



Raising the roof: Homes and communities in a post-covid UK

Research from Marley





INTRODUCTION

2020 was a year like no other - impacting profoundly on the way people live their lives.

Homeowners and tenants were forced to spend more time at home. The home became a workspace, school, gym, and replacement for hospitality. And for many, more time at home meant more time experiencing their local community and what it has to offer them in terms of quality of life, amenities, and infrastructure.

The changes experienced in the last 12 months have been the focus of various debates from 'polo mint' economies/communities, revivals of local high streets and even discussions around the '15-minute city' where everything is within 15 minutes of residents' homes. There have been reports of people moving from urban areas into the suburbs or even into rural locations, motivated by changes to their personal situations and working lives and rooted in individual aspiration about how and where they want to live. COVID has had a big impact on the way people live and what they want and look for in their communities.

So, how do architects, specifiers, housebuilders, landlords, and social housing providers respond to what could be several emerging long-term trends accelerated by the pandemic, and balance the ongoing challenges of providing quality, affordable housing that plays its role in achieving the nation's sustainability targets?

Answering this question is important as the sector strives to deliver acceptable and sustainable housing and community solutions against the backdrop of increased regulatory demands, enshrined within the Future Homes Standard, as set out in the significant changes to Part L and Part F of the Building Regulations.

With the reduction of UK emissions by 78% by 2035 compared to 1990 levels set in law, actions need to be taken to achieve this goal across industry. And it's clear the Government has identified the nation's housing stock as an enabler of this change. It is seeking better energy reduction performance from homes and communities and views the nation's housing portfolio as a key element to drive sustainable living standards, promote greener living spaces, and deliver energy efficiency wins for the long-term. While some Government initiatives such as the Green Homes Grant Scheme have been scrapped for homeowners, the finance is being rerouted to support local authorities improve social housing stock.

In addition, the recent publication of the Social Housing White Paper, which provides a charter for social housing tenants that sets out seven key commitments they can expect from their landlords, adds another layer of regulatory oversight.

Against the backdrop of these regulations, initiatives, and guidance, and to try to unpick how the COVID experience has affected the views and behaviours of homeowners and tenants and how they assess their living spaces and their wider communities, Marley has commissioned independent research. The findings shared here capture insight from 2,000 adults consisting of homeowners, private and social housing tenants alongside some commentary from the architectural community.

We hope you find this report of interest.





SECTION 1:
HOME
IMPROVEMENTS
AND PRIORITIES FOR
THE HOME



KEY FINDINGS

For a significant proportion of private and social housing tenants, the quality of their property is key. They want greater priority given to better standards, for example, no damp and high-quality building elements such as the roof.

One in four homeowners believe they can add value to properties if they invest in home improvement. In addition, as the pandemic restrictions meant many working from home, this has created issues about workspace and living space confusion and a wish to see more of a separation.

While easier to achieve, general decoration has been popular with more long-term projects around gardens, kitchens and bathrooms being undertaken, as well as future proofing homes with the increased installation of smart home technologies. For nearly one fifth of homeowners, roofing work has been an area of focus and more than one in ten have invested in an extension, showing that work to the building envelope is also being completed as homeowners seek to improve their properties.

Between a fifth and a quarter of all tenants are now looking to move because of their experiences in the past year, which points to volatility and perhaps dissatisfaction in the rental sector that landlords need to be mindful of. However, a quarter of homeowners still want to improve their properties further, perhaps encouraged by a new appreciation of their living spaces due to the health crisis and associated impact on everyday life.

What's important...

- 49% of private tenants and 55% of social housing tenants want priority given to better standards with expectation for no damp
- 46% of private tenants and 48% of social housing tenants are seeking high quality buildings in which to live such as the building fabric and the roof

Home improvements...

- 62% of homeowners, 48% of private tenants, and 32% of social housing tenants have undertaken some form of home improvement in the last year
- 24% of homeowners, 15% of private tenants, and 19% of social housing tenants were motivated to create a better use of the space they have
- 58% of homeowners, 50% of private tenants, and 54% of social housing tenants were seeking a 'general' improvement to their living spaces
- 25% of homeowners were looking to add value to the property
- 9% of homeowners, 10% of private tenants, and 8% of social housing tenants wanted to separate home from work
- The favoured areas of home improvement have been:
 - Decoration: homeowners (44%), private tenants (27%), social housing tenants (32%)
 - Landscaping: homeowners (30%), private tenants (10%), social housing tenants (13%)
 - Kitchen: homeowners (29%), private tenants (19%), social housing tenants (30%)
 - Bathroom: homeowners (27%), private tenants (28%), social housing tenants (27%)
 - Roof: homeowners (17%), private tenants (19%), social housing tenants (13%)
 - Extension: homeowners (12%), private tenants (8%), social housing tenants (8%)
 - Smart tech: homeowners (12%), private tenants (11%), social housing tenants (12%)

Attitudes towards home...

- 24% of homeowners, 16% of private tenants, and 17% of social housing tenants say their attitude to want to improve their homes or make further changes has strengthened over the past year
- 21% of homeowners, 15% of private tenants, and 9% of social housing tenants value their homes more than they did 12 months ago
- 13% of homeowners, 25% of private tenants, and 17% of social housing tenants say their experience of the last year has made them want to move
- 33% of homeowners, 23% of private tenants, and 24% of social housing tenants say they value more where they live
- 14% of homeowners, 20% of private tenants, and 16% of social housing tenants want more space
- 17% of homeowners, 14% of private tenants, and 7% of social housing tenants better realise the importance of investing in the home

Architectural viewpoints:

“We have always designed houses for the site and not relied upon standard houses. We have always tried to use south facing aspects for large windows to allow light and solar gain despite resistance from planning officers who often want ‘arts and crafts’ style housing.”

“In our view houses need to be flexible to allow for growing families, what starts as a dining room often becomes a music room or gym.”

“The pandemic has clearly had an impact on how people perceive their space at home.”

“We try to over specify insulation as well as exceed building regulations where we can. People are happy to invest in good quality materials and insulation as they view it as a saving and not a cost like years ago.”



SECTION 2:
THE LOCAL
COMMUNITY



Key Findings

By necessity, local communities have become an essential hub of life as movement restrictions forced many to stay and shop local. Having experienced what the local community can offer, most homeowners and private and social housing tenants say they will continue to stay local in the future in a move that should support locally based enterprises.

Community value is generated by people which, when supported by the availability of green spaces and low crime levels, helps keep residents satisfied with where they live and appreciate the value of community to their daily lives.

Time spent in local communities...

- 73% of homeowners, 64% of private tenants, and 66% of social housing tenants have spent more or the same time in their local communities since COVID began
- 72% of homeowners, 71% of private tenants, and 69% of social housing tenants expect they will spend more or about the same time in their local communities over the coming year

What's valued in local communities...

- Green spaces, being close to family & friends, the people and low crime rates are valued most across homeowners and tenants

Architectural viewpoints:

"When it comes to new housing developments, the importance of surrounding local communities has not increased in my view. In my village we have had over 600 new homes built in the past three - five years, but there has been no improvement to the local infrastructure."

"Urban areas are restricted in how local communities can be developed, while more rural locations have better scope for the implementation of neighbourhood plans to influence the local area positively."



SECTION 3:
GOVERNMENT
FOCUS



Key Findings

There is common agreement on the need for more affordable housing provision across homeowners and both private and social housing tenants, as well as more support for those trying to get onto the property ladder for the first time.

Both private and social housing tenants want something done about substandard landlords and substandard properties.

There is a lower level of demand for government to focus on investing in public transport and local infrastructure, but, on average, about one in five want to see an increase in overall investment in more housebuilding.

Government focus...

- When it comes to housing and communities, support for more affordable homes should be the most important focus for government according to homeowners and tenants
- A crackdown on substandard social housing and private landlords was also deemed important
- Other key areas were deemed to be more support for first time buyers, investment in healthcare and more housebuilding

Architectural viewpoints:

“The sad fact is that local planning authorities ignore central Government advice and go their own way. They simply do not embrace development. Just look at the number of LPAs who still do not have their adopted Local Plans or 5-year housing land supply. Without that guidance how can infrastructure providers plan ahead?”

“I believe the Government should force LPAs to have an adopted Local Plan and if they do not, then the Government should remove planning from their jurisdiction. Basically, the system does not work to enable developers to deliver high quality affordable housing.”

“It all comes down to money. I believe government needs to work with developers and lessen the need for high density development by understanding the impact on the land price developers will then pay. Thriving communities need space. We have to decide where to put the increased housing stock we need and that is a political decision which is also linked to infrastructure investment which no developer wants to pay for as it hits their profits.”



**SECTION 4:
SUSTAINABILITY**



Key Findings

Most homeowners are willing to make investments to support sustainability objectives, and a significant proportion of private and social housing tenants also think this is a key area of focus for landlords.

Recycling and limiting energy and water use are the most popular sustainability actions taken by homeowners and tenants. More than one in ten homeowners seek out environmentally friendly / sustainable building products and nearly one in ten already has renewable sources of energy at their property.

It's also interesting to note that nearly one in six homeowners and tenants think the Government should focus more on sustainability, and the findings also show that sustainability has become more important due to the experience of the last 12 months.

Attitudes towards sustainability...

- More than two thirds 69% of homeowners said they are willing to invest in their property to make it more sustainable
- 43% of all private and social housing tenants think sustainability is a key area for landlords to focus on with their properties
- 28% of homeowners and tenants think sustainability / energy-efficiency is important when it comes to their home
- 14% of all those questioned said sustainability is more important to them due to their experience over the last 12 months
- 16% of all those questioned said that the Government should focus more on sustainability

What sustainable actions they take....

- Recycling, turning off appliances, limiting water wastage, and limiting using heating are the top sustainable actions homeowners and tenants take
- 14% seek out environmentally friendly / sustainable building products
- 9% already have renewable sources of energy on the property
- 11% of homeowners say they are considering installing energy efficiency measures such as solar PV, while 8% of tenants say their landlord / housing association is considering doing the same

Architectural viewpoints:

"We always opt for a fabric first approach which is far more sustainable, less obtrusive, and less likely to need ongoing maintenance."

"We advise on new technologies such as air source heat pumps as well as other alternative options and remind clients that it doesn't always have to be like for like."

"Raising awareness of sustainable options is very important, but I feel there is no widescale consumer awareness yet or any real consistent government-led incentive to change behaviours or instinct. As an example, the Green Home Grant was nothing more than a token gesture with far too much red tape."

"People need incentives to drive uptake of renewables and they need to be clear about seeing a payback for costly investments such as solar and battery storage – people ultimately vote with their wallets."

"With people moving home every three or four years, many ask why they should invest in sustainable technologies if they are then going to leave them behind."

"The fabric first approach as in the Future Homes Standard is what we apply, and I believe this is the correct approach to making properties more energy efficient for the long term."



CONCLUSION: ASPIRATIONS ARE CLEAR, BUT DELIVERY BARRIERS EXIST

The research draws out several important factors about the relationship between homeowner/tenant, their homes, their communities, and the sustainable future of living spaces as seen through the prism of the COVID experience.

The research highlights that:

- Many people are seeking good living spaces following a reappraisal of their circumstances post-COVID and are prepared to invest to achieve what they want.
- Homeowners, and to a lesser extent tenants, have been busy during lockdown improving, extending and future proofing their homes.
- A significant number want to see more affordable and good quality housing provided for buyers and renters to support and enhance community growth.
- They highly value safe and welcoming communities that include green spaces in which many expect to spend more time in the future.
- Both private and social housing tenants communicate the need for a focus on quality of housing - issues which the Charter for Social Housing Residents sets out to address.
- Sustainability is one of many considerations when it comes to housing, but for nearly one in six homeowners and tenants, it is an area the Government needs to give greater focus on.

It appears there are some barriers to the delivery of many of the aspirations expressed around the quality of homes, communities, and sustainability in the view of the specification/architectural sector. There is frustration with many aspects of the local planning process and the apparent lack of a cohesive and long-term LPA vision for community development and infrastructure support according to one architect questioned.

This will continue to compromise progress unless changes are made to the current planning system that does in the words of one professional “simply not work”.

In addition, architects and specifiers say the sector could be even better positioned to impact positively on the delivery of a critical issue such as sustainability if a consistent playing field for sustainability standards prevailed, for example, planners in different authorities try to impose different standards than those currently required by building regulations.

Calls are also strongly made for a better co-ordinated, and more consistent, government-led incentive programme to drive greater consumer take-up of the alternative sustainability options now available to enhance and future-proof homes as 2050 draws ever nearer.

For more information on Marley and how its products, solutions, and services can help meet the needs of homes and communities today and for the future, **visit www.marley.co.uk**.

