

Quarterly Topic HIRI Survey:

Prevalence, Opinion, and Use of Trendy Product Categories
3rd Quarter 2019



Table of Contents

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	Page
PROJECT OBJECTIVES AND METHODOLOGY	3
RESPONDENT BREAKOUT	4
KEY TAKEAWAYS	5 - 7
PREVALENCE, OPINION, AND USE OF TRENDY PRODUCT CATEGORIES	8 - 15
DEMOGRAPHICS	16 - 17
APPENDIX	19 - 35

Objectives and Methodology

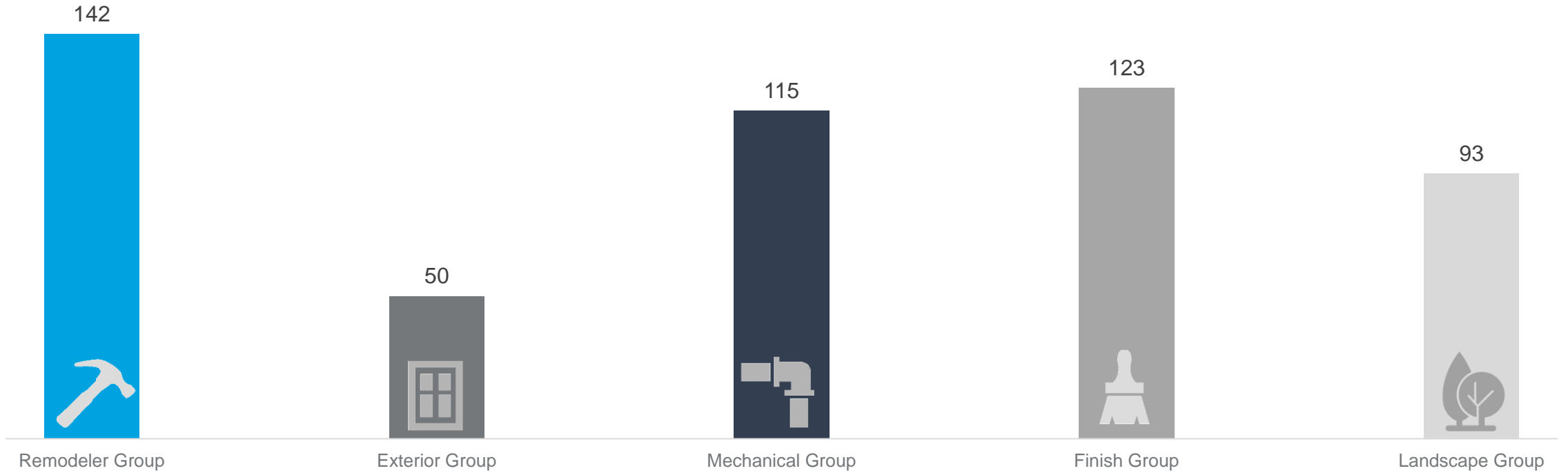
Project Objectives

- The Home Improvement Research Institute wanted to better understand data across various topics of the home improvement market on a quarterly basis.
- HIRI was interested in the prevalence, opinion, and use of trendy product categories.

Project Methodology

- The online survey was administered from August 9th to August 29th.
- The sample for the study included 523 respondents across various construction and remodeling trades within the five industry segments.
- A majority (77%) of the sample were HomeAdvisor panelists.
- Respondents must have been at least 21 years old.
- Each respondent must have done at least 50% of their work on residential projects.
- Remodelers and general contractors had to do a majority of their work in the remodeling space (at least 51%).

Respondent Breakout



Key Takeaways



Trendy Products



■ Green/ Environmentally friendly

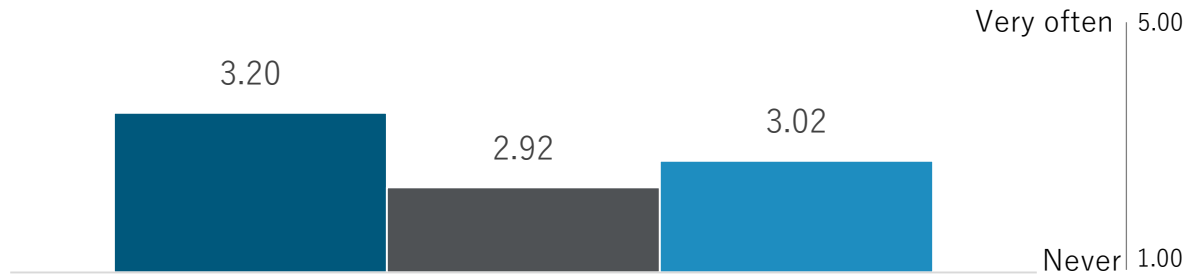


■ Smart home/ Automation



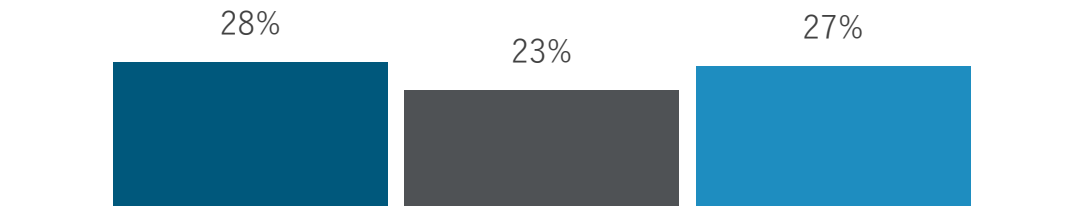
■ Aging in place/ Accessibility

Pros come across trendy products only sometimes.



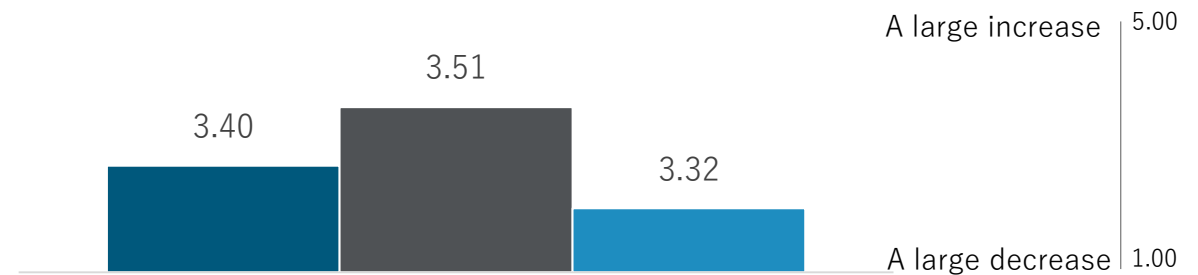
Frequency come across trendy products

Of pros who have come across a trendy product, about a quarter of their jobs involve one.



% of jobs involving trendy products

There has been a slight increase in projects for each of the 3 trendy products in the past year.



Change in the number of projects with trendy products

Energy savings is the top aided reason green/ environmentally friendly products are used.



54%

Energy savings



47%

Non-toxic materials



38%

Lower environmental emissions

Willingness to Pay More and Where Learned about Trendy Products



Green/ Environmentally friendly

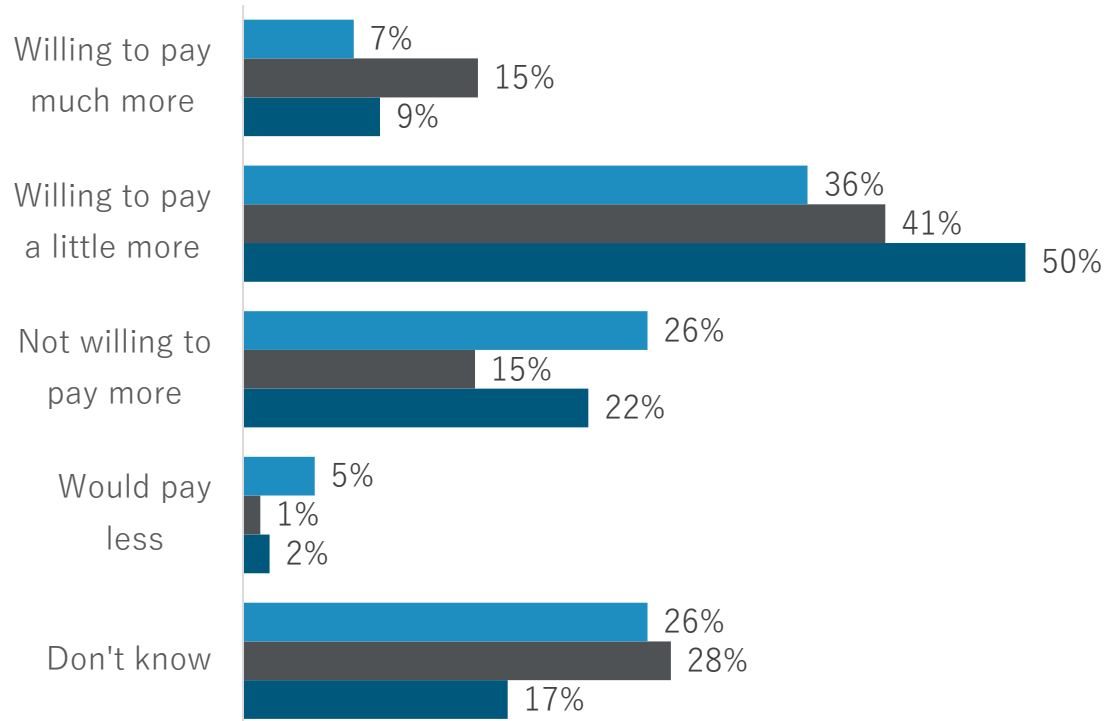


Smart home/ Automation

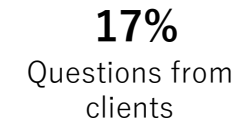
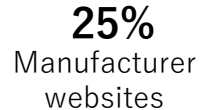
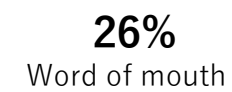
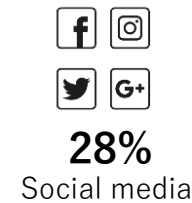
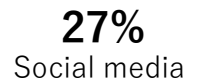
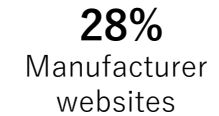
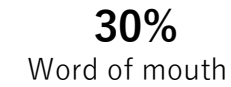


Aging in place/ Accessibility

Results are mixed as to whether clients are willing to pay more for trendy products.



Pros learn about trendy products from many different sources.



Prevalence, Opinion, and Use of Trendy Product Categories



Trendy Product Category Definitions

The following definitions were provided to the respondents:



Green/Environmentally Friendly – Goods that claim reduced, minimal, or no harm upon the environment whether in their production, use, or disposal.



Smart Home/Automation – A residence equipped with lighting, heating, and other electronic devices that can be controlled remotely by phone, voice, or computer.



Aging in place/Accessibility – Aging in place is when a person stays in their same residence as they get older, while accessibility is the design of products, devices, services, or environments for people with disabilities.

Frequency Trendy Products are Observed



How often do you come across the following types of products in the course of your work? (N=523)



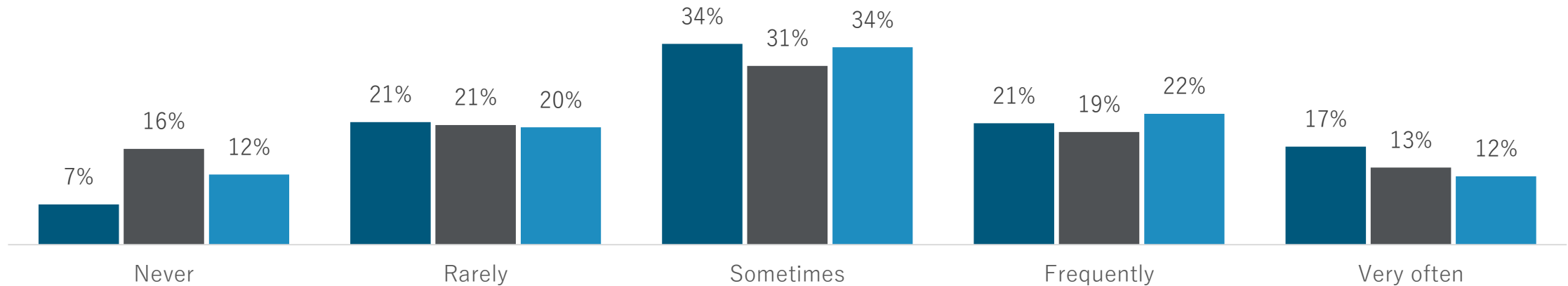
■ Green/ Environmentally friendly



■ Smart home/ Automation



■ Aging in place/ Accessibility



Percentage of Jobs with Trendy Products

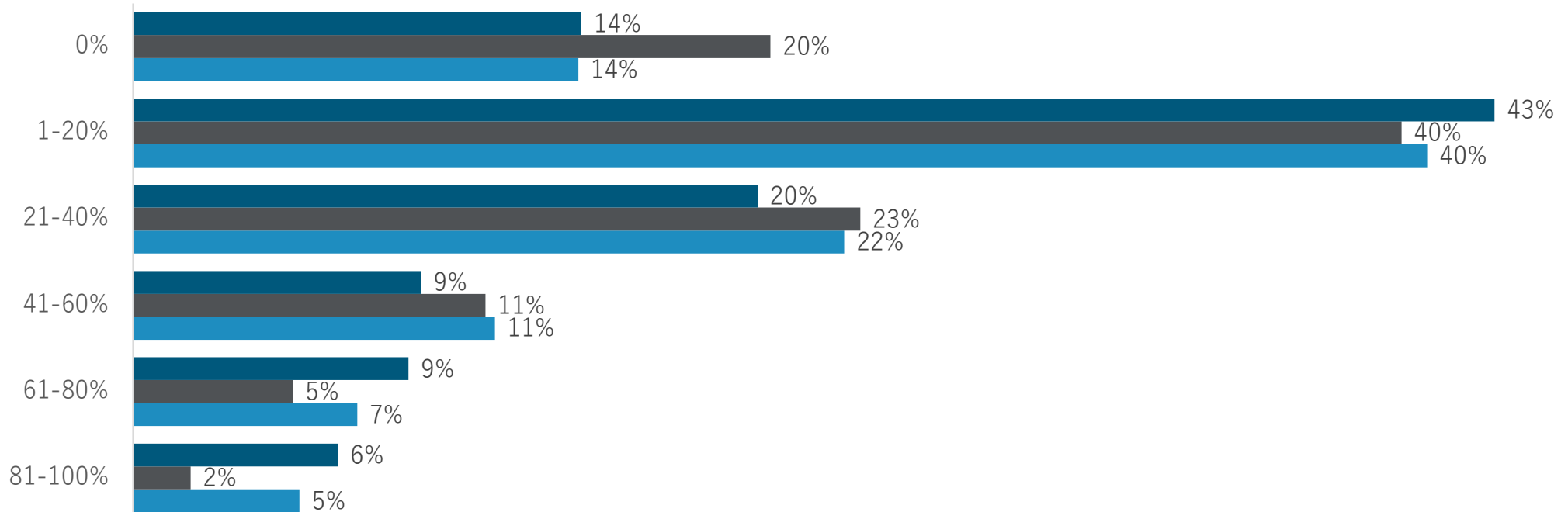
? (If have come across product for work rarely or more frequently) What percentage of your jobs involve any kind of the following products? (N=505)



■ Green/ Environmentally Friendly

■ Smart home/ automation

■ Aging in place/ accessibility



Change in Amount of Projects with Trendy Products in Past Year



(If have come across product for work rarely or more frequently) In the past 12 months, what change have you seen in the number of projects you do that include the following products?



■ Green/ Environmentally friendly (N=487)

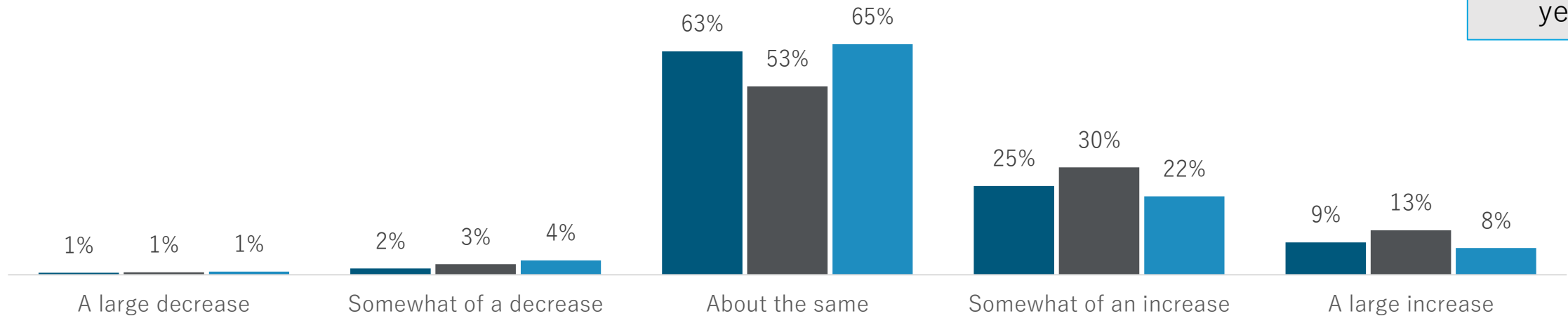


■ Smart home/ Automation (N=437)



■ Aging in place/ Accessibility (N=460)

Trendy products were seen the same amount or more often in the past year.



Top Reasons Green/Environmentally Friendly Products are Used (Aided)



(If percentage of green/environmentally friendly products is >0) What are the top reasons that green/environmentally friendly products are used? (N=419)



Creates energy savings for the home

54%

Non-toxic materials for installation and use

47%

Lower environmental emissions in installation and use

38%

Made with recycled or renewable materials

37%

Made with local materials

13%

Customer's request

1%

Willingness of Clients to Pay for Trendy Products

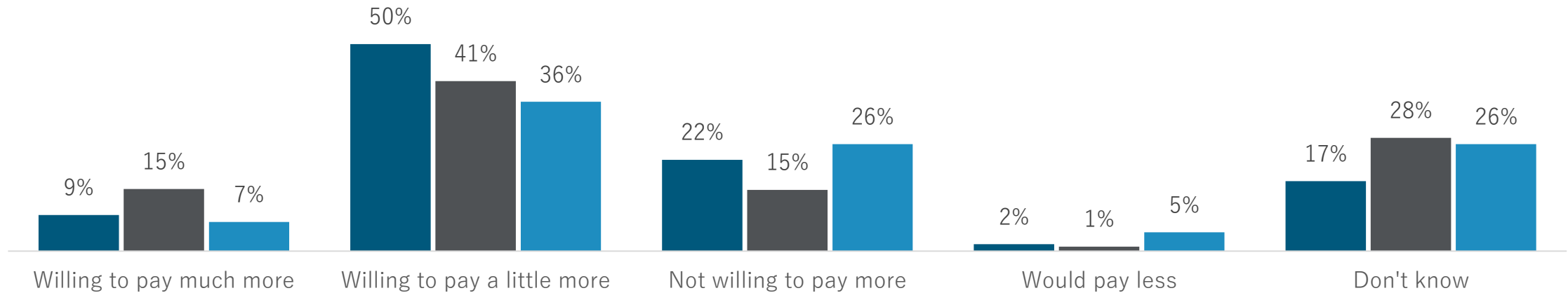


What is the willingness of your clients to pay for each of the following types of products? (N=523)



■ Green/ Environmentally friendly ■ Smart home/ Automation ■ Aging in place/ Accessibility

Roughly a quarter of pros don't know if their clients are willing to pay more.



Where Trendy Products Were Learned About (Aided)

? Where have you learned about the following types of products? (N=523)



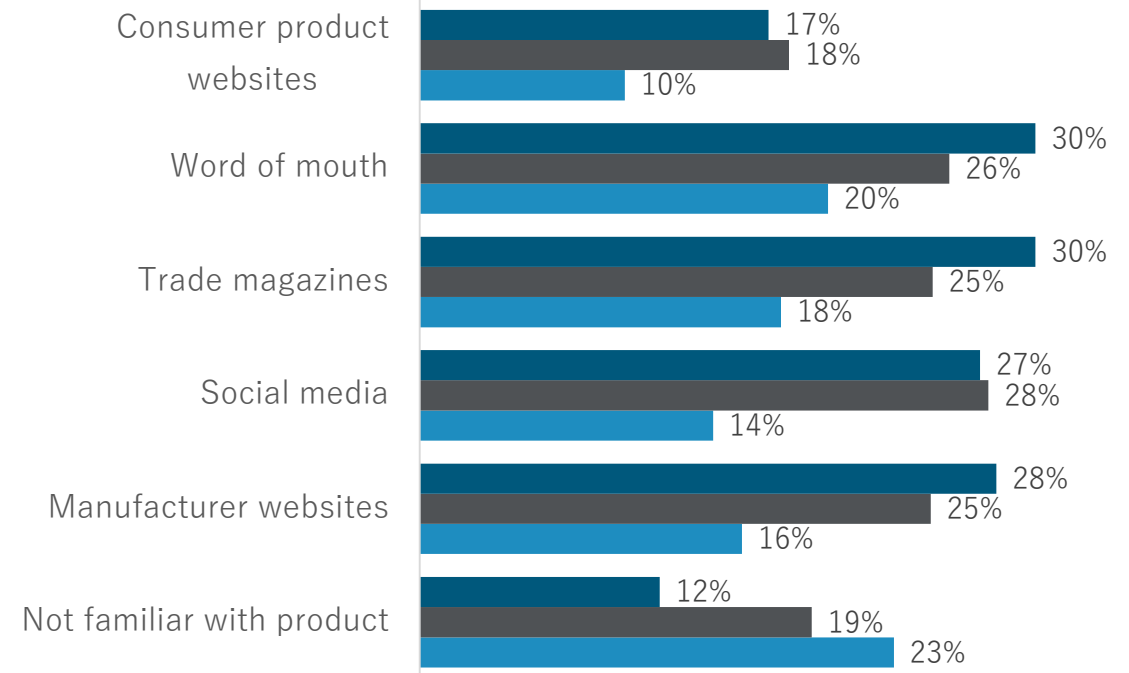
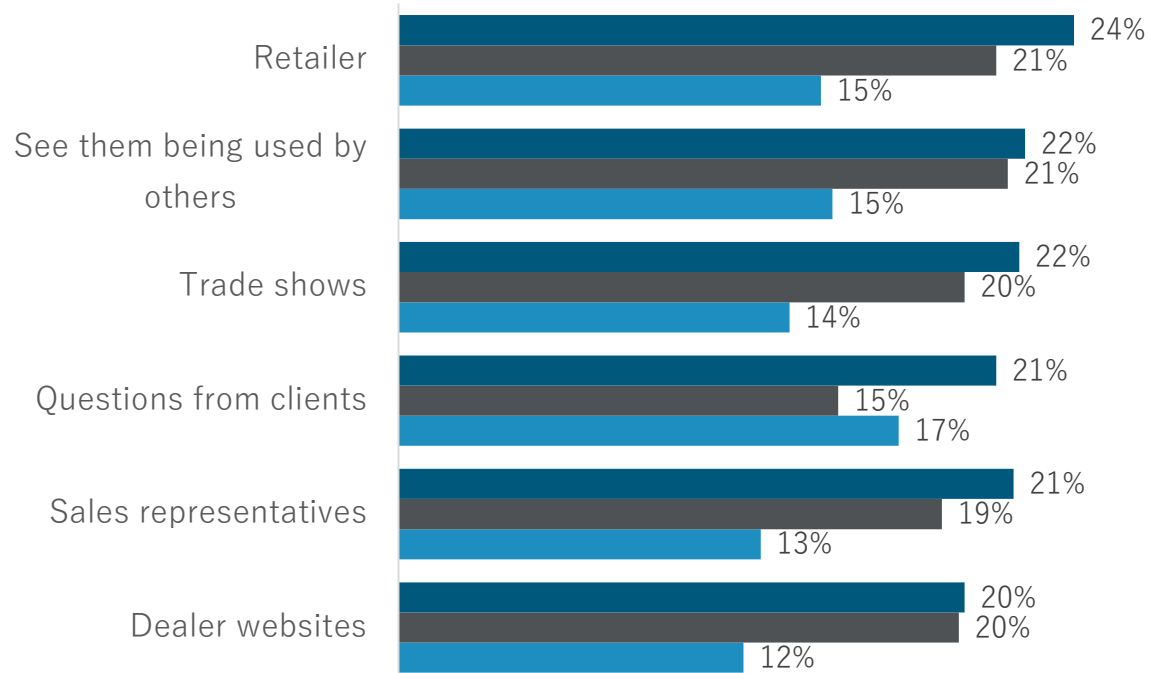
■ Green/ Environmentally Friendly



■ Smart home/ automation



■ Aging in place/ accessibility



Demographics

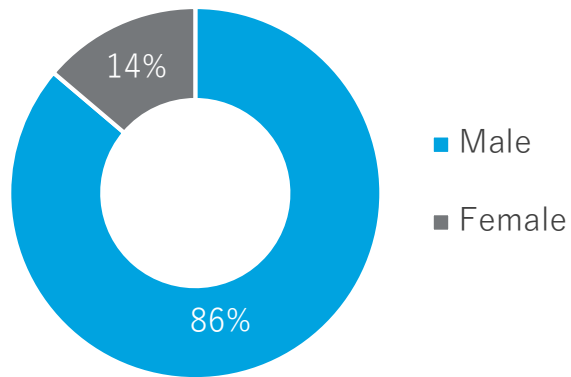


HIRI

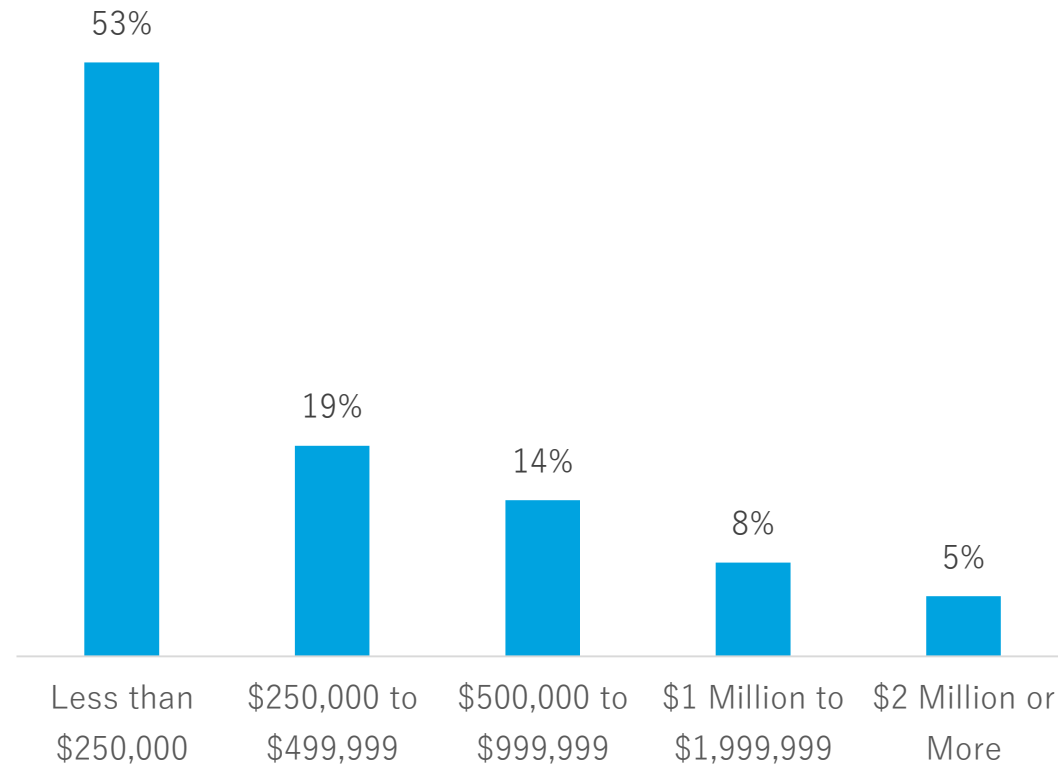
HOME IMPROVEMENT
RESEARCH INSTITUTE

Demographics

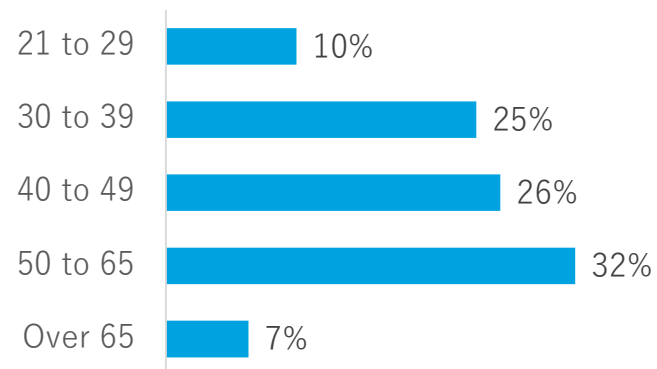
Gender



What is your company's annual revenue?

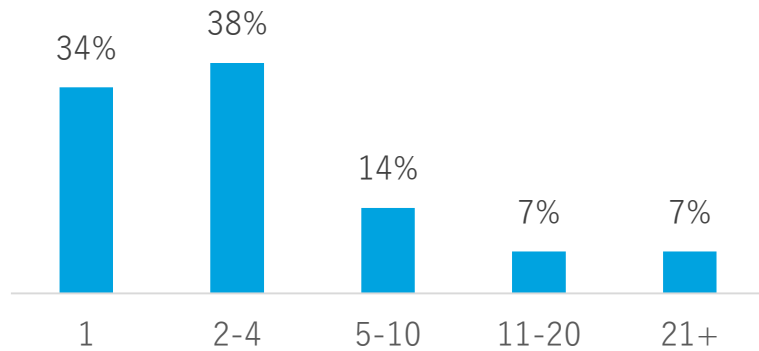


Age

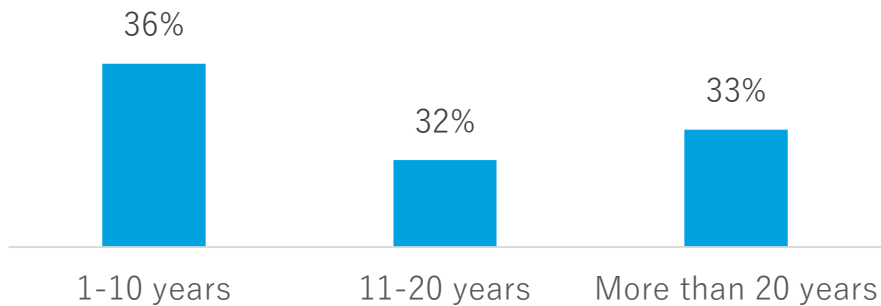


Demographics

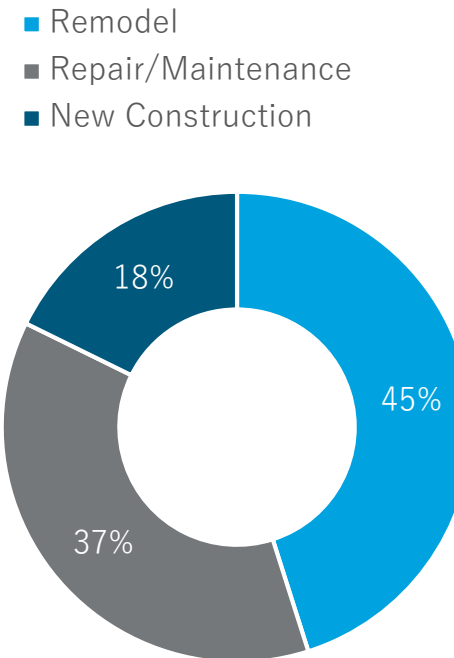
Including yourself, how many **full-time** employees does your company have on staff?



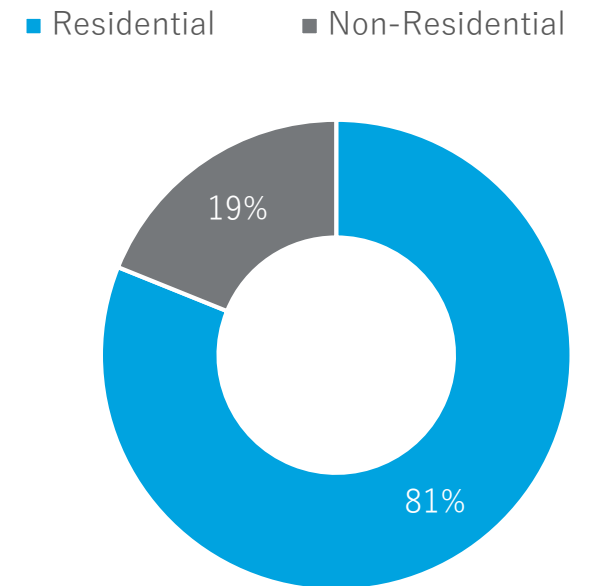
How many years have you been in your current trade?



What percent of your work is remodel/repair/new construction?



What percent of your work is residential vs. non-residential?



Appendix





How often do you come across the following types of products in the course of your work?



Green/Environmentally Friendly

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
5 - Very Often	17%	16%	18%	24%	14%	11%	21%
4 - Frequently	21%	19%	25%	18%	21%	22%	23%
3 - Sometimes	34%	34%	35%	35%	37%	36%	26%
2 - Rarely	21%	24%	14%	19%	20%	27%	20%
1 - Never	7%	6%	9%	3%	8%	5%	10%
Mean	3.2	3.16	3.29	3.41	3.13	3.05	3.26

Under the “Type of Work” heading, to be classified as “New Construction,” respondent must have stated 25% or more under “New Construction” in Q6.



How often do you come across the following types of products in the course of your work?



Smart Home/Automation

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
5 - Very Often	13%	12%	15%	12%	13%	12%	16%
4 - Frequently	19%	19%	19%	20%	21%	15%	19%
3 - Sometimes	31%	29%	35%	30%	33%	34%	23%
2 - Rarely	21%	22%	16%	23%	18%	26%	19%
1 - Never	16%	17%	15%	14%	16%	13%	22%
Mean	2.92	2.88	3.03	2.93	2.96	2.87	2.88

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



How often do you come across the following types of products in the course of your work?



Aging in Place/Accessibility

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
5 - Very Often	12%	12%	12%	16%	13%	5%	11%
4 - Frequently	22%	21%	26%	18%	25%	29%	15%
3 - Sometimes	34%	35%	30%	25%	34%	40%	38%
2 - Rarely	20%	21%	19%	28%	19%	18%	17%
1 - Never	12%	11%	14%	12%	11%	8%	19%
Mean	3.02	3.01	3.03	2.98	3.11	3.06	2.81

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) What percentage of your jobs involve any kind of following products?



Green/Environmentally Friendly

	Total (n=487)	Type of Work		Region			
		Remodel (n=355)	New Construction (n=132)	Northeast (n=96)	South (n=209)	Midwest (n=88)	West (n=94)
0%	14%	15%	12%	15%	15%	15%	11%
1-20%	43%	45%	35%	41%	43%	48%	38%
21-40%	20%	17%	27%	19%	18%	18%	25%
41-60%	9%	8%	11%	10%	10%	10%	4%
61-80%	9%	9%	8%	6%	7%	7%	17%
81-100%	6%	6%	7%	9%	7%	2%	5%
Mean	27.8	26.5	31.4	29.0	28.1	21.9	31.7

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) What percentage of your jobs involve any kind of following products?



Smart Home/Automation

	Total (n=437)	Type of Work		Region			
		Remodel (n=314)	New Construction (n=123)	Northeast (n=85)	South (n=190)	Midwest (n=81)	West (n=81)
0%	20%	20%	20%	24%	16%	22%	22%
1-20%	40%	42%	34%	42%	41%	41%	33%
21-40%	23%	20%	29%	15%	27%	22%	21%
41-60%	11%	11%	11%	12%	11%	10%	12%
61-80%	5%	6%	3%	5%	5%	4%	7%
81-100%	2%	2%	2%	2%	1%	1%	4%
Mean	22.5	22.2	23.4	20.9	23.1	19.1	26.4

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) What percentage of your jobs involve any kind of following products?



Aging in Place/Accessibility

	Total (n=460)	Type of Work		Region			
		Remodel (n=335)	New Construction (n=125)	Northeast (n=87)	South (n=203)	Midwest (n=86)	West (n=84)
0%	14%	13%	18%	13%	16%	15%	10%
1-20%	40%	42%	38%	44%	41%	34%	42%
21-40%	22%	22%	22%	18%	18%	24%	33%
41-60%	11%	11%	12%	13%	12%	9%	11%
61-80%	7%	8%	4%	8%	7%	11%	2%
81-100%	5%	5%	6%	5%	6%	7%	2%
Mean	27.1	27.3	26.5	26.4	27.0	30.9	24.4

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) In the past 12 months, what change have you seen in the number of projects you do that include the following products?



Green/Environmentally Friendly

	Total (n=487)	Type of Work		Region			
		Remodel (n=355)	New Construction (n=132)	Northeast (n=96)	South (n=209)	Midwest (n=88)	West (n=94)
5 - A large increase	9%	8%	14%	9%	10%	3%	14%
4 - Somewhat of an increase	25%	23%	31%	25%	26%	26%	21%
3 - About the same	63%	67%	54%	64%	61%	69%	62%
2 - Somewhat of a decrease	2%	2%	1%	2%	1%	1%	3%
1 - A large decrease	1%	1%	1%	0%	1%	0%	0%
Mean	3.40	3.35	3.56	3.42	3.41	3.32	3.46

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) In the past 12 months, what change have you seen in the number of projects you do that include the following products?



Smart Home/Automation

	Total (n=437)	Type of Work		Region			
		Remodel (n=314)	New Construction (n=123)	Northeast (n=85)	South (n=190)	Midwest (n=81)	West (n=81)
5 - A large increase	13%	13%	11%	17%	10%	11%	16%
4 - Somewhat of an increase	30%	29%	35%	28%	34%	26%	30%
3 - About the same	53%	55%	48%	52%	52%	61%	51%
2 - Somewhat of a decrease	3%	2%	5%	4%	3%	1%	4%
1 - A large decrease	1%	0%	2%	0%	1%	1%	0%
Mean	3.51	3.53	3.48	3.58	3.48	3.44	3.58

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If have come across product for work rarely or more frequently) In the past 12 months, what change have you seen in the number of projects you do that include the following products?



Aging in Place/Accessibility

	Total (n=460)	Type of Work		Region			
		Remodel (n=335)	New Construction (n=125)	Northeast (n=87)	South (n=203)	Midwest (n=86)	West (n=84)
5 - A large increase	8%	8%	6%	13%	7%	5%	7%
4 - Somewhat of an increase	22%	22%	24%	16%	23%	22%	27%
3 - About the same	65%	67%	62%	66%	65%	70%	62%
2 - Somewhat of a decrease	4%	3%	7%	6%	4%	4%	4%
1 - A large decrease	1%	1%	1%	0%	2%	0%	0%
Mean	3.32	3.33	3.28	3.36	3.29	3.28	3.38

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



(If percentage of green/environmentally friendly products is >0) What are the top reasons that green/environmentally friendly products are used?



Green/Environmentally Friendly

	Total (n=419)	Type of Work		Region			
		Remodel (n=303)	New Construction (n=116)	Northeast (n=82)	South (n=178)	Midwest (n=75)	West (n=84)
Creates energy savings for the home	54%	56%	49%	60%	52%	61%	48%
Non-toxic materials for installation and use	47%	48%	44%	37%	46%	51%	56%
Lower environmental emissions in installation and use	38%	35%	46%	37%	35%	45%	38%
Made with recycled or renewable materials	37%	36%	40%	38%	35%	44%	32%
Made with local materials	13%	13%	16%	21%	9%	15%	14%
Customer's request	1%	1%	0%	1%	0%	1%	1%

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



What is the willingness of your clients to pay for each of the following types of products?



Green/Environmentally Friendly

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
4 - Willing to pay much more	9%	7%	14%	10%	7%	8%	14%
3 - Willing to pay a little more	50%	51%	48%	46%	54%	46%	51%
2 - Not willing to pay more	22%	24%	18%	26%	20%	26%	19%
1 - Would pay less	2%	1%	3%	0%	3%	2%	1%
Don't know	17%	17%	17%	18%	17%	18%	15%
Mean	2.80	2.76	2.88	2.80	2.77	2.72	2.91

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



What is the willingness of your clients to pay for each of the following types of products?



Smart Home/Automation

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
4 - Willing to pay much more	15%	14%	17%	11%	16%	17%	15%
3 - Willing to pay a little more	41%	43%	37%	36%	42%	44%	42%
2 - Not willing to pay more	15%	14%	17%	21%	15%	12%	12%
1 - Would pay less	1%	1%	1%	0%	2%	2%	0%
Don't know	28%	27%	29%	31%	26%	25%	31%
Mean	2.97	2.96	2.99	2.85	2.96	3.01	3.06

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



What is the willingness of your clients to pay for each of the following types of products?



Aging in Place/Accessibility

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
4 - Willing to pay much more	7%	7%	8%	7%	9%	7%	3%
3 - Willing to pay a little more	36%	37%	34%	30%	33%	43%	43%
2 - Not willing to pay more	26%	28%	22%	28%	26%	25%	25%
1 - Would pay less	5%	3%	8%	4%	6%	3%	4%
Don't know	26%	25%	28%	30%	26%	23%	25%
Mean	2.62	2.63	2.60	2.58	2.62	2.68	2.60

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



Where have you learned about the following types of products?



Green/Environmentally Friendly

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
Trade magazines	30%	31%	27%	23%	31%	33%	32%
Word of mouth	30%	30%	29%	33%	25%	31%	37%
Manufacturer websites	28%	28%	30%	25%	27%	31%	31%
Social media	27%	26%	32%	28%	28%	27%	25%
Retailer	24%	24%	21%	24%	22%	27%	23%
See them being used by others	22%	23%	19%	21%	22%	19%	25%
Trade shows	22%	23%	19%	20%	22%	25%	19%
Sales representatives	21%	20%	25%	18%	19%	25%	27%
Questions from clients	21%	22%	17%	18%	19%	22%	28%
Dealer websites	20%	19%	21%	15%	22%	14%	24%
Consumer product websites	17%	18%	16%	15%	16%	14%	24%
Not familiar with product	12%	12%	10%	8%	12%	13%	13%

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



Where have you learned about the following types of products?



Smart Home/Automation

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
Social media	28%	28%	28%	28%	32%	26%	20%
Word of mouth	26%	26%	26%	27%	27%	23%	25%
Trade magazines	25%	26%	23%	19%	26%	33%	22%
Manufacturer websites	25%	26%	23%	20%	26%	31%	22%
See them being used by others	21%	22%	20%	26%	21%	20%	18%
Retailer	21%	21%	21%	23%	21%	20%	19%
Trade shows	20%	21%	17%	19%	19%	23%	18%
Dealer websites	20%	19%	21%	13%	22%	17%	23%
Sales representatives	19%	18%	21%	13%	20%	20%	21%
Consumer product websites	18%	18%	17%	17%	19%	18%	16%
Questions from clients	15%	16%	14%	17%	13%	17%	17%
Not familiar with product	19%	19%	21%	19%	15%	19%	27%

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.



Where have you learned about the following types of products?



Aging in Place/Accessibility

	Total (n=523)	Type of Work		Region			
		Remodel (n=378)	New Construction (n=145)	Northeast (n=99)	South (n=227)	Midwest (n=93)	West (n=104)
Word of mouth	20%	21%	18%	19%	22%	18%	17%
Trade magazines	18%	19%	15%	15%	18%	20%	16%
Questions from clients	17%	18%	15%	14%	12%	28%	22%
Manufacturer websites	16%	16%	15%	13%	15%	18%	18%
See them being used by others	15%	16%	14%	16%	17%	15%	11%
Retailer	15%	16%	11%	16%	12%	22%	13%
Social media	14%	14%	15%	14%	16%	14%	12%
Trade shows	14%	14%	12%	13%	13%	17%	13%
Sales representatives	13%	13%	12%	13%	14%	9%	13%
Dealer websites	12%	11%	15%	11%	13%	9%	14%
Consumer product websites	10%	9%	11%	9%	8%	11%	13%
Not familiar with product	23%	21%	28%	20%	23%	20%	30%

Under the "Type of Work" heading, to be classified as "New Construction," respondent must have stated 25% or more under "New Construction" in Q6.

You may contact HIRI for any further questions or information:

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