



# Survey Says: What Do Americans Really Want?

Claire Worshtil, Senior Program Manager,  
Land Use

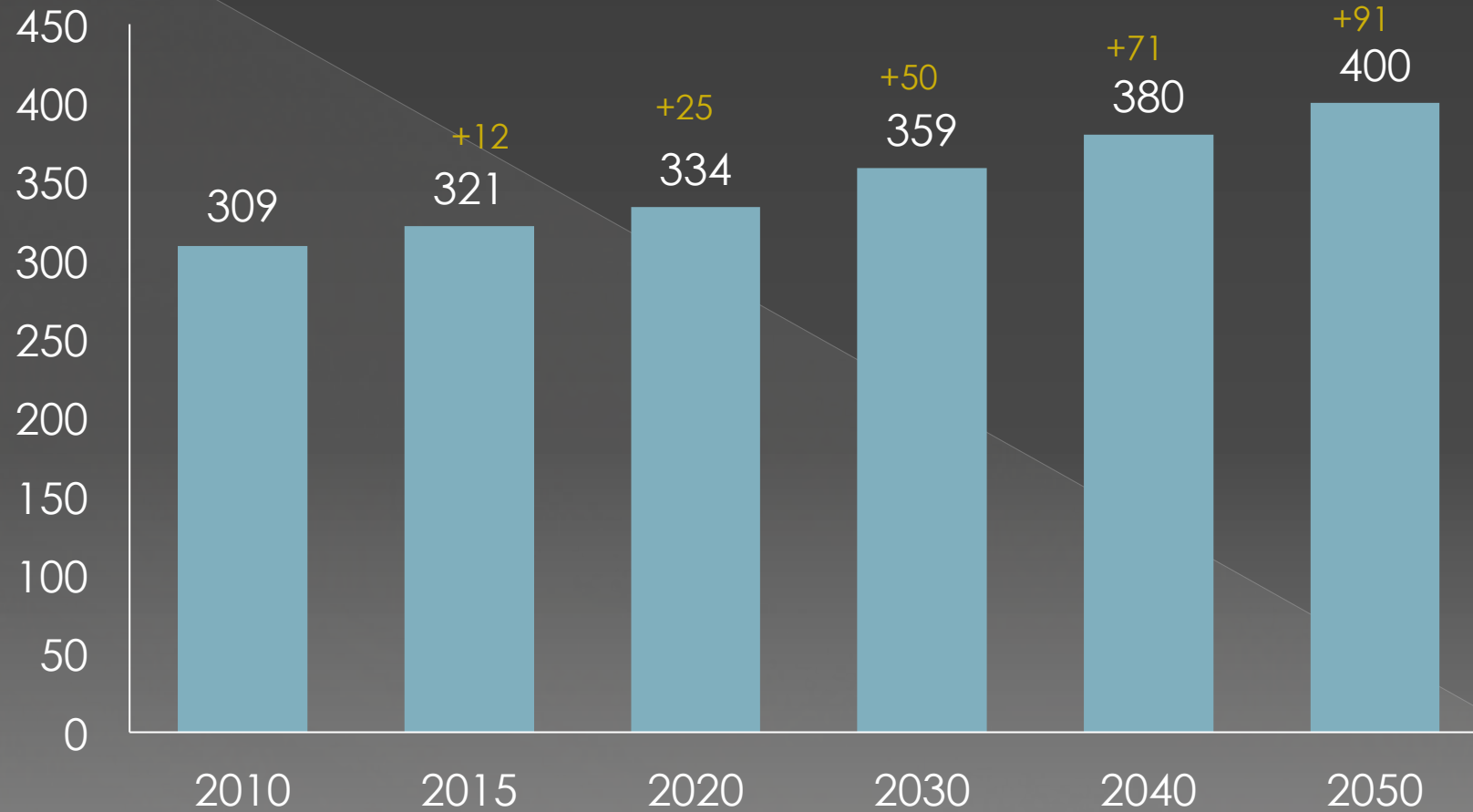
# Outline

- Statistics: What Do Homebuyers Want and Why?
- What's Trending Now? A look at Community Design Trends after the Great Recession

# Changes in US Population

# Population – Will Hit 400 Million by 2050

In Millions



Source: U.S. Census Bureau. National Population Projections.

## Population – Getting Older and more Diverse

	2010	2015	2020	2030
US Population (Millions)	309	321	334	359
<u>Race/Ethnicity</u>				
White (non-Hispanic)	64%	62%	60%	55%
Black (non-Hispanic)	13	12	13	13
Asian (non-Hispanic)	5	5	5	6
Hispanic/Latino*	16	18	19	22
<u>Age</u>				
55+	25%	28%	30%	31%
65+	13	15	17	20

*\*Hispanics/Latinos can be of any race.  
Source: U.S. Census Bureau.*

National Association of Home Builders

# HOUSING PREFERENCES OF THE BOOMER GENERATION

HOW THEY  
COMPARE TO  
OTHER HOME  
BUYERS



NAHB

RMF

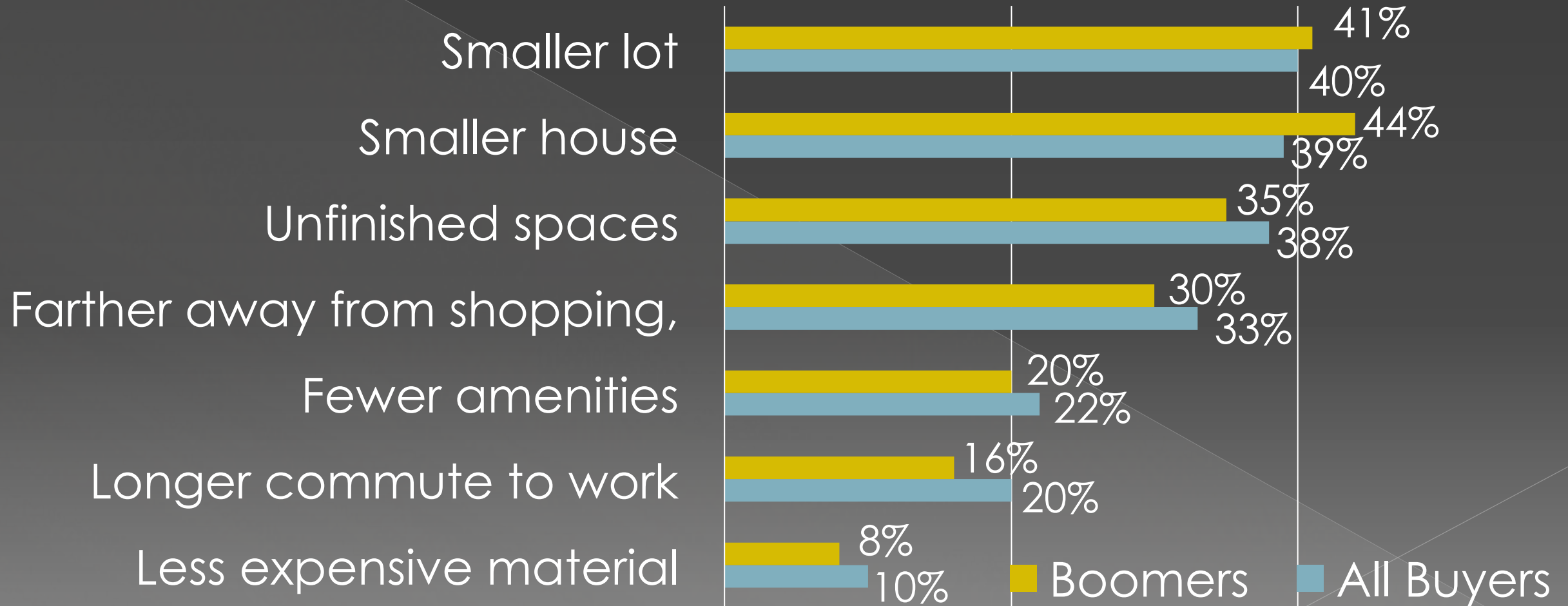
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- Survey results from over 4,300 recent and prospective buyers
- Emphasizes Boomers, but has results for all buyers irrespective of age
- Extensive chapter on community/development features

**Trade-Offs Buyers are Willing to Make**

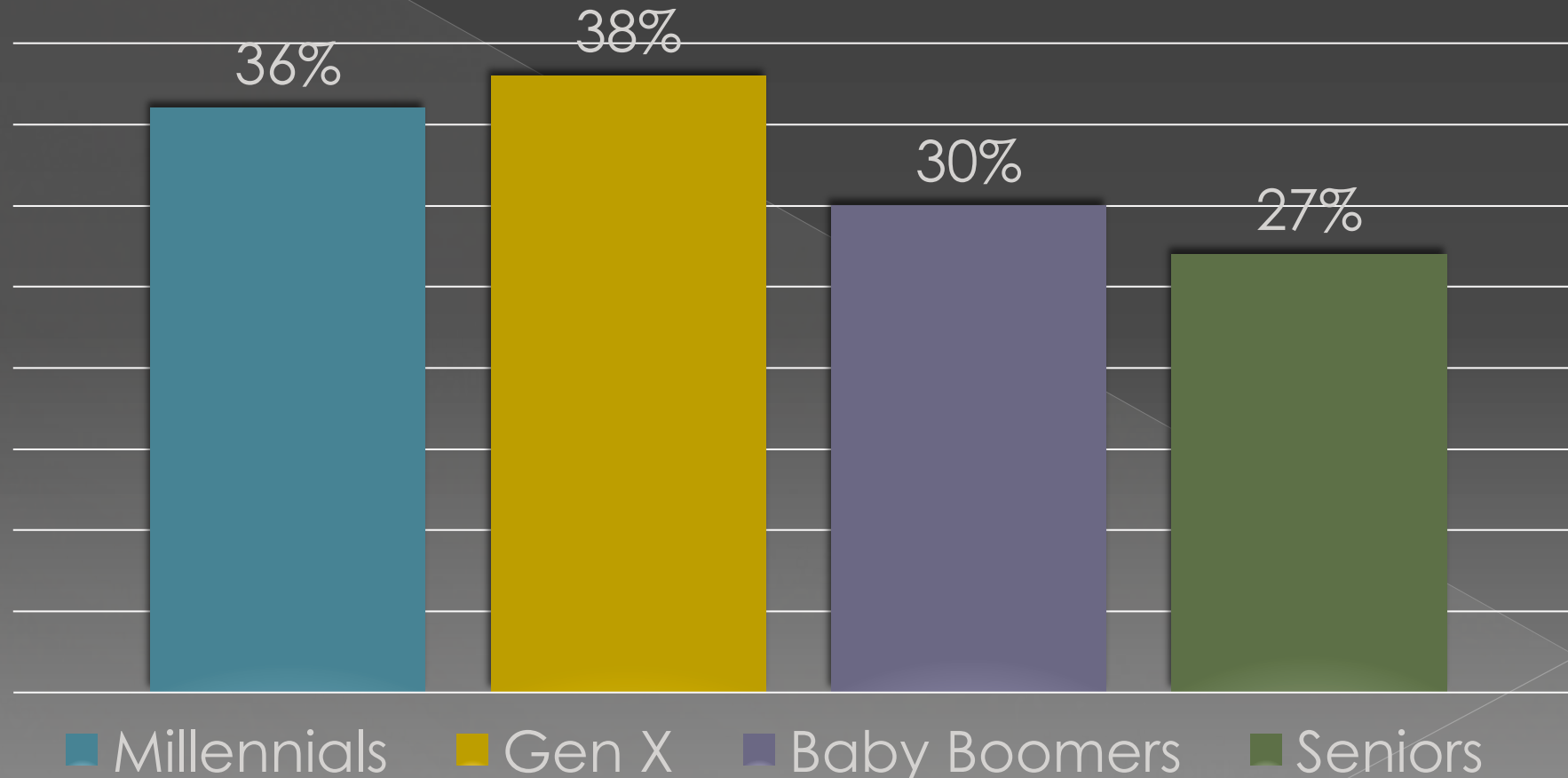


# As Land Costs Rise, More People Are Willing to Accept Smaller Lots

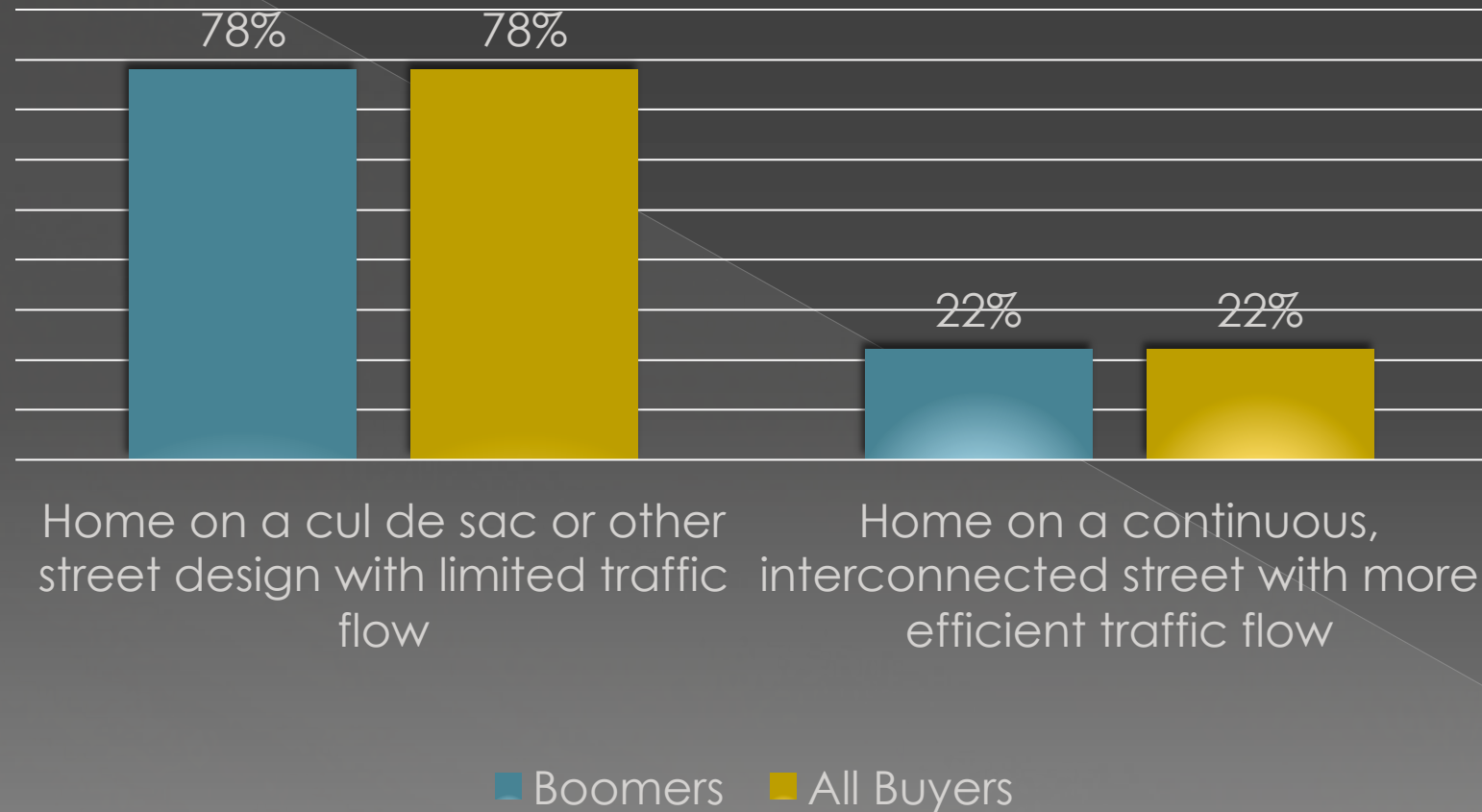




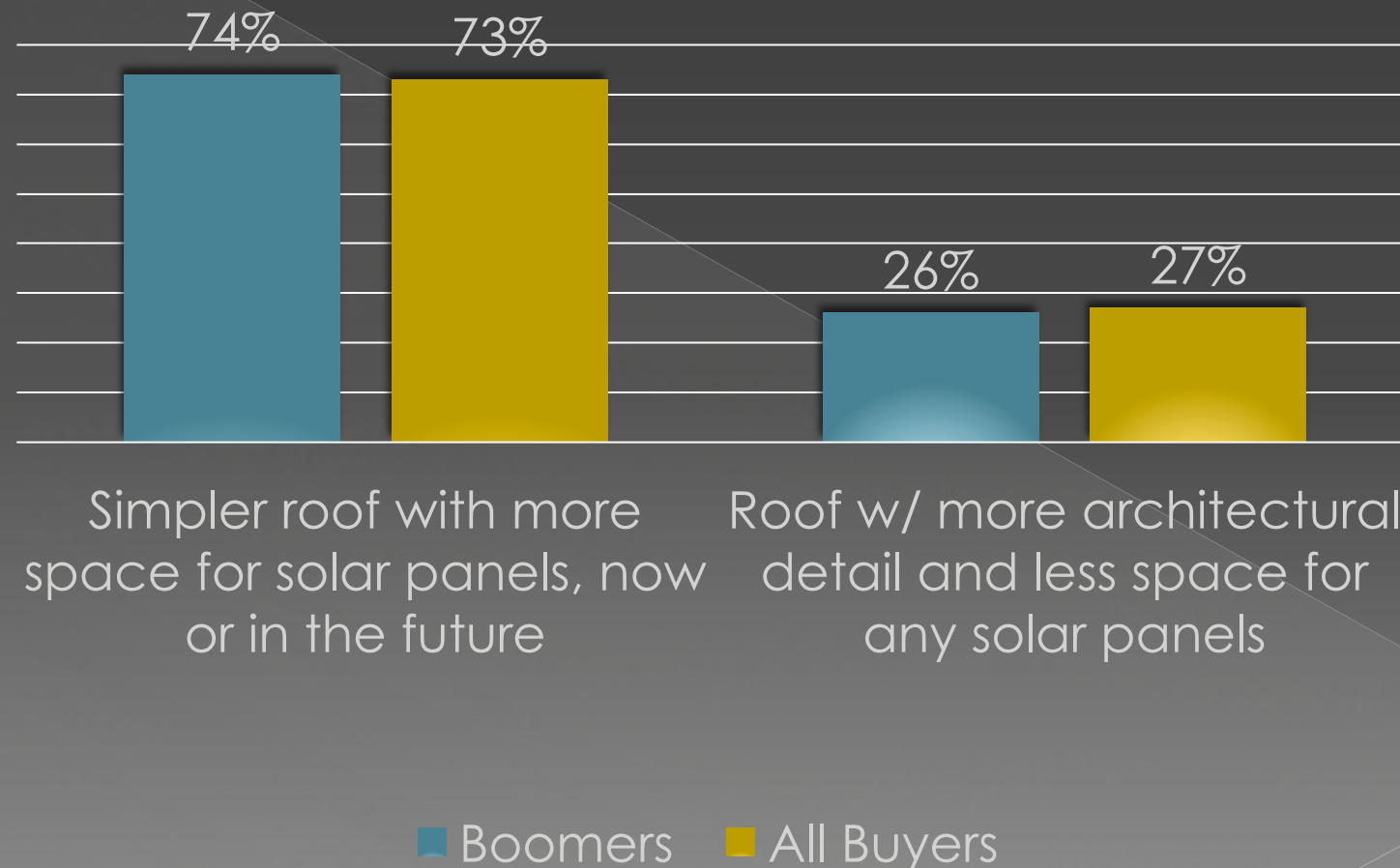
# Share of Buyers Willing to Accept a Home Farther Away from Shopping/Entertainment to Make it Affordable by Generation



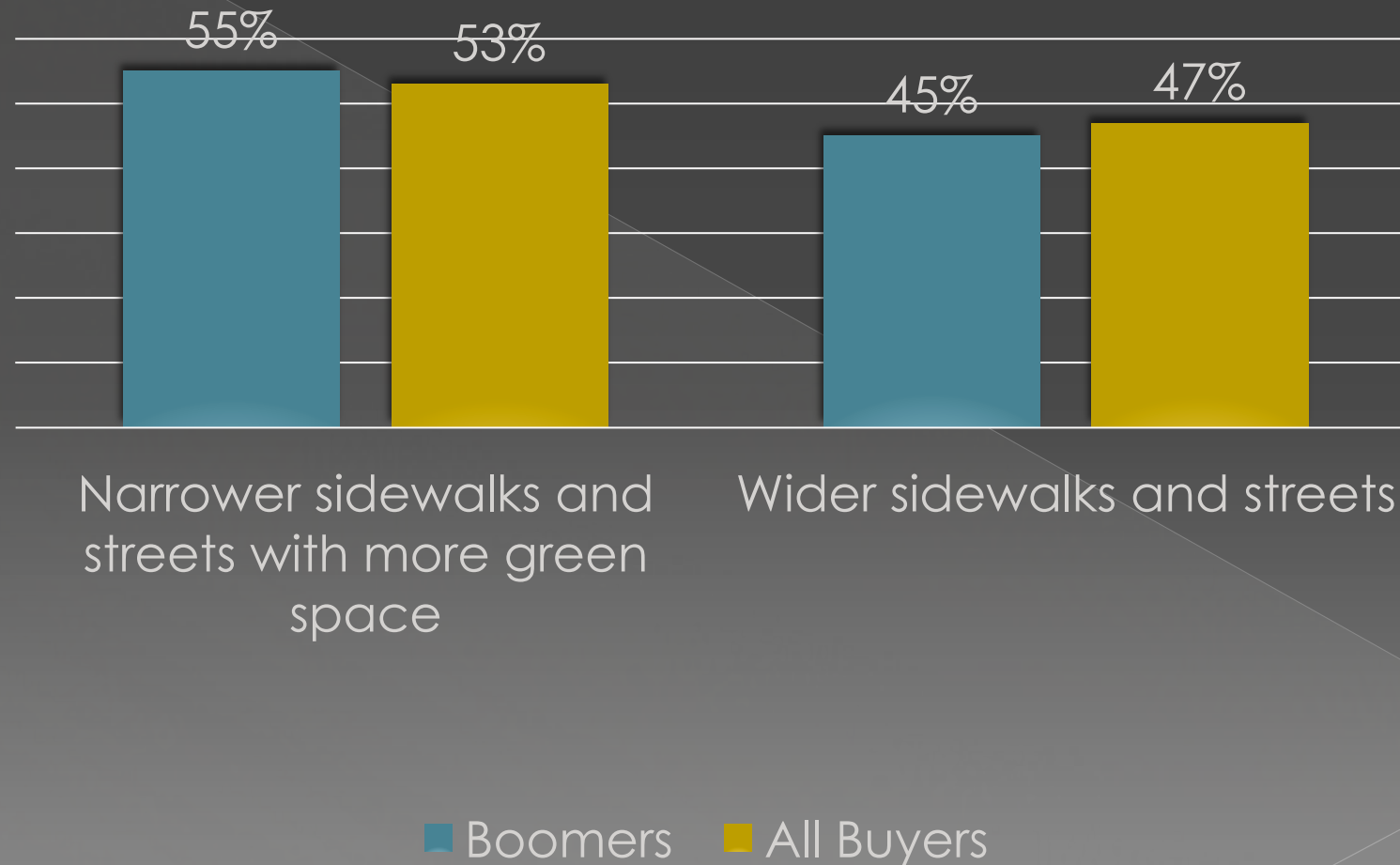
# Home Buyers Prefer Cul de Sacs and Simpler Roofs



# When Purchasing a New Home, Which Would You Prefer?



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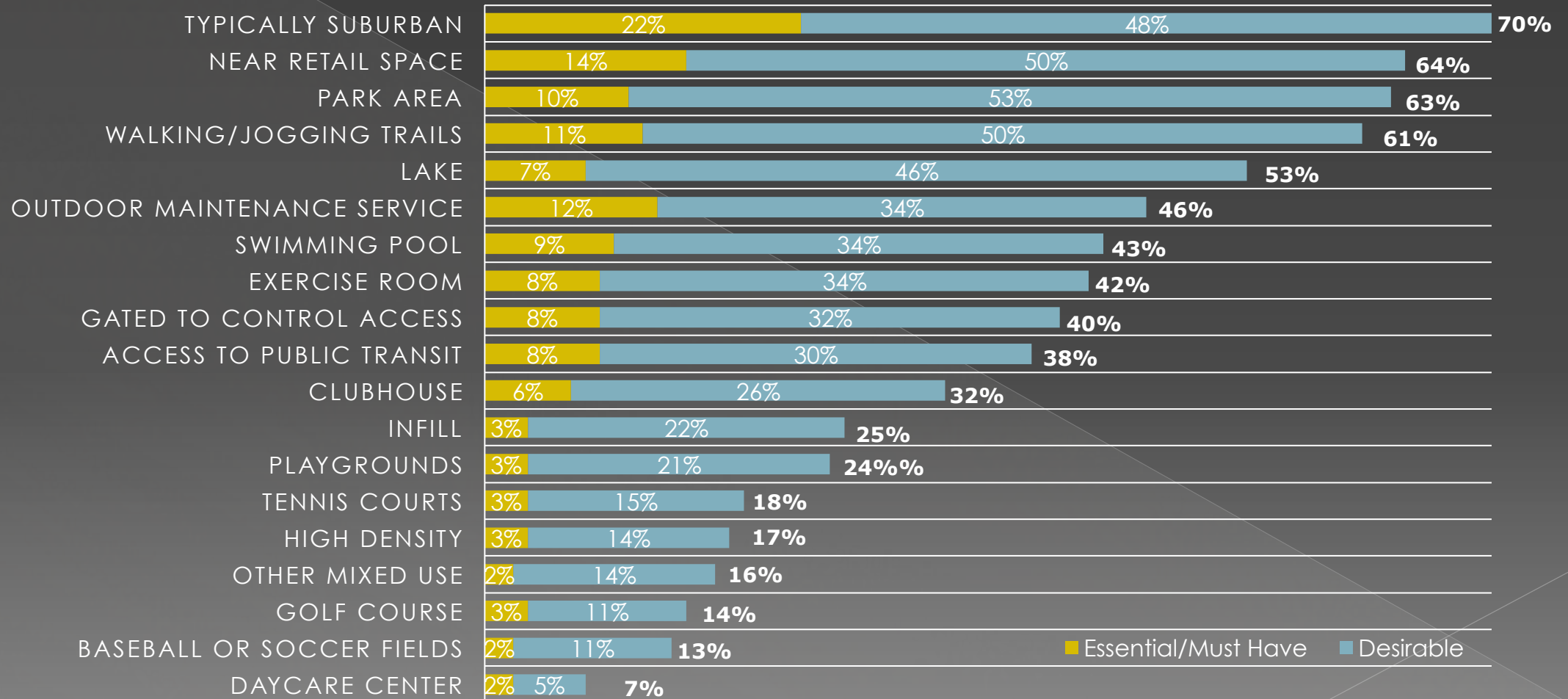
# Few Boomers or Other Home Buyers Prefer a Central City Location

## Preferred Location: History (Percent of Respondents)

	2007	2012	2015
<b>Baby Boomers</b>			
Rural	31	28	28
Outlying Suburb	35	37	35
Close-in Suburb	27	28	29
Central City	7	7	7
<b>All Home Buyers</b>			
Rural	28	27	27
Outlying Suburb	35	36	36
Close-in Suburb	30	30	30
Central City	7	8	8

- Essential/Must have – unlikely to buy a home without feature
  - Desirable – seriously influenced to buy home if feature is included
    - Indifferent – would not influence purchase decision
      - Do not want – not likely to buy a home with this feature

# Boomers Like Communities With Single-family Homes and Convenient Shopping

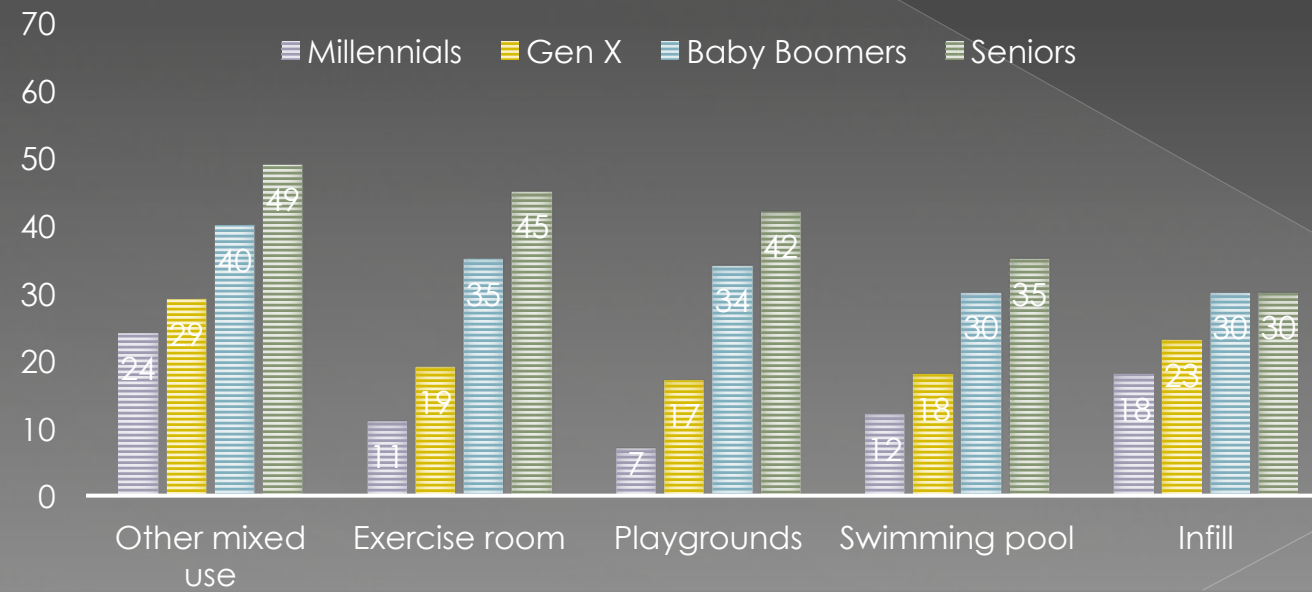
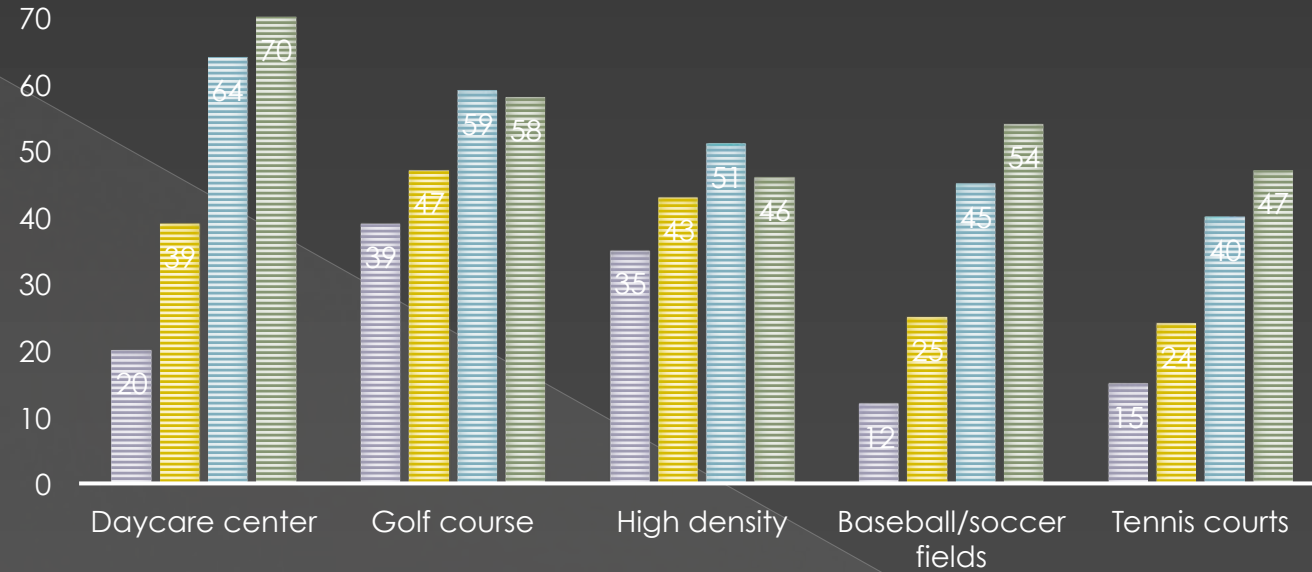




# Top Eight Community Features by Generation

	Millennials	Gen X	Baby Boomers	Seniors
1	Park area	Typically suburban	Typically suburban	Typically suburban
2	Typically suburban	Park area	Near retail space	Near retail space
3	Walking/jogging trails	Walking/jogging trails	Park area	Walking/jogging trails
4	Playgrounds	Near retail space	Walking/jogging trails	Park area
5	Near retail space	Lake	Lake	Outdoor maintenance service
6	Swimming pool	Swimming pool	Outdoor maintenance service	Lake
7	Lake	Exercise room	Swimming pool	Swimming pool
8	Exercise room	Playgrounds	Exercise room	Exercise room

# Boomers, Even More than Other Buyers, Reject High Density and Golf Courses



# Why Millennials Matter



# So What DO Home Buyers Want?

Single Family    **Small Town**    Walkable    **Multifamily**    Bike  
Lanes    Mixed Use    *Amenities*    Trails    Backyard    Front Yard  
City Living    Low Density    Affordable    Great Design    Transit  
Parks    Suburbs    Comprehensive Plan    Home Ownership  
**Rental**    Green    **Garages**    Good Schools



# CHOICE





# What's Trending Now

- Mix It Up Product Types, Price Points, And even builders!
- Say Goodbye to the Front Lawn
- Interior Courtyards
- What's Old is New
- It's All About the Street (Or Lack There of)
- Food!
- Detach From Your Garage
- The Eco-Residence



# Mix it up! Product Types, Price Points, Even Builders!



# Say Goodbye to the Front Lawn





# Interior Courtyards





# What's Old is New

Arts District Hyattsville  
Hyattsville, Md.



Arts District Hyattsville  
Hyattsville, Md.



Arts District Hyattsville  
Hyattsville, Md.



# It's All About the Street (Or Lack There of)

*Celebration  
Orlando, Fla.*



*Woodland's Edge  
Little Rock, Ark.*



# Food!

*The Pinehills  
Plymouth, Mass.*



*The Pinehills  
Plymouth, Mass.*





# Food!



Willowsford  
Ashburn, Va..



Willowsford  
Ashburn, Va..



# Detach From Your Garage





# The Eco-Residence





# Walden - Enola, Pa.



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# Village of Providence – Huntsville, Ala.





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# The Pinehills – Plymouth, Mass.





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# Questions?

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