

NKBA | KBIS

Sustainability in Kitchen & Bath Design

Research Report | April 2024



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Research Overview

Purpose

- + Residential construction and remodeling can have extensive impacts on the environment, the economy and society.
- + The fields of sustainability and sustainable design seek to balance the needs of these areas and minimize the negative impact of new construction and remodeling on the environment and the health and well-being of homeowners.
- + NKBA conducted this research to explore the topics of sustainability and sustainable design among designers and specifiers, to assess the current and future state of sustainability in the kitchen and bath industry from their perspective.



Objectives

- + To gather intelligence and better understand:
 - + Current perceptions of sustainable design
 - + Drivers of demand for sustainable design
 - + Elements of sustainable design most and least integrated/popular
 - + Barriers to widespread integration
 - + Future forecast for sustainable design
- + To establish a benchmark against which future progress in kitchen and bath sustainability will be measured.



Methodology

- + Sustainable design literature review
- + Qualitative interviews
- + Quantitative online survey among 309 members of the NKBA community in the U.S.
 - + Interior designers, kitchen or bath designers/specifiers, remodelers, kitchen or bath showroom pros and other similar trades



Common Definition* | Sustainable Design



Sustainable design seeks to reduce negative impacts on the environment and the health and well-being of homeowners, thereby improving the performance of the home.

The basic objectives of sustainability are to reduce the consumption of and reliance upon non-renewable resources; minimize waste, and create healthy, productive environments to meet current and future needs.

This includes but is not limited to materials selection, energy source selection, reuse of materials and eliminating use of toxic/unhealthy materials.

Executive Summary

Executive Summary | Key Insights



Build Awareness of the Importance of Sustainability

- + Although K&B designers believe that sustainability is important, **less than half are well-informed on the subject of “sustainable design.”**
- + Designers are most familiar with these sustainability practices: **Retrofitting existing spaces, sourcing domestically and recycling/repurposing old materials.**
- + They are least familiar with: **Reducing/eliminating greenhouse-gas emissions, sourcing materials requiring low energy to produce, and sourcing lightweight materials that reduce transportation impact.**
- + **Awareness of sustainable design is highest in the West Coast, Pacific Northwest and Northeast regions** due to more stringent building codes/policies.



Educate Kitchen & Bath Professionals

- + A majority of designers report **there isn't enough information available** about sustainable K&B design.
- + Armed with more information about the benefits of sustainability, **designers will be better able to influence their clients' choice** of sustainable products/practices.
- + **The best-known** sustainable design elements are **LED lighting, kitchen storage for recycling, energy-efficient appliances and water-conserving products.**
- + **Far more education is needed about smart faucets and products that contain recycled content**, as these are currently the least popular sustainable design elements.



Overcome Barriers to Adoption to Drive Demand

- + The top barriers preventing designers from integrating sustainability into their designs more often are: **homeowner buy-in, expense (the need for more affordable options), lack of knowledge about sustainable options, lack of attractive options, long payback period for sustainable options.**
- + Homeowners rarely, if ever, bring up sustainability, so **it is up to designers to lead these conversations and recommend sustainable products and practices.**
- + **Drive demand** for sustainable design by reinforcing these two value propositions — **family health/well-being and energy savings** — particularly with Millennials who are the consumer segment most interested in sustainability.



Capitalize on Sustainable Opportunities

- + Although sustainability has been slower to take root in residential construction/design, **the opportunity for future growth is undeniable.**
- + **Demand for K&B sustainable design is expected to grow in the next two years**, with more designers considering it a “must have.”
- + More **widespread integration of sustainable products and practices** will be dependent upon the following:
- + Brands' ability to create **sustainable K&B products that are practical, well-priced and attractive.**
- + Designers'/specifiers' desire to be **good stewards of the environment and purveyors of wellness** for their clients.
- + Industry's willingness to **educate designers about sustainability.**

Key Findings

Current Perceptions Of Sustainable Design

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Design: Jaque Bethke | Photo: Phil Johnson



Sustainability is currently considered moderately important to industry pros.



It is more important from a personal standpoint than a professional one.

59%

% Extremely/Very Important

Personally

51%

% Extremely/Very Important


Professionally

**Familiarity with the concept of
“sustainable design” is low
among industry pros.**

45%

% Extremely/Very Familiar



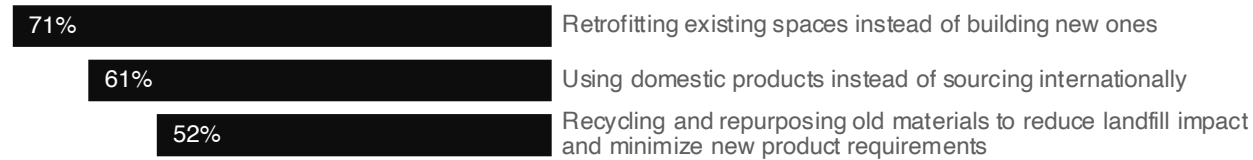


Learning about sustainability takes some time. As far as I can see, only a minority of designers are what I consider well-informed on this topic.

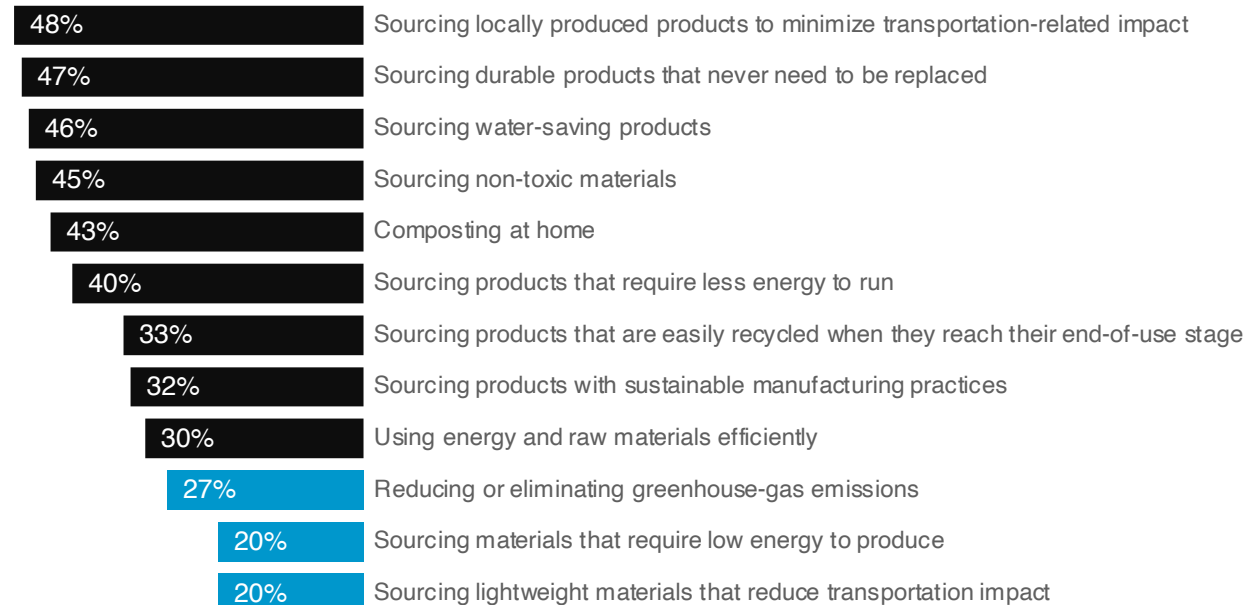
— Barbara Dornbush, Co-Founder, Eco Rooms LLC

Designers are familiar with only a few aspects of sustainable design.

Designers are **most aware of:**



Designers are **less aware of:**



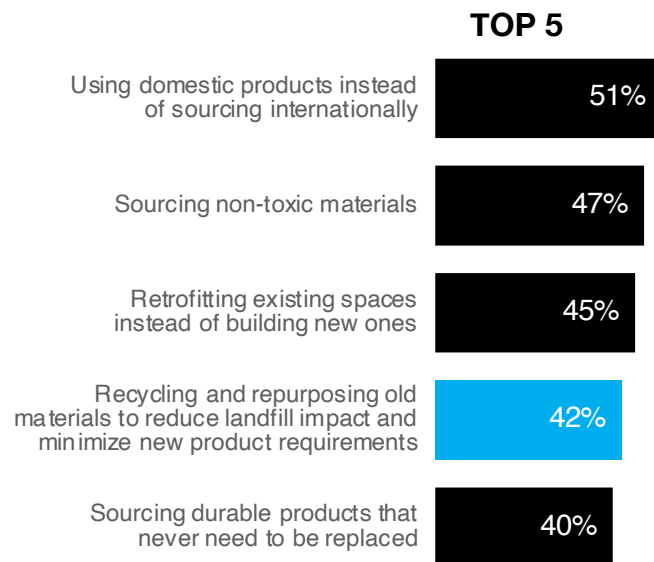
Interest in sustainable design varies by region.

- + Regions with high interest in sustainability due to stringent building codes and sustainability-focused policies are:
 - + West Coast
 - + Pacific Northwest
 - + Northeast

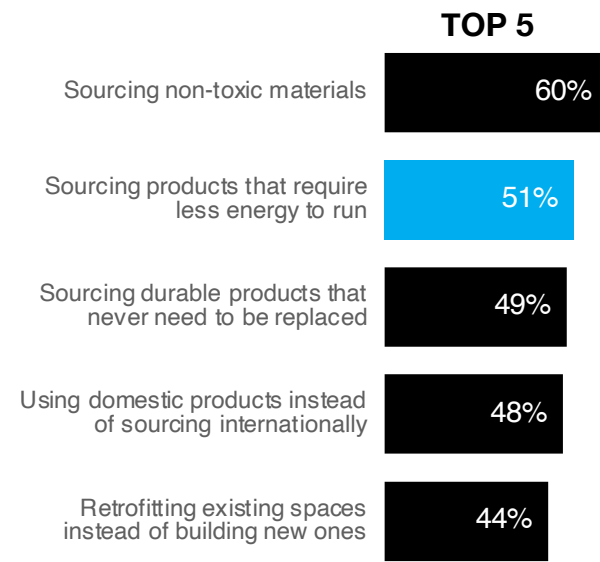


Designers and homeowners align on most important sustainable design practices...

Most important to designer/specifier



Most important to client/homeowner



■ Top 5 important practices to **BOTH** designers and homeowners

... with these two notable exceptions:

+ Recycling and repurposing old materials

+ Most important to 42% of designers vs. 27% of homeowners

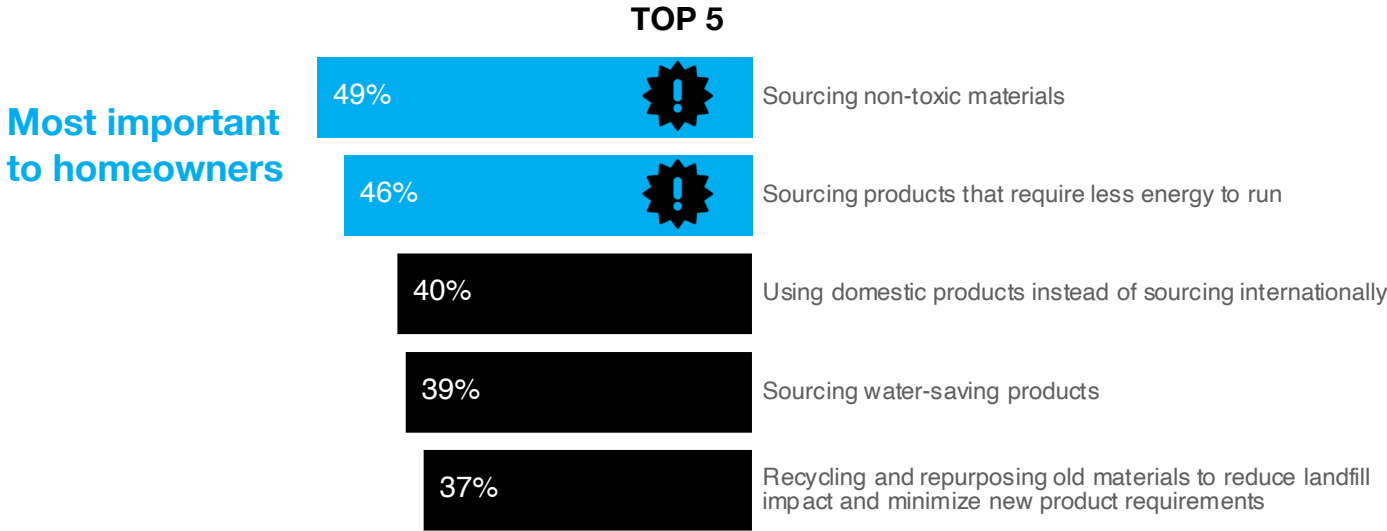
+ Sourcing products that require less energy to run

+ Most important to 51% of homeowners vs. 30% of designers



Sourcing non-toxic materials and products that require less energy are gaining the most momentum.

Sustainability practices gaining the most momentum:



Availability & Sources of Information




Information is lacking about sustainability in K&B design.

60%

of respondents say not enough information is available.





I don't think there are a lot of sources of good information for kitchen and bath out there. In fact, I'm not sure if there are any resources specific to kitchen and bath for sustainability.

— Avinash Rajagopal, Editor in Chief, Metropolis Magazine

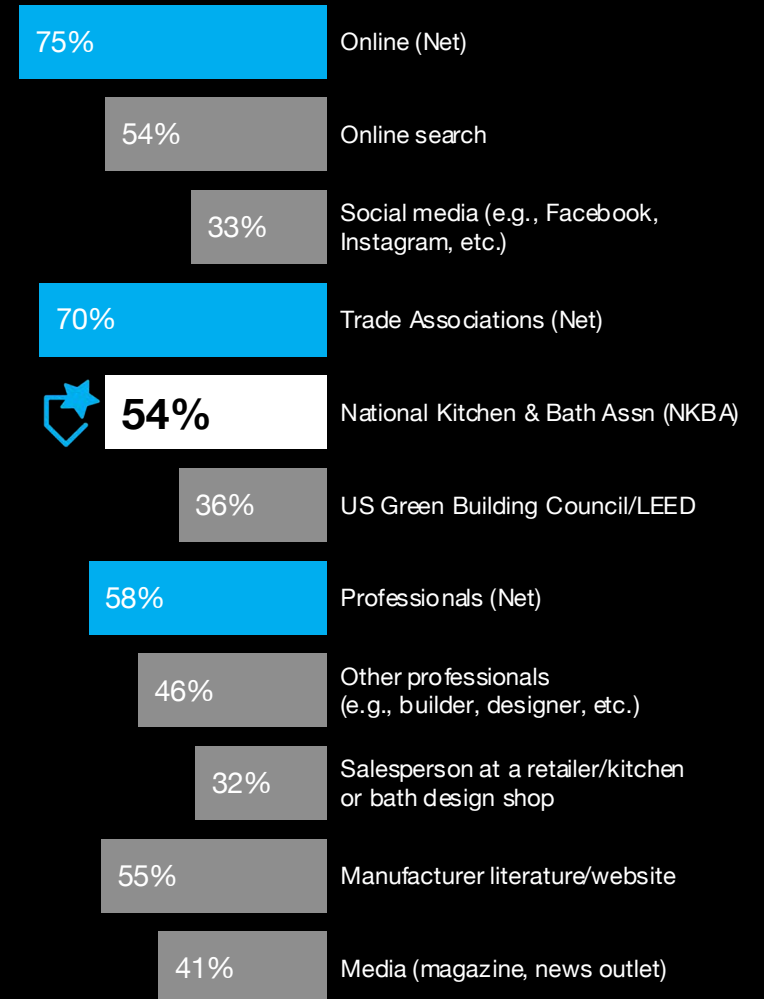
Designers/specifiers rely on a variety of sources to learn about sustainability.

+ Top Sources for Sustainability Info:

- + Online searches/social media
- + Trade associations
- + Industry professionals
- + Manufacturers

+ Education will increase perceived importance of sustainable design among industry pros, which in turn will increase their influence among homeowners.

Information Sources



Drivers of Demand for Sustainable Design



Demand for sustainability in kitchen and bath design has been on the rise over the past two years.

Kitchen Design

52%

of respondents say demand for sustainability in **Kitchen Design** has increased over the past two years.

Bath Design

47%

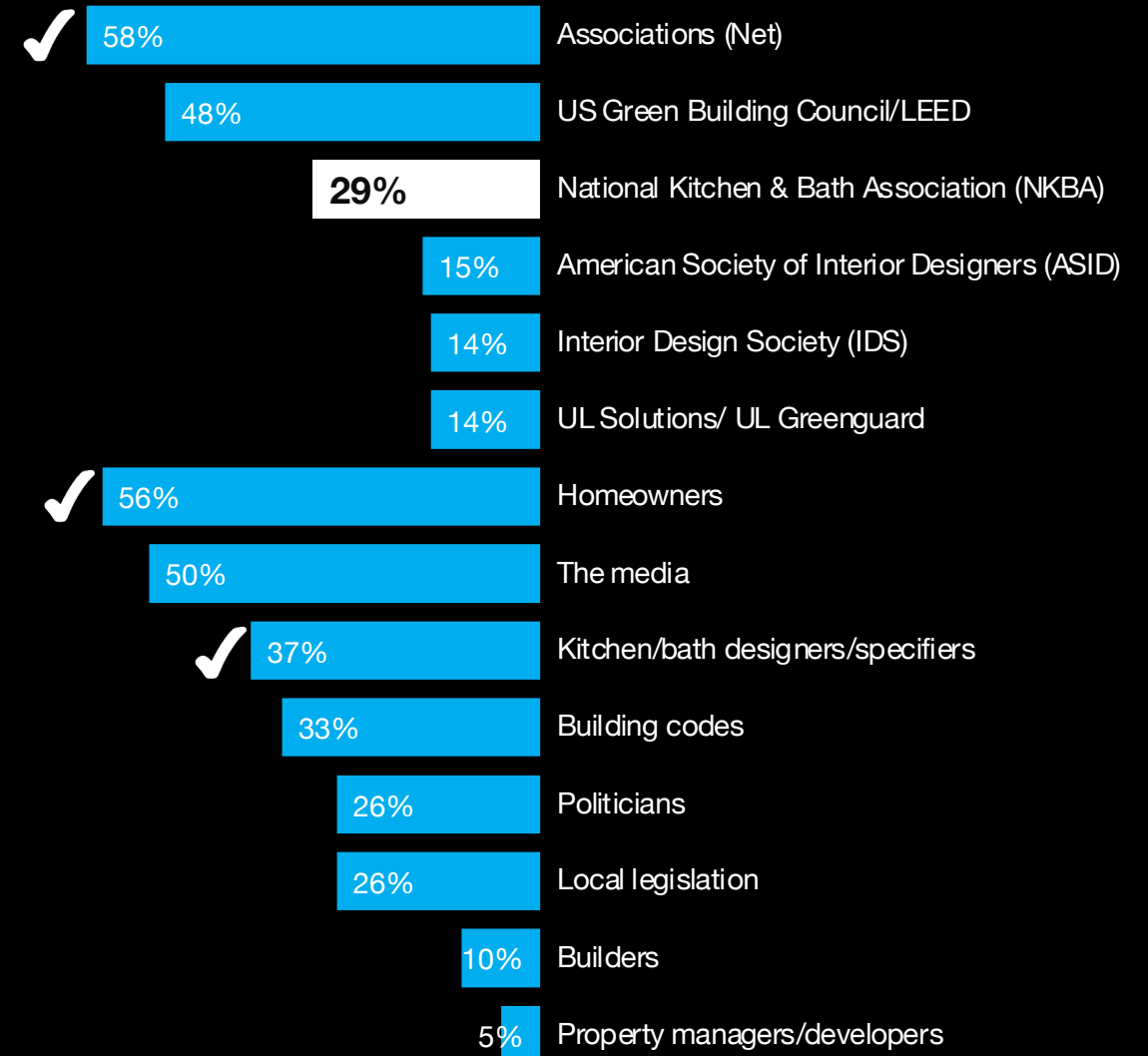
of respondents say demand for sustainability in **Bath Design** has increased over the past two years.

Who drives demand for sustainable design?

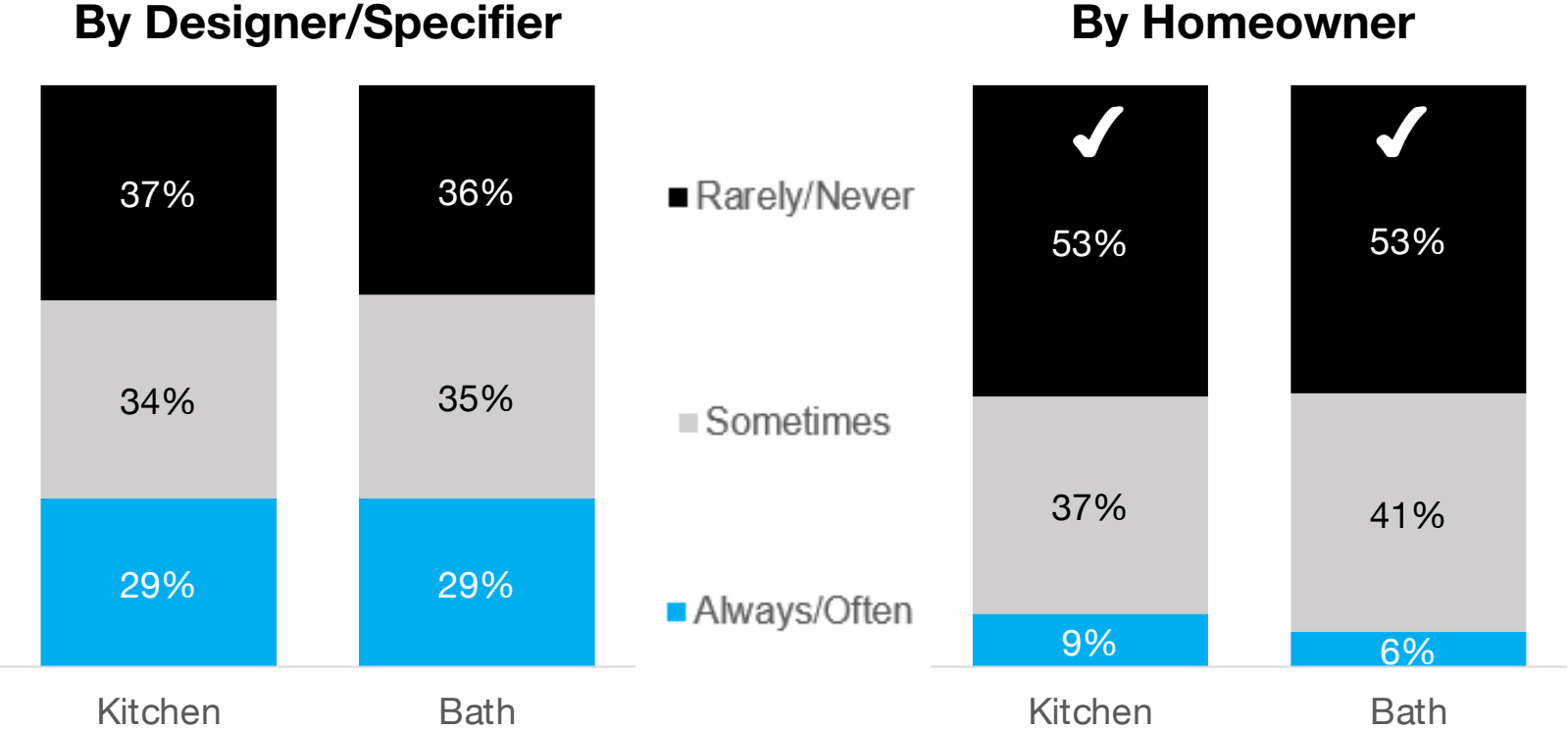
- + Associations are key drivers of demand
 - + **US Green Building Council/ LEED** is seen as the most influential.


- + **Homeowners** also drive demand, but **designers/specifiers** claim that they, themselves, have limited influence over their clients' sustainability decisions
 - + Just **23%** of designers say their perspectives on sustainability were **extremely/very influential** in terms of homeowners' end results.

Who/ what is driving demand for sustainable design in K&B projects?



Homeowners rarely bring up sustainability, so it is up to designers to lead these conversations.

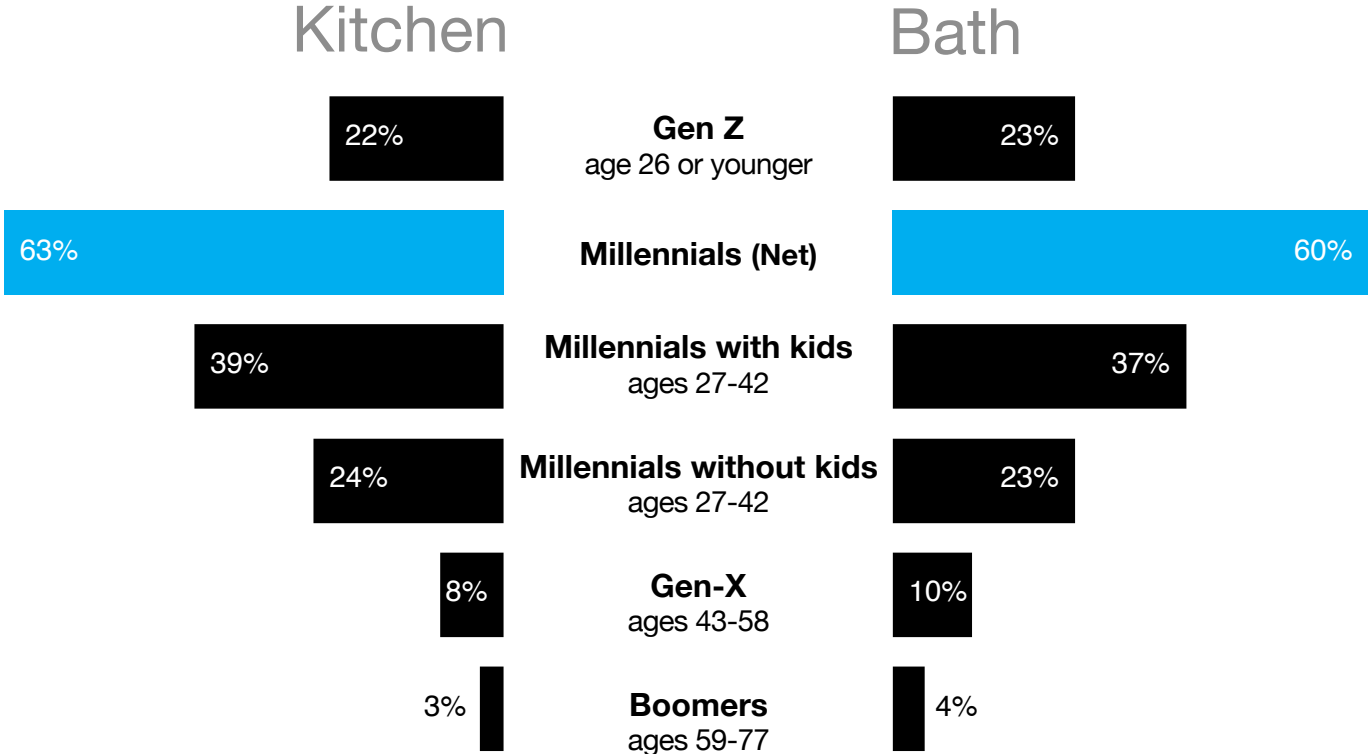




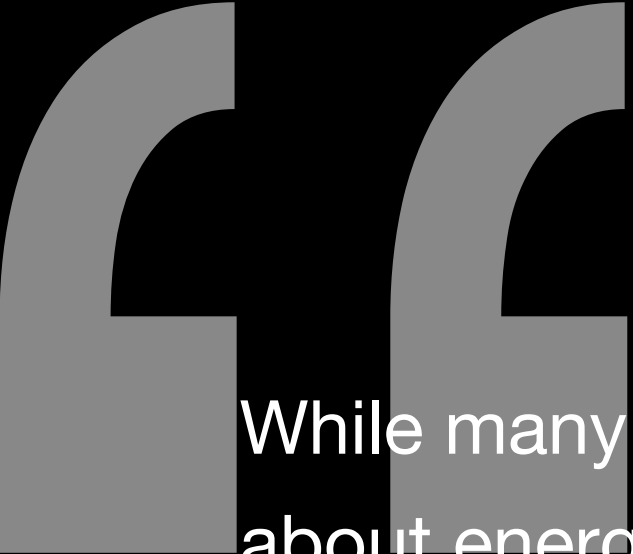
As designers and participants in the built environment, it's our job to do the right thing. Let's not specify things that will be bad for energy usage, or off-gas to affect the client's use of the space.

— John Cialone, FASID, NCIDQ, Tom Stringer Design Partners

Millennials are the consumer segment most interested in sustainable design in their kitchens and baths.



(Percent interested in including sustainable design elements in their kitchens or baths)



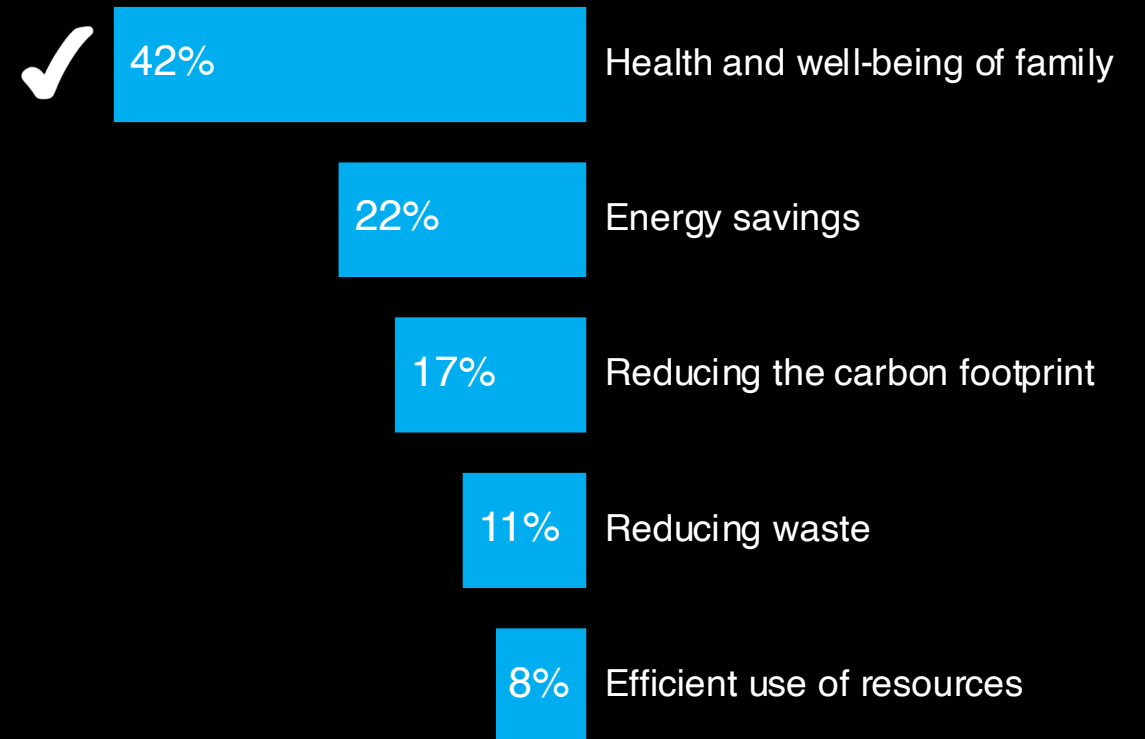
While many homeowners and builders are concerned about energy costs, one of the primary drivers of sustainable design for individual homeowners is the health and well-being of their families.

— Avinash Rajagopal, Editor in Chief, Metropolis Magazine

Family health and well-being is homeowners' sweet spot.

+ Promoting the top end benefit of sustainability—**health and well-being of the family**—is key to driving demand for sustainability among homeowners.

Most Important End Benefits of Sustainability



Elements of Sustainable Design Most and Least Integrated



Sustainable design is being integrated, but slowly.

Frequency of integrating vs. 2 years ago:

48%

(% integrating sustainable solutions
SOMEWHAT MORE than 2 years ago)

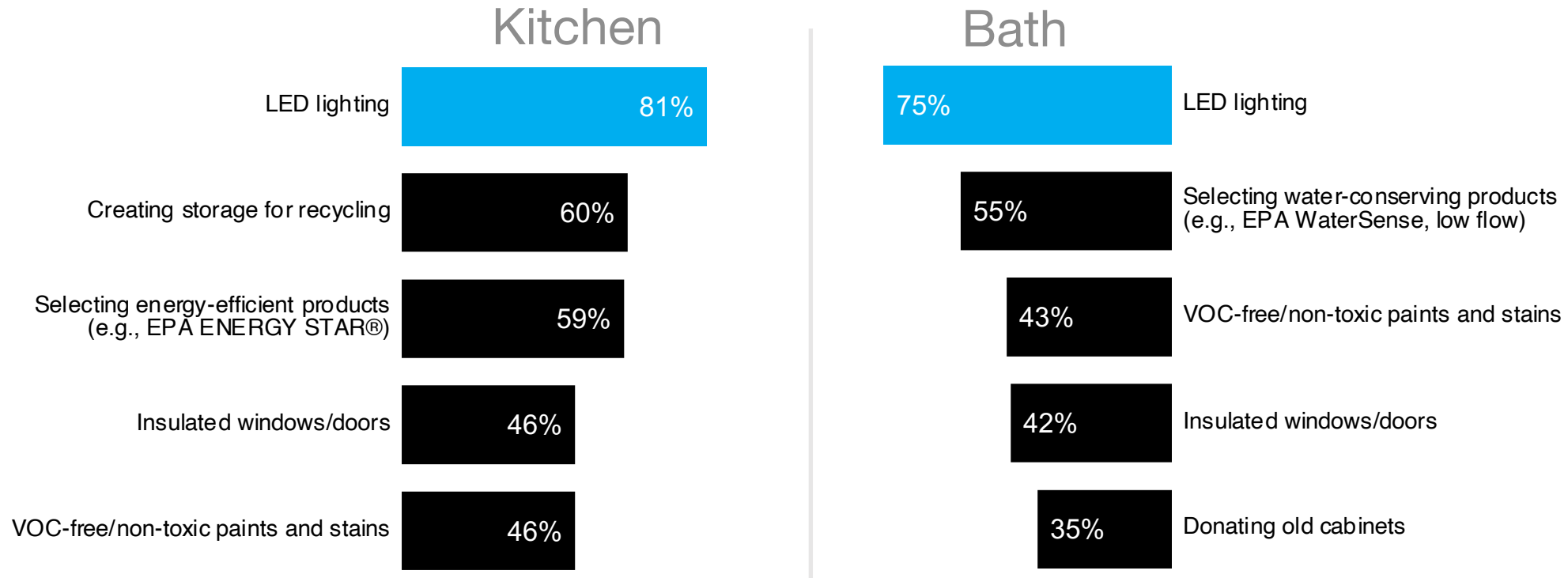
10%

(% integrating sustainable solutions
MUCH MORE than 2 years ago)

Basic sustainable elements are most popular for kitchen and baths, led by LED lighting.

Top 5 Elements of Sustainable Design

(% Integrate Always/Often)

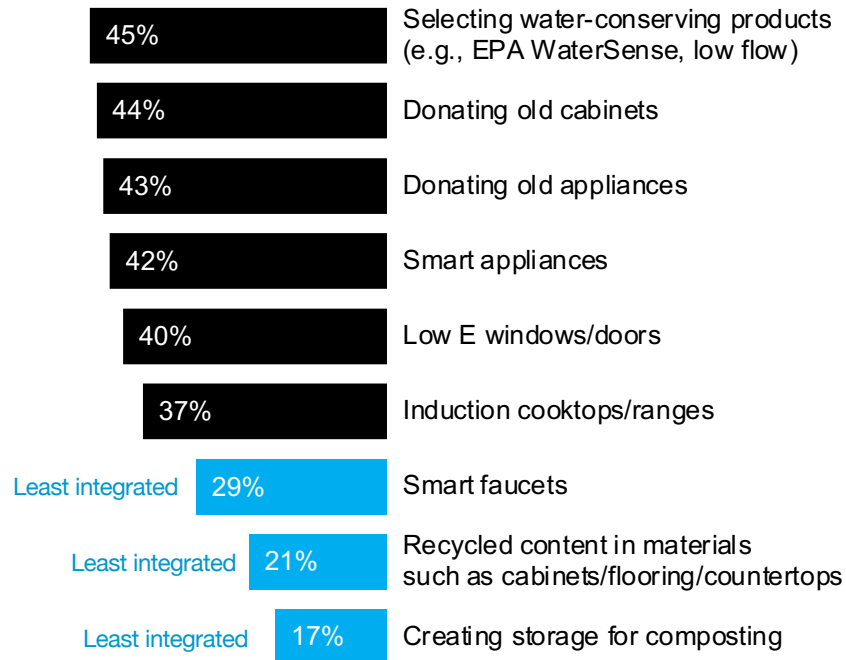


Designers are integrating more advanced elements of sustainable design at a much slower rate.

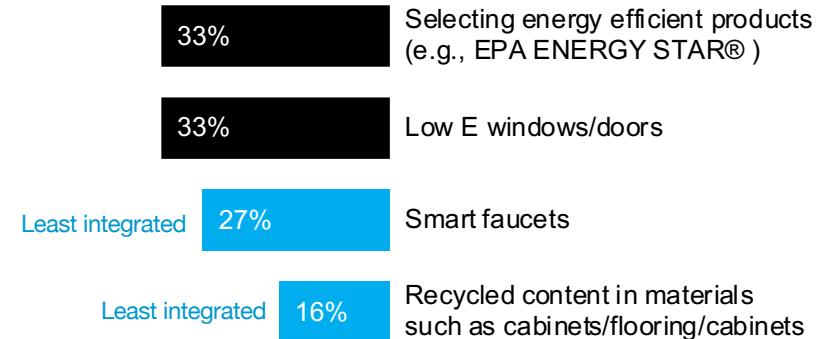
Less Popular Elements of Sustainable Design

(% Integrate Always/Often)

Kitchen Projects



Bath Projects



Homeowner buy-in is the top barrier to integration due to cost, lack of information and skepticism about benefits.

Barriers to Integration



SMEs identify additional barriers to the continued integration of sustainability in the K&B industry:

- + Lack of specific and credible resources for information;
- + Need for more attractive yet practical sustainable products;
- + Resistance from companies and manufacturers due to profit motives.

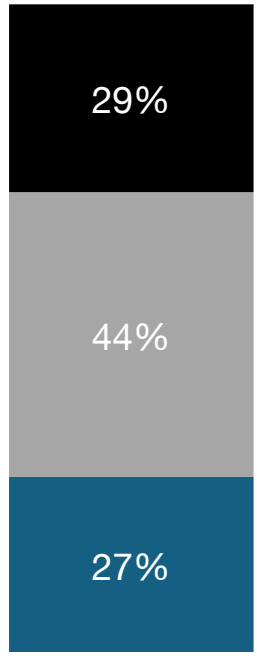


Manufacturer Influence

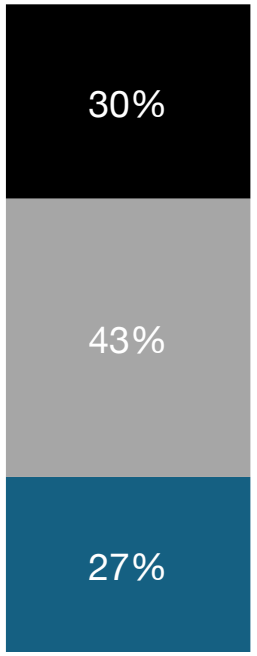


Manufacturers' sustainability practices are not often considered in product recommendations.

Kitchen Projects



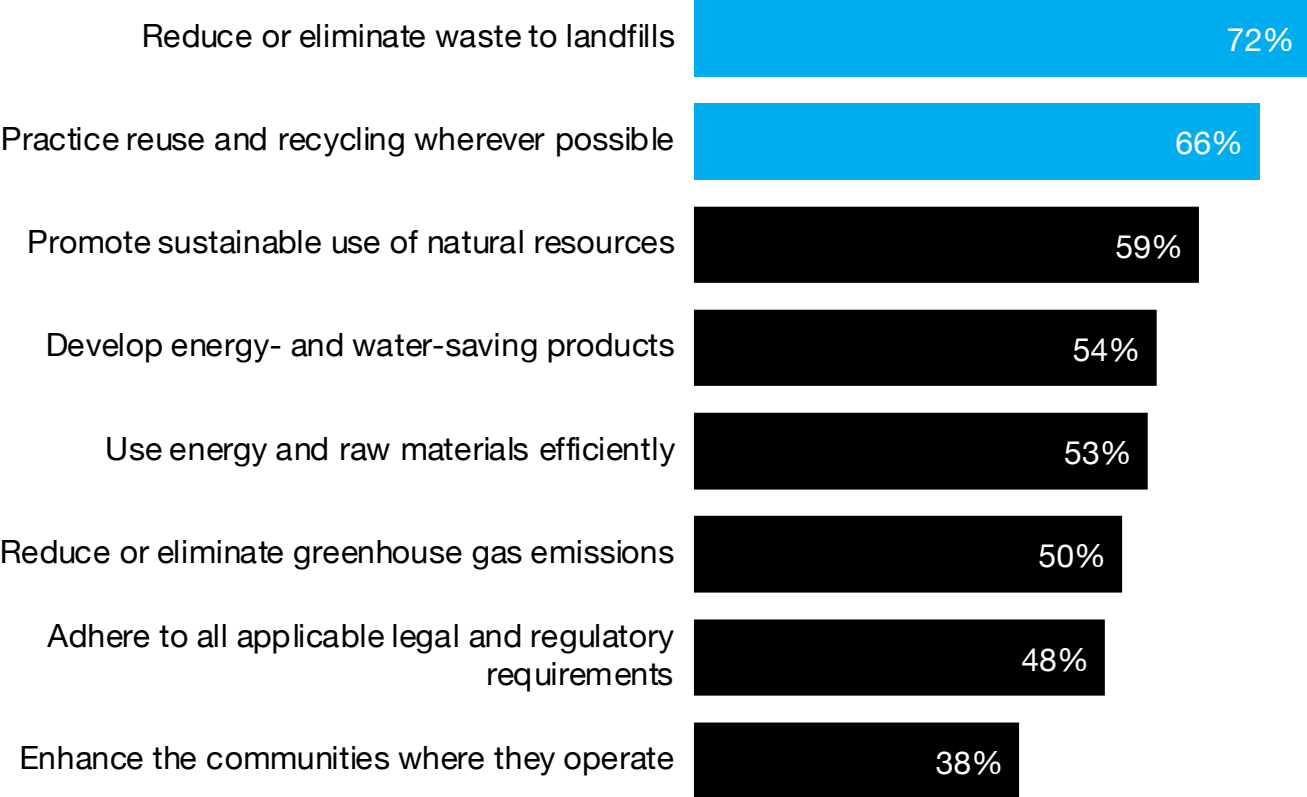
Bath Projects




- Rarely/Never
- Sometimes
- Always/Often



Reducing waste and reusing/recycling are the manufacturing practices most important to designers.





If brands create products that are practical, well-priced, usable, sustainable, and attractive, form will follow function. Sustainability will become an integral part of design, rather than something that is so unique and unusual that people will not adopt it.

— Sharon L. Sherman, ASID, CKD, CID, NCIDQ, Founder, Thyme & Place Design

Literature Review | Insights for Brands

- + Three factors are driving us toward a **major shift in consumption patterns where consumers will consider sustainability as a baseline requirement for purchase**:
 - + Trust drives behavior and, ultimately, business outcomes;
 - + Sustainability promotes trust, particularly among younger generations;
 - + Younger generations will soon have most of the purchasing power in the U.S.
- + When Gen Z and Millennial customers believe a brand cares about its impact on people and the planet, they are **27% more likely to purchase it than older generations** are — a clear measure of sustainability's power to drive buying decisions in this group.
- + **The purchasing power of Millennials and Gen Z will surpass that of Boomers around 2030**, with up to \$68 trillion in wealth transferring from Boomers to these younger generations by the end of this decade. To earn these younger consumers' trust, it's clear that brands' sustainability efforts must deliver on humanity and transparency.
- + **Companies that understand these trends — and create truly sustainable brands that make good on their promises to people and the planet — will seize advantage from brands that make flimsy claims or have not invested sufficiently in sustainability.**

Sustainable Design Outlook



Demand for sustainability in kitchen and bath design is expected to grow in the next two years.

Kitchen Design

72%

of respondents say demand for sustainability in **Kitchen Design** will increase in next two years.

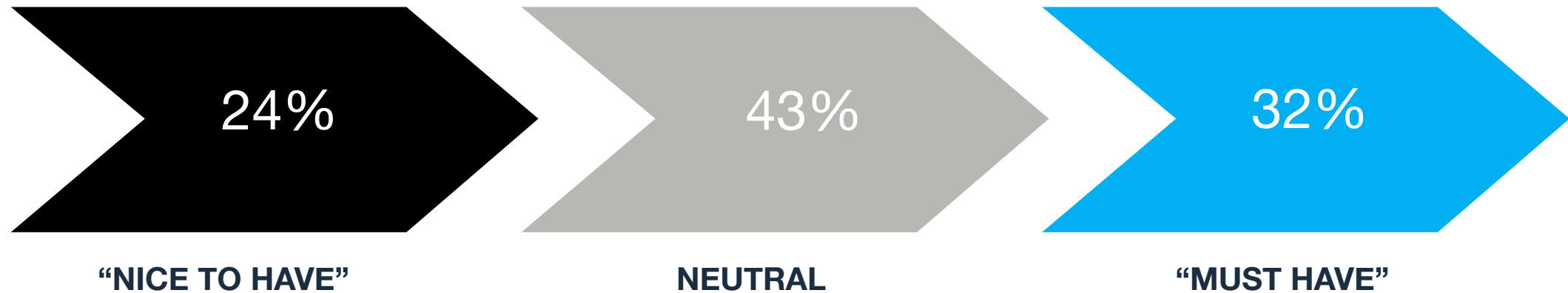
Bath Design

70%

of respondents say demand for sustainability in **Bath Design** will increase in next two years.

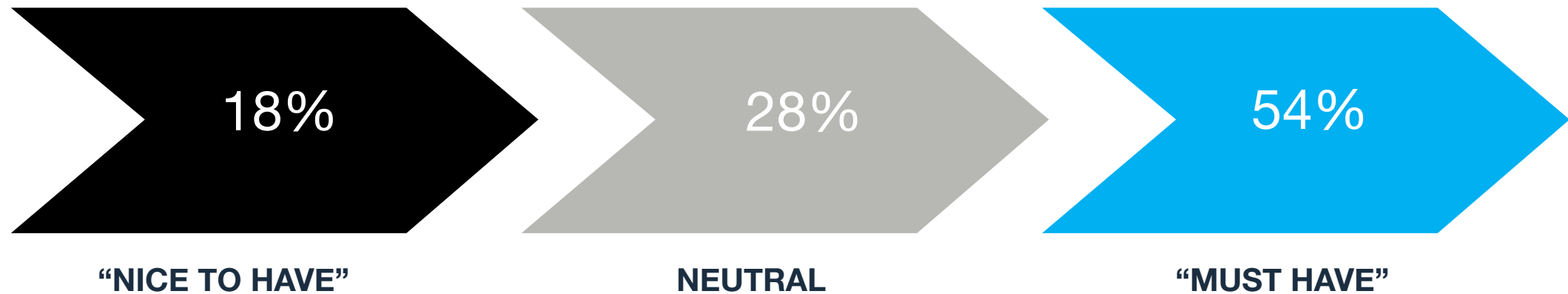
Currently, just one-third of designers feel sustainable design is a “must have.”

Current Opinions



In the next few years, designers expect their opinions to shift, with more than half feeling sustainable design will be a “must have.”

Future Opinions



Growth of sustainable design will be dependent on these factors

- + Increased **consumer awareness and demand** for health and well-being, resource efficiency and energy savings
- + **Younger generations being more generally aware, interested and knowledgeable** about sustainability and sustainable design
- + Designers' motivation to reduce waste in the industry
- + Designers' view that they are the “**purveyors of wellness**” for their clients
- + **Economic factors**, including energy cost considerations by homeowners and property managers/developers
- + Manufacturers' ability to **provide more attractive yet practical sustainable products** which are competitively priced



Appendix

Respondent Profile

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Design: Elizabeth-Lord-Levitt | Photo: MG Photography



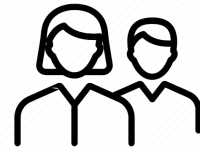
RESPONDENT PROFILE

TRADE SECTOR



- 56% K&B designer
- 31% Interior designer
- 26% Showroom pro
- 20% Remodeler
- 13% K&B specifier

COMPANY SIZE



- 36% Small (1-4)*
- 18% Medium (5-9)*
- 46% Large (10+)*

* Number of employees

EDUCATION



- 34% < College Grad
- 51% College Grad
- 15% Advanced Degree

US REGION



- 36% West
- 24% South
- 22% Midwest
- 18% Northeast

GENDER



- 72% Female
- 26% Male
- 2% Prefer Not to Answer

AGE



49
Avg. years old

Literature Review: Additional Findings



Secondary research provides more detail regarding barriers to integration.

+ Top reasons companies (builders/remodelers) have not done more green building:*

- + Lack of customer demand (77%, 79% respectively);
- + Too expensive (52%, 30%).

+ Economic barriers:**

- + Clients often prefer instant rather than long-term savings;
- + Cost is seen as a primary obstacle to sustainable building and the likelihood of using sustainable design on a given project is correlated with its magnitude.

+ Attitude and market barriers:**

- + Designer/specifier responsibility: To encourage sustainable design, but not all are enthusiastic, they prefer to stick to established practices because doing so will save time and energy;
- + Clients: Some research has shown that consumers exhibit skepticism regarding the concept of sustainability, and many question whether it would improve their health, comfort or quality of life in any way.

+ Information barriers:**

- + Information, knowledge and awareness — lack of understanding among industry pros and consumers;
- + Technology and training barriers: Practitioners (e.g., builders, subcontractors, general labor force) lack knowledge, experience and access to relevant and dependable technology.

Secondary research provides more detail regarding consumers' sustainability needs.

- + Three factors are driving us toward a **major shift in consumption patterns where consumers will consider sustainability as a baseline requirement for purchase**:
 - + Trust drives behavior and, ultimately, business outcomes
 - + Sustainability promotes trust, particularly among younger generations
 - + Younger generations will soon have most of the purchasing power in the U.S.
- + **Sustainability promotes trust, particularly among younger generations.**
 - + While both younger and older consumers care about brands' competence (their quality and consistency), younger consumers' trust in brands — and their resulting purchasing behavior — is much more strongly influenced by the brands' positive intent. When Gen Z and Millennial customers believe a brand cares about its impact on people and the planet, they are 27% more likely to purchase it than older generations are — a clear measure of sustainability's power to drive buying decisions in this group.
- + **Younger generations will soon have most of the purchasing power in the US.**
 - + Forecasting experts calculate that the purchasing power of Millennials and Gen Z will surpass that of Boomers around 2030, with up to \$68 trillion in wealth transferring from Boomers to these younger generations by the end of this decade. To earn these younger consumers' trust, it's clear that brands' sustainability efforts must deliver on humanity and transparency.
- + Companies that understand these trends — and create truly sustainable brands that make good on their promises to people and the planet — **will seize advantage from brands that make flimsy claims or have not invested sufficiently in sustainability.**

Qualitative Findings



Subject Matter Expert Summary

- + **A number of factors are driving the demand for sustainable design such as:**

- + Increased **consumer demand and awareness** for health and well-being, resource efficiency and energy savings;
- + **Designers' motivation** to reduce waste and view that they are the “purveyors of wellness” for clients;
- + **Economic factors**, including energy cost considerations by homeowners and property managers/developers;
- + **Younger generations** being more generally aware, interested and knowledgeable about sustainability and sustainable design.

- + **Current sustainable design trends gaining the most traction include:**

- + **Use of sustainable products** such as countertops and flooring and **non-toxic materials** including finishes, paints and non-formaldehyde products;
- + Incorporation of **energy-efficient products** and appliances in K&B designs, as well as LED lighting;
- + Focus on **water conservation and optimization** in kitchen and bath designs;
- + Preference for **locally sourced materials** to reduce transportation impact;
- + Trend toward **retrofitting existing spaces** instead of building new ones;
- + Increasing importance placed on **responsible sourcing**, particularly using domestic products.

Subject Matter Expert Summary *(continued)*

- + Most believe **interest in sustainable design varies by region**, with the West Coast, Pacific Northwest and Northeast highlighted as regions with high interest due to stringent building codes and sustainability-focused policies.
- + One barrier to integration is the **lack of credible sources of information** about sustainable design for kitchen and bath designers; the NKBA, however, is mentioned as an existing valuable source of information, and all believe there is a need to expand upon what little information is available.
- + While sustainable design in the kitchen and bath is not yet mainstream, most agree that increasing awareness will lead to a shift of it **becoming part of the baseline** rather than an optional upgrade.
- + Respondents feel if sustainable design is practical, well-priced, usable, attractive and seamlessly integrated into daily life, **it will become more central to the industry**.
- + **Additional barriers to the continued integration of sustainability** include the need for more attractive yet practical sustainable products, and resistance from companies and manufacturers due to profit motives.

Sustainability in Kitchen & Bath Design

All NKBA market research reports are available at [nkba.org/research](https://www.nkba.org/research).

The NKBA is the not-for-profit trade association that owns the Kitchen & Bath Industry Show® (KBIS), as part of Design & Construction Week® (DCW). With nearly 50,000 members in all segments of the kitchen and bath design and remodeling industry, the NKBA has educated and led the industry since the association's founding in 1963.

The NKBA's mission is to inspire, lead and empower the kitchen and bath industry through the creations of certifications, specialty badges, events and summits, research and community. The NKBA envisions a world where everyone enjoys safe, beautiful and functional kitchen and bath spaces.

For more information, visit [nkba.org](https://www.nkba.org) or email us at info@nkba.org.



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