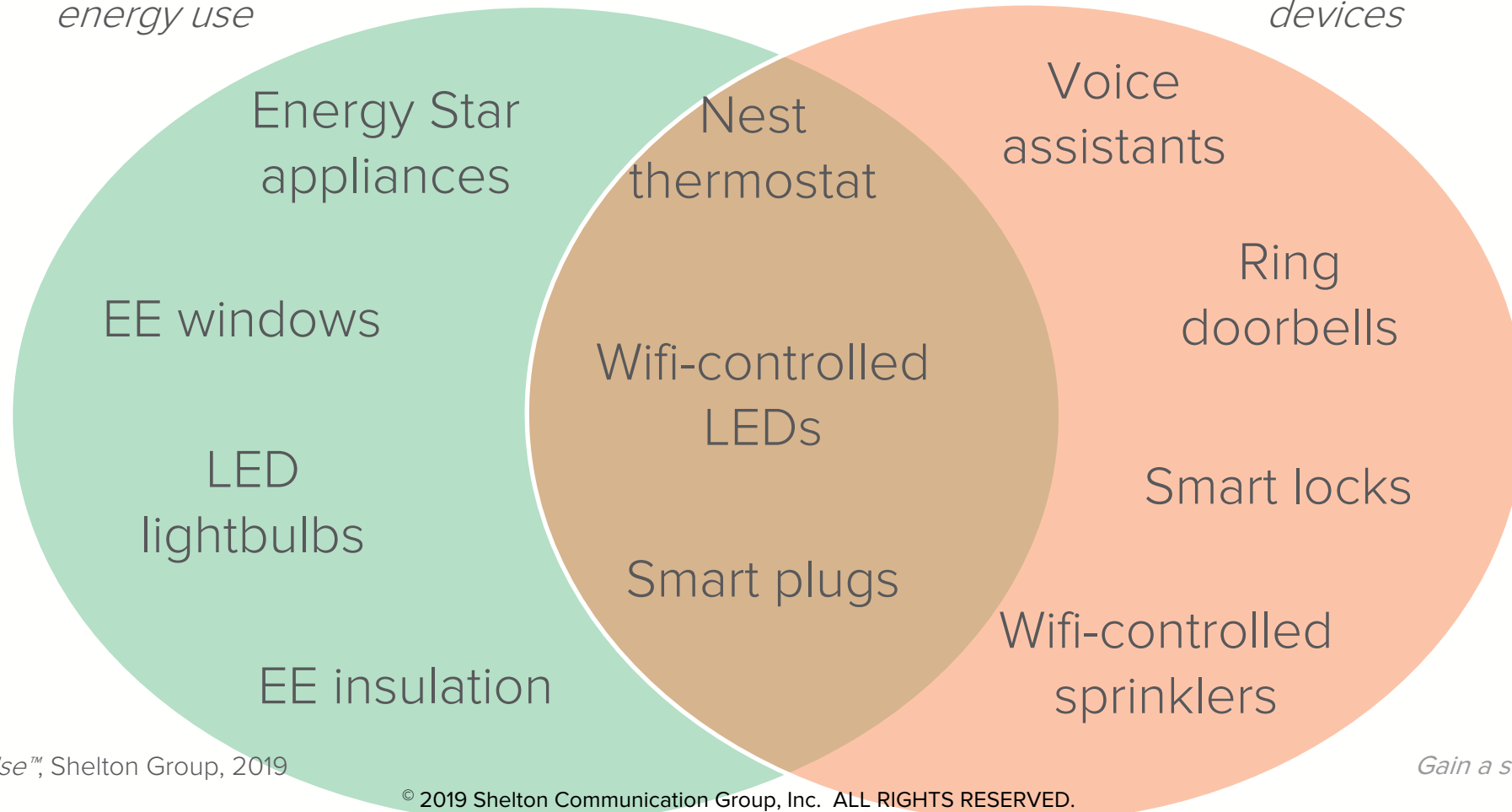


EE Technology

Devices, machines, or products designed to monitor or reduce energy use

Smart Technology

Devices controlled via the internet or mobile devices; learned behavior devices



What is smart and EE technology doing for consumers now?



Source: *Energy Pulse™*, Shelton Group, 2019

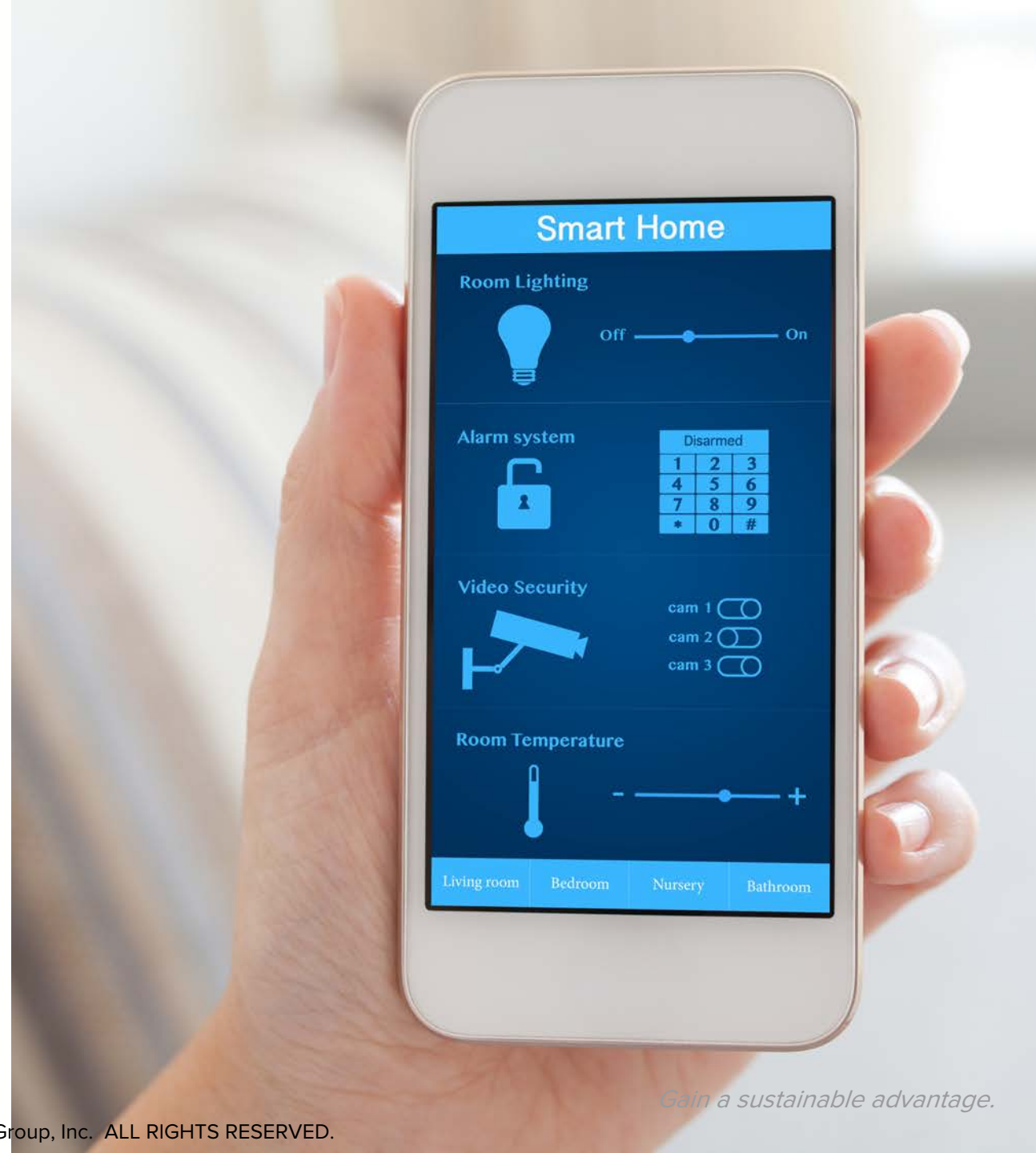
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61%

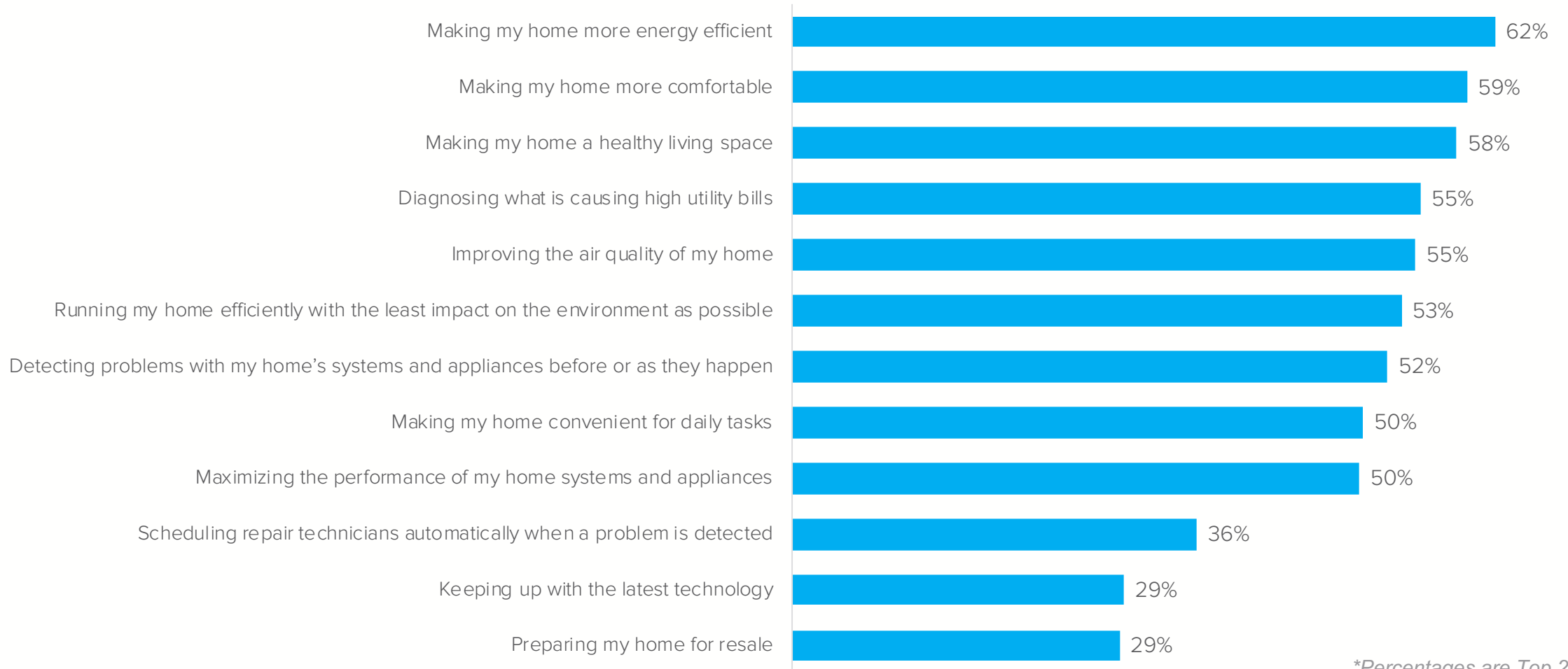
of consumers agree that smart home technology
makes their life easier

**Smart home technology defined as devices controlled via the internet or mobile device and learned-behavior devices*

Smart tech provides tangible benefits like...



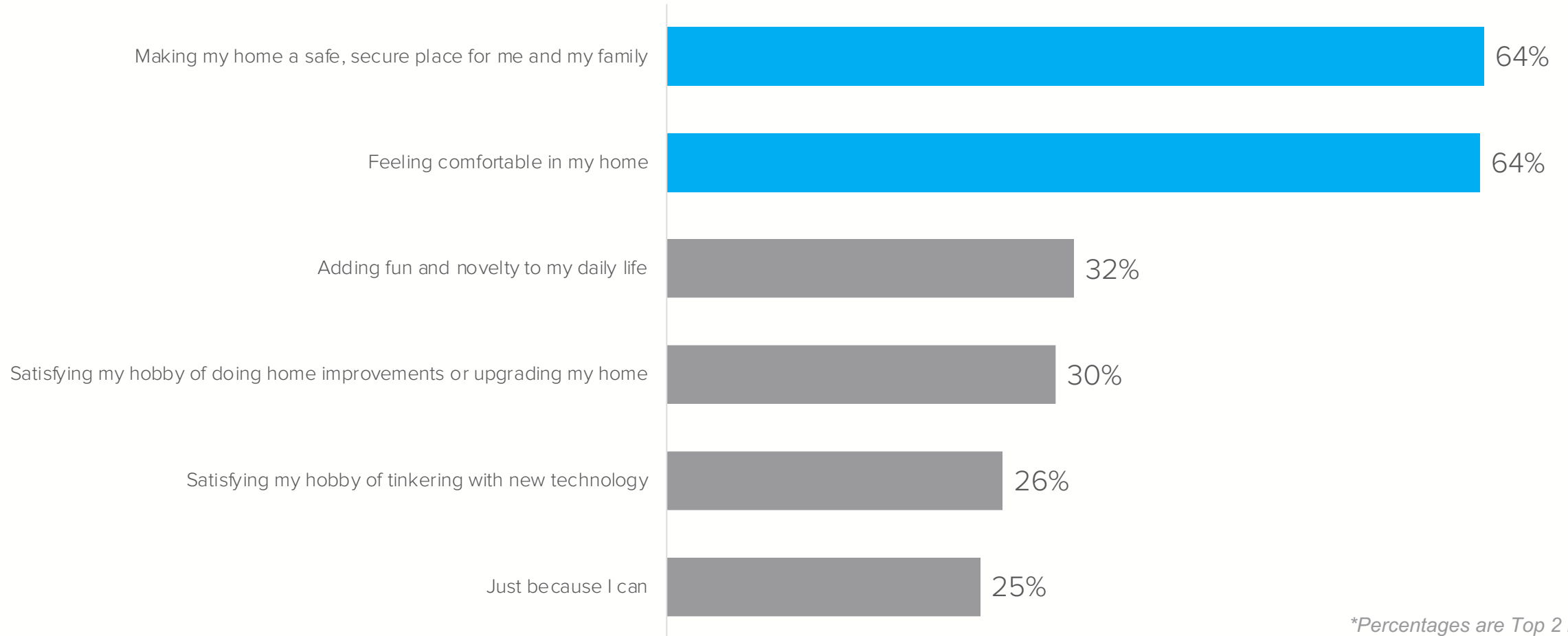
...alleviating the hassles of everyday life




*Percentages are Top 2 box

...but it also gives emotional
benefits such as

A sense of security, entertainment, peace of mind, etc.



*Percentages are Top 2 box

A man wearing a blue polo shirt, a blue baseball cap, and red work gloves is working on a dark brown metal roof gutter. He is leaning over the gutter, possibly cleaning or inspecting it. The background shows a light-colored house with a window and a brick chimney. The scene is brightly lit, suggesting a sunny day.

Think of it this way: **Homes used to be something we took care of ...**

Source: *Energy Pulse* - Shelton Group, 2019

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**...now homes are starting to take
care of us.**



Source: *Energy Pulse*™, Shelton Group, 2019

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Consumers want a home that will take care of their health but getting there isn't free.

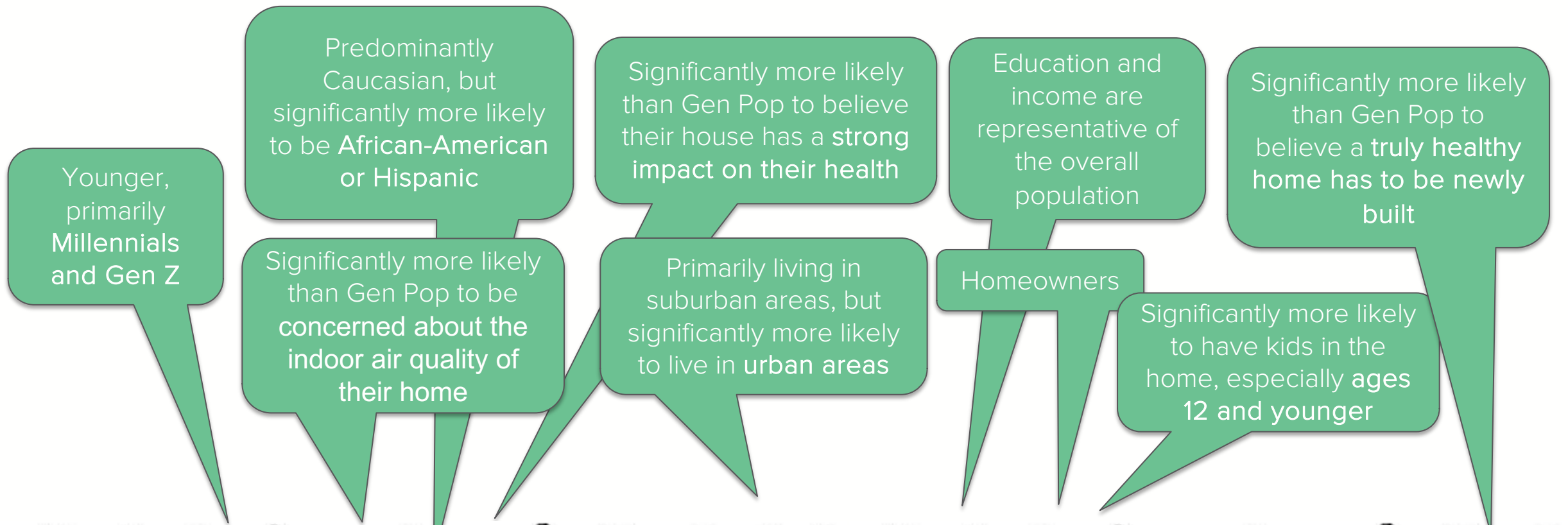
So who is actually willing to pay more right now?

25%

of the population are strong believers in the connection between a home's health and one's personal health.

Let's call them the *Healthy Home Believers*.

Healthy Home Believers are...



They believe even more strongly than the general population that energy-efficiency leads to health

90%

of Believers agree that an energy-efficient home is a healthy home

(remember it was **71%** overall)

So they have a bias for action

92%

of Believers say it is important to upgrade their air ventilation system

69%

of Believers routinely have their homes checked for issues such as air quality, moisture, contaminants, and pests

**And they're willing to invest in
meeting healthy home standards
now**

87%

of Believers believe “upgrading my home systems to meet healthy home standards is a smart investment right now”

94%

of Believers would be likely to pay slightly more for a home that has healthy indoor air quality

91%

of Believers would be likely to pay slightly more for a home that has higher energy efficiency ratings

And almost a third of them are in the market for a new home

32%

are likely to build or purchase a newly built (not previously-owned) home in the next two years

These Believers are:

- ✓ in the market for a new home
- ✓ very interested in a healthy home
- ✓ and willing to pay more for it

What's standing in the way of Believers having the healthy home they desire?



31%

of Believers are **overwhelmed**
with the choices

26%

of Believers **don't know what's**
best for my home or the way I
live

The same pattern holds true for the barriers to adopting more smart technology



25%

of Believers are **overwhelmed**
with the choices

25%

of Believers **don't know what**
technology is best for my home
or the way I live

Remember, Believers already want these products in their homes.

Effective messaging in this case needs to address and alleviate the barriers and concerns they have.

Here is some vocabulary to help you market and message to these Healthy Home Believers

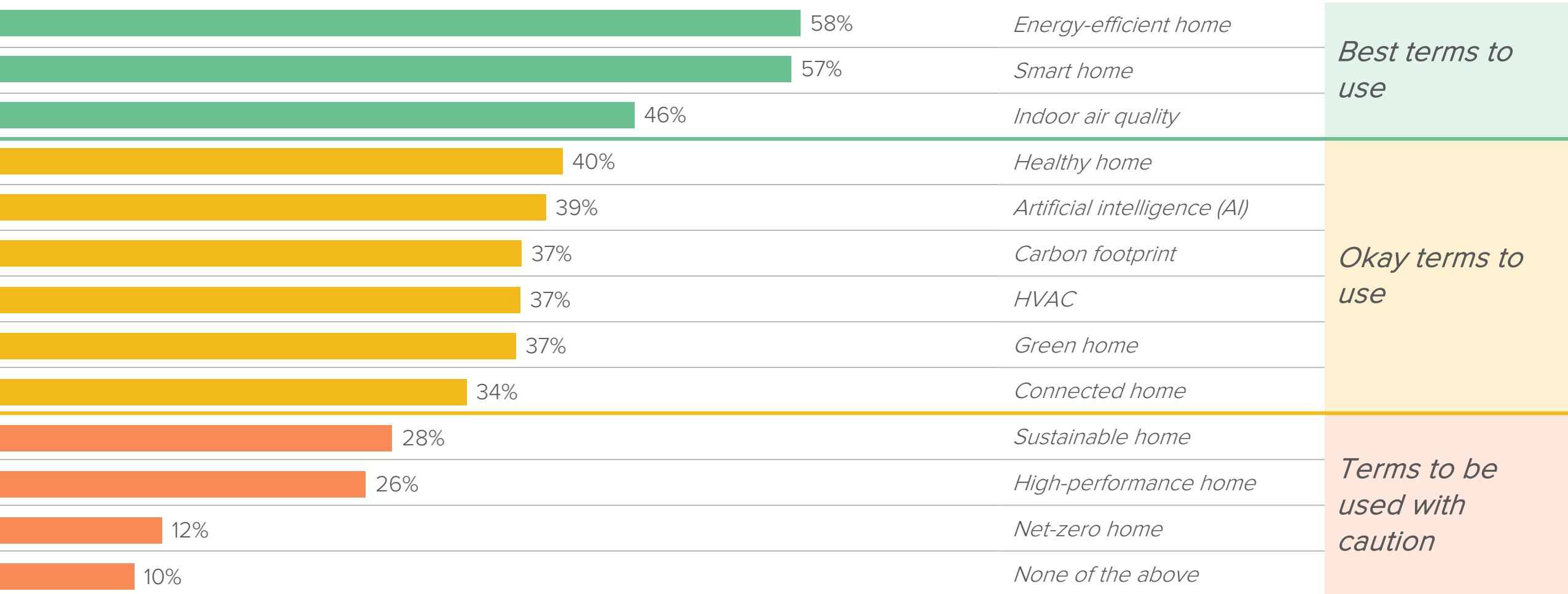


Source: *Energy Pulse™*, Shelton Group, 2019

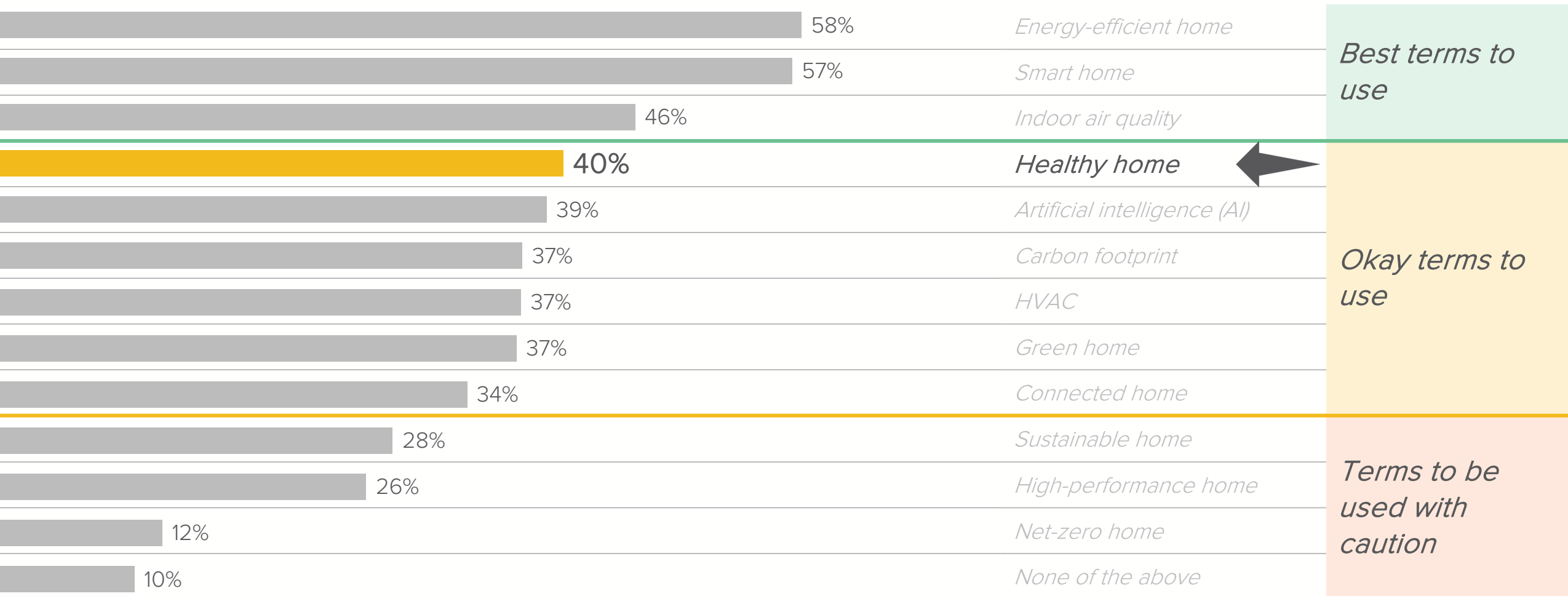
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Gain a sustainable advantage.

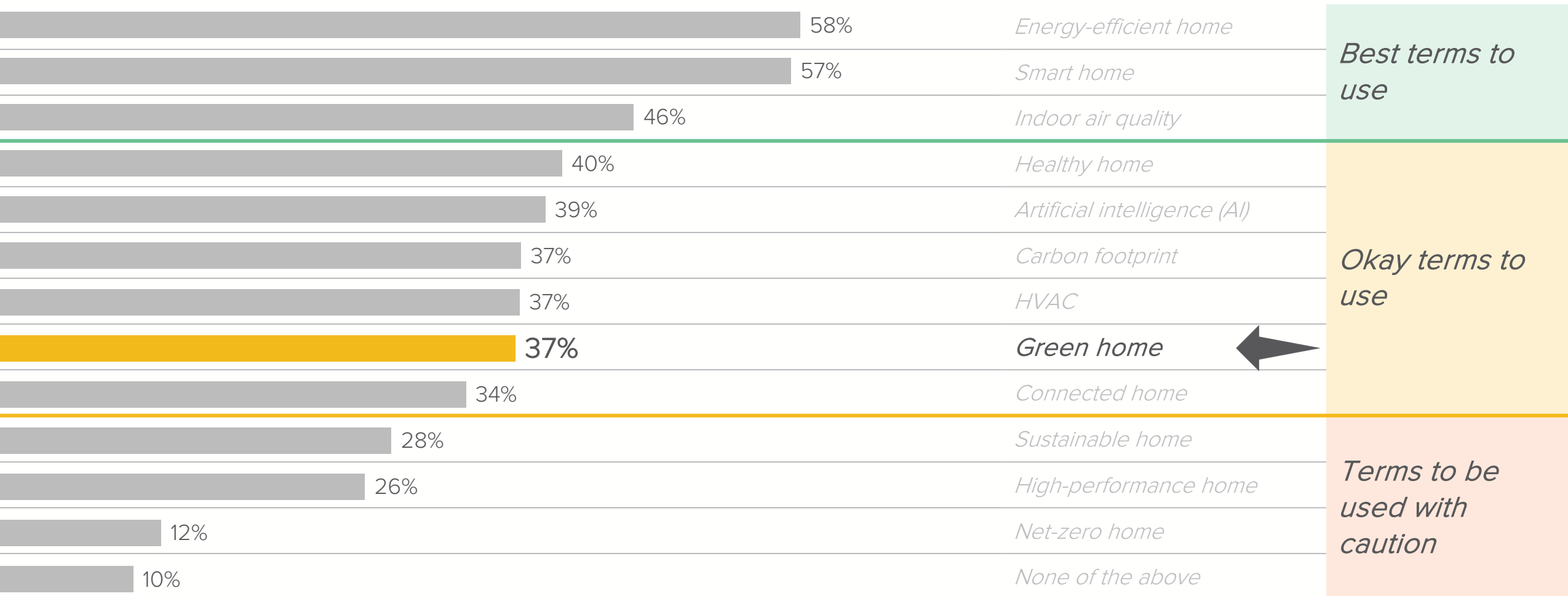
Believers are more familiar with some terms over others—it's best to avoid using terms that may lead to confusion



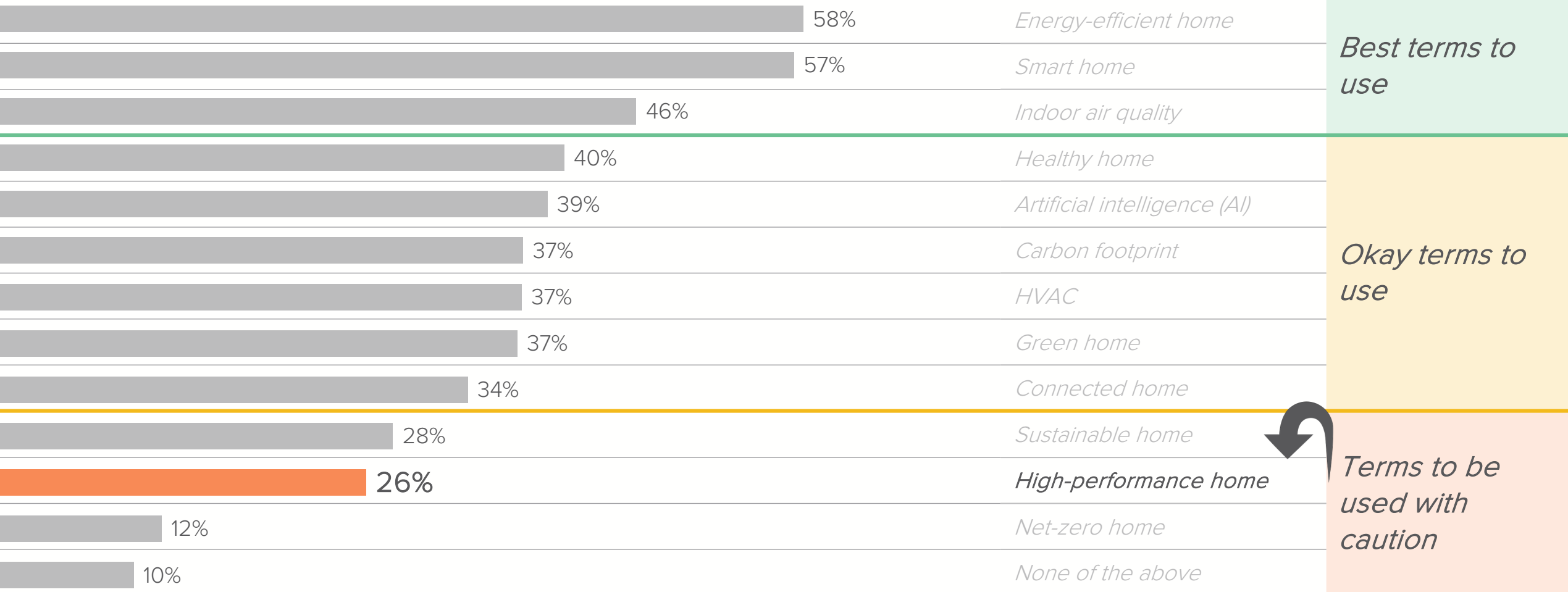
Believers are almost twice as likely as all others to feel comfortable using the term “healthy home”



Believers are significantly more likely than all others to feel comfortable using the term “green home”



Even though it's lower overall, Believers are almost 3 times as likely than all others to feel comfortable using the term "high-performance home"



In order to move consumers from desire to action on healthier, higher-performing homes, you need to overcome the barriers and use the right words.

How do you take this step?

A couple of quick examples

3 pathways: Control/quality; comfort; health/peace of mind

Thermal Performance Air Tightness Acoustics Moisture Management

There's more to insulation than you think.

Find out more

CertainTeed
SAINT-GOBAIN
Insulation

Engineered for **comfortable** to protect

Find out more

CertainTeed
SAINT-GOBAIN
Insulation

When "good enough" isn't good enough, choose **CertainTeed** Insulation.

Find out more

CertainTeed
SAINT-GOBAIN
Insulation

Remodeling? **Your insulation matters.**

Choose **CertainTeed**

CertainTeed
SAINT-GOBAIN
Insulation

SMARTBATT™ Insulation helps protect your home & family.

Here's how

CertainTeed
SAINT-GOBAIN
Insulation

SMARTBATT™ knows how to help keep mold out of your walls.

Find out how

CertainTeed
SAINT-GOBAIN
Insulation

Breathe easy with
fiberglass insulation.

**Insulation
Institute™**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

77%

of new homes have it.

**Insulation
Institute™**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

So should yours.

Find out why

**Insulation
Institute™**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Fiberglass
insulation.

Breathe
easy.

**Insulation
Institute**[™]

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Fiberglass
insulation.

Safe
and
proven

for more
than
75 years.

**Insulation
Institute**[™]

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Fiberglass
insulation.

A
smart
choice.

Learn more

**Insulation
Institute**[™]

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Gain a sustainable advantage.

Choose fiberglass
insulation.



**Insulation
Institute.**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Your family
deserves it.



**Insulation
Institute.**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

It's safe, it's proven.
It's non-petrochemical.

[Tell me more](#)



**Insulation
Institute.**

KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Gain a sustainable advantage.

Fiberglass insulation.

Safe and proven

for more than 75 years.

Fiberglass insulation.

- ☑ Safe.
- ☑ Proven.
- ☑ Non-petrochemical.



It's safe, it's proven, it's a smart choice.

[Tell me more](#)

Insulation Institute
KNOWLEDGE. LEADERSHIP. CONFIDENCE.

☑ Familiar ingredients – non-petrochemical.

Insulation Institute
KNOWLEDGE. LEADERSHIP. CONFIDENCE.

☑ Fiberglass insulation. A smart choice.

[Discover why](#)

Insulation Institute
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Insulation Institute
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Insulation Institute
KNOWLEDGE. LEADERSHIP. CONFIDENCE.

Get the facts about fiberglass

Whether you're remodeling your home or building a new one, you have a mind-numbing number of decisions to make. With everything you have to think about, what's going inside your walls - where no one will know or see what's in them - is probably not near the top of your list. But it should be.

There are choices when it comes to the type of insulation used in your home. Spray foam, mineral wool, cellulose, fiberglass - and the choice is important. Your family's comfort, their health, and even the resale value of your home depend on it. Your builder or contractor will have valuable input, but remember ... **the choice is always yours.**

But don't worry. We're here with help.

Breathe easy.

The truth is, only one type of insulation meets the highest standards for comfort, efficiency and value, and it does so with safe, mineral-based ingredients - **fiberglass.**

Once you get the facts about fiberglass, you'll want to have a little chat about it with your builder or contractor.

Insulation Institute.
— MINERAL-BASED INSULATION EXPERTS —

Safe. Proven.

... and you can pronounce its ingredients.

Why put your foot down about fiberglass?

- Proven Performance
- Natural Ingredients
 - Fiberglass insulation is made from naturally occurring mineral-based ingredients that are processed and produced without petroleum-based and toxic substances and need no special handling skills.
- Superior Value
- No Significant Health Risks
- Environmentally Friendly



Seal windows to keep cool or hot air in



Lower the temperature on your H₂O heater to 120° F



Wash full loads of laundry using cold water



Use a clothesline instead of a dryer



Switch to LED bulbs

10 WAYS TO

REDUCE ENERGY WASTE

Lower energy bills are within your reach. Start making easy, small changes today.

For more energy-saving tips and solutions, visit KnowYourOptions.com



Use power strips and turn them off regularly



Unplug

Water

Add w

Use

in



HVAC

Helps manage humidity, prevent mold, and improve air flow



DOUBLE-PANE WINDOWS

Improves insulation for noise reduction and temperature regulation



FOUNDATION RETROFIT

Improves insulation and reduces moisture

Healthy home. Healthy family.

Updates that improve energy efficiency can help keep good air in, keep allergens out, reduce mold, and improve comfort.

BREATHE EASY WITH 6 ENERGY EFFICIENCY HEALTH UPDATES



SEALING

Keeps good air in and allergens out



INSULATION

Improves temperature regulation and air quality



VAPOR RETARDER

Works with insulation to create a moisture barrier



Energy efficiency updates.

Your home can be updated in big and small ways, a little at a time or all at once. Talk to your lender about financing options.



A healthy home is within reach

The HomeStyle® Energy Mortgage makes it possible to add energy efficiency features that make your family's home a healthy place to live. Bundling energy efficiency update costs into your mortgage creates one convenient and affordable solution that you can take advantage of at time of purchase or refinance.

Ask your lender about your options today.



ENERGY EFFICIENCY UPGRADES ARE WITHIN REACH

Bundling the cost of upgrades with your mortgage makes them easier and more affordable than ever. Learn who to talk to and what to ask to make the process as simple as possible.

WHO TO TALK TO

Get your questions answered by the right person who to talk to.

Ask your real estate professional for property's recent utility bills, and energy efficiency upgrades, and Home Energy Scores.

Ask your lender about bundling energy efficiency upgrades into your mortgage at purchase or into your refinancing plans.

Ask your contractor about your financing priorities.

WHAT TO ASK ABOUT

Asking about these topics can save you money.



HomeStyle® Energy Mortgage Loan for home purchases or refinancing



Energy efficiency tax credits, rebates, savings and financing options available from energy.gov



Free energy assessments, rebates and money-saving solutions from your local utility



Other ways to finance energy-efficiency updates like low-interest-rate credit cards, personal loans and appliance manufacturer financing

Whether Fannie Mae's HomeStyle® Energy Mortgage is right for you? Visit KnowYourOptions.com to learn about this and other mortgage and refinancing options.

HOME PERFORMANCE MATTERS

An educational initiative developed by the National Association of REALTORS® and the National Association of Home Builders

NAHB + NAR

A high performance strategy for success in the green home marketplace

Homebuyers today are looking for healthier, more efficient homes.

81% of potential homebuyers say higher energy efficiency would influence them to pick one new home over another.

And they're willing to pay for them.

40% of potential homebuyers say they would very likely pay more for a high performance home.

But when it comes to marketing green homes, there's a gap.

29% of builders think green homes are harder to market.

61% of NAR members aren't really comfortable answering questions about home performance.

Bridge the gap. Together.

Builders

- Technical knowledge of green features
- Inventory of high performance homes

Real Estate Professionals

- Have their ear to the ground – know what homebuyers want
- Ask the right questions, can communicate high tech in lay terms

Next steps:

1. Expand your network

Connect and collaborate with local builder or NAR chapters or NAR members to strengthen your position in your local market.

2. Increase your knowledge

NAR and NAHB offer extensive education programs and professional resources to help you identify the latest high performance market trends and consumer preferences.

3. Edge out the competition

Professional designations and third-party home certifications are valued by clients and can help you stand out in your local market.

NAHB + NAR

Meet the demand for green homes together. **Get started today.**

Learn more at HomePerformanceMatters.info

REALTORS® are members of the National Association of Realtors.™

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Shelton^{Grp}

Collaboration

The key to selling more green



The demand for green homes has grown rapidly in recent years, and it shows no signs of slowing down. Why? Because homebuyers today are looking for healthier, more efficient homes.

81%

of people who expect to buy a new home in the next two years say higher energy efficiency would cause them to choose one new home over another.

33%

of single-family home builders currently build most of their homes green, and the number of homes certified to the National Green Building Standard has increased by more than 57% in just the past two years.

61%

of REALTORS® report that their clients are at least somewhat interested in sustainability.

How to Succeed

Selling green homes means building relationships. Knowing how to promote the right relationships.

- 1. Develop and use your professional network.** Homebuyers seek out the estate agents they trust. Top estate agents have their ear to what homebuyers want. Top builders with the knowledge that a performance home is right for the market can even earn a green design award from the competition.
- 2. Stand out from the crowd.** Numerous education programs can even earn a green design award from the competition.
- 3. Stay educated.** Green building benefits – continue to evolve. Trends and sustainability research from NAHB, and the Home Performance Institute.
- 4. Use the curb appeal you can control.** Certifications for the homes you build are recognized and valued by homebuyers. Stand out within your local market.
- 5. Leverage your assets.** If your data fields, work together to market and value. No green fields yet? To implement RESO standards.

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You Need to Know ...

81%

of people expecting to buy a new home within two years say higher energy efficiency would influence them to choose one new home over another

All across the country, homebuyers are shopping for healthier, more efficient homes. Green homes. High-performance homes. Builders with an eye on the future and REALTORS® focused on success are learning what high-performing features people look for in a new home. They're working together to develop homes that integrate those features, and they're working together to better market and sell those homes.

Are you? Learn more at HomePerformanceMatters.info

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To Recap

- ↗ **Health is how you sell better homes for what they're worth**
- ↗ **Simplify the options available (better, bake them in)**
- ↗ **Communicate the benefits:**
 - ↗ **Health, safety and comfort**
 - ↗ **Alleviating hassle**
 - ↗ **Peace of mind**
- ↗ **Use terms they understand**
- ↗ **Provide clear recommendations for their needs**

Discussion

Thank you!

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Thank you!

Join the conversation - #EEBASummit2019

Save the dates for next year:



The logo for the High Performance Home Summit 2020 features a green square icon with a white house outline and a spiral inside. To its right is a blue horizontal line with three circular icons: a green leaf, a red atom, and an orange graduation cap. Below the line, the text "HIGH PERFORMANCE HOME SUMMIT 2020" is displayed in a grey, sans-serif font. At the bottom, a blue bar contains the text "SEPT 29 - OCT 1 \ DENVER" in white. The acronym "EEBA™" is positioned to the left of the blue bar.

EEBA™

HIGH PERFORMANCE
HOME SUMMIT 2020

SEPT 29 - OCT 1 \ DENVER

