

# What Is Home?

Why security is joining comfort  
as one of the strongest drivers  
for home upgrades

November 2022

# Introduction & Methodology

Our annual **Energy Pulse**<sup>®</sup> study is Shelton Group's exploration of consumer perceptions and behaviors regarding energy and the environment. Our 16th study contains a mix of new topics and tracking questions that we ask every year.

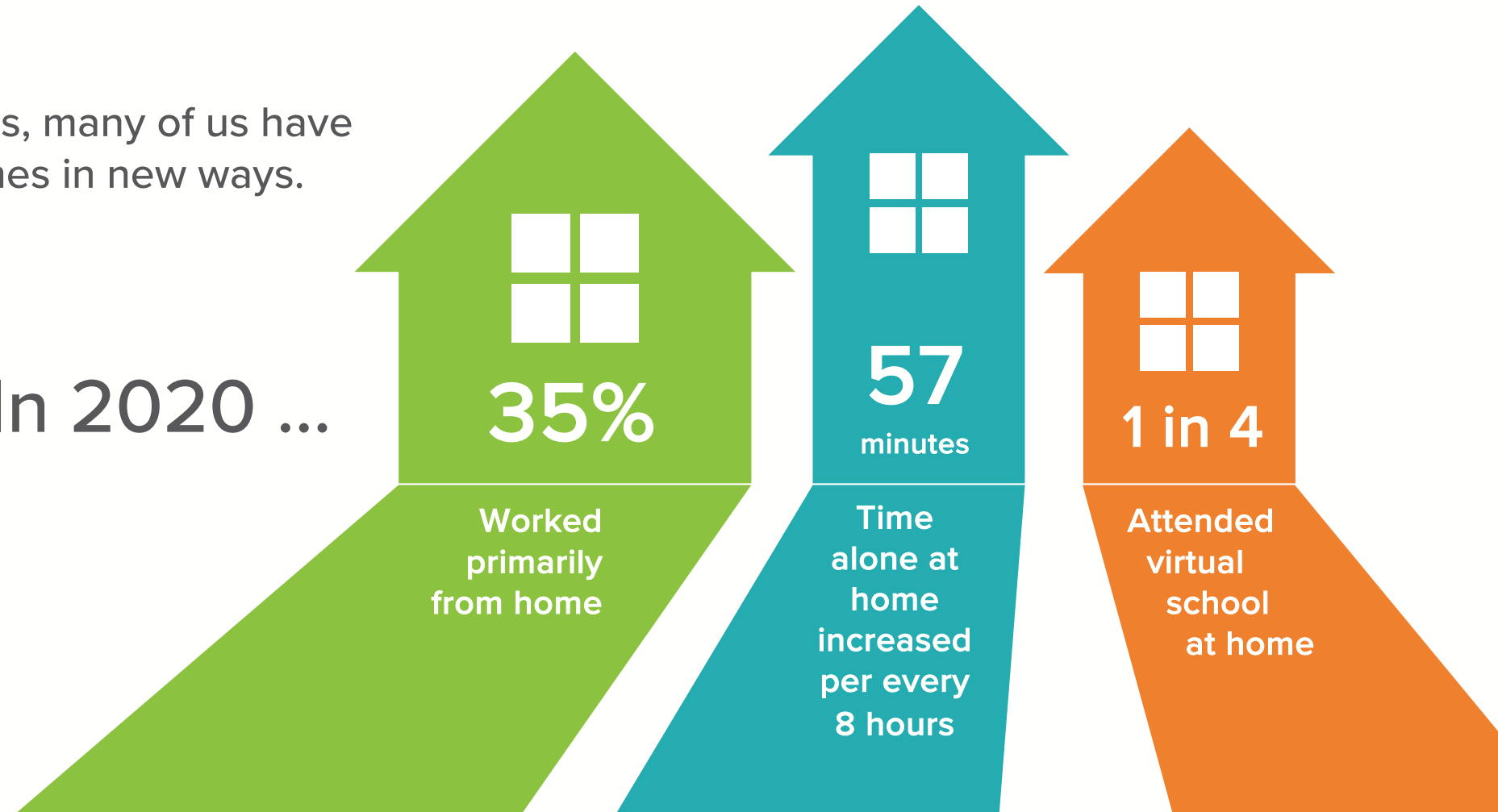
- We fielded the **online survey** in December 2021, surveying a total of 2,022 U.S. respondents.
- **Stratified sampling** mirrors the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 2.2%.



# Life in the Pandemic

Over the last few years, many of us have been living in our homes in new ways.

In 2020 ...



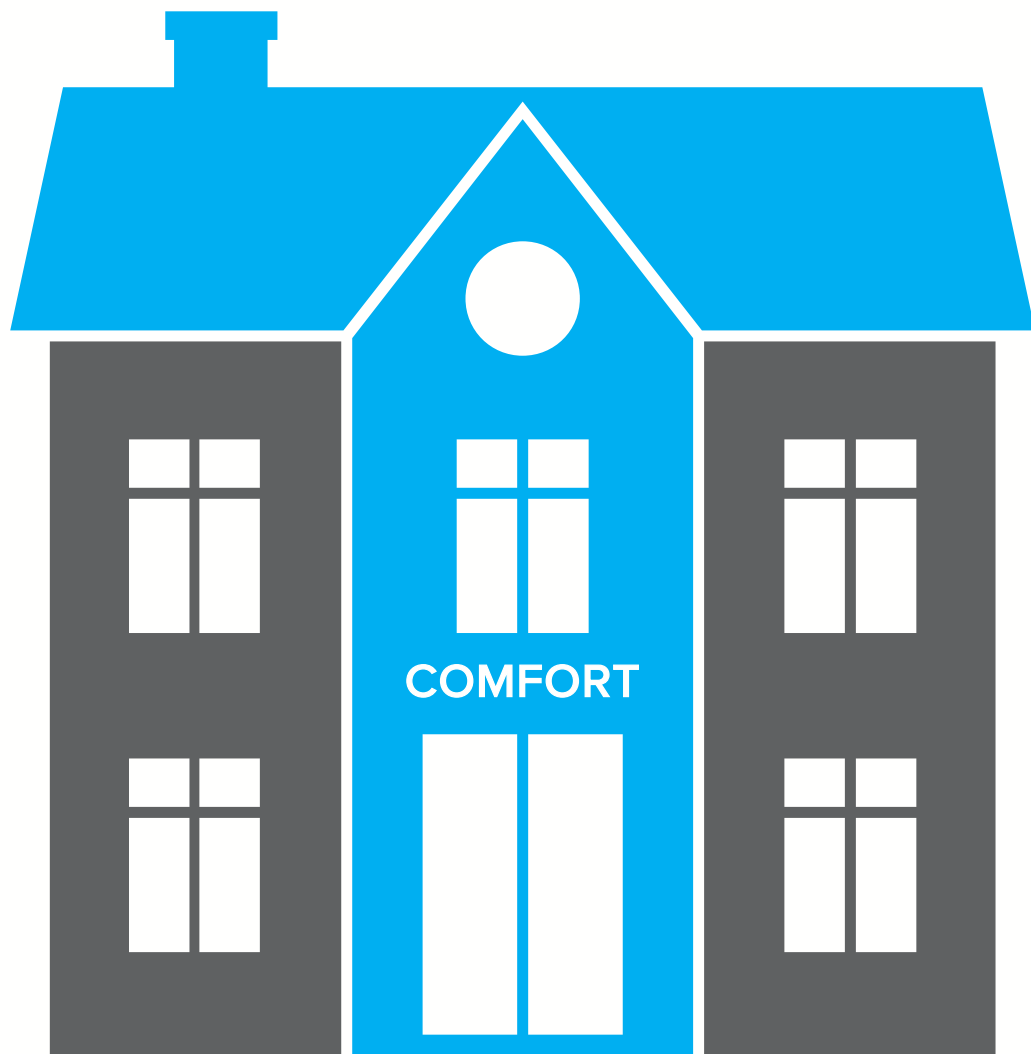


According to our data, how we **use** our homes isn't the only big change.



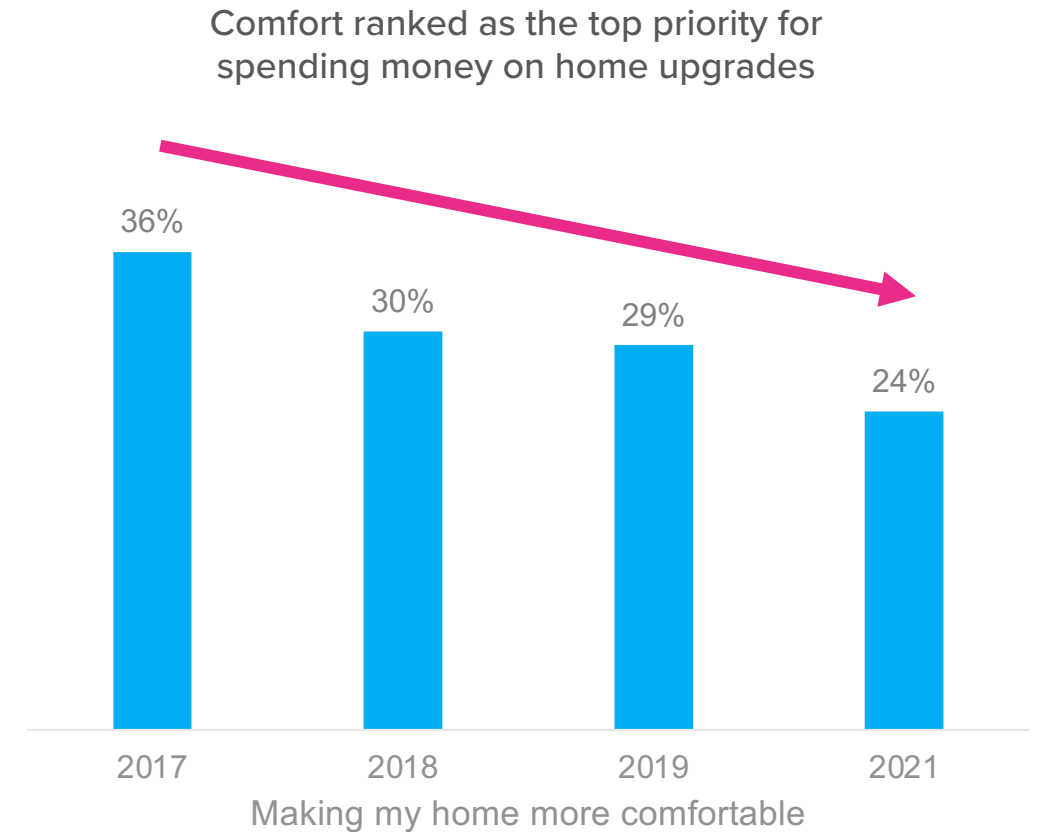
There is also a big shift in how we **feel** about our homes.





We've always  
prioritized **comfort**  
in our homes.

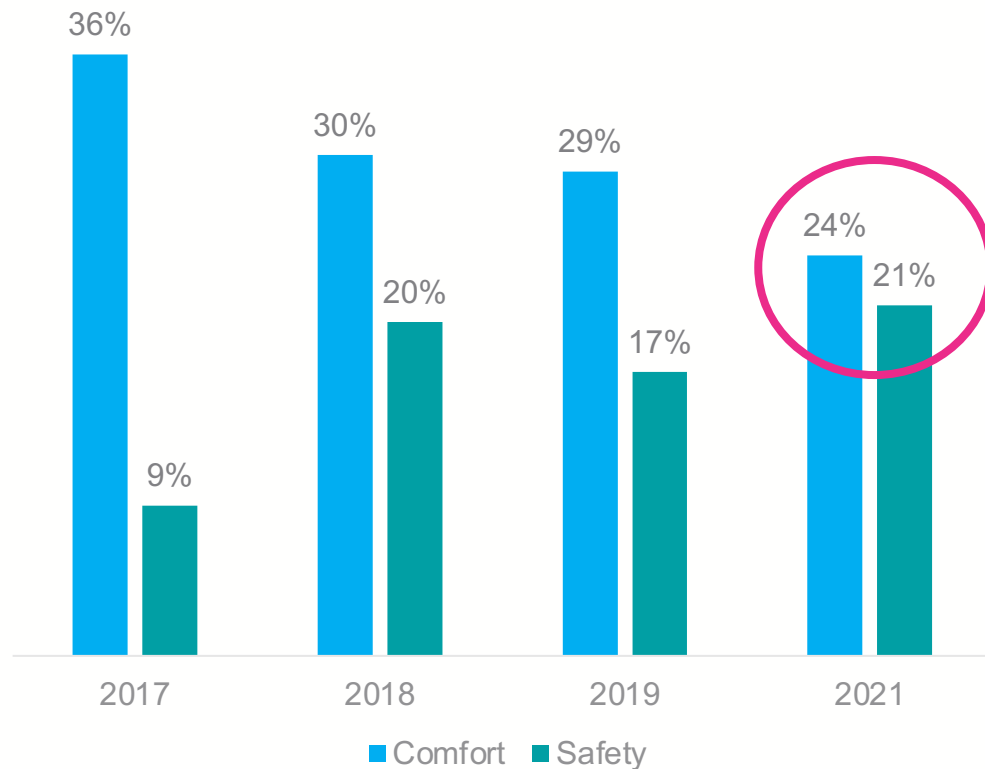
For many years, Americans' top priority for spending money on their homes was to **“make my home more comfortable.”** But that number has been steadily decreasing. So, what else has become a priority?





Now, we're  
prioritizing **safety**  
**and security**, too.

Comfort and safety ranked as top priority for spending money on home upgrades



**“Making my home safer”** is now almost as high a priority as comfort when it comes to deciding how to spend money.



This isn't a simple case of  
**safety** *replacing* **comfort**.

During the pandemic, these  
two desires have become  
increasingly intertwined.

What's most important for making a house into a home?

When it comes to the much more emotional benefit of “making a house a home,” **safety and security** and **comfort** are tied.

**77%**  
say  
**Safety & Security**

**77%**  
say  
**Comfort**



# HOUSE

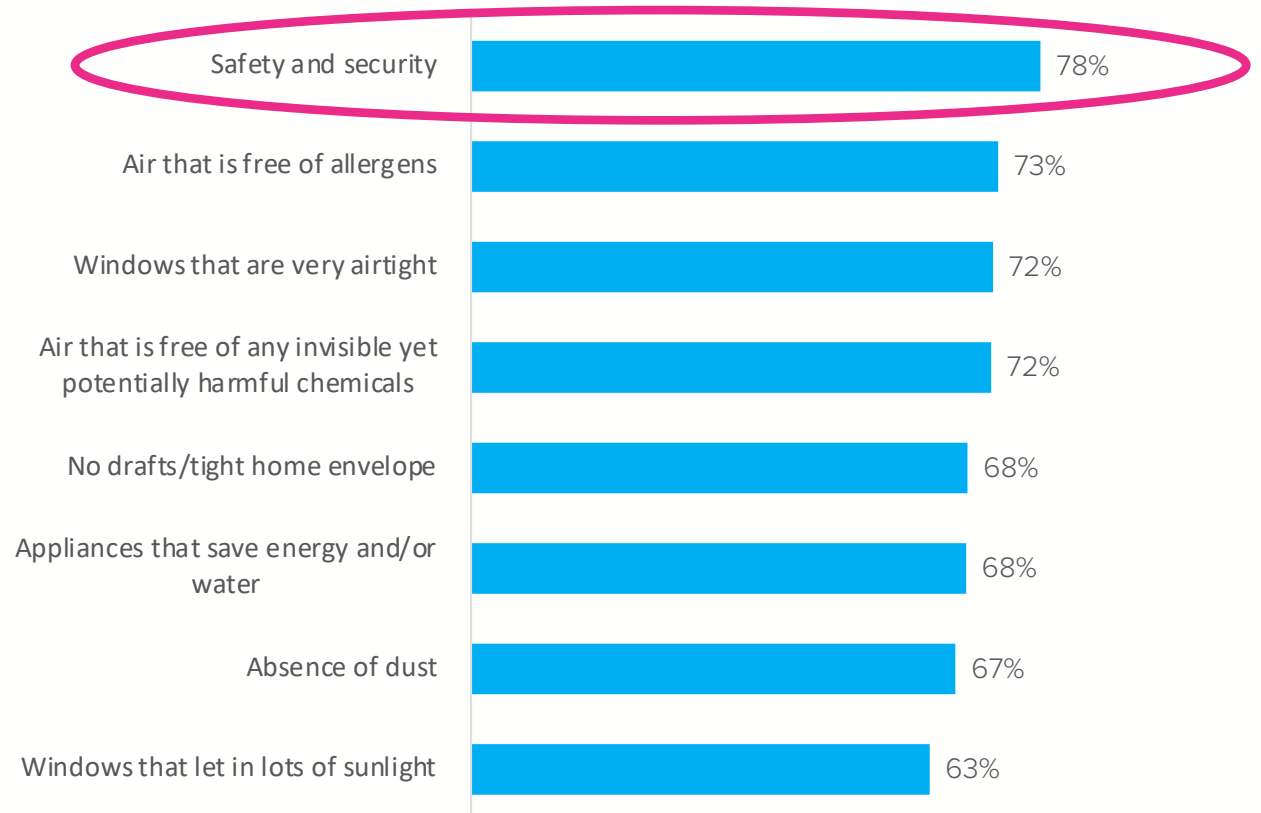
# HOME

Together, **comfort** and **safety**  
help make a **house** a **home**.

And it seems we can't have one  
without the other. Because the #1  
thing people say creates comfort  
at home ...

... is **safety and security.**

Percentage who rated extremely/very important to creating a feeling of comfort in the home environment



Source: Energy Pulse® 2021

n=2,022



This brings us  
to the last piece  
of the **puzzle**.

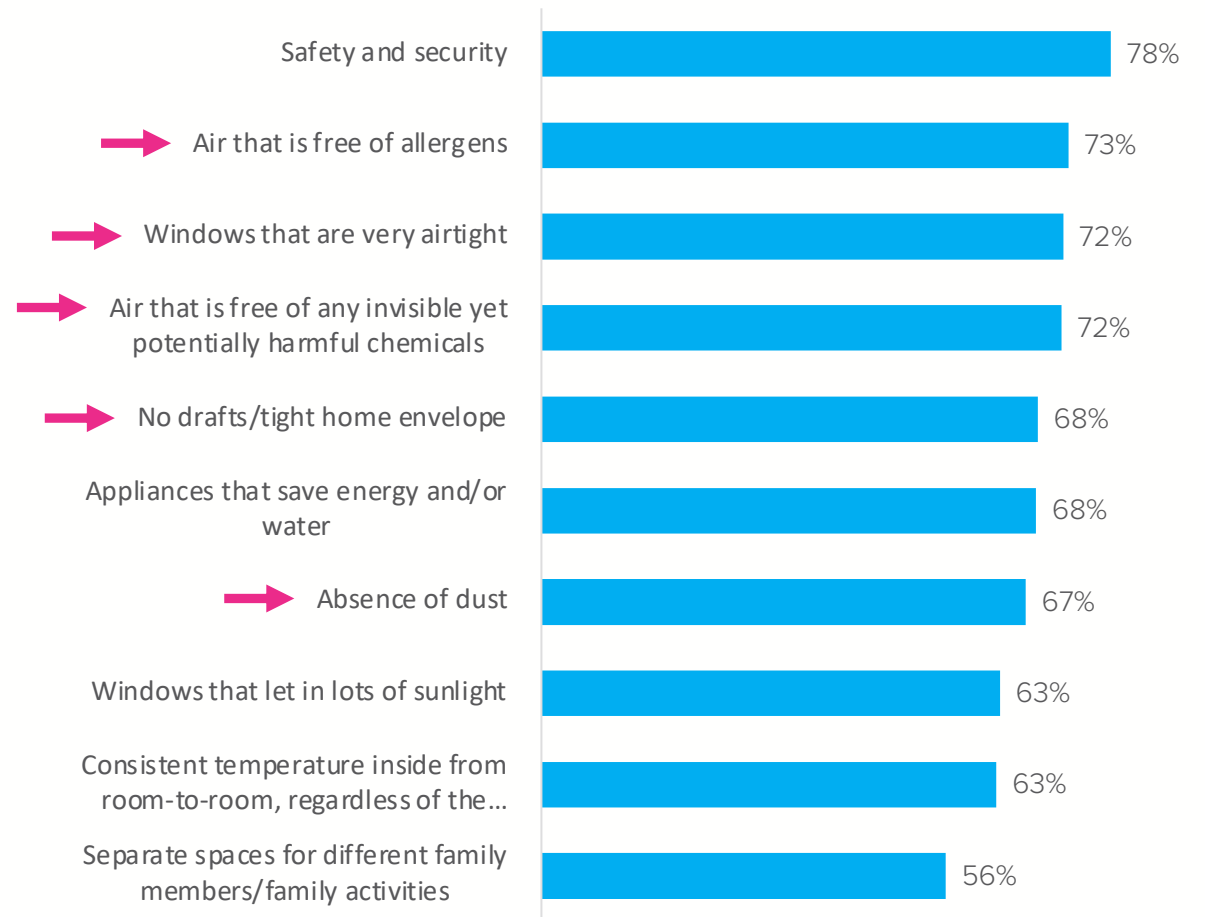
As you would expect during a pandemic, we've all been thinking a lot about the air we breathe.

And that, too, has changed how we think about **comfort**.

How do you create comfort, other than safety and security?

People say it's by regulating the **air** inside their home.

Percentage who rated extremely/very important to creating a feeling of comfort in the home environment





And when we dug into how to create a safe and secure home, “a space free of chemicals or allergens” came out on top.

71%

vs.

58%

say “a space free of chemicals or allergens” is extremely/very important.

say “security systems.”

**So, the meaning of home has changed** — from “the place where I want to feel physically comfortable” to “my main source of safety and security, right down to the air I’m breathing.”

When the very air we breathed turned against us, indoor air quality became an essential component of safety and security in the home.

60%

are at least moderately concerned about indoor air quality.

37%

are more concerned about indoor air quality now vs. before the pandemic.

Source: *Energy Pulse*® 2021

n=2,022

Concern about indoor air quality is evident in many people's focus on healthy cleaning products — their thinking being that these products release fewer chemicals that can be breathed in.

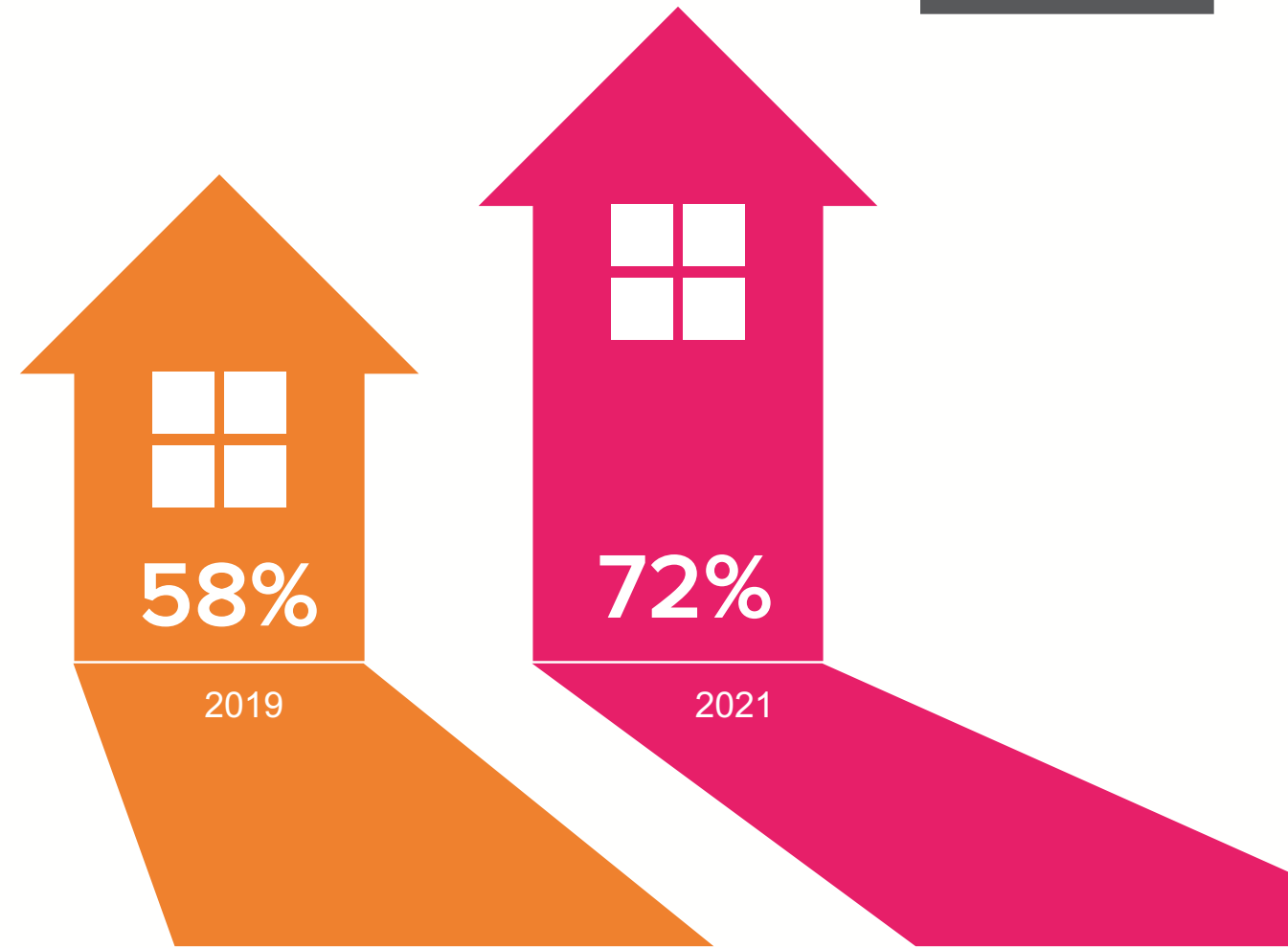
# 72%

believe that “making a home healthy is really about choosing the right cleaning products,” up from 58% in 2019.

Source: *Energy Pulse*® 2021

n=2,022

And more people than ever believe their **home's health** is directly related to their **personal health**.



Percentage who believe their home's health is directly related to their personal health

Source: Energy Pulse® 2021

How much does each statement describe your feelings about creating and living in a healthy home? % "Describes my feelings perfectly/well"

n=2,022



A true home now exists at the intersection of comfort, safety/security and health.

We see this as an emerging need for **“haven-making.”**

This is not the first time in history that a pandemic has driven us to seek a safe haven in our homes. Nor is it the first time a pandemic has shaped trends in home design and construction, like the inclusion of vestibules or greater focus on outdoor living spaces.

*“People are looking for their home to be a safe space, to be more functional than it was,” Donald Ruthroff, principal at Dahlin Group Architecture in California, says. That increased functionality starts right at the front door: The pandemic led to a resurgence in the popularity of foyers and vestibules at the main entryway. Homeowners were looking for a way to separate delivery workers and other temporary visitors from the main living area, and a separate space at the main entrance was the answer. In fact, Ruthroff says, vestibules first became popular architectural features during the Spanish flu pandemic a century ago.”*



What does this mean for *businesses* in the residential built environment?

**Demonstrate and communicate** how your products or services enable “haven-making” at home.

This will be easier than ever now that you know how comfort, safety/security and health are intertwined.

Your ideal message lives at the intersection of these three drivers





Explain how your products and services work together to create an envelope of safety, from the right floor layout to the resiliency of the home to the very air your customers breathe.



The general public's increased level of scrutiny and understanding of the home's effects on personal health opens the door for you to connect more of your products' features and benefits to this theme.



Go deeper in your messaging around comfort, think outside the home-security-system box for safety/security messaging, and integrate health messaging across more of your communications.

Demonstrate and communicate how your company uses its sphere of influence to create havens outside the home.

This is a way to closely connect your *company* narrative and ESG reporting with your *product/service* messaging.





Report what your company is doing to create healthy, safe and secure workplaces for your employees.



Take action in the communities in which you operate, and share how you're helping improve safety, security and health outside your walls.



Be transparent about how you're reducing your impact on the planet — the home we all share.



Now is also a good time to lead with the people-focused, social aspects of your story and follow with the environmental.

*Dig deeper into the trends we've seen over the past few years [here](#).*

# Are you comfortable telling your story?

Reach out to Shelton Group for support. We'll help you position your products, services and company to appeal to the new way we're all thinking about home.

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*Gain a sustainable advantage.*