**Home Design Products (Windows & Doors, Cabinetry, Paint & Wallpaper) 2022**

**Home Buying and Remodeling Are Primary Drivers**

The home-buying market remains challenging at the beginning of 2022 with a limited supply of new and existing homes. Housing starts, however, increased 2.5% during 2021 and single-family homes in the construction phase increased by 26% during January 2022.

The Joint Center for Housing Studies of Harvard University (JCHS) forecasts substantial remodeling/home improvement spending during the first three quarters of 2022 before moderating during Q4 2022, but spending will remain robust.

Supply chain issues persist, however. According to The Farnsworth Group’s PRO Home Improvement Monthly Tracker for January 2022, 56.5% of surveyed remodelers said material pricing at 56.5% and material availability at 54.2% were their top two challenges.

**National Association of Home Builders/Wells Fargo Housing**

**Market Index\*, by Region, September 2021–January 2022**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Region | Sept. 2021 | Oct 2021 | Nov 2021 | Dec 2021 | Jan 2022 |
| United States | 76 | 80 | 83 | 84 | 83 |
| Northeast | 67 | 73 | 69 | 80 | 71 |
| Midwest | 69 | 72 | 75 | 76 | 74 |
| South | 80 | 84 | 87 | 89 | 87 |
| West | 80 | 85 | 88 | 87 | 88 |

National Association of Home Builders/Wells Fargo, January 2022 \*based on a 100-point scale

**Dealers Are Expecting a Good 2022**

Despite fewer housing starts forecast for 2022 compared to 2021, window dealers, manufacturers and suppliers are advised to prepare for increased demand because approximately one million new homes are needed, and existing homes are aging.

*Door and Window Market Magazine*’s 2022 Industry Outlook survey reported 71% of door and window dealers, manufacturers and suppliers consider the current business environment favorable: “very favorable” at 28% and “somewhat favorable” at 43%.

The Industry Outlook Survey revealed almost three-quarters (72%) of those surveyed said their sales increased 10% or more during 2021 compared to 2020. They are not as optimistic about 2022, as 51% expected their sales to increase 10% or more.

**Top 10 Products Home Improvement Contractors**

**Have Had Trouble Finding\*, February 2022**

|  |  |
| --- | --- |
| Product | Percent |
| Building materials (roofing, etc.) | 35.8% |
| Windows and doors | 28.6% |
| Paint and paint supplies | 18.3% |
| Lighting and accessories | 13.3% |
| Storage, shelving and organizational products | 2.8% |

The Farnsworth Group, February 2022 \*during the past month

**Cabinet Sector Sales Are Strong, But With Slight Declines**

With the strong surge in home improvement projects during 2021, total cabinet sales for the first 11 months of increased 14.6% YOY. Significant YOY increases also occurred in the subcategories: custom at 20.1%, semi-custom at 10.8% and stock at 16.2%.

November 2021 sales, however, all decreased compared to October 2021: total sales at -3.4%, custom at -3.2%, semi-custom at -4.7% and stock at -2.5%, which is often the trend as fewer home improvement projects occur during the year-end holiday period.

By comparison, September 2021 sales increased in all categories compared to August 2021: total sales at +5.7%, custom at +19.9%, semi-custom at +5.8% and stock at +2.9%.

**Homeowners’ Primary Choices of New Kitchen Cabinet Materials, July 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Material | Percent | Material | Percent |
| #1: Solid wood | 76% | #5: Particleboard | 4% |
| #2: Plywood | 20% | #6: Acrylic | 1% |
| #3: Medium-density fiberboard | 14% | #7: Stainless steel | 1% |
| #4: Glass | 7% | #8: Other | 3% |

Houzz, October 2021

**Homeowners’ Favorites in Kitchen and Bath Cabinets**

According to the 2021 Houzz US Bathroom Trends Study, one-third (34%) of surveyed homeowners said custom cabinets were their first style choice for their bathroom, with stock second at 22%, semi-custom third at 22% and ready-to-assemble fourth at 8%.

The 2022 Houzz Kitchen Trends Study found shaker was the overwhelming first choice among consumers for the primary door style of upgraded cabinets at 64%. This was an eight-percentage-point increase from the 2021 study.

Blue was the first color choice among 26% of homeowners for upgraded island kitchen cabinets of a different color than the main cabinetry color. For bathroom vanities, white remained the first choice at 32%, with wood at 27%, gray at 16% and blue at 8%.

**Specialty Storage in Upgraded Kitchen Cabinets, July 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| By Organizer Type | Percent | By Tray/Drawer Type | Percent |
| #1: Cookie sheets/trays | 48% | #1: Pullout waste or recycling | 60% |
| #2: Spices | 39% | #2: Cutlery | 35% |
| #3: Deep drawer | 36% | #3: Pullouts/swing-out | 34% |
| #4: Revolving (Lazy Susan) | 38% | #4: Small appliances | 22% |
| #5: Utensils | 30% | #5: Pullout corner | 18% |
| #6: Pots and pans | 30% | #6: Wine or bar storage | 15% |
| #7: Dishes | 12% | #7: Pet-feeding station | 4% |

Houzz, January 2022

**Consumer Paint Trends**

Data from five representative 2021 consumer/market surveys conducted by The Media Audit reveals the average age of adults 18+ planning an interior paint or wallpaper project during the next 12 months is 45.6 and their average income is $78,600.

For a planned exterior paint project during the next 12 months, the average age is 42.1 and the average income is $81,770.

Millennials over-indexed the most for interior paint/wallpaper and exterior paint projects at averages of 118 and 137, respectively. Gen Zers over-indexed for exterior paint projects (avg. 106), but under-indexed for interior paint or wallpaper projects (avg. 78).

**Adults 18+ Who Plan an Interior Home Improvement Paint Project\* and**

**Their Workplace Status, by Indices, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Workplace Status | Miami-Ft. Lauderdale | Nashville | Minneapolis-St. Paul | Austin | Monterey-Salinas, CA |
| Employed full-time, work from home | * 153 | * 113 | * 113 | * 103 | 162 |
| Employed part-time, work from home | * 88 | * 157 | * 171 | * 153 | * 182 |
| Employed full-time, not work from home | 109 | * 101 | * 99 | * 118 | * 48 |
| Employed part-time, not work from home | * 54 | * 121 | * 77 | * 17 | * 58 |

Based on The Media Audit’s 2021 surveys \*during the next 12 months

**Consumer Window Replacement Trends**

Analyzing the same five 2021 consumer/market surveys from The Media Audit shows the average age of adults 18+ planning to replace windows during the next 12 months is 42.3 and their average income is $73,730.

Unsurprisingly, Millennials over-indexed the most for a window-replacement project with an average of 141.4, but Gen Zers were slightly under-indexed at an average of 98. Gen Xers, Baby Boomers and the Silent Generation all under-indexed by at least 23 points.

**Adults 18+ Who Plan a Window-Replacement Project\* and**

**Their Heavy Exposure to Media, by Indices, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Media | Miami-Ft. Lauderdale | Nashville | Minneapolis-St. Paul | Austin | Monterey-Salinas, CA |
| Radio (180+ min. during avg. day) | * 110 | * 95 | * 164 | * 128 | 142 |
| TV (300+ min. during avg. day) | * 104 | * 102 | * 101 | * 58 | * 85 |
| Newspaper (60+ min. during avg. day) | * 193 | * 115 | * 188 | * 225 | * 228 |
| Outdoor (200+ miles during avg. week) | * 84 | * 78 | * 155 | * 163 | * 124 |
| Direct mail (read 75%+ weekly) | * 117 | * 145 | * 146 | * 197 | * 175 |
| Internet (180+ min. during typ. day) | * 102 | * 113 | * 91 | * 72 | * 117 |
| Social media (180+ min. during typ. day) | * 122 | * 100 | * 114 | * 127 | * 102 |
| Audio streaming (180+ min. during typ. day) | * 123 | * 135 | * 166 | * 105 | * 151 |
| Video streaming (180+ min. during typ. day) | 125 | * 81 | * 104 | * 86 | * 142 |
| Podcast listening (180+ min. during avg. day) | * 232 | * 121 | * 227 | * 87 | * 281 |

Based on The Media Audit’s 2021 surveys \*during the next 12 months

**More Valuable Insights**

**Top Manufacturers and Dealers in J.D. Power 2021 US Window and**

**Patio Doors Satisfaction StudySM, January–May 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Manufacturer | Score\* | Retailer | Score\* |
| #1: Renewal by Andersen | 886 | #1: Renewal by Andersen | 876 |
| #2: American Craftsman | 878 | #2: The Home Depot | 876 |
| #3: Milgard | 874 | #3: Window World | 874 |
| #4: Marvin | 865 | Industry average | 860 |
| Industry average | 863 | #4: Lowe’s | 826 |
| #5: Andersen | 861 |  |  |
| #6: Pella | 861 |  |  |
| #7: Crestline (Weather Shield) | 845 |  |  |
| #8: JELD-WEN | 837 |  |  |
| #9: Champion | 835 |  |  |
| #10: Harvey | 828 |  |  |

J.D. Power, August 2021 \*based on a 1,000-point scale

*Sources:* Builder Website, 2/22; National Association of Home Builders Website, 2/22; The Joint Center for Housing Studies of Harvard University Website, 2/22; The Farnsworth Group Website, 2/22; *Door and Window Market* Website, 2/22; Kitchen Cabinet Manufacturers Association Website, 2/22; Houzz Website, 2/22; The Media Audit Website, 2/22; J.D. Power Website, 2/22.

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**Local Market and Station Information**