



Remodeling Market Index

Special Questions on Aging-in-Place

Economics & Housing Policy Group

Exhibit 1. Is your company involved in home modification work related to Aging-in-Place?
(Percent of Respondents)

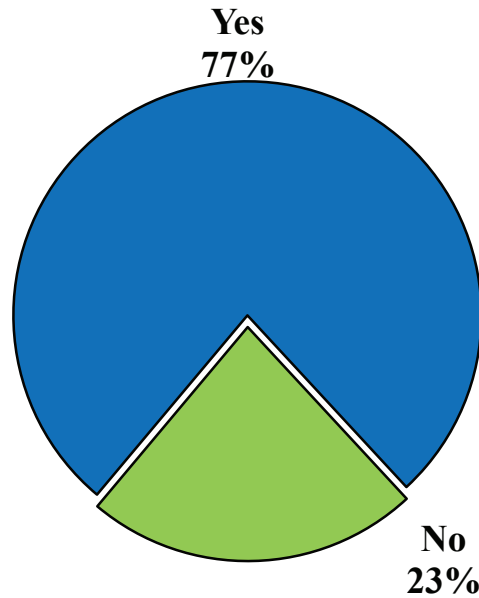


Exhibit 2. Is your company involved in home modification work related to Aging-in-Place?
REGIONAL BREAKDOWN
(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Yes	77%	74%	80%	75%	80%
No	23	26	20	25	20
Responses	269	35	74	100	60

Exhibit 3. Is your company involved in home modification work related to Aging-in-Place?
HISTORY
(Percent of Respondents)

	4th Qtr 2004	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Yes	61%	60%	72%	70%	68%	72%	80%	77%
No	39	40	28	30	32	28	20	23
Responses	453	382	378	488	462	375	279	269

Exhibit 4. What are the age groups of homeowners for which you are doing Aging-in-Place work?
(Check all that apply)
(Percent of Respondents)

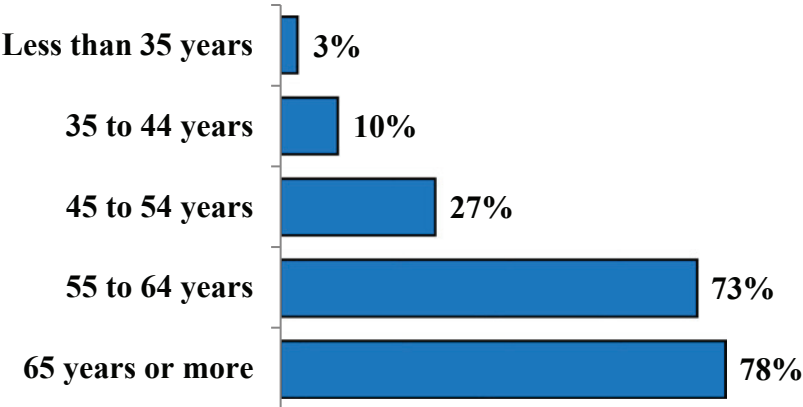


Exhibit 5. What are the age groups of homeowners for which you are doing Aging-in-Place work?
REGIONAL BREAKDOWN
(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Less than 35 years	3%	0%	2%	3%	6%
35 to 44 years	10	7	8	10	14
45 to 54 years	27	18	28	25	32
55 to 64 years	73	71	81	75	62
65 years or more	78	61	84	76	82
Responses	221	28	64	79	50

Exhibit 6. What are the age groups of homeowners for which you are doing Aging-in-Place work?
HISTORY
(Percent of Respondents)

	4th Qtr 2004	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Less than 35 years	NA	5%	2%	3%	3%	3%	4%	3%
35 to 44 years	NA	17	12	7	6	6	7	10
45 to 54 years	20%	43	27	26	23	22	22	27
55 to 64 years	71	76	69	65	67	73	76	73
65 years or more	62	67	59	59	63	72	76	78
Responses	458	254	283	361	339	289	234	221

Exhibit 7. Do you find that most, some or none of the consumers seem to be familiar with Aging-in-Place concept?

(Percent of Respondents)

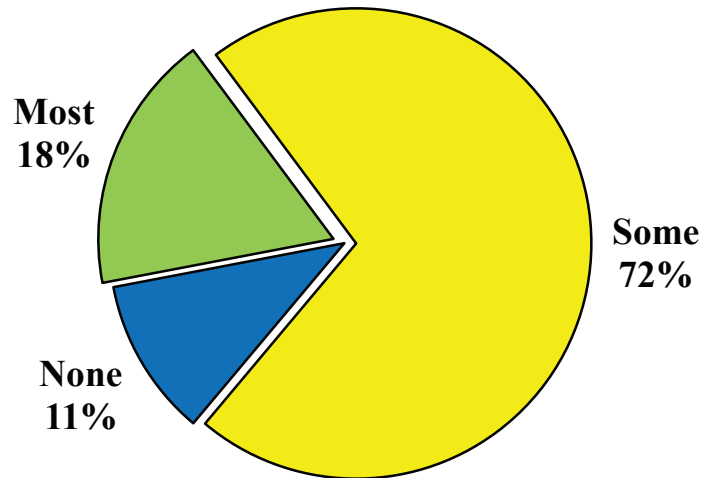


Exhibit 8. Do you find that most, some or none of the consumers seem to be familiar with Aging-in-Place concept?

REGIONAL BREAKDOWN

(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Most	18%	21%	14%	18%	20%
Some	72	58	76	72	73
None	11	21	10	10	7
Responses	257	33	72	96	56

Exhibit 9. Do you find that most, some or none of the consumers seem to be familiar with Aging-in-Place concept?

HISTORY

(Percent of Respondents)

	4th Qtr 2004	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Most	6%	8%	14%	9%	9%	11%	17%	18%
Some	69	70	68	75	74	77	72	72
None	25	23	18	16	18	12	11	11
Responses	351	317	332	431	408	334	255	257

**Exhibit 10. Please check the type of Aging-in-Place remodeling projects your company has done in the past 12 months.
(Check all that apply)
(Percent of Respondents)**

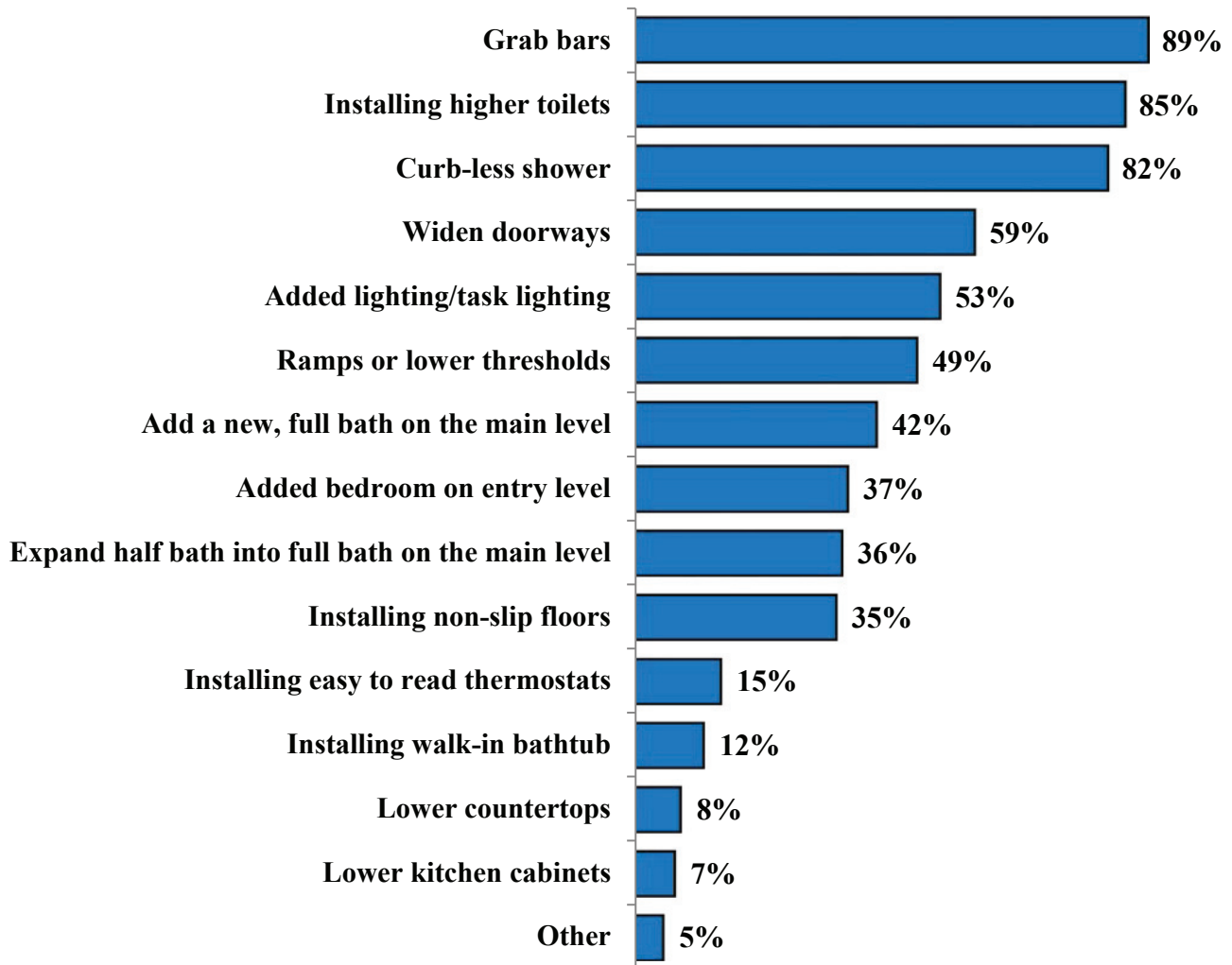


Exhibit 11. Please check the type of Aging-in-Place remodeling projects your company has done in the past 12
REGIONAL BREAKDOWN
(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Grab bars	89%	86%	92%	89%	86%
Installing higher toilets	85	79	86	83	88
Curb-less shower	82	79	82	80	88
Widen doorways	59	64	67	57	49
Added lighting/task lighting	53	50	58	51	53
Ramps or lower thresholds	49	64	47	41	55
Add a new, full bath on the main level	42	54	35	44	39
Added bedroom on entry level	37	39	38	41	27
Expand half bath into full bath on the main level	36	39	36	32	39
Installing non-slip floors	35	36	35	31	41
Installing easy to read thermostats	15	7	14	14	24
Installing walk-in bathtub	12	11	8	12	20
Lower countertops	8	11	5	6	12
Lower kitchen cabinets	7	4	5	7	10
Other	5	0	6	5	6
Responses	226	28	66	81	51

Exhibit 12. Please check the type of Aging-in-Place remodeling projects your company has done in the past 12 months.

HISTORY

(Percent of Respondents)

	4th Qtr 2004	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Grab bars	91%	89%	90%	78%	80%	87%	94%	89%
Installing higher toilets	68	73	75	71	78	81	82	85
Curb-less shower	54	55	63	60	59	70	79	82
Widen doorways	58	58	56	57	55	58	63	59
Added lighting/task lighting	48	44	47	45	42	46	58	53
Ramps or lower thresholds	54	49	50	45	46	51	49	49
Add a new, full bath on the main level							38	42
Added bedroom on entry level	42	38	39	33	21	34	33	37
Expand half bath into full bath on the main level							30	36
Installing non-slip floors	24	21	30	20	20	26	33	35
Installing easy to read thermostats	12	10	11	13	11	12	13	15
Installing walk-in bathtub	NA	NA	NA	NA	12	14	15	12
Lower countertops							11	8
Lower kitchen cabinets							10	7
Other	12	6	9	11	5	6	3	5
Responses	279	270	302	384	347	301	234	226

Exhibit 13. What kind of increase in requests for Aging-in-Place features have you observed in the past 5 years?

(Percent of Respondents)

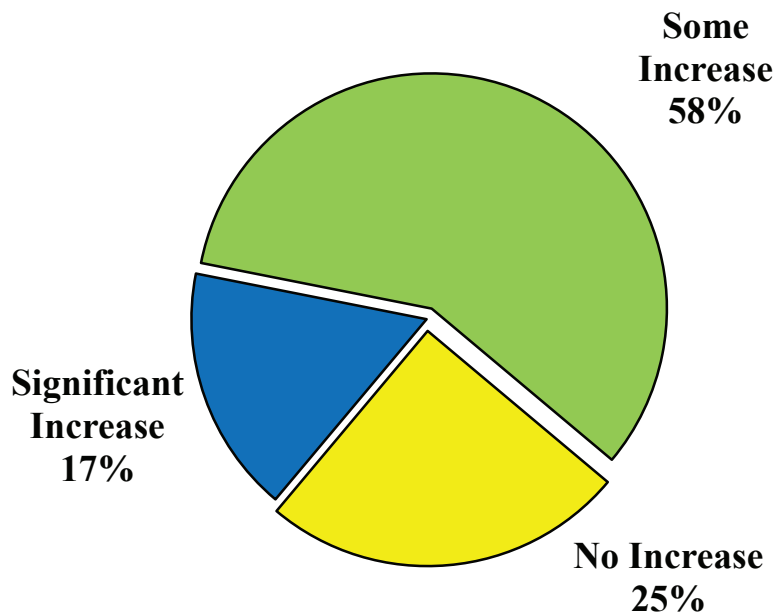


Exhibit 14. What kind of increase in requests for Aging-in-Place features have you observed in the past 5 years?

REGIONAL BREAKDOWN

(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Significant Increase	17%	17%	22%	10%	24%
Some Increase	58	57	55	66	47
No Increase	25	27	23	24	29
Responses	245	30	69	91	55

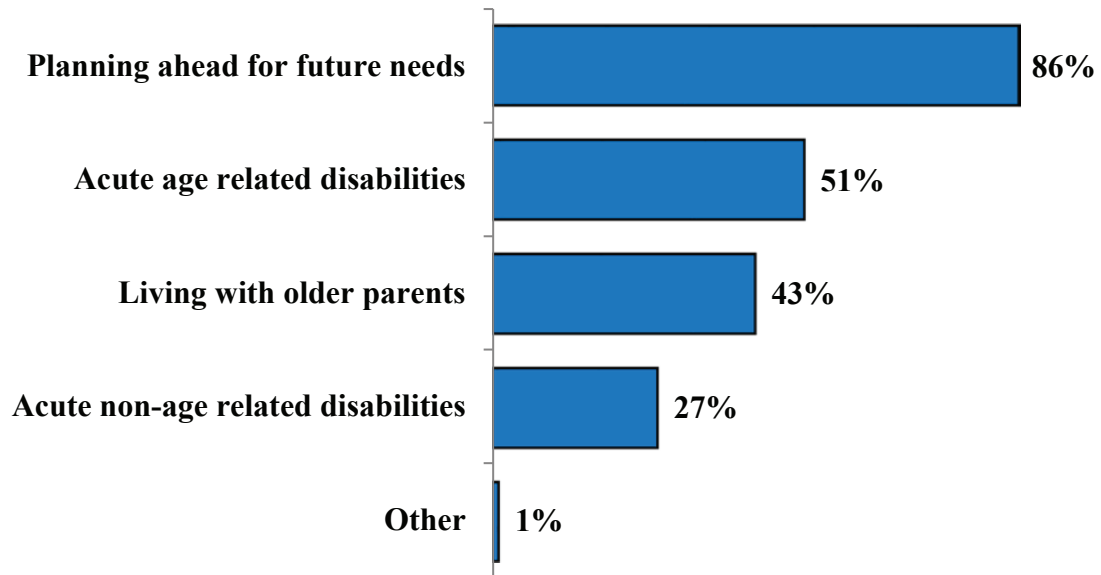
Exhibit 15. What kind of increase in requests for Aging-in-Place features have you observed in the past 5 years?

HISTORY

(Percent of Respondents)

	4th Qtr 2004	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Significant Increase	14%	12%	10%	9%	7%	9%	13%	17%
Some Increase	61	63	66	65	65	68	64	58
No Increase	25	26	24	26	27	23	23	25
Responses	338	305	326	424	388	321	248	245

**Exhibit 16. What are the reasons for your customers to undertake Aging-in-Place work?
(Check all that apply)**



**Exhibit 17. What are the reasons for your customers to undertake Aging-in-Place
REGIONAL BREAKDOWN
(Percent of Respondents)**

	Total	Northeast	Midwest	South	West
Planning ahead for future needs	86%	93%	88%	79%	88%
Acute age related disabilities	51	43	56	46	56
Living with older parents	43	46	31	49	46
Acute non-age related disabilities	27	14	29	24	34
Other	1	0	0	4	0
Responses	228	28	68	82	50

Exhibit 18. What are the reasons for your customers to undertake Aging-in-Place?

HISTORY

(Percent of Respondents)

	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Planning ahead for future needs	75%	78%	70%	68%	79%	83%	86%
Acute age related disabilities	46	42	40	44	46	49	51
Living with older parents	53	54	43	42	47	42	43
Acute non-age related disabilities	23	26	24	24	26	26	27
Other	1	3	4	4	3	2	1
Responses	305	326	424	388	321	234	228

Exhibit 19. Is the majority of your Aging-in-Place work determined by your client or suggested by the contractor?

(Percent of Respondents)

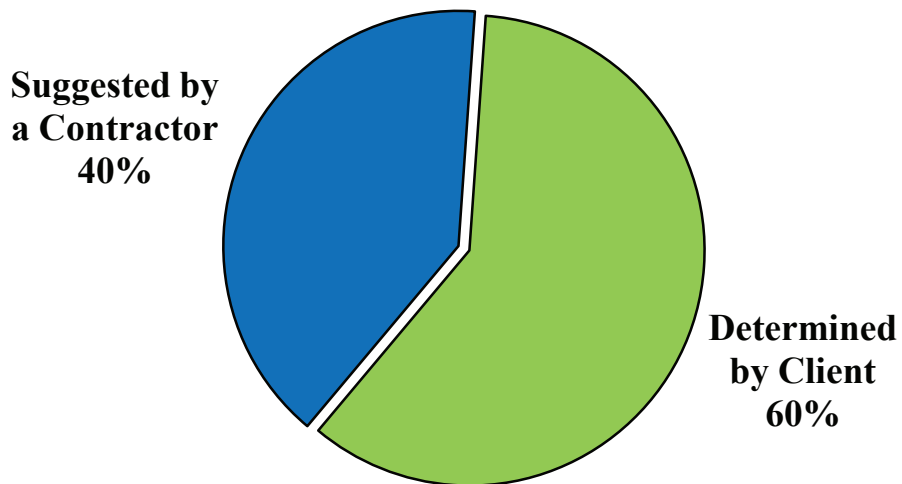


Exhibit 20. Is the majority of your Aging-in-Place work determined by your client or suggested by the contractor

REGIONAL BREAKDOWN

(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Determined by Client	60%	55%	60%	67%	52%
Suggested by a Contractor	40	45	40	33	48
Responses	233	29	70	82	52

Exhibit 21. Is the majority of your Aging-in-Place work determined by your client or suggested by the contractor?

HISTORY

(Percent of Respondents)

	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Determined by Client	66%	67%	58%	61%	59%	55%	60%
Suggested by a Contractor	34	33	42	39	41	45	40
Responses	274	309	393	360	304	237	233

Exhibit 22. How receptive are potential clients to incorporating your suggested Aging-in-Place modifications?

(Percent of Respondents)

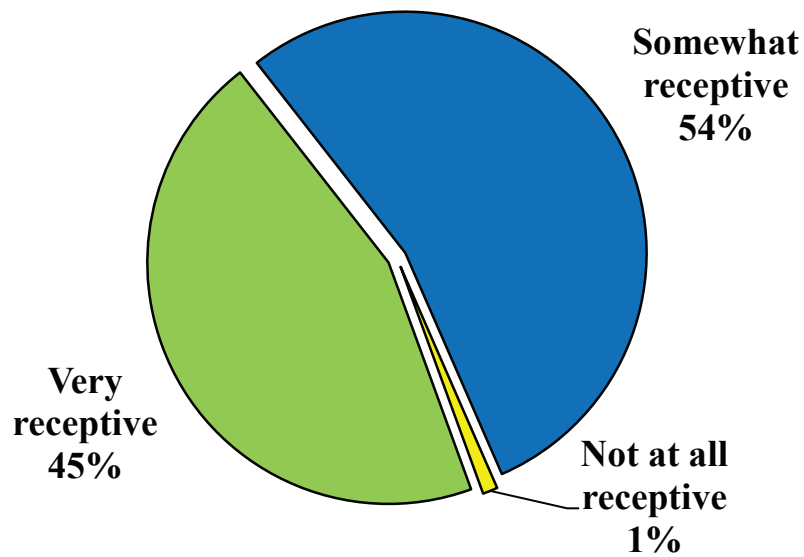


Exhibit 23. How receptive are potential clients to incorporating your suggested Aging-in-Place modifications?

REGIONAL BREAKDOWN

(Percent of Respondents)

	Total	Northeast	Midwest	South	West
Very receptive	45%	54%	42%	42%	51%
Somewhat receptive	54	46	58	57	47
Not at all receptive	1			1	2
Responses	233	28	69	83	53

Exhibit 24. How receptive are potential clients to incorporating your suggested Aging-in-Place modifications?

HISTORY

(Percent of Respondents)

	2nd Qtr 2006	2nd Qtr 2007	4th Qtr 2008	4th Qtr 2010	2nd Qtr 2013	4th Qtr 2016	4th Qtr 2018
Very receptive	40%	38%	36%	35%	41%	46%	45%
Somewhat receptive	56	59	61	63	57	51	54
Not at all receptive	4	3	3	2	2	3	1
Responses	278	302	388	357	303	237	233

Fourth Quarter 2018 – Special Questions

4. Is your company involved in home modification work relating to Aging-in-Place?

Yes

No

5. What are the age groups of homeowners for which you are doing Aging-in Place work?

(Check ALL that apply).

Less than 35 years 35 to 44 years 45 to 54 years 55 to 64 years 65 years or older

6. Do you find that most, some or none of the consumers seem to be familiar with Aging-in-Place concept?

Most

Some

None

7. Please check the type of Aging-in-Place remodeling projects your company has done in the past 12 months. **(Check ALL that Apply).**

Widen doorways

Lower countertops

Grab bars

Installing non-slip floors

Curb-less shower

Added bedroom on entry level

Ramps or lower thresholds

Installing easy to read thermostats

Installing higher toilets

Installing walk-in bathtub

Added lighting/task lighting

Add a new, full bath on the main level

Lower kitchen cabinets

Expand half bath into full bath on the main level

Other: (Specify) _____

8. What kind of increase in requests for Aging-in-Place features have you observed in the past 5 years?

Significant increase

Some increase

No increase

9. What are the reasons for your customers to undertake Aging-in-Place work? **(Check ALL that apply)**

Living with older parents

Acute age related disabilities

Planning ahead for future needs

Acute non-age related disabilities

Other: (Specify) _____

10. Is the majority of your Aging-in-Place work –

Determined by client

Suggested by contractor

11. How receptive are potential clients to incorporating your suggested Aging-in-Place modifications?

Very receptive

Somewhat receptive

Not at all receptive

12. Comments about Aging-in-Place work: