NOVEMBER TRENDS REPORT

HEALTHY HOMES
Stealing Market Share from Resales

Including Results of our Survey of 1,240 Homeowners
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Stay ahead of the competition by capitalizing on **two consumer trends:**

**Heathy living**, which can be better supported by a newly built home

- **Air quality** and **humidity control**
- **Easier-to-clean** surfaces
- **Much safer materials**

**Home life**, which can be much higher quality in a newly built home

- **Restful sleep** in a superior bedroom
- Sensors that **detect maintenance issues** before things go wrong
Shift your Marketing: Keep / Stop / Start

- **Keep:** Focusing on **air quality** and even unhealthiness of resale homes

- **Start:** Marketing “**healthy homeowners**” rather than “healthy homes”

- **Stop:** Assuming consumers understand **certifications** and **healthy home standards**
Healthy living trends have massively accelerated.

Pop open the news any day of the week and you are sure to be inundated with stories of the external forces negatively impacting our health:

- **COVID-19** has wounded many through illness, stress, and the mental and physical impacts of spending large amounts of time indoors.

- **Wildfires** are devastating much of the West, coating the skies with smoke and ash, while **hurricanes** intensify in the South and East.

- Articles and documentaries on **processed foods** have proliferated, shining a spotlight on how what we consume impacts our health (with ever-changing instructions on how to optimize diet).

With all this media attention, health and wellness have climbed up our priority list. In this report we dive into the effects of this renewed interest in our well-being, assessing the level of consumer awareness and the impacts for home.
The focus on health has **surged**, particularly among young home buyers.

76% of homeowners are taking more steps to promote their physical health than they were a year ago. Mental health matters too: 69% are taking more steps to promote their mental health.

The trend is **particularly prevalent among young homeowners**. Over 80% of Young Singles and Couples are taking steps to improve their physical and mental well-being.

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I am taking more steps to promote my **physical** health than I was one year ago.

- 76%

I am taking more steps to promote my **mental** health than I was one year ago.

- 69%

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Pinterest reported **332% increase** in "self-care at-home" searches in April 2020.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents

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COVID-19 will temporarily hurt the desirability of urban living.

Urban areas are not ideal for pandemic living: density can lead to hotspots and small homes make sheltering in place suffocating. Thus, the desirability of urban living has fallen, but this impact will not result in any permanent mass exodus.

Our survey results showed that 61% of homeowners report that the COVID-19 pandemic has made urban areas less desirable to live in. We found this number surprisingly low, given that the perception of urban as less desirable is at its peak now and will only fade over time (learn more about the psychological principle supporting this to the right).

Further, parsing the data by neighborhood type shows that it is actually the groups living in rural and suburban locations that are driving the narrative that urban areas have lost their appeal. Only 51% of urban homeowners think urban has lost its appeal, compared to 76% of rural homeowners.

We believe that the most likely scenario to play out will be that those on the cusp of leaving urban areas (e.g., those starting a family) will be pushed over the edge by COVID-19. Any lasting migration to the suburbs will be driven by structural shifts like demographics and affordability, not by fear.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents

An important psychological principle from Nobel Prize winner Daniel Kahneman’s Thinking, Fast and Slow helps us understand the temporary nature of this shift in perception. The Focusing Illusion states that “nothing in life is as important as you think it is, while you are thinking about it”. Essentially, our heightened attention to something magnifies its importance. We are hyper aware of the downsides of urban living right now, making them seem disproportionally large. Our memories are short, so we should not discount the fact that, when the pandemic passes, fears will fade and the benefits that drove us to urban areas in the first place will remain.
Behavioral implications of **natural disasters** are short lived.

Despite the rising count of natural disasters, only 38% of homeowners are more concerned about the possibility of one than they were a year ago. We believe that this speaks to the short-lived nature of these behavioral consequences. Those who sell a product (e.g., air purifiers or impact-resistant windows) that can be immediately purchased to protect against the disaster often see a spike in sales when these events hit, yet large, lasting shifts (e.g., migration from an area) do not tend to follow.

There are notable differences by life stage: **just over half of Young Families and 47% of Young Singles and Couples are more concerned** about the possibility of natural disasters.

**Share of homeowners more concerned about the possibility of a natural disaster than one year ago:**

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Total</td>
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<tr>
<td>Young Single and Couples</td>
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<td>Mature Families</td>
<td>39%</td>
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<tr>
<td>Mature Singles and Couples</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents

**Local Insight:**

Every year when we have hurricanes, there are a plethora of media articles about whether people will stop moving to Florida, and every year that doesn’t happen.

**Lesley Deutch**  
**Boca Raton, Florida**  
ldeutch@realestateconsulting.com
How are builders now catering to health/wellness?
Truly health-centric homes are currently niche offerings. That may change.

Buyers often purchase new homes because they are energy efficient and perceived as “clean.” Most home builders market their homes as energy efficient and healthy. A home builder like Thrive seeking a premium for a superior healthy home really needs to play up the importance of features like superior indoor air quality. Given we’re all spending twice as much time at home now, the quality of our indoor environment is much more of a priority than it used to be.

**Chris Dorociak**
San Diego, CA
cdorociak@realestateconsulting.com

Houston has some healthy-home offerings, but for the most part, health is primarily addressed in the way that builders have drastically changed how air conditioning systems work and how tight the home gets built over the years.

**David Jarvis**
Houston, TX
djarvis@realestateconsulting.com

**Garbett Homes** is a boutique Utah builder who emphasizes health. Energy Recovery Ventilators (which bring in and precondition outdoor air) and radon mitigation systems are standard health products included in finished homes.

**Kristin Matthews**
Salt Lake City, UT
kmatthews@realestateconsulting.com
Remember to promote outdoor amenities in the community as healthy home features.

The focus in our market has really been more on the community itself and the location versus the home. With higher density in the Northeast and Mid Atlantic, the move has been to more suburban locations. **Willowsford** is a master-planned community that focuses on farming, wellness, and the outdoors. The community offers a public farm stand, weekly produce shares, educational programs, nature walks, trail management, camp sites, and open space management.

**Jeff Kottmeier**
Bethesda, MD
jkottmeier@realestateconsulting.com

Most of the homes I have seen that incorporate health and wellness as a major selling point are specialty builders with a small section in an MPC or neighborhood. The “health and wellness” aspect of Florida homes is really focused on the outdoor amenities, since you can be outside all year. (i.e., pools, trails, gyms, etc.)

**Oliver Radvin**
Boca Raton, FL
oradvin@realestateconsulting.com
Smart builders are trademarking healthy features and programs.

Taylor Morrison rolled out their LiveWell™ Home earlier this year. All to-be-built homes now include healthy home products with:
- whole home filtration
- smart thermostat technology
- advanced water filtration
- hands-free faucet
- low VOC paint

Meritage Homes files healthy home features under a bigger umbrella of energy efficiency. These features are rolled up into four branding messages of cost savings, better health, real comfort, and peace of mind. Built into the home to boost health are:
- MERV 8 HVAC filtration
- advanced thermostat
- indoor airPLUS certification
- spray foam insulation (reduces pests, mold, airborne pollutants)
- low- to zero-VOC materials, paints, stains, and adhesives

TRI Pointe created their LivingSmart® program to incorporate new technologies, materials, and features. Broken down into five areas, these additions support health, well-being, and the planet. HealthSmart® emphasizes:
- finished Products (low VOC, water-based finishes, paints, caulking, and adhesives)
- air Filtration (right sized HVAC and quiet bathroom fans with built in humidistat)
- air Quality (sealed combustion furnace and central vacuum system)
Consumer Perception of Healthy Homes
If building a healthy home, easy-to-clean surfaces and sleep-inducing bedrooms should be part of the package too.

When asked what they would require of a healthy home, homeowners give a wide range of answers, signaling that “healthy home” means very different things to different people. However, the majority agree that a healthy home needs to have air filtration/purification and humidity control—two often-included features—but also easy-to-clean surfaces and bedrooms designed for restful sleep, which are not typically included/marketed.

Interestingly, low VOC and touchless (two common healthy home inclusions) ranked low, with only about 1 in 5 homeowners including them as a necessity for a healthy home. Our survey results also showed that fewer than half of homeowners think that touchless is worth the extra cost. While we do expect touchless to grow, it currently does not resonate as a health feature as much as easy-to-clean surfaces (which touchless can be sold as), products that help us sleep better (e.g., circadian lighting), or surfaces that repel germs/viruses/bacteria.

Read more about touchless products in our appendix.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents

Which of the following would you require of a home for you to consider it to be a “healthy home”?

- Air filtration / purification: 58%
- Easy-to-clean surfaces: 57%
- Humidity control to prevent mold: 53%
- Bedrooms designed for restful sleep: 53%
- Walkable community: 35%
- Surfaces that repel germs/viruses/bacteria: 34%
- Age-in-place features: 28%
- Low VOC paints and finishes: 21%
- Home gym: 20%
- Touchless plumbing or light switches: 19%
- Organic or natural materials: 19%
- Brand new: 16%
- Includes a “wellness room”: 15%

When asked which feature is the most important, air filtration and purification was the clear winner.
Home buyers do not realize how bad resale air quality is.

Homeowners seem to realize that air quality is essential to a healthy home (air quality was the most commonly required feature), yet among all groups but the Young Families, concern levels about current home air quality are relatively low. This—put beside the growing overall concern with health—signals a limited awareness of the poor quality of the typical resale home's air.

Education about the positive benefits of air filtration and purification need to be coupled with an understanding of how bad their current home air quality is. Otherwise, home buyers will assume their current air is good enough and will be less willing to pay a premium.

Americans spend 90% of their time indoors where the concentration of pollutants are often 2x–5x higher than outdoors.¹

Are you generally concerned about the air quality inside your home? Excluding homeowners with air filtration/purification devices (8% of homeowners)

<table>
<thead>
<tr>
<th></th>
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<th>Slightly concerned</th>
<th>Moderately concerned</th>
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<tr>
<td>Total</td>
<td>10%</td>
<td>24%</td>
<td>27%</td>
<td>8%</td>
</tr>
<tr>
<td>Young Singles and Couples</td>
<td>10%</td>
<td>19%</td>
<td>26%</td>
<td>6%</td>
</tr>
<tr>
<td>Young Families</td>
<td>27%</td>
<td>43%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>Mature Families</td>
<td>8%</td>
<td>43%</td>
<td>43%</td>
<td>23%</td>
</tr>
<tr>
<td>Matures Singles and Couples</td>
<td>6%</td>
<td>23%</td>
<td>28%</td>
<td>24%</td>
</tr>
</tbody>
</table>

¹https://www.epa.gov/report-environment/indoor-air-quality

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Home buyers currently place more value on home features that promote **energy efficiency** than those that promote **health**.

69% of homeowners indicate that they find home features that promote energy efficiency to be more important than those that promote health. This can most likely be attributed to cost savings: energy efficient features offset themselves through lowered utility bills.

**The benefits of a healthy home are less tangible and more gradual.** For this reason, we believe products should include a feature that makes the benefit more immediate and more concrete. Think about the appeal of a Fitbit: the added health benefit from owning one becomes immediately apparent as you track steps and are congratulated for hitting goals.

**Life Stage Differences**

The preference for energy-efficient features over health ones is most pronounced in the Mature Singles and Couples group. Young Families are the most concerned with home health, with 40% indicating that they find home health more important.

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**Which type of home features are more important to you?**

- **Those that Promote Energy Efficiency**
- **Those that Promote Health**

![Bar chart showing preferences by life stage](chart.png)

- **Total**: 69% energy efficiency, 31% health
- **Young Singles and Couples**: 67% energy efficiency, 33% health
- **Young Families**: 57% energy efficiency, 43% health
- **Mature Families and Couples**: 68% energy efficiency, 32% health
- **Mature Families**: 73% energy efficiency, 27% health

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Certifications do not hold much value for homeowners.

Only 5%–15% of homeowners would value a home substantially more if it had certifications like a low HERS Score, Indoor AirPlus, or LEED. Indoor AirPlus is the most widely known certification and the most valued (57% would value a home at least slightly more). Because many are not familiar with these certifications, it is a waste to include them in marketing materials without fully explaining what they mean. To achieve a premium, education around the implications of these certifications is necessary.

In line with our other results, Young Families are the most familiar with all three certifications and would place the most value on them.

Would you consider a home to be more valuable if it had any of the following features?

- **Low HERS Score**
  - Not familiar with this: 59%
  - Would not value more: 11%
  - Would value slightly more: 24%
  - Would value substantially more: 5%

- **Indoor AirPlus**
  - Not familiar with this: 32%
  - Would not value more: 10%
  - Would value slightly more: 42%
  - Would value substantially more: 15%

- **LEED Certified**
  - Not familiar with this: 49%
  - Would not value more: 10%
  - Would value slightly more: 33%
  - Would value substantially more: 8%

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Education is key.

Homeowners are taking steps to improve their health, yet they are not quite understanding how important a role their home plays. To connect these dots, homeowners need education in the following format:

1. **Give them the “why.”**
   It is not enough to list features; consumers need to know why they matter. Most homeowners read “kitchen and bathroom ventilation” and assume odor prevention. They do not realize that it also prevents walls from being covered in grease over time and mold/mildew from growing.1

2. **Make it easy to understand.**
   Tightly sealed envelopes make a huge difference for healthy homes by keeping impurities out. Unfortunately, this benefit is invisible to the shopper. Consider how easy-to-understand graphics or displays (like the David Weekley model home to the right) that compare/contrast your product versus your competitors can make the decision more obvious.

3. **Make it memorable.**
   Health is an emotional subject, making compelling messaging simple. Get to the heart of why wellness matters to them and center your messaging on that. See Thrive Home Builders’ ad on the right for an example of this.

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1Design Milk
Promote “healthy homeowners” or “healthy families” rather than “healthy homes” to focus on what really matters.

A healthy home does nothing if the occupant does not take advantage of (and maintain) its features. Aside from putting the right pieces in place, consider how you can support a healthier lifestyle for the home occupants to truly create a healthier home. Systems should be simple enough for the occupant to operate easily, or else they won’t get used. Maintenance service and automatic sensors (e.g., for ventilation) can also benefit the forgetful. These features will resonate more than simply including a kit of “healthy home” parts.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Smart home “health” technology is not the answer to keeping homeowners healthy—yet.

Homeowners are ready for embedded sensors tracking maintenance issues, but not ready for homes to track their health. 49% of homeowners report that sensors embedded in the home to detect maintenance issues are something they would use now or already use, a similar share to those who would use/already use virtual assistants. Only a quarter are ready for health-tracking sensors.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Design and Product Inspiration
Communities, homes, and products are being designed to support health, physically and mentally.

Supporting Physical Health:
Indoor air quality enhancements, low-chemical materials, and active-lifestyle amenities are all ways of creating greater physical health.

**Community**

**Bexley Masterplan by Newland Communities** in Land O’ Lakes, Florida, was designed to encourage residents to get out and enjoy the outdoors with 1,200 acres or open space and Avid trails complete with Avid Fit Stations (seen here) along the way. Located adjacent to a “super-highway” for bike enthusiasts, Bexley embraced a bicycle focus with an on-site bike shop and a BMX bike pump track.

**Home**

**Avance** in Phoenix, Arizona has been one of **Maracay Homes** (a member of TRI Pointe Group) fastest selling communities, including four single-family detached collections ranging from 2,076 up to 4,620. All homes are LEED and EnergyStar certified. Maracay’s proprietary LivingSmart program and the EPA’s Indoor airPlus program add an extra layer of high performance and health.

**Product**

Our obsession with health metrics is leading to a desire for smart monitors for home air (don’t just purify my air, tell me exactly down to the particle what its status is). As smart technologies begin to fully integrate, whole-home management systems (like Darwin, below) that seamlessly monitor and optimize conditions within the home will become standard.
Supporting Mental Health:
Access to nature, sun exposure, communal spaces that combat isolation, and features that promote sleep all contribute to greater mental health.

**Community**
Fitness and a sense of community help support mental health. Hillwood Communities supports mental health at the master-planned community of Harvest in Argyle, Texas with a yoga lawn and plenty of community events at places like the Barn to bring people together.

**Home**
Research shows a correlation between our health and factors such as providing adequate daylight and views to nature. Wonderland Homes’ Downtown Superior Townhomes in Superior, Colorado, provide both. Two-story volume, plentiful windows, and a skylight fill the great room with light.

**Product**
Marvin Skycove, Best Indoor Product Winner at IBS 2020, is a pop-out glass box structure with an integrated bench. Protruding outward, the Skycove enhances the feeling that you are within nature, facilitating a connection to the outdoors.

The Skycove works great in smaller spaces where you can’t fit a breakfast nook, encouraging residents to gather in the cozy nook. Apart from being a hangout spot, the expansive window brings sunlight into the home.
Design Inspiration: Healthy Home Features

There is a growing infatuation with getting better sleep, evidenced by the proliferation of sleep trackers and apps, bedtime podcasts and ASMR videos, and sleep tools like weighted blankets and cooling pillows. People are even willing to sleep in separate bedrooms for a better night's rest. At our 2020 Design Summit, Dan Swift of BSB Design shared 28% of parties in the US don’t sleep in the same room, advising a snore room connected to the master bath. Acoustics play an important role in health so ensure that bedrooms are appropriately soundproofed. Circadian lighting sets us up for better sleep too.

Other characteristics shared by Dan Swift that are crucial for a good night’s rest:
1. Perfect air quality
2. Total darkness
3. Perfect temperature

Easy-to-Clean Surfaces

As awareness of the importance of a clean home is rising, the time we have available to clean is falling. Demographic shifts have boosted the need for easy cleaning: an aging population in search of lower maintenance living, more dual income households with less time, and a generation of young adults who were kept so busy with SAT prep and extracurriculars that they never learned many basic household chores.

Small considerations add up: a matte finish can save time scrubbing water spots and flat-panel doors minimize the number of grooves that require dusting. Surface protectants can make cleaning glass, countertops, and grout easier.

Bedrooms Designed for Restful Sleep

The majority of homeowners believe that easy-to-clean surfaces and bedrooms designed for restful sleep are requirements of a healthy home (57% and 53%, respectively), yet healthy home packages rarely include and market these features. These results highlight an opportunity to create and include more products that help us sleep better and make cleanup easier.
Design Inspiration: Healthy Home Features

Walkable Community
Just over 1 in 3 shoppers feel that a walkable community should be required of a healthy home. Check out the Laureate Park neighborhood of Lake Nona. Not only is the neighborhood adjacent to the Lake Nona town center with walkable retail and restaurants, the overall community includes multiple employment opportunities, so residents can walk to work.

Age-in-Place Features
While most important to Mature Singles and Couples, accessible designs should be an aspiration for all. The Cannery required every home—attached or detached—be designed with Universal Design, so buyers young and mature could thrive in their homes.

Home Gym and Wellness Room
Home gyms and wellness rooms are typically not necessities for healthy homes, but both are still great ways to merchandize flex spaces in a model to highlight inspirational uses for the home. The largest plan at The Que at Vibe included a loft merchandised as a home gym by Chameleon Design. At Summit Collection at the Regency, CDC Designs merchandized the den as a wellness room complete with massage tables and sauna. Relaxation spaces like these should be suitably soundproofed.

Lake Nona Masterplan by Tavistock Development
Masterplan community with an emphasis on health, art, and technology in Orlando, FL

The Cannery by The New Home Company
California’s first farm-to-table masterplan located in Davis, CA

The Que at Vibe by Woodbridge Pacific Group
5-plex clusters mix duplexes with detached homes in Palm Springs, CA

Summit Collection at Regency by Toll Brothers
Age-qualified single-family detached homes in Las Vegas, NV
While niche now, we are keeping an eye on the maintenance/health sensors coming to market.

**Maintenance Sensors:**
Lennar and Flo by Moen

Lennar has partnered with Moen to introduce smart water technology into newly constructed homes. Flo by Moen monitors water usage in real time, sending updates to homeowners’ phones. When water leakage occurs, Flo by Moen’s Smart Water Shutoff system acts automatically. These features are estimated to decrease the amount paid in water claim insurance by 96%. Additional benefits include the ability to set goals for water conservation and provide all-around control over water usage.

**Health Sensors:**
SensFloor®

SensFloor® is ideal for elderly individuals living alone or those with health concerns (e.g., seizures) that need regular monitoring. This smart underlay embedded with sensors detects falls and automatically notifies caregivers or emergency contacts. It can be installed underneath nearly any flooring including PVC, carpet, or laminate. The system can differentiate between a person standing and lying on the floor and even monitors number of people, their direction, and their speed.

**Smart Mirrors:**
CareOS Smart Mirror

A CES 2020 Innovation Awards Honoree, this smart mirror tracks and analyzes skin details, gamifies hygiene, adapts lighting to your mood, provides vision tests, assesses posture, senses trends for your weight, and more. Cognizant of the privacy concerns that come with smart technology, the mirror comes with a manual lens cover, and all data is stored locally into the mirror.

**Telemedicine**
CC Homes and Baptist Health

Florida-based single-family home developer, CC Homes partnered with Baptist Health to provide private on-site health care. CC Homes will provide one year of Baptist’s Care on Demand for new buyers in its Canarias at Downtown Doral and Maple Ridge at Ave Maria projects. Residents will be provided TytoCare health kits that include an exam camera, thermometer, and adapters to check ears, heart, lungs, and throat. With this telemedicine technology, new buyers can meet virtually with Baptist Health physicians.
Survey Methodology

In October, we surveyed 1,240 respondents matching the following characteristics. Responses were weighted nationally by region and life stage group.

**LIFE STAGES**

- **Homeowners**
- **Attached or Detached**
- **Household Income $50k+**

- **Young Singles and Couples**
  - Young single or couple (under age 45) with no children in the household

- **Young Families**
  - Family with children in the household, all under age 12

- **Mature Families**
  - Family with children in the household, some (or all) older than age 12 (including adult children)

- **Mature Singles and Couples**
  - Mature single or couple (age 45+) with no children in the household
Which of the following would you require of a home for you to consider it to be a “healthy home”?

The top 5 priorities are relatively stable by life stage, but as we get further down the list of requirements, differing preferences emerge. Home gym is a requirement of almost a third of the young cohorts, while age-in-place features are required by almost a third of the mature homeowner cohorts. “Wellness rooms” capture over a quarter of Young Families but rank last among mature groups.

<table>
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<tbody>
<tr>
<td>Easy-to-clean surfaces</td>
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<td>58%</td>
<td>58%</td>
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<tr>
<td>Air filtration/purification</td>
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<td>Bedrooms designed for restful sleep</td>
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<td>53%</td>
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<td>Humidity control to prevent mold</td>
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<td>19%</td>
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<td>12%</td>
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</table>

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Most homeowners would not pay extra for touchless.

Fewer than half of homeowners feel that touchless features are worth paying extra for. Thus, while we will see a rise in adoption post-COVID-19 and beyond, touchless will not become the overnight “must have” health feature that many are speculating it will, and builders should still do their research before automatically including it.

Kitchen and bath products benefit most from being touchless.

For which of the following products is “touchless” worth paying extra?

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Toilet</td>
<td>47%</td>
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<tr>
<td>Kitchen faucet</td>
<td>47%</td>
</tr>
<tr>
<td>Bathroom faucet</td>
<td>40%</td>
</tr>
<tr>
<td>Light switches</td>
<td>35%</td>
</tr>
<tr>
<td>Elevator (Shared)</td>
<td>29%</td>
</tr>
<tr>
<td>Front door lock</td>
<td>22%</td>
</tr>
<tr>
<td>Interior door</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents

Kohler’s intelligent toilet has a bidet, nightlight, heated seat, air dryer, deodorizing seat, and a touchless lid and flush. It can also be controlled via touch screen remote.
Younger homeowners will be heavier adopters of tech, including health and maintenance tech.

Source: John Burns Real Estate Consulting, LLC, October survey of 1,240 respondents
Contact

Mikaela Sharp
Manager, Trends and Innovation
msharp@realestateconsulting.com
(949) 870 – 1203

Jenni Lantz
Senior Manager, DesignLens
jlantz@realestateconsulting.com
(720) 328 – 1530

Anja Seng
Research Analyst
aseng@realestateconsulting.com
(949) 870 – 1260