

2010 American Home Comfort Study
HVAC, Home Comfort, And Energy Efficiency
Strategic Intelligence





Strategic Intelligence At Your Fingertips

The American Home Comfort Study is the largest knowledge base of homeowner behavior, perceptions, and attitudes related to HVAC, home comfort, and energy efficiency. Topics include:

- How homeowners select HVAC equipment
- Home comfort differences by region and demographics
- How contractors affect customer satisfaction
- The level of consumers' interest in energy efficiency

Sample

Our expanded and updated 2010 study will be based on insights from over 30,000 homeowners, including in-depth findings from recent purchasers of central HVAC equipment for the home. While still in the field, we expect to include over 3,600 recent buyers:

- 2,200+ replacement buyers
- 800+ new-home purchasers
- 450+ add-on/remodeling customers

Methodology

The 2010 study is being conducted via the Internet among homeowners recruited from Decision Analyst's American Consumer Opinion® panel in August and September.



Who Is Using This Report?

This report presents a comprehensive picture of the HVAC, home comfort, and energy efficiency trends—the fifth biennial study since 2002. The information in the report is used by:

- HVAC manufacturers, distributors and contractors
- Plumbing manufacturers
- Industry consultants
- Ancillary equipment manufacturers
- Retailers
- Media and industry publications
- Trade organizations
- Advertising agencies and public relations firms
- Builders
- Utility companies
- Government agencies
- IAQ manufacturers (portable and central)

Homeowner Behavior And Perception

- Central HVAC equipment owned/ recently purchased
 - Central air conditioning
 - Central furnaces
 - Central boilers
 - Central heat pumps
 - Geothermal heat pumps
 - Ductless mini-split systems
- Ancillary equipment used with central HVAC equipment
 - Heating, cooling, and internal air quality products
 - Whole-house ventilation and humidity-control products
 - Filtration products used
- Market size: purchases for primary/secondary homes and rentals
- Unaided and aided brand awareness of HVAC equipment
- Satisfaction with HVAC equipment
- Desired improvements to home comfort
- Maintenance and service contracts
- Contractor selection criteria
- “Do it yourself” projects
- Use of zoning and programmable thermostats
- Homeowner and home profiles



Profile Of Recent Central HVAC Equipment Purchasers

The 2010 study will include a detailed profile of approximately 3,400 recent central HVAC equipment purchasers in the replacement, add-on/remodeling, and new-home markets.

HVAC Equipment And Brand Selection

- Types and brands purchased and replaced
- Brand familiarity and concerns
- Warranty length, extended warranties

Purchase Drivers

- Key reasons equipment was replaced or added
- Role of energy efficiency
- Age of replaced equipment
- Importance of price

Decision Process

- Homeowners' first decision: contractor or brand?
- How and why brand and contractor were selected
- Importance of referral, reputation, marketing, and brand familiarity

Purchase Process

- Purchase-decision process, time, and amount spent
- Role of the Internet and impact on final spending
- Final decision maker
- Identification of “big spenders”

Temperature Control

- Types and brands of thermostats replaced or added
- Types and brands of thermostats present in new homes
- Location of thermostats and style of homes
- Homeowners who program their thermostats

Homeowner Satisfaction

- Brand, contractor, and home comfort satisfaction
- Satisfaction correlated with:
 - Contractor sales process and presentation
 - Homeowner purchase-decision time
- Homeowner efficiency rating of new HVAC equipment
- Homeowner rating of air quality (purity/humidity)
- Homeowner rating of home's energy efficiency



“Wait till you see the air conditioner!”

Contractor Performance

- Contractor assessment of homeowner needs
- Recommended upgrades and close rates
- Explanation of operation and maintenance
- Callbacks and nature of problem
- Financing options and homeowner acceptance
- Strategies to maximize customer loyalty and satisfaction
- Contractor fixed the problem or did not
- Comfort issues were or were not addressed

Ancillary Equipment

- Heating equipment: space heaters, fireplaces, etc.
- Cooling equipment: room air conditioners, portable air conditioners, and fans
- Portable air purifiers, humidifiers, and dehumidifiers

Energy Efficiency: What Homeowners Know, Believe, And Do

- Attitudes and activities about energy efficiency
- Average temperature settings in winter and summer
- Steps taken to achieve energy efficiency

What Is The Homeowner Paying For Energy?

- Electrical power and natural gas availability, satisfaction, and billing
- Peak heating and cooling costs by region
- Participation in “cost averaging” programs
- Impact of increased energy costs on homeowners
- Received any energy tax credits and/or energy company rebates

Energy Star, ZEH, And SEER

- Awareness and knowledge of Energy Star symbol
- Awareness and knowledge of SEER (Seasonal Energy Efficiency Ratio)
- Energy efficiency level of HVAC system
- New home a “Zero Energy Home” (ZEH) or not

Deliverables

- Comprehensive report:
 - Summary of home comfort market
 - Detailed analysis of key market segments
 - Conclusions and recommendations
 - Hard copy and Internet report access with up to 5 passwords
- Online reporting system
- Custom queries on targeted issues
- Custom presentations
- Custom data collection possibilities by geographical region

For More Information

Call a Market Intelligence Team member at 800-262-5974 for a free preview and more information.



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