



Earned Loyalty

As our annual survey of brand awareness reveals, once a manufacturer has earned trust, it's hard for other brands to capture those customers.

IT'S 2015, and the residential construction market continues to strengthen. So what's changed since last year? Have manufacturers taken advantage of the uptick to earn new customers?

According to our latest Readers' Choice Survey, overcoming brand loyalty isn't easy. Most of the category leaders remained on top, with some minor reshuffling in the positions below.

There were some notable shifts: GE and Owens Corning gained ground in several categories; GE was right on the heels of Bosch as the one brand customers most associate with sustainable products and environmental stewardship—a sign that the company's "Ecomagination" campaign might be paying off. In the following pages, we'll provide our analysis of the trends, the leaders and the upstarts in each category.

2015 READERS' CHOICE SURVEY RESULTS

Our latest survey of green professionals shows which green branding efforts are reaching this hard-to-win group's loyalty.

Which company offers the greenest LIGHTING products?

GE		26.6%
Phillips		19.7%
SYLVANIA		15.3%
Cree		14.4%
Halo		7%
Cooper		6.1%
Sea Gull		3.5%
Thomas		2.2%
Juno		1.8%
Kichler		1.3%
Savoy House		1.3%
Progress		0.9%

MARKET WATCH. GE has capitalized on LED trends by developing a wide range of products, including connected "smart" bulbs and attractive, affordable incandescent replacements.

GE 26.6%

Which company offers the greenest INSULATION products?

Owens Corning		29.1%
GreenFiber		13.9%
CertainTeed		10.0%
Icynene		9.1%
Johns Manville		7.8%
BioBased		7.0%
Dow		6.1%
Nu-Wool		5.7%
BASF		4.4%
Knauf		1.7%
Guardian		1.3%
Bayer Material Science		1.3%
Applegate Insulation		0.9%
Demilec		0.9%
NCFI (InsulStar)		0.4%
LaPolla		0.4%

MESSAGE RECEIVED. Owens Corning's broad sustainability goals and commitment to transparency are paying off.

Owens Corning 29.1%

Which company offers the greenest ROOFING products?

Owens Corning		22.9%
EnviroShake		15.0%
CertainTeed		14.1%
GAF		12.3%
EcoStar		10.1%
Boral		5.7%
TAMKO		5.7%
Custom-Bilt Metals		5.3%
DaVinci Roofscapes		2.6%
Atlas Roofing		2.2%
DECRA		1.8%
Ludowici Roof Tile		1.3%
Fabral		0.9%

TOP PLAYER. Owens Corning jumped ahead of CertainTeed this year. Is their emphasis on complete roof and wall systems attracting pros, or is it the company's robust asphalt shingle recycling program?

Owens Corning 22.9%

Which company offers the greenest STRUCTURAL SYSTEM products?

Boise Cascade (EWP)		25.6%
Weyerhaeuser (Trus Joist)		22.0%
Premiere Building Systems (SIP)		9.4%
BuildBlock (ICF)		9.0%
Reward Wall Systems (ICF)		6.3%
Logix (ICF)		5.8%
R-Control (SIP)		5.4%
Fox Blocks (ICF)		4.0%
Norbord (EWP)		3.6%
NUDURA (ICF)		2.7%
LP (EWP)		2.2%
Georgia-Pacific (EWP)		1.8%
Ainsworth (EWP)		0.9%
AFM (SIP)		0.9%
Stramit (SIP)		0.5%

ON PAR. Taken together, SIP and ICF manufacturers are just as popular as those offering engineered wood. This is not surprising, as ICF and SIP systems, once considered "alternative," are being increasingly embraced for their energy efficiency and labor savings.

Boise Cascade 25.6%

Which company offers the greenest SIDING products?

James Hardie (fiber cement)		25.9%
BASF (EIFS)		13.8%
CertainTeed CedarBoards		13.0%
KlipTech EcoClad		11.2%
Dryvit		5.8%
LP SmartSide		5.4%
Nichiha (fiber cement)		4.0%
Eldorado Stone (manufactured stone)		4.0%
Omega (stucco)		3.1%
Boral (brick and manufactured stone)		3.1%
Allura		2.7%
CalStar		2.2%
Sto Corp (EIFS)		1.8%
K2 Stone		1.8%
LaHabra		1.3%
MAXITILE		0.9%

STILL NUMBER ONE. James Hardie continues to dominate the field. The company is committed to reducing waste, water and energy and sourcing local materials. We'd like to see them develop a recycling program, too.

James Hardie
(fiber cement)
25.9%

Which company offers the greenest APPLIANCE products?

GE		22.7%
Bosch		22.7%
LG		12.2%
Whirlpool		10.9%
Electrolux		6.1%
KitchenAid		5.2%
Samsung		4.8%
Miele		4.4%
Viking		3.5%
Sub-Zero/Wolf		2.6%
Jenn-Air		2.2%
Gaggenau		1.3%
Thermador		0.9%
Dacor		0.4%

STATUS QUO. The top four brands retained their positions this year. These companies also have a head start when it comes to developing and marketing smart appliances, which we predict are poised to take off in the near future.

GE 22.7%
Bosch 22.7%

Which company offers the greenest COUNTERTOP products?

DuPont Corian		20.2%
Eco by Cosentino		18.4%
PaperStone		13.2%
Cambria		9.2%
Caesarstone		8.3%
LG		5.3%
Wilsonart		5.3%
Hanwha Surfaces HanStone		4.0%
DuPont Zodiaq		4.0%
Formica		4.0%
IceStone		3.5%
Samsung		2.6%
Vetrazzo		2.2%

SUSTAINABLE ALTERNATIVES. Our pros believe solid surface, quartz and composites with a higher percentage of recycled content (such as Eco by Cosentino and PaperStone) are greener options than mined granite.

DuPont Corian
20.2%

Which company offers the greenest HEATING, VENTILATION and AIR CONDITIONING products?

Trane		18.6%
Lennox		15.6%
Mitsubishi		13.0%
Carrier		10.8%
Bosch		7.8%
Rheem		7.4%
ClimateMaster		6.1%
WaterFurnace		5.2%
Daikin		3.9%
Weil-McLain		2.6%
LG		2.6%
Uponor		1.7%
Goodman		1.7%
Panasonic		1.3%
York		0.9%
Unico		0.9%

HIGH STANDARDS. Most of the top brands have earned their reputations with decades of quality and innovation.

Trane
18.6%

Which company offers the greenest **HOT WATER SYSTEM**?

Rheem (tankless)		16.8%
Rinnai (tankless)		14.6%
Bosch (tankless)		13.3%
Velux (solar)		12.0%
GE (hybrid)		9.7%
A.O. Smith		8.9%
Heliodyne (solar)		6.6%
Bradford White		4.0%
Navien		4.0%
Takagi		3.5%
Marathon (storage tanks)		3.1%
Noritz		2.2%
Stiebel Eltron (tankless)		1.3%

TANK(LESS) TOPS. This is another category with many high-quality, well-established brands. Tankless products prevail, but we predict heat pump water heaters will gain in popularity this year.

Rheem (tankless) 16.8%

Which company offers the greenest **DECKING** products?

Trex		33.6%
TimberTech		16.1%
CertainTeed EverNew		9.0%
Viance Ecolife		9.0%
GeoDeck		8.5%
NyloBoard		4.9%
Fiberon		4.9%
ChoiceDek		4.5%
TruGrain		3.6%
TAMKO EverGrain		2.7%
MoistureShield		1.8%
Kleer		1.4%

QUALITY CONTROL. Trex remains the undisputed leader in this category. Trex decking contains 95 percent recycled content and the company also offers capped composites now.

Trex 33.6%

Which company offers the greenest **FLOORING** products?

Armstrong		39.7%
Shaw		17.4%
Mohawk		14.6%
Interface		8.2%
Forbo		5.5%
Crossville Tile		4.6%
Tiles of Italy		4.6%
Lauzon		3.2%
Mullican Flooring		2.3%

FLOORED. The recent Lumber Liquidators debacle is sure to make pros pay more attention to this category, and we expect manufacturers to respond with increasing transparency and focus on their products' impact on indoor air quality.

Armstrong 39.7%

Which company offers the greenest **WINDOW** and/or **DOOR** products?

Andersen		31.9%
Pella		18.1%
Marvin		13.4%
Therma-Tru		6.5%
JELD-WEN		5.2%
Milgard		4.7%
Loewen		2.6%
Weather Shield		2.6%
Kolbe		2.2%
Ply Gem		2.2%
Masonite		2.2%
Euroline		1.7%
Sierra Pacific		1.7%
MI Windows & Doors		1.3%
Integrity		1.3%
Hurd		0.9%
PGT		0.4%
Simonton		0.4%
Windsor		0.4%
ProVia		0.4%

WINDOW TO SUCCESS. Andersen enlarged its lead this year. The company has ramped up its sustainability efforts in recent years, and is the first major window and door company to announce ambitious sustainability goals.

Andersen 31.9%











Which company offers the greenest **PHOTOVOLTAIC SYSTEM** products?

SunPower		23.7%
SolarCity		13.7%
LG		10.1%
CertainTeed		9.1%
Panasonic		8.7%
SunEdison		6.9%
Kyocera		6.4%
Sharp		5.5%
ReneSolar		5.0%
Sanyo		5.0%
Namaste		4.1%
Hanwha SolarOne		1.8%

SUN FOR RENT. Two companies that offer solar leasing programs are leading the charge in this category, reflecting the larger national trend toward third-party solar ownership.

SunPower 23.7%












Which company offers the greenest **SOLAR THERMAL** products?

Bosch		21.2%
SunMaxx Solar		17.1%
Rheem		16.7%
SolarUS		12.6%
LG		12.2%
Heliodyne		6.8%
Daikin		5.0%
AET Solar		4.1%
Steibel Eltron		3.2%
Apricus		1.4%

BROAD INFLUENCE. Bosch continues to rank highly in all of the categories covered by the company's thermotechnology division.

Bosch 21.2%













Which company offers the greenest **PLUMBING FIXTURE** products?

Kohler		37.1%
Moen		14.9%
American Standard		11.4%
TOTO		10.9%
Delta		10.5%
GROHE		5.2%
Niagara		2.6%
Hansgrohe		2.6%
Pfister		2.2%
Gerber		1.3%
Geberit		1.3%

STRONG MESSAGE. Our pros still regard KOHLER as the gold standard, when it comes to water conservation.

KOHLER 37.1%











Which company offers the greenest **BUILDING WRAP** products?

DuPont Tyvek HomeWrap		33.9%
Owens Corning PinkWrap		11.9%
Pactiv Green Guard		11.0%
Dow WEATHERMATE		10.6%
Tremco Enviro-Dri		9.3%
TYPAR HouseWrap		7.1%
CertainTeed		4.0%
Sto Corp StoGuard		3.1%
Benjamin Obdyke HydroGap		3.1%
Kimberly-Clark BLOCK-IT		2.6%
Keene Driwall		1.8%
Cosella-Dorcken Delta Dry		1.8%

GOOD WRAP. Although DuPont Tyvek's lead isn't quite as decisive as it was last year, it's still the go-to brand for a lot of builders. It will be interesting to see how the newer products with specialized drainage channels fare in the next few years.

DuPont Tyvek HomeWrap 33.9%












Which company offers the greenest **CABINET and SHELVING** products?

IKEA		26.2%
KraftMaid		19.0%
Merillat		17.2%
Timberlake		10.0%
Echelon Cabinetry		6.3%
Executive Cabinets		5.9%
Neil Kelly		5.4%
MasterBrand		4.5%
Wellborn		3.6%
Advanta Cabinets		1.8%

NICHE MARKETING. Swedish manufacturer IKEA still dominates U.S. manufacturers, according to our pros. Perhaps this is because some of the "green" domestic brands, such as Neil Kelly and Wellborn, tend to attract smaller, regional followings.

IKEA 26.2%






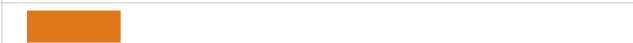
Which company offers the greenest **PAINT and COATING** products?

Sherwin-Williams		27.8%
Benjamin Moore		17.5%
BEHR		14.8%
Valspar		13.9%
Mythic		6.7%
Glidden		6.3%
PPG		4.0%
Dunn-Edwards		3.6%
Kelly-Moore		2.2%
Olympic		2.2%
YOLO Colorhouse		0.9%

NAME RECOGNITION. Sherwin-Williams continues to dominate this field, but certifications such as GREENGUARD are helping other manufacturers gain loyal customers.

Sherwin-Williams 27.8%

Which company offers the greenest **VENTILATION FANS?**

Panasonic		31.7%
Broan-NuTone		28.6%
Fantech (Systemair)		16.5%
Delta Breez		12.1%
Air King		9.4%
S&P		1.8%

FAN BASE. Broan-NuTone is right behind Panasonic this year. The growing industry-wide focus on indoor air quality is likely to drive new marketing campaigns in this category.

Panasonic 31.7%

Which company offers the greenest **WORK VEHICLES**?

Ford		33.9%
Toyota		24.9%
Chevy		9.9%
Nissan		7.7%
Mercedes-Benz		7.3%
Dodge Ram		6.4%
Sprinter		6.0%
GMC		3.9%

Ford 33.9%

Rate how easy it is to access **SUSTAINABLE PRODUCTS** in each product category.

1=Most Green Options;
2=Some Green Options;
3=Fewest Green Options

	1	2	3
Cabinets	20.3%	59.9%	19.8%
Insulation	62.9%	29.6%	7.5%
Countertops	29.1%	54.5%	16.4%
Faucets	32.7%	53.3%	14.0%
Lighting	60.3%	31.8%	7.9%
Roofing	22.8%	61.4%	15.8%
Siding	33.5%	55.4%	11.2%
HVAC	49.8%	41.4%	8.8%
Fixtures	36.3%	49.3%	14.4%
Paints and Adhesives	33.0%	48.8%	18.1%
Structure	29.0%	55.8%	15.2%
Appliances	50.9%	39.9%	9.2%
Windows	60.3%	32.4%	7.3%

Pick the **ONE BRAND** that you associate most strongly with sustainable products and environmental stewardship.

Bosch		11.3%
GE		9.6%
Owens Corning		7.4%
Weyerhaeuser		7.0%
CertainTeed		6.1%
SolarCity		5.7%
LG		5.7%
Boise Cascade		5.7%
SunPower		5.2%
Whirlpool		3.9%
Dow		3.5%
Siemens		3.5%
Shaw		2.6%
Panasonic		2.6%
BASF		2.6%
Kohler		2.2%
Trane		2.2%
Pella		2.2%
Icynene		2.2%
Mohawk		1.7%
DuPont		1.7%
Johns Manville		1.7%
Uponor		1.3%
Hanwha SolarOne		0.9%
Armstrong		0.9%
Electrolux		0.4%
Boral		0.4%

MOVEMENT. While Bosch remains the overall winner in this category, GE and Owens Corning both made small gains. Both companies have ramped up their sustainability agendas—and have gone to lengths to publicize them.

Do you **AGREE OR DISAGREE** with the following statements?

	AGREE	DISAGREE
It's getting easier to tell sustainable brands from ones that are simply "greenwashing."	48.7%	51.3%
The quality of eco-friendly products is generally improving from year to year.	93.3%	6.7%
Brand is more important than price when it comes to choosing between two similar green products.	48.9%	51.1%
I tend to assume a green product will be of higher quality if I know and trust the brand.	76.8%	23.2%
When specifying green products and materials, I typically start with a known brand and go from there.	85.7%	14.3%

Do you **AGREE OR DISAGREE** with the following statements?

	AGREE	DISAGREE
I try new green brands all the time. That's the only way to see if they work.	36.5%	63.5%
My experience with newer green brands has been good. They usually live up to their product literature.	63.5%	36.5%
We need more innovation and experimentation from the manufacturer side, when it comes to green building science.	93.3%	6.7%
We have enough brands. It's more important to improve the technologies we have.	63.3%	36.7%





What are the **TOP REASONS** why you would consider a new brand?

(Rank in order of importance.)

Performance		51.9%
Quality		22.7%
Price		9.8%
Sustainable attributes		4.2%
Design/aesthetics		3.7%
Warranty		3.2%
Brand reputation		1.4%
Advanced/new product features		0.9%
Consumer recommendation/preference		0.9%
Corporate sustainable initiatives		0.9%
Dealer/distributor recommendation		0.5%

SHOW, DON'T TELL. Performance is far and away the thing that would convince our pros to try a new brand. Manufacturers, take note: if a product lives up to its hype, builders will tell each other about it.

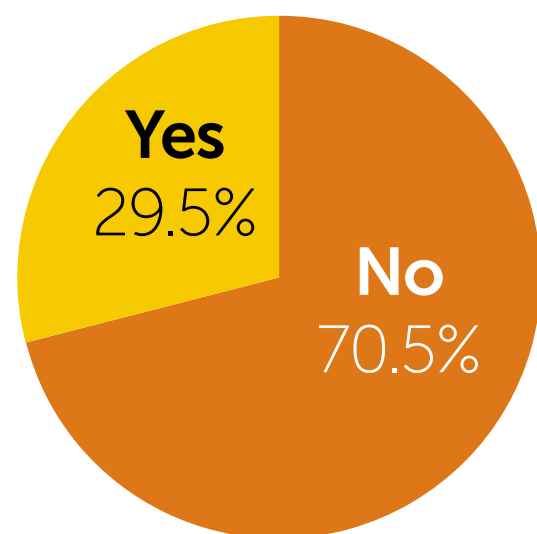
Who makes the final decisions about **BRAND SPECIFICATION** for your projects?

Homeowner/buyer/consumer		50.2%
Architect/designer		26.5%
Builder		16.1%
Contractor		7.1%

DECISION MAKERS. Because homeowners are making the bulk of the purchasing decisions, it's important to educate them about the sustainability impacts of their choices.

















Homeowner/ buyer/consumer 50.2%

Do you currently use the **HERS** Index for your projects?



Which categories are **MOST INFLUENCED** by green building and sustainability considerations?






(Choose your top three, in no ranking order.)

Insulation		58.9%
HVAC		46.1%
Windows		43.8%
Appliances		27.9%
Lighting		25.1%
Roofing		20.6%
Structure		19.6%
Paints and adhesives		14.6%
Hot water systems		14.6%
Siding		13.2%
Plumbing fixtures		9.6%
Flooring		7.3%
Faucets		2.7%
Countertops		2.3%
Cabinets		2.3%
Decking		1.8%

BANG FOR THE BUCK. The top three categories reflect the industry-wide emphasis on efficient envelopes and heating and cooling technology. That doesn't mean pros don't consider the sustainability impacts of the other categories, though.

Insulation 58.9% HVAC 46.1% Windows 43.8%












How do you know if a brand is **AUTHENTIC OR GREENWASHING**?

I research the brand by using third-party sources.		62.2%
I research the brand by reviewing the company's website.		26.7%
I trust the company's claims.		5.5%
I feel it in my gut.		2.8%
I don't care if the company is greenwashing.		2.8%

I research the brand by using third-party sources 62.2%

What are the most significant factors that influence your **BRAND LOYALTY**?

(Choose your top three, in no ranking order.)

Performance		82.2%
Quality		79.9%
Price		52.5%
Warranty		24.7%
Sustainable attributes		18.7%
Brand reputation		15.1%
Design/aesthetics		11.0%
Advanced/new product features		4.6%
Consumer recommendation/preference		2.7%
Dealer/distributor recommendation		2.3%
Corporate sustainable initiatives		2.3%

Performance 82.2% Quality 79.9% Price 52.5%