NEW CONSTRUCTION SURVEY 2026

What New Home Buyers Want

Homes.com™

Contents

SECTION 01

At a Glance

Key Findings

Today's new construction buyers approach the purchase with more information and higher expectations than ever, anchoring their decisions in space, affordability, and long-term financial confidence rather than status.

Builders who present their homes with clarity, invest in rich and authentic media, and lead with proof of quality can earn lasting loyalty, as modern purchasers increasingly reward transparency and substance over polish.

More space and financial autonomy are key motivators.

The desire for a larger home or more space tops buyer motivations at 35%, with the next drivers all tied to financial autonomy: financial readiness (32%), finding an affordable area (31%), and the drive to stop renting (31%).

Home offices are a necessity.

64% of respondents work remotely at least one day of the week. Purchasing a new construction home is effectively cutting down travel time. Buyers are prioritizing location efficiency and winning back their time. On average, buyers shaved 8 minutes off their daily commute (a 26% decrease) after moving into their new home.

Ai and video drive the search.

Digital discovery has shifted decisively: **51% of buyers now use Ai tools during their search,** and 62% engage with Ai three or more times a week. Video and immersive tools have become essential for the fast-growing Gen Z segment.

New construction is seen as an opportunity to customize.

Homebuyers expect a high level of control in new construction, with 70% wanting full customization. They view this as a baseline rather than a premium feature. **The ability to start with a blank slate and to tailor the finishes and the layout is a strong driver of new construction's appeal.**

Reputation decides the builder.

Reputation is the most decisive factor in builder selection. When buyers consider a builder they factor quality of materials (57%) and builder experience (54%). They far outweigh financial incentives (30%), and objective reviews beat social media.

Financial decisions are top of mind.

Upfront costs are primary concerns: **homeowners insurance (50%), property taxes (49%), and closing costs (49%).** Roughly 74% of first-time buyers worry about qualifying for a mortgage.

Function is more important than aesthetics.

Buyers are prioritizing practicality over luxury appeal. **Features like private outdoor space, security, and flexible rooms are more important to them than visual upgrades.** The modern home is expected to feel comfortable, safe and personal.

SECTION 02

Who Are New Home Buyers?

Homes.com

Why They Buy New Construction

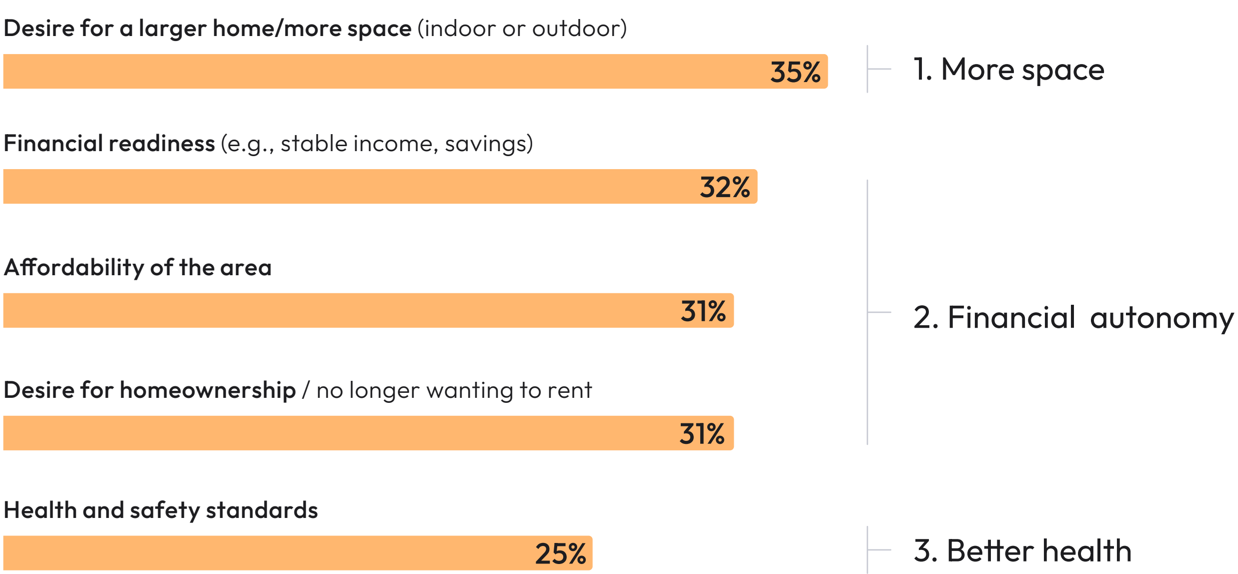
The motivations behind new construction purchases are both emotional and deeply practical.

The 2026 Homes.com New Construction Builder Study reveals that today's buyer is anchoring decisions in **financial independence, personal control, and long-term quality, not just square footage**.

The desire for a larger home or more space tops the list at 35%, but the next three drivers are all tied to financial autonomy: achieving financial readiness (32%), finding an affordable area (31%), and the fundamental desire to stop renting (31%).

Below those, health and safety standards (25%) are an emerging motivator. A quarter of buyers specifically sought new construction for non-toxic materials, better air quality, and updated safety codes.

DECISION DRIVERS FOR NEW CONSTRUCTION BUYERS



Hear Directly from New Home Buyers

A new home as a lifestyle choice

Our consumer views a home as a personalized canvas, driving the demand for full structural and aesthetic customization to a staggering 70%.

When sketching out this ideal life, **buyers are anchoring their daily routines on a spacious four-bedroom, 2.5-plus bathroom blueprint that optimizes light, work, and wellness** — overwhelmingly prioritizing sun-drenched kitchens (85%), abundant kitchen storage (84%), and dedicated home offices (74%) to support hybrid lifestyles.

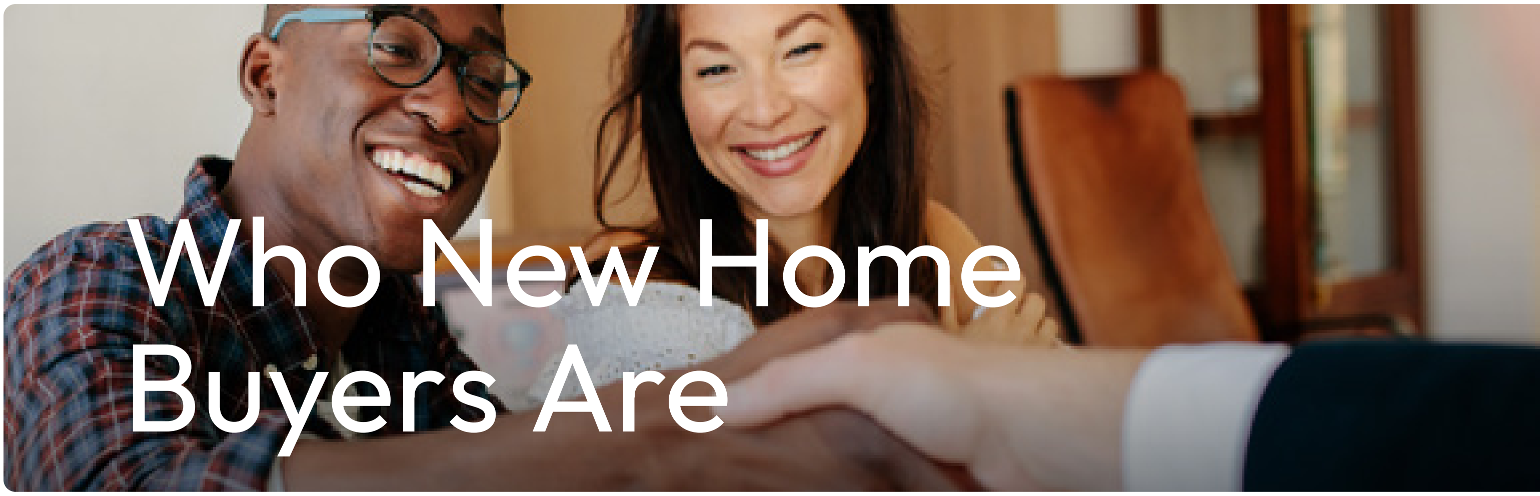
"I want to downsize into a house that's smaller, smaller everything, smaller footprint, smaller size, smaller bills"

"A smooth countertop"

"No old-house problems"

"Fewer repairs"

"Does it have a yard? Well, backyard, not necessarily a front yard, but backyard"



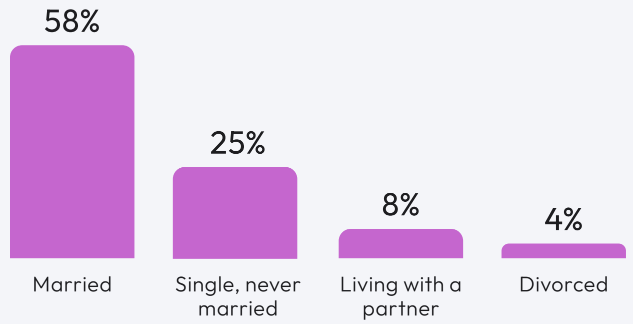
Who New Home Buyers Are

Marital Status

One quarter of the new construction market is made up of single, never-married individuals.

25%
of all new construction buyers are single/unmarried.

NEW HOME BUYERS BY MARITAL STATUS

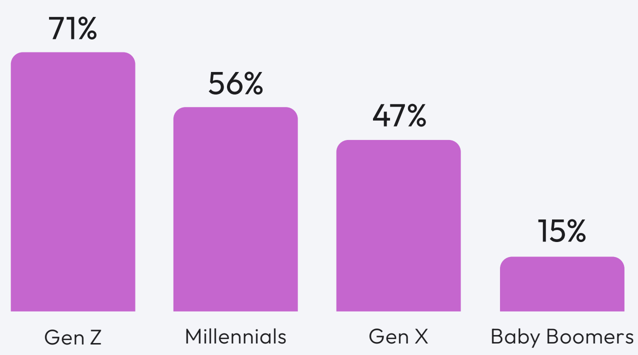


First-Time Buyers

More than half of all new construction buyers are first-time homeowners. Nearly three-quarters of Gen Z looking at new construction are first-time buyers.

55%
of new construction buyers are first-time homeowners.

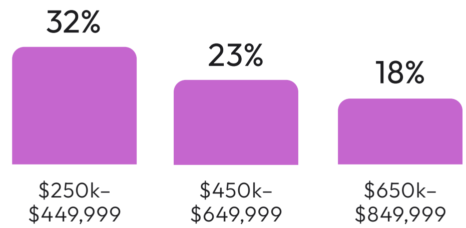
PERCENTAGE OF FIRST-TIME BUYERS BY GENERATION



Budget Ranges and Home-Size Targets

Budget

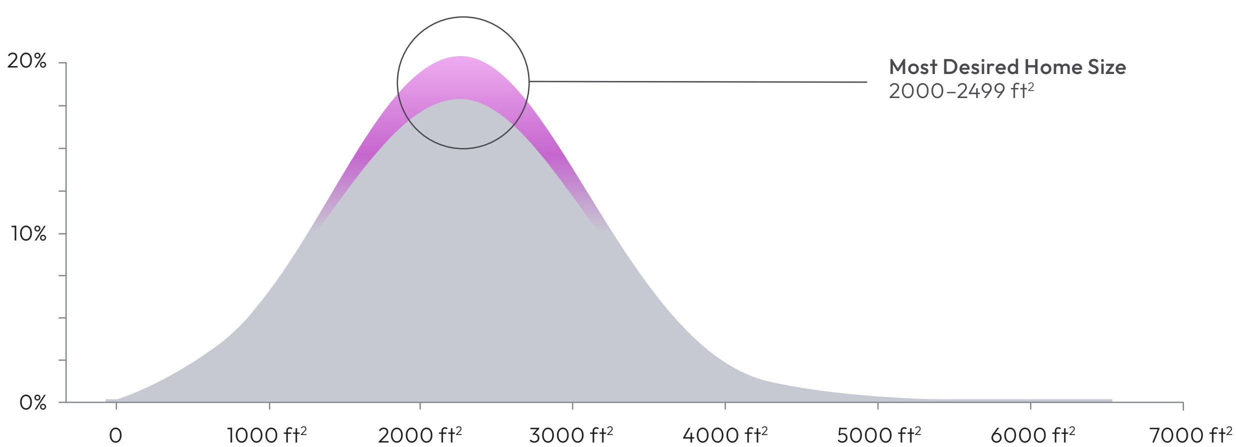
Buyer volume decreases steadily as price points rise, with the largest share of buyers clustering in the entry-level and mid-tier ranges. Only 13% of buyers are shopping above $1 million.



Home Size

The sweet spot for floor plans is a **four-bedroom, 2.5-plus-bath configuration, with the bell curve of desired square footage peaking in the 2,000 to 2,499 square feet range**. Demand drops sharply at the extremes. Only 1% are seeking homes under 1,000 square feet, and just 5% want 5,000 square feet or more. An overwhelming majority of buyers in every state are looking for a single-family home.

IDEAL SQUARE FOOTAGE FOR THE UNDER-650K BUYER



Buyer Expectations Across Markets

Nationally, buyer priorities vary meaningfully by price point, with each segment seeking a different balance of functionality, flexibility, and luxury. Understanding these evolving expectations helps clarify what features resonate most with buyers at every level of the market.

The Attainable Market

These buyers want maximum utility in an optimized footprint.

A home office, **timeless kitchen finishes, and high-quality foundational materials** matter more than luxury add-ons. These buyers respond to builders who lead with reliability and clear warranties.

The Move-Up Market

This buyer is upgrading for qualitative improvements to daily life.

Flex spaces that evolve with the family, quality cabinetry, and adaptable layouts matter most. Formal dining rooms are out; hobby rooms and playrooms are in.

The Discerning Buyer

A dramatically different buyer.

Dual home offices are expected by 65%. **Wellness rooms** and **infrared saunas** are sought by 67%. Showpiece kitchens with pot fillers (71%), waterfall countertops (66%), and farmhouse sinks (66%) are standard expectations. Secure home package rooms are demanded by 75% of this segment. Floor plans of 5,000 square feet or more are expected by 39%.

SECTION 03

How Are They Searching?

New Home Buyers Embrace Virtual Search Tools

Videos of new homes and their communities, interactive floorplans, and interactive site plans give buyers an immersive way to explore properties, understand how spaces come together, and envision what it might be like to live in a home and community. These tools can help buyers better evaluate their options and decide which homes and communities they want to explore further.

Boosted builders on Homes.com receive a 60–90 second community video, three Matterport tours, and an interactive community map, giving home shoppers more engaging ways to experience their homes and communities online.

MOST POPULAR VIRTUAL SEARCH TOOLS

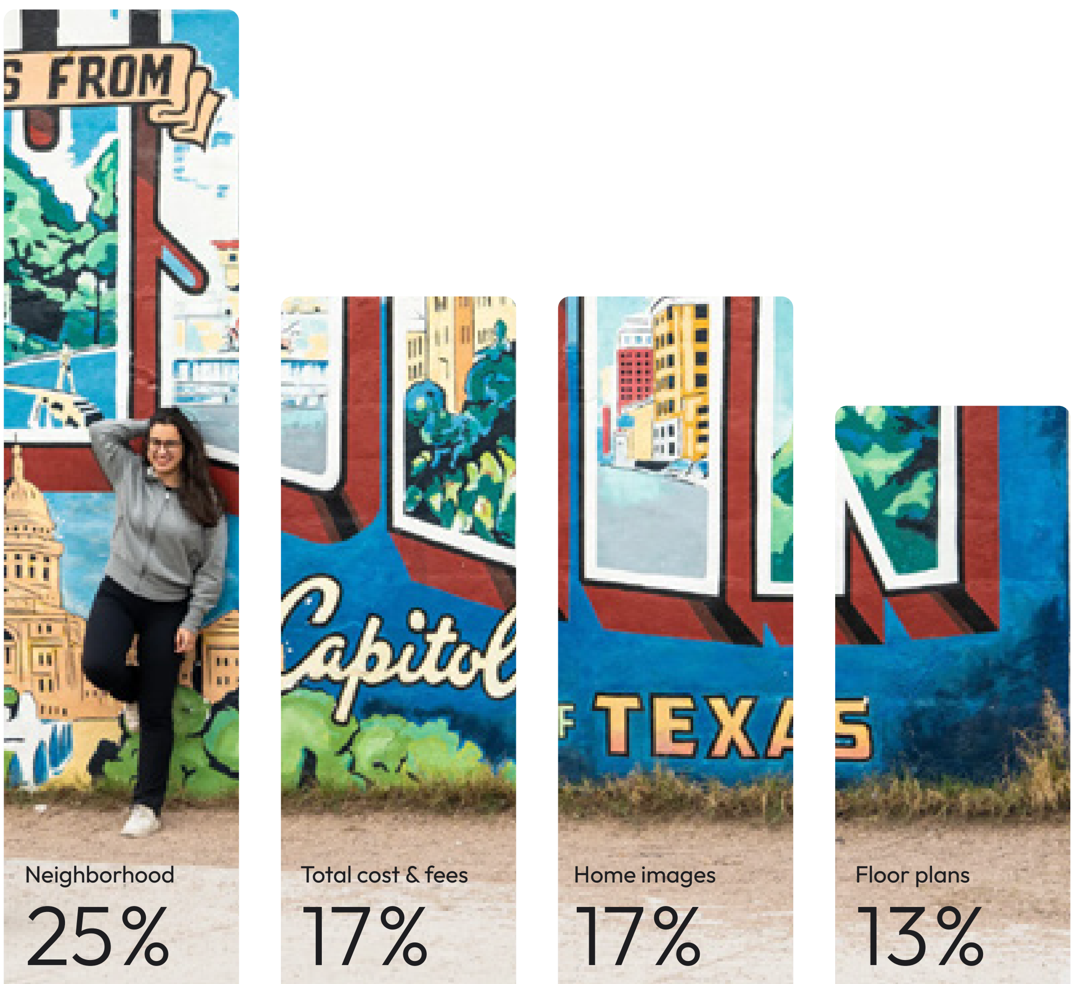
Searches Start With Neighborhoods

Consumers are anchoring their search in **place**, **price**, and **home visuals**.

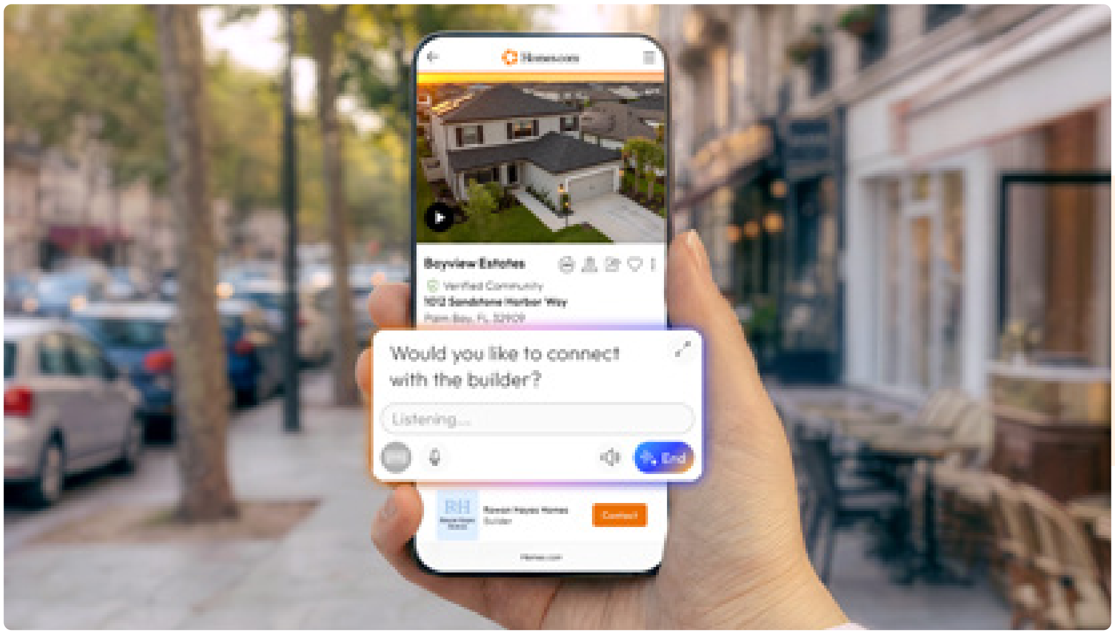
Neighborhoods First

The 2026 buyer is doing more research, using more platforms, and arriving at the sales conversation better informed than ever. When filtering homes online, 25% look at the neighborhood first, 17% prioritize total costs and fees, and 17% go straight to home images. Floor plans (14%) come after. This sequence tells a clear story: Buyers are vetting the context before they fall in love with the product.

MOST POPULAR HOME SEARCH FILTERS



Most Buyers Use Ai Tools

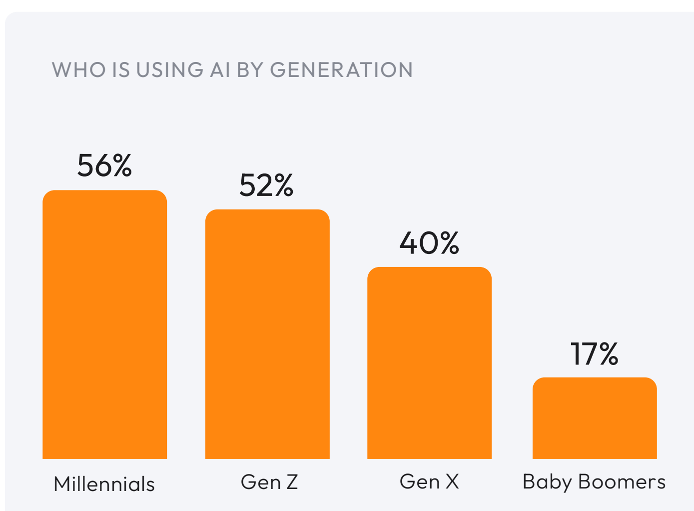


Learn more about Homes Ai on our [YouTube channel.]

More than
50%
of homebuyers are using Ai tools like [Homes Ai].

More Than Half of Buyers Have Pivoted to Ai

Ai has become a standard part of that research process. A majority of buyers (51%) used Ai tools during their home search, and 62% engage with Ai three or more times a week. Among Gen Z, the fastest-growing buyer segment, 52% are leveraging Ai tools to research, compare, and shortlist communities. Builders whose listings carry complete, accurate, and detailed information are the ones that surface in Ai-assisted searches. Those with thin data don't make the shortlist.

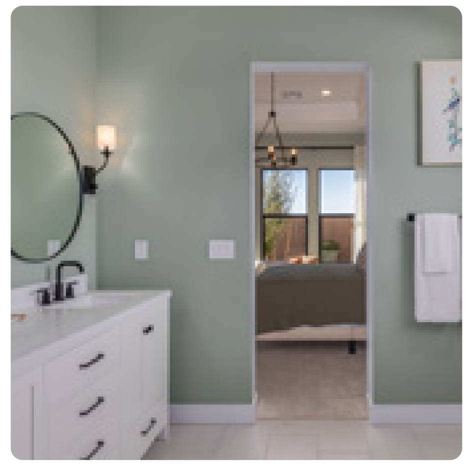


Younger buyers are using Ai more and more in their new home searches.

SECTION 04

What Do New Home Buyers Want?

They Want Specific Interior Space



The home office is the most critical additional room in the house.

Seventy-four percent of buyers say a home office is important, making it the single highest-priority additional feature in the study. Forty-nine percent of buyers overall and 65% of ultra-luxury buyers (over $2M) demand a second home office. Among Gen Z buyers, 63% consider a dedicated playroom important, compared to just 14% of boomers.

74%

of buyers want **a home office**, making it the single highest-priority additional feature in the study.

The kitchen: function over trends.

Buyers overwhelmingly prioritize foundational kitchen quality. Natural light (85%), quality cabinetry (84%), and extra kitchen storage (84%) lead by a wide margin. Highly stylized aesthetic choices rank at the bottom: waterfall countertops (50%), dark cabinets (50%), and white cabinets (45%). The key generational exceptions are worth noting for builders targeting specific segments: 56% of baby boomers consider waterfall countertops important, compared to 13% of Gen Z. Dark cabinets are heavily preferred by younger buyers, with 52% of Gen Z prioritizing them vs. 17% of boomers. At the luxury tier, 60% of the over-$2M buyers prioritize white cabinets.

The bathroom is non-negotiable.

Ninety-one percent of buyers require a mix of bathtubs and showers. 62% specifically want a freestanding bathtub with a separate walk-in shower. Properties offering only one or the other are effectively alienating the vast majority of the market. The primary bathroom has evolved into a personal sanctuary, and the standalone tub/walk-in shower combination is a proven closer.

Buyers want homes that work, not necessarily ones that impress.

Buyer volume decreases steadily as price points rise, with the largest share of buyers clustering in the entry-level and mid-tier range. Only 13% of buyers are shopping above $1 million.

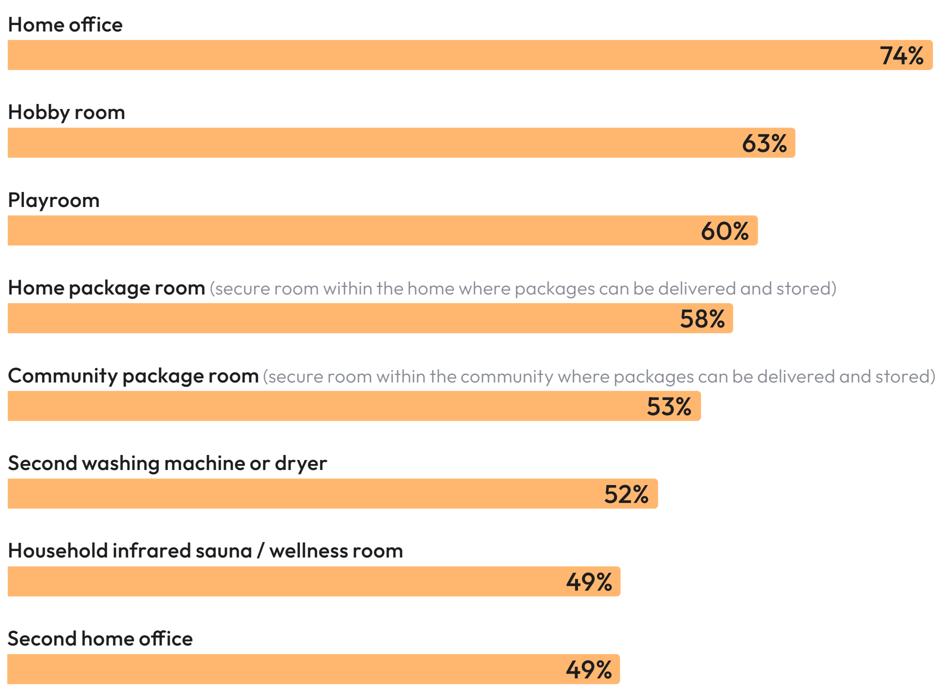
Multigenerational living is surging.

Eighteen percent of buyers overall are motivated by the need for multigenerational living space. Flexible layouts that can accommodate aging parents or returning college students are a meaningful differentiator for younger buyer segments.

Energy efficiency is a baseline expectation.

Health and safety standards prompted 25% of buyers to choose new construction over resale specifically, citing non-toxic materials, better air quality, and adherence to updated safety codes. Energy efficiency is no longer a premium selling point; it is a baseline expectation, especially among younger buyers who view long-term utility savings as part of the financial calculus of homeownership.

INTERIOR FEATURES BUYERS WANT



62%

of buyers specifically want a **freestanding bathtub** with a separate walk-in shower.

SECTION 05

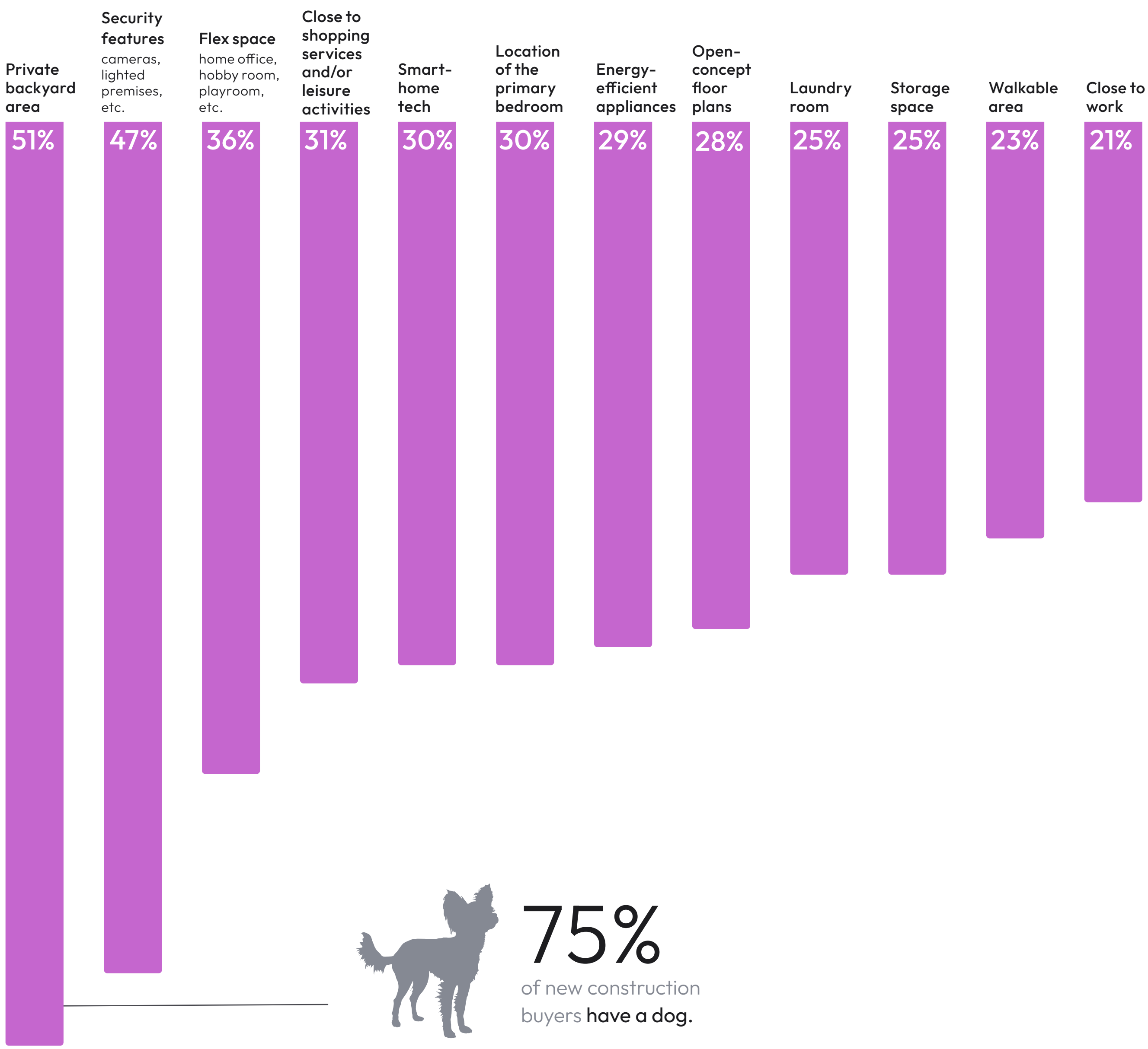
Where Do Buyer Preferences Split?

Homes.com

New Home Features Ranked

These are the home features considered most and least important when choosing new construction.

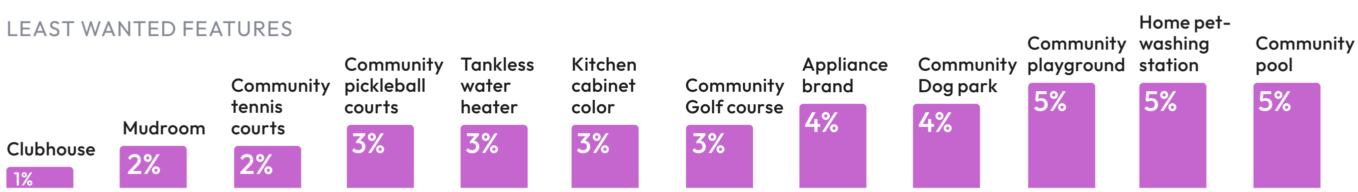
MOST WANTED FEATURES



75%

of new construction buyers have a dog.

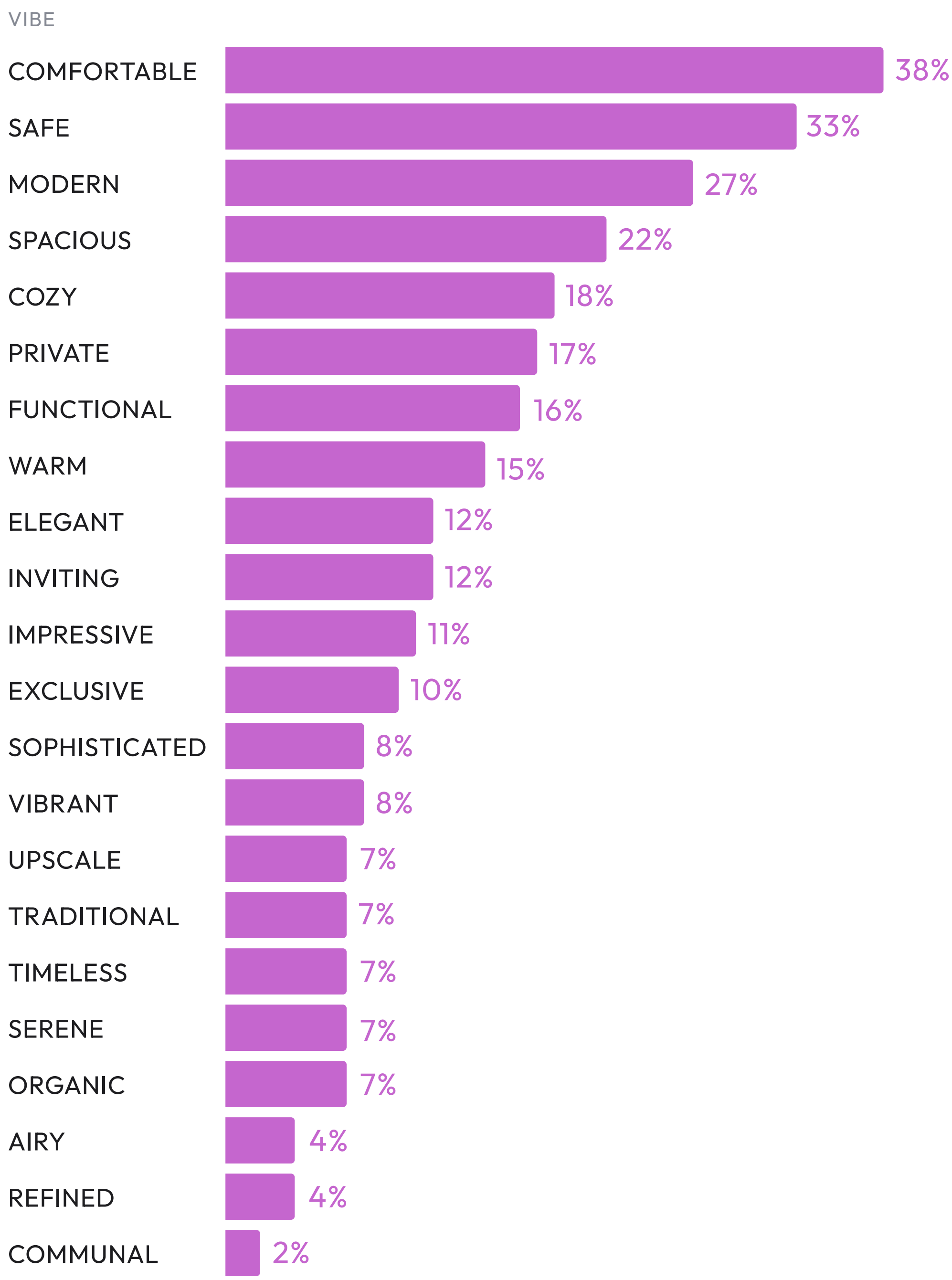
LEAST WANTED FEATURES



The Most Sought After Vibes in America

Beyond square footage and price, the survey asked buyers how they want a home to feel when they walk through the door, the emotional qualities that drive a purchase but rarely show up in a listing.

Buyers consistently chose comfort, security, and everyday livability over status or impressiveness — a cue builders should carry into how they stage model homes and write listing copy. Because these preferences shift by market, see our state by state analysis to find which vibes resonate most with buyers in your region.



The Arizona Buyer

Arizona's new construction buyers are more likely to be experienced homebuyers than the average: 57% are repeat homebuyers, as opposed to 45% in the rest of the country. **Financial readiness and financial incentives are the top reasons to buy in Arizona.**

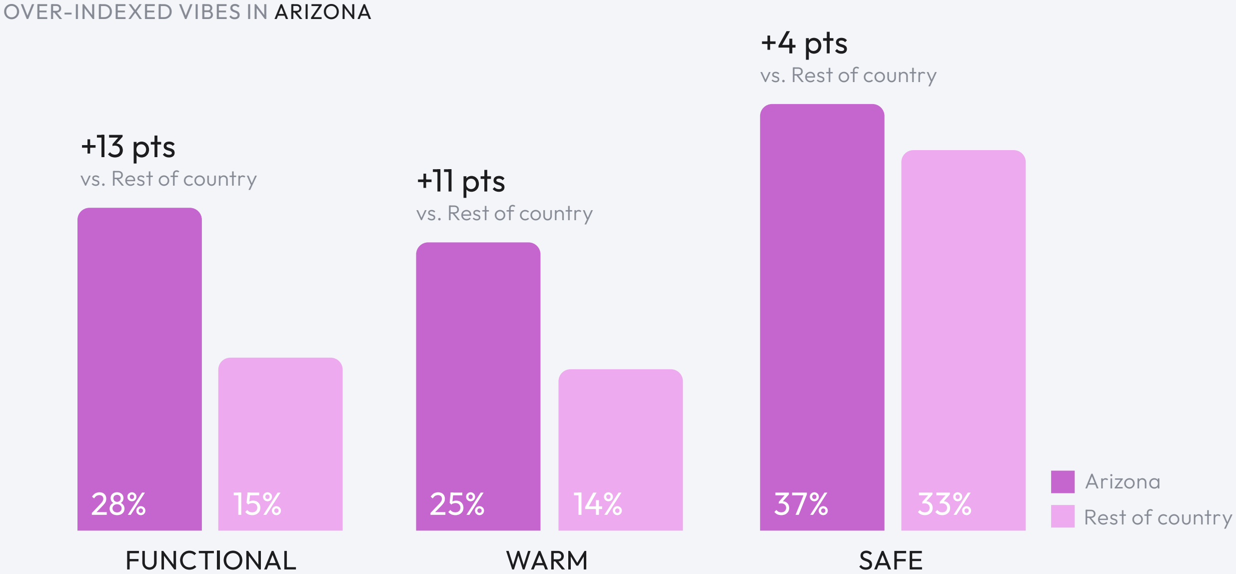
Check out the backyards at Boulder Canyon in Marana, AZ.

A private backyard is highly important to new construction buyers in Arizona, with 61% prioritizing it. Many additional spaces such as playrooms, a second washer/dryer, and wellness rooms are significantly less important to Arizona buyers.

57%

are repeat new home buyers compared to 45% in the rest of the country.

OVER-INDEXED VIBES IN **ARIZONA**



The California Buyer

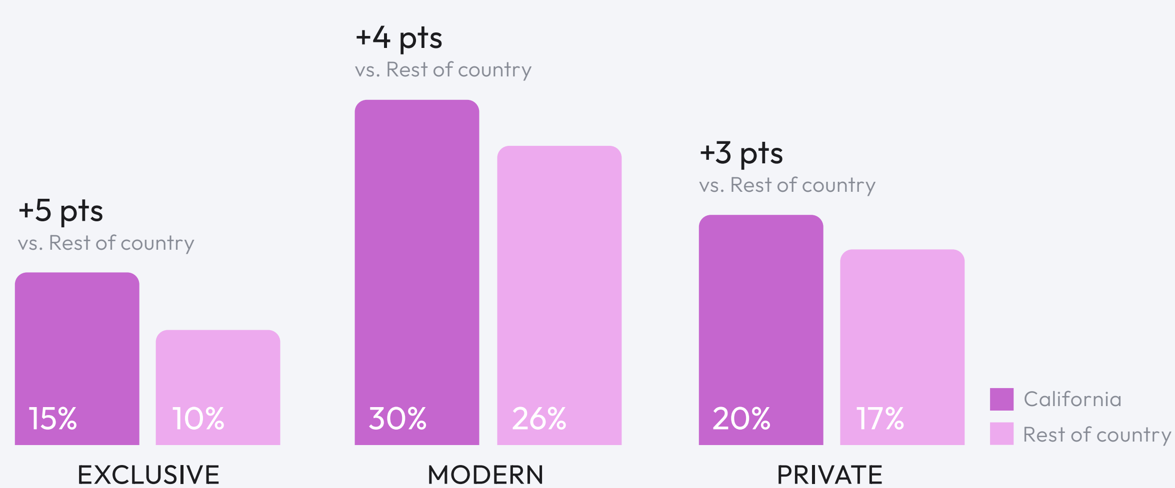
California new construction buyers are experienced homeowners who value aesthetics. Repeat new home buyers make up a slight majority (52%) of California's new construction market, outpacing the rest of the country.

Check out Arroyo Ridge in the Highland Park Neighborhood of Los Angeles.

44%

of California homebuyers are **concerned about additional property taxes**, beyond their standard levy.

OVER-INDEXED VIBES IN **CALIFORNIA**



The Florida Buyer

Due to the hurricane safety standard, more than a quarter of Florida new home buyers have concerns with securing a mortgage. Not surprisingly, the **elevated health and safety standards are among the top reasons these buyers are leaning toward new construction.**

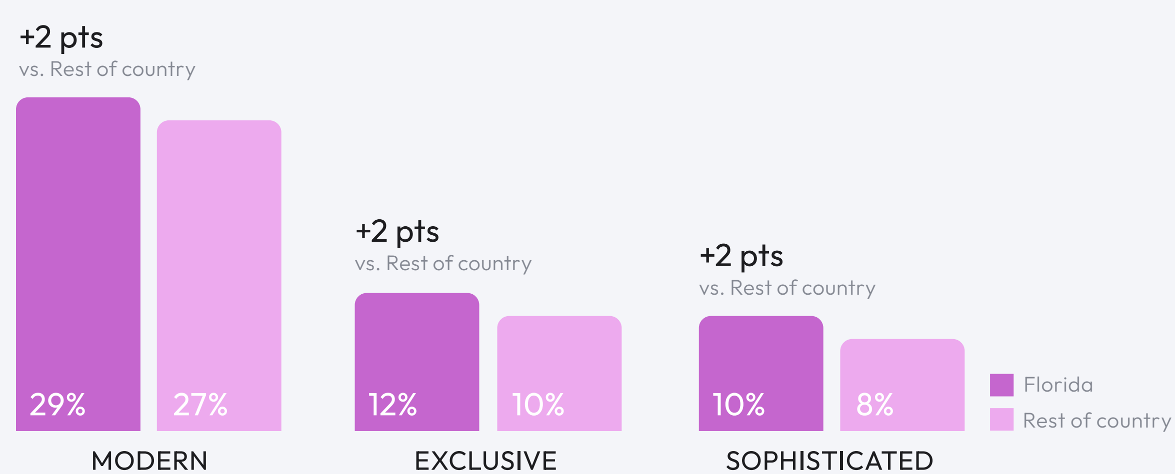
Discover the charm and flexible home design of [Woodland Preserve](#).

27%

of new home buyers in Florida are worried about securing a mortgage due to hurricane safety standard.

Florida buyers also over-index in using Ai to assist them in their home search, with 68% saying they use Ai more than three times a week.

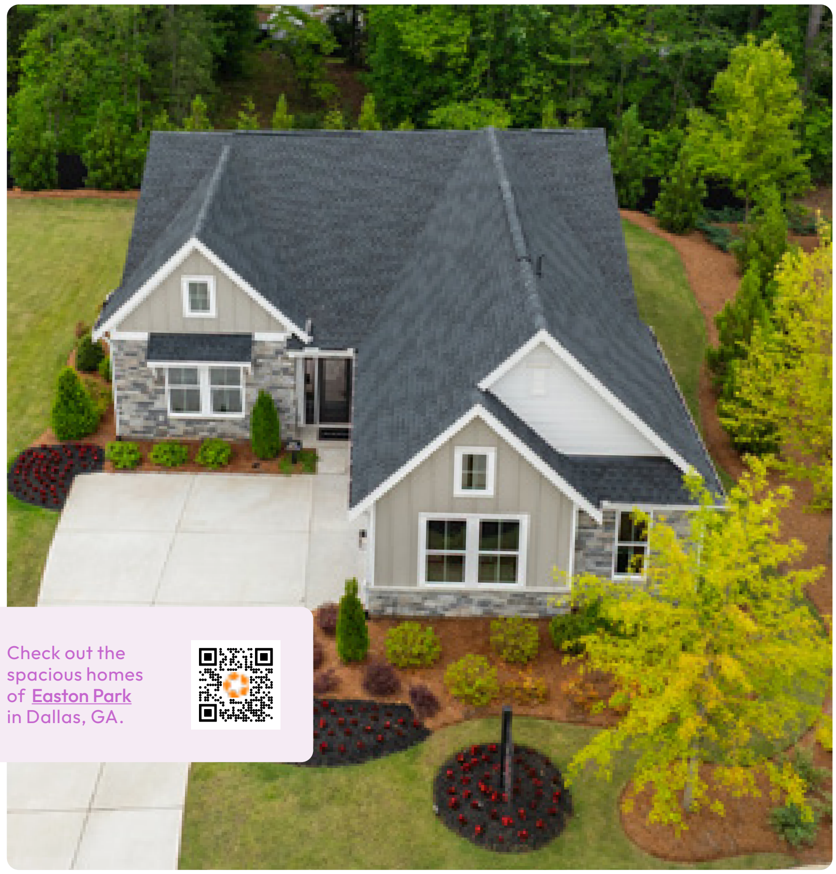
OVER-INDEXED VIBES IN **FLORIDA**



The Georgia Buyer

For Georgia new construction homebuyers, space and cost are primary concerns. Twenty-eight percent of these buyers want their home to feel spacious, with 44% of buyers looking for homes of more than 3,000 square feet.

Additionally, when it comes to the cost associated with buying new construction, these buyers are most concerned with homeowners insurance and closing costs.

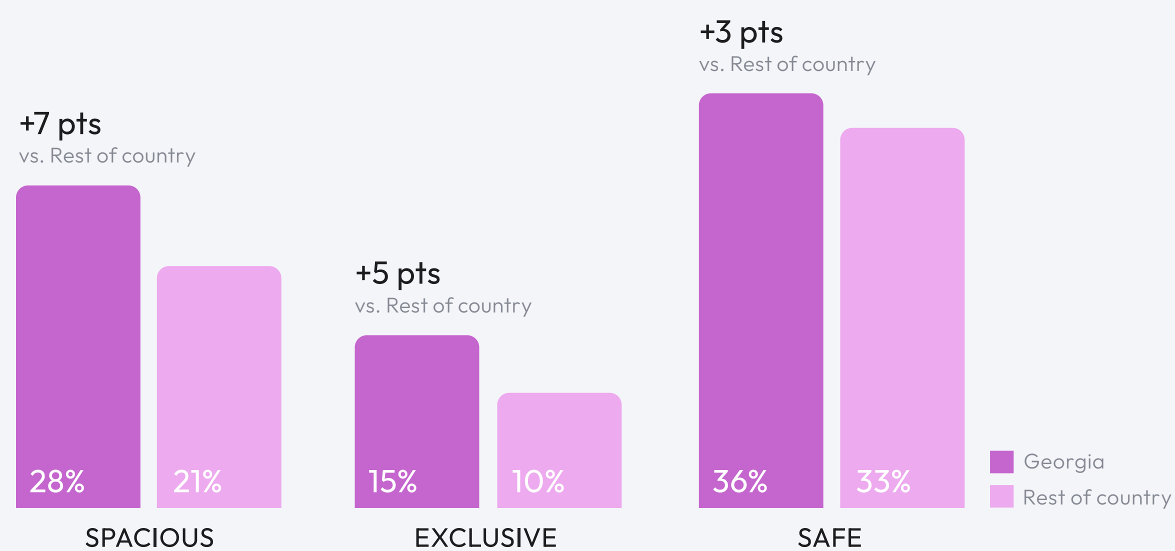


Check out the spacious homes of Easton Park in Dallas, GA.

44%

of Georgia buyers are looking for homes of more than 3000 square feet.

OVER-INDEXED VIBES IN GEORGIA



The New York Buyer

New York new construction buyers over-index on being first-time buyers. And what's driving this interest in new construction? The need for homes with a better health and safety standard.

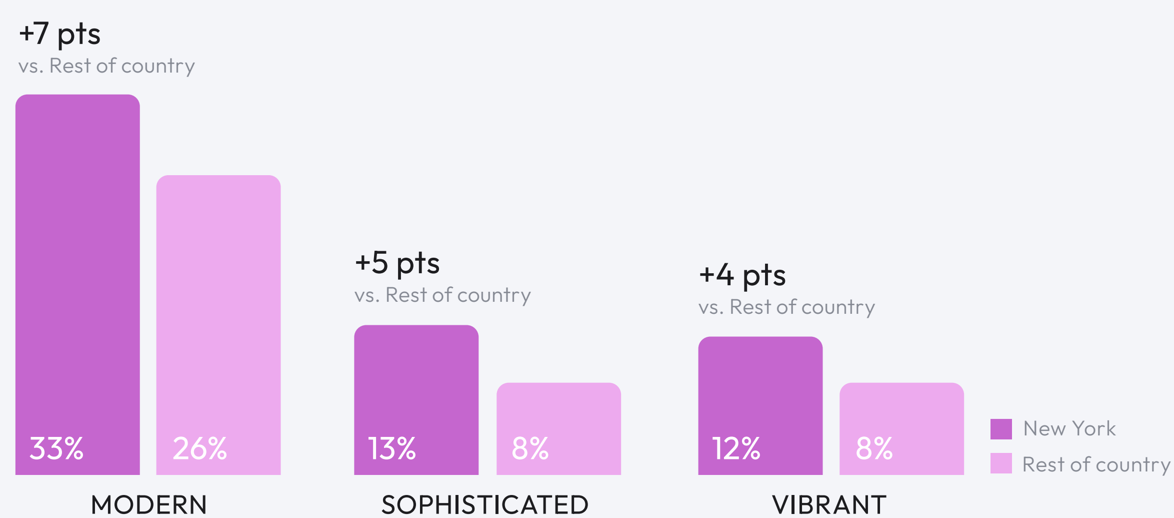
These buyers are heavily invested in the digital search experience — using both social media and Ai to expand their search beyond the typical platforms.

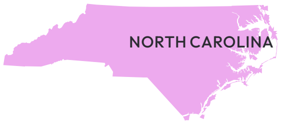
Scroll through Stone Ridge Estates, an Active Adult Community in NY.

33%

of New York buyers want homes that feel modern.

OVER-INDEXED VIBES IN NEW YORK





The North Carolina Buyer

Nearly two-thirds of the North Carolina new home purchasers are first-time homebuyers. Their biggest driver toward this decision is the desire to move away from renting and to own their own home.

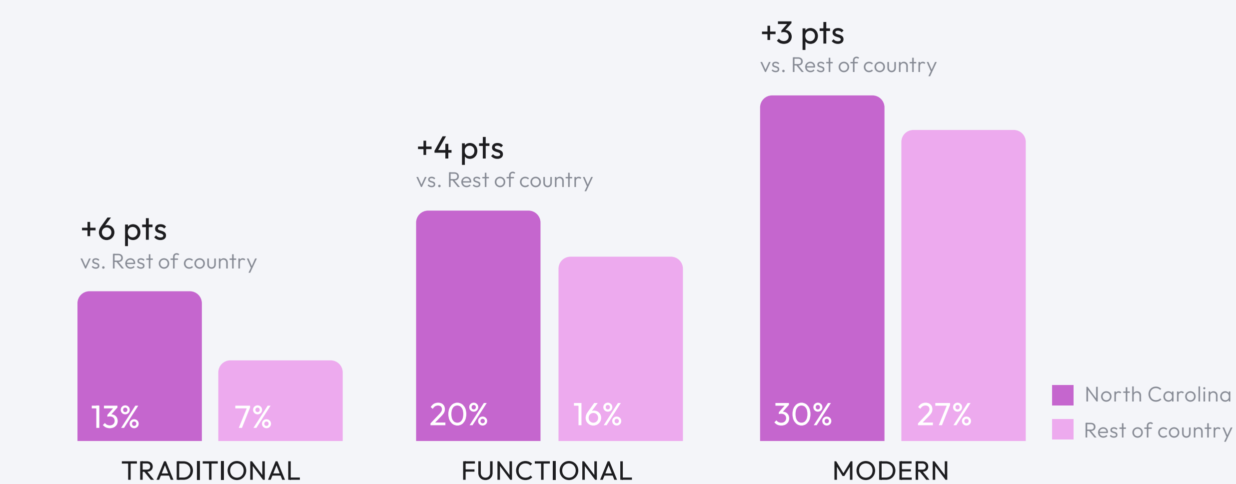
Also, unique to the North Carolina buyer is the focus on homeowners association (HOA) fees, and it's not just a consideration; it affects their search criteria. Twenty-five percent of these buyers filtered their home search budget to include total costs, HOA dues, taxes, and fees.

Experience the tranquility of Sauls Landing.

25%

of North Carolina home searches **filtered by total cost,** including HOA dues, taxes, and fees.

OVER-INDEXED VIBES IN **NORTH CAROLINA**

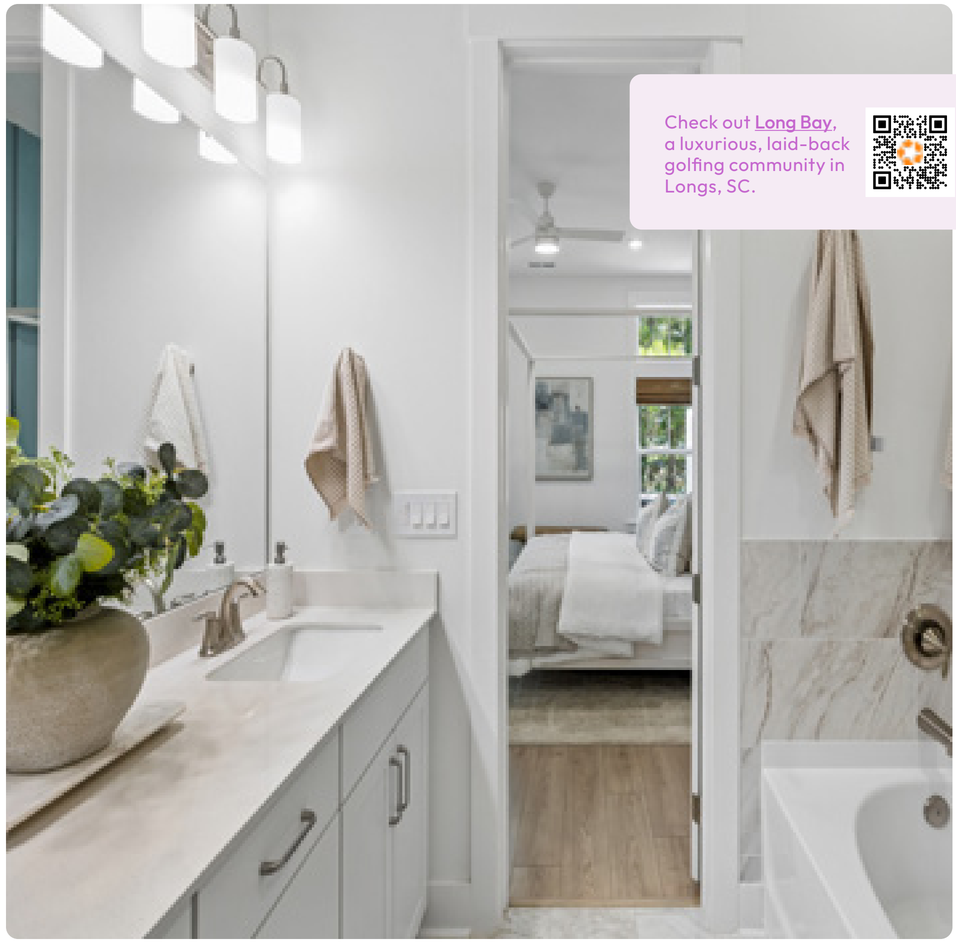


The South Carolina Buyer

Outdoor space is critical to the South Carolina new home buyer, with 65% looking for a private backyard.

Additionally, 37% are prioritizing walkability in their home search.

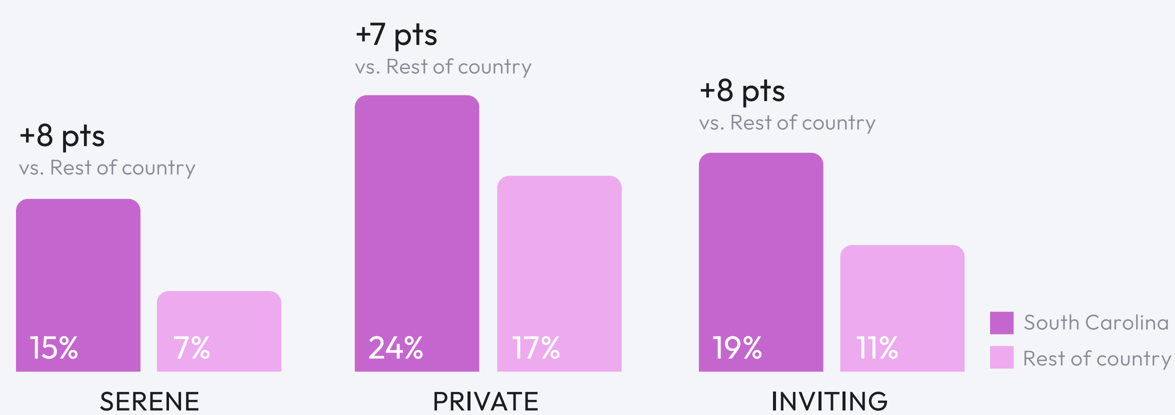
Like many of the southern states, these buyers are concerned about the prices of homeowners insurance, over-indexing the mean by 15%.

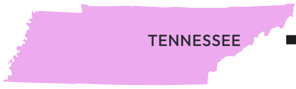


Check out Long Bay, a luxurious, laid-back golfing community in Longs, SC.

Just 15 minutes from North Myrtle Beach, this new community offers a mix of comfort, convenience, and golf-side living.

OVER-INDEXED VIBES IN SOUTH CAROLINA





The Tennessee Buyer

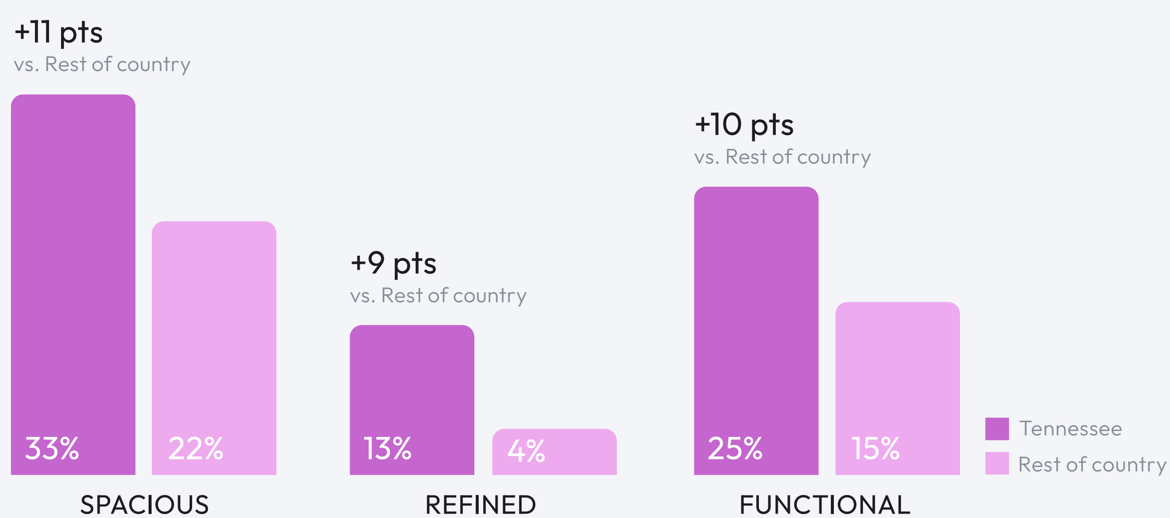
The need for more space is what's driving the Tennessee new home buyer. While "comfortable" was the most common descriptor used nationwide to define what buyers are looking for in a new home, "spacious" ranked highest in Tennessee.

Additionally, a private backyard and a deck ranked first and second in features these buyers are looking for, highlighting their commitment to private spaces.

An exciting new community nestled in the heart of Gallatin, Tennessee

Discover the thoughtfully crafted single homes of [Woods Crossing](#).

OVER-INDEXED VIBES IN **TENNESSEE**

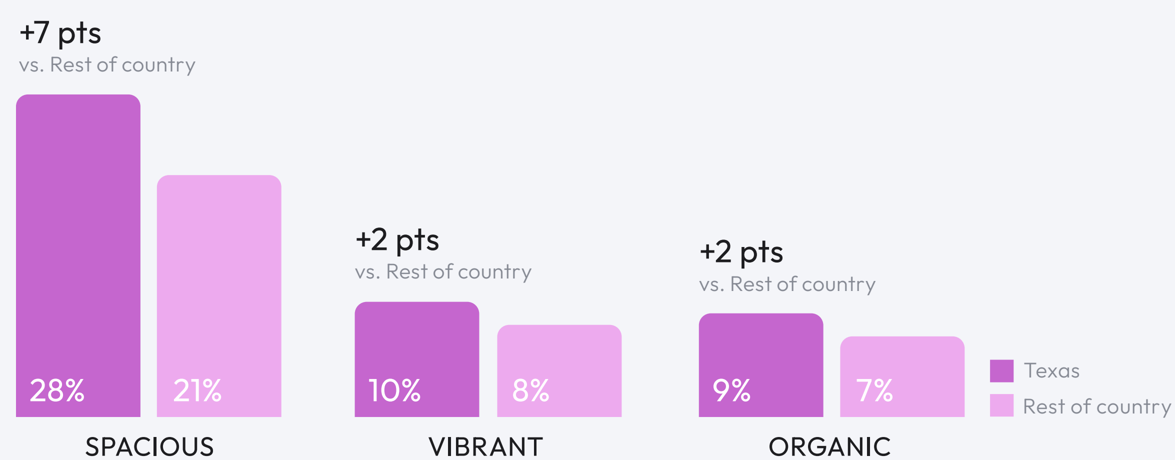


The Texas Buyer

Picture yourself at Copia Pines in Montgomery, TX.

The Texas new home buyer is split nearly 50/50 between first-time homebuyers and repeat homeowners. As with many Southern states, the appeal is more spacious homes. In fact, despite 38% of budgets being between $250 – $499K, 41% of these buyers are looking for homes of more than 3,000 square feet.

OVER-INDEXED VIBES IN TEXAS



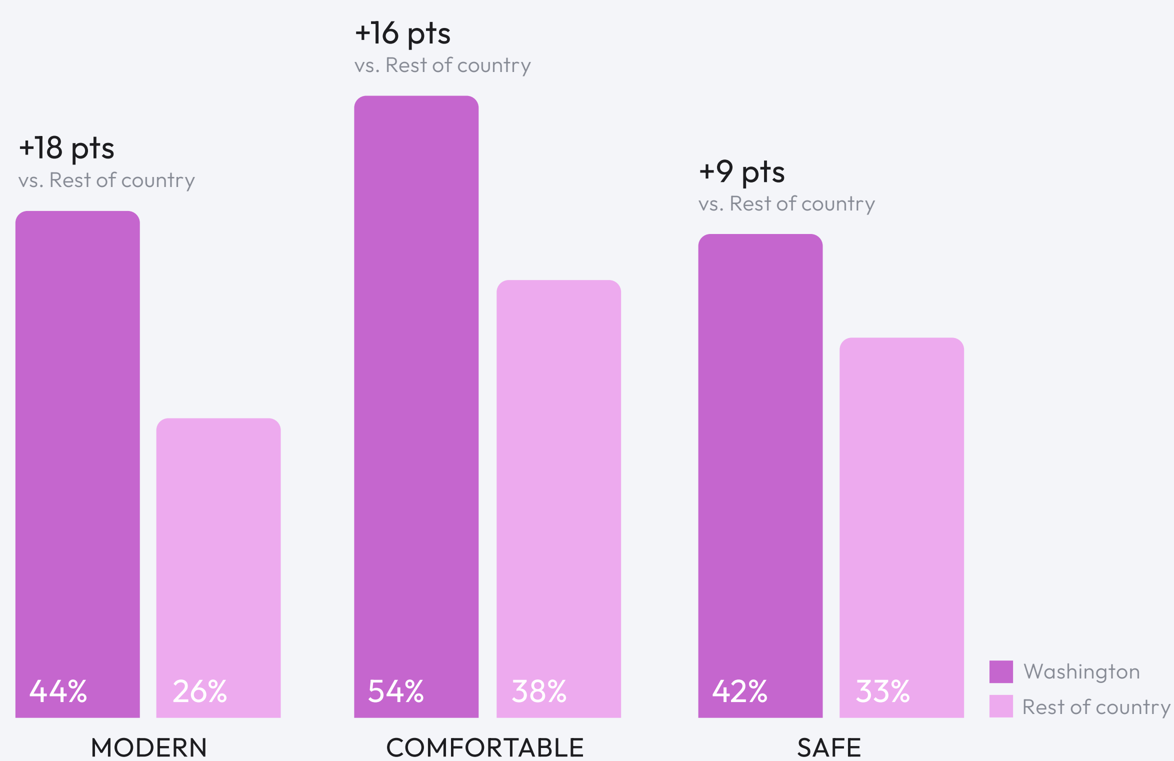
The Washington Buyer

The Washington new home buyer can be considered one of the most tech-forward shoppers in the market. Not only do they over-index on their interest in both smart-home technology and eco-friendly building materials, but their search journey differs as well.

These buyers are utilizing both Ai and builder social media during their search, suggesting a greater emphasis on digital-first marketing is paramount.

Explore the [Paradise Pointe](#) community in Ridgefield, WA.

OVER-INDEXED VIBES IN **WASHINGTON**



SECTION 06

Marketing New Home Communities

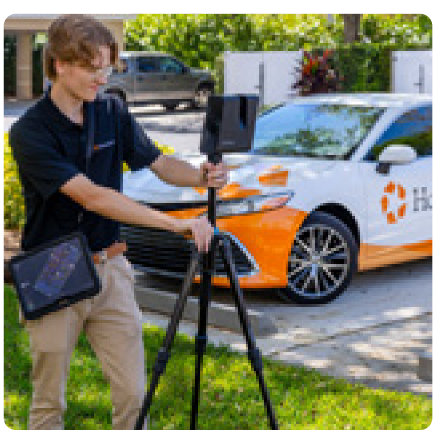
Homes.com

The Marketing Punch List: Optimized with Real Buyer Insights

The new data is in. Here are some key ways you can use it to improve your Marketing strategy and to target today's new construction homebuyer.

1. Provide Detailed Info to Optimize for Ai Searches

51% of buyers are using Ai to search, and 62% are doing so three or more times a week. This is new enough that most builders aren't accounting for it yet. The strategic implication is specific: Listing completeness, accurate data, and detailed community information now determine whether you surface in Ai-assisted searches like Homes Ai at all. Builders with thin or inconsistent listing data are being filtered out by Ai searches before a buyer ever sees them.

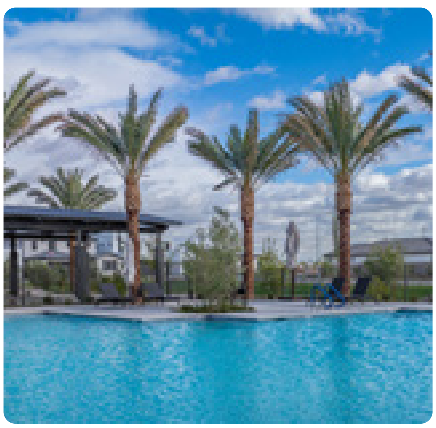


2. Utilize Matterport 3D Tours to Help Buyers Visualize the Space

1 in 4 Gen Z buyers struggles to visualize a completed home. With 71% of Gen Z buyers being first-time purchasers, this is the largest and fastest-growing segment in the market. A Homes.com Community Boost media package includes three Matterport 3D Tours so builders can increase their digital curb appeal and remove a documented barrier to purchase for their primary growth audience.

3. Prioritize the Home Over Amenities

Clubhouses (1%), pickleball courts (3%), and community pools (5%) are at the absolute bottom of buyer priority lists. If a builder's current marketing leads with community amenities, the 2026 data suggests a reallocation toward private backyard, security features, flex space, and kitchen quality, which is where buyers are actually making decisions.



4. Market Your Communities Based on Local Needs

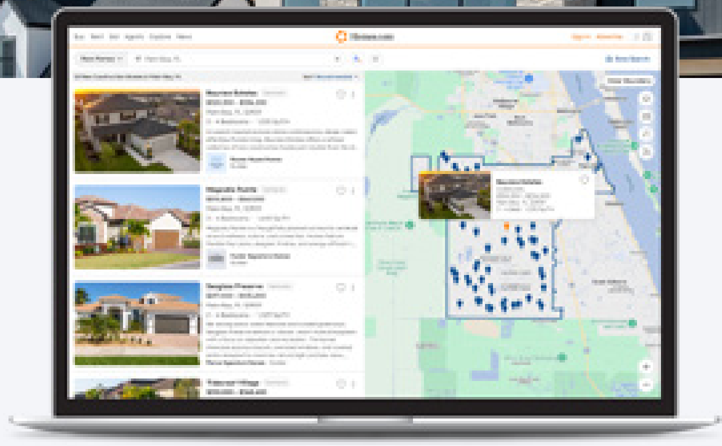
The data now provides enough resolution to justify genuinely different campaigns by market rather than just regional tone adjustments. Florida needs insurance reassurance messaging. California needs outdoor space and privacy emphasis. New York needs HOA and closing cost transparency. A builder who operates across multiple states that runs a single national message is diminishing their chance of the greater returns that customized messaging offers.

5. Focus on Shorter Commutes From New Home Communities

Buyers saved an average of eight minutes off their daily commute by choosing new construction, a 26% reduction. In addition to the quality-of-life benefit, fuel savings are top of mind for buyers in markets with high gas prices, especially New York and California.

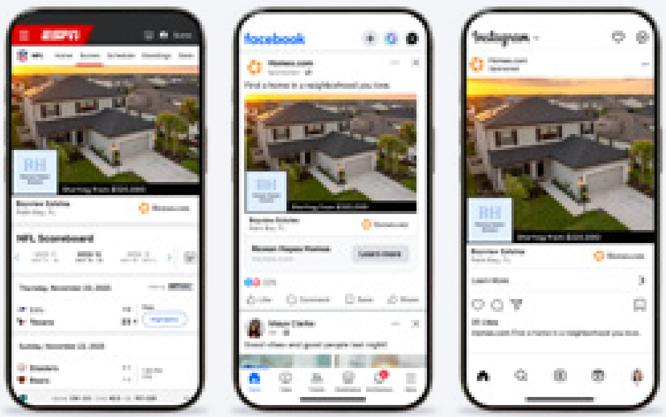
Homes.com™

Reach More New Home Buyers with a Community Boost



Sort Higher, Increase Your Visibility

Boosted community listings sort above all other communities in your market. Move-in ready homes or plans will also sort higher than existing and new homes, giving your listings significantly more exposure.



Custom, Ai-Powered Retargeting Ads Follow Buyers Across the Web

After visiting your Homes.com listings, home buyers will see engaging, professionally produced video display ads that highlight your community—delivered across thousands of popular websites, including Facebook and Instagram.

Media Package

Community Boost media package delivers turnkey media and premium exposure — no coordination, no edits, just polished results. The package includes high quality images, Matterport 3D Tours and a community video optimized for display ads.

Save Time with Pre-Screened Leads!

Our lead vetting team reaches out to buyer inquiries to learn more about their timeline, budget and goals.

Methodology

Purpose and Scope

The Homes.com New Construction Market Landscape Study was designed to explore the evolving preferences, motivations, and challenges individuals face when buying newly constructed homes. The research profiles both recent purchasers and prospective buyers of new construction homes in the U.S. to understand what drives decision-making, floorplan needs, and digital tool usage in this segment of the housing market.

Survey Administration

The research was conducted via Good Run Research and CMI Research. The online quantitative survey had an average completion time of approximately 13 minutes. The survey utilized advanced research designs, including Maximum Difference Scaling (MaxDiff), to accurately identify the hierarchy of buyer-valued features and amenities.

Participant Criteria and Sampling

Respondents meet the following eligibility criteria:

- Must be at least 25 years old.
- Must be the primary or joint decision-maker for major housing-related decisions in their household.
- The home purchase price or budget had to be $250,000 or higher.
- Had to have purchased a newly constructed home in the past 24 months, or who intend to purchase one within the next 24 months.

Total sample size was 3,036 completes and was completed between May 13th 2026 and May 17th, 2026. The sample is broken down into two primary subgroups, 34% recent purchasers (“owners”) and 66% prospective buyers (“intenders”).

Demographic Composition

The sample was demographically balanced to ensure representation across the United States. Recruitment was balanced to reflect the Census mix across the Northeast, Midwest, South, and West regions. The study captures diverse insights across all major housing budgets, varying employment setups (such as fully remote vs. fully in-office), and generational cohorts, including Gen Z, Millennials, Gen X, and Baby Boomers.

Analytical Approach and Statistical Reliability

All statistical testing within the survey was conducted at a 95% confidence level.

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