

# Homes 2025: a national conversation

**UK Concrete and  
Opinium research**



# About our research

UK Concrete commissioned Opinium to conduct an in-depth survey of the public about their attitudes to their homes, how they are built, and what they value in them.

The research conducted in early 2025 surveyed 5,000 homeowners, private and social renters across the UK including residents living in medium to high rise buildings. It aimed to get under the skin of what the public feels about housing.

In a period where many new homes are expected to be delivered, we asked what exactly those that are going to live in them – and ultimately buy and rent them – prioritise. The answers shed light on what it is that people value, and may undermine some preconceptions, indicating what the industry and government should do to ensure that they are creating homes that are fit for the future and actually wanted.

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# Introduction

**The Labour government has put building new homes at the centre of a plan for change designed to boost economic growth and tackle chronic housing need. It aims to deliver the biggest increase in affordable housing in a generation.**

Specifically, ministers have repeatedly committed to building 1.5 million homes across the lifetime of the current parliament, and to that end have already brought forward significant reforms to the planning system.

The target, equivalent to building 300,000 homes a year for five years, would require a sustained uplift of over 35% on the volume of homes built in 2023/24 with the numbers predicted to fall in 2024/25.

300,000 is an annual figure that hasn't been hit since the 1970s, while 1.5 million is 30% above the 1.16 million homes built in the last five years – itself close to a high watermark.

Given scepticism over the target – Barratt Redrow chief executive David Thomas said in December last year it can't be hit – both the deputy prime minister Angela Rayner and prime minister Sir Keir Starmer have recently re-committed the government to the number. Starmer says the homes are a necessary part of Labour's attempt at "rebuilding Britain to deliver for working people", but even ministers accept it will be a huge challenge.

However, the focus on numbers, while undoubtedly welcome for those in housing need, comes with risks. The last period of significant growth in housing supply volume – in the Help to Buy-fuelled market of the 2010s – culminated in significant concerns over housing quality, including at some major housebuilders. It also saw huge concerns over fire safety in the wake of the Grenfell Tower tragedy, with the fall out still rippling today.

The government is now bringing in a new regulatory regime to tackle fire safety, highlighting risks in some MMC build methods, and there is a new ombudsman to deal with consumer redress.

The government is also implementing the Future Homes Standard, which will set energy efficiency standards for new homes to prepare for zero carbon, and which is set to come into force this year. But nevertheless, it is certainly spending comparatively less time talking about what exactly should be built – in favour of a focus on output.

Previous polling evidence suggests that the public is accepting of the idea that the UK is suffering a "housing crisis", with at least seven in 10 supportive of this view. However, polling has also previously suggested that the public is more concerned than policymakers about the quality rather than simply the quantity of what is built.





# Our findings: a snapshot

## The housing issues that matter to people in the UK:

64% 

see **affordability** as the top housing priority for government

15-25% 

of people **do not trust that new build homes** will mitigate **flooding, subsidence, damp and mould**

Only 15% 

of UK homeowners said they would want to **live in a new build home**

Only 13% 

of people are **confident** that the **UK government will deliver its 1.5m homes** during this parliament

87% 

said having the **home constructed from fire resistant materials** was important

Only 14% 

of people **received information about the materials their home is made from** when they moved in

90% 


rated construction of their home from **materials that protect against water ingress** as important

52% 

of respondents would **prioritise** a home being **built with high quality building materials**

68% 

of homeowners have **no plans to retrofit their homes**

Only 26% 

of people are **motivated to retrofit their home to reduce carbon**

68% 

are **unlikely to install a heat pump**

69% 

of respondents **prioritise energy efficiency more now** compared to two years ago

# Part 1 'It's the money, stupid...'

**For many people, buying a house is the biggest financial investment of their lives. Homes in England were worth an average of 8.6 times a median income in 2023, according to official data.**

For those renting, housing costs will likely be their largest single outgoing, with median private rents on average costing just over a third of median income, according to the latest official data (March 2023, ONS). Given this extraordinary financial investment in shelter, it should not be a surprise that this research shows that across many question topics, respondents' highest priorities when it comes to housing are financial: keeping housing affordable, and reducing the risks of expensive problems.

The survey found that when asked what the government and industry's priorities for new housing should be, the top response was "affordability", with 64% putting that answer. This came ahead of any concerns about quality, safety or sustainability.

The ongoing cost of living crisis has clearly only put financial considerations further up the agenda. The last parliament, from December 2019 to July 2024 was the worst for living standards since the 1950s, with household disposable income falling by around 0.6% after consumer prices soared by over 20% in the wake of Russia's invasion of Ukraine.

***64% of respondents chose "affordability" when asked what the government and industry's priorities for new housing should be***



# Part 1 'It's the money, stupid...

## Home energy efficiency is an increasing priority

The vast majority of respondents to our research said both that the cost of living crisis had made them more aware of how energy efficient their current home was (69%), and that they would prioritise energy efficiency more now compared to two years ago, due to the rising cost of living (70%).

In this context, residents appear to be prioritising keeping utility bills down. While energy prices have now fallen since the peaks experienced in the immediate aftermath of Russia's invasion of Ukraine, the price cap set by the regulator remains at the time of writing around 30% higher than the level seen in winter 2021/22.

**69% of respondents said that they would prioritise energy efficiency more now compared to two years ago**

Asked what construction-related features they would prioritise when moving house, the top response from research respondents was a home with "well insulated walls, windows, doors, and roofing" (66%).

Likewise, the two most common improvements that survey respondents were willing to pay to install in their homes were heat insulation (35%), and draft exclusion (28%) – both of which will make homes cheaper to heat to a comfortable temperature.

Top responses to the question of what people prioritise when moving house could also be seen as factors which reduce the risk of incurring additional expenses.

While insulation is by far the top priority, equal second place goes to two issues around the structural integrity of the house, namely a home having no signs of previous structural issues; and one with solid foundations and structural integrity - both of which features were prioritised by 56% of respondents. In addition, 52% of respondents said they would prioritise a home being built with high quality building materials.



**52% of respondents said they would prioritise a home being built with high quality building materials.**



## Part 2 Hierarchy of needs

**While those polled appeared to put financial issues at the top of their list overall, in terms of the construction of their homes they prioritised keeping warm, dry, safe and healthy.**



As in the hierarchy of needs depicted by the psychologist Maslow, the responses showed that “basic” needs such as for warmth and shelter were viewed as most vital, with safety and health still very important but not quite as critical, and with other issues lower down the pecking order.

Hence, as noted in Part 1 above, when asked what construction-related features they would prioritise when moving house, the top response from research respondents, given by 66%, was a home with “well insulated walls, windows, doors, and roofing” which would keep them warm.

Allied to that, the biggest reasons for respondents to be unhappy with their current homes were around either heating or cooling costs (such as poor insulation or ventilation), cited by 40% of those respondents who were unhappy, or damp or mould growth, cited by 41%. This compares to factors which might normally be assumed to be at the heart of buying decisions, such as “poor location” or access to local amenities and services, cited by just 13% and 6% respectively.

### **Water and damp and mould top resident concerns**

The fear that homes don’t adequately protect residents from the various impacts of water is very high up the list. Asked what they most feared happening to their current home, a quarter of respondents said “leaks or escape of water”, the third highest concern. The biggest concern, however, echoed across other questions, was around damp and/or mould, cited by 32%. Damp and mould was also the third most popular answer to how respondents would improve their current homes, cited by 27% - with a salience above issues such as overheating (11%).

This focus on damp and mould may have increased in recent years in the wake of the death of toddler Awaab Ishak, who a coroner ruled died from the effects of damp and mould in his local authority-owned flat in December 2020. Since then, social housing landlords have faced new duties to report on and tackle damp and mould, but enforcement remains patchy in rented housing, while none exists in the owner-occupied sector.





## Part 2 Hierarchy of needs

### Homeowners and renters understand the importance of fire-resistant materials

Fire safety was found to be a significant issue. Overall, 87% of respondents said having the home constructed from fire resistant materials was an important or very important safety measure – coming behind only protection from leaks and protection from mould and damp in salience to residents.

The findings come at a time when Government is seeking to build more homes with combustible timber.

Since the Grenfell Tower fire in 2017, the role of flammable building materials, often used in insulation and cladding, has been widely discussed, resulting in changes to building regulations. It has also left residents in high-rise homes no longer viewed as fire safe with serious problems, with many left unable to sell their properties until remediation works are completed.

In the research, 53% of respondents said they were aware of the fire safety of their home's building materials when they moved in, well above the number that claimed knowledge around issues such as sound insulation and carbon footprint, and 21% said they feared fire damage to their home – the fourth most cited fear. This fear rose to 29% in residents of buildings above seven stories.

**Figure 1. Awareness and concerns about fire safety in homes**

*Importance of fire-resistant materials as a safety measure*

**87%**

*Awareness of the fire safety of building materials*

**53%**

While fire safety is clearly very important to respondents, the disconnect between concern about fire safety and awareness of the fire safety of materials, suggests that the construction industry is not providing people with enough information about the latter.





## Part 3 Sustainability begins at home

The government is on course to increase the sustainability standards to which new homes have to be built, with the introduction of the Future Homes Standard (FHS), currently due this year.

The FHS is designed to make new homes “net zero-ready”, requiring them to be built to very high fabric efficiency standards, with heating and hot water provided by electricity.

### Cost, safety and comfort issues outweigh sustainability

The responses to our research suggested that sustainability is of importance to residents, but with sustainability issues scoring lower on certain metrics, it appears it is as an issue overall lower down the priority list than the financial, safety and comfort issues listed in [Parts 1](#) and [2](#).

In general, the findings appear to indicate that residents view sustainability primarily through the lens of energy efficiency and its consequent ability to reduce energy costs.



As identified in Part 1, insulation is therefore a very big priority, for example coming top of a list of measures which respondents would be willing to pay to install in their home.

But in contrast, responses to questions which refer to “altruistic” sustainability issues that would potentially benefit the wider environment appear to show a lower priority given by respondents.

**residents view sustainability primarily through the lens of energy efficiency and its consequent ability to reduce energy costs**

To give an example, 55% of respondents said they were aware of the energy efficiency of their home when they moved in – just above the 53% that claimed awareness of fire safety of their building materials – indicating a relatively high level of awareness. However, just 23% said they were aware of the carbon footprint of the building materials used in their building.

Likewise, when asking what features they would look for in a new property if they were to move, the top answer, given by 66% of respondents was “well insulated walls, windows, doors, and roofing”, which could indicate both a desire for reduced energy bills and an interest in sustainability.

In contrast, the option in the same question for specifically environmentally conscious measures, described as “eco-friendly / energy efficient construction features (such as solar panels or heat pumps)” was ticked by just 37% of respondents. Even fewer, just 26% of respondents, answered that they would prioritise a home built with “environmentally friendly materials”.

## Part 3 Sustainability begins at home

A similar pattern was in evidence when respondents were asked what is important to them in choosing where to live. In joint second place, 38% of respondents said that “low energy consumption (such as insulation, double glazing)” was important, while, in contrast just 11% said that “an area with climate resilience built-in (such as sustainable urban drainage, flood protection)” was important.

In addition, the vast majority of respondents that indicated they had plans to retrofit their homes said they were doing it either to make “energy savings” (69%), compared to just 26% who said they were motivated by a “reduced carbon footprint”.

None of this means that those surveyed don’t care about environmental issues – more that sustainability issues were less likely than other issues to reach the threshold necessary to influence their housing choices.

When asked to rate their view on a series of statements around energy efficiency and sustainability measures, on most metrics the survey found that between 60% and 80% responded favourably to sustainability. These statements included that they would “prefer their homes to be built in a way that protects from future climate impacts”, or to be “built with materials with a smaller carbon footprint”, with most in support of these.

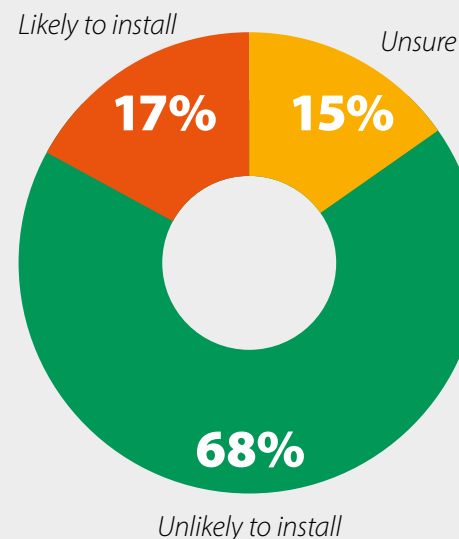
Notwithstanding this broad positivity, the research detected resistance among a significant proportion of respondents to the installation of heat pumps.

Under the government’s existing proposals, new homes will be required to be installed with electricity-powered heat pumps instead of gas boilers when the FHS is brought in.

But when asked to rate their view on a series of statements around energy efficiency and sustainability measures, the one exception where no positive majority was found was the statement on heat pumps, which said “new build homes should be built with heat pumps installed”.



**Figure 2. Homeowner likelihood of installing heat pumps**



Just 48% agreed with this statement, with a significant minority (16%) disagreeing or strongly disagreeing. In the other comparable categories, almost all of those that hadn’t agreed had said “neither agree nor disagree”, with few actively opposing sustainability moves.

Furthermore, asked if they were likely to install a heat pump in the next five years, the homeowners among the respondents overwhelmingly replied in the negative. Just 17% said it was likely, while over two-thirds (68%) said it was unlikely they would install a heat pump.



## Part 4 Material world

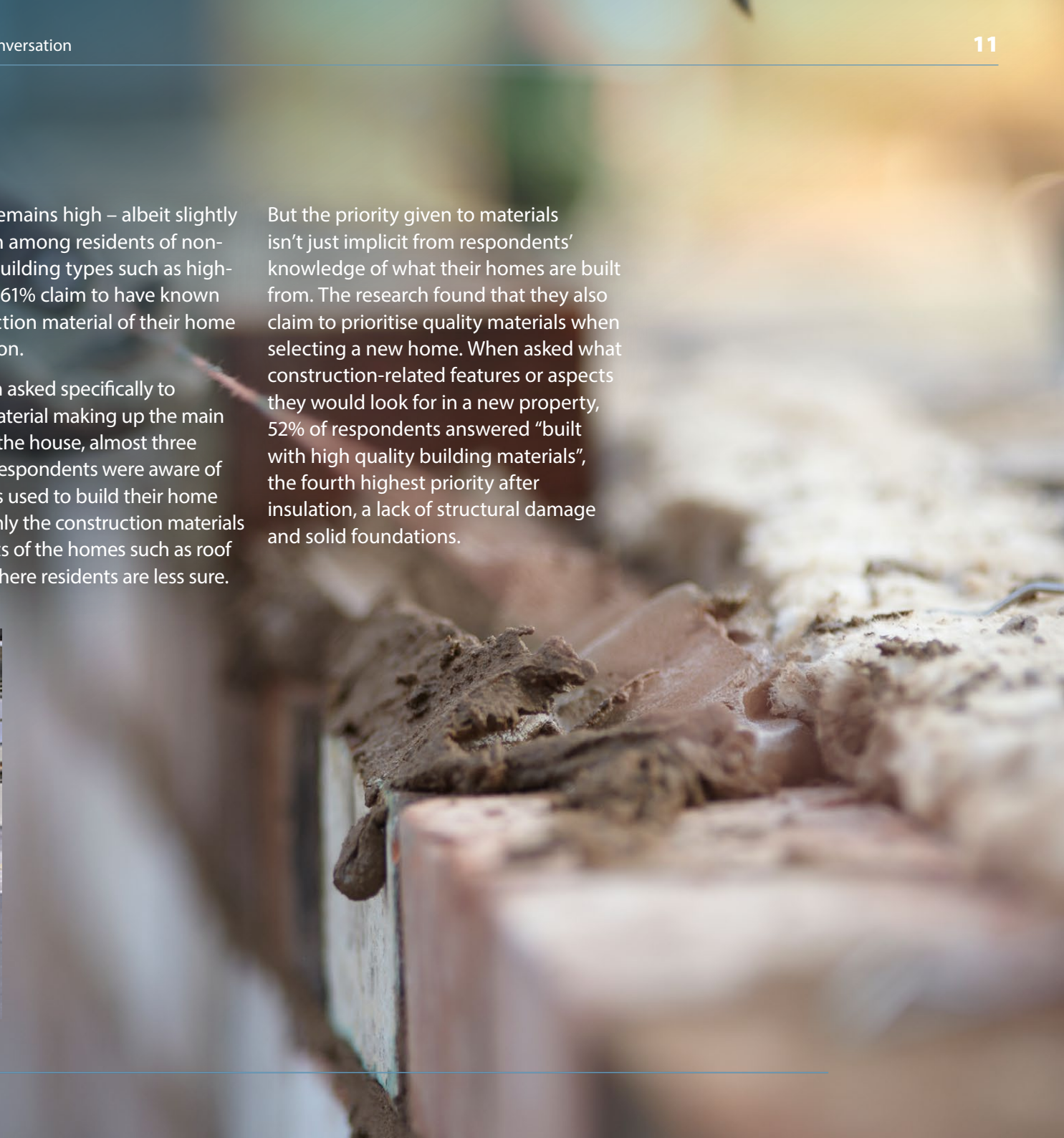
**The UK Concrete survey shows that residents put a high value on the building materials that make up their homes.**

Despite just 14% saying that they received information about the materials their home is made from at the point they moved in, a large majority, 73% say they were aware of the materials it was constructed from when they moved in.

This figure remains high – albeit slightly lower – even among residents of non-traditional building types such as high-rises, where 61% claim to have known the construction material of their home on occupation.

In fact, when asked specifically to name the material making up the main structure of the house, almost three quarters of respondents were aware of the materials used to build their home (73%). It is only the construction materials of other parts of the homes such as roof structures where residents are less sure.

But the priority given to materials isn't just implicit from respondents' knowledge of what their homes are built from. The research found that they also claim to prioritise quality materials when selecting a new home. When asked what construction-related features or aspects they would look for in a new property, 52% of respondents answered "built with high quality building materials", the fourth highest priority after insulation, a lack of structural damage and solid foundations.





## Part 4 Material world

### Build quality should be an industry and government priority

In addition, respondents said that a closely related issue – build quality – should be right at the top of the government’s agenda when planning out the homes being built over the next five years. With 63% of respondents identifying this issue, it was second only to affordability in this question.

The research also gave some pointers as to residents’ definition of quality in relation to building materials. While the answers showed a clear preference for sustainable building materials, again the answers indicated that other issues would take precedence over sustainability.

Responding to the question about new build homes over the next five years, 30% said the use of sustainable materials should be an “important consideration” for government and industry, the sixth most common answer. Furthermore, 64% of respondents said they would “prefer” that new homes to be built from materials with a smaller carbon footprint, and 61% said the same about using local construction materials from the UK.

However, these numbers aren’t anywhere near as high as the numbers that rate as important the construction of their home being from either fire-resistant materials (87%) or materials that protect against water ingress (such as leaks and damp) (90%).

**63% of people said build quality should be right at the top of the government’s agenda when planning out the homes being built over the next five years**



And sustainability of materials did not appear to be decisive for most in choosing a new home. Just 26% responded that finding a home built with environmentally friendly materials was part of what they would look for in a new property.

The data on locally-sourced materials was mixed. While (as per above) 61% expressed a preference for using local construction materials, again this did not appear to widely influence market behaviour.

**90% of people rated construction of their home from materials that protect against water ingress (such as leaks and damp) as important**

**87% of people rated construction of their home from fire-resistant materials as important**



## Part 5 Differing views: renters and homeowners

Beyond the findings across the cohort, the research also revealed significant differences in the responses to certain issues from certain groups of respondents. For example, renters are twice as likely to be unsatisfied with their home (20%) compared to homeowners (7%).



Renters also appear to know least about their homes, with just 17% claiming knowledge of what materials they were made of when they moved in, compared to two-fifths of homeowners.

Unsurprisingly, perhaps, given homeowners' responsibility for looking after their properties, homeowners also prioritise materials and construction quality more highly than renters.

The research found that when looking for a new home, 55% of homeowners' would look for a property to be built with high quality building materials, compared to 45% of renters. In addition, 60% of homeowners look out for solid foundations and structural integrity vs 49% of renters.

Some of the starkest differences were identified around the issue of fire safety, as mentioned in Part 2. Hence, among those who said they were dissatisfied with their current housing, nearly two-fifths of high-rise residents above seven stories said it was fire risk or inadequate fire safety that prompting that feeling (38%). This compared to an overall of 6% saying the same.

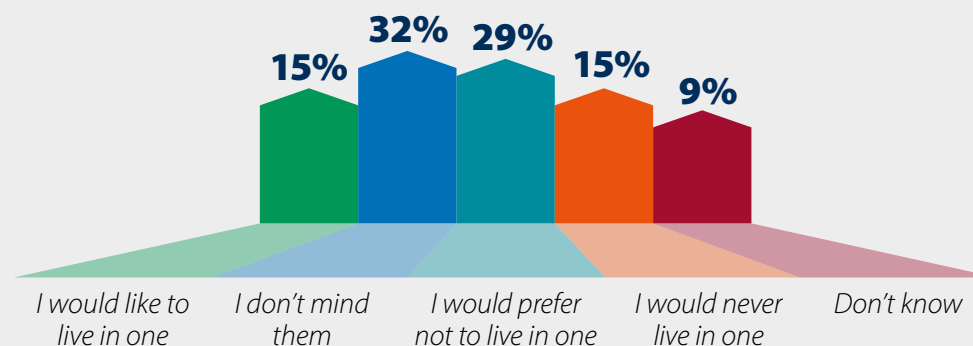
### Fire resistant materials are important to homeowners and renters

Asked how important the construction of their home from fire resistant materials was, 95% of residents in buildings above seven stories said it was very or somewhat important, as did 85% in either terraced or semi-detached houses. Nearly three in ten of those living in buildings higher than seven stories (29%) said they feared fire damage to their home.

First time buyers – defined as renters looking to buy their first home within the next three years – also had distinct views. Specifically, the first time buyer cohort had notably more positive views on new build homes than most of the other groupings.

While just 15% of UK homeowners said they would want to live in a new build home, 43% of first time buyers said they would like to live in one. Only those living in high-rise homes above seven stories were more positive about new build housing, with 63% favourable, compared to an overall average of 19%.

Figure 3. Homeowner's attitudes towards new build homes



## Part 6 Delivery scepticism

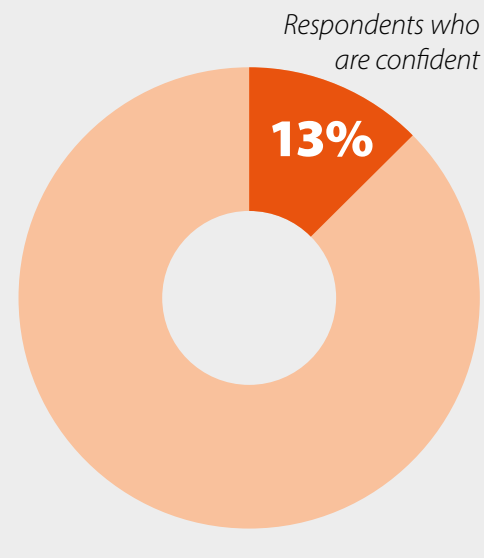
The research revealed some distinct scepticism from the public about the capability of both industry and government to deliver against the housing crisis in certain respects.

Most notably, the government's target to build 1.5 million homes over the course of the current parliament was not seen as credible by a significant majority of respondents, with just 13% expressing confidence the target will be hit. In contrast, almost three fifths (59%) of respondents said they were not confident the target will be made.

Asked why, those that said they did not believe the target would be hit most commonly said the failure would be down to a lack of funding (66%) and a lack of infrastructure such as roads and reservoirs (56%). A lack of planning and limited capacity were also deemed to be significant factors, both mentioned by 48% of respondents. Only a limited number (26%) thought that construction materials would be a constraint.



**Figure 4. Confidence in government's housing target**



### Industry must rebuild public trust in housing

The responses to the research appeared to show that in the wake of the Grenfell tragedy and other concerns previously identified around the build quality of new homes, the industry still has work to do in rebuilding trust.

The research also asked whether residents trusted that a newly built home would have considered and limited the impacts of a series of important risks.

*...in the wake of the Grenfell tragedy and other concerns previously identified around the build quality of new homes, the industry still has work to do in rebuilding trust*

In only one of the risk categories – structural damage – did the research find that more than three in five respondents trusted that a newly built home would have considered and limited the impact of the risk, with 62% trusting that this would have been done.

In the worst performing category, theft and break in, less than half of respondents (48%) said they trusted that the risk would have been considered and limited.



## Part 6 Delivery scepticism

In all of the rest of the categories, which covered issues including flood damage, subsidence, damp and mould and construction material safety, between 50-60% of respondents said they would trust the issue had been considered and mitigated. Commonly between 15-25% of respondents said they “do not trust at all” that these risks had been dealt with.

The research also exposed some of the challenges facing the UK as it looks to retrofit the nation’s 29 million existing homes in order to meet zero carbon targets.

The Climate Change Committee has said that 500,000 homes need to be being retrofitted every year to keep on track with net zero goals, rising to one million per annum by 2030, given the lack of progress made in improving energy efficiency since 2010.

However, while 18% of survey respondents said they had carried out retrofit works designed to improve the energy efficiency of their homes, and 14% said they planned to, over two-thirds said they had no plans to do so (68%).

As described in Part 3, for those who were planning a makeover, the prime motivating factor, cited by 69%, was generating energy savings. Lesser factors, cited by 47% and 45% respectively, were adding renewable energy sources and increased comfort. A desire to reduce carbon footprint was a much smaller motivator, cited by just 26% of residents surveyed.

Residents were also asked about the government’s plans for a generation of New Towns. The government has committed to building a series of new towns of at least 10,000 people – and in some cases many more – as part of its plans to solve the chronic housing crisis and spark economic recovery, with more than 100 bids having come forward.

***500,000 homes need to be being retrofitted every year to keep on track with net zero goals***

The government has said it will prioritise high density development around transport links and look to build in sustainability and social infrastructure such as schools and hospitals.

However, the public priorities for new towns suggested by our research indicate some of the difficulties the government and private promoters are likely to face bringing projects forward, given the likely costs and constraints implied.

Asked what factors the government should prioritise for new towns, the most popular response by some distance was “service capacity such as schools, GPs” (59%), followed by “affordability” (49%). The third most popular response was “conservation of greenbelts/green spaces around cities” (44%), a view which would tend to limit the ability to build new towns in some of the areas they are likely to be most needed.

**Figure 5. Respondent’s plans for home retrofits**

