



COVID & Home Efficiency Retrofits

June 2020

DOER/MAKER | Sealed

Summary

While homeowners are concerned about COVID, the market is strong for efficiency retrofit services

1. Homeowners are more acutely aware of problems in their home than ever, and have increased interest in home improvement
2. While most homeowners desire to hear from their utility about about home comfort and efficiency opportunities, they have received no memorable communications from their utility during COVID
3. Homeowners expect utilities to be taking a leadership role helping jumpstart the economy more broadly, and view energy efficiency as a pathway to job creation.
4. With remote engagement, strong safety protocols, and affordability options, homeowners are eager to explore the possibilities of significant home upgrades now and in the near future

Research

Sealed and [Doer/Maker](#) partnered to conduct a survey of Northeast homeowners about how COVID has impacted their lives, their relationship to their home, and their interest in energy efficiency.

This deck contains select findings from the survey.

- Total responses: 450
- Age groups: 25-34 (20.22%), 35-44 (24.44%), 45-54 (23.33%), >54 (32%)
- Geography: NY, PA, NJ, MA, CT, RI, ME, NH
- Gender: Male 60%, Female 40%



Sealed

At Sealed, we're unlocking comfort, value, and efficiency in aging homes—and transforming energy, finance, and home improvement along the way.

In partnership with major energy utilities and certified home performance contractors, Sealed finances key home improvements - HVAC, insulation, air sealing, and smart home technology - using the money homeowners currently waste on energy.

Sealed coordinates projects from beginning to end, and we stand behind our work. If we don't reduce a home's energy use, we don't get paid.

sealed.com



D/M

DOER/MAKER

Doer/Maker is a creative marketing agency with a specialization in energy. We've worked with utilities, product companies, SaaS companies, and beyond, to solve problems, do hard things, and make the impossible possible.

We're marketers. We're brand experts. We're creators. Consultants. Strategists. Developers. Data scientists. We're builders. Innovators. Facilitators. We're fixers. Solvers.

We're woman owned.
We have no B team.
We're doers and makers.

We're your secret weapon.

doermaker.com



There's no
place like
home

COVID's impact is real



Survey respondents report that:

90%

are concerned COVID regarding the health of their families and communities

43%

are working from home when they normally do not

13%

have lost their job or been furloughed

23%

have experienced the illness of a close friend or family member



D/M

Home feels more important than ever

Homeowners value their space and many are making and planning home improvements.

58%

I'm thankful for my home

73%

I'm more, or just as likely to spend money on my home

58%

Now is a good time for planning [home projects]

64%

Now is a good time to do research [about home projects]

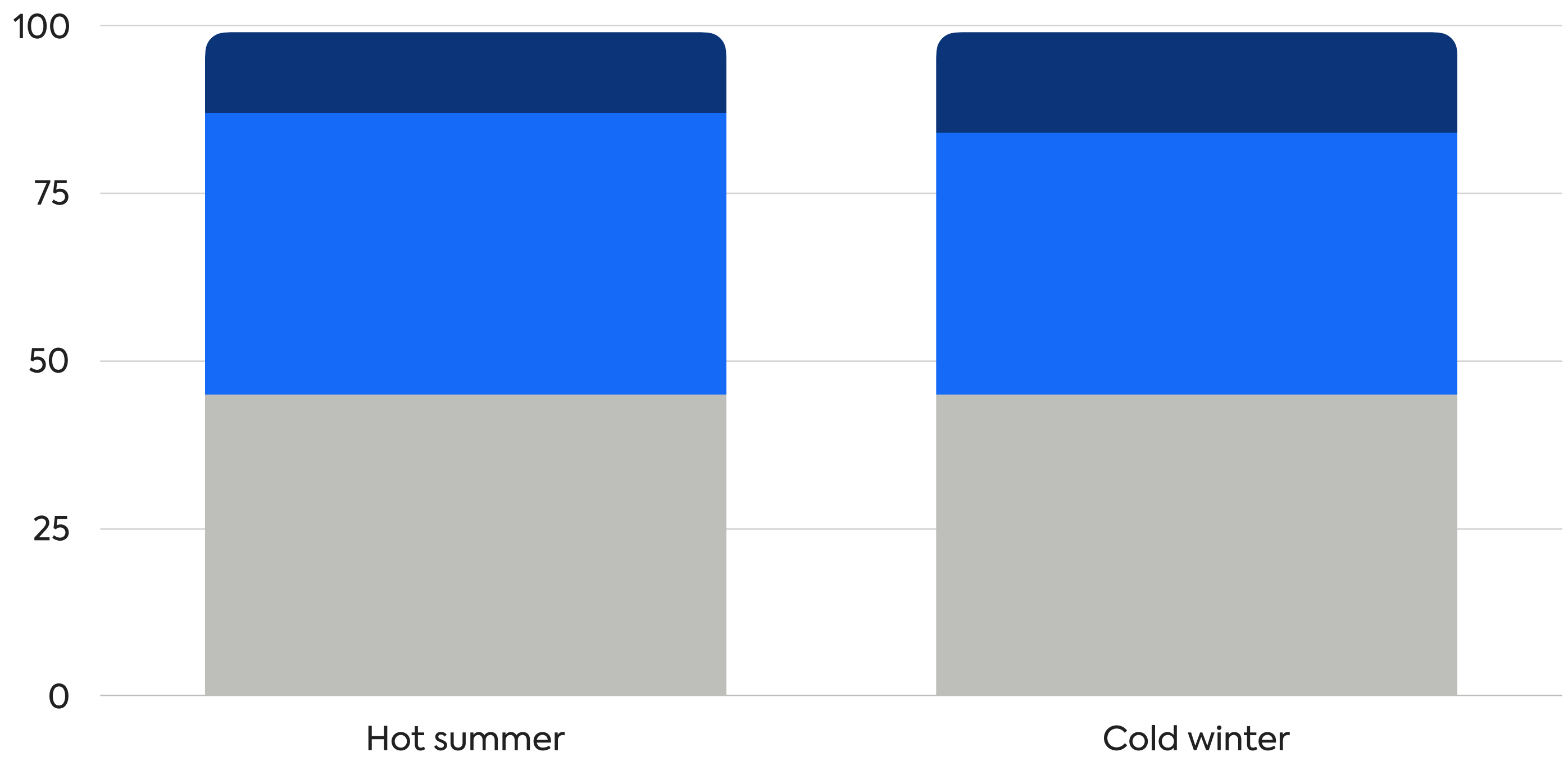
57%

I've added to my list of projects for my home

For most, comfort is top of mind

Q: Are you concerned about having to spend more time at home when the weather becomes very hot or very cold?

- Very concerned
- Somewhat concerned
- Not at all concerned



Home still has challenges, and homeowners feel them now more than ever

58%

Feel the summer heat upstairs

40%

Know their house needs more insulation

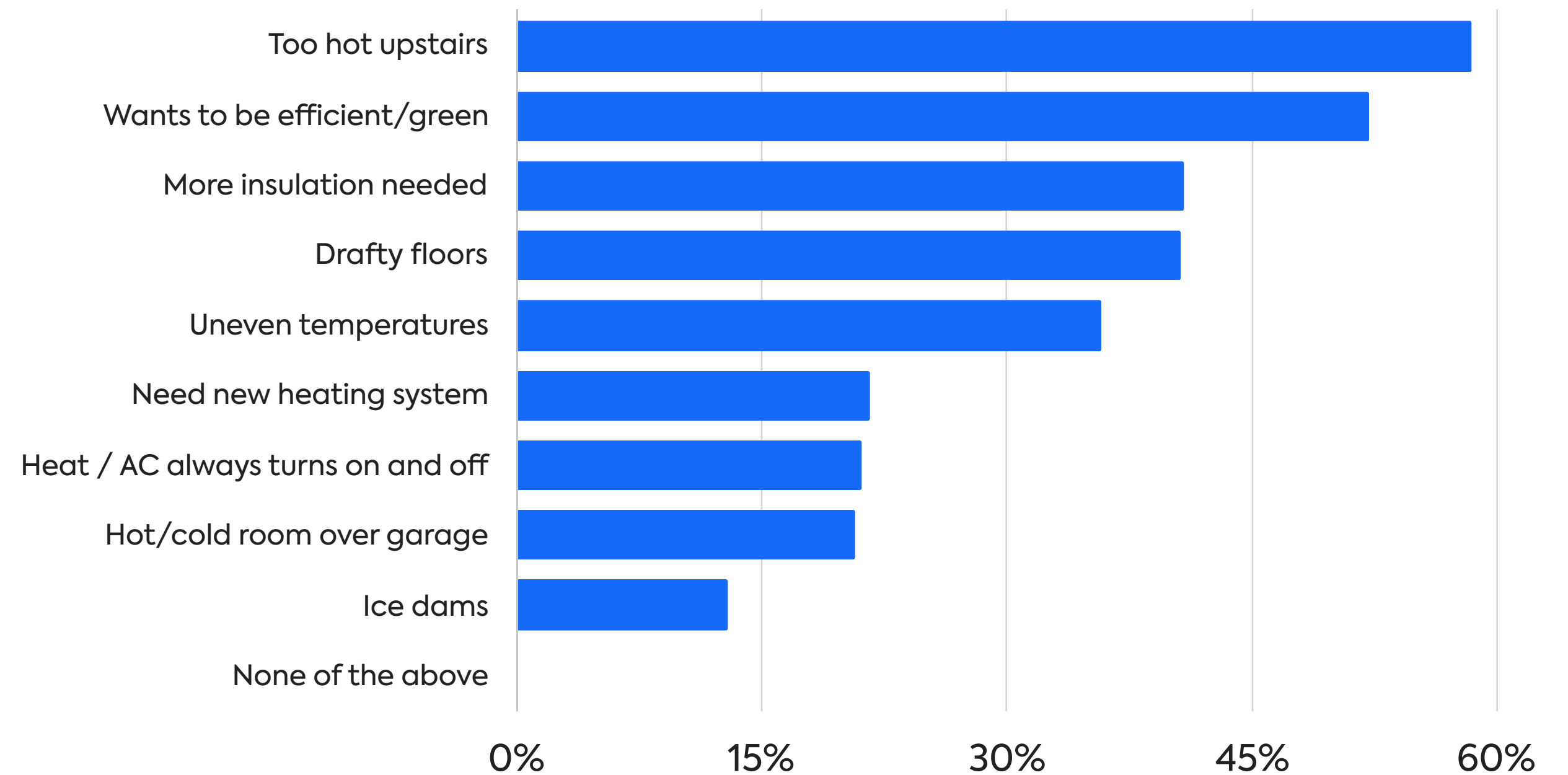
52%

Actively want to make their house more efficient and green



D/M

Q: Does your home have any of the following:





Utilities
should lead

Looking to utilities for answers

Homeowners want utilities to share information with them about opportunities to improve comfort and efficiency. But many have not received communications.

22%

Are paying more attention to communications from their energy utility than before COVID

BUT

68%

Have received no memorable communication from their utility

74%

Would be interested in learning about ways to use less energy and fix uneven temperatures at home

AND

70%

Think it's appropriate for their utility to send emails about Sealed's remote consultation services



D/M

Utilities can play a role in recovery



85%

Feel positive about the idea that energy efficiency puts local contractors to work right in their community, creating jobs and restarting local economies

76%

Think it's important or very important that their energy utility finds ways to contribute to creating local jobs and restarting the local economy





The desire
for home
upgrades
remains
strong.

Moving forward with planned improvements

Nearly half

Of respondents were planning major home improvements (\$5,000-\$10,000 in scope) to happen in the next 6 months

82%

Were planning those upgrades pre-COVID, and had not changed their plans



Removing cost barriers is the key right now

Assuming it was zero out-of-pocket cost to them

81%

would be interested in installing professional energy-saving upgrades like home insulation, sealing air leaks, heating and cooling system replacement, and smart home technology.

With no upfront cost, professional upgrades like insulation, air sealing and HVAC are of interest, for planning and install

41%

Would be interested in installing a project now, assuming proper safety precautions were taken

40%

Would want to wait to install until a time they think it would be safer

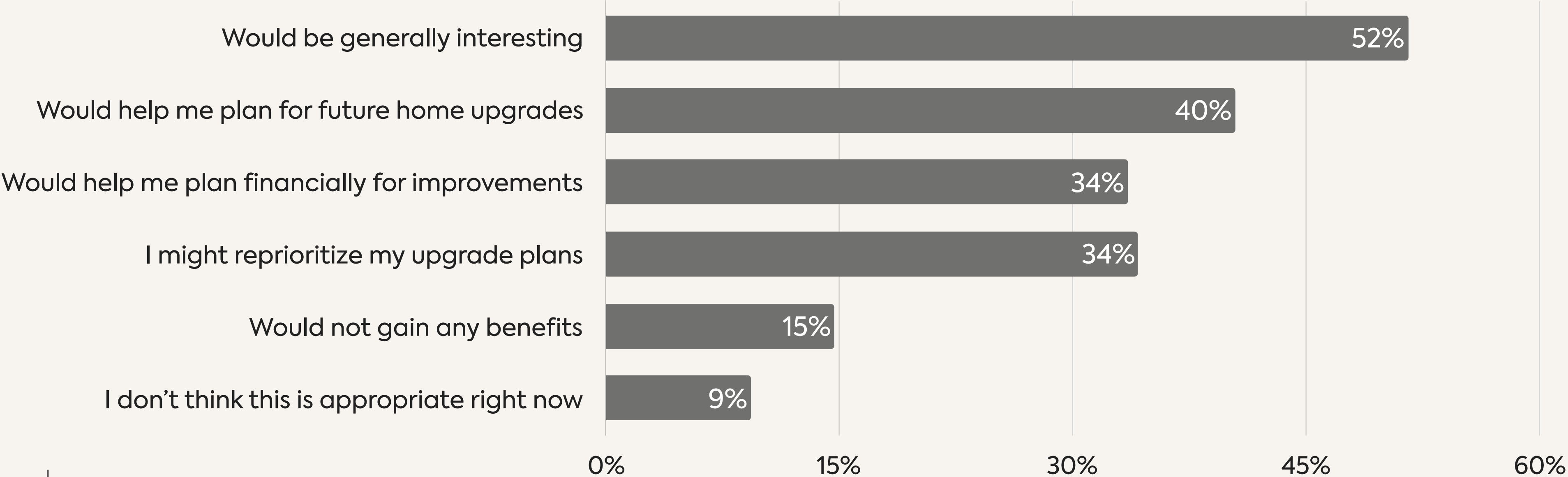


D/M

Remote consultations are of interest

A majority of homeowners would find a remote consultation interesting and helpful for planning

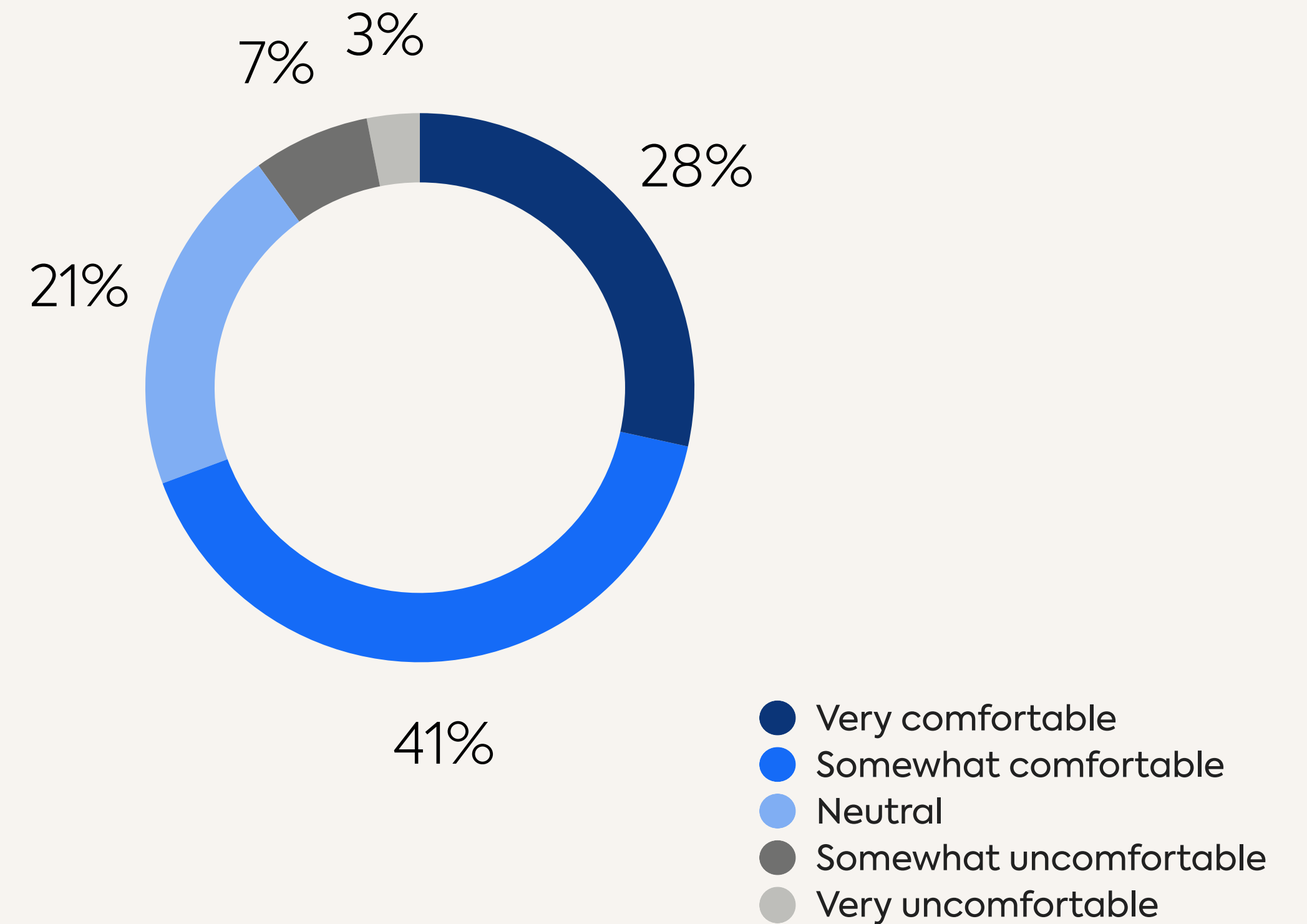
A free remote consultation from Sealed...



Safety precautions are sufficient

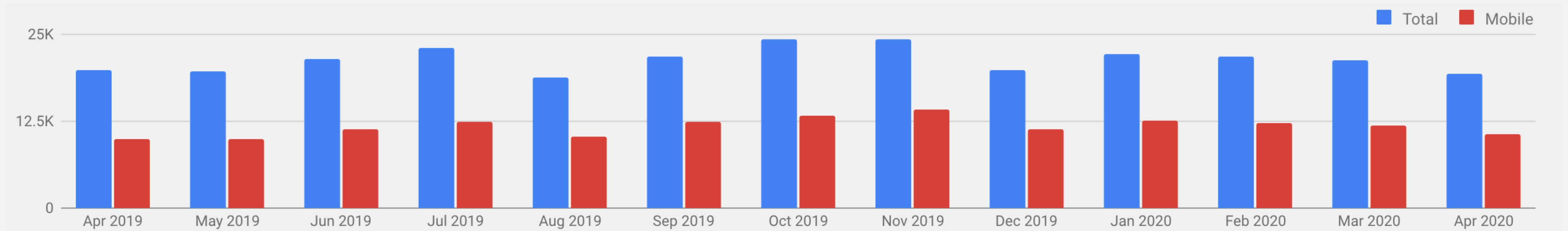
- Worker PPE (N95 masks, gloves, and booties)
- Surface wipe downs (vehicles, offices, home surfaces)
- Continual social distancing (between contractors and homeowners)
- Other health checks (regular temperature checks, no work with contractor or homeowner sickness)

Most homeowners feel comfortable with government safety guidelines



Search volume is comparable to 2019

Google search trends are seasonally normal in New York for relevant home efficiency keywords



Keywords included in analysis: air conditioning, HVAC, insulation, heat pump, energy efficiency





Next steps

Recommendations

Utility communications should offer value to homeowners

1. **Provide more home efficiency retrofit content.** Homeowners are thinking more about the importance of solving home comfort and efficiency issues and want their utility to provide the tools to research and plan for these improvements.

2. **Integrate remote engagement and safety messaging, but don't dwell on it.**

Homeowners are concerned about COVID and want to know that they can research and plan for home efficiency retrofits safely, but are primarily looking for information about improving their home.

3. **Communicate as a leader not a follower.**

Homeowners expect their utilities to lead - from both a safety and economic recovery perspective - but have not yet received memorable communications related to COVID.



Sealed

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How
Sealed is
adapting

Offering safe remote upgrade planning since 2018

Sealed is well suited to continue supporting homeowners by safely providing education, incentives, and attractive financing options to single family homeowners.



“

To have somebody come here and measure...it just wouldn't work in these times...

The beauty of this and the ease of interaction with Sealed is that they're able to do everything remotely.

Dan Ricci
Homeowner
Fishkill, NY



Video: Scott Ricci, a homeowner, describes his excitement to work with Sealed through the remote process during the COVID-19 period of time

[View the video here](#)



Sealed's remote process

Includes education, upgrade plan design, and sales.
Largely unchanged since prior to COVID.

1. **Qualify** - get started online with free eligibility quiz and solution design questionnaire
2. **Consult** - speak to a Sealed specialist by phone to learn more about the program and share more details about the home
3. **Propose** - Sealed presents a custom upgrade plan for the home (created based on online questionnaire, initial phone call, energy usage history analysis, and remote measurements)
4. **Verify** - Homeowners confirm their scope of work by taking pictures of their home in an online, guided experience
5. **Waitlist to Install** - Homeowners sign a project agreement that will be installed when it is safe to do so

Unchanged

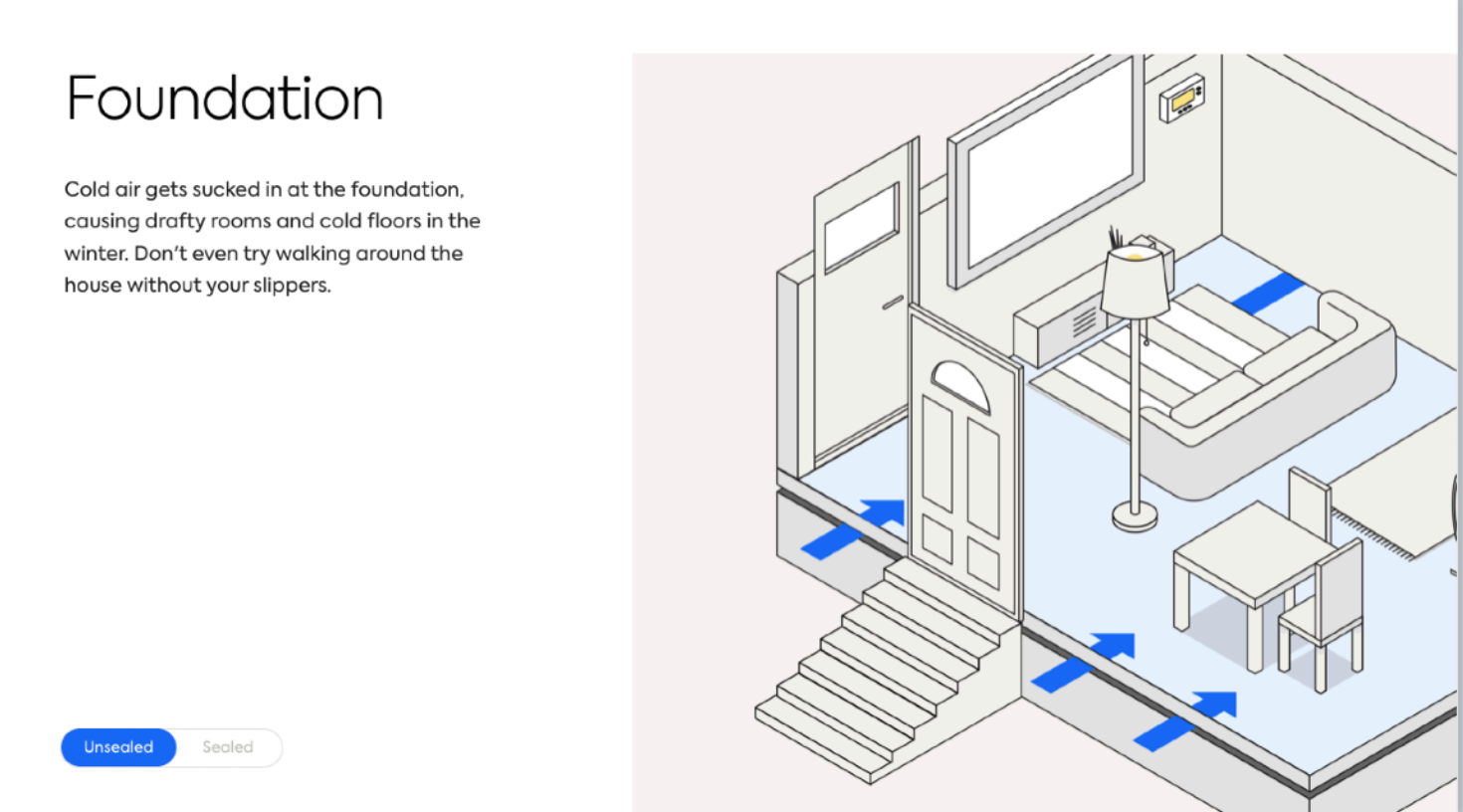
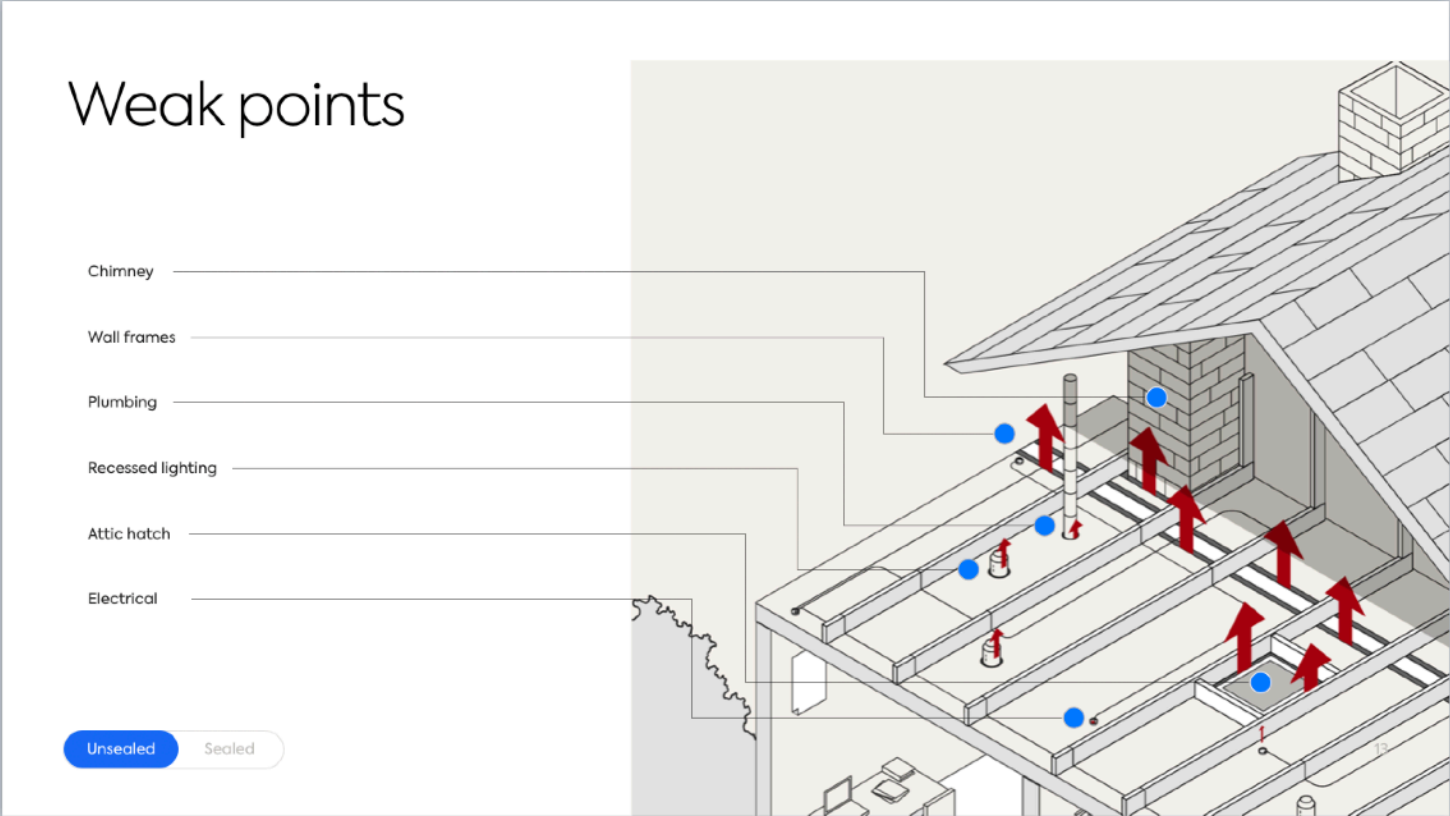
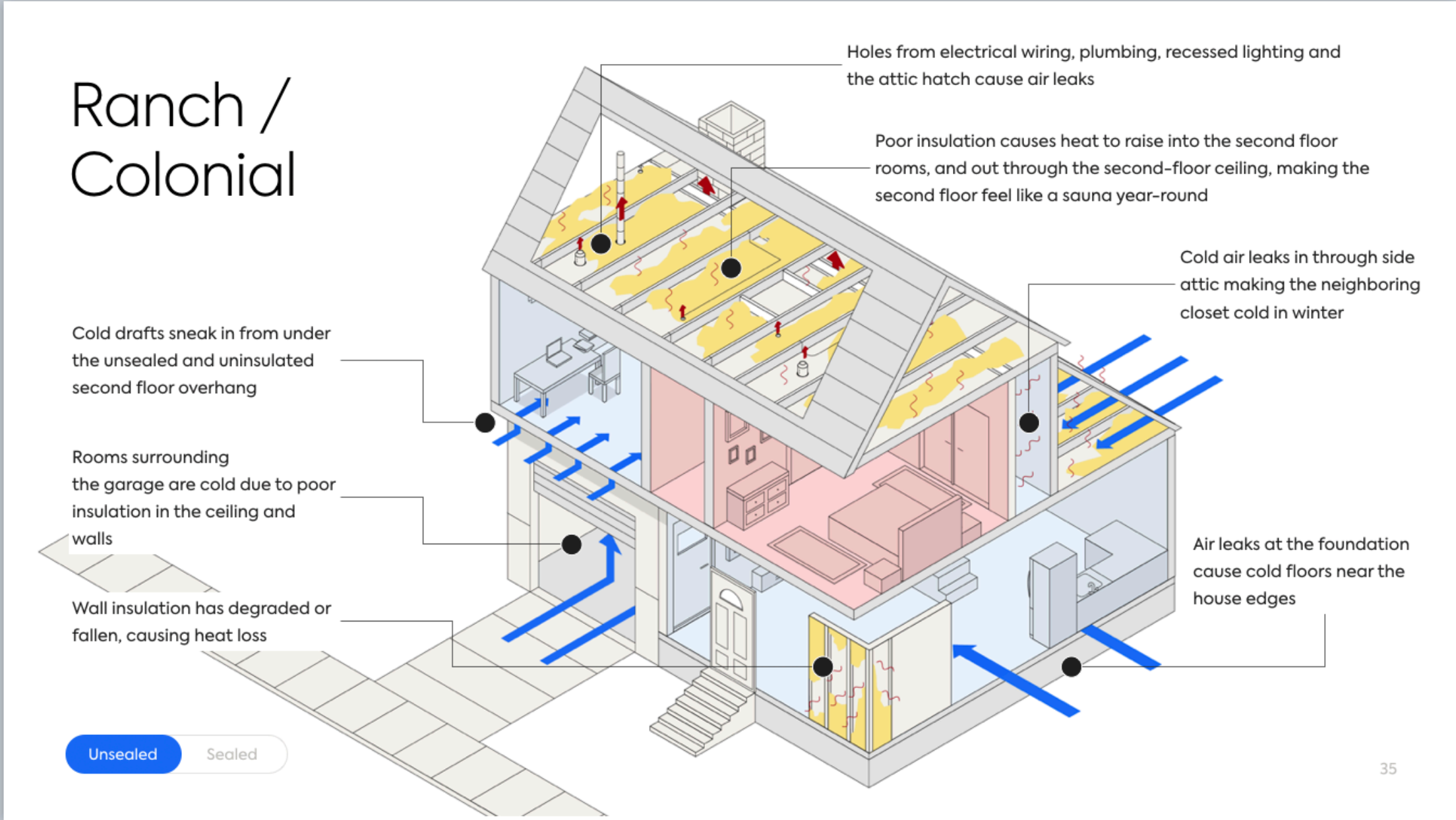
Updated in response to COVID-19



Remote education

Sealed Solution Architects leverage educational content to demonstrate core building science principles

Visit sealed.com/home-tour for more examples



Remote project scoping

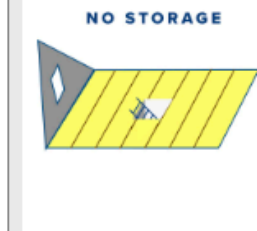
Sealed Solution Architects are able to create an initial upgrade plan and estimate for homeowners by combining customer-submitted data during the initial questionnaire, energy history analysis, and remote house measurement via Google Maps

Read more about the Sealed process [here](#)



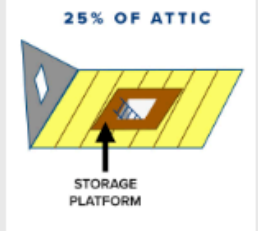
4 → How much of your attic is currently used for storage? *

NO STORAGE



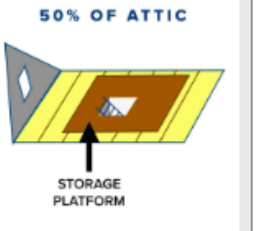
A No storage

25% OF ATTIC



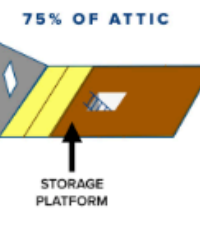
B 25%

50% OF ATTIC



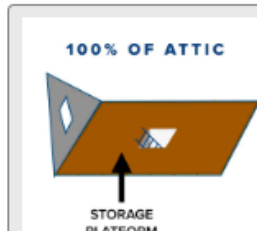
C 50%

75% OF ATTIC



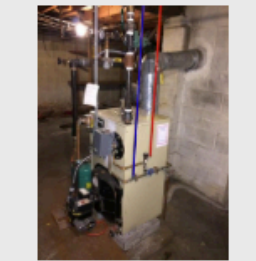
D 75%

100% OF ATTIC




E 100%

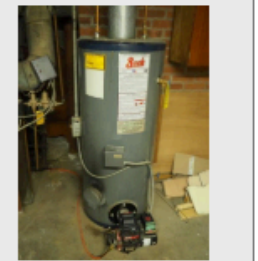
10 → What kind of water heater do you have? *




A No tank - heated by the boiler



B Tank connected to boiler (water heated by boiler)



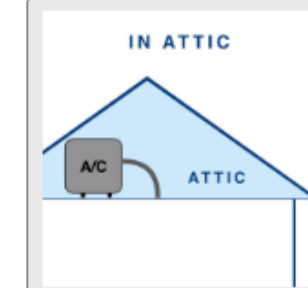
C Standalone tank (fires up itself)



D Not sure

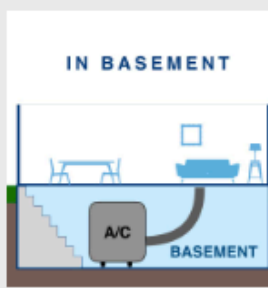
7 → Where was the air handler for your central air conditioning system installed? *

IN ATTIC



A Attic

IN BASEMENT



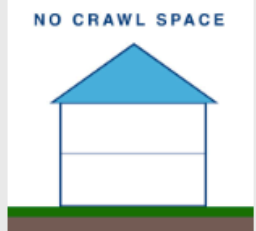
B Basement

15 → Do you have any crawl spaces located under living spaces in your home? *

These are often found under additions or connected to basements.

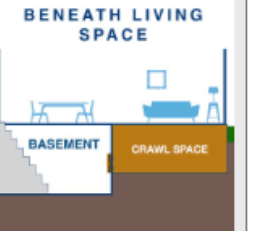
Choose as many as you like

NO CRAWL SPACE



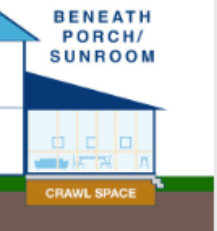
A No crawl spaces

BENEATH LIVING SPACE



B Crawl space(s) entirely or partially under the living space

BENEATH PORCH/SUNROOM

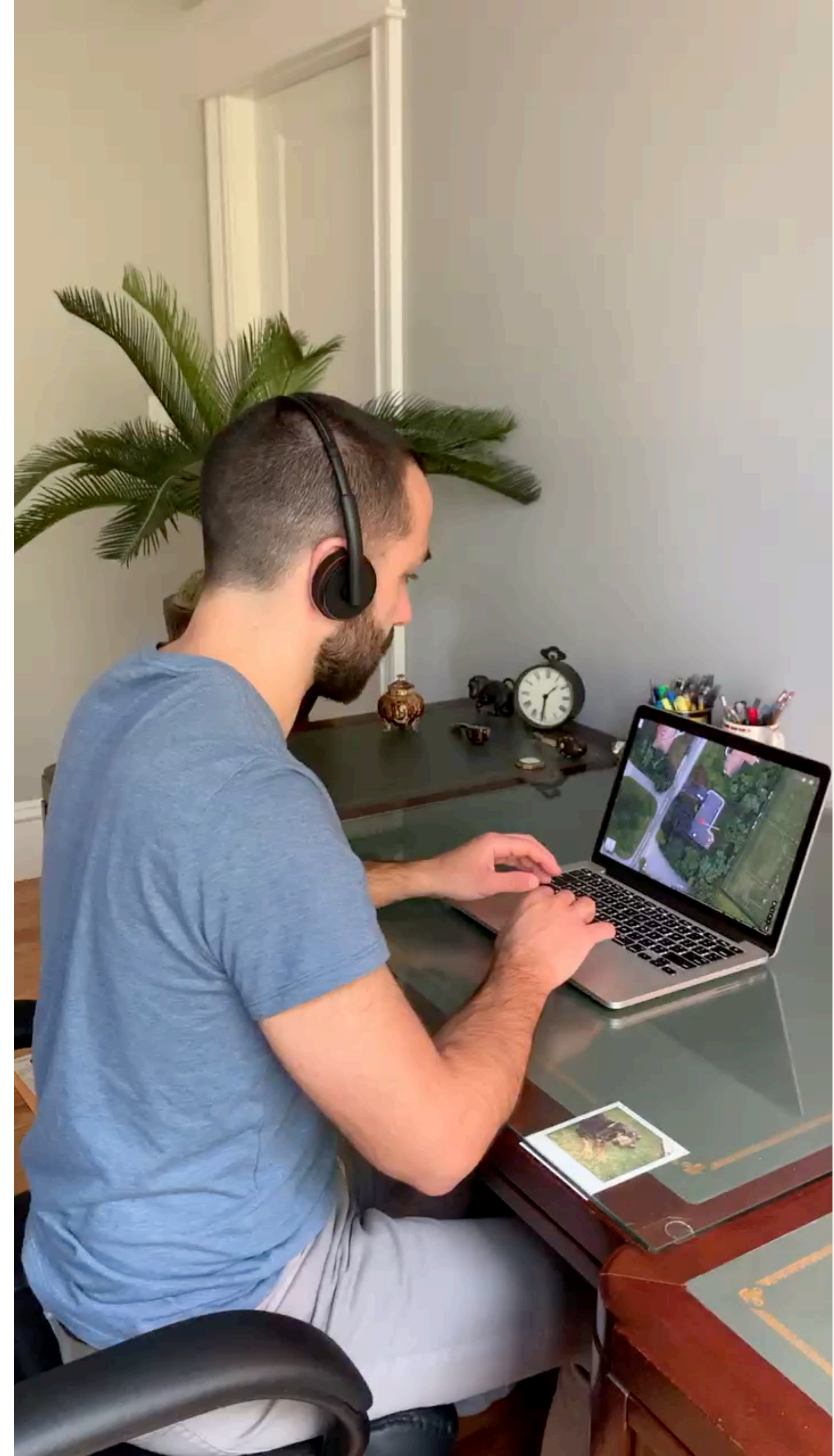


C Crawl space underneath a porch

Remote sales

- Sealed Solution Architects provide personalized recommendations to each homeowner based on pain points, remote scoping, and budget
- Solution Architects can adjust scope in real time to provide homeowners with different project options
- Project integrates all available incentives from utilities and other sources

Right: Sealed Solution Architect, Will, scoped an insulation project by measuring the attic square footage on google maps, and walks a homeowner through his analysis of the house



Remote verification

- Pre-COVID, homeowners received a “Verification Visit” from a contractor to confirm scope similar to a traditional in-home energy audit
- Post-COVID, homeowners interested in moving forward with a project are provided the ability to verify their scope remotely
- Homeowners leverage an online remote verification guide to take the pictures Sealed and contractor partners need to finalize a project agreement

Right: Example of online remote verification guide aimed at capturing key pictures inside and outside of the home (in this example, the attic).



13 → Climb into the **attic space(s)**. Take photos showing each side of each attic space and the attic floor.

Be sure to shine a light in the attic and use flash so the photos are visible. Make sure to capture where the roof meets the attic floor.

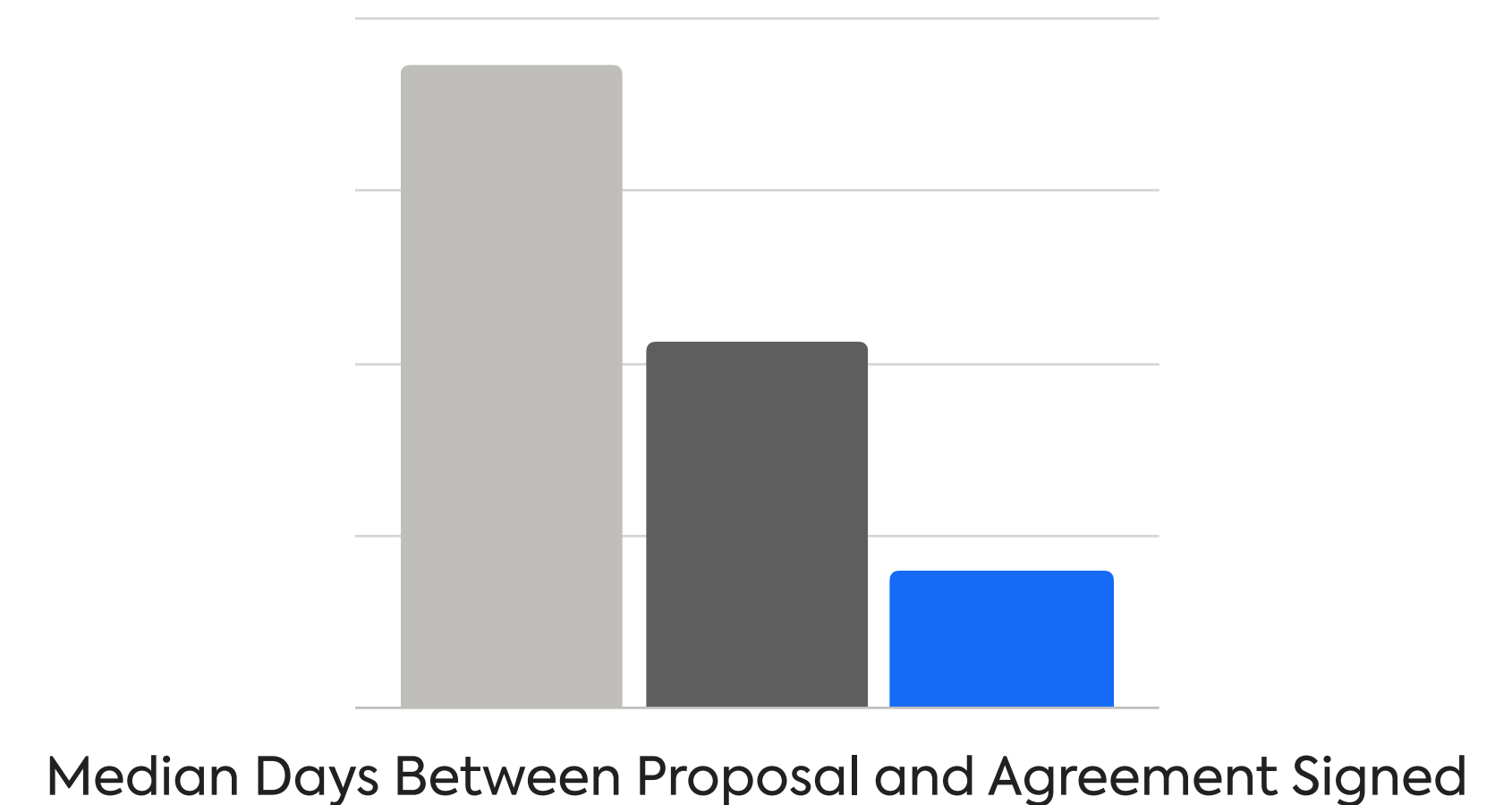
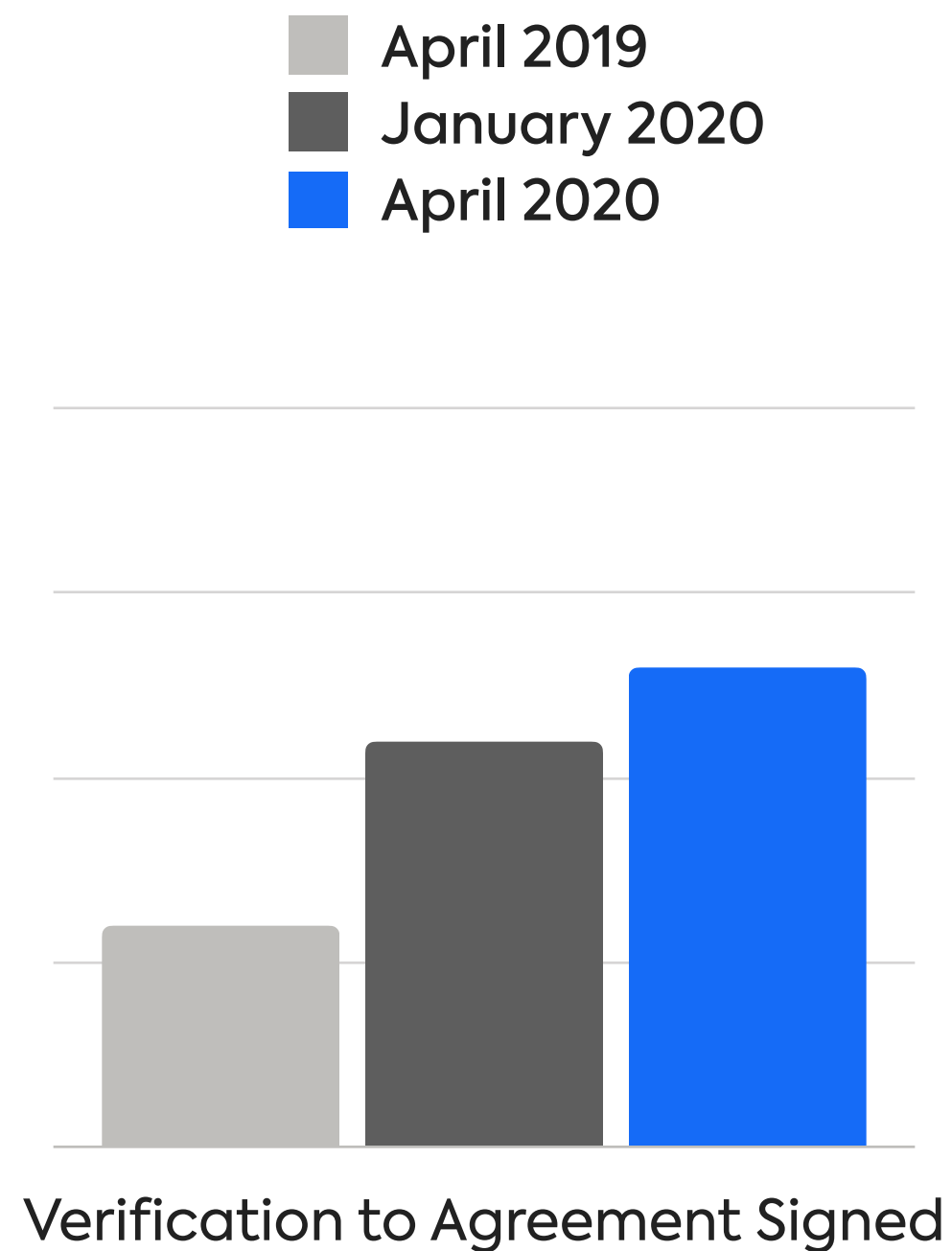
We are hoping to see how much insulation you currently have and what other equipment is currently in the attic space(s). Be sure to capture any storage areas, ductwork and lighting.



A Next: kneewalls

Remote is effective pre- and post-COVID

1. Key conversion rates from verification to agreement signed have remained steady with in-home versus remote process
2. Remote verification process has sped up the process for homeowners
3. Homeowners who have signed agreements have expressed eagerness to install projects



1. Based on Sealed sales data for proposals presented in April 2019, January 2020, and April 2020 to date. April 2019 and January 2020 represent in-home verification data and April 2020 represents remote verification data.

Help create
3,000 job
hours



Build For The Future

Let's create a new green workforce

- A new initiative, sponsored by Sealed, designed to create new, green jobs by connecting homeowners with affordable home upgrades and discounts.
- Learn more at sealed.com/build

Sealed

Lauren
CEO and Co-founder, Sealed

Video: What is Build For The Future?

[View the video here](#)



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