

Build Eco-Friendly

Home Renovation Study

From reducing air pollution to using renewable energy as a power source, U.S. homeowners have an overwhelming desire for more information, more choices and more action across the industry for eco-friendly construction materials and practices according to the 2021 Home Renovation Study from 3M.

Released: October 2021

2021 3M Home Renovation Study

Executive Summary

3M conducted a survey of over 1,500 homeowners who had engaged in recent home renovation projects to learn whether they considered the environment as part of their home renovation projects during the pandemic. Here's what they said.

1. Homeowners rely on construction professionals.

- 71% of homeowners surveyed used professional contractors to complete their home renovation projects entirely or partially.
- 42% of homeowners that relied on advice from other individuals stated that contractors influenced them the most.

2. Homeowners desire more eco-friendly choices for construction materials.

- 45% of homeowners surveyed chose eco-friendly construction materials for their last renovation project and 70% plan to choose eco-friendly construction materials for their next project.
- 71% feel broader society will move toward eco-friendly construction materials.

3. Homeowners are influenced by their friends and family.

Individuals have a voice for change.

- 66% of homeowners surveyed feel they are doing enough for the environment, but 53% feel their friends and families are not doing enough.
- 52% of homeowners surveyed stated they would be more active in considering eco-friendly materials if their friends and family were doing so.

4. Homeowners acknowledge the industry for the choices they do offer,

but they still want more product choices, more product information and more action across the industry for eco-friendly construction materials and practices. More than half of those surveyed feel that every product should have an eco-friendly component.

- 56% of homeowners surveyed feel every product should have an eco-friendly component.
- When asked about what would make an eco-friendly choice easier, homeowners responded with the following: price being equal, product comparisons for eco-friendly options compared to standard alternatives, and products being easily and readily available.

5. Recycling and waste reduction are top-of-mind

for what homeowners want the industry to prioritize as well as what they prioritize for themselves as being most impactful to the environment.

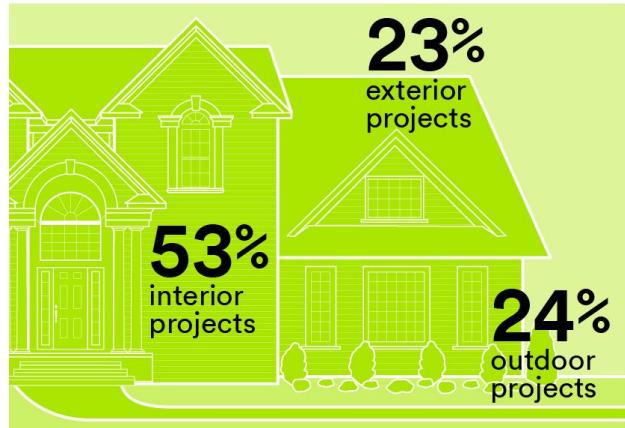
- Recycling and waste reduction are #1 on the list of activities homeowners believe impact the environment most.
- 39% of homeowners believe the construction industry should prioritize the reduction of waste for a sustainable future.

Home renovations during the pandemic

It wasn't long after sheltering in place that people uncovered a silver lining to being at home more often. With new routines and habits, as well as unexpected down time, homeowners tackled interior, exterior and outdoor home renovation projects at an unexpected rate. This even caught industry analysts by surprise and caused them to reverse their projections from decline to growth.

Types of projects

- 53% were interior projects (e.g., kitchen, bath, basement)
- 23% were exterior projects (e.g., roofing, siding, windows)
- 24% were outdoor projects (e.g., decks, pools, additions)



3M wanted to know whether homeowners prioritized the environment and sustainability in their home renovation projects during the pandemic. 3M sought to better understand homeowner preferences for eco-friendly construction materials and whether they feel the industry is meeting their needs and expectations.

The short answer to what 3M learned was that homeowners want more! More information, more choices and even more actions across the industry toward eco-friendly construction materials and practices. A majority of homeowners (74%) agree that swapping in eco-friendly construction materials would at least make a somewhat strong impact to the environment. Interestingly, homeowners feel they are doing their part, but they also feel their friends and family could do more.

Bright spots emerged in homeowner perspectives on the industry with eco-friendly product offerings available in many home renovation categories, but the perception by homeowners is that still more can be done.

DIYers still lean on professionals

Even with extra time on their hands, 71% of homeowners surveyed relied partly or entirely on a professional contractor for their renovation projects. During the COVID-19 pandemic construction was deemed essential, and homeowners demonstrated how they personally value the industry by how much they leaned on their pros for home renovation projects.

- 46% used professional contractors exclusively to complete their project(s).
- 25% engaged in a mix of “do-it-yourself” and the use of a professional.
- 29% exclusively engaged in a “do-it-yourself” approach for their project(s).

46%

used contractors exclusively
to complete their renovation



Nearly half of homeowners surveyed chose eco-friendly materials for their latest renovation

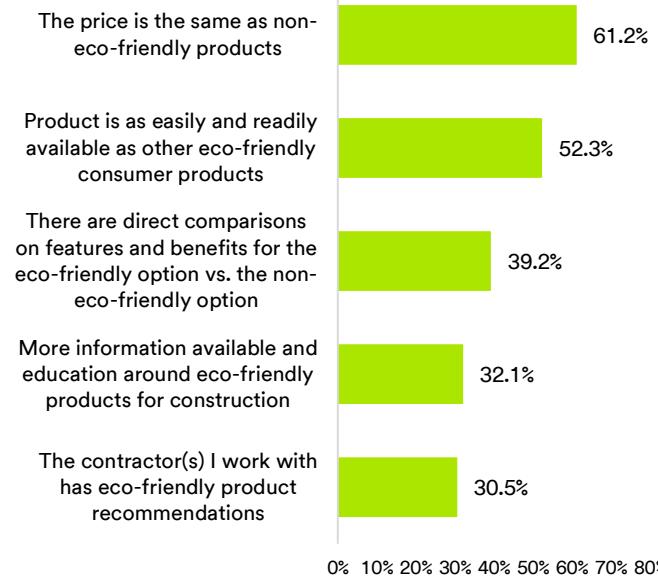
Not only did 45% of homeowners surveyed purchase eco-friendly materials for their latest renovation, but 70% plan to do so next time. 90% of homeowners between 18 and 40 years old said they would consider eco-friendly materials. 42% of millennials said they always seek out eco-friendly products.

Aside from equal pricing, the top reasons homeowners cited that would make selecting an eco-friendly product easier was if the products were more readily available and the industry helped homeowners understand what sets their eco-friendly products apart from alternative products.

What would make selecting an eco-friendly construction product easier in the future?

- The price is the same as non-eco-friendly products.
- The product is as easily and readily available as other eco-friendly consumer products.
- There are direct comparisons on features and benefits for the eco-friendly option vs. the standard alternative.

What would make buying an eco-friendly product easier?

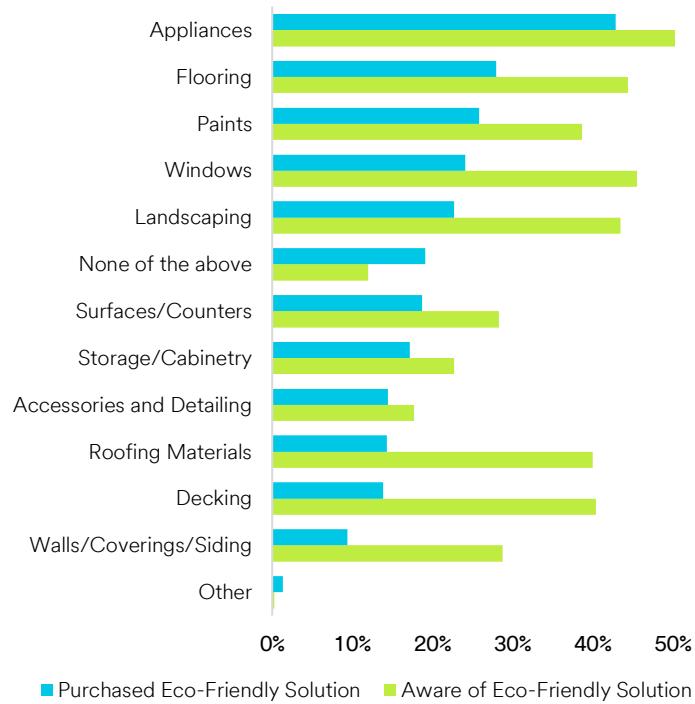


0% 10% 20% 30% 40% 50% 60% 70% 80%

The top three product types purchased – flooring, appliances, and paints – were also among the top five categories that homeowners had the highest awareness of as offering eco-friendly products.

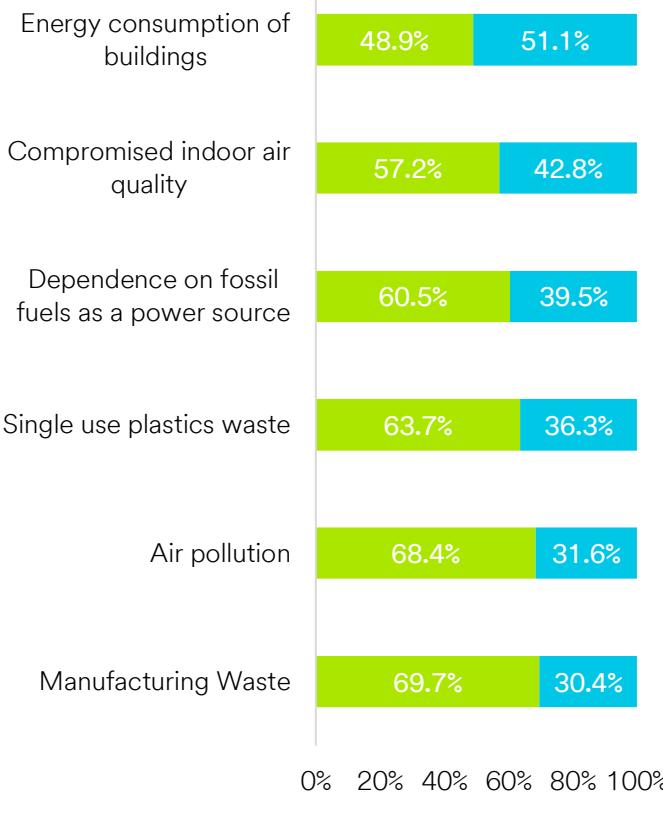
Homeowner awareness of eco-friendly offerings falls into these top categories:

1. Appliances 54%
2. Windows 46%
3. Flooring, Landscaping 44%
4. Roofing, Decking 40%
5. Paints 39%



Homeowners have high expectations for the construction industry

When asked whether the industry is contributing to specific issues or helping to solve them, energy consumption of buildings was the only area in which homeowners felt the industry was making more progress than adding to the problem. Air quality, dependence on fossil fuels, single-use plastics, and manufacturing waste were categories where homeowners responded that they feel the industry is adding to the problem more than contributing to the solution.



More than half of homeowners surveyed believe all products should have an eco-friendly component.

56% of homeowners surveyed stated that they believe all products should have an eco-friendly component, while 64% said they value sustainability and want eco-friendly products to be just as available as their non-eco counterparts.

Recycling and waste reduction is top-of-mind for homeowners

On a personal level, homeowners stated in the survey that they believe most in the act of recycling and reducing waste as the top activity that they believe will impact the environment.

1. Recycling/reducing waste
2. Reducing/eliminating use of single-use plastics
3. Using renewable energy as a power source
4. Reducing air pollution
5. Selecting energy efficient products

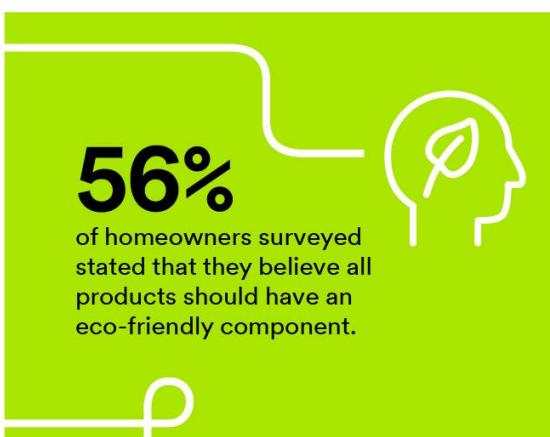
The homeowners surveyed also believe the industry should take action in the following areas to create a sustainable future. It's no surprise that recycling and reducing waste is also the action homeowners feel will have the greatest impact on the environment.

1. Recycling and waste reduction
2. Selecting energy efficient products
3. Using renewable energy as a power source
4. Choosing materials with recycled content or plant-based materials
5. Offering more eco-friendly products

44% of homeowners surveyed feel the industry is doing enough to protect the environment.

Individuals have an influential voice

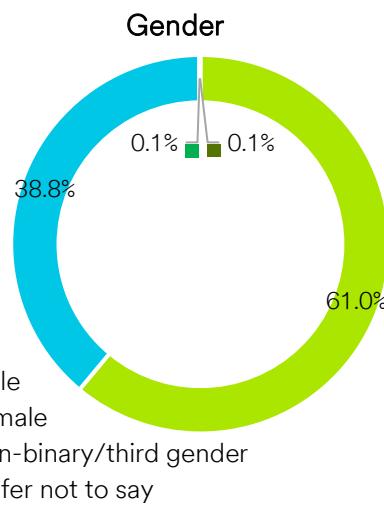
Not only do homeowners find eco-friendly products appealing, but according to the survey they are taking the advice of others to influence their purchases. 52% of homeowners stated they would want to be more active in considering eco-friendly materials if their friends and family were doing so. What homeowners say and do can impact their circle of influence. If the industry can continue to offer more products in this category and help homeowners understand the benefits of the eco-friendly elements included, consider the ripple effect it could have on the adoption of eco-friendly products.



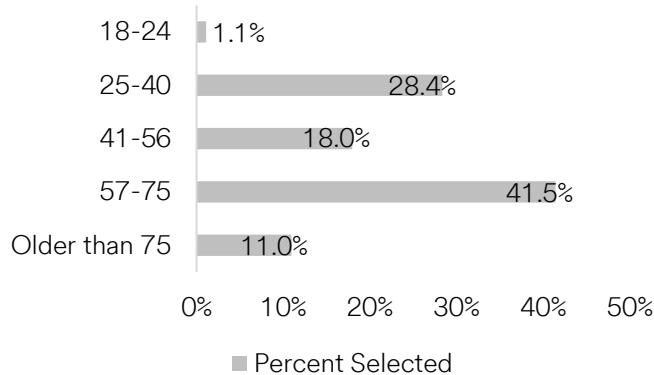
Survey quick facts

1. The average spend on renovation projects by homeowners surveyed was between \$1,000 and \$9,999.
2. 74% of homeowners surveyed say that swapping in eco-friendly construction materials would at least make a strong impact to the environment.
3. 36% surveyed purchased eco-friendly materials for the personal benefit.
4. 56% surveyed purchased eco-friendly materials for the global benefit.
5. 61% of homeowners surveyed find eco-friendly products appealing.
6. When asked about what eco-friendly products interested homeowners recently the products below came up frequently, with 59% actually purchasing the product that interested them.
 - LED lighting and fixtures
 - Appliances
 - Bamboo paper products/flooring
 - Electric cars
 - Decking/flooring
 - Cleaning products
 - Paint
 - Solar panels/tiles
7. When asked about what eco-friendly products interested homeowners recently some unique ideas also emerged.
 - Carbon-reducing cement
 - Denim-recycled insulation
 - Bricks made of thrown-away plastic
8. According to homeowners surveyed, selecting eco-friendly products for construction/renovation materials is on average approximately 10% easier than using bamboo paper products.
9. The following actions were ranked by homeowners on their ability to complete the action or make the decision, from easiest (at the top) to more difficult.
 - Swapping non-LED lightbulbs
 - Choosing energy efficient appliances
 - Using reusable containers and shopping bags
 - Selecting products made from plant-based/renewable resources
 - Using digital format for books
 - Selecting eco-friendly products for construction/renovation materials
 - Using bamboo toilet paper, napkins, paper towels or facial tissue
 - Selecting an eco-friendly/electric car
 - Installing solar panels on the roof/property
10. 23% of the exterior projects performed were roof replacements, 25% were siding and 30% of the projects were windows.

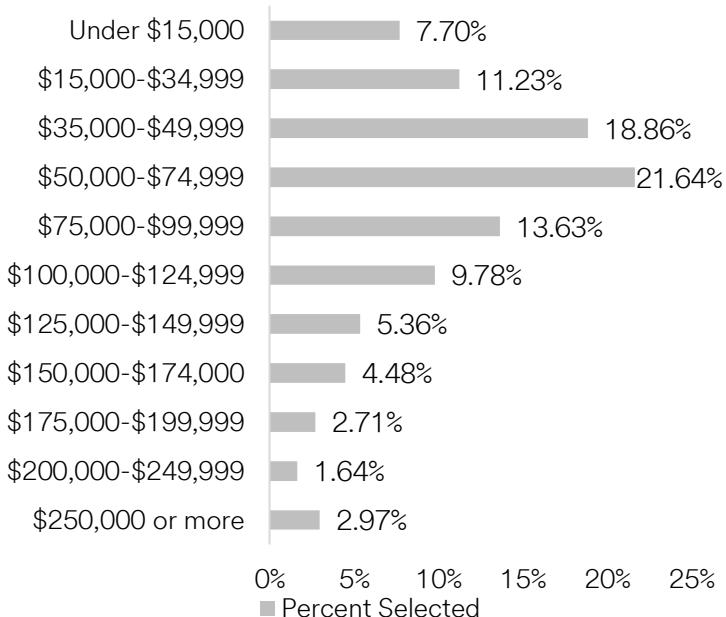
Demographics



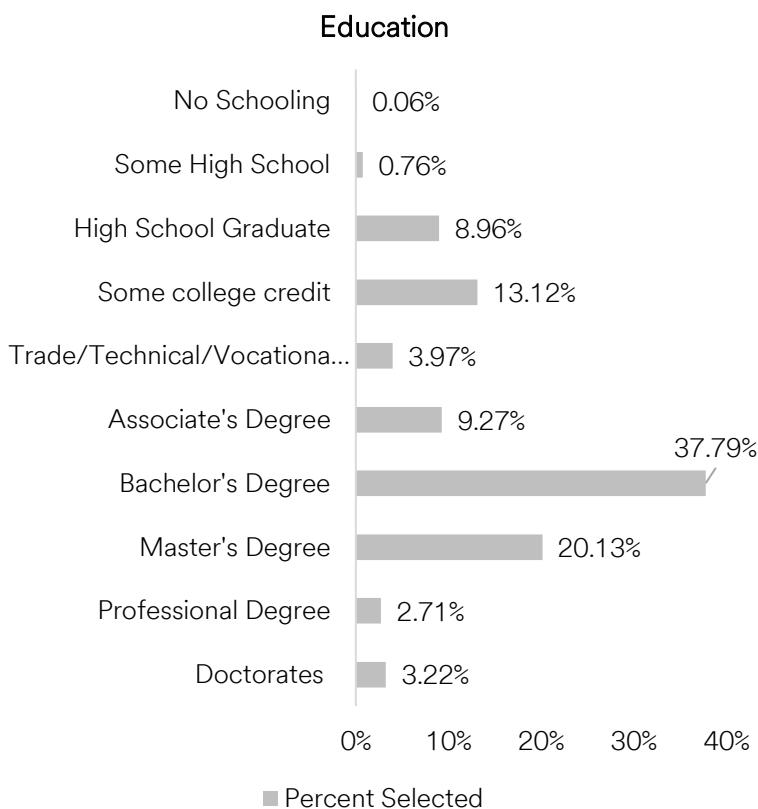
Age



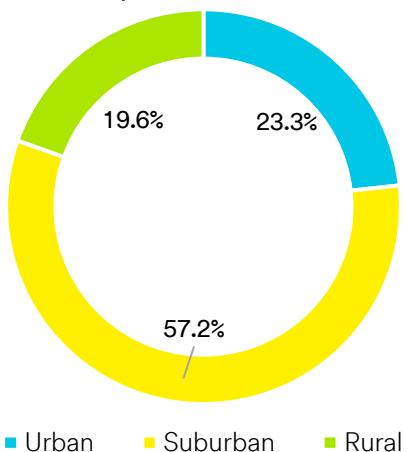
Household Income



Demographics (continued)



Primary Residence Location



3M + One Tree Planted

3M has teamed up with One Tree Planted to donate trees to the U.S. National Forest reforestation program.

3M™ Smog-reducing Granules

3M invented the roofing granule technology that made the world's first smog-reducing shingle possible. Shingles with smog reducing granules remove smog gases from the air with the same effect as trees.

While putting roofs to work is a great option, nothing can replace getting actual trees in the ground which is why 3M teamed up with One Tree Planted to fund the planting of 10,000 trees.

Our hope is that others also become inspired when they choose a new roof to not only select a roof that can make a positive impact for the environment, but to also take one extra step and consider their own donation to plant trees and make an even bigger impact.

Help rebuild a forest in North America.

One dollar donated to One Tree Planted plants one tree.

Plant a tree at: <https://3mtrees.raisely.com>

About the 2021 3M Home Renovation Study

3M conducted an online survey with 1,585 homeowners. The results shared are statistically significant (i.e., the results were likely not due to chance). Survey respondents had joint or full responsibility for home decisions, started or completed a home renovation project between May 2020 and April 2021, and the demographics reflect the general population of homeowners over the age of 18.

Visit <http://3m.com/homereno> to view the highlights.

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