

RESEARCH

# UTOPIA EXCLUSIVE

## WHAT DO BUILDERS ACTUALLY INCLUDE IN HEALTHY HOMES?

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**Learn what healthy home and clean home features end up as standard, upgrades, or overlooked among builders.**

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*Photo: KB Home's Well Living Lab healthy home prototype; photo courtesy KB Home.*

**What goes in a healthy home?** If you're uncertain, you're in good company; builders answer that same question in a variety of ways.

This winter, UTOPIA surveyed 149 homebuilders and residential design professionals to learn their thoughts on healthy homes, which are generally houses with better indoor air quality and other related features. Their answers suggest that builders are certainly engaged in constructing and selling new homes that offer these benefits, but also that there's little consensus about what should be included, what should be offered as standard, and what should be presented as an option/upgrade.

In terms of future innovations for healthy homes, numerous builders mentioned technologies such as air filtration (which removes dust and allergens) and air purification (which kills germs through UV light and other methods).

But even in a pandemic, many builders say their biggest pain point in the area of designing, marketing, and selling healthy and clean homes is convincing buyers of the value of these features.

"Anything that is beyond (what is) required by code is hard to get an owner to go for," said one builder respondent.

Other buyers like the idea of buying a healthy home, but are indecisive. "Clients who are unsure, change their mind, or are not aware of the time or price (involved)" are the biggest headache for one of our respondents. Such challenges suggest that builders may need to invest in healthy homes education the same way they have been doing for years with energy efficiency.

When it comes to healthy homes, one builder said, "customers do not understand the level of quality that the product is."

Here are some key findings from UTOPIA's Healthy and Clean Homes Survey:

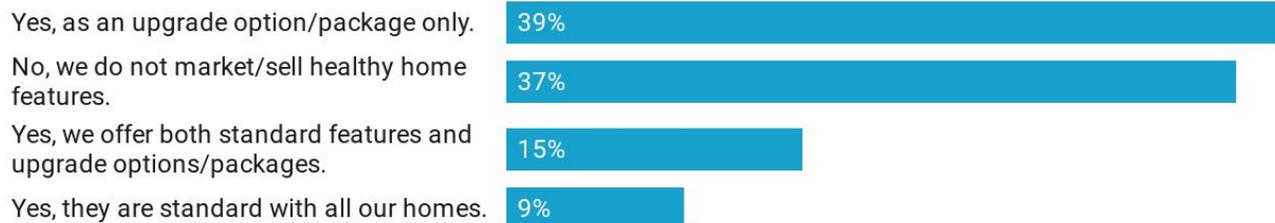
### **Who's Marketing Healthy Homes?**

The majority (63%) of builders responding to our survey do offer "healthy home" features in their new houses, but their approach differs. A small share (9%) includes

them as standard while others rely on a mix of standard and options/upgrades for serving buyers.

## Building and Selling Healthy Homes

Do you currently market/sell healthy home features/packages?

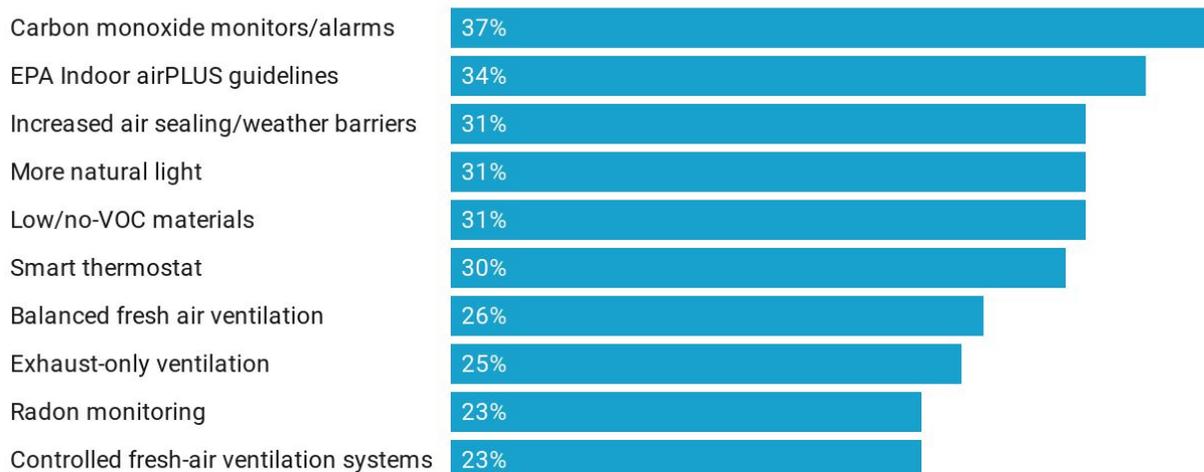


Source: UTOPIA, 2020 • Created with Datawrapper

### Cleaner Air: 10 Most Common Standard Healthy Home Features

For builders who do include healthy and clean home features as standard, carbon monoxide monitors and alarms top the list. These alarms are required in many states and cities. Second in line? EPA’s Indoor airPLUS guidelines. This voluntary program helps builders improve indoor air quality in their new homes through building science practices that reduce pollution, mold, and other contaminants.

### 10 Most Common Standard 'Healthy Home' Features



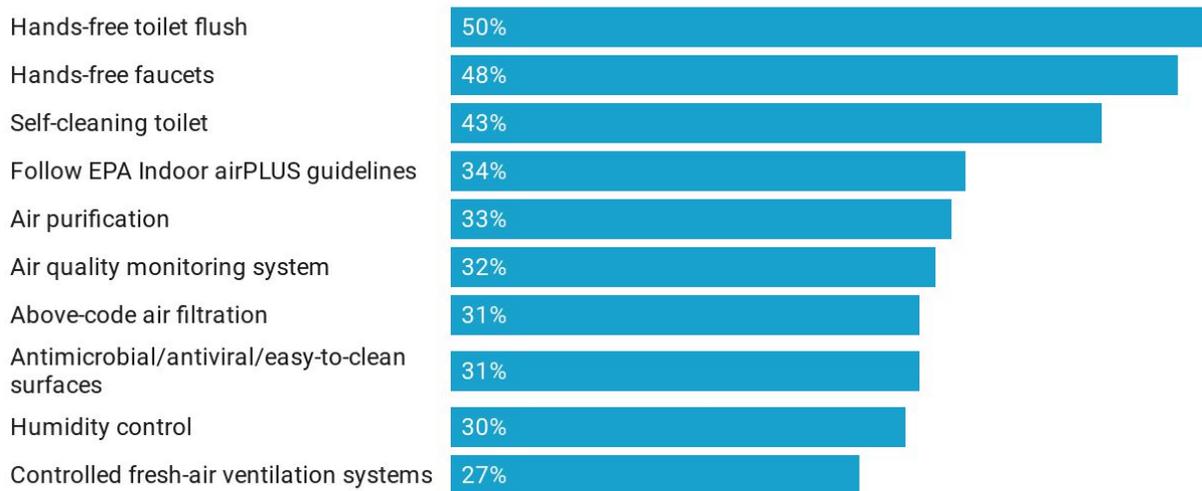
Ranking based on responses of builders who market and sell healthy homes

Source: UTOPIA, 2020 • Created with Datawrapper

## Going Touchless: 10 Most Common Healthy Home Options and Upgrades

Other builders in our survey said they provide some or all healthy home features as options and upgrades, rather than standard. Hands-free toilets and fixtures are the most commonly offered healthy home upgrades, according to our builder respondents, followed by self-cleaning toilets.

### 10 Most Common Healthy Home Options and Upgrades



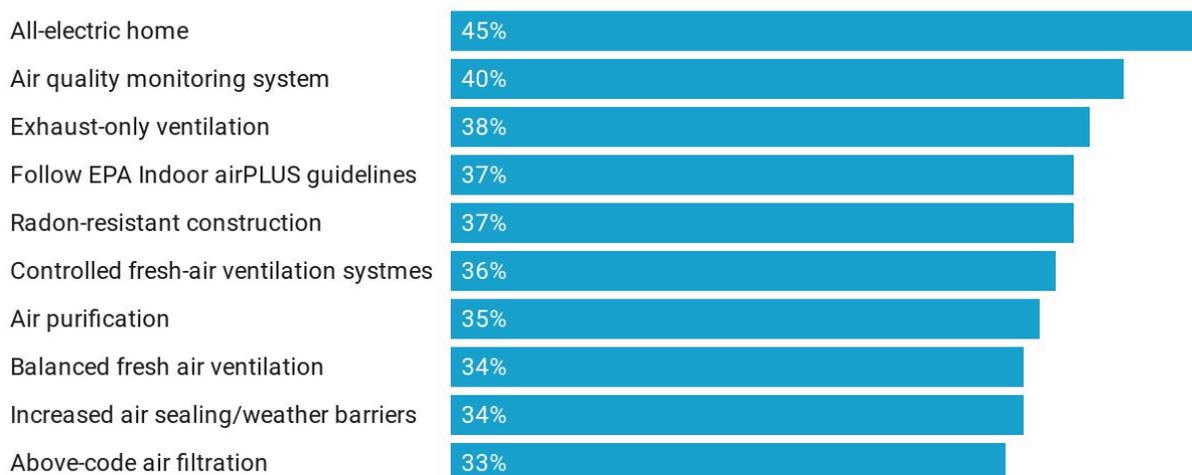
*Ranking based on responses of builders who market and sell healthy homes*

Source: Utopia, 2020 • Created with Datawrapper

## Uncommon Offerings: 10 Healthy Home Features Least Offered by Builders

While a majority of builders do offer new construction with healthy home benefits, not every feature is commonplace. Nearly half (45%) of builders who responded to our survey don't build any all-electric homes and 40% don't provide any air quality monitoring systems. If you're a builder who does include these features, you might want to compare yourself to the competition to see if you might have a marketing edge among buyers who care about fresh, clean air in their homes. If you've been reluctant to add these to your homes, you may want to do some research; the costs of improving your homes' performance may not be as high as you think.

## 10 Healthy Home Features Least Offered by Builders



*Ranking based on responses of builders who market and sell healthy homes*

Source: UTOPIA, 2020 • Created with Datawrapper

### Healthy Home and Clean Home Innovations

We asked builders and home designers to name one healthy/clean home technology or design innovation that they would like to see come to fruition. Here is a recap of the verbatim responses, grouped by theme:

#### **AIR FILTRATION + PURIFICATION**

“One complete setup that would take stale air and dust cooled or heated to an exchange to be completely filtered.”

“Use of the Reme Halo whole home in-duct air purifier.”

“Much more refined filtration system; one that comes with customized scents for buyers.”

“Safe air purification systems that do not produce ozone-depleting or other harmful particles.”

“Electrostatic filtration systems for HVAC.”

“Air and water filtration products that don’t have harmful chemicals.”

“More air filtration as standard in homes.”

“More centralized air sterilization systems.”

### ***HVAC SYSTEMS + CONTROLS***

“Better thermostats. Need to integrate ventilation, heating, cooling, and humidity.”

“Ventilation control systems that are based on true indoor air quality, driven with sensors.”

“More virus killing in air handlers.”

“Heat exchange without losing energy.”

“More air quality control and water filtration systems; they should be standard in building codes.”

“I want to see more UV lighting, electrostatic furnace filters, and ionic charge to extract dust.”

“More energy conservation and hands-free. Smart technology to control the home from anywhere.”

“Showing more interest in air-recovery systems; cold air gets heated with it coming out. More energy-efficient.”

### ***CLEAN PRODUCTS AND SURFACES***

“More companies that offer countertops with Microban (antimicrobial) technology.”

“Hands-free faucets and easy-to-clean surfaces.”

“An easy way to sanitize people entering the home.”

“More use of UVC light that disinfects spaces.”

“More antimicrobial surfaces.”

“UV lighting in the bathrooms and kitchen.”

“Whatever we can do that is hands-free: toilets, lighting, etc.”

### ***SAFETY AND SECURITY***

“Security systems at the level of affordable to new home buyers.”

### ***HOME DESIGN***

“Incorporate daylighting in all spaces.”

## **Biggest healthy home pain point for builders**

We asked our builder and home designer respondents to identify their single-biggest pain point when it comes to designing, building, marketing, and selling healthy and clean homes. Here is a recap of the verbatim responses, grouped by theme:

### ***BUILDER KNOWLEDGE***

"Constantly changing technology."

"Deciding what mechanical systems to install."

"Meeting the standard of what is considered a 'healthy home' today."

"Knowledge about the products, systems, and construction methods."

"Clear communication; more specifically, having common terminology across the industry."

"Overall lack of training and education."

"Lack of information; educating ourselves and clients."

"Good open floor plans."

### ***EDUCATING BUYERS***

"Understanding what the owner/buyer really wants; educating them on what they are getting."

"Price shoppers."

"Anything that is beyond required by code is hard to get an owner to go for."

"Getting clients to see the value so they will spend the money."

"Convince people to see the benefit of hands-free faucets and hands-free soap dispensers."

"Delayed decisions on customers' part."

### ***COST***

"The cost and complexity of HVAC air purification and ventilation."

"Giving the client everything they want within their budget."

### ***REGULATIONS + INSPECTIONS***

"Educating building inspectors and building code officials."

"Government regulations."

"Lot cost and regulations."

***LABOR SHORTAGE***

"Cost factor and lack of knowledge in subcontracting."

"Trying to find adequate subcontractors."

***SUPPLY CHAIN***

"Material supply; and the cost of materials has increased significantly."

"Sourcing healthy building materials without VOCs."