Outdoor Spaces Part 1: Importance, Size, and Function

Including results from our October 2021 survey of 1,184 homeowners with homes containing outdoor space.
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Key Findings for Outdoor Spaces

Over two-thirds of homeowners—at any life stage—use their outdoor spaces at least a few times a week. Outdoor spaces matter more...

- **When your target buyer is Families.**
  - 65% of family homeowners say that their home’s outdoor spaces are very important to them, compared to 44% of Young Singles and Couples.

- **Post pandemic.**
  - Two-thirds or more of young and family homeowners say that the pandemic has made their outdoor spaces more important to them.
  - A third of young homeowners (singles, couples, and families) remodeled their outdoor spaces since the pandemic began.
  - Remote work enables workers to utilize outdoor space during the workday, not just after work or on the weekend.

While having connection to the outdoors is important, size matters less than function. Only 14% of homeowners would trade some interior space to get more outdoor space.
**Key Findings** for Outdoor Spaces

Outdoor kitchens and entertainment-centric yards increase the value of small outdoor spaces by making them an extension of the most valued part of the home (the kitchen).

- Consumer preferences, remodeling plans, and architectural designer forecasts signal growth in outdoor kitchens.

**Focus on outdoor materials that are low maintenance and durable.**

- Homeowners rank these priorities highest when selecting outdoor materials.
- Architectural designers consider durability more important than cost for roofing, envelope, doors/windows, and hardscaping.
Outdoor Space Importance
Outdoor spaces are used frequently by homeowners at all life stages. Over two-thirds of homeowners use their outdoor spaces multiple times per week, regardless of life stage. Over one-third uses them many times per week.

Homeowners’ typical usage frequency of outdoor spaces
Excluding months with harsh weather (if applicable)

- Young Singles and Couples:
  - Many times per week: 35%
  - A few times per week: 33%
  - A few times per month: 19%
  - About once a month: 6%
  - A few times per year or less: 5%
  - Never: 5%

- Young Families:
  - Many times per week: 42%
  - A few times per week: 34%
  - A few times per month: 17%
  - About once a month: 4%
  - A few times per year or less: 4%
  - Never: 3%

- Mature Families:
  - Many times per week: 39%
  - A few times per week: 32%
  - A few times per month: 16%
  - About once a month: 4%
  - A few times per year or less: 6%
  - Never: 9%

- Mature Singles and Couples:
  - Many times per week: 37%
  - A few times per week: 32%
  - A few times per month: 14%
  - About once a month: 3%
  - A few times per year or less: 3%
  - Never: 9%

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Families value their outdoor spaces the most, even though all life stages use these spaces regularly.

Homeowner rating of the importance of their home’s outdoor spaces

- **Young Singles and Couples**
  - Very important: 44%
  - Important: 39%
  - Neutral: 14%
  - Unimportant: 3%
  - Very unimportant: 1%

- **Young Families**
  - Very important: 65%
  - Important: 26%
  - Neutral: 6%
  - Unimportant: 2%
  - Very unimportant: 1%

- **Mature Families**
  - Very important: 65%
  - Important: 26%
  - Neutral: 7%
  - Unimportant: 2%
  - Very unimportant: 1%

- **Mature Singles and Couples**
  - Very important: 55%
  - Important: 31%
  - Neutral: 10%
  - Unimportant: 2%
  - Very unimportant: 2%

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Function matters more than size. Only 14% of homeowners would **trade interior space** for larger outdoor space.

When presented with what they would realistically have to give up—bonus room or den/office, bedroom, garage space, or formal living/dining room—3% of homeowners changed their mind, dropping the total share to 11%.

**Who is more willing to trade off?**

- Young homeowners (20%–24% would)
- Urban homeowners (30% would)
- Homeowners with homes 3,000–4,000 square feet (25% would)

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
The community can become an extension of the backyard.

Cobalt at Esencia, and particularly Plan 1, features a unique combination of outdoor opportunities:

- **Small personal space:** A micro patio at the rear of the house provides small but private outdoor space.
- **Flexible second option:** The design team integrated carports to break up the street scene, creating an optional secondary outdoor space for those that choose it.
- **Shared community space:** Homes in Cobalt back up to the nearby Esencia amenity—The Hangout—which gives residents access to a pond, fire pits, BBQs, and a covered venue for events and performances.

[Read more here.](#)
Outdoor spaces can achieve greater value by enhancing—and connecting to—the kitchen.

Our October 2021 Home Buyer Preferences Report showed that the kitchen is homeowners’ most valued space in the home, followed by the family room and great room.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC June 2021 survey of 1,242 homeowners with a net worth of $100K+ (excluding those who never plan to move).
Outdoor kitchens and entertainment-centric yards that extend the most valued part of the home are increasingly used to boost the appeal of small outdoor spaces—at multiple price points.

The yard in Retreats at Haven extends the cooking and entertaining opportunities of the home, flowing from the great room to the outdoors. [Read more here.]

Harbor View is luxury, with starting prices over $1.3M for a 3,000 square foot lot. Despite being small, ground-floor yard space is maximized for cooking and entertaining with built-in gathering areas seamlessly connected to indoor dining. [Read more here.]
In the right markets, homeowners will trade ground-floor outdoor space for **elevated decks** off the kitchen or great room.

“Our sales team hears from homeowners that they love the big balcony off the upstairs great room, potentially even more than the ground-floor covered patio. Scenic views of Mt. Diablo make this a perfect spot for entertaining on beautiful Saturday evenings.”

 Coleen Franek | Marketing Coordinator
Brookfield Residential, Northern California

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Mulholland at Boulevard
Brookfield Residential
Dublin, CA
Remodeling plans support expected growth in outdoor kitchens and entertainment spaces.

Homeowners would prioritize lounging/gathering, privacy, and cooking/dining when remodeling their outdoor spaces. Outdoor kitchens and covered outdoor dining serve all these functions.

Share of homeowners who would prioritize each function in an outdoor-space remodel:

- Lounging/gathering space: 46%
- Private space (neighbors cannot see in): 36%
- Cooking/dining space: 34%
- No specific function, just nice to look at: 31%
- Weatherproofed space (shade, heaters, etc.): 26%
- Recreation/hobby space (e.g., pool, sport court): 17%
- Children’s play space (e.g., lawn, jungle gym): 9%
- Other: 6%
- Fitness space: 5%

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Our Annual Survey of Architecture similarly forecasts continued growth in entertainment-centric yards.

Architectural designers surveyed in 2021 say that over the next three years...

Designing great outdoor entertainment spaces will become a bigger focus than designing great indoor ones.

Firepits/fireplaces and outdoor kitchens will continue to accelerate:
- 73% of architectural designers most often included firepits/fireplaces in their drawings in 2020.
- 68% most often included outdoor kitchens.

Source: 2021 Annual Survey of Architecture conducted by the New Home Trends Institute by John Burns Real Estate Consulting, LLC and Pro Builder.
Very few households currently have an outdoor kitchen or bar.

The low share of households with these features, combined with the high share of homeowners and architects that plan/desire to add them, signals high potential growth.

### Outdoor features in homeowners’ homes

- **Grill/BBQ/pizza oven**: 65%
- **Firepit/fireplace**: 42%
- **Pool**: 18%
- **Water feature (pond, fountain, etc.)**: 16%
- **Game lawn (mini golf, bocce, etc.)**: 8%
- **Spa**: 7%
- **Sport court (basketball, tennis, etc.)**: 5%
- **Outdoor bar**: 4%
- **Outdoor kitchen**: 4%

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
In addition to a BBQ or smoker, the majority of outdoor kitchens/bars contain a prep island and a sink.

Two kitchens (one inside, one outside), means that building products manufacturers should expect greater duplication of kitchen fixtures/features within one home.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Outdoor Space Materials
Focus on outdoor materials that are low maintenance and durable.

These are the top priorities of homeowners, by far.

Top material features prioritized by homeowners for outdoor space

Ordered by weighted rank, darker color = higher ranking

<table>
<thead>
<tr>
<th>Feature</th>
<th>31%</th>
<th>27%</th>
<th>16%</th>
<th>6%</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Durable</td>
<td>35%</td>
<td>25%</td>
<td>12%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Sustainable</td>
<td>7%</td>
<td>14%</td>
<td>14%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Stylish</td>
<td>12%</td>
<td>9%</td>
<td>13%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Inexpensive</td>
<td>16%</td>
<td>11%</td>
<td>11%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

The low scores for “inexpensive” suggest that homeowners will pay for quality in their outdoor materials.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Architectural designers favor durability over cost for roofing, envelope, and doors/windows, and hardscaping.

Cost outweighs durability for exterior living areas and landscaping.

Source: 2021 Annual Survey of Architecture conducted by the New Home Trends Institute by John Burns Real Estate Consulting, LLC and Pro Builder.
Pandemic Impact
The pandemic increased the importance of outdoor space.

Two-thirds or more of young homeowners and family homeowners say that the pandemic has made their outdoor spaces more important to them.

Impact of COVID-19 pandemic on importance of outdoor space to homeowners

<table>
<thead>
<tr>
<th></th>
<th>Much more important</th>
<th>More important</th>
<th>Neutral</th>
<th>Less important</th>
<th>Much less important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young Singles and Couples</td>
<td>29%</td>
<td>36%</td>
<td>33%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Young Families</td>
<td>39%</td>
<td>32%</td>
<td>27%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Mature Families</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>1%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Mature Singles and Couples are the least likely to value outdoor spaces more, with an even split between those who do and those who feel neutrally.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
The pandemic triggered a boost in outdoor remodels among young homeowners.

A third of young homeowners (singles, couples, and families) remodeled their outdoor spaces in 2020 or later.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Architectural designers are already responding with increased connection to the outdoors.

Architectural designers surveyed in 2021 say that over the next three years...

**Connection to the outdoors/nature** will be their second largest consideration when designing homes, after cost.

Source: 2021 Annual Survey of Architecture conducted by the New Home Trends Institute by John Burns Real Estate Consulting, LLC and Pro Builder.
Increased work from home, a secondary impact of the pandemic, will also drive greater desire for outdoor space.

Remote work enables workers to utilize outdoor space during the workday, not just after work or on the weekend.

"I'm working from home 100% of the time. Having **outside green space is really important for a break from it.**
- Mature Family in suburban Kentucky"

"I work from home permanently now and having that outdoor space is **critical to mental health.**
- Mature Single or Couple in suburban Pennsylvania"

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Home offices with connection to nature are on the rise.

“At the back of the house, with direct access to the yard/patio” is the second highest ranking home office option (after upstairs) amongst homeowners who worked from home during the pandemic. See our [October 2020 work-from-home report](#) for more.

According to the Dream Finders Homes, ample light sells a house. This rings true in the home office where optimized lighting is one of the highest-ranking features, according to our survey.

While an office might seem like an odd merchandising choice for an active adult community, not all buyers who move into a 55+ community are retired. The positioning of the office space with direct access to the yard allows for calming views and easy access for pets to be let outside.

Read more [here](#).

Meadow Collection, Reverie at Trailmark
Dream Finders Homes
St. Augustine, FL

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC August 2020 survey of 1,242 homeowners with household income of $50k+ who worked from home during the COVID-19 pandemic.
Survey Methodology

In October, we surveyed 1,184 homeowners matching the following characteristics. Responses were weighted nationally by region and life stage group.

Executive Summary
Outdoor Space Importance
Kitchen Connection
Outdoor Space Materials
Pandemic Impact
Appendix

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Increase in importance of outdoor space depends on region; two-thirds of homeowners in California value them more, compared to just under half in the Southeast.

Impact of COVID-19 pandemic on importance of outdoor space to homeowners

- **California**: 66% more important, 34% not more important
- **Texas**: 65% more important, 35% not more important
- **Florida**: 64% more important, 36% not more important
- **Northwest**: 60% more important, 40% not more important
- **Southwest**: 60% more important, 40% not more important
- **Northeast**: 59% more important, 41% not more important
- **Midwest**: 55% more important, 45% not more important
- **Southeast**: 49% more important, 51% not more important

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
85%+ of homeowners are content with a medium-sized yard or larger.

Small backyard owners are most willing to trade interior space for greater outdoor space, though still a small minority (23% would). Those with very small yards likely cannot afford to give up any square footage.

**Share of homeowners who would trade interior space for more outdoor space**

*By current yard size*

<table>
<thead>
<tr>
<th>Yard Size</th>
<th>Share of Homeowners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very small</td>
<td>7%</td>
</tr>
<tr>
<td>Small</td>
<td>23%</td>
</tr>
<tr>
<td>Medium</td>
<td>15%</td>
</tr>
<tr>
<td>Large</td>
<td>14%</td>
</tr>
<tr>
<td>Very large/open space</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Younger homeowners are more willing to trade interior space for outdoor space.

Nearly a quarter of Young Singles and Couples would trade interior space for more outdoor space.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
30% of urban homeowners would trade interior space for more outdoor space.

Urban households are less likely to have easily-accessible options for outdoor living in the surrounding community.

Share of homeowners who would trade interior space for more outdoor space

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Homes within the 3K–4K square foot range would most easily compromise some indoor space for greater outdoor space.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
If interested in trading interior space for outdoor space, homeowners would most prefer to give up a bonus space.

<table>
<thead>
<tr>
<th>What homeowners would trade for more outdoor space</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Removal of bonus room or den/office</td>
<td>31</td>
</tr>
<tr>
<td>One less bedroom than my home currently has</td>
<td>25</td>
</tr>
<tr>
<td>One less garage space than my home currently has</td>
<td>24</td>
</tr>
<tr>
<td>I change my mind. I would not want to trade any of these things.</td>
<td>20</td>
</tr>
<tr>
<td>Removal of formal living room or dining room</td>
<td>14</td>
</tr>
</tbody>
</table>

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Our Annual Survey of Architecture forecasts continued growth in entertainment-centric yards.

Firepits/fireplaces and outdoor kitchens will continue to accelerate, according to architectural designers.

- 73% of architectural designers most often included firepits/fireplaces in their drawings in 2020.
- 68% most often included outdoor kitchens.

### Outdoor features most commonly included in residential projects in 2020

- **Firepits/fireplaces**: 73%
- **Outdoor kitchens**: 68%
- **Gazebos/pergolas**: 44%
- **Pools**: 36%
- **Package delivery solutions**: 22%
- **Spas / hot tubs**: 20%
- **Outdoor shower**: 20%
- **Waterfalls / water features**: 16%
- **Pizza oven**: 10%
- **Sunken pits**: 9%
- **Other**: 9%
- **Golf putting green**: 3%

Source: 2021 Annual Survey of Architecture conducted by the New Home Trends Institute by John Burns Real Estate Consulting, LLC and Pro Builder.
**Young Families** additionally prioritize children’s play spaces in their remodels; **Mature Singles and Couples** are more inclined to prioritize aesthetics.

**Top functions prioritized in homeowners’ outdoor space remodel**
*Ordered by weighted rank, percentages indicate the share that prioritized*

**Young Singles and Couples**
- Lounging/gathering space (52%)
- Private space (neighbors cannot see in) (40%)
- Cooking/dining space (35%)

**Young Families**
- Children’s play space (e.g., lawn, jungle gym) (55%)
- Lounging/gathering space (54%)
- Private space (neighbors cannot see in) (37%)

**Mature Families**
- Lounging/gathering space (64%)
- Cooking/dining space (44%)
- Private space (neighbors cannot see in) (36%)

**Mature Singles and Couples**
- Lounging/gathering space (63%)
- **No specific function, just nice to look at** (36%)
- Private space (neighbors cannot see in) (33%)

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Outdoor kitchens/bars are a rising trend, more prominent in some regions than others.

In Texas and California, over 1 in 10 homeowners now has an outdoor kitchen or bar.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Low maintenance outdoor materials are particularly important to Mature Singles and Couples.

Share of homeowners who consider each outdoor material feature important

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Most homeowners with outdoor space have a large portion of lawn and small-to-moderate amounts of plants and hardscaping.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
Backyard ground covering depends on region.

In California and Southwestern backyards, a majority of homeowners have a moderate-to-large amount of hardscaping, and a similar amount of lawn. Other regions of the country are much more lawn heavy.

Source: New Home Trends Institute by John Burns Real Estate Consulting, LLC October 2021 survey of 1,184 homeowners with homes containing outdoor space.
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