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

Brands & Stands
Social purpose is the new black

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

Source: Millennial Pulse 2017

n=2,025
Would you like to be seen as someone who buys eco-friendly products?

Source: Eco Pulse 2018
n=2,012

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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.
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 25% 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.
nationally representative sample of 100% of Americans

20% of Americans say they are planning to buy a home in the next 2 years.

Just over half (55%) of those in the market for a new home say that energy efficiency would very/strongly impact their new home purchase decision.

45% of those in the market for a new home don’t think about energy efficiency when purchasing.
Garages, granite countertops, sound systems and pools still make the top 15 list for features these buyers want...

- Garage 34%
- Granite countertops 27%
- A Wi-Fi enabled sound system with speakers throughout 24%
- A pool 24%
- Hardwood floors 20%

Q24 - Which of the following features do you want your new home to have?

n=223

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

- Garage: 34%
- ENERGY STAR® certified appliances: 32%
- High-efficiency heating and air conditioning system: 32%
- Water-efficient toilets: 31%
- ENERGY STAR® certification: 30%
- Granite countertops: 27%
- Water-efficient showerheads: 27%
- A Wi-Fi enabled sound system with speakers throughout: 24%
- A pool: 24%
- Hardwood floors: 20%

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... 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.

Source: Energy Pulse 2018
46%

Admit they’ve done nothing to improve the efficiency of their homes
So why is that?

Why the giant disconnect?
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.

Source: Energy Pulse 2018
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

Source: Energy Pulse 2016
60%

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

Source: Energy Pulse 2018
84% say they know only a little or nothing about what to do to improve home energy efficiency.

Source: Energy Pulse 2018 n=2,009
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.

Source: *Eco Pulse™*, Shelton Group, 2018
We thought that Americans would *care more* about products they eat *(In Me)* or touch *(On Me)* than products in their environment *(Around Me)*.

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>In</th>
<th>On</th>
<th>Around</th>
</tr>
</thead>
<tbody>
<tr>
<td>For the health and safety of me or my family</td>
<td>45%</td>
<td>43%</td>
<td>40%</td>
</tr>
<tr>
<td>To save money</td>
<td>37%</td>
<td>36%</td>
<td>40%</td>
</tr>
<tr>
<td>To limit my (or my family’s) exposure to toxins and chemicals</td>
<td>38%</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td>To support waste reduction</td>
<td>33%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>To preserve natural resources</td>
<td>33%</td>
<td>30%</td>
<td>36%</td>
</tr>
<tr>
<td>To avoid harming animals during product testing</td>
<td>32%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>To do my part to reduce climate change</td>
<td>31%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>To preserve the quality of life for future generations</td>
<td>29%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>To prevent chemicals from going down the drain and into the water system</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>I trust the quality of the product</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>To support the environmental reputation or mission of the brand</td>
<td>17%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>To support companies committed to human rights</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>I wouldn’t buy greener products in this category</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>It goes with my personal image</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Eco Pulse™, Shelton Group, 2018

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

<table>
<thead>
<tr>
<th>Product Description</th>
<th>In (%)</th>
<th>On (%)</th>
<th>Around (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A product that is chemical-free</td>
<td>58</td>
<td>59</td>
<td>57</td>
</tr>
<tr>
<td>A product that doesn't produce chemical smells (VOC-free)</td>
<td>54</td>
<td>55</td>
<td>54</td>
</tr>
<tr>
<td>A product that is all-natural</td>
<td>54</td>
<td>55</td>
<td>53</td>
</tr>
<tr>
<td>A product made with recyclable materials</td>
<td>53</td>
<td>52</td>
<td>56</td>
</tr>
<tr>
<td>A product in a recyclable package</td>
<td>52</td>
<td>53</td>
<td>52</td>
</tr>
<tr>
<td>A product that has minimal packaging</td>
<td>51</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>A product made with renewable-energy sources</td>
<td>50</td>
<td>50</td>
<td>51</td>
</tr>
<tr>
<td>A product that is organic</td>
<td>45</td>
<td>46</td>
<td>44</td>
</tr>
</tbody>
</table>

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

- Toxins or VOC's in paints: 26%
- Formaldehyde in cabinetry for the kitchen or bathroom: 20%
- Chemicals and toxins in foam insulation: 19%
- Toxins or VOC's in carpet: 18%
- Chemical refrigerants in appliances: 18%
- Chemicals like dioxin and phthalates in vinyl flooring: 17%
- Arsenic in treated lumber: 17%
- Fiberglass contents in traditional insulation: 16%
- Other: 0%
- None of the above: 38%

Source: *Eco Pulse™*, Shelton Group, 2018
And those concerns about the home environment are just one indicator of an overarching trend that’s emerging:
Health has become a key driver in the home space

Source: Eco Pulse™, Shelton Group, 2018
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...
60% are at least moderately concerned about indoor air quality.

Source: Energy Pulse®, Shelton Group, 2019

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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

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

Source: Energy Pulse™, Shelton Group, 2019

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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?

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

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

Source: Energy Pulse™, Shelton Group, 2019
71% of consumers believe that an energy-efficient home is a healthy home.

Source: Energy Pulse™, Shelton Group, 2019
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

How interested are you in adding smart home features for EE reasons – maximizing how heating/cooling systems work or using less energy overall, etc.?*

Source: Energy Pulse™, Shelton Group, 2019

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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

Source: Energy Pulse™, Shelton Group, 2019
Smart Technology

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

Source: Energy Pulse™, Shelton Group, 2019

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EE Technology

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

- Energy Star appliances
- EE windows
- LED lightbulbs
- EE insulation

Smart Technology

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

- Nest thermostat
- Wifi-controlled LEDs
- Smart plugs

- Voice assistants
- Ring doorbells
- Smart locks
- Wifi-controlled sprinklers

Source: Energy Pulse®, Shelton Group, 2019

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What is smart and EE technology doing for consumers now?

Source: Energy Pulse®, Shelton Group, 2019
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

Making my home more energy efficient: 62%
Making my home more comfortable: 59%
Making my home a healthy living space: 58%
Diagnosing what is causing high utility bills: 55%
Improving the air quality of my home: 55%
Running my home efficiently with the least impact on the environment as possible: 53%
Detecting problems with my home’s systems and appliances before or as they happen: 52%
Making my home convenient for daily tasks: 50%
Maximizing the performance of my home systems and appliances: 50%
Scheduling repair technicians automatically when a problem is detected: 36%
Keeping up with the latest technology: 29%
Preparing my home for resale: 29%

*Percentages are Top 2 box

Source: Energy Pulse®, Shelton Group, 2019
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...but it also gives **emotional benefits** such as
A sense of security, entertainment, peace of mind, etc.

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<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
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<td>Making my home a safe, secure place for me and my family</td>
<td>64%</td>
</tr>
<tr>
<td>Feeling comfortable in my home</td>
<td>64%</td>
</tr>
<tr>
<td>Adding fun and novelty to my daily life</td>
<td>32%</td>
</tr>
<tr>
<td>Satisfying my hobby of doing home improvements or upgrading my home</td>
<td>30%</td>
</tr>
<tr>
<td>Satisfying my hobby of tinkering with new technology</td>
<td>26%</td>
</tr>
<tr>
<td>Just because I can</td>
<td>25%</td>
</tr>
</tbody>
</table>

*Percentages are Top 2 box

Source: Energy Pulse™, Shelton Group, 2019
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Think of it this way: **Homes used to be something we took care of ...**
...now homes are starting to take care of us.
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...

- Younger, primarily Millennials and Gen Z
- Predominantly Caucasian, but significantly more likely to be African-American or Hispanic
- Significantly more likely than Gen Pop to believe their house has a strong impact on their health
- Primarily living in suburban areas, but significantly more likely to live in urban areas
- Homeowners
- Significantly more likely than Gen Pop to have kids in the home, especially ages 12 and younger
- Education and income are representative of the overall population
- Significantly more likely than Gen Pop to believe a truly healthy home has to be newly built
- Significantly more likely than Gen Pop to be concerned about the indoor air quality of their home

Source: Energy Pulse®, Shelton Group, 2019

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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

Source: Energy Pulse®, Shelton Group, 2019

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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.

Source: Energy Pulse®, Shelton Group, 2019

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*Asked of Believers who are likely to build or purchase a newly built home in next two years
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

Source: Energy Pulse®, Shelton Group, 2019
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These Believers are:

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

Source: Energy Pulse™, Shelton Group, 2019
What’s standing in the way of Believers having the healthy home they desire?

Source: Energy Pulse™, Shelton Group, 2019
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

Source: Energy Pulse™, Shelton Group, 2019
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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.

Source: Energy Pulse®, Shelton Group, 2019

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

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<th>Best terms to use</th>
<th>Okay terms to use</th>
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<td>28%</td>
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<tr>
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<td>26%</td>
<td>28%</td>
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<td>None of the above</td>
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</table>

Source: *Energy Pulse*, Shelton Group, 2019
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Believers are almost twice as likely as all others to feel comfortable using the term “healthy home”.

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**Best terms to use:**
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- Healthy home

**Okay terms to use:**
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- Carbon footprint
- HVAC
- Green home
- Connected home

**Terms to be used with caution:**
- Sustainable home
- High-performance home
- Net-zero home
- None of the above

Source: Energy Pulse™, Shelton Group, 2019

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

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- Connected home
- Sustainable home

Terms to be used with caution:
- High-performance home
- Net-zero home
- None of the above

Source: Energy Pulse™, Shelton Group, 2019

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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”.

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<td>12%</td>
</tr>
<tr>
<td>None of the above</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Energy Pulse™, Shelton Group, 2019

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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?

Source: Energy Pulse™, Shelton Group, 2019
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

Engineered for comfortable to protect

Find out more

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

Find out how

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Breathe easy with fiberglass insulation.

77% of new homes have it.

So should yours.

Find out why
Choose fiberglass insulation.

Your family deserves it.

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

Tell me more
Fiberglass insulation.

- Safe.
- Proven.
- Non-petrochemical.

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

Familiar ingredients – non-petrochemical.

Fiberglass insulation. A smart choice.
Get the facts about fiberglass

Whether you’re remodeling your home or building a new one, you heard about fiberglass insulation. It helps keep energy costs down and provides a cozy, comfortable environment in your home. It’s also a clean-burning option, which makes it especially effective in daylight or at night. It’s highly efficient and provides you with the energy savings you need.

There are three things to remember when it comes to fiberglass insulation. First, make sure you consult a professional. Second, make sure you’re installing the right product for your home. Third, make sure you’ve followed all manufacturer’s instructions. For example, if you have a window, it should be insulated with fiberglass.

Breathe easy.

The truth is, only a few types of insulation meet the highest standards for comfort, efficiency and value, and it has to be safe, nontoxic and easy to install. No more worries – fiberglass. Only you get the facts about fiberglass, you want to learn more about it. talk to your builder or installer.

Why put your trust in us? You can pronounce its ingredients.

Safe. Proven.

...and you can pronounce its ingredients.
HOME PERFORMANCE MATTERS
An initiative developed by the National Association of Home Builders
and the National Association of REALTORS®

NAHB + NAR
A high performance strategy for success in the green home marketplace

Homebuyers today are looking for healthier, more efficient homes.

And they’re willing to pay for them.

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

Builders
- National knowledge of green homes
- Inventory of high performance homes

Real Estate Professionals
- Have been told the green trend is here to stay
- The right question: Can I get a green home?

Bridge the gap. Together.

Next steps:
1. Expand your network
2. Increase your knowledge
3. Edge out the competition

How to Succeed
- Selling green homes means building relationships, earning trust in your local market.

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 boast most of their homes green certified at the national Green Building Standard has increased by more than 300% in just the past two years.

61%
of REALTORS® report that their clients are at least somewhat interested in sustainability.

How to succeed:
1. Develop and use your proficiency in the technical aspects of green homes to educate agents and the general public about what homeowners want.
2. Make sure the green homes you sell are energy efficient, affordable, and meet the requirements of the program.
3. Leverage your network. Be proactive and ensure you’re seeing the right people at the right time.

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.
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

Source: Energy Pulse™, Shelton Group, 2019
Discussion
Thank you!

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865-414-3926
Thank you!

Join the conversation - #EEBASummit2019

Save the dates for next year:

HIGH PERFORMANCE HOME SUMMIT 2020
SEPT 29 - OCT 1 \ DENVER