

Introduction

For years now there have been debates across the country on whether or not to adopt code requirements that mandate home fire sprinklers. While the fire protection industry argues home fire sprinklers are essential for improving the safety of the homes' occupants, many in the home building industry have argued against mandatory fire sprinklers because of the additional costs associated with them. As more and more states and jurisdictions consider adoption it seemed valuable to gauge stakeholder perceptions in states with widespread adoption.

While the fire protection and home building industry are at the forefront of the debate on home fire sprinklers, the reality is that implementing requirements for home fire sprinklers impact a variety of stakeholder groups. For that reason, the National Fire Protection Association (NFPA) has contracted with Newport Partners to conduct market research on stakeholder perceptions regarding home fire sprinklers, including their overall experience and perceived value of the systems.

To best understand the impact that home fire sprinkler requirements have on these stakeholder groups, this study focuses on the only two states in the country with mandatory requirements for home fire sprinklers, California and Maryland. The report includes an analysis of the overall experience and perceived value of the systems by homeowners, local government officials and water purveyors. These stakeholder groups were identified because they are all directly impacted by the requirements for home fire sprinklers.

This study does not include a cost analysis. In 2013, Newport Partners and NFPA completed an updated cost analysis titled, *Home Fire Sprinkler Cost Assessment- 2013*¹. Part of the analysis involved comparing the cost of home fire sprinklers in both California and Maryland to states without statewide requirements.

Key Findings

Homeowners- The majority of homeowners have a very positive view of sprinklers and would seek to have them included in their next home. Their positive view is most clearly associated with a sense of improved life safety (94%). Generally, they are less knowledgeable about specific details such as additional features, inspections, or sprinkler requirements. The majority of homeowners did not worry about water damage, however, 16 or 32% indicated concern for water damage either to furniture or the structure, or both.

Local Government Officials – When asked about the effects home fire sprinklers have on the homes in their jurisdiction it is clear that most local government officials view them in a positive light. The majority of participants believe that home fire sprinklers help reduce death and injury to both residents and firefighters, and help in reducing the costs due to fire damage. The conversation about home fire sprinklers seems to be more prevalent in Maryland than in California but in both states the majority felt the conversation was positive. While very few people indicated there was any negative tone to the conversation surrounding home fire sprinklers, when they did, cost was the identified as the biggest issue.

Water Purveyors – Most water purveyors in both California and Maryland required a larger service line (1 to 1-1/2 ") and a larger meter (¾" to 1-inch) in advance of the sprinkler requirement taking effect. Purveyors typically deal up to the meter, so once the service line and upgraded meter are in place, water utilities have very little concern for home fire sprinklers. In Maryland, they are aware of the

regulation but leave the application, implementation, maintenance and performance to the permit and fire engineering departments. Purveyors in California have similar responses, however, 4 of the 15 interviewed identified additional requirements beyond NFPA 13D or additional fees beyond usage.

Methodology

For homeowners and local government officials, Newport drafted survey instruments that were reviewed and approved by the Project Technical Panel. During testing, the wording of a few questions were modified for clarity and to reduce confusion. For example, the term home fire sprinkler system seemed to confuse people leading to a perception that the "system" was something bigger than the fire sprinklers they acknowledged having.

Several approaches were used to gather responses from homeowners:

- ☒ Intercept surveys at a California Home Show
- ☒ Facebook survey postings
- ☒ In-person visits to recently constructed neighborhoods
- ☒ Purchased email lists
- ☒ Each completed survey participant received a \$5 Starbucks gift card.

For local government officials, Newport purchased a list of local California officials from the California Municipal League, developed a postcard mailing, and requested they do one of the following:

1. Log on to Survey Monkey,
2. Email us for a paper copy; or,
3. Call us and take the survey by phone.

Most respondents opted for the Survey Monkey option. There was no incentive offered.

In Maryland, the timing was such that we were able to gather survey responses by attending the Maryland Municipal League annual convention in Ocean City, Maryland. Respondents received a small gift bag for stopping and taking the survey.

To gather the perceptions of water purveyors, Newport developed an interview guide that was reviewed and approved by the Project Technical Panel. We developed lists of water purveyors and conducted telephone interviews.