



PCR<sup>®</sup>

2026

Survey of Homebuyers & Renters  
Researching Lifestyle Communities



# INTRODUCTION

Each year, Private Communities Registry (PCR) surveys highly engaged homebuyers and renters actively researching master-planned lifestyle communities across the United States. *The 2026 Survey of Homebuyers and Renters Researching Lifestyle Communities* captures insights from nearly 1,000 respondents, offering a clear view into how today's buyers are thinking, planning, and searching for their next home.

With more than 10 years of annual survey report insights, this year's results reflect a notable shift in the market. Following the post-pandemic surge in relocation and urgency seen in 2022 and 2023, buyer behavior has steadily evolved into a more measured and intentional approach. The 2026 data highlights a consumer who remains financially strong and lifestyle-driven—but increasingly cautious and deliberate.

While core motivations—such as retirement, warm weather, and wellness-focused living—have remained consistent, the path to purchase has changed. Buyers are taking more time, weighing more options, and leveraging new tools, including AI, as part of their research process.

With 30 years of experience and a highly targeted audience of motivated consumers, PCR delivers insights grounded in real buyer behavior. For builders, developers, and community marketers, this report provides both a snapshot of today's market and a forward-looking guide to where it's headed.

## OVERVIEW

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# Purchase/Rent

The Purchase/Rent data reflects a clear evolution from the urgency-driven market of the early 2020s to today's more deliberate buyer. While demand for lifestyle communities remains strong, buyers are taking a longer-term view—carefully evaluating timing, pricing, and overall value before making a move.

### Uncertainty is at a 5-Year High, But Demand Stays Strong

**55% prefer buying to renting**, yet nearly **38% are “not sure”**—the highest level of indecision recorded, signaling a more cautious buyer mindset.

### Affluent, Cash-Ready Buyers Continue to Dominate

**62% of buyers plan to pay cash**, continuing a steady rise from 53% five years ago and reinforcing the presence of equity-rich, lifestyle-driven purchasers.

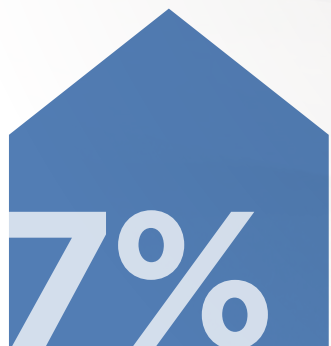
### Demand is Centered on Practical, High-Quality Homes

**75% prefer single-family homes**, with nearly **60% targeting 1,500–2,500 sq. ft.**—a consistent 5-year trend toward “right-sized” living over both downsizing and excess.

# Purchase

Are you planning to buy or rent a home in a master-planned community?

- ▶ **55%** Buy
- ▶ **38%** Not sure
- ▶ **7%** Rent



# Purchase

How soon do you plan on buying?

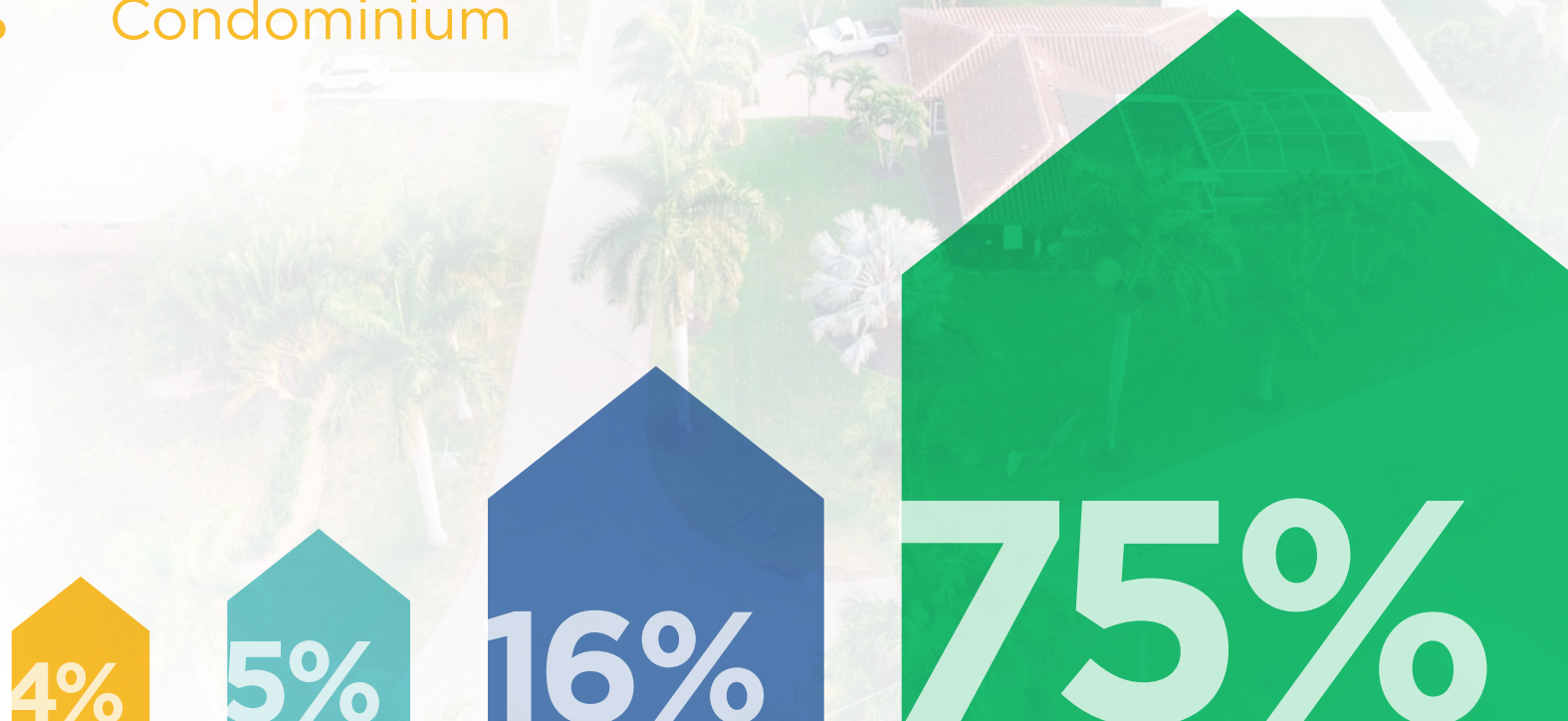
- ▶ **39%** Within two years
- ▶ **32%** Within one year
- ▶ **16%** More than two years from now
- ▶ **13%** Within 6 months



# Purchase

Which property type are you most interested in owning?

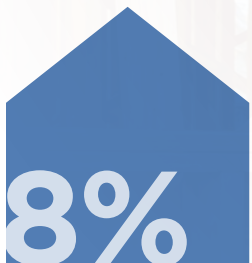
- ▶ **75%** Single-Family Home
- ▶ **16%** Villa/Townhome
- ▶ **5%** Lot/Custom Build
- ▶ **4%** Condominium



# Purchase

Do you prefer new construction or resale homes?

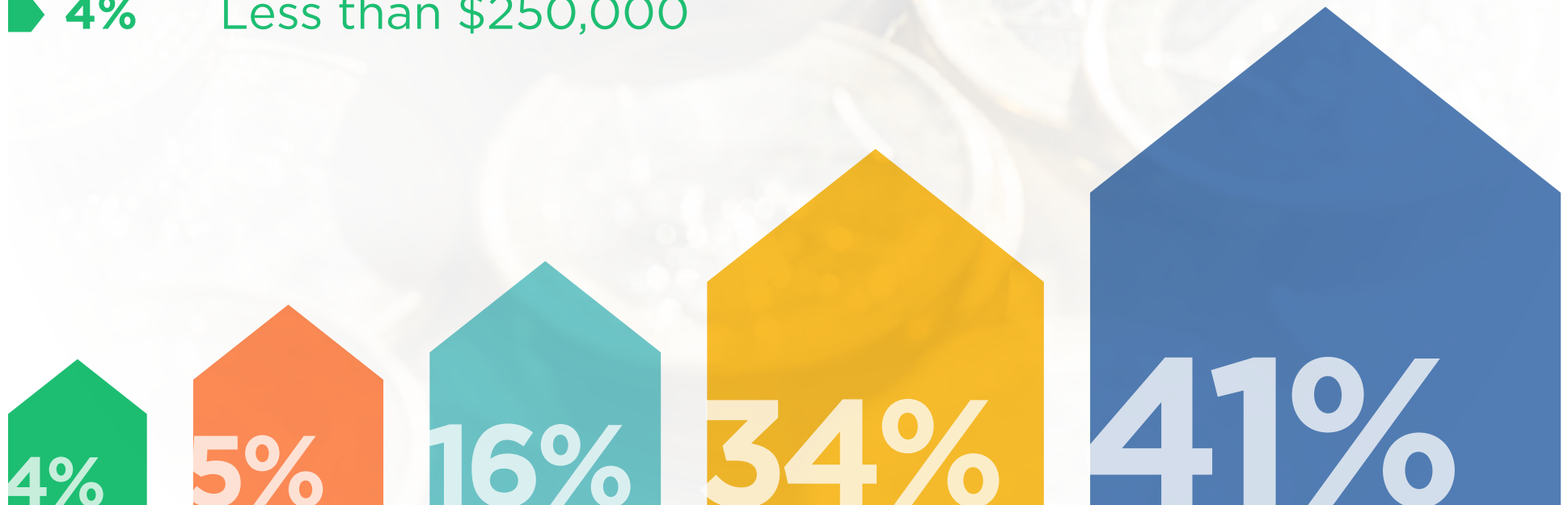
- ▶ **56%** No preference
- ▶ **36%** New construction
- ▶ **8%** Resale



# Purchase

What is the approximate price range for this next home?

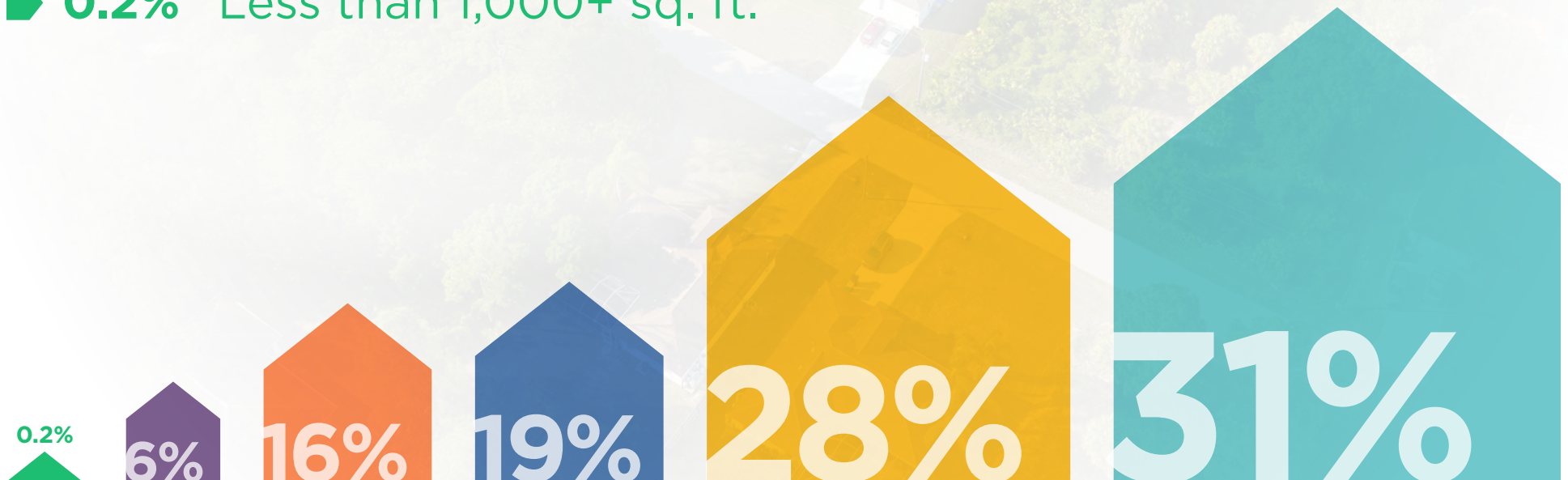
- ▶ **41%** \$250,000 to \$500,000
- ▶ **34%** \$500,000 to \$750,000
- ▶ **16%** \$750,000 to \$1 million
- ▶ **5%** \$1 million +
- ▶ **4%** Less than \$250,000



# Purchase

How much square footage do you prefer?

- ▶ **31%** 2,000-2,500 sq. ft.
- ▶ **28%** 1,500-2,000 sq. ft.
- ▶ **19%** 1,000-1,500 sq. ft.
- ▶ **16%** 2,500-3,000 sq. ft.
- ▶ **6%** 3,000+ sq. ft.
- ▶ **0.2%** Less than 1,000+ sq. ft.



# Purchase

Do you plan to own more than one home?

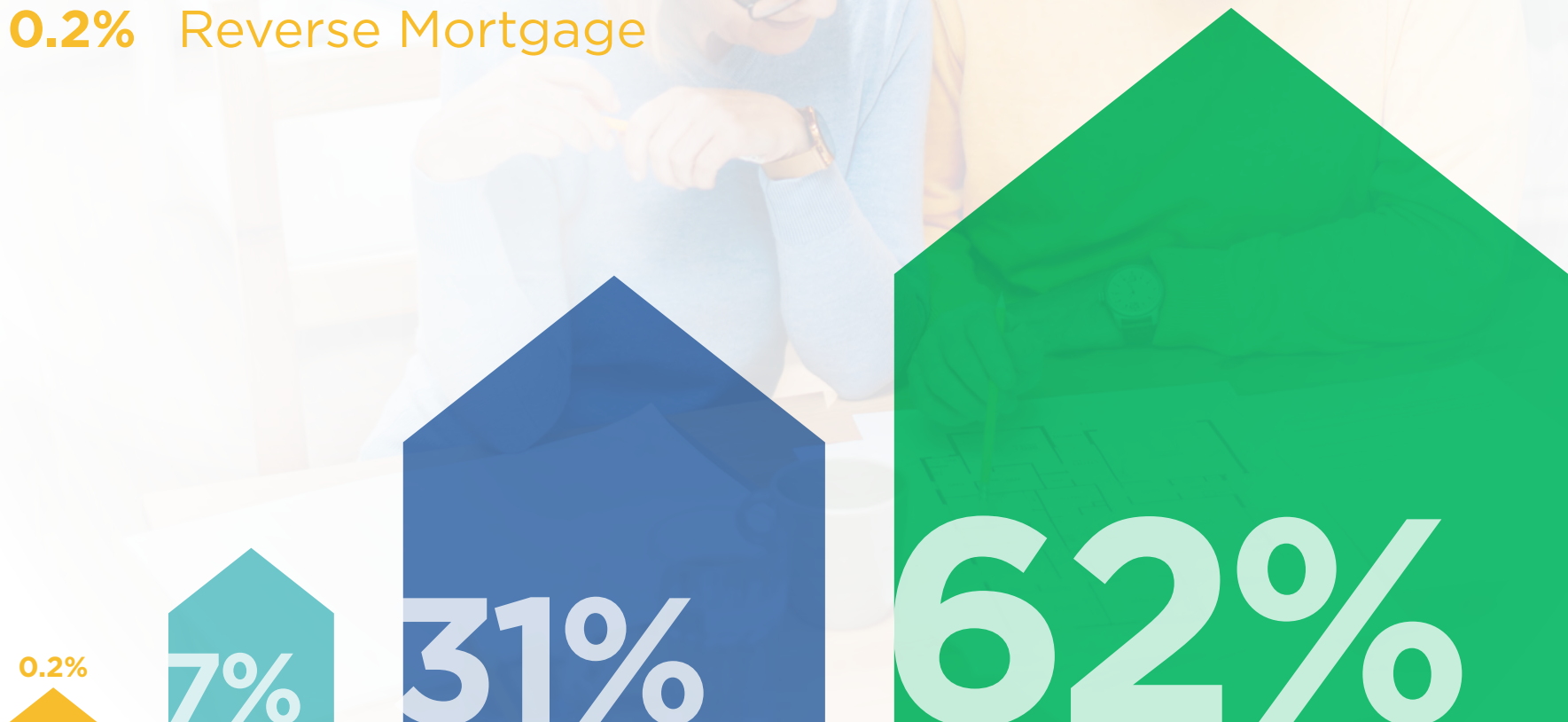
- ▶ **58%** No, I will sell my current home before I move.
- ▶ **20%** Yes, I will have multiple homes.
- ▶ **17%** Undecided
- ▶ **5%** I already have more than one home.



# Purchase

How do you plan to finance your new home?

- ▶ **62%** Cash
- ▶ **31%** Conventional Mortgage
- ▶ **7%** Other
- ▶ **0.2%** Reverse Mortgage



# Rent

Which type of residence do you prefer to rent?

- ▶ **48%** Single-Family Home
- ▶ **26%** Not sure
- ▶ **26%** Apartment



# Rent

How much do you plan to spend on monthly rent?

- ▶ **44%** More than \$2,000
- ▶ **30%** \$1,500 - \$2,000
- ▶ **12%** Not sure
- ▶ **12%** \$1,000 - \$1,499
- ▶ **2%** \$500 - \$999



## OVERVIEW

# Lifestyle

Lifestyle continues to be the primary driver behind relocation decisions, but expectations have matured. What once differentiated communities—wellness amenities, low-maintenance living, and social environments—has increasingly become the standard, requiring communities to deliver more than just the basics.

### Lifestyle Motivations Remain Consistent Over Time

*Retirement (48%) and warm weather (46%) continue to lead relocation decisions*, with 62% still planning to move to a new state—down from post-pandemic highs but still dominant.

### Active Adult Living Remains the Core of Demand

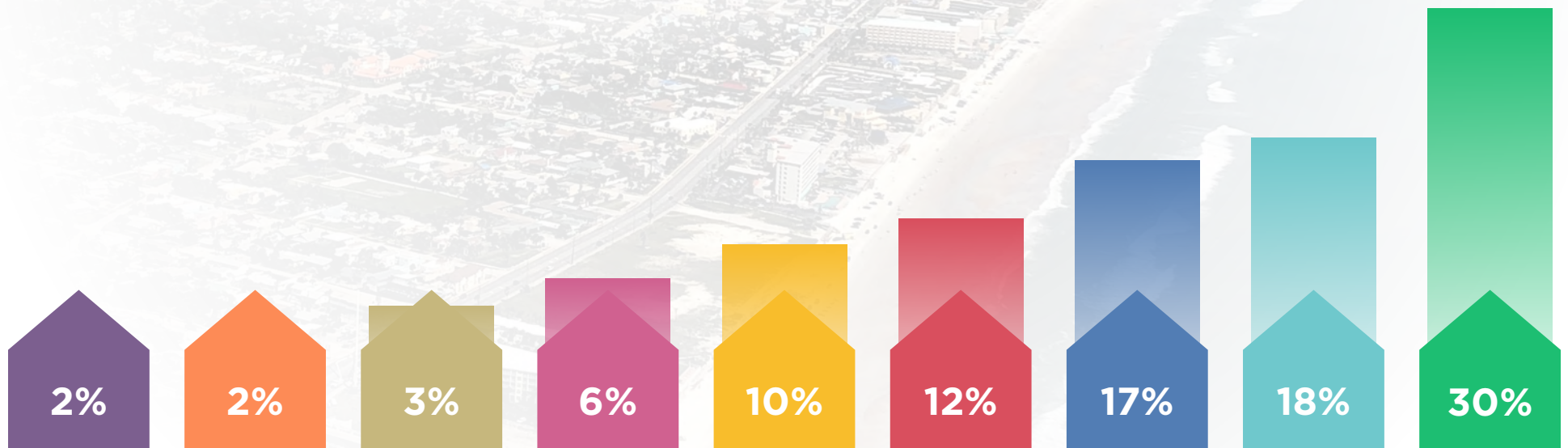
*45% of buyers prefer 55+ communities*, with top drivers including amenities (84%) and low-maintenance living (61%)—a pattern that has held steady for the past several years.

### Wellness and Convenience Have Shifted from Premium to Expected

*Over 70% of buyers prioritize trails, pools, and fitness centers*, while 66% seek low-maintenance homes—highlighting a long-term shift toward lifestyle standardization across communities.

# Lifestyle

What kind of location would you like to relocate to?



# Lifestyle

Are you planning to relocate within your current state or to a new state/country?

▶ **62%** Relocate to new state

▶ **27%** Undecided

▶ **10%** Stay in current state

▶ **0.1%** Relocate to new country

0.1%

10%

27%

62%

# Lifestyle

Why are you relocating?

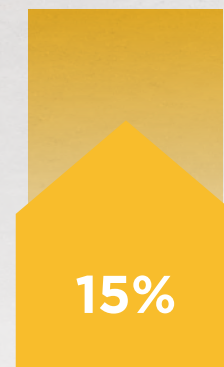
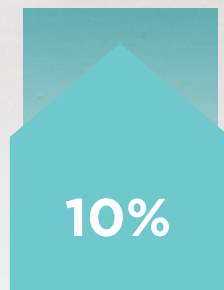
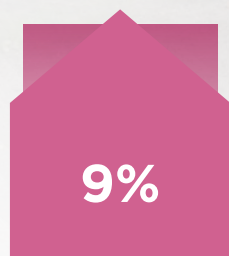
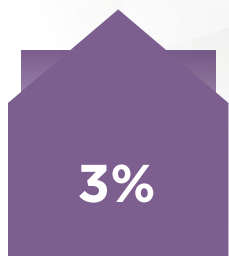
- ▶ **48%** Retirement
- ▶ **46%** Seeking warm weather
- ▶ **27%** Change of scenery
- ▶ **27%** Downsizing
- ▶ **26%** Tax/financial reasons
- ▶ **14%** To be near family
- ▶ **7%** Other
- ▶ **0.4%** Job



# Lifestyle

Which type of community best describes the lifestyle you are you looking for?

- ▶ **45%** Active Adult/Retirement/55+
- ▶ **18%** Gated
- ▶ **15%** Neo-Traditional
- ▶ **10%** Country Club
- ▶ **9%** Other
- ▶ **3%** Family Friendly



# Lifestyle

Why do you want to live in an active adult/retirement/55+ community?

▶ **84%** Active lifestyle amenities

▶ **61%** Low-maintenance living

▶ **47%** Sense of community

▶ **34%** Age-restricted/kid-free environment

▶ **3%** Other

3%

34%

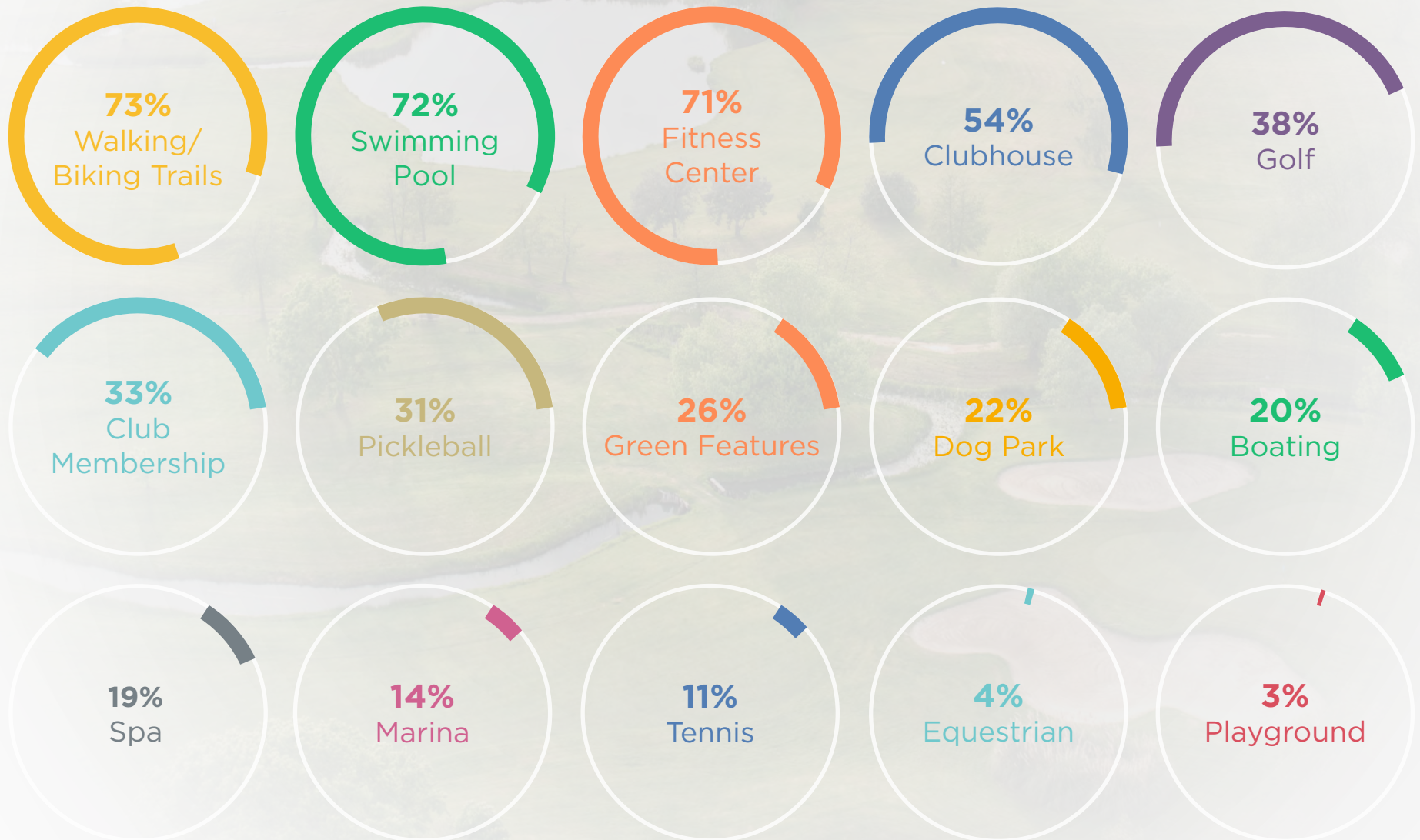
47%

61%

84%

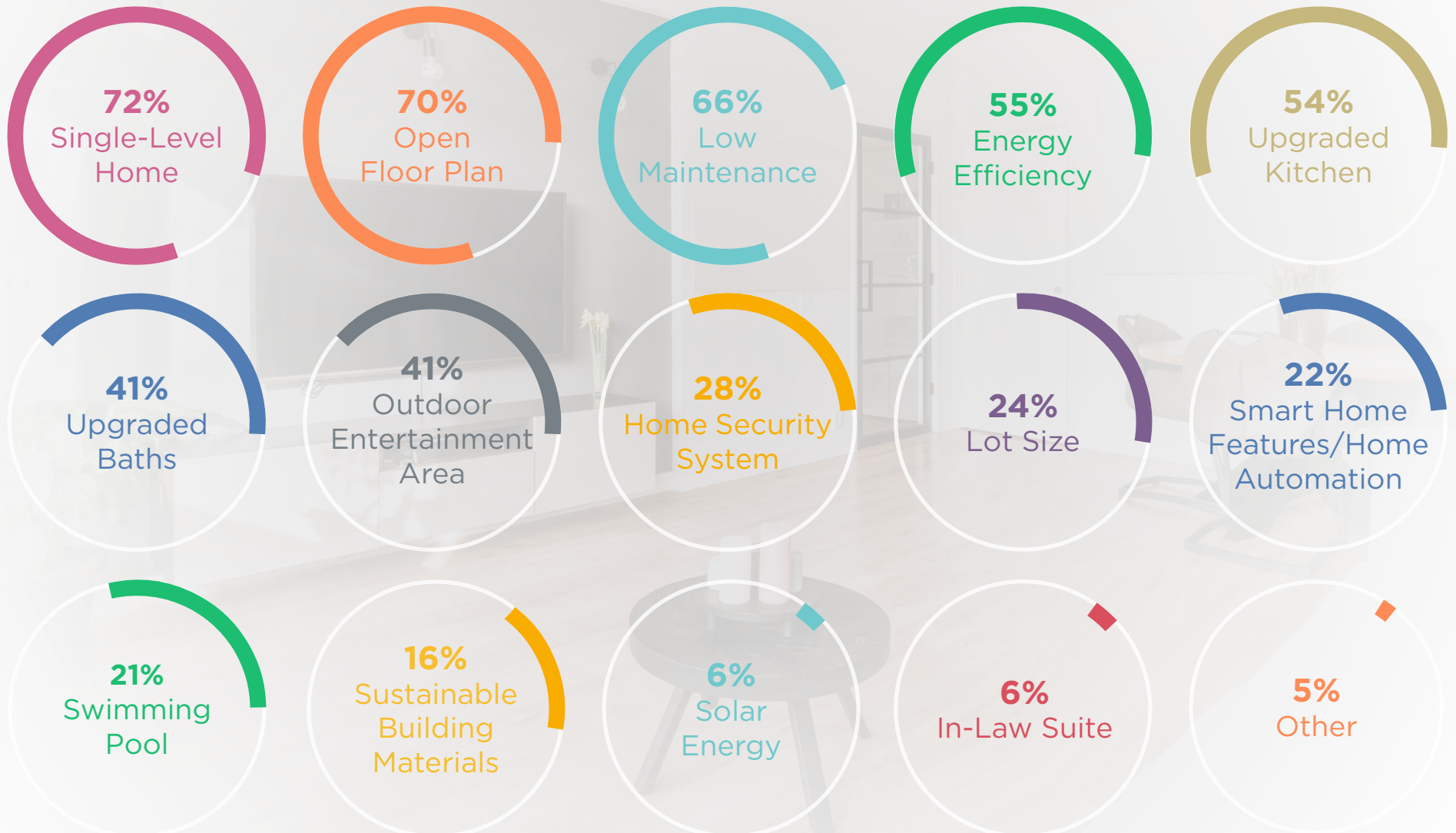
# Lifestyle

Which amenities/activities must your community offer?



# Lifestyle

Which home features are important to you?



## OVERVIEW

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# Persona

The modern lifestyle buyer is highly digital, research-driven, and increasingly influenced by emerging technologies. While traditional channels like websites and email remain dominant, AI is beginning to reshape how buyers discover and evaluate communities.

### The Home Search Remains Overwhelmingly Digital-First

**92% of buyers begin with online search**—a consistent year over year trend, though longer timelines suggest deeper and more prolonged research cycles.

### Email Remains the Dominant Communication Channel

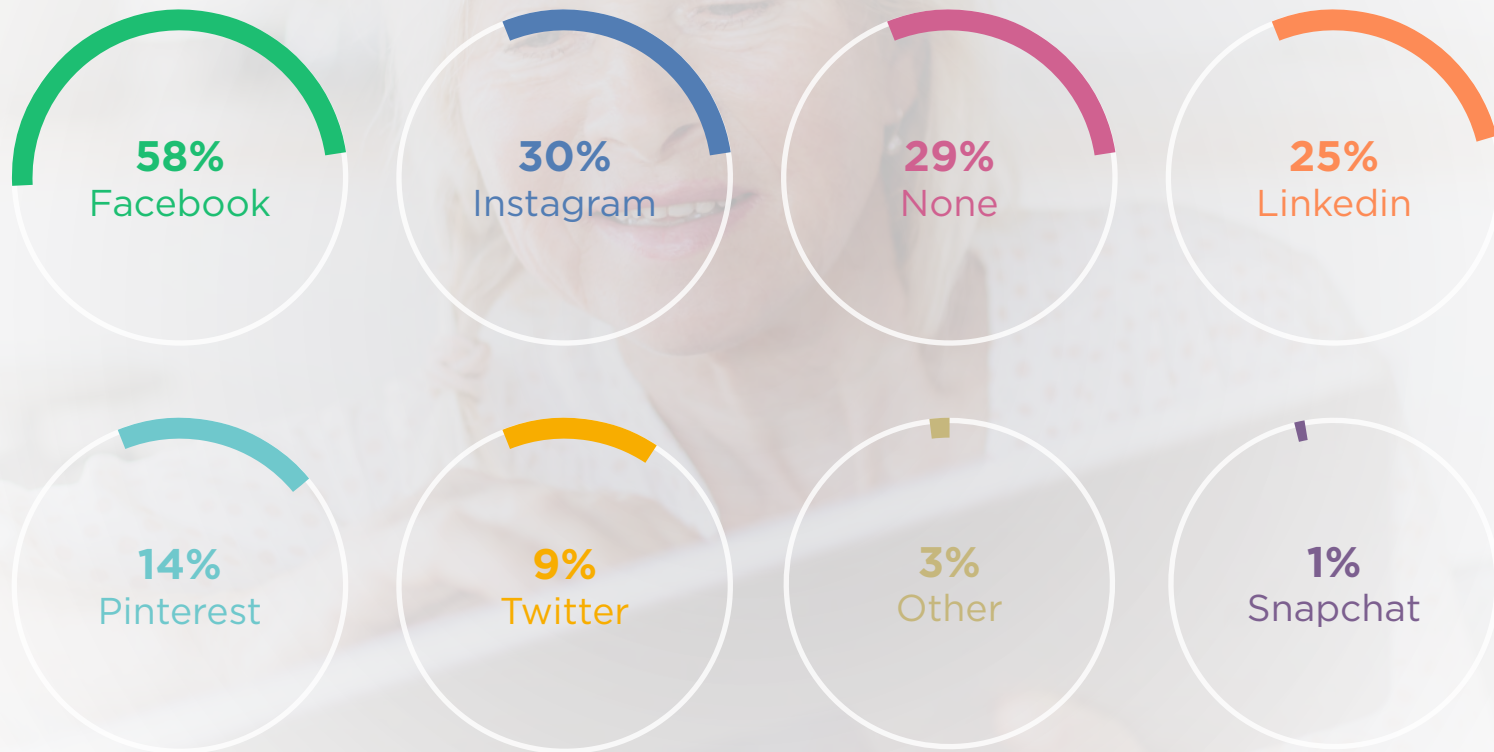
**88% prefer email when requesting information**, reinforcing its continued importance for lead nurturing and conversion.

### AI is Emerging, But Not Replacing Traditional Search

**21% of buyers are actively using AI tools, with 39% planning to.** However, 90% still click through to websites, confirming that AI complements the buyer journey.

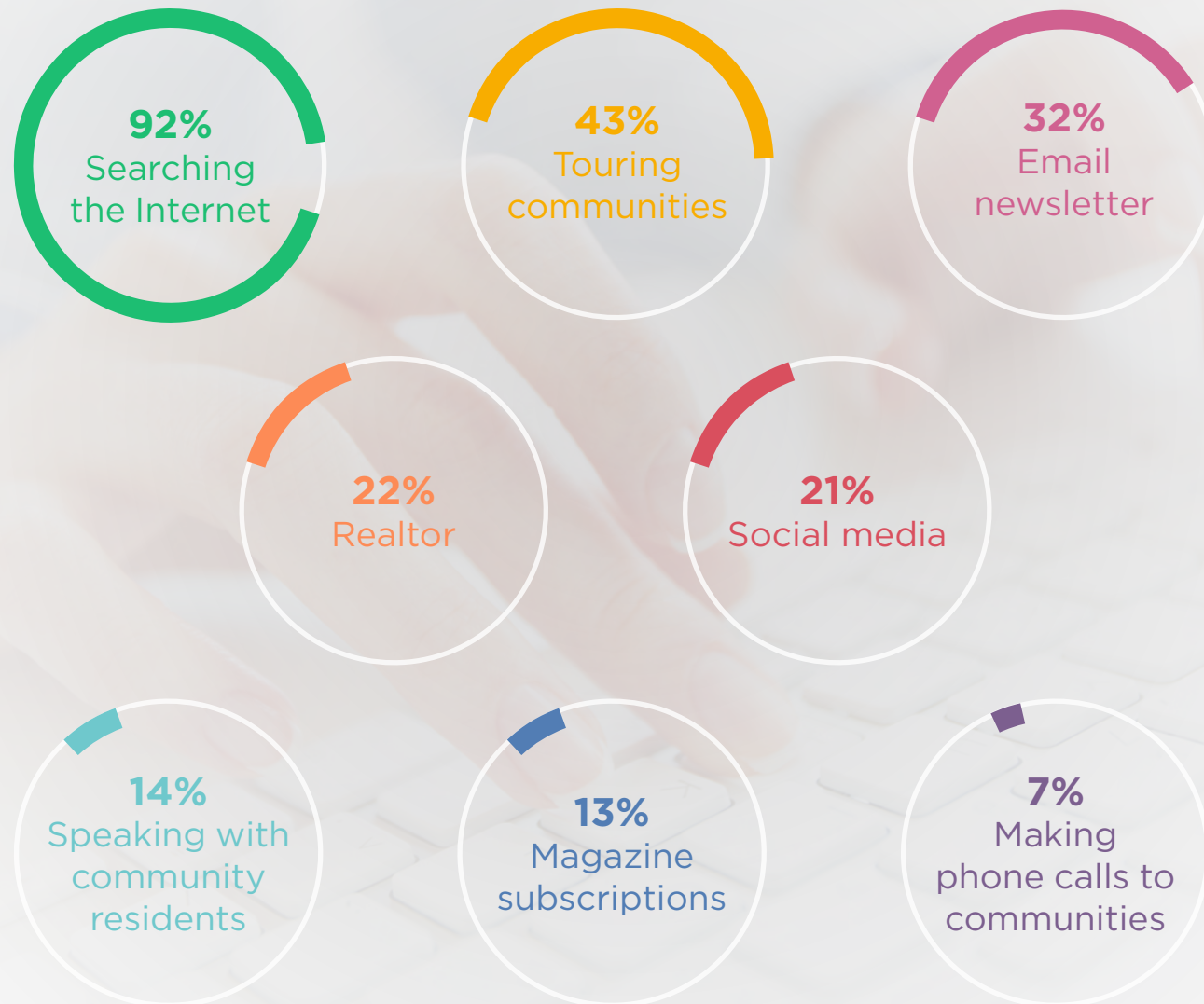
# Persona

Which social media platforms do you use?



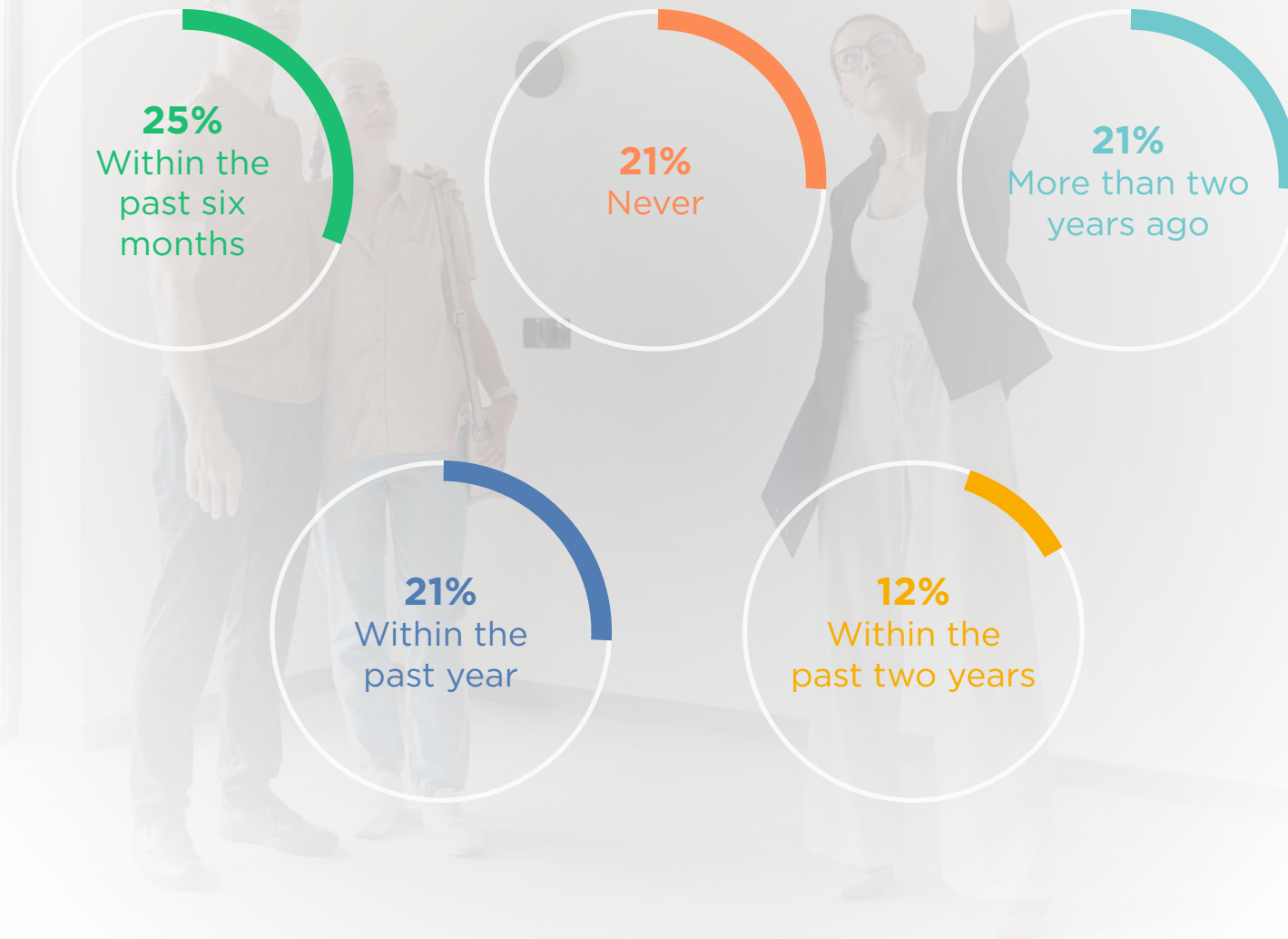
# Persona

Which methods are you using to research communities?



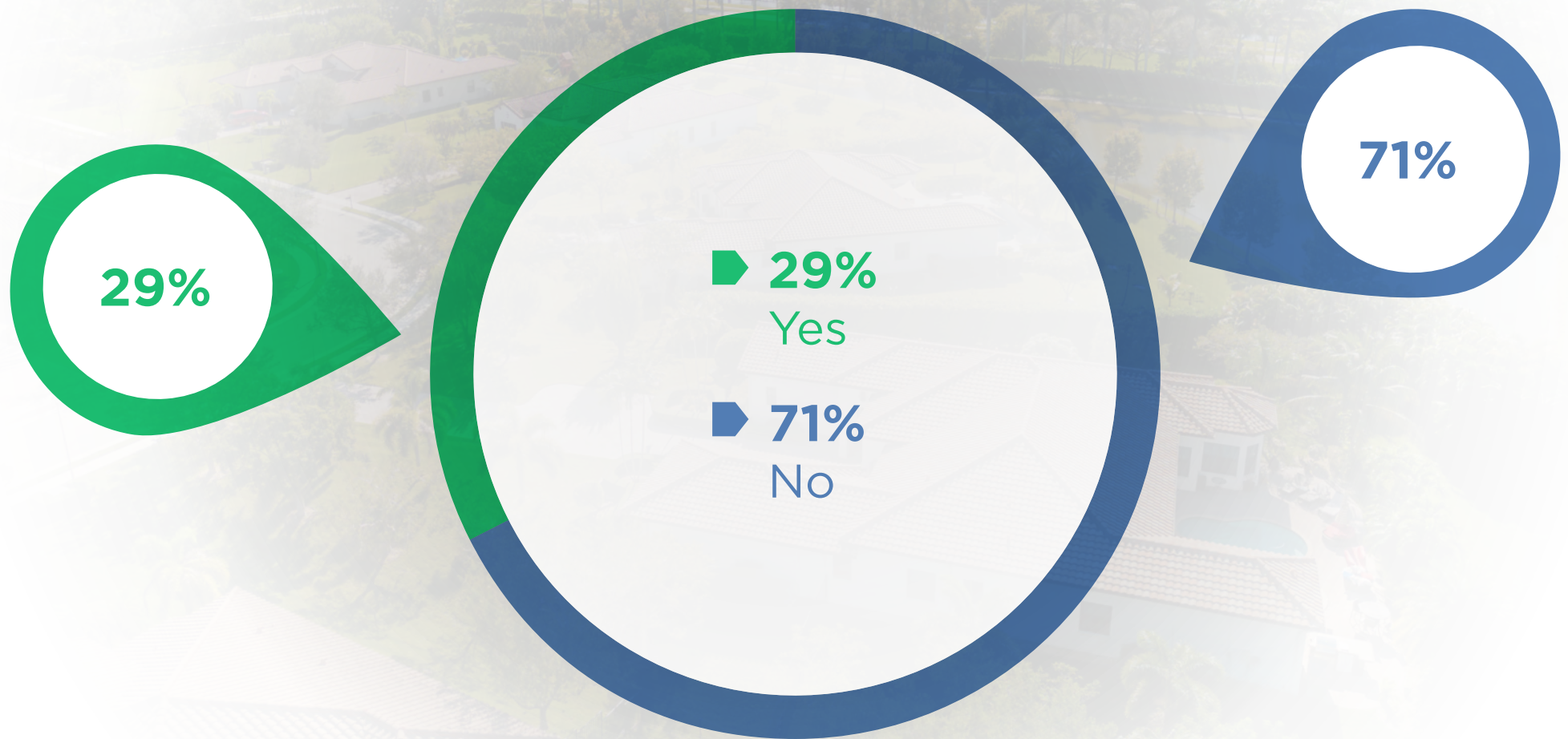
# Persona

When was the last time you toured a community?



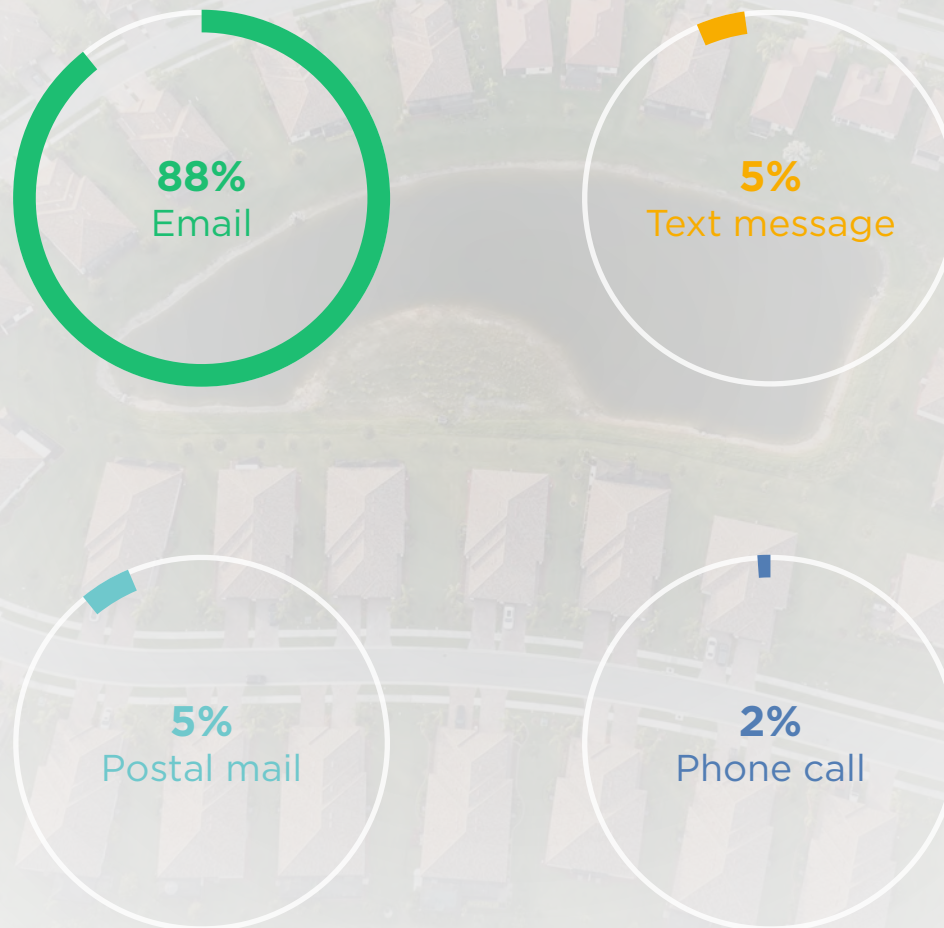
# Persona

Was this part of a “discovery” or “stay and play” package?



# Persona

How do you prefer to be contacted when requesting information about communities?



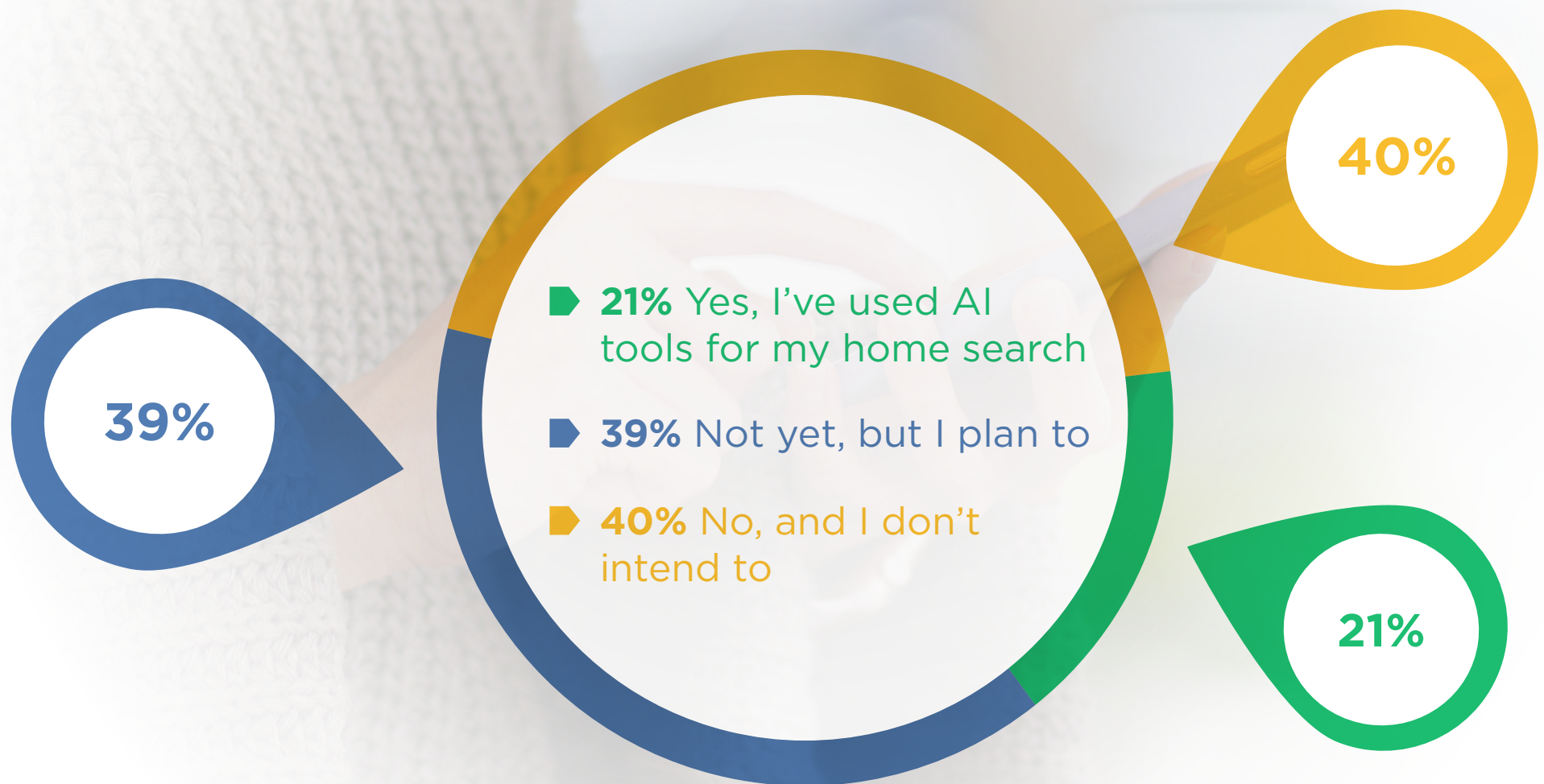
# Persona

When searching for communities or homes online, have you noticed AI-generated search results (for example, summaries or answers appearing at the top of Google)?



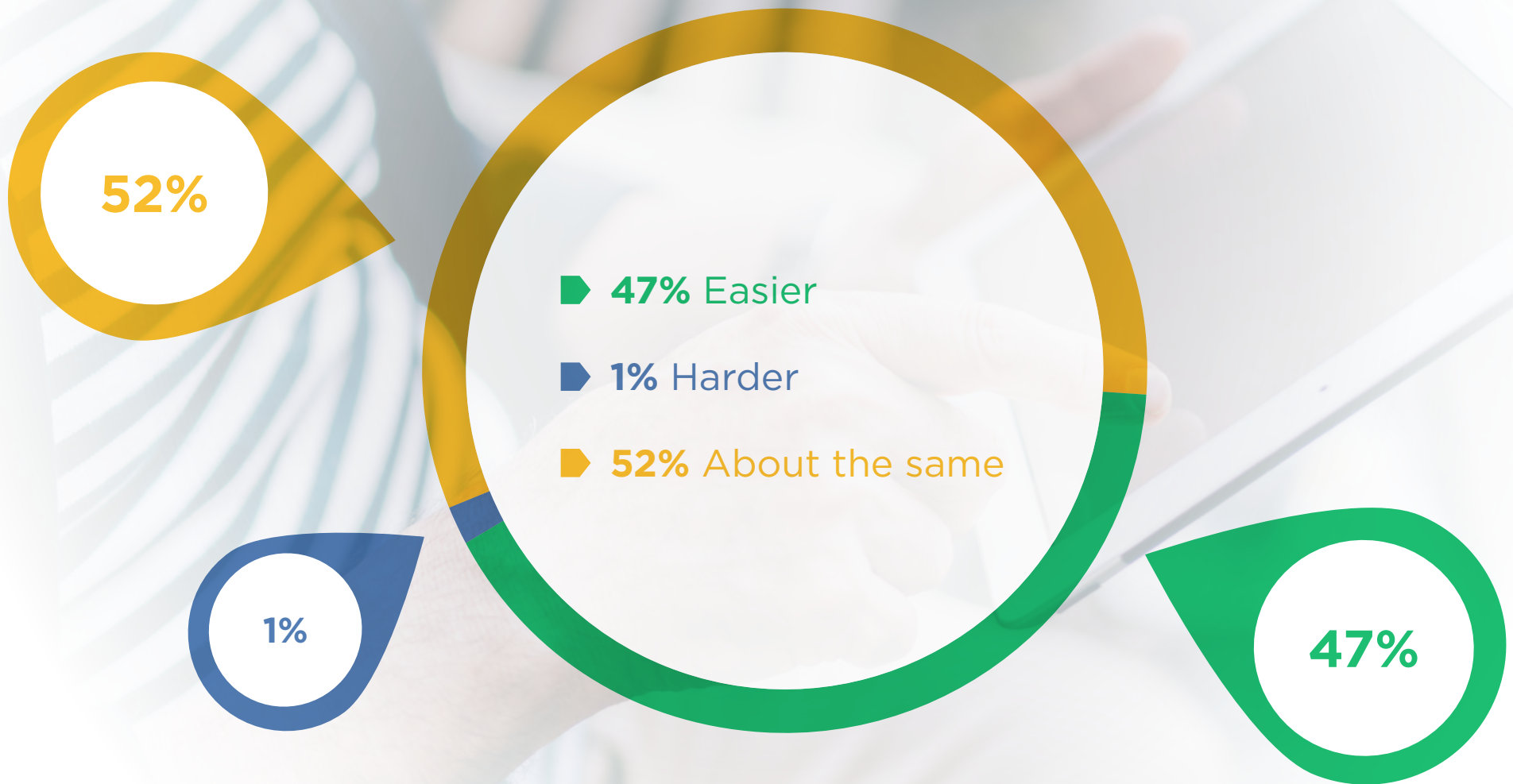
# Persona

Have you used AI tools (like ChatGPT, Google's AI Overview, or Microsoft Copilot) to help you find information about where to live or which community might fit your lifestyle?



# Persona

Do you feel AI-generated results have made it easier or harder to find the information you're looking for about lifestyle communities?



# Persona

When you see AI-generated answers in your search results, do you still click through to websites if a link/source is provided?



# Contact Us



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