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**SECOND WAVE OF NATIONAL CONSUMER SURVEY UNDERSCORES RADICAL SHIFT IN HOW AMERICANS PERCEIVE AND WANT TO LIVE IN THEIR HOMES**

*Survey data shows the COVID-19 pandemic has directly generated a demand potential of 11 million housing units for buyers, with imminent and permanent changes in housing products, materials and amenities*

**SAN DIEGO, CALIF. (December 4, 2020)** – America is in the midst of a historic paradigm shift, with thoughts, behaviors and material needs related to “home” undergoing a complete reconstruction. There’s been a whirlwind of speculation about what homes will look like and how people will live in a post-pandemic society, but hard data showing how Americans feel about and live in their homes during COVID-19 didn’t exist until the [America at Home Study](#) launched earlier this year<sup>1</sup>. Now, the America at Home Study team has completed its second wave survey, turning all speculation about American home life into factual, actionable findings that will forever change the way we build and live.

The findings show more than future trends of what Americans are willing to spend; it lifts the veil on what people are doing right now. The data suggests the U.S. currently faces a sizable, untapped demand for 11 million<sup>2</sup> new homes as a direct result of COVID-19.

**A Growing Study for a Society Transforming**

The America at Home Study was launched in collaboration between three women leaders in the homebuilding industry, each with decades of experience in better understanding customers: marketing expert Teri Slavik-Tsuyuki, market and consumer strategist Belinda Sward, and architect Nancy Keenan.

After the first study was released in May, Kantar, the world’s leading data insights and consulting company, approached the team to collaborate and integrate its [MindBase](#)<sup>®</sup> consumer attitudinal segmentation into the second wave. Kantar explored specific MindBase segment sentiments about home and lifestyle post-pandemic.

“This second study was issued to see if peoples’ impressions and feelings of home have changed over the past six months as we continue adjusting to life in a pandemic,” said Slavik-Tsuyuki, principal at tst ink LLC. “We expanded the choices in some of the questions based on learnings and insights gathered since the first study, specifically in the areas of health, wellness and new home shopping behaviors, and how they may have changed. We can confidently report that most of the changes we saw are indeed sticking, and responses from the new questions we asked are strong, insightful and reliable.”

Similar to the first wave, the second wave of the America at Home Study was a nationally representative survey of 3,935 US adults between the ages of 25-74, with household income of \$50,000 per year or more. The second wave was conducted online in three phases in October (to ensure full national representation by MindBase segment) with results analyzed and made publicly available in November. The study was hosted by Gazelle Global Research, then appended with Kantar’s MindBase<sup>®</sup> consumer attitudinal segmentation to explore specific sentiments about home and community across different generational and attitudinal consumer segments. Respondents were asked about changes

they've made in their homes and garages in light of the pandemic, what changes and behaviors they expect to last, and disclosed what they want and are willing to pay for next.

"The integration of MindBase into this consumer study on changing attitudes towards home and lifestyle in the age of COVID will create a powerful segmentation tool for local and national builders, as well as Master-Planned Community developers," said Colleen Sharp, vice president of MONITOR Analytics at Kantar. "This will help builders and developers respond to consumers' changing needs by pinpointing the right targets, honing messaging, sizing potential markets and designing the right communities based on attitudes and values of their core segments."

### **The New PPE: Plans, Preferences and Expectations Show Divergence from Pre-Pandemic Lifestyle**

Americans' thoughts about home itself are taking new form. Across both studies, the idea of "home" resulted in the same top three responses: "a safe place," "family," and "comfort," respectively.

More homeowners are planning to move sooner than originally expected, with wave two of the survey showing a 50% increase in homeowners who noted COVID-19 sped up their pre-pandemic moving plans. This equates to a new home demand of 3.5 million. Those planning to move sooner overwhelmingly prefer single-family detached homes for their next home purchase (84% in wave one and 87% in wave two). The number of homeowners who were planning to stay in their current home increased between wave one (42%) and wave two (45%).

Current living arrangements and behaviors are changing as well. Homeowners who made changes to their garages and carports reported a noticeable increase in additional storage space from wave one (17%) to wave two (26%). There's also been an increase in home technology upgrades (18% in wave one and 29% in wave two). Respondents also reported they are disinfecting things more, a behavior 80% of Americans plan to continue.

As for what homeowners are willing to pay for in their current or new home, both studies showed demand for technology, better equipped kitchens, germ-resistant surfaces, a desire for more storage, and a need for more adaptable spaces and flexible walls for multipurpose uses.

Renters are showing a shift in life at home as well. COVID-19 has made renters increasingly more inclined to want to own rather than rent a home today (46% in wave one and 50% in wave two), representing potential new home demand of 7.6 million. Like homeowners, renters who are now more inclined to own overwhelmingly prefer single-family detached homes (72% in wave one and 74% in wave two).

"Between both surveys, it's clear Americans are transforming their present and future home needs and ideologies. The increased demand for new homes comes with a changing demand for what goes inside those new homes," said Keenan, CEO of DAHLIN Architecture and Planning, a firm widely recognized for sustainable design and diverse urban and suburban development. "Buyers want more storage space. They crave better technology. There's a palpable need for more multipurpose rooms and spaces that just work better. COVID-19 has made a lasting impact on the average American's way of living. Builders, developers, architects, renovators, designers and other home professionals can turn these new home demands into livable realities."

## **The Second Wave Brings New Findings**

The second wave of the America at Home Study took into account numerous new questions to provide deeper insights. The number of children and ages of children in each household were taken into account. For example, couples with kids are the largest group of renters now wanting to buy (60% vs. 50% overall). This group wants and is willing to pay for a better home office (54% vs. 44% overall), and one with a door and better soundproofing (50% vs. 39% overall). Respondents with children were also the largest group wanting and willing to pay for adaptive spaces and flexible walls (46% vs. 36% overall).

The second wave inquired about the biggest purchase respondents made since the pandemic began, with nearly 60% reporting their biggest purchase was home related. This indicates favorable future spending on new homes and new home upgrades.

The second wave also asked about how homeowners and renters prefer to research and purchase new homes and communities. A hybrid approach, both in-person and online, was preferred by most, with “self-guided” community tours and driving around on their own being the preferred shopping style across all groups. Millennial and Gen X homeowners are most comfortable with a fully virtual shopping and purchasing experience, at 58% and 49% respectively.

Respondents in wave two were also asked about their most important wellness topics. Financial wellbeing and emotional wellbeing both topped the list of importance at 83%, followed closely by mental health and engagement (80%) and physical health and fitness (76%). Although financial, emotional and physical wellbeing were viewed as some of the most important wellness priorities, they were also identified as points where respondents have the most room for personal improvement. Respondents indicated they weren’t as satisfied with these areas of their lives related to the level of importance they fulfill.

## **Reapproaching Community Design and Living**

In both surveys, respondents were questioned about their preferences for community features and design, identifying how important these factors play into their decision to buy or rent a new home.

From wave one to wave two, every community feature respondents were asked about saw an increase in importance, indicating pandemic-friendly community features will greatly persuade future buyers and renters. Nature and open space hikes and activities was added as an option in wave two, ultimately topping the list of important features at 59%. This shows a notable preference for access to outdoor spaces and nature.

The community features that saw the biggest increase include: dog parks (29% in wave one and 40% in wave two); small neighborhood parks (39% in wave one and 47% in wave two); health and wellness clinics (38% in wave one and 46% in wave two); healthcare through HOA or rental (33% in wave one and 46% in wave two); and community activities (34% in wave one and 43% in wave two).

“After spending months digging into our findings from wave one, we were able to get more granular with wave two,” said Sward, founder and chief strategist at Strategic Solutions Alliance. “Taking children, wellness, purchasing habits and lifestyle traits into account, and really being able to look at them by each different MindBase consumer segment, helps us understand the changing needs of Americans. We’re realizing that new homes have to incorporate flexible spaces that are still financially feasible and

promote enhanced emotional, mental and physical wellbeing. We can now rethink community spaces and design them with more outdoor activities and resources to help residents live safer and more fulfilled lives. We aren't just looking at individual home improvements. We're looking holistically at how people prefer to live in the world."

### **Coming Soon: The First America at Home Study Concept Home**

With such significant findings afoot, the America at Home Study founders are collaborating with private award-winning homebuilder Garman Homes to build a concept home using insights generated from both waves of the study and technology, and customer experience company Cecilian Partners will create new ways to demonstrate the home to the public virtually. The physical home is expected to break ground in January 2021 in the Chatham Park master plan in Pittsboro, NC, while an online experience and virtual model will be constructed and continually optimized based on real-time feedback from prospective homebuyers.

"The concept home, informed by the America at Home Study's consumer insights, will bring all of our ideas together in a finished product. It's exciting to put the "D" into R&D and raise the bar for modern living," said Slavik-Tsuyuki. "We're thrilled to bring real-time consumer insights about home and community to the industry. It's historically difficult to be involved in homebuilding research and development, but with the America at Home Study we know we're onto something special that will drastically improve living situations for millions of Americans."

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### **About The America at Home Study**

The America at Home Study was hosted online during the COVID-19 pandemic in two waves. The first wave took place April 23-30, 2020 with a nationally representative sample of 3,001 consumers 25-74 years of age with household incomes of \$50,000+. The second wave took place September 24 – November 6 with a nationally representative sample of 3,935 consumers in the same age and income brackets. The America at Home Study was spearheaded by marketing expert Teri Slavik-Tsuyuki of tst ink, consumer strategist Belinda Sward of Strategic Solutions Alliance, and architect Nancy Keenan, president and CEO of DAHLIN Group. The second wave was further enhanced with Kantar's [MindBase](#)<sup>®</sup> consumer attitudinal and generational segmentation, providing deeper insights across nine unique consumer targets and enabling potential for direct/digital activation and enhanced messaging. The results reveal Americans' desire for home purchases, how they feel about and live in their homes, and what changes they'd like as a direct result of sheltering in place. [www.americaathomestudy.com](http://www.americaathomestudy.com)

### **About Kantar**

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth. [MindBase](#)<sup>®</sup> is a consumer attitudinal segmentation scored on 250M U.S. adults, defining unique segments by attitudes and values. <https://www.kantar.com/>

<sup>1</sup> The first wave of the America at Home Study was a nationally representative survey, of 3,001 US adults, aged 25-74 years of age, with household income of \$50,000/year or more, conducted online April 23-30 with results analyzed in early May 2020.

<sup>2</sup> When compared to 2019 US Census household data