Green Features –

What Home Buyers Really Want

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National Survey

of Recent & Prospective Home Buyers
Buyers Tilted in Favor of Single-family Detached Homes


- Single-family Detached: 77%
- Townhouse: 13%
- Multifamily unit: 4%
- Manufactured Home: 4%
Majority of Buyers Prefer the Suburbs

Suburbs: 64%

Rural: 24%

Central City: 11%

Important Preferences to Keep in Mind...

- **86% Prefer Kitchen/Dining Room Open (Completely or Partially)**
- **64% Want 2 or 2 ½ Bathrooms**
- **49% Want 3 Bedrooms**
- **70% Prefer Washer/Dryer on the 1st floor**
- **No Basement 44%**
- **67% Prefer 9’+ Ceiling in 1st Floor**
- **48% Prefer a 2-car Garage**

Top 5 Technology Features Buyers Would Like to Have
(% of Respondents)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Currently Have</th>
<th>Would Like to Have</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security cameras</td>
<td>21%</td>
<td>46%</td>
</tr>
<tr>
<td>Video doorbell</td>
<td>12%</td>
<td>45%</td>
</tr>
<tr>
<td>Programmable thermostat</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Wireless home security system</td>
<td>18%</td>
<td>40%</td>
</tr>
<tr>
<td>Lighting control system</td>
<td>11%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Home Buyers Rated 175 Features as:

- **Essential**: unlikely to buy a home without feature
- **Desirable**: seriously influenced to buy home if included
- **Indifferent**: would not influence purchase decision
- **Do Not Want**: not likely to buy a home with feature

The Most Wanted List
(\% of Respondents Rating Essential/Desirable)


- Laundry room: 54% Essential/Must have, 37% Desirable, 91% Total
- ENERGY STAR windows: 38% Essential/Must have, 51% Desirable, 89% Total
- Patio: 34% Essential/Must have, 53% Desirable, 87% Total
- ENERGY STAR appliances: 40% Essential/Must have, 46% Desirable, 86% Total
- Ceiling fan: 45% Essential/Must have, 40% Desirable, 85% Total
- Garage storage: 36% Essential/Must have, 49% Desirable, 85% Total
- Exterior lighting: 36% Essential/Must have, 49% Desirable, 85% Total
- Walk-in pantry: 32% Essential/Must have, 51% Desirable, 83% Total
- Hardwood flooring: 31% Essential/Must have, 52% Desirable, 83% Total
- Double kitchen sink: 42% Essential/Must have, 39% Desirable, 81% Total
- ENERGY STAR - whole home: 28% Essential/Must have, 53% Desirable, 81% Total
## Over 60% of Buyers Want These GREEN Features

(\% of Respondents Rating Essential/Desirable)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Essential/Must have</th>
<th>Desirable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR rated windows</td>
<td>38%</td>
<td>51%</td>
<td>89%</td>
</tr>
<tr>
<td>ENERGY STAR rated appliances</td>
<td>40%</td>
<td>46%</td>
<td>86%</td>
</tr>
<tr>
<td>ENERGY STAR rating for whole home</td>
<td>28%</td>
<td>53%</td>
<td>81%</td>
</tr>
<tr>
<td>Efficient lighting (less energy than traditional bulbs)</td>
<td>28%</td>
<td>49%</td>
<td>77%</td>
</tr>
<tr>
<td>Triple-pane insulating glass windows</td>
<td>22%</td>
<td>55%</td>
<td>77%</td>
</tr>
<tr>
<td>Insulation higher than required by code</td>
<td>21%</td>
<td>52%</td>
<td>73%</td>
</tr>
<tr>
<td>Water-conserving toilets (flush volume &lt; federal standards)</td>
<td>19%</td>
<td>44%</td>
<td>63%</td>
</tr>
<tr>
<td>Low-e insulating glass windows</td>
<td>17%</td>
<td>45%</td>
<td>62%</td>
</tr>
<tr>
<td>Tankless water heater</td>
<td>18%</td>
<td>43%</td>
<td>61%</td>
</tr>
</tbody>
</table>

50% to 59% of Buyers Want These **GREEN** Features
(% of Respondents Rating Essential/Desirable)

- **Solar water heating/electric system**: 14% Essential, 45% Desirable, 59%
- **Home dehumidification system**: 16% Essential, 42% Desirable, 58%
- **Whole house mechanical ventilation**: 16% Essential, 41% Desirable, 57%
- **Low VOC materials (paint, flooring, adhesives)**: 15% Essential, 42% Desirable, 57%
- **Electronic air cleaner**: 14% Essential, 43% Desirable, 57%
- **“Net Zero” home (produces as much energy as it consumes)**: 11% Essential, 42% Desirable, 53%
- **Reduced flow bathroom faucets**: 14% Essential, 36% Desirable, 50%

Fewer than Half of Buyers Want These **GREEN** Features
(% of Respondents Rating Essential/Desirable)

- **Reduced flow shower heads**: 14% Essential, 35% Desirable, 49% Total
- **Geothermal heating/cooling**: 10% Essential, 39% Desirable, 49% Total
- **Components built from sustainably harvested lumber**: 10% Essential, 36% Desirable, 46% Total
- **Components made from locally produced materials**: 9% Essential, 36% Desirable, 45% Total
- **Gas filled (Argon or Krypton) insulating glass**: 12% Essential, 31% Desirable, 43% Total
- **Home components made of recycled materials**: 9% Essential, 33% Desirable, 42% Total
- **Barrels/cisterns collecting rainwater for irrigation, toilets, etc.**: 9% Essential, 31% Desirable, 40% Total
- **Roof-mounted, electricity generating wind turbine**: 8% Essential, 28% Desirable, 36% Total
- **Prefabricated components (wall panels, trusses, etc.)**: 7% Essential, 22% Desirable, 29% Total
- **Roof partially or completely covered by plants**: 7% Essential, 17% Desirable, 24% Total

Most Buyers Choose the **Green Alternative** When Given the Option (% of Respondents)

- Features and finishes made of more expensive materials that last longer: **74%**
- Features and finishes made of materials that cost less but need to be replaced more often: **26%**
- Low maintenance landscaping with plants that grow in the local climate with minimal watering, weeding or mowing: **65%**
- Conventional landscaping with a traditional lawn, trees, shrubs, etc.: **35%**

Most Buyers Choose the Green Alternative When Given the Option (% of Respondents)

- Home oriented to make efficient use of the sun’s energy for heating and cooling: 63%
- Home oriented to optimize the attractiveness of the home as viewed from the street: 37%
- A heating and cooling system designed to meet your current needs efficiently: 63%
- A heating and cooling system larger than currently needed with some excess capacity for possible future needs: 37%

Most Buyers Choose the **Green Alternative** When Given the Option (% of Respondents)

- Narrower sidewalks and streets with more green space: 54%
- Wider sidewalks and streets: 46%
- Home on a continuous, interconnected street with more efficient traffic flow: 33%
- Home on a cul de sac or other street design with limited traffic flow: 67%

Top Green Certification Programs Known by Most Buyers
(% of Respondents Aware of Program)


- ENERGY STAR: 81%
- LEED for Homes: 24%
- HERS (Home Energy Rating System): 22%
- WaterSense: 21%
- NGBS (National Green Building Standard): 15%
- Indoor AirPLUS: 14%
- ZERH (Zero Energy Ready Homes): 13%
- Green Globes: 11%
- Living Building Challenge: 10%
- PHIUS (Passive House Institute US): 8%
Buyers’ Concern about Their Home’s Impact on the Environment (% of Respondents)

- 14% Want env.-friendly home, & WOULD pay more for it
- 18% Not concerned about the environment
- 68% Concerned/want env.-friendly home, but WOULD NOT pay more

Additional Amount Buyers Would Pay for Home to Save $1,000/year in Utilities
(% of Respondents)

- Less than $1,000: 17%
- $1,000 to $9,999: 46%
- $10,000 or more: 37%

Median: $5,000
Average: $8,728

Additional Amount Buyers Would Pay for Home to Save $1,000/year in Utilities by Home Price ($)

- Less than $150,000: $5,000 (Median), $6,653 (Average)
- $150,000 to $249,999: $5,000 (Median), $8,004 (Average)
- $250,000 to $499,999: $5,000 (Median), $10,067 (Average)
- $500,000 or more: $5,000 (Median), $10,560 (Average)

How Much Will Buyers Pay For Green Certifications? ($)

Certification that home is above-code for energy efficiency
- Average: $2,625
- Median: $1,000

Certification that home is above-code for water efficiency
- Average: $1,900
- Median: $500

Certification that home is above-code for indoor environmental quality
- Average: $1,876
- Median: $500

Comprehensive, holistic green standard that encompasses all of the above plus general efficient use of resources and env.-friendly lot design
- Average: $2,972
- Median: $500

Thank you!

Questions?
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