



# Home Trends Buyer Preferences and Must Have Features For 2021

Donald Ruthroff and Rose Quint



Bay Front  
Newport Beach, California



**Rose Quint is an Economist and NAHB Assistant Vice President for Survey Research.** Quint holds a B.S. in Economics/International Business from Old Dominion University and a Master's degree in Economics from Virginia Polytechnic Institute and State University. Her responsibilities include planning and conducting industry surveys, specifically in the areas of builder sentiment, remodeling, housing affordability, and AD&C financing issues. Quint is also responsible for special research projects, such as studies on builders' profitability, consumer preferences, construction costs and membership census.



**Don Ruthroff is an Architect, Principal and leader of DAHLIN neighborhood residential sector.** Don works with a mix of public and private homebuilder clients, as well as landowners and developers. His wide range of experience extends from production residential communities in the United States and Mainland China to neighborhood convenience centers in California. In his over 20 years at DAHLIN, he has worked in densities ranging up to 40 du/ac with his primary area of focus in the western United States. With over 30 years of experience and training in both architecture and structural engineering, Don's work benefits from his well-rounded breadth of expertise. Both Don's experience and excellent eye for design have made him a distinguished and sought-after industry leader. He is frequently invited to speak at industry conferences and to judge in industry award programs.



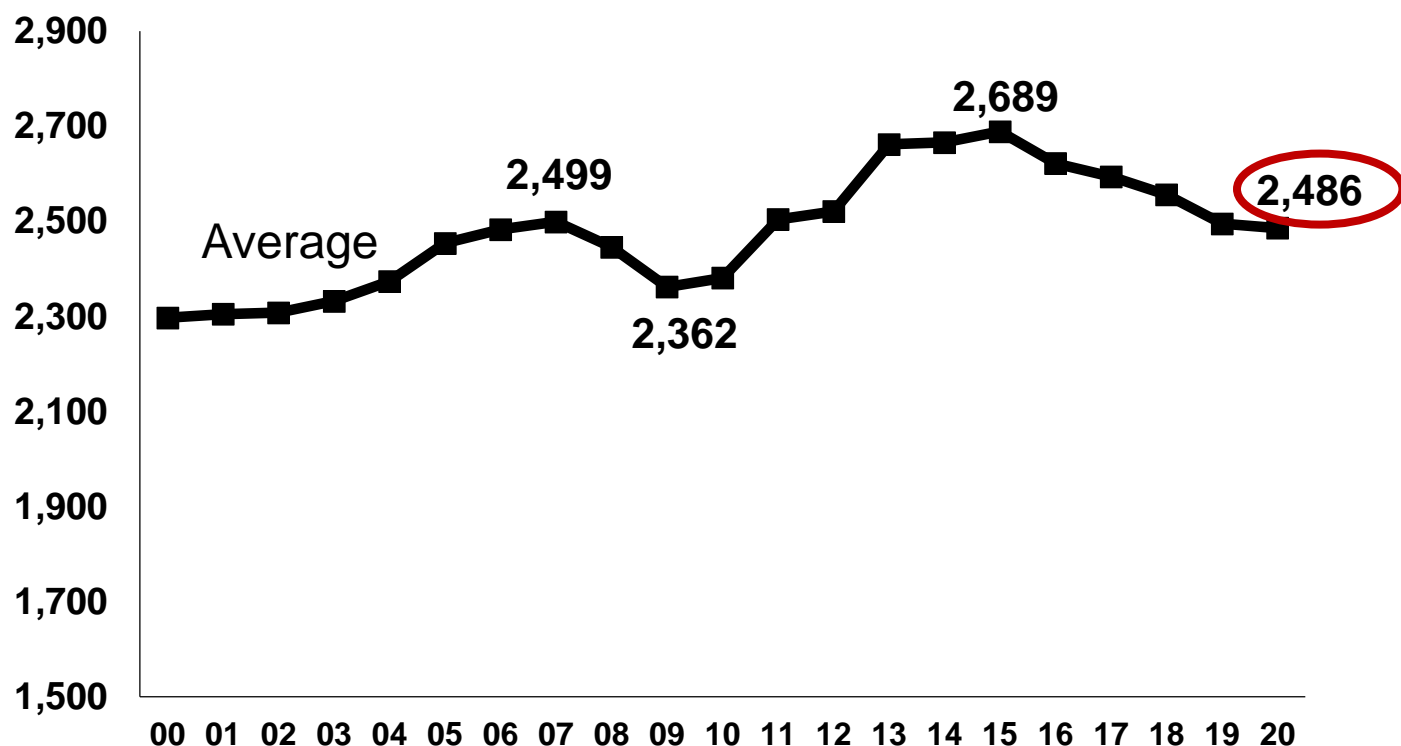
# Characteristics of Homes Built in 2020



**Caruthers  
Houston, Texas**

# Size of New Single-Family Homes Started

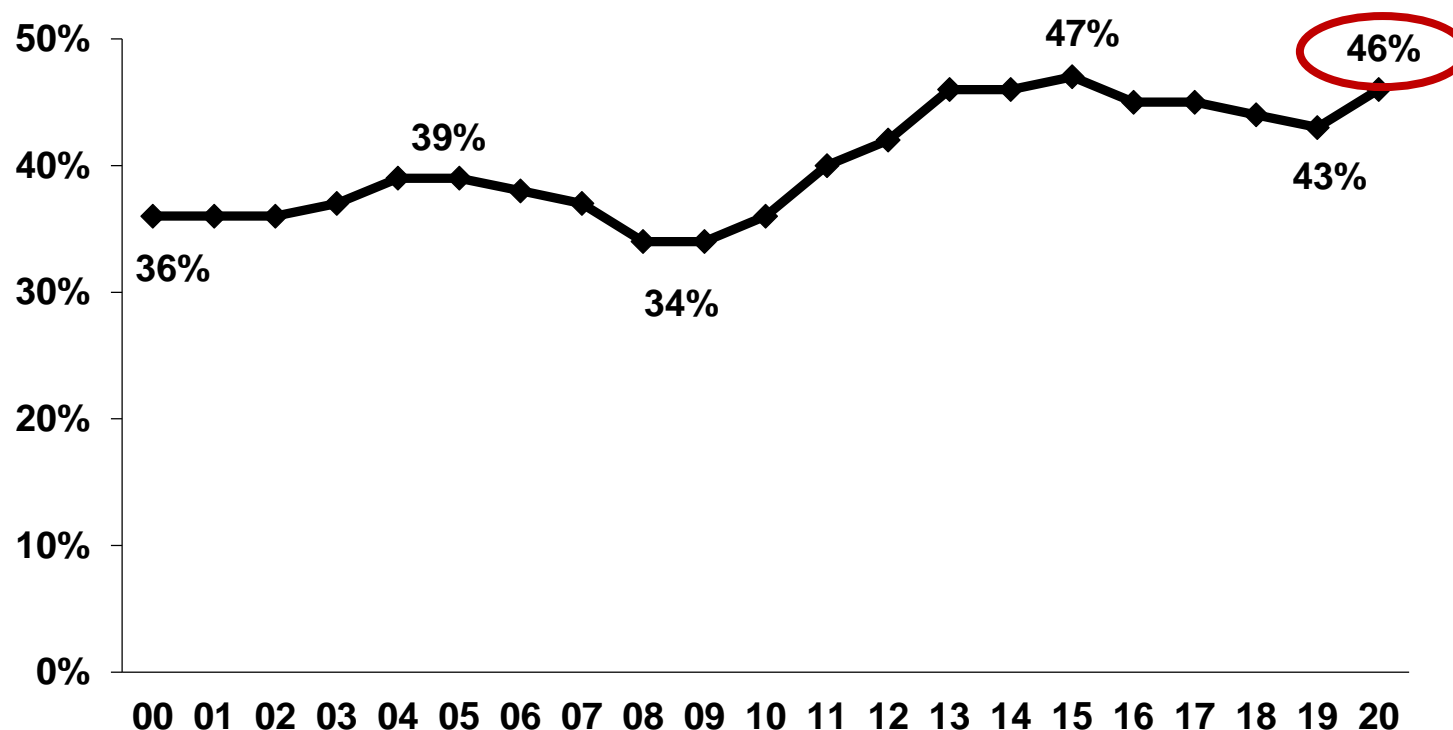
(sq. ft.)



- After peaking at 2,689 sq. ft. in 2015...
- Average size of new homes fell in 2016, 2017, 2018, and 2019, but then...
- Was flat in 2020, at 2,486 sq. ft. (vs. 2,495 in 2019).

# New Homes with 4+ Bedrooms

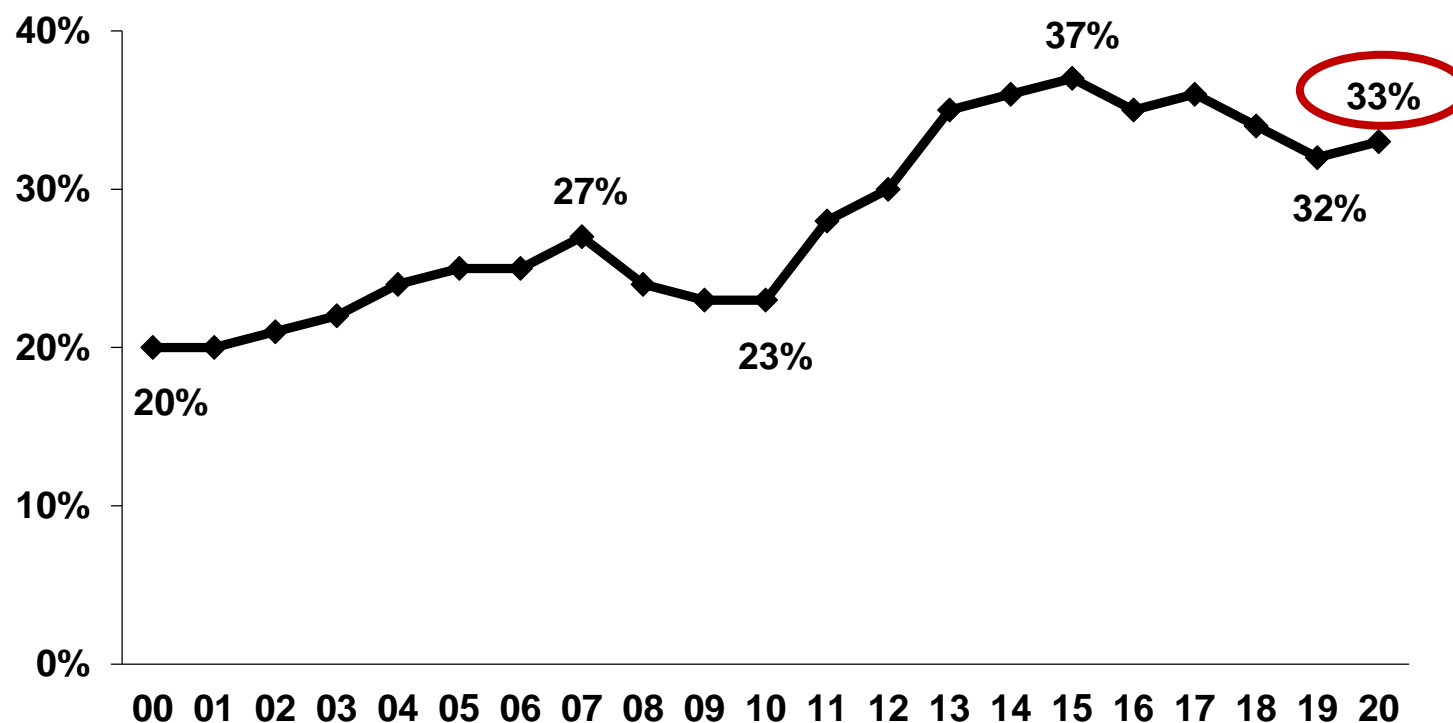
(% of single-family homes started)



- After peaking at 47% in 2015...
- The share of new homes with 4+ bedrooms declined to 43% by 2019, but then...
- Jumped back up in 2020 to 46%.

# New Homes with 3+ Full Bathrooms

(% of single-family homes started)



- After peaking at 37% in 2015...
- The share of new homes with 3+ full bathrooms declined to 32% by 2019, but then...
- Rose back up in 2020 to 33%.

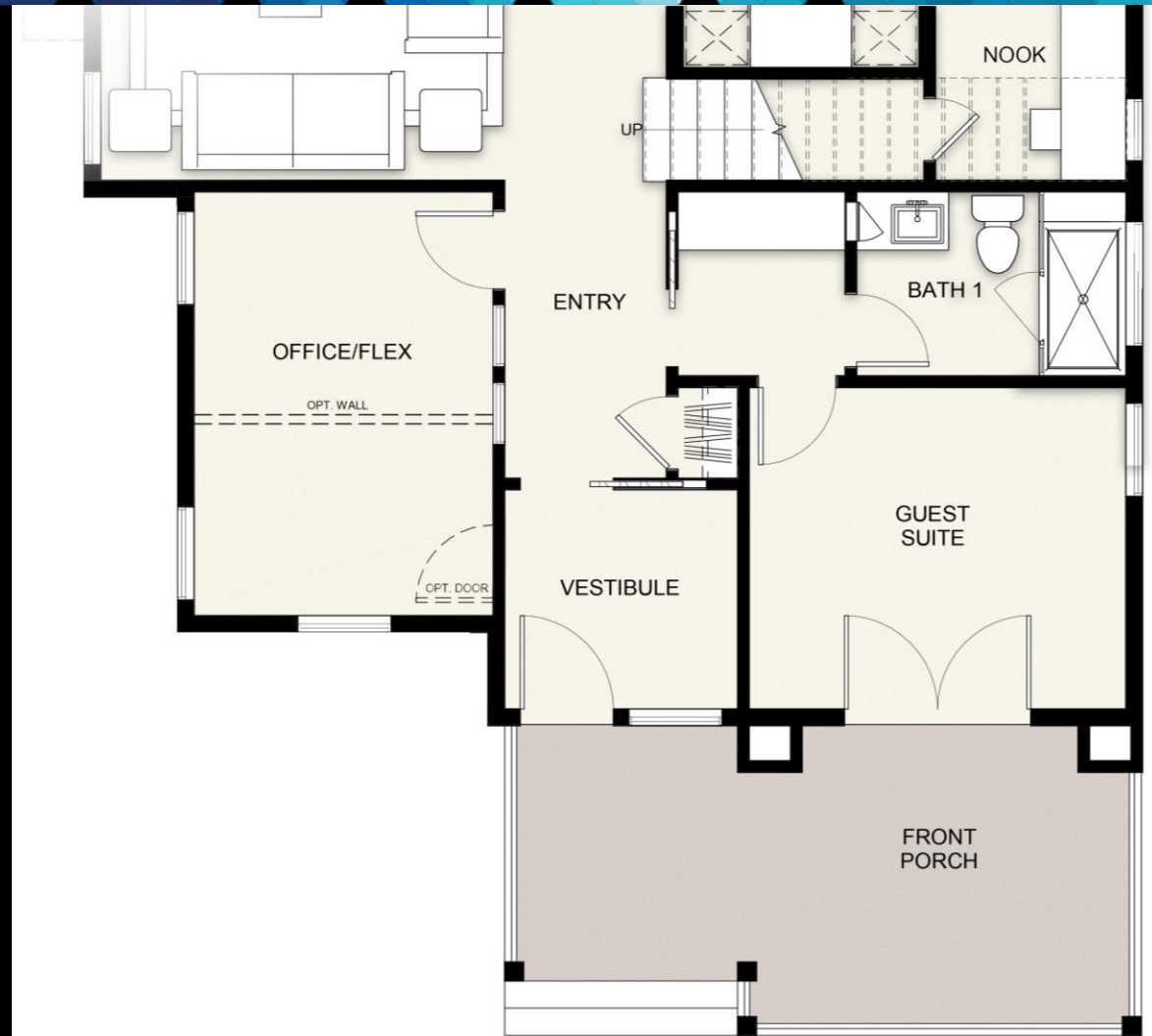
## Takeaways

- Downsizing trend lasted four years: 2016 through 2019.
- Average home size was flat in 2020, but it will increase in 2021 (for the first time since 2015).
- COVID-19 pandemic has increased desire for larger homes in outlying suburbs.



# America At Home Concept Home North Carolina

**Floor Plan  
Changes...**

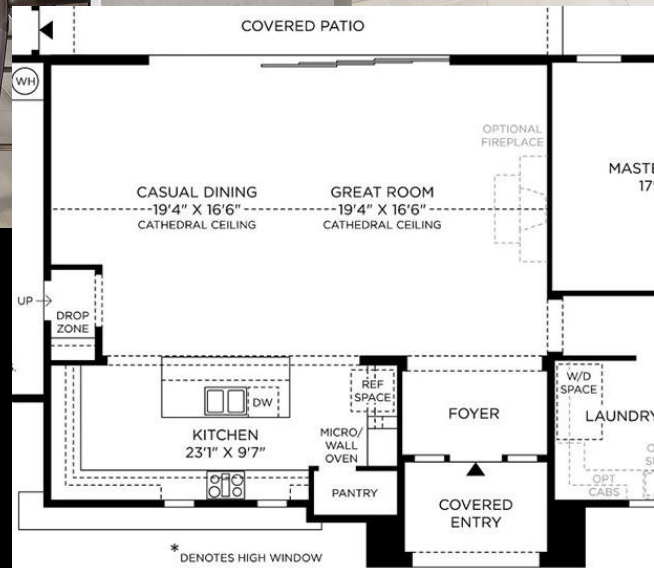
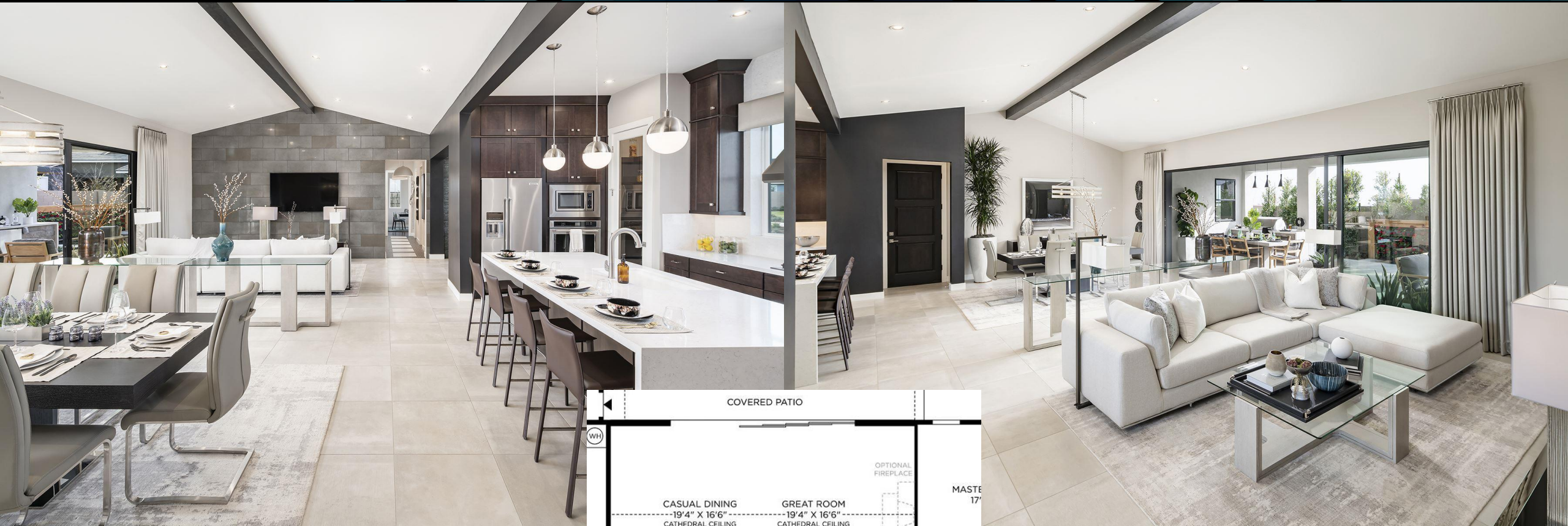


**FIRST FLOOR**





# Sterling Grove – The Midwood Surprise, Arizona





# Sterling Grove – The Smithfield Surprise, Arizona





# Homestead at Irby Ranch Pleasanton, California





# Pilsen Modern Chicago, Illinois





Founders Pointe at Midtown  
Mount Pleasant, N Carolina

The Charleston Coastal  
Eagle, Idaho





The Charlston Coastal  
Eagle, Idaho

Sterling Grove – The Calistoga  
Surprise, Arizona



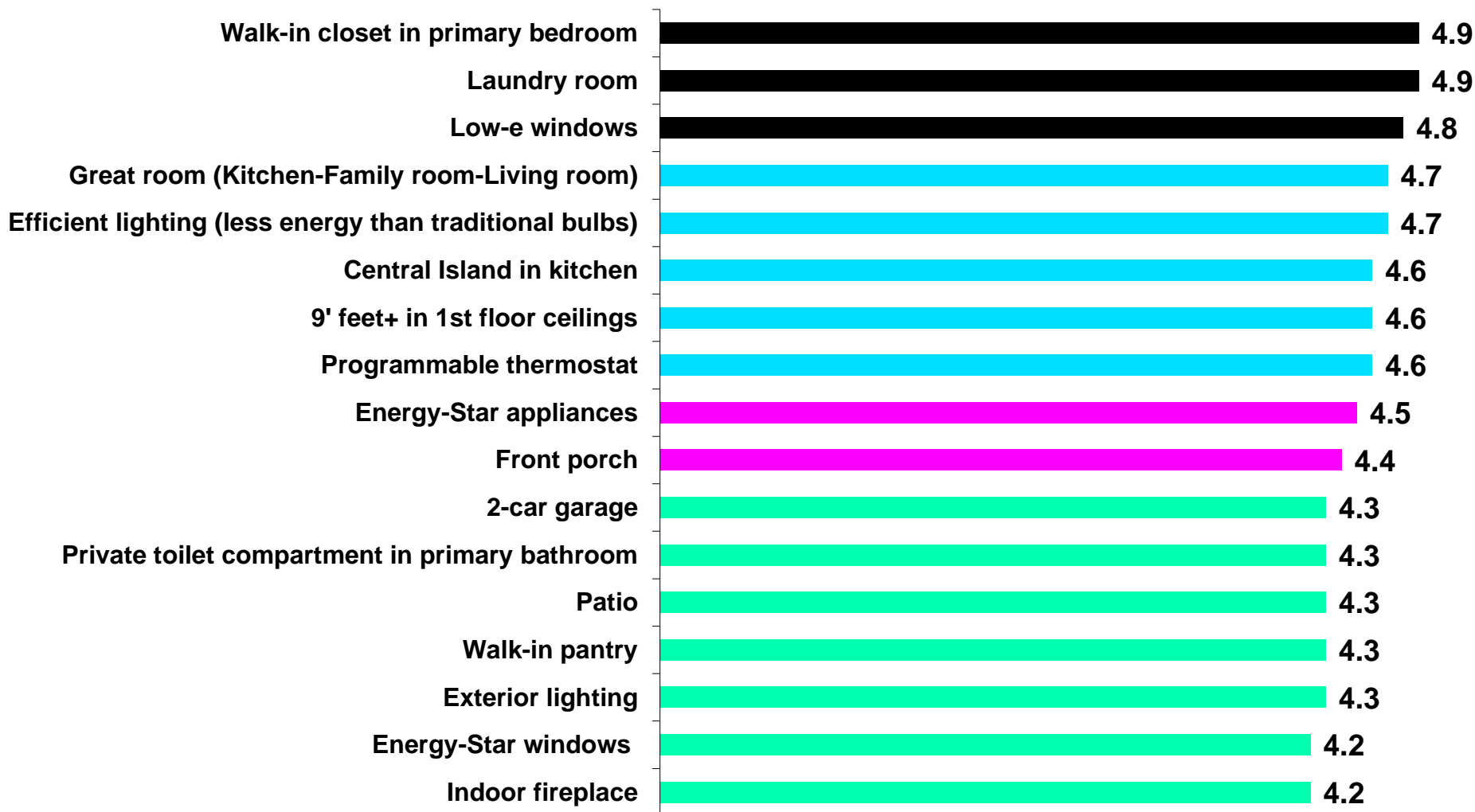


## **Builders' Survey:**

**Most Likely Features in Typical New Home in 2021**

# Most Likely Features in Typical 2021 New Home

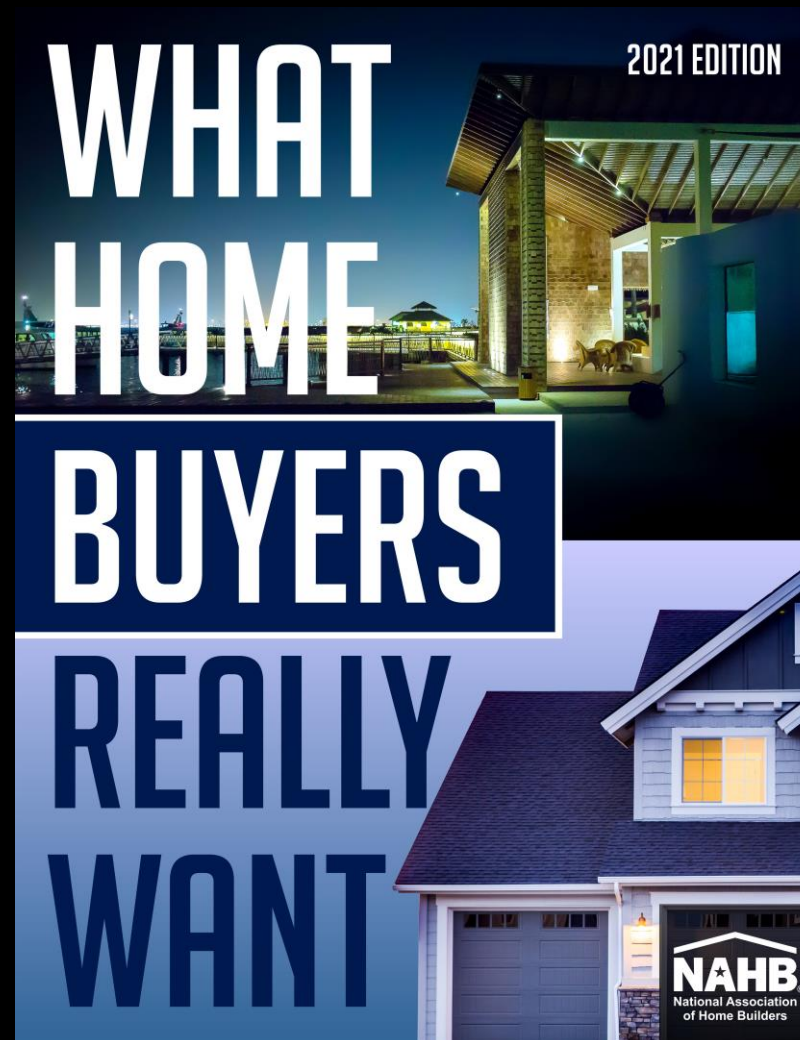
(Avg. Rating, 1=Not at all likely, 5=Very Likely Builder will include)



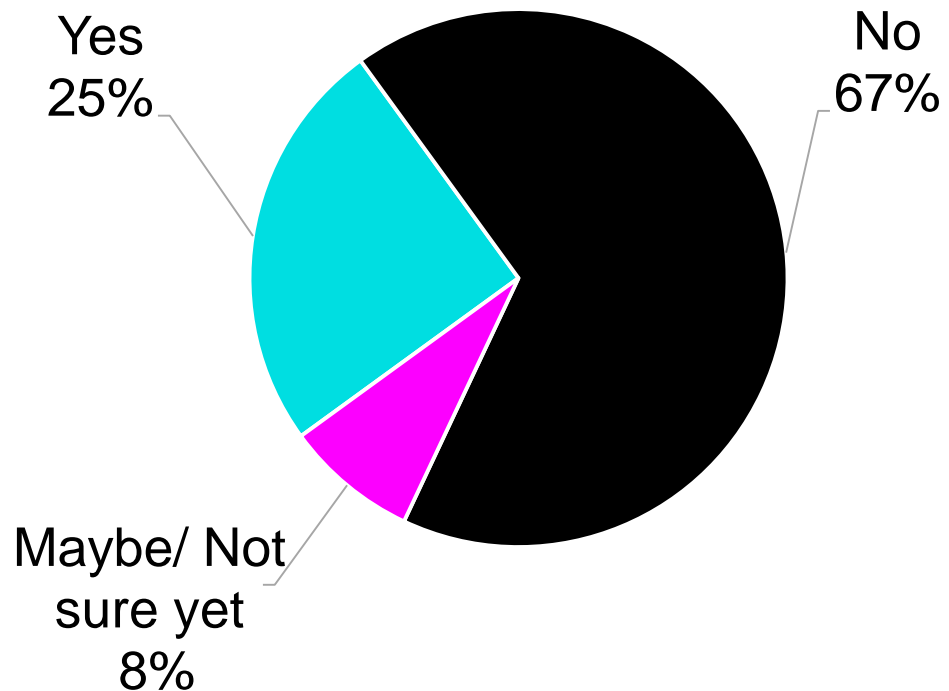




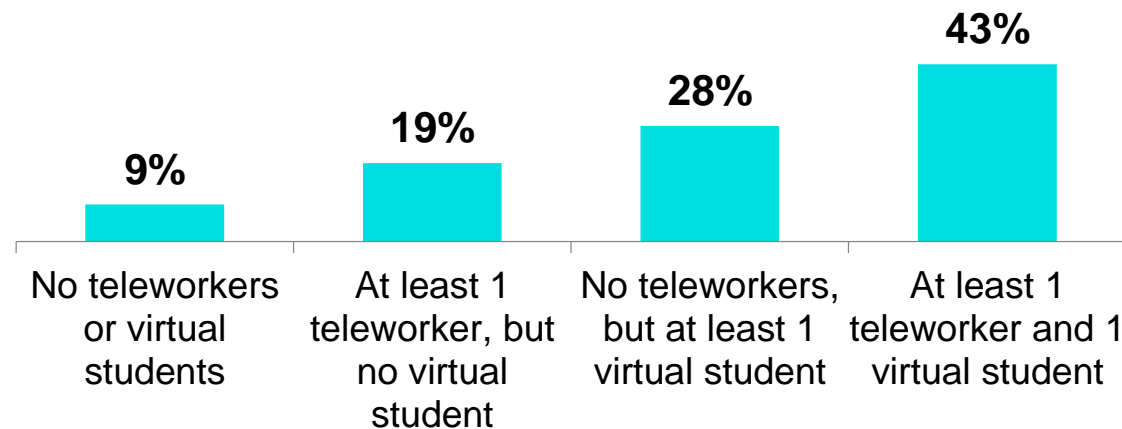
# What Home Buyers Really Want 2021 Edition



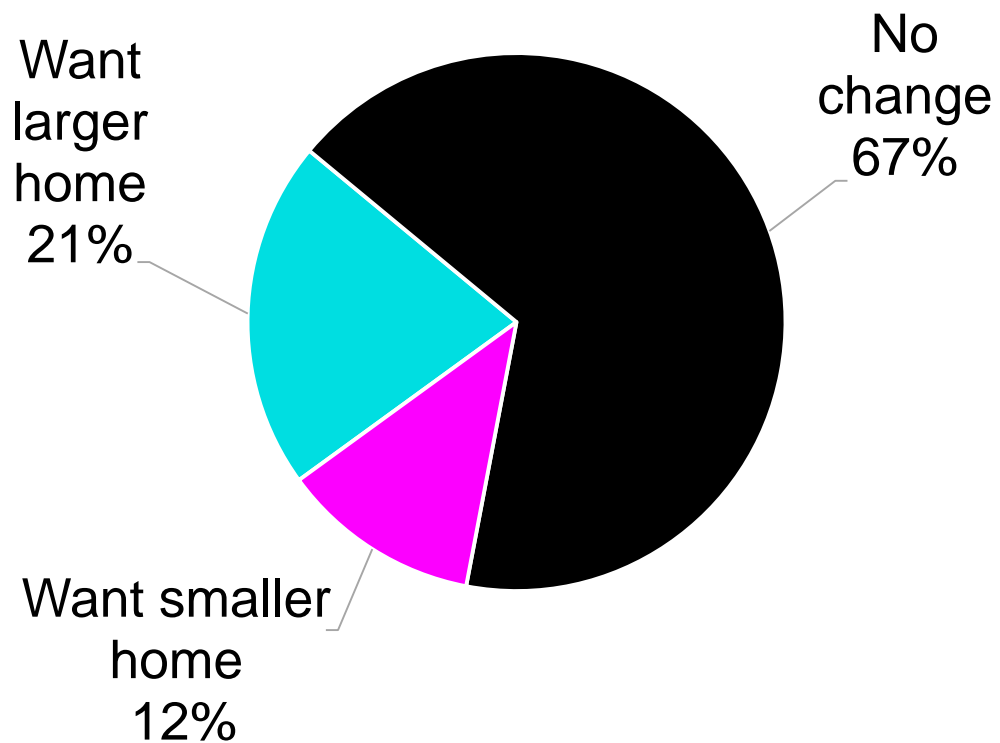
## Has the Pandemic Impacted Your Housing Preferences?



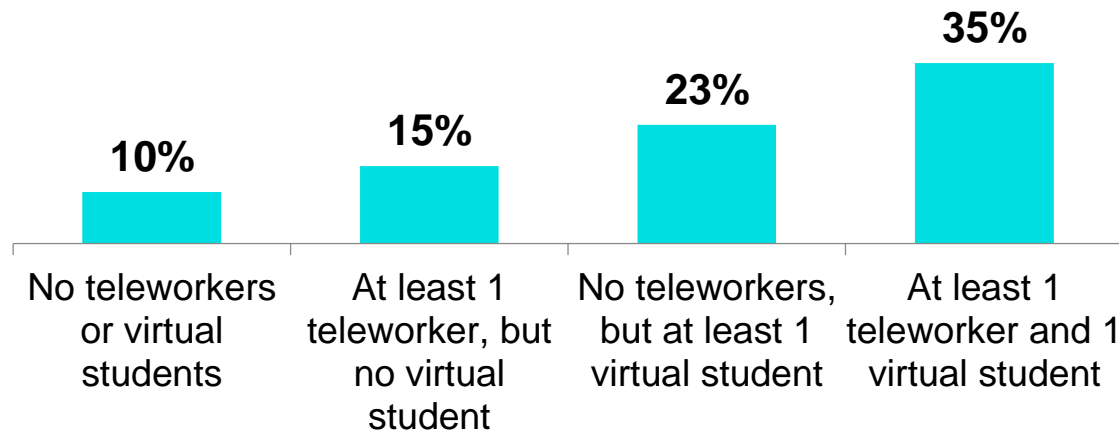
## Households with Teleworkers/Virtual Students Are Most Likely to Feel Impact



## How Has Preference for Home Size Changed Because of Pandemic?

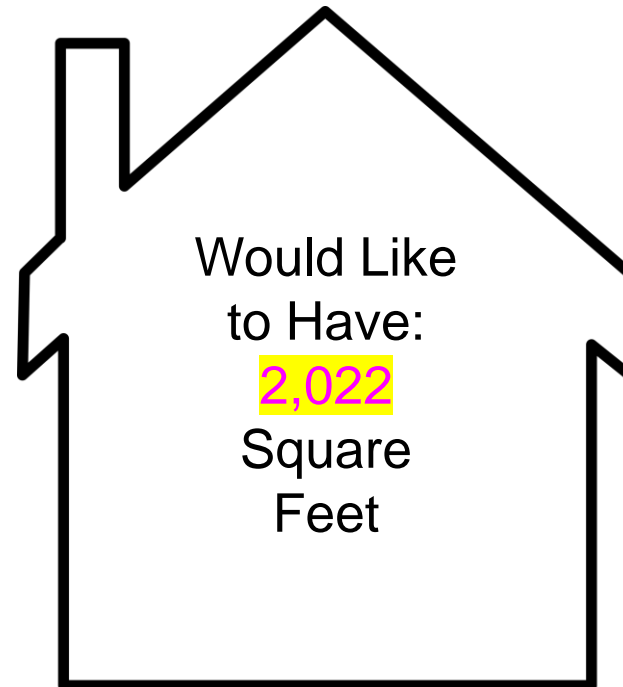
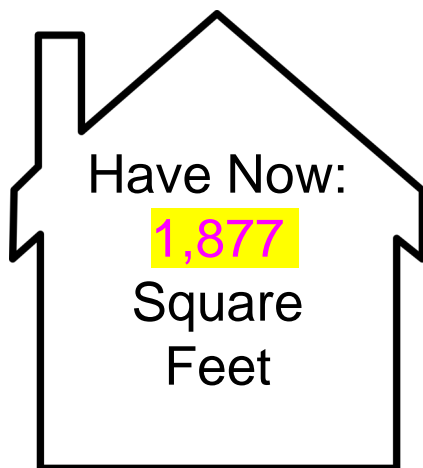


## Households with Teleworkers/Virtual Students Are Most Likely to Want Larger Homes



# Buyers Want 8% More Space than They Currently Have

(Median Square Feet)





# One Cardinal Way St. Louis, Missouri

**Color and  
Materiality...**





# Painted Prairie Aurora, Colorado





# Sterling Grove – The Calistoga Surprise, Arizona





# Farm to Table Wilsonville, Oregon







Painted Prairie  
Aurora, Colorado

Shea Solstice  
Littleton, Colorado





Town Walk  
Weaverville, North Carolina

Lavish Lake Living  
Austin, Texas

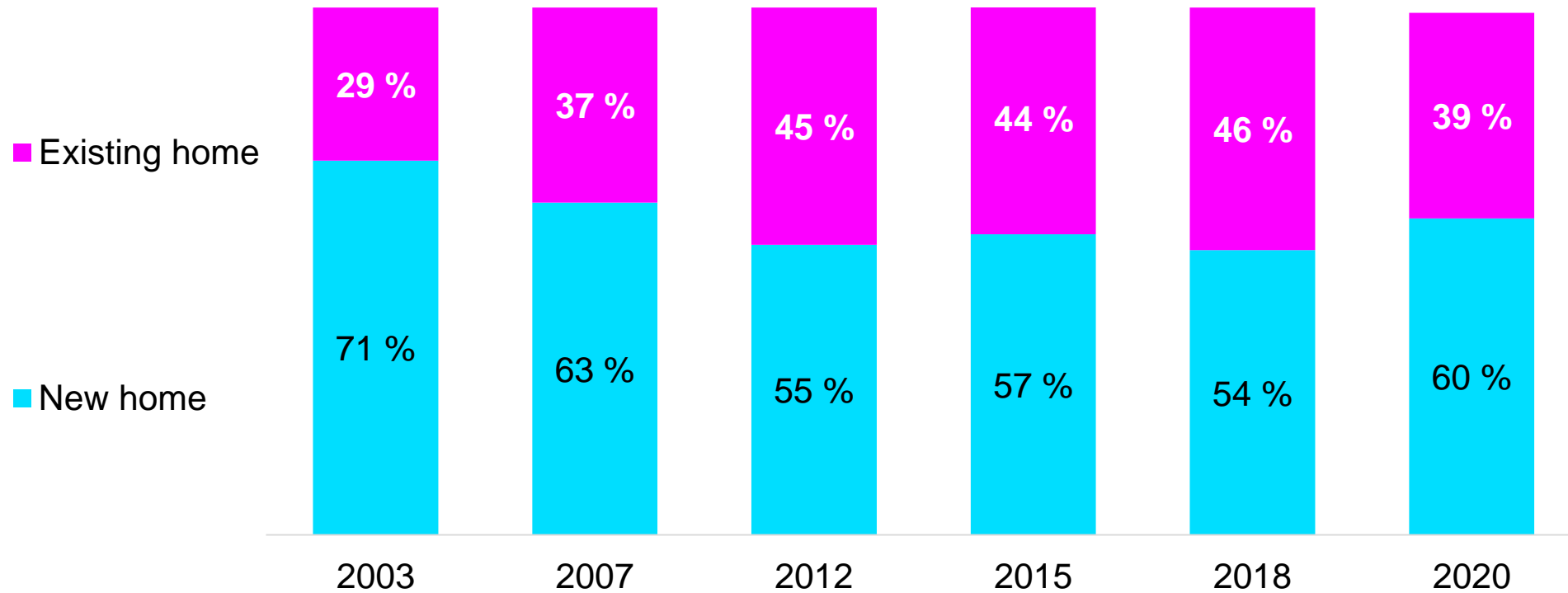




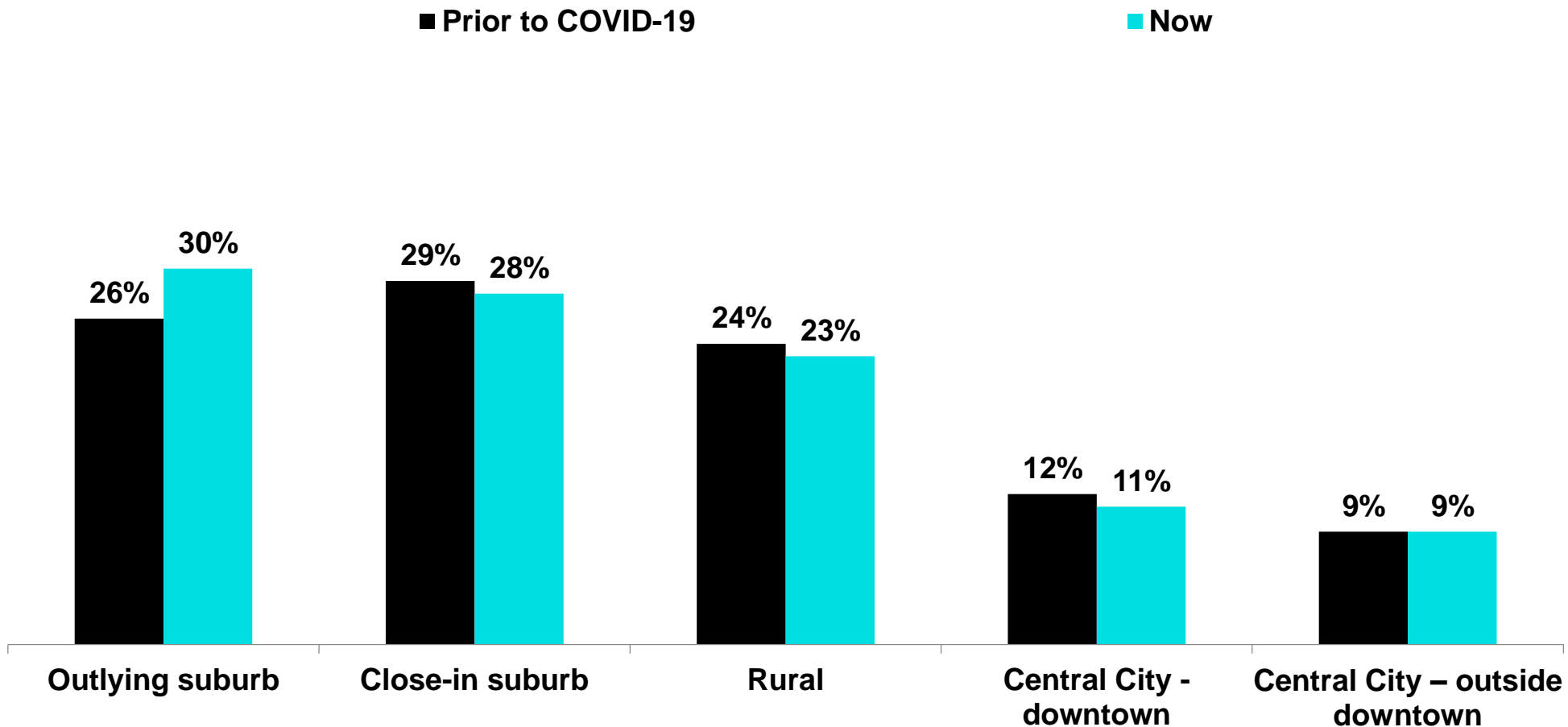
# Vici San Diego, California



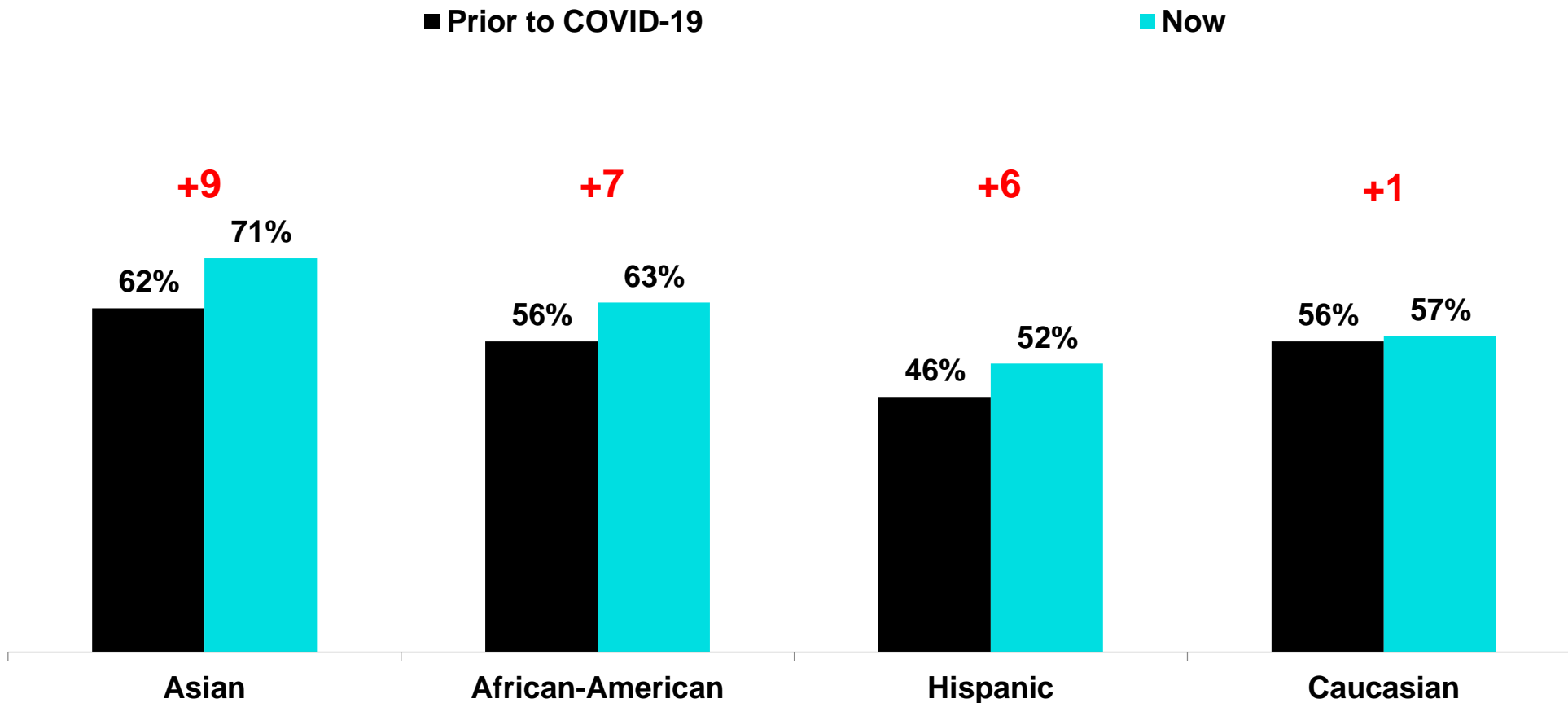
# Preference for New vs. Existing



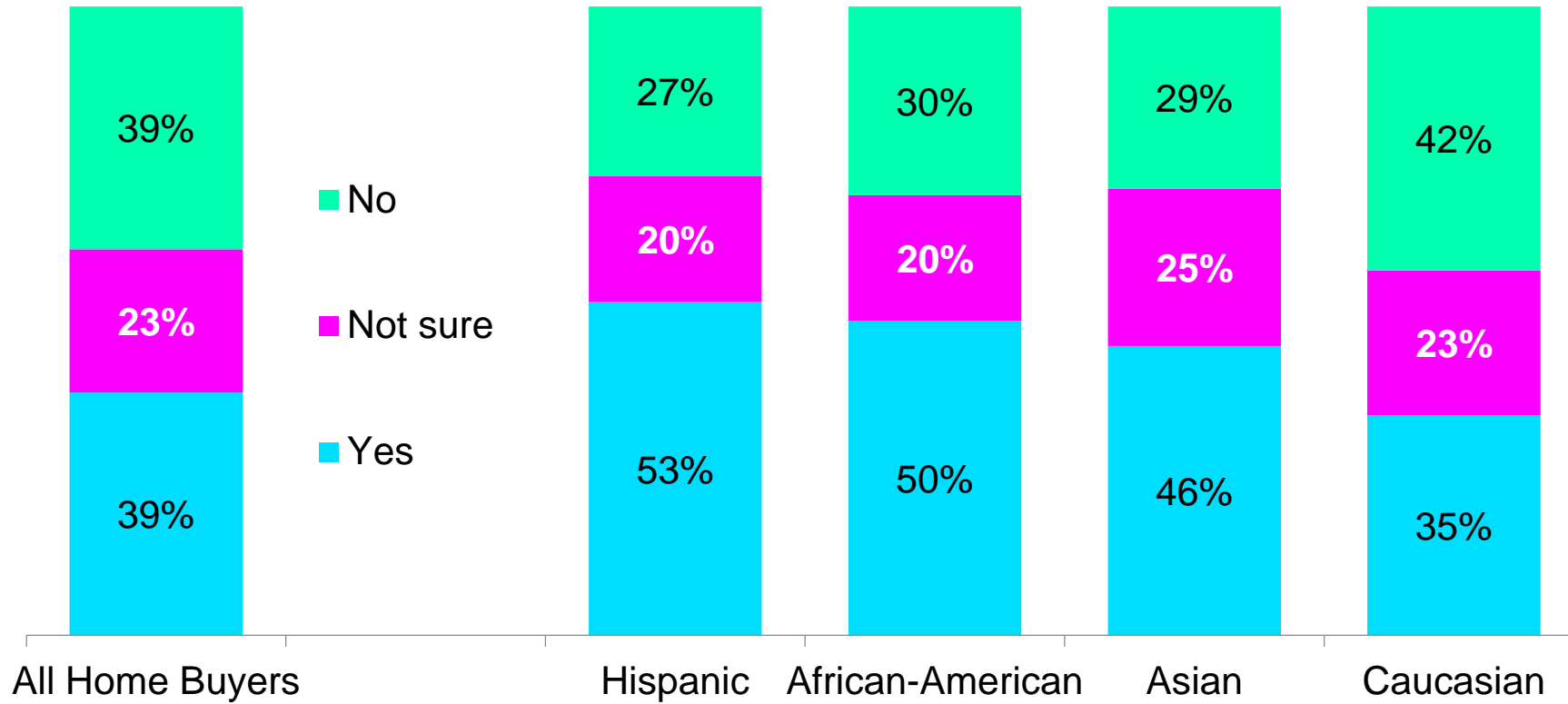
# Location Preferences Shift Toward Outlying Suburbs



# Minorities Drive Increased Interest for Suburbs



# Would You Prefer a Home Designed for Multiple Generations?



# Buyers Have Diverse Preferences for Exterior Design

32%



**Traditional**  
(Rooted in historic styles)

24%



**Contemporary**  
(Clean lines, sloped roofs, expansive windows)

16%



**Transitional**  
(Contemporary design with traditional cues)

14%



**Modern**  
(Bold, boxy, flat roofs)



- A 'traditional' home is the 1<sup>st</sup> choice of plurality of buyers (30%-45%) in 8 of 9 divisions.
- Exception – the Pacific, where 29% prefer a 'contemporary' home.





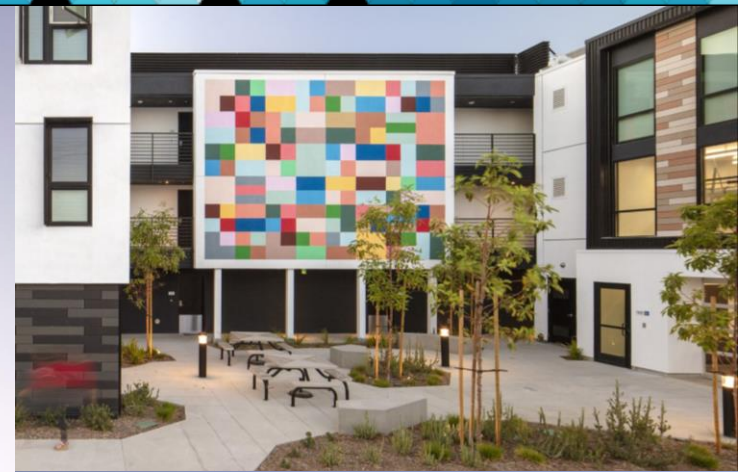
# Painted Prairie Aurora, Colorado

**Thoughts  
on  
Style...**





# Carson Arts Colony Carson, California





# Shea Solstice Littleton, Colorado





# Lavish Lake Living Austin, Texas





# Avanti Oakland Township, Michigan





# Abbot Oaks Campbell, California

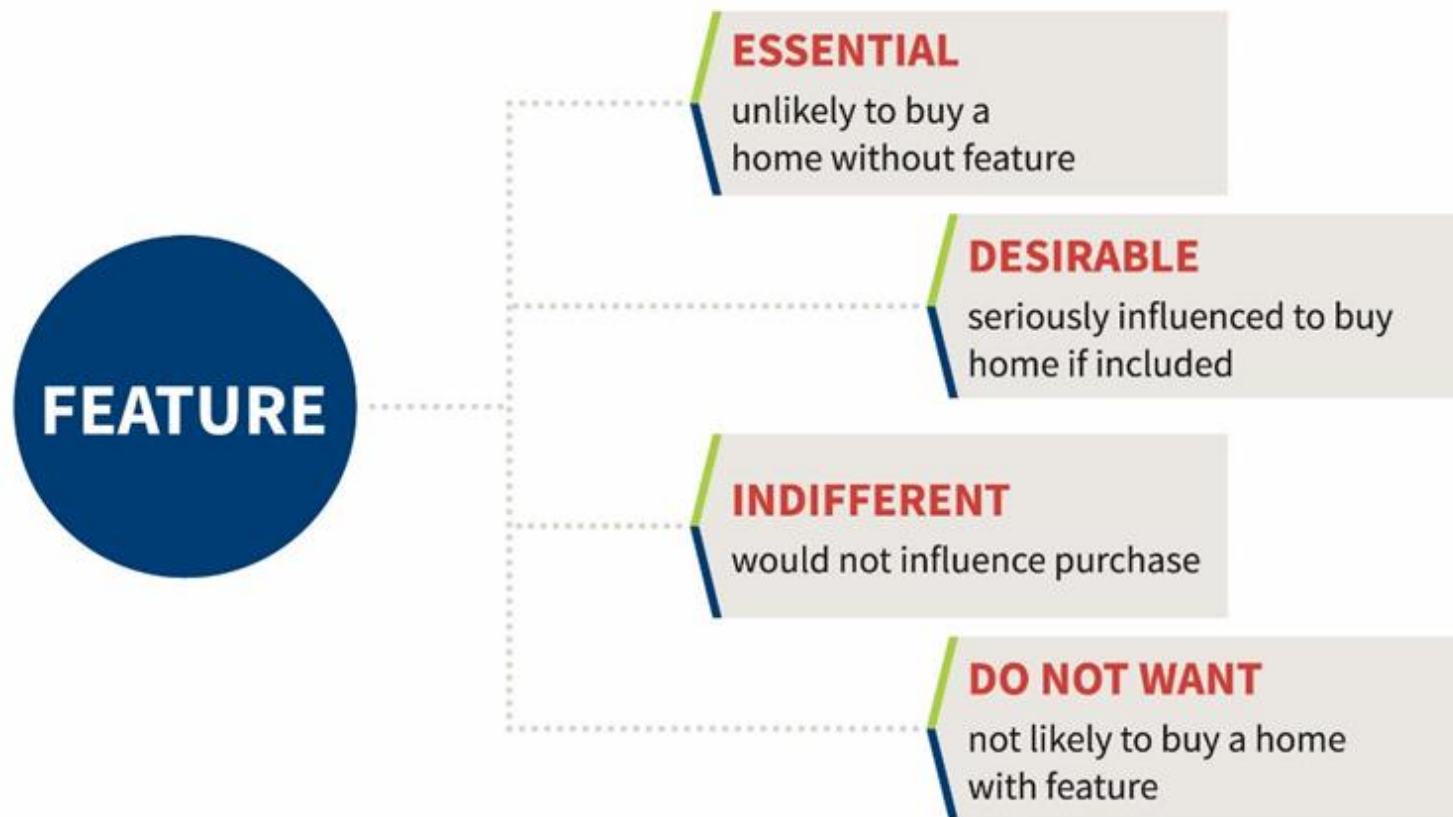




# Urban Modern Paradise Valley, Arizona



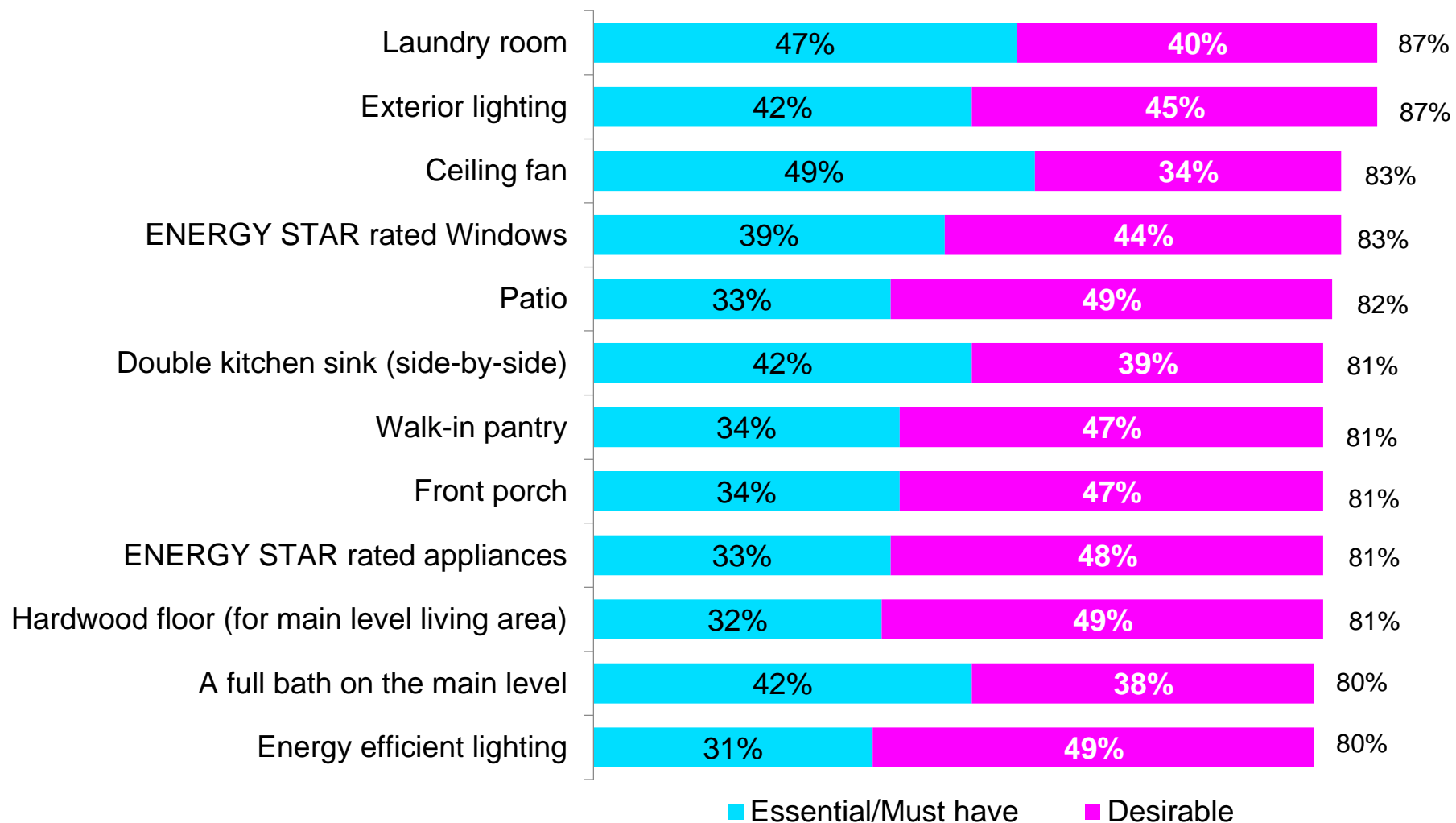
# Homebuyers Rated 200+ Features as...





# The Most **Wanted** List

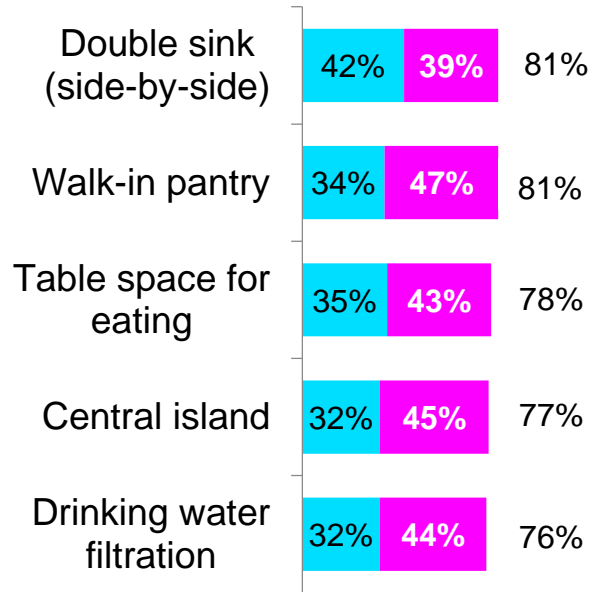
(% of Home Buyers Rating Essential/Desirable)



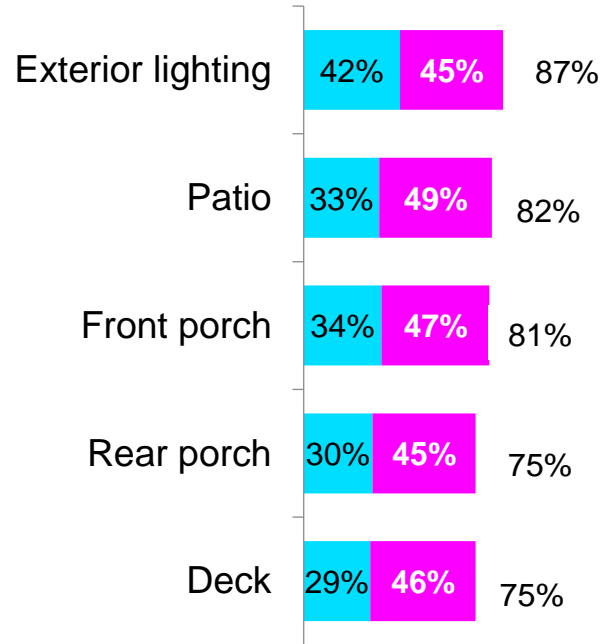
# Top 5 Kitchen, Outdoor, & Accessibility Features

(% of Home Buyers Rating Essential/Desirable)

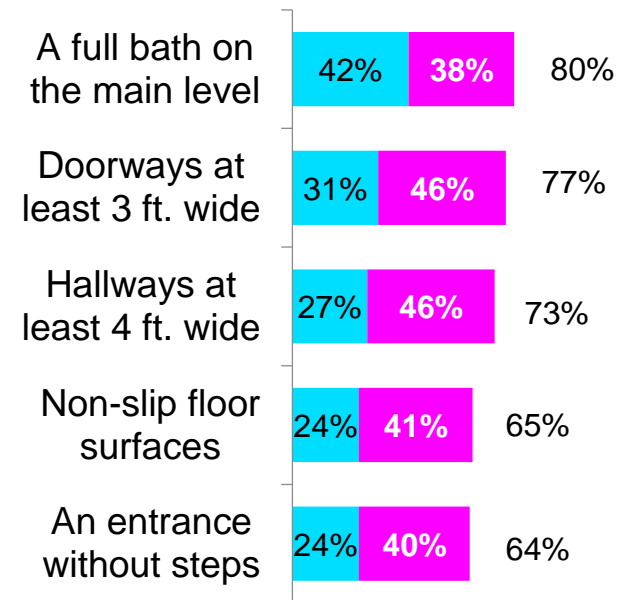
## Kitchen Features



## Outdoor Features



## Accessibility Features

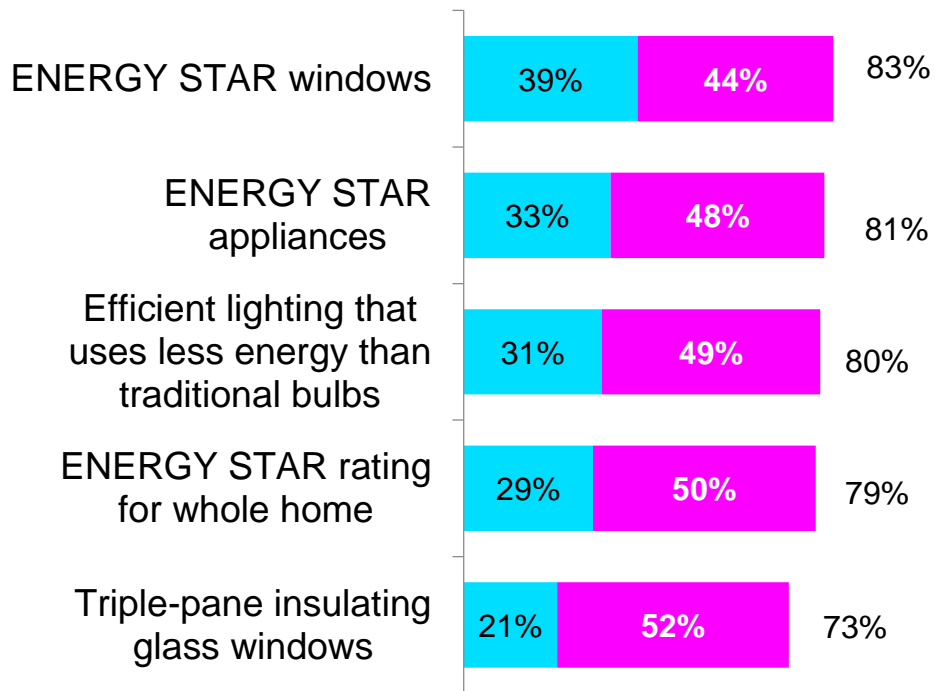


■ Essential/Must have ■ Desirable

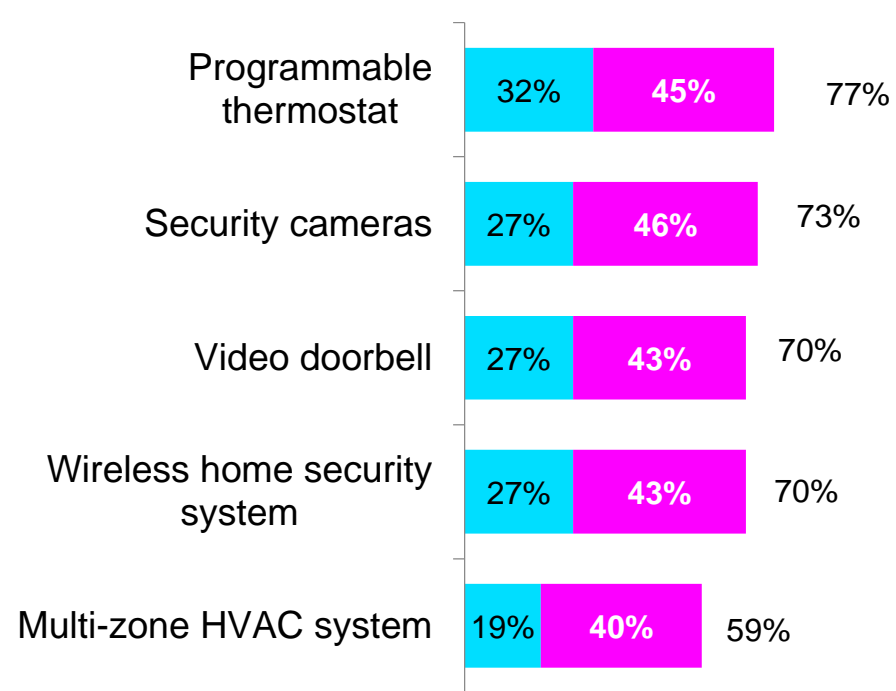
# Top 5 Green & Technology Features

(% of Home Buyers Rating Essential/Desirable)

## Green Features



## Technology Features



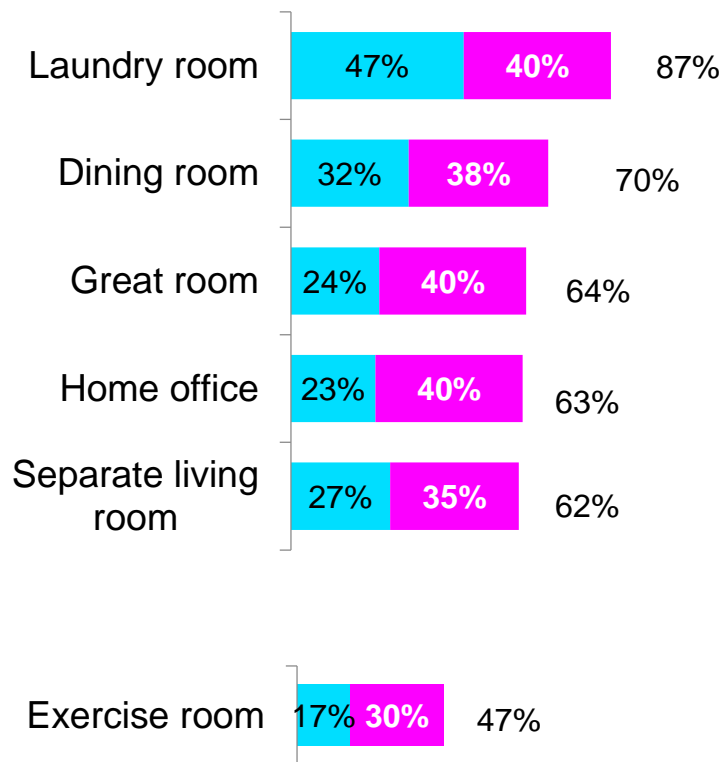
■ Essential/Must have

■ Desirable

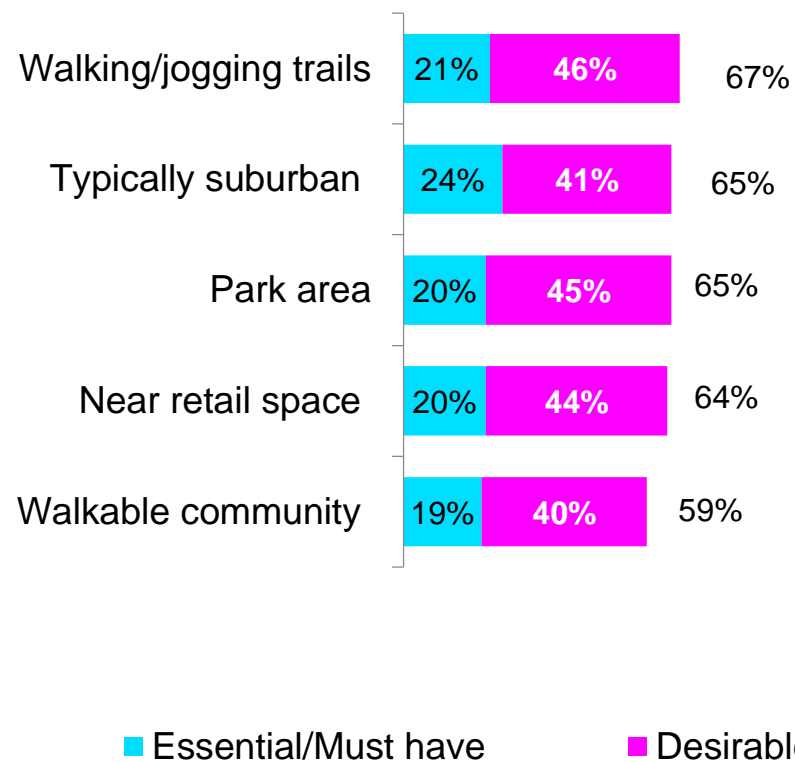
# Top 5 Specialty Rooms & Community Features

(% of Home Buyers Rating Essential/Desirable)

## Specialty Rooms



## Community Features

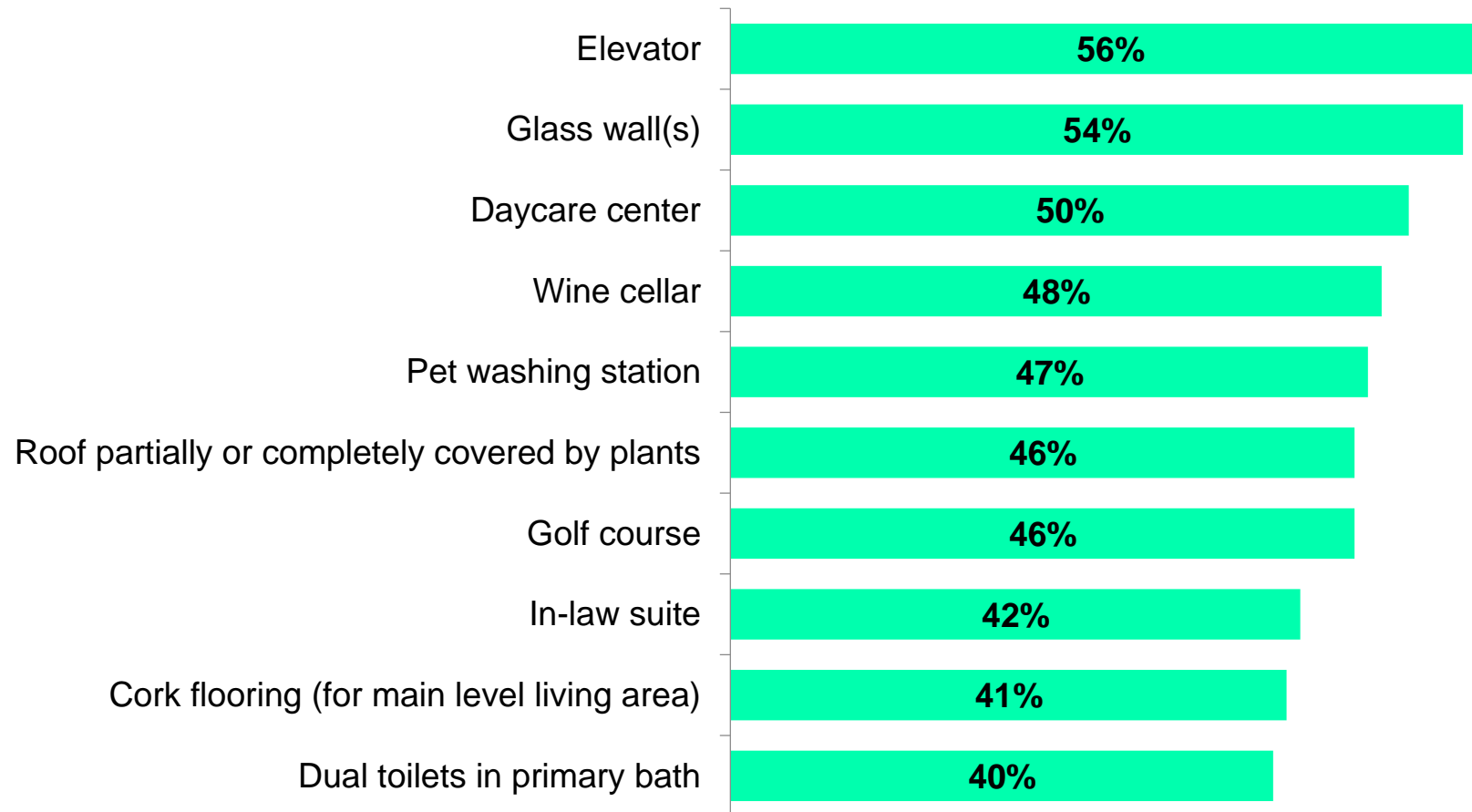


■ Essential/Must have

■ Desirable

# The Most UNWANTED List

(% of Home Buyers Rating 'Do not Want')





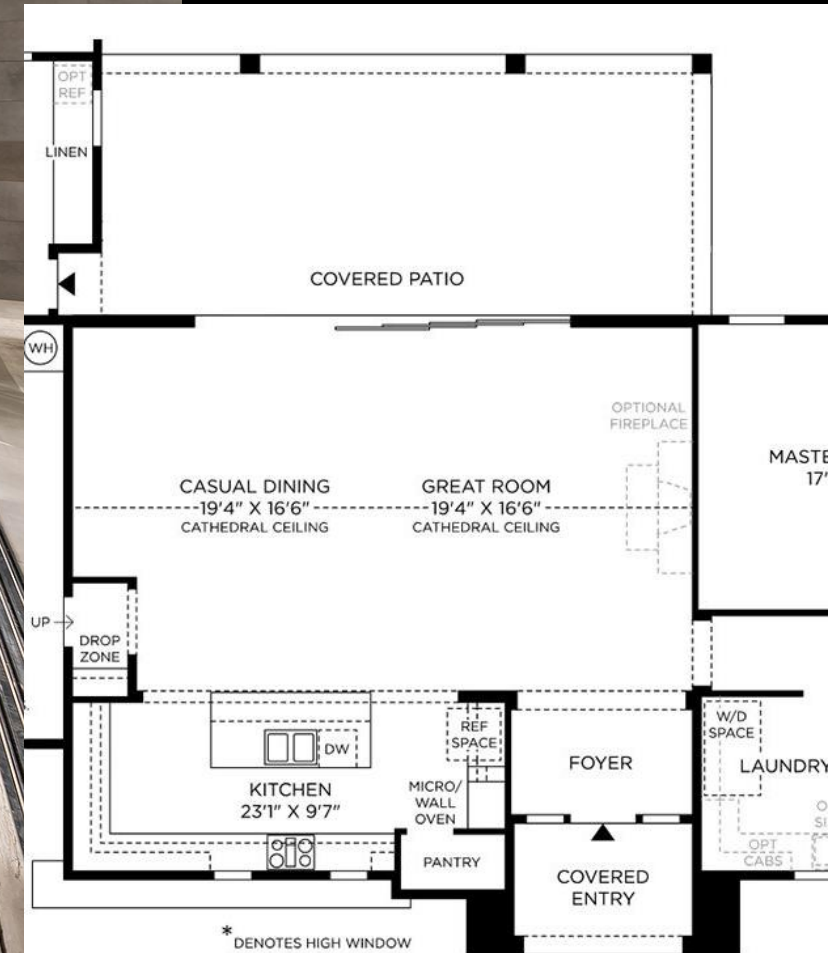
# Tonal Harmony Paradise Valley, Arizona

**The Great  
Outdoors...**





# Sterling Grove – The Midwood Surprise, Arizona





# Rosemary House Northbrook, Illinois







# Sterling Grove – The Calistoga Surprise, Arizona





# Sterling Grove – The Smithfield Surprise, Arizona





# Farm to Table Wilsonville, Oregon





# Waterline Point Richmond, California



# Thank you!



**Ridge House  
Los Angeles, California**



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**Ridge House**  
**Los Angeles, California**