

America at Home Study

Insights from Wave 4 (6,002 responses) May 2025



Comparing key findings across Waves 1-4 (2020-2025)
Total National Responses = 15,938





Photos:
GARMAN
HOMES

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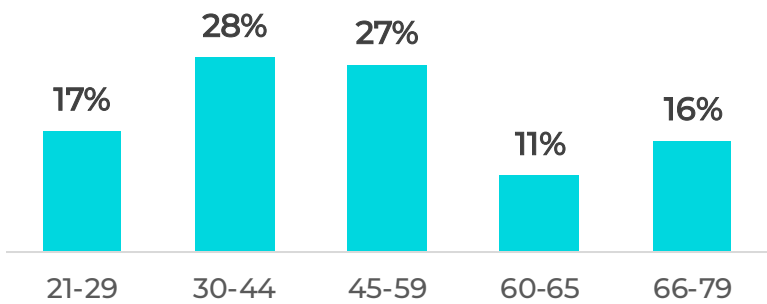
Respondent Demographics

**Representative of
U.S. Census**

May 2025 n= 6,002
15,938 total responses 2020-2025

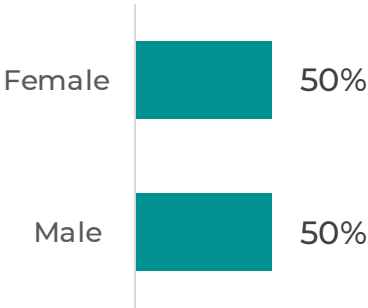
Demographics: Survey of 6,002 respondents 21-75yrs, HHI \$50K+

Age



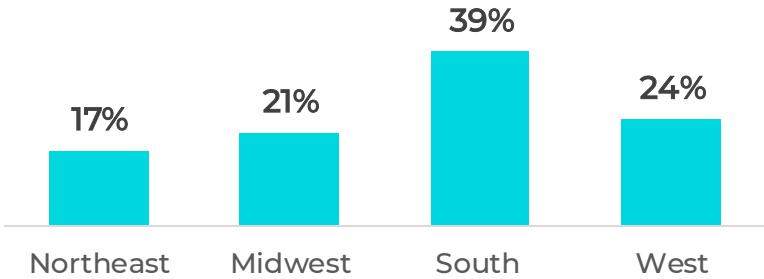
S1. How old are you? n=6,002

Gender



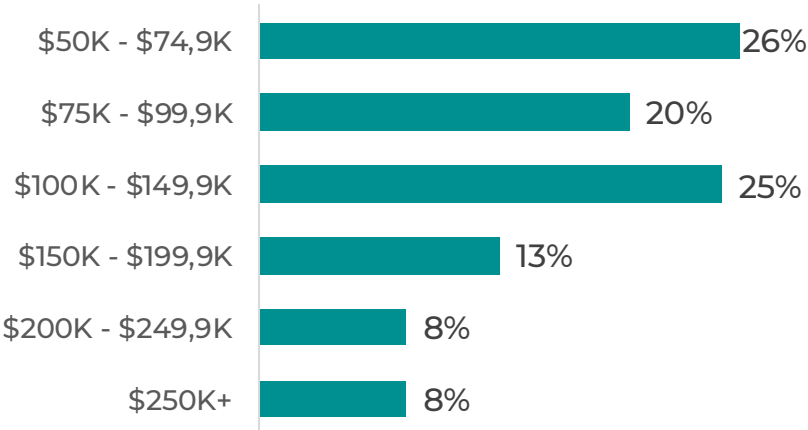
S2. What is your gender? n=6,002

Region



S3. So that we can record by area, please provide your zip code? n=6,002


Household Income



S4. What is the total annual income of everyone living in the household? n=6,002

\$108 K
Median
HHI

Household Dynamics

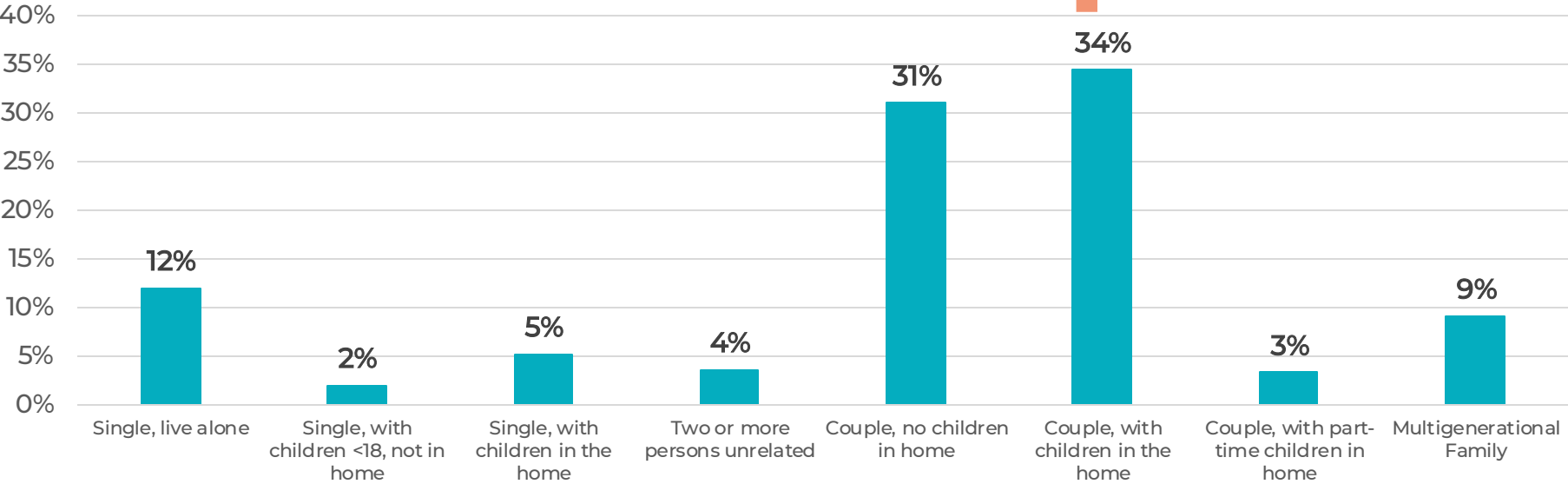
 **30%** Rent (25%) or live With relatives/ friends (5%)

 **70%** Own home or currently buying a home

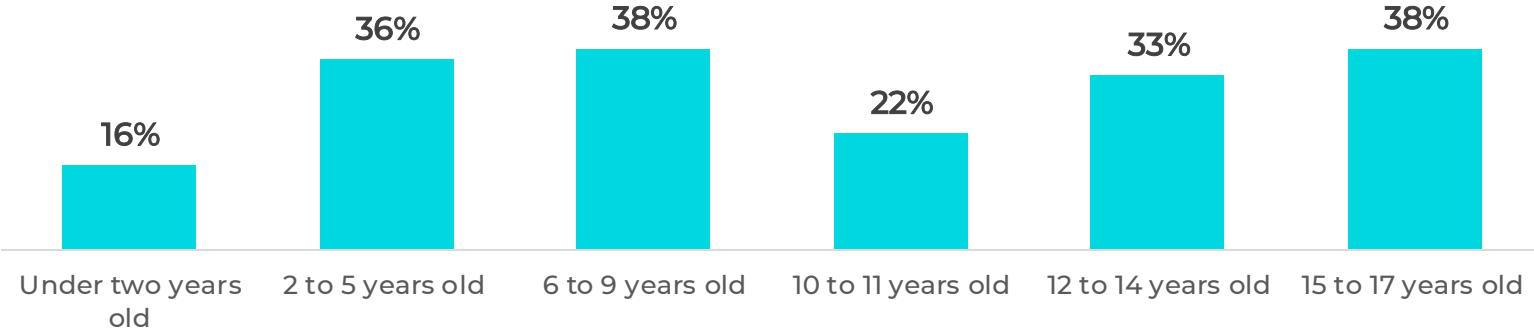
S9. Which of the following best describes your current living situation? n=6,002

Household Make-up

- 23% Single
- 68% Couple
- 9% Multigen family



42%
Households
with children
<18 in home



May 2025 n=6,002.

Generations

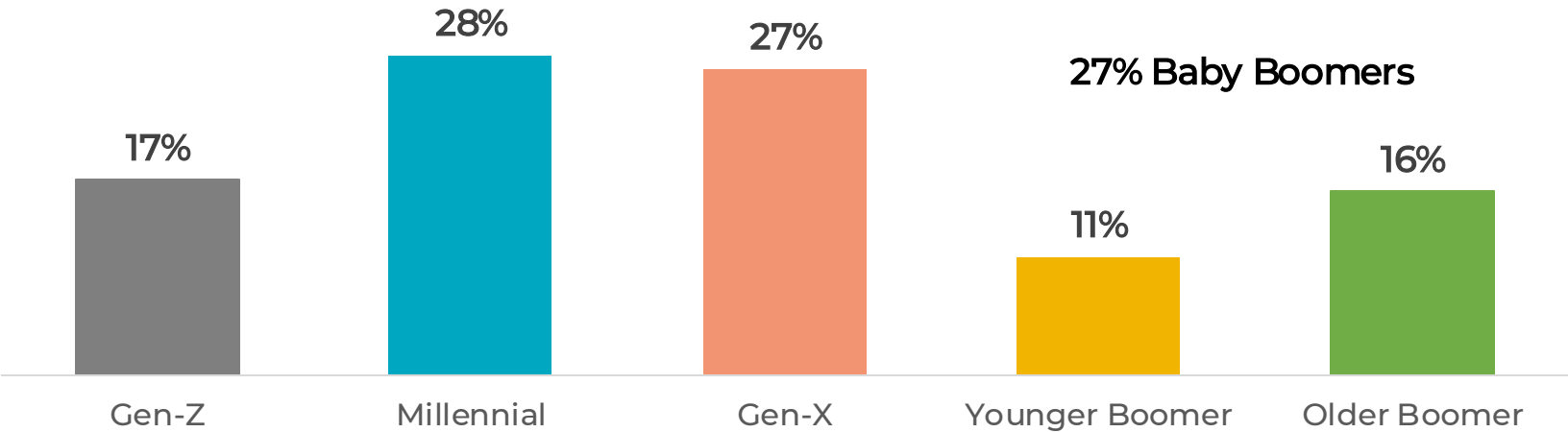
Gen-Z
Age 21-29

Millennial
Age 30-44

Gen-X
Age: 45-59

Younger
Boomer Age:
60-65

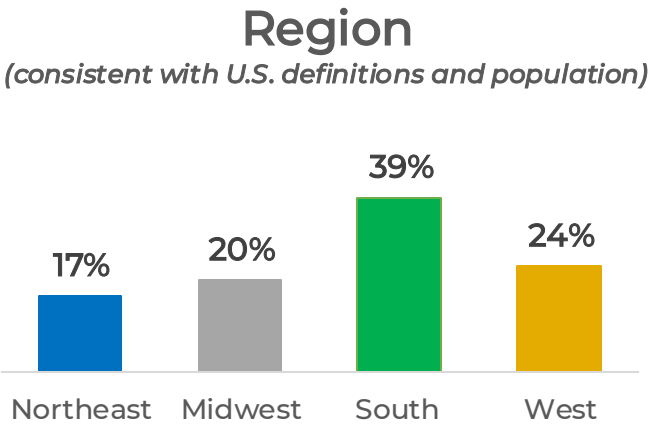
Older
Boomer
Age: 66-79



27% Baby Boomers

May 2025 n=6,002; Gen-Z n=1,043; Millennials n=1,709; Gen-X n=1,636; Younger Boomer n=633; Older Boomer n=981.

Geographic Regions



S3. So that we can record by area, please provide your zip code? n=6,002

S3. So that we can record by area, please provide your zip code? May 2025 n=6,002



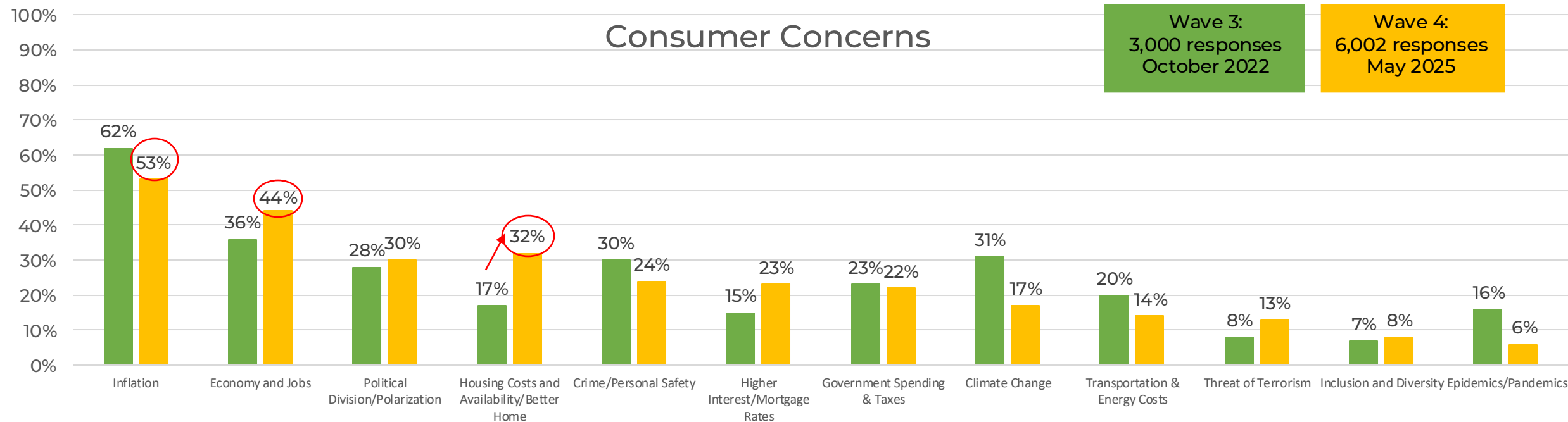
Consumer Motivations

Things Worried About Things Hopeful For

May 2025 n= 6,002
15,938 total responses 2020-2025

What are you most worried about?

Inflation, Economy/Jobs, Housing Costs/Availability are the top three concerns. Concerns Related to Housing Costs and Availability had the Greatest Increase.



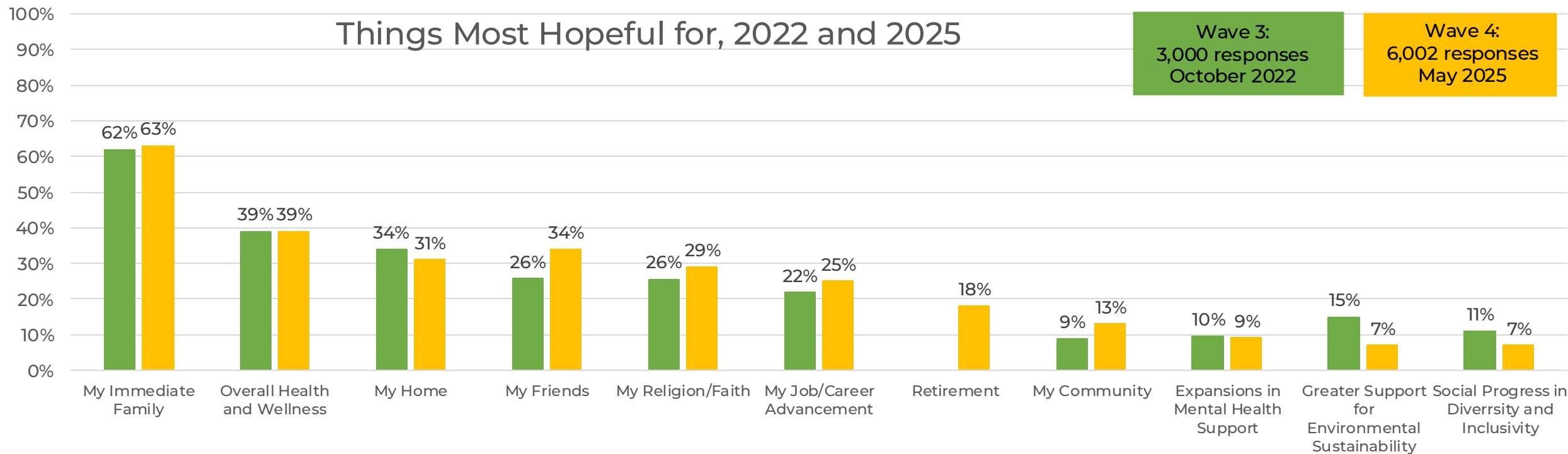
Q2. Which three of the following topics are you most worried about? Total n=9,002; May 2025 n=6,002; October 2022 n=3,000.

A woman with long brown hair, wearing a black blazer, is sitting at a wooden desk. She has her hands pressed against her temples, looking down with a distressed expression. In front of her is an open silver laptop. To the left of the laptop is a white computer mouse on a dark mousepad. In the foreground, a pair of glasses and a closed laptop are visible on the desk. The background is a plain, light-colored wall.

**30% are
less comfortable
making decisions
about home today.**

What are you most hopeful for?

**Most Hopeful for Immediate Family Continues.
Greatest Increase My Friends.
Less Hopeful for Support for Environmental
Sustainability.**



Q3. Which three of the following topics are you most hopeful for? Total n=9,002; October 2022 n=3,000; May 2025 n=6,002.



Meaning of Home

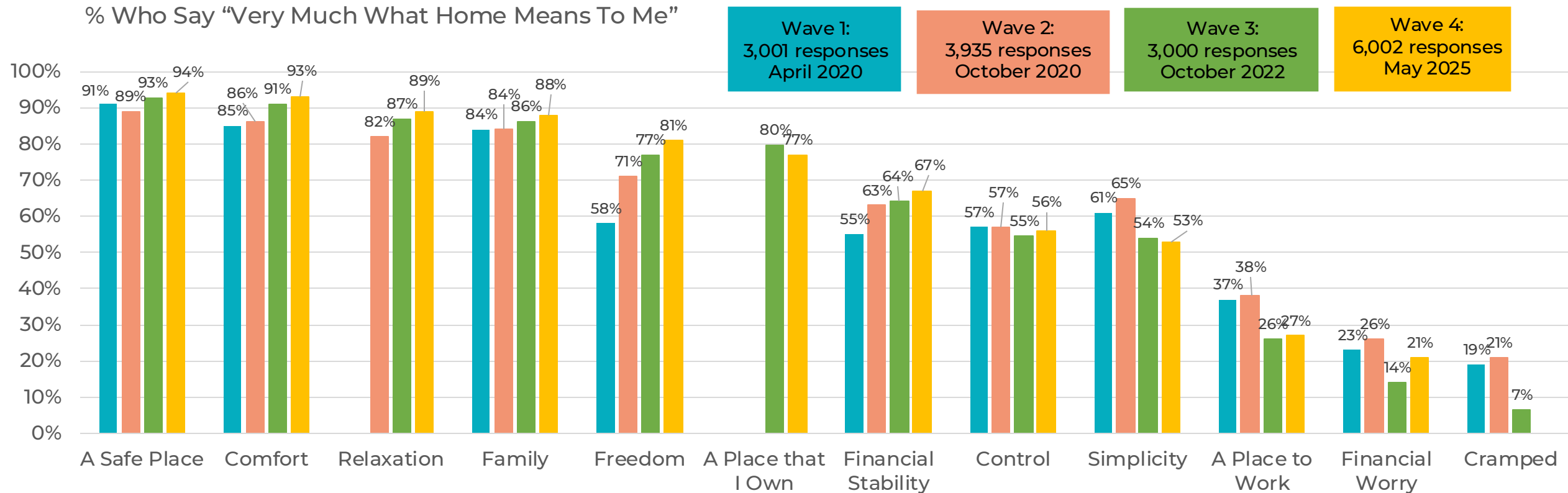
Most Important Room

May 2025 n= 6,002
15,938 total responses 2020-2025

What Does “Home” Mean to You?

Safe Place, Comfort, Relaxation, Family Largest increases in Freedom and Home Financial Stability

% Who Say “Very Much What Home Means To Me”



Q4. What does 'home' mean to you? Total April 2020-May 2025 n=15,938.

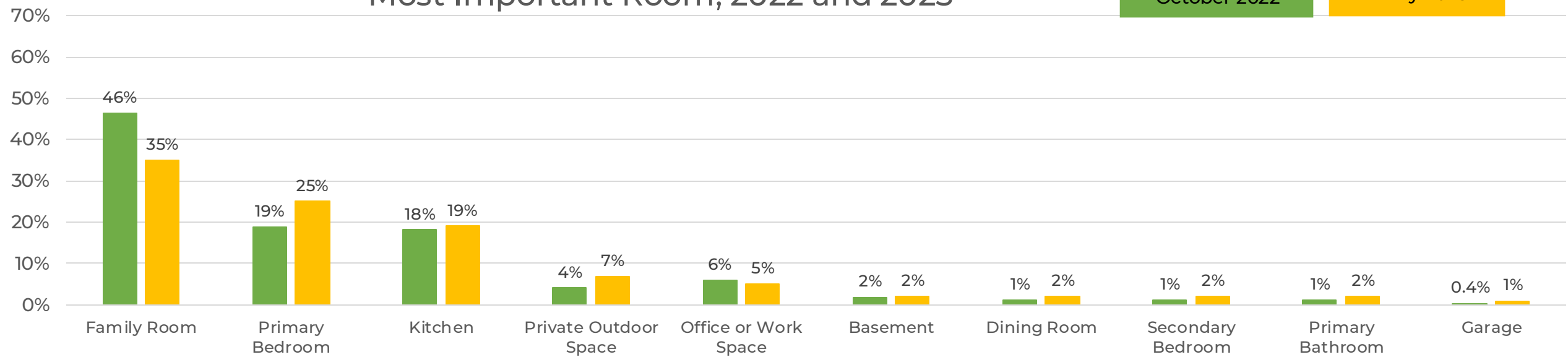
Most Important: Family Room, Primary Bedroom, and Kitchen

Favorite room shifts from Family Room to Primary Bedroom
Increase in Importance of Private Outdoor Space

Wave 3:
3,000 responses
October 2022

Wave 4:
6,002 responses
May 2025

Most Important Room, 2022 and 2025



Q7. What room or space in your home is most important to you? October 2022 n=3000; May 2025 n=6,002.



Home Activities

Doing More/Less of + Most Desired Features

May 2025 n= 6,002
15,938 total responses 2020-2025

Top Activities Engaging More, the Same or Less as Two Years Ago

80-81% of Consumers are Cooking and Baking and Eating Together at Home More or the Same as Two Years Ago.

Activities	Engaging More	the Same	Engaging Less	Don't Participate
Cooking and baking	32%	48%	16%	4%
Shopping online	32%	49%	17%	2%
Eating together at home	29%	52%	15%	4%
Watching sports, movies, and/or TV shows	27%	55%	16%	3%
Playing with kids or pets at home	26%	41%	13%	20%
Spending time on social media, streaming podcasts, online entertainment	26%	50%	20%	5%
Exercising at home	23%	40%	22%	16%
Gardening or yardwork	22%	40%	18%	20%
Playing games or puzzles	22%	47%	21%	10%
Music, arts, crafts, reading, writing, dance	21%	50%	18%	10%
Taking care of others in the home	18%	40%	12%	30%
Entertaining friends and/or extended family at home	16%	43%	30%	11%
Backyard BBQs or family events	16%	43%	26%	15%
Working from home	13%	20%	14%	53%

Q7: Of the hobbies and activities in the home listed below, are you engaging more, less, or the same as two years ago? May 2025 n=6,002

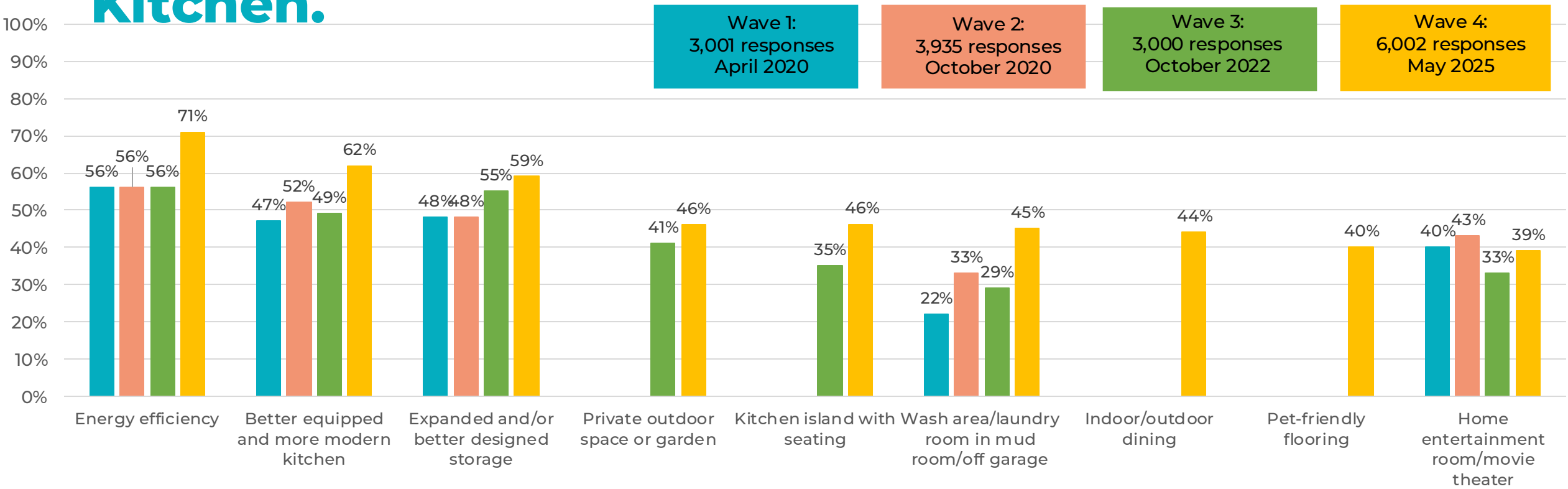


**What's
missing that
you want and
would pay for?**



Features Missing from Home, Most Willing to Pay for – Top Nine

All Top Home Features Most Willing to Pay for have Increased in Importance. Greatest Increase: Energy Efficiency and Better Equipped/Modern Kitchen.

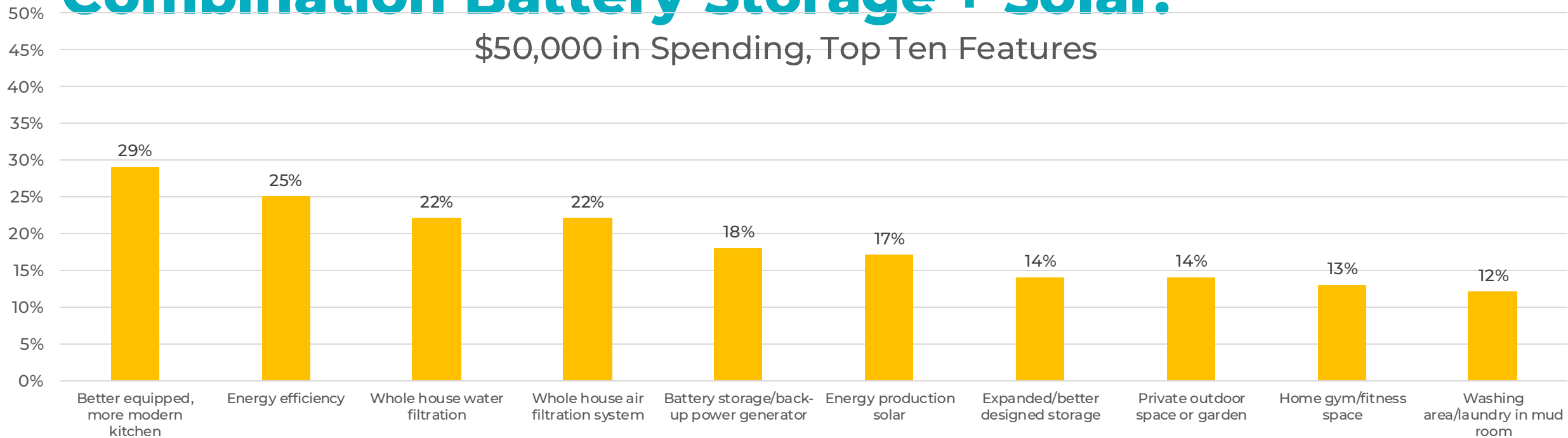


Q13. What is missing that you would like to have and are willing to pay for in your current or next home? These were rated as being “very important.”

If you had \$50,000, what three things would you spend it on? – Top 10

Better Equipped, More Modern Kitchen, Energy Efficiency, Water and Air Filtration, and Combination Battery Storage + Solar.

\$50,000 in Spending, Top Ten Features



Q21: If you had \$50,000 to spend on features and upgrades in your home pick the top three things you would spend that money on. May 2025=6,002.



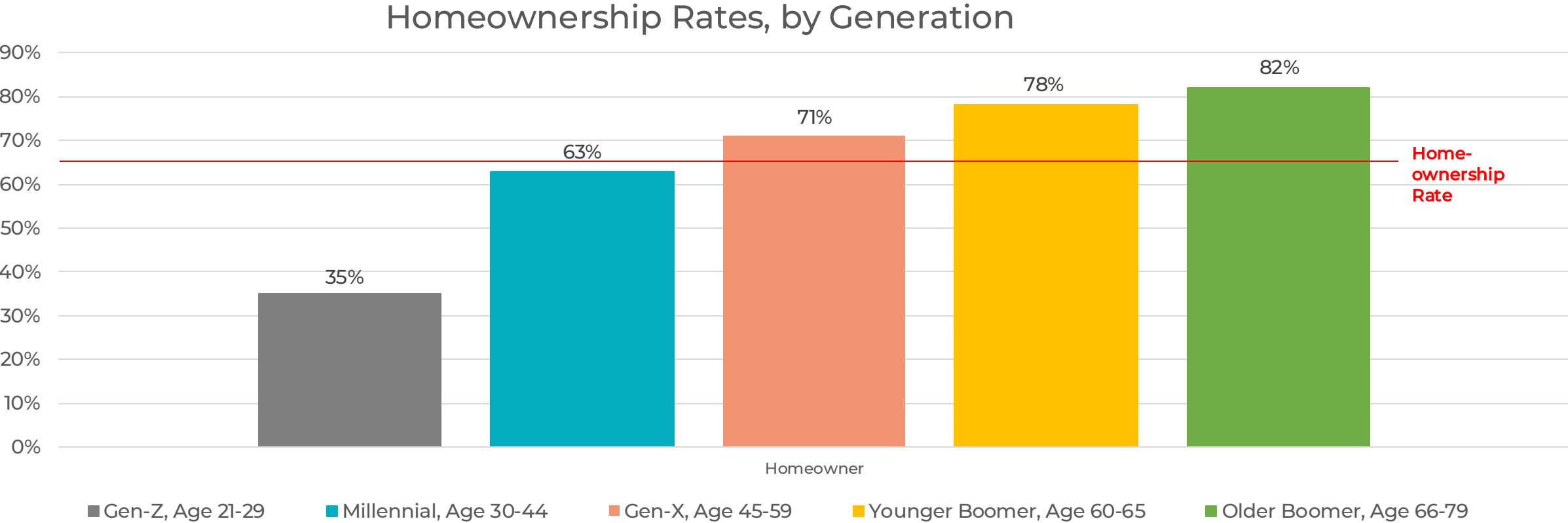
Housing Situation

Homeowners and Homebuyers

May 2025 n= 6,002
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Homeownership Rates, by Generation

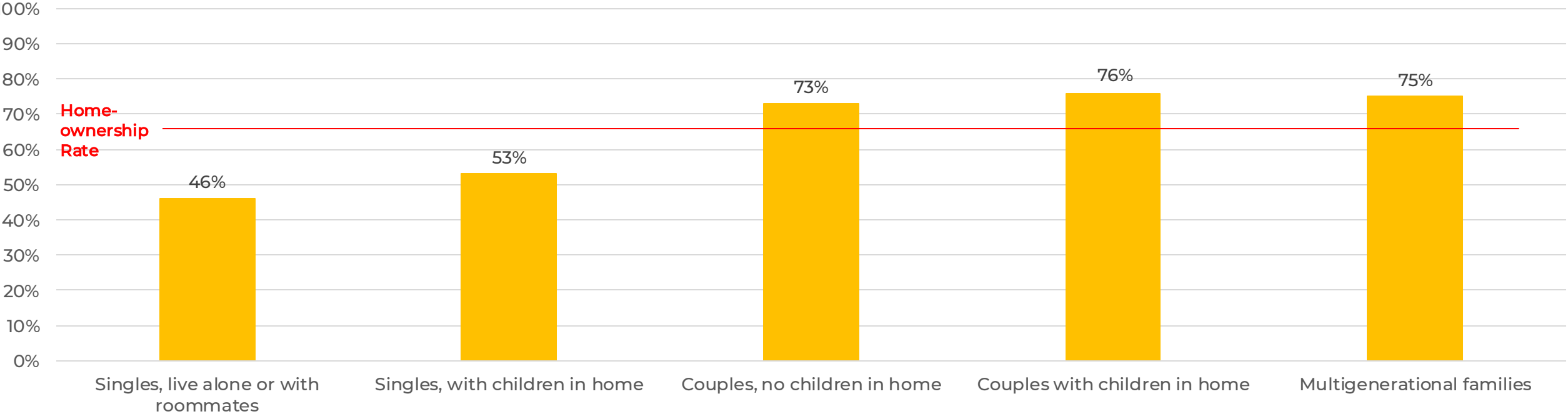
Gen-Z and Millennial have Below Average Homeownership Rates.



QS9: Which of the following best describes your current living situation? May 2025 n=6,002: Gen-Z n=1,043; Millennial n=1,709; Gen-X n=1,636; Boomer n=1,614.

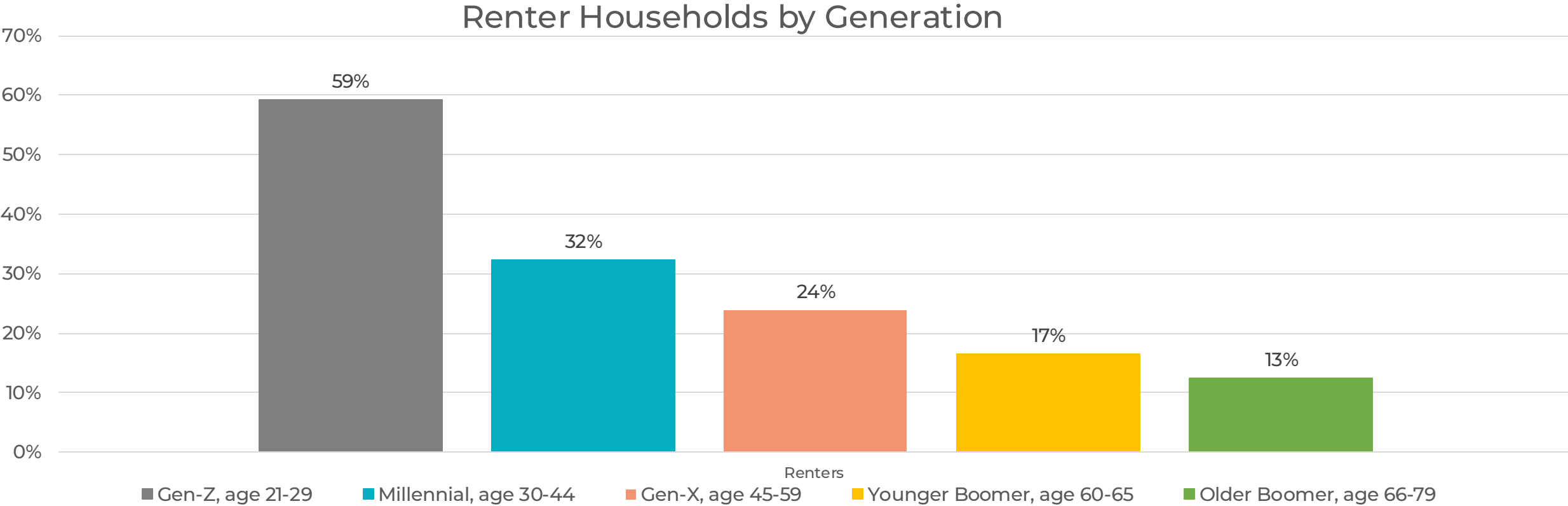
Singles Have Below Average Homeownership Rates

Homeownership Rates by Household Type



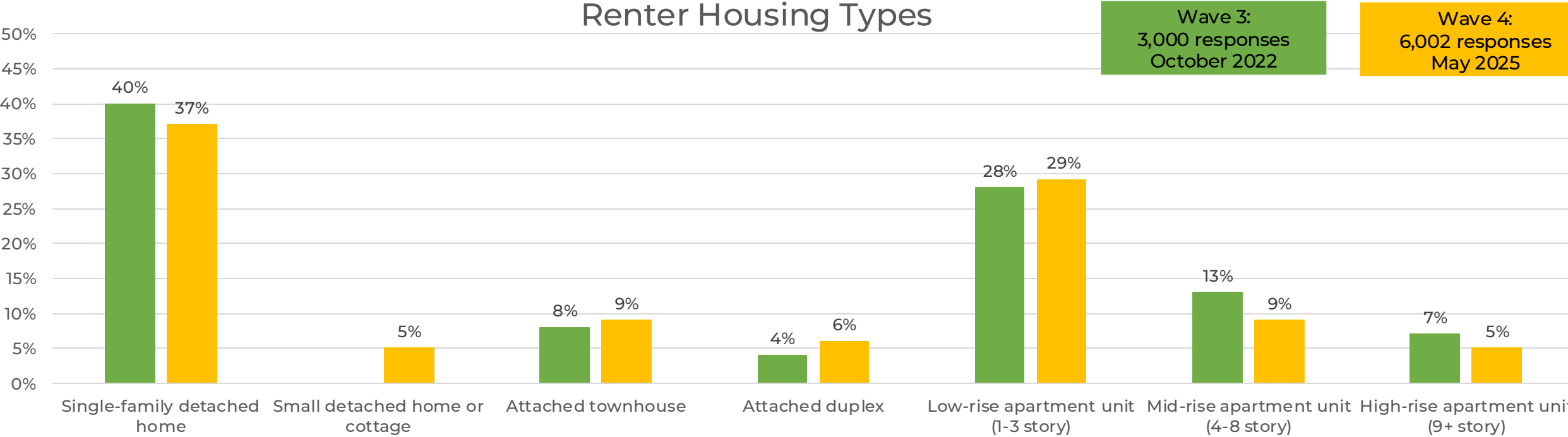
QS9: Which of the following best describes your current living situation? May 2025 n=6,002: Singles, live alone – 843; Singles with children in home = 312; Two or more persons unrelated = 214; Couples, no children in home = 1,831; Couples with children in home = 2,254; and Multigenerational families = 548.

Two-Thirds of Renter Households are Younger, Gen-Z, and Millennial



Total Households May 2025 n=6,002; Renters n=1,790; Gen-Z n=618; Millennial n=554; Gen-X n=391; Boomers n=230.

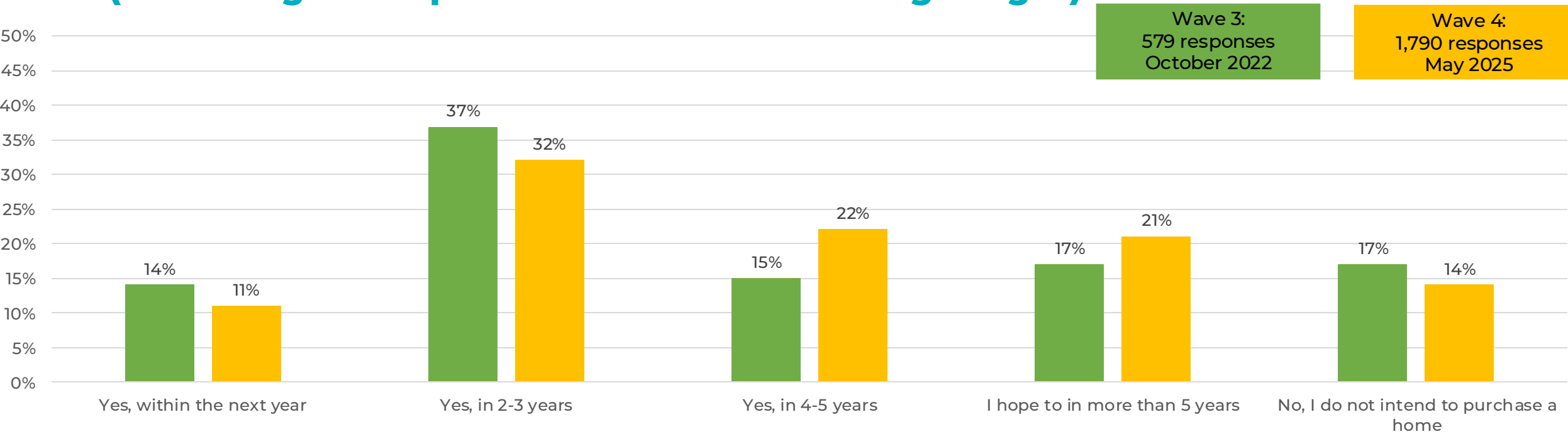
Renters Primarily Reside in Single-Family Homes and Low-Rise (Garden) Apartments



Q9e. Which of the following housing types do you live in or are in the process of renting? Total Renters October 2022 n=579; May 2025 n=1,790.

More Delayed Home Purchase Timeframe Among Renters Compared to 2022.

(2025=Larger Sample Size and Includes Younger Ages)

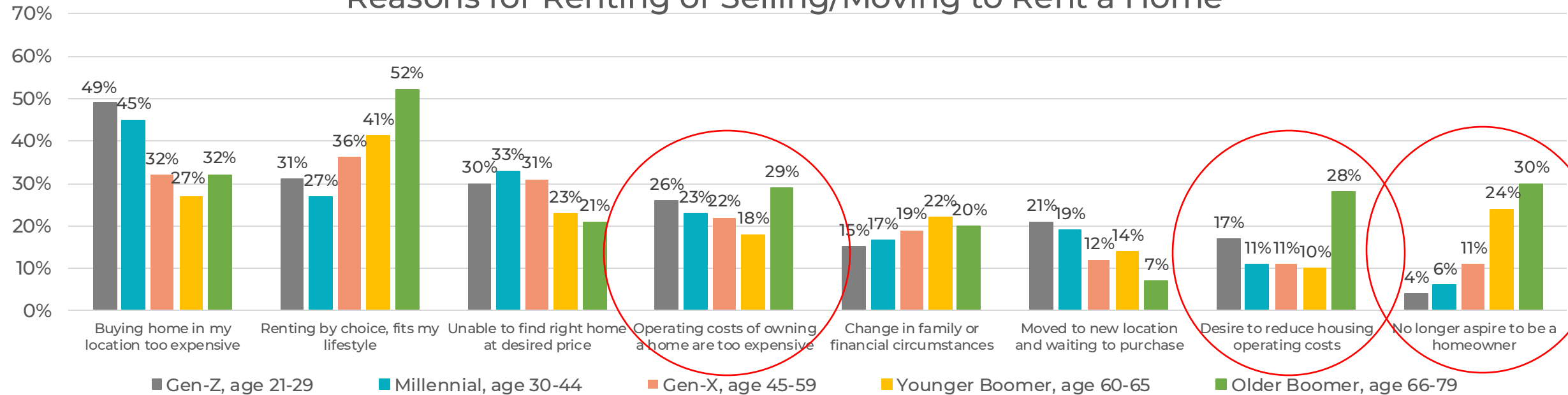


Q9g. Do you intend to purchase a home in the future? Total Renters October 2022 n=579; May 2025 n=1,790.

Reasons for Renting – Some important shifts and insights

For all respondents “renting by choice” is now 33%, up from 24% in Wave 3 in 2022.
9% of people who were owners and are now renters “no longer want to own a home”.
17% who moved to a new location are waiting to buy (up from 9% in Wave 3 in 2022).

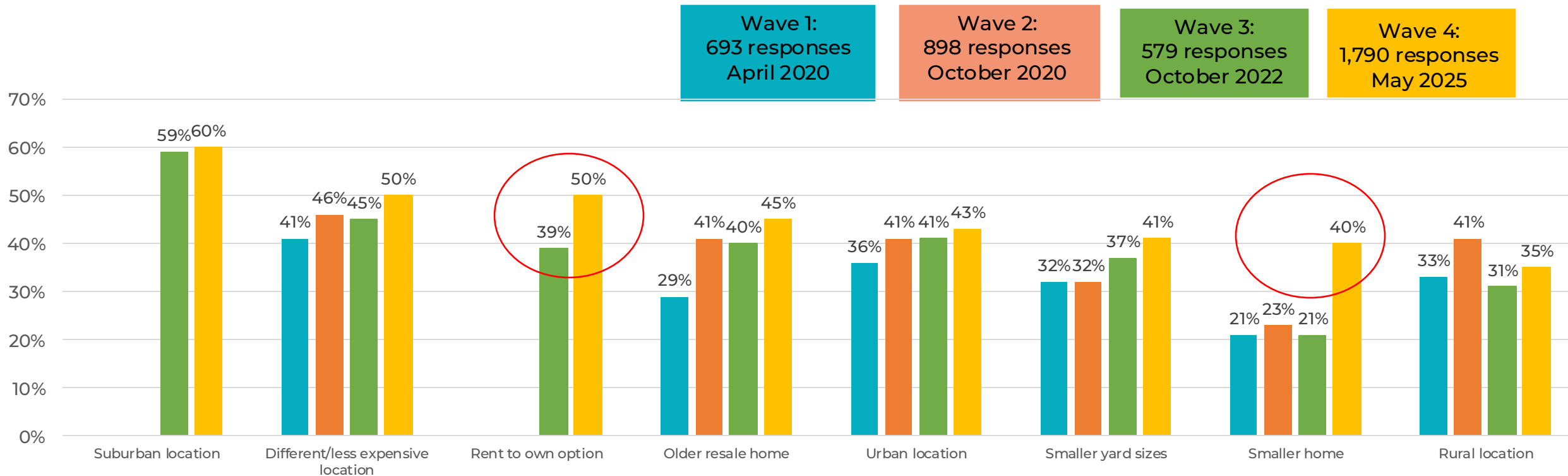
Reasons for Renting or Selling/Moving to Rent a Home



Q9f. What are your reasons for renting? Total Households May 2025 n=6,002; Renters n=1,790; Gen-Z n=618; Millennial n=554; Gen-X n=391; Boomers n=230.

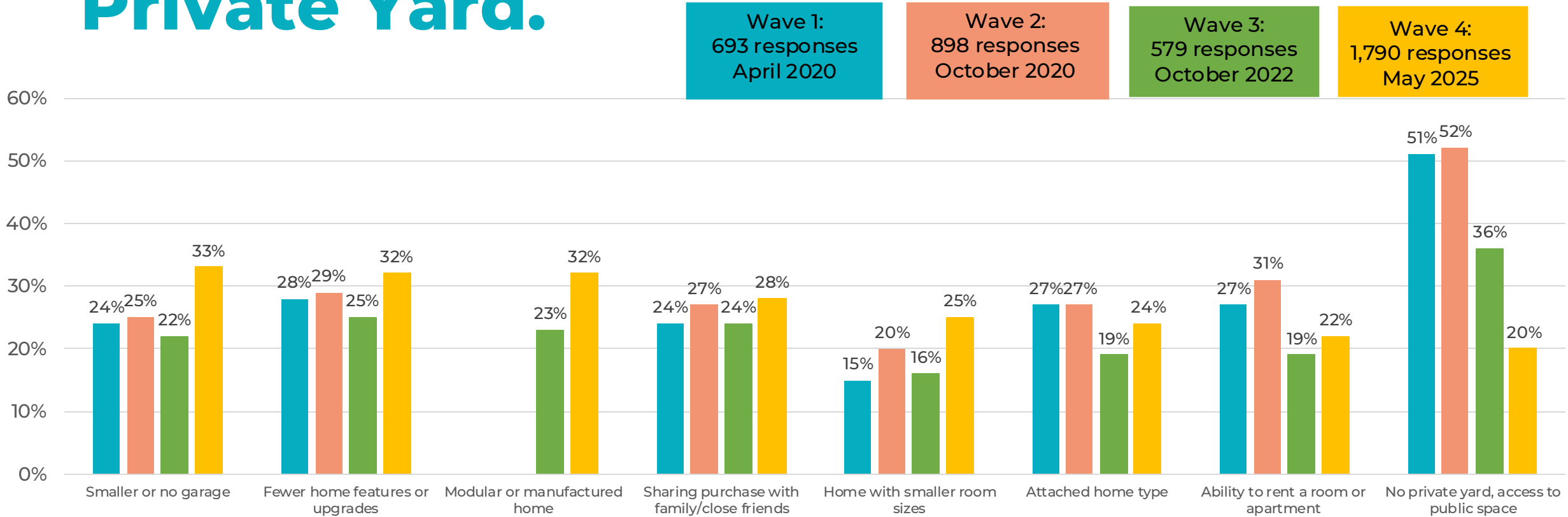
Renter Households Most Important Trade-offs to Increase Ability to Buy

Increases in Smaller than Ideal Home Size, and in Rent to Own Option.



Q9h. To improve your ability to buy a home, what would you be willing to or would not be willing to accept in a home? Renters: April 2020 n=693; October 2020 n=898; October 2022 n=579; May 2025 n=1,790

Increases in All Categories in 2025 Except Willingness to Give Up a Private Yard.



Q9h. To improve your ability to buy a home, what would you be willing to or would not be willing to accept in a home? Renters: April 2020 n=693; October 2020 n=898; October 2022 n=579; May 2025 n=1,790



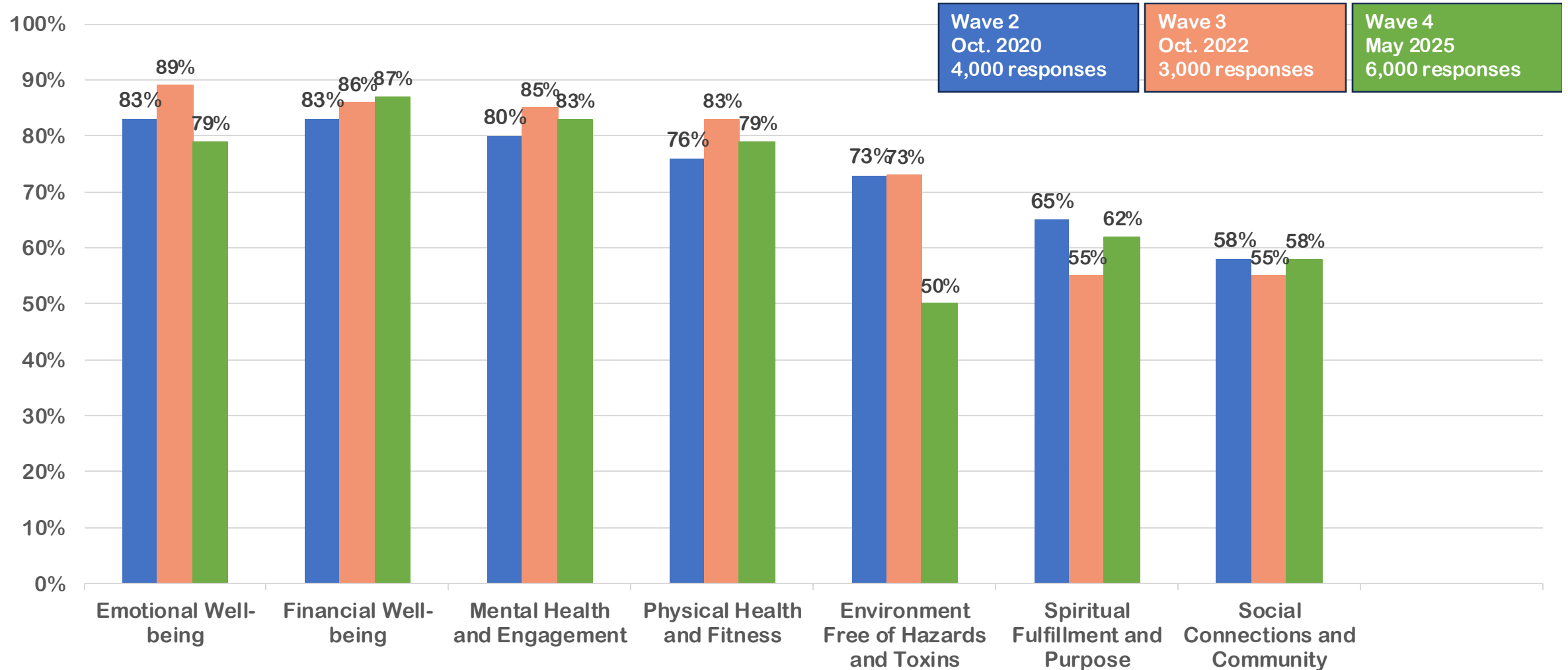
My Health and Wellness

**Definition of Wellness
in Life
+ Level of Personal
Satisfaction**

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Wellness Domains, Very Important/Important in My Life

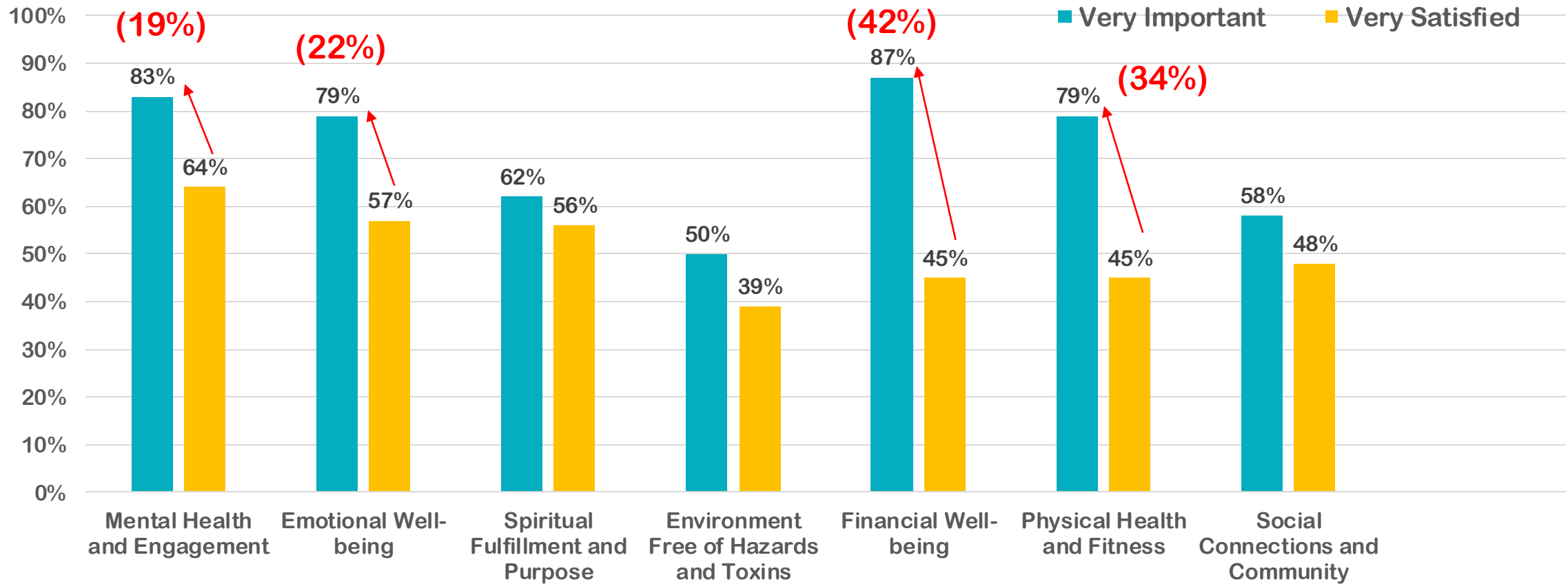
Emotional, Financial, Mental, and Physical Health



Q20. How important is each area of wellness in your life? Responses = 4 or 5 on 1-5 scale.

Wellness: Level of Importance vs. Level of Personal Satisfaction

Biggest Gaps: Financial, Physical, Emotional, Mental.



Q21. For each area of wellness please indicate your level of personal satisfaction of wellness in your life.



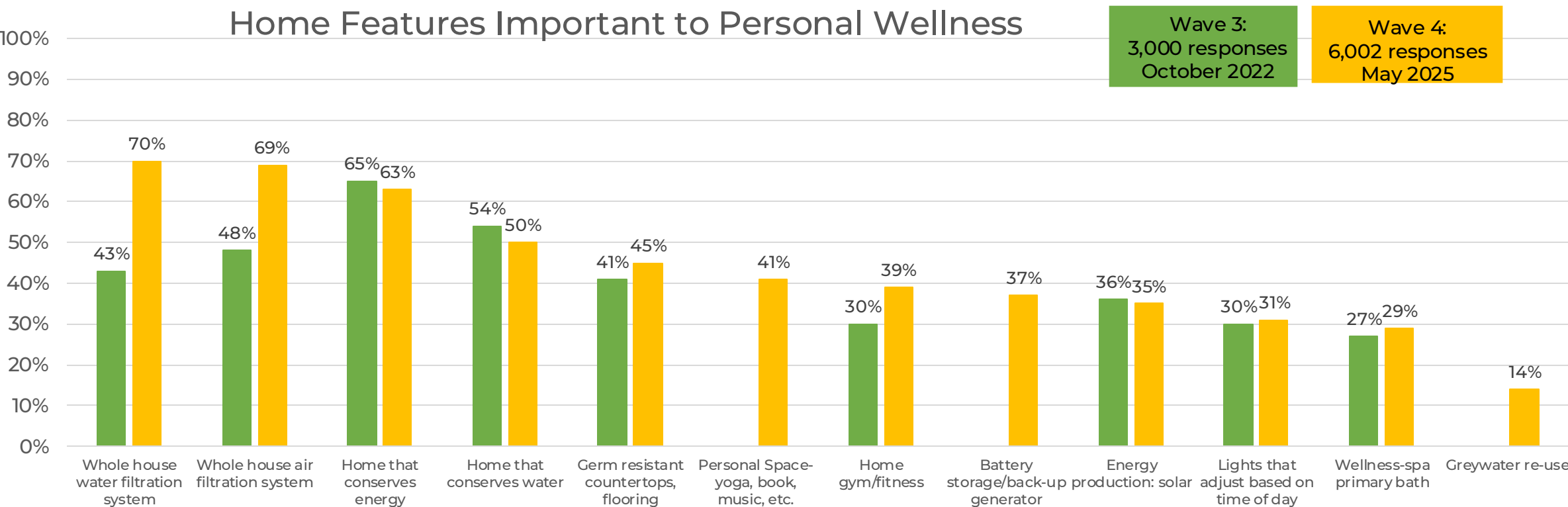
*THERE IS NO
PLACE LIKE
HOME*

How important are the following elements to you in a home?

Home Features Important to Personal Wellness

Most Important and Greatest Increase: Whole House Water and Air Filtration Systems.

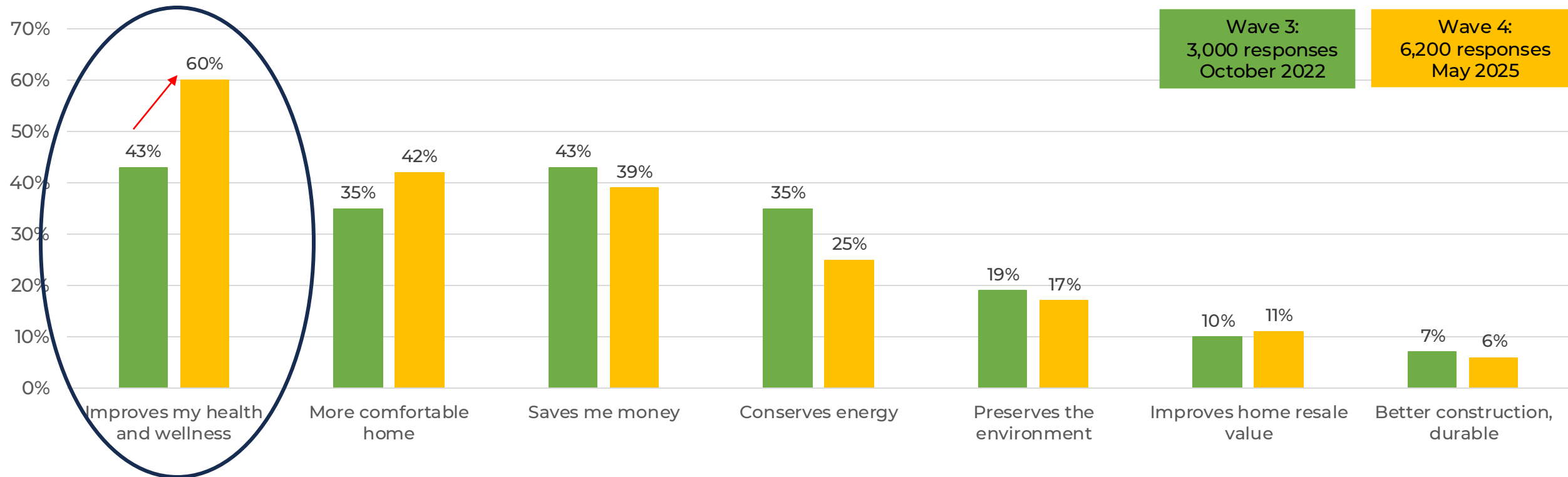
Increase in Wellness Spaces: Personal Space, Home Fitness, and Wellness Spa



Q19. Regarding your home, how important are each of the following attributes to your personal wellness? October 2022 n=3,000; May 2025 n=6,002.

What are your motivations for choosing these things for your home?

Wellness is the #1 purchase-motivator, increasing by 17% since 2022, followed by increase in More Comfortable Home.
More Important than Saving Money or Conserving Energy.



Q20. Please indicate your motivations for your above choices for your home. Please select your top two choices. October 2022 n=3,000; May 2025 n=6,002.



Community Attributes and Amenities

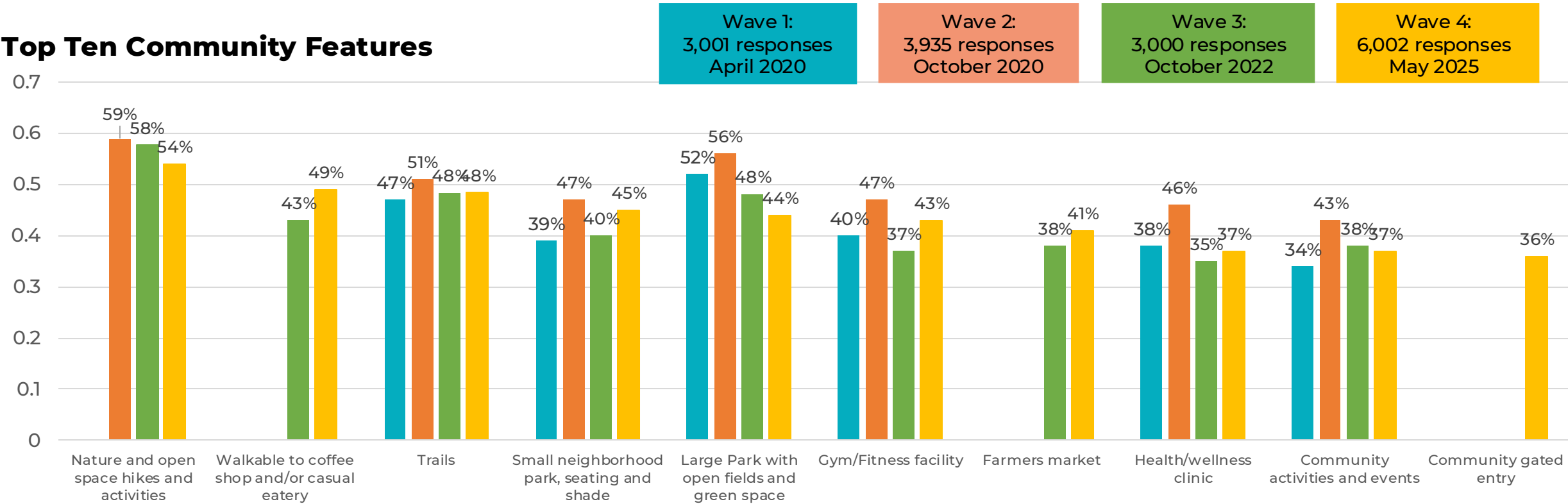
Features That Influence Purchase Decision

May 2025 n=6,002
15,938 total responses 2020-2025

Very Important, Would Influence My Decision About Where to Rent/Buy

Open Space, Coffee Shop/Casual Eatery, Trails and Parks Continue to Have the Greatest Influence.

Top Ten Community Features



Q23. In thinking about buying or renting your next home, what community features would more or less influence your decision. Total April 2020 n=3001; total October 2020 n=3935; total October 2022 n=3000; total May 2025 n=6,002.

Picnic/BBQ, Bike Paths, Outdoor Fitness, and Resort Pool.

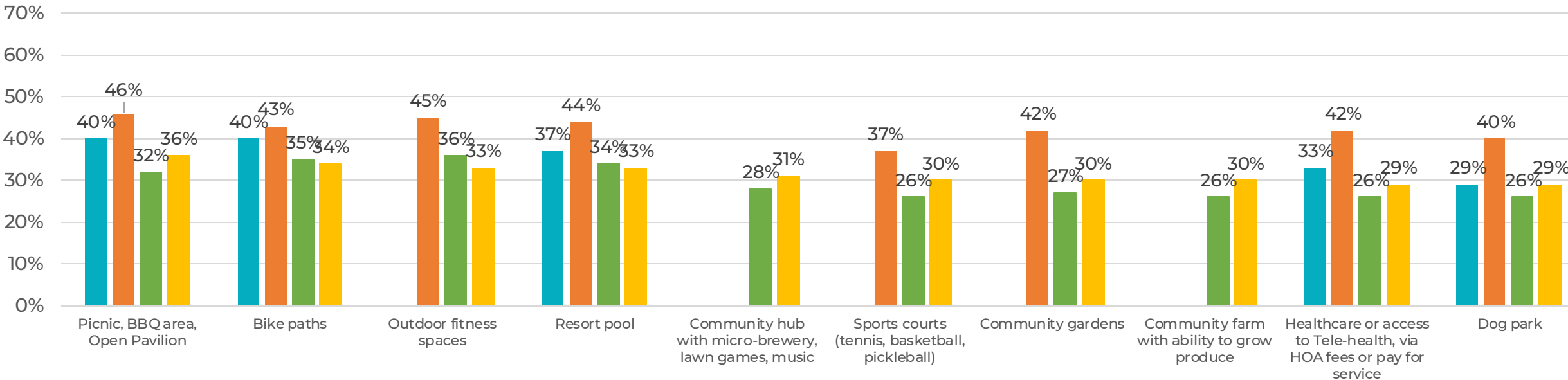
Second Ten (10) Community Features

Wave 1:
3,001 responses
April 2020

Wave 2:
3,935 responses
October 2020

Wave 3:
3,000 responses
October 2022

Wave 4:
6,002 responses
May 2025



Q23. In thinking about buying or renting your next home, what community features would more or less influence your decision. Total April 2020 n=3001; total October 2020 n=3935; total October 2022 n=3000; total May 2025 n=6,002.

These Amenities Appeal to Certain Consumers.

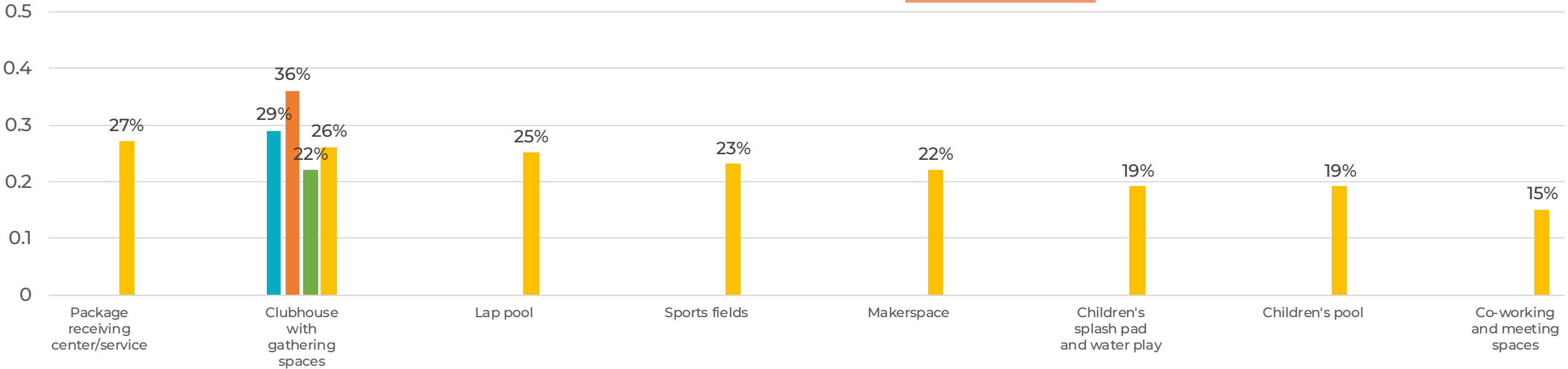
Third Group of (8) Community Features

Wave 1:
3,001 responses
April 2020

Wave 2:
3,935 responses
October 2020

Wave 3:
3,000 responses
October 2022

Wave 4:
6,002 responses
May 2025



Q23. In thinking about buying or renting your next home, what community features would more or less influence your decision. Total April 2020 n=3001; total October 2020 n=3935; total October 2022 n=3000; total May 2025 n=6,002.

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