Feel GOOD, LIVE WELL.

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016**

Multi Comfort
BY SAINT-GOBAIN

SAINT-GOBAIN

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Welcome

People are becoming more interested and concerned with their health, wellbeing and the positive choices they can make to improve their lives. As human beings, we typically spend 90% of our time indoors either in vehicles or in buildings, working, learning or socialising. Much of this time in buildings we spend in our homes.

Our homes therefore have a strong impact on our daily lives, in terms of our comfort, health and general wellbeing. Jointly, academia and the built environment sector are discovering more and more about the links between sustainable, well-designed homes and the improved health and wellbeing of people.

Saint-Gobain is committed to collaborating with academia and other businesses in the built environment sector to further this research and demonstrate how better buildings can improve **comfort**, **health** and **wellbeing** for UK homeowners and renters.

As well as conducting a variety of research we were also intrigued to ask UK homeowners and renters directly about their respective priorities regarding their own **comfort**, **health** and **wellbeing**, with a particular focus on how this is currently influenced by their own homes and living environment.

This report outlines the findings from this research where we asked over 3,000 UK homeowners and renters a range of questions about this subject. The results and conclusions drawn we believe, will give far greater insight, into this area and identify opportunities for those with a role in developing, designing, delivering or managing housing.

We welcome your feedback on the report, and hope you will also contribute to furthering this developing and important area of public health research.

Mike Chaldecott
General Delegate and Regional CEO, Construction Products
Saint-Gobain UK & Ireland

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Contents

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016**

A study of homeowners' and renters' respective priorities regarding their **comfort**, **health** and **wellbeing**, with particular focus on how this is influenced by their homes and living environment.

Research conducted 2016

Report published March 2017

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

The context

Health & Wellbeing is a megatrend

Health, wellness and wellbeing are becoming mainstream. It is increasingly influencing our buying and decision making process, spanning generations and consumer demographics. It applies to anyone and everyone who wants to be healthy, happy, look good, stay productive and active.

Our homes influence almost every part of our daily life. The building itself can directly influence a variety of factors, from how well we sleep and how comfortable we are day-to-day, to how well we feel. Much work has been carried out on establishing the links between sustainable, well-designed homes and better health and wellbeing in home owners and renters.

A good report reviewing the research in this area was produced during 2016 by the UK Green Building Council.

UK GREEN BUILDING COUNCIL
Member

Visit *www.ukgbc.org/campaigns-policy/campaigns/health-wellbeing-and-productivity/health-and-wellbeing-homes*

SAINT-GOBAIN

Saint-Gobain creates great living places and helps improve daily life

As the world's largest provider of building materials and construction technologies, Saint-Gobain creates and delivers innovative, high-performance solutions that can make homes great places to live. In the UK and Ireland some of the best known and respected companies in the construction sector are part of Saint-Gobain including British Gypsum, Celotex, Ecophon, Gibbs and Dandy, Glassolutions, Graham, Isover, Jewson, Pasquill, Saint-Gobain Glass, Saint-Gobain PAM and Weber. Together, our brands offer a range of high performance solutions that can improve living comfort, and therefore our general wellbeing.

Multi Comfort Buildings

We have also pioneered a new building concept — Multi Comfort buildings. This design concept is about building and renovating our homes, offices, schools, hospitals and other buildings in a way that gives us improved **comfort**, **health** and **wellbeing** whilst protecting the environment.

Breathe Feel Hear See

Visit **www.multicomfort.co.uk** to find out more and see how our programme of trial buildings are progressing.

Kings WORCESTER

SpellerMetcalfe

AssociatedArchitects

Bartholomew Barn, Kings Junior School, Worcester

The UK's first ever Multi Comfort building, visit **www.multicomfort.co.uk**

The UK **Home**, **Health** and **Wellbeing** Survey

The objective of this survey was to find out if UK homeowners and renters prioritise their own health and wellbeing, and if they recognise and value, the attributes of a home that can affect their **comfort**, **health** and **wellbeing.** Over recent years there has been a large drive from Government schemes such as CERT, Eco, the Green Deal and others to motivate homeowners and renters to consider the energy efficiency of their homes, but not to inform homeowners and renters about how the buildings where they spend their time, and in particular their homes, can impact their **comfort**, **health** and **wellbeing.**

Therefore, during 2016, Saint-Gobain UK and Ireland conducted a survey of 3024 UK homeowners and renters. The research was carried out via an online survey methodology, whereby suitable respondents were 'screened' and invited to participate in the survey using an online research panel. Respondents were directed to an online questionnaire which took approximately 15 — 20 minutes to complete.

The research fieldwork was undertaken by Research Now during 2016. The results of this research are shared here, in The UK **Home**, **Health** and **Wellbeing** Report **2016**.

research now®

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

About

The aims of this survey were to find out if UK homeowners and renters prioritise their own health and wellbeing, and if they recognise and value, the attributes of a home that can affect their **comfort**, **health** and **wellbeing**.

The questions employed as part of this survey UK Homeowners and Renters, fall in to three areas:

1. UK homeowners' and renters' own health and wellbeing
2. UK homeowners' and renters' existing homes
3. UK homeowners' and renters' ideal home

UK homeowner and renter's own health and wellbeing

This part of the survey wanted to gather insight on how UK homeowners and renters prioritise their own health and wellbeing. Questions in this part cover views on eating healthily, exercise, and monitoring their own health and wellbeing, in addition to sing the question on whether they are concerned about the health and wellbeing impacts of the buildings where they spend their time.

Turn to pages 18 — 29 for the results.



UK homeowner and renter's existing homes

This part of the survey aimed to find out how people describe their current homes and the issues they have. It also explores what UK homeowner and renter's would like to change about their existing homes.

Turn to pages 30 — 39 for the results.





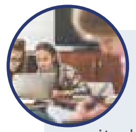
3 IDEAL HOME

UK homeowner and renter's ideal home

This part of the survey asked UK homeowners and renters to consider their ideal home environment and choose the attributes that describe their ideal home the most and the least.

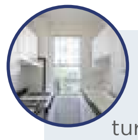
Each respondent was asked to consider a total of 35 attributes. The work of the UK Green Building Council's (UK-GBC's) Healthy Homes Task Group reviewed the evidence on the links between health and wellbeing and the design of homes and neighbourhoods (refer to page 6). From this content we were able to present a summary list of 25 individual attributes or factors that could influence a healthier home and neighbourhood that promotes improved wellness for homeowners or renters, including:


A home where you're not disturbed by noise from neighbours or outside


A home where you're not disturbed by noise from others inside the home or its heating system/appliances


A home environment that protects you from outdoor pollution

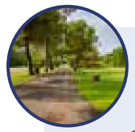

A home environment with safe levels of indoor pollution (e.g. carbon monoxide, formalehyde, dust mites etc.)


A home with plenty of natural light, no need to turn lights on during the day


A home environment with no condensation, dampness or mould


A home that's warm indoors without the need for excessive heating in the Winter


A home that's cool indoors without the need for air-conditioning in Summer


A home that is close to outside space to exercise or has nearby exercise or leisure facilities


A home that helps you relax and unwind


A home where I have views of nature and greenery


A home where I feel safe and secure


A home environment that promotes healthy sleep


A home with flexible internal space allowing family and friends to share time together


A neighbourhood where children can play outside safely


A home where I have access to fresh, locally grown food


A home that facilitates interaction with neighbours and the community


A place that will adapt with you and your family as we age or our needs change


A home with the provision of well-maintained communal spaces


A home that has good access to transport


A home that I can afford to run and maintain


A home that is resilient to changes in weather patterns or temperature

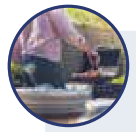

A fully digital, wireless home


A home that is energy efficient with low utility bills

A key objective of the research was to derive the overall importance of these factors, against the more traditional attributes that people value when purchasing or renting a home, including:


A home that is close to my work


A home that has off-street parking/garage


A home with a south-facing garden

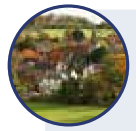

A home that is close to the shops, pubs, bars and restaurants


An older home that has lots of character


A newer home that is modern and low maintenance


A home that will improve in value and will have desirability when sold


A home that is not overseen and looked in to by neighbours


An area that has low or no crime


A home that is in a desirable postcode location


A home that is in the catchment area of a good school

This part of the research used a MaxDiff trade-off technique, in order to collect suitable data and switch the relative importance of these 35 individual attributes or factors when UK homeowners and renters describe their ideal home environment.

Turn to pages 40 — 47 for the results.

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Respondents

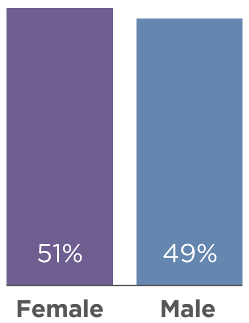
We asked 3,024 UK homeowners and renters the questions outlined for this survey. In addition to being representative from a basic demographic profile, the sample was split evenly between those who own their home and those who rent, either privately or via social housing. The online methodology aimed to provide a representative spread of respondents across all UK regions three-quarters of the sample live in a house (mainly semi-detached); the remaining quarter live in (mainly purpose built) apartments or flats.

Sample Profile

The research was carried out via an online survey, whereby respondents were 'screened' on whether they were homeowners/buyers or social/private renters, and invited to participate in the survey using an online research panel provided by *Research Now*. Respondents were directed to an online questionnaire which took approximately 15 – 20 minutes to complete. Interviews were conducted between 29th April – 20th May 2016.

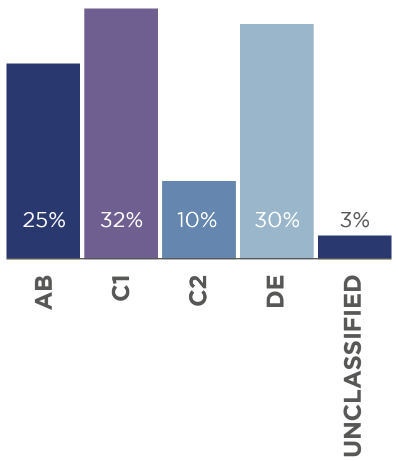
Age	No. of respondents	%
18 — 24	393	13%
25 — 34	506	17%
35 — 44	535	18%
45 — 54	551	18%
55 — 64	464	15%
65+	575	19%
Total	**3,024**	**100%**

Gender



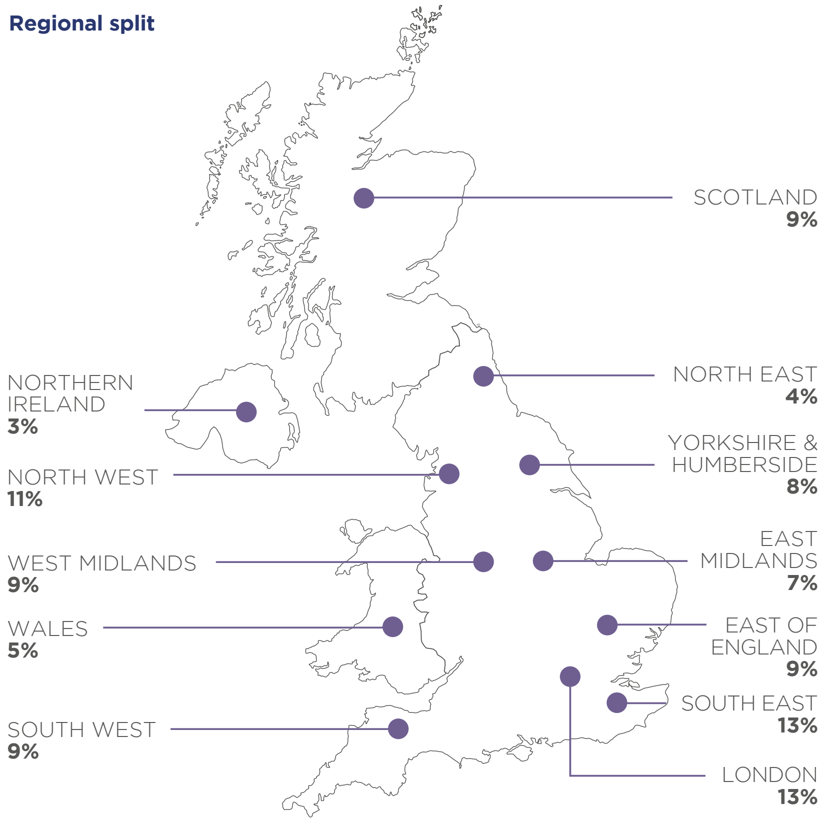
Family Life-Stage	No. of respondents	%
Single	654	22%
Single parent	117	4%
Married/cohabiting but not had children	571	19%
Married/cohabiting with children at home	728	24%
Married/cohabiting and children have left home	510	17%
Married/cohabiting with children and have children who have left home	133	4%
Divorced	216	7%
Widowed	95	3%
Total	**3,024**	**100%**

Socio-Economic Group



Tenure	No. of respondents	%	
Own the home outright (i.e. paid off mortgage)	782	26%	**Homeowners 50%**
Own the home but are paying off the mortgage	709	23%	
Shared ownership (part rent/part own)	21	1%	
Rent your home (private landlord)	896	30%	**Renters 50%**
Rent your home (Council/Housing Association)	616	20%	
Total	**3,024**	**100%**	

Regional split



Housing type	No. of respondents	%	
Detached	575	19%	**HOUSE** 2,264 respondents 75%
Semi detached	841	28%	
Bungalow	188	6%	
Terraced house	619	20%	
Town house	41	1%	
Purpose built flat	551	18%	**FLAT** 747 respondents 25%
Converted flat	181	6%	
Maisonette	15	0.5%	
Other	13	0.4%	
Total	**3,024**	**100%**	

MOSAIC analysis

Mosaic is Experian's most comprehensive cross-channel consumer classification. Using new data methods you get deeper insights on consumer lifestyles and behaviour to help you make more informed marketing decisions.

Mosaic gives you a pin-sharp picture of today's UK consumer, reflecting the latest consumer and societal trends. Over 850 million pieces of information across 450 different data points are condensed using the latest analytical techniques to identify 15 summary groups.

We have analysed the results from UK homeowners and renters according to their Mosaic group. Presented in this way, as well as by gender, geography and house type, the findings could be of additional interest to many colleagues within the built environment sector: including those with a role in developing, designing, delivering or managing housing.

MOSAIC Summary Groups

A

City Prosperity

High status city dwellers living in central locations and pursuing careers with high rewards

City Prosperity work in high status positions. Commanding substantial salaries they are able to afford expensive urban homes. They live and work predominantly in London, with many found in and around the City or in locations a short commute away. Well-educated, confident and ambitious, this elite group is able to enjoy their wealth and the advantages of living in a world-class capital to the full.

B

Prestige Positions

Established families in large detached homes living upmarket lifestyles

Prestige Positions are affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children.

C

Country Living

Well-off owners in rural locations enjoying the benefits of country life

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

D

Rural Reality

Householders living in inexpensive homes in village communities

Rural Reality are people who live in rural communities and generally own their relatively low cost homes. Their moderate incomes come mostly from employment with local firms or from running their own small business.

E

Senior Security

Elderly people with assets who are enjoying a comfortable retirement

Senior Security are elderly singles and couples who are still living independently in comfortable homes that they own. Property equity gives them a reassuring level of financial security. This group includes people who have remained in family homes after their children have left, and those who have chosen to downsize to live among others of similar ages and lifestyles.

F

Suburban Stability

Mature suburban owners living settled lives in mid-range housing

Suburban Stability are typically mature couples or families, some enjoying recent empty-nest status and others with older children still at home. They live in mid-range family homes in traditional suburbs where they have been settled for many years.

G

Domestic Success

Thriving families who are busy bringing up children and following careers

Domestic Success are high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.

H

Aspiring Homemakers

Younger households settling down in housing priced within their means

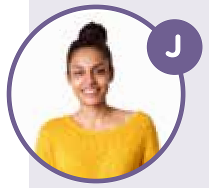
Aspiring Homemakers are younger households who have, often, only recently set up home. They usually own their homes in private suburbs, which they have chosen to fit their budget.

I

Family Basics

Families with limited resources who have to budget to make ends meet

Family Basics are families with children who have limited budgets and can struggle to make ends meet. Their homes are low cost and are often found in areas with fewer employment options.



J

Transient Renters

Single people privately renting low cost homes for the short term

Transient Renters are single people who pay modest rents for low cost homes. Mainly younger people, they are highly transient, often living in a property for only a short length of time before moving on.

K

Municipal Challenge

Urban renters of social housing facing an array of challenges

Municipal Challenge are long-term social renters living in low-value multi-storey flats in urban locations, or small terraces on outlying estates. These are challenged neighbourhoods with limited employment options and correspondingly low household incomes.

L

Vintage Value

Elderly people reliant on support to meet financial or practical needs

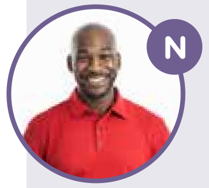
Vintage Value are elderly people who mostly live alone, either in social or private housing, often built with the elderly in mind. Levels of independence vary, but with health needs growing and incomes declining, many require an increasing amount of support.

M

Modest Traditions

Mature homeowners of value homes enjoying stable lifestyles

Modest Traditions are older people living in inexpensive homes that they own, often with the mortgage nearly paid off. Both incomes and qualifications are modest, but most enjoy a reasonable standard of living. They are long-settled residents having lived in their neighbourhoods for many years.



N

Urban Cohesion

Residents of settled urban communities with a strong sense of identity

Urban Cohesion are settled extended families and older people who live in multi-cultural city suburbs. Most have bought their own homes and have been settled in these neighbourhoods for many years, enjoying the sense of community they feel there.

O

Rental Hubs

Educated young people privately renting in urban neighbourhoods

Rental Hubs contains predominantly young, single people in their 20s and 30s who live in urban locations and rent their homes from private landlords while in the early stages of their careers, or pursuing studies.

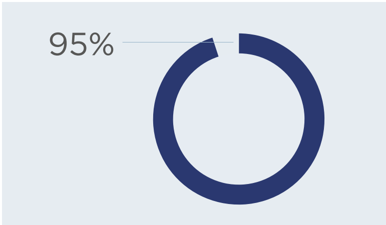
THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Headlines

From surveying 3024 UK based homeowners and renters, the headline results from this are as follows:

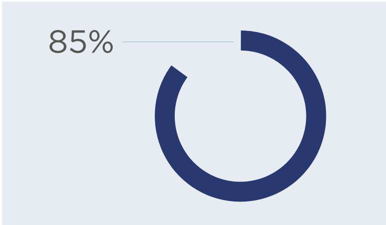
People are increasingly concerned about their health and wellbeing

Over **95%** of homeowners and renters make some effort to look after their health and wellbeing



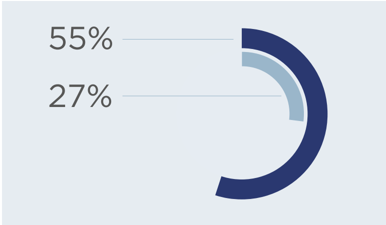
People are paying attention to their diet

85% of those surveyed aim to eat healthily some or most of the time

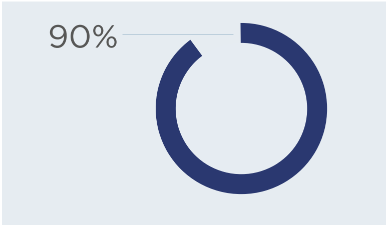


People are increasingly aware of the need to exercise

55% exercise at least occasionally and **27%** regularly



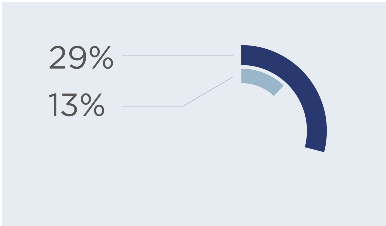
90% of those surveyed buying or moving in to a new home are concerned about the impact their homes would have on their health and wellbeing



People want homes that won’t compromise their health and wellbeing

29% would be prepared to pay more for a home that won’t compromise their health and wellbeing

13% are more prepared to pay for a home that won’t compromise their health and wellbeing than an environmentally friendly home



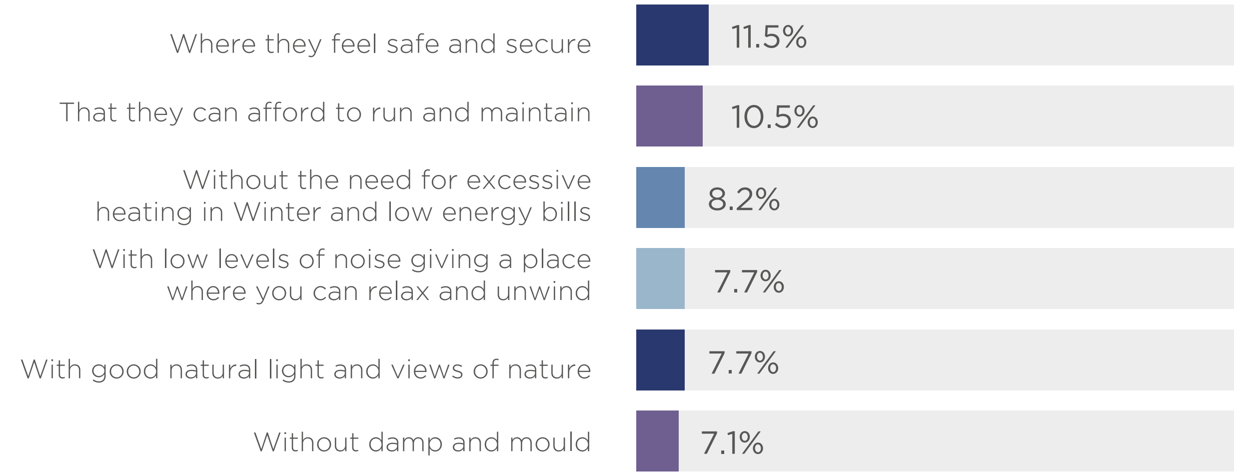
The **Top 3** health and wellbeing issues they would like to change in their existing home are:


It has high energy bills


It is too cold in the winter


There is noise from neighbours

When asked to select features of their ideal home, homeowners and renters most want a home with the following attributes:



Each of these factors are valued as **3 times more important** than a home that will improve in value or have desirability when sold

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Findings

HEALTH & WELLBEING 1

Part 1: UK homeowner and renter's own health and wellbeing

This part of the survey demonstrates how UK homeowners and renters prioritise their own health and wellbeing. It also gives a snapshot of their feelings on energy efficiency when it comes to their own homes and reveals how the impact of homes on their health and wellbeing would influence their future home choice.

The questions asked in Part 1 of the UK Home, Health and Wellbeing Report

- Are UK homeowners and renters aware of their home's energy performance?
- Do ratings influence people's choice of homes?
- How do UK homeowners and renters rate their own health and wellbeing?
- What do they do to influence their own health and wellbeing?
- Would the impact of a home on their health and wellbeing influence their home choice?

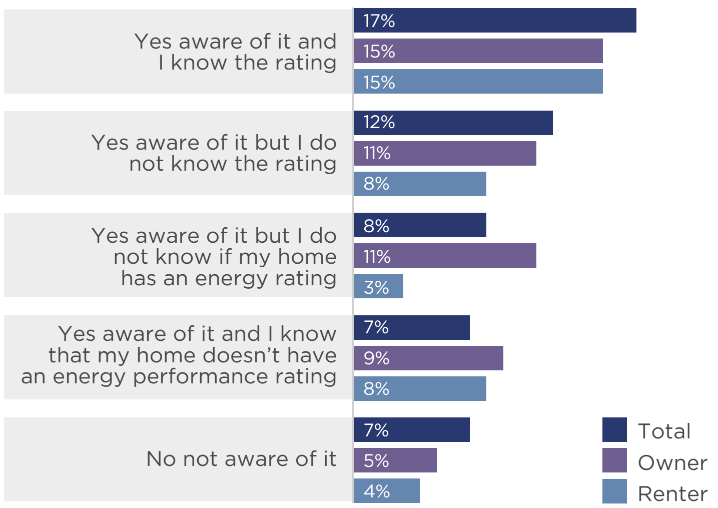
Homeowner and renter's attitudes towards home energy efficiency

80% of all UK homeowners and renters have some awareness of what home energy performance ratings are, with awareness being higher among homeowners (89%) than renters (72%). Awareness is also higher among older age groups (82% of 55 year olds+) compared to younger age groups (77% of 18 — 24 year olds).

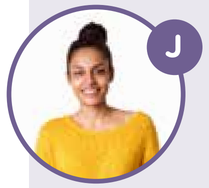
However when asked, just 17% of all respondents knew the actual energy performance rating of their own home. This was higher for homeowners at 22%, compared to renters with just 13% knowing the energy rating of their own home, and was highest amongst the under 34 age groups (21%).

Question

Thinking about energy efficiency ratings, which of the following best reflects your home energy performance rating knowledge?



Despite just 13% of all renters knowing their home's energy performance rating, this was much higher for those respondents classed by Mosaic analysis as 'Rental Hubs' and 'Transient Renters', suggesting that a home's energy performance rating is of higher importance to those renting privately in city centres. Knowledge of their home's energy performance rating was also higher among respondents classed by Mosaic analysis as 'Country Living' (24%), where more properties would be likely to be off main grid gas, and so perhaps the cost of energy would be more important.



J

Transient Renters

Single people privately renting low cost homes for the short term

Transient Renters are single people who pay modest rents for low cost homes. Mainly younger people, they are highly transient, often living in a property for only a short length of time before moving on.

O

Rental Hubs

Educated young people privately renting in urban neighbourhoods

Rental Hubs contains predominantly young, single people in their 20s and 30s who live in urban locations and rent their homes from private landlords while in the early stages of their careers, or pursuing studies.

C

Country Living

Well-off owners in rural locations enjoying the benefits of country life

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

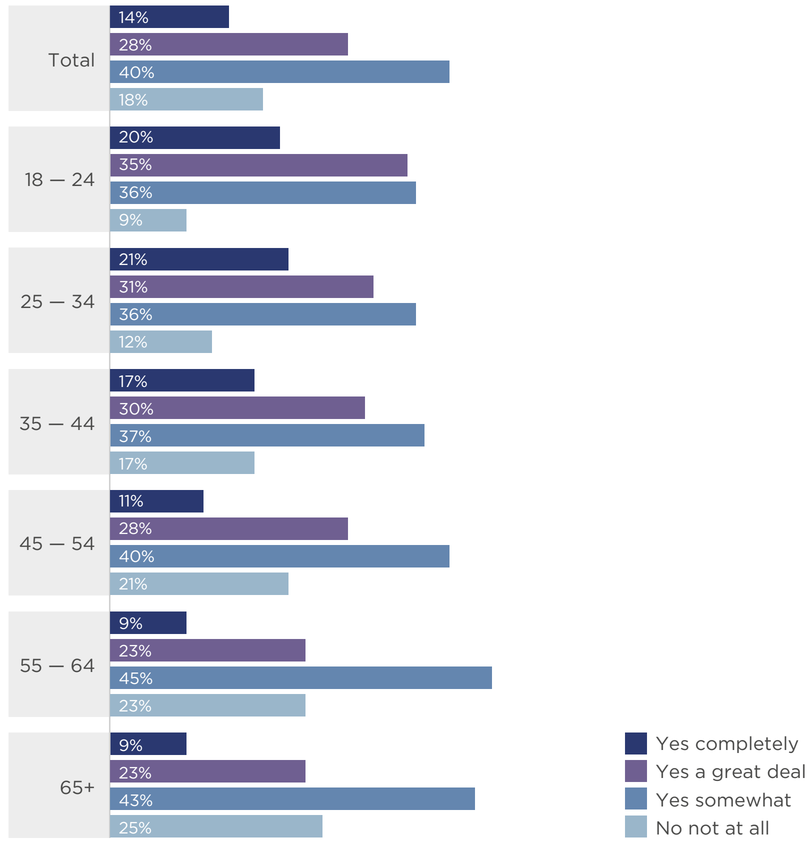
82% of all UK homeowners and renters stated that the energy performance rating of a home would have some influence on their choice of home to rent or buy. This number increased for the two youngest age groups with 88% of 25 — 34 year olds and 91% of 18 — 24 year olds. This suggests a picture of younger renters being the most likely group to be influenced by energy ratings when it comes to choosing a home to rent or buy.

However it was the highest amongst the Mosaic group 'Urban Cohesion' at 89% for those people that have been settled in urban areas for some time.

Response by age group

Question

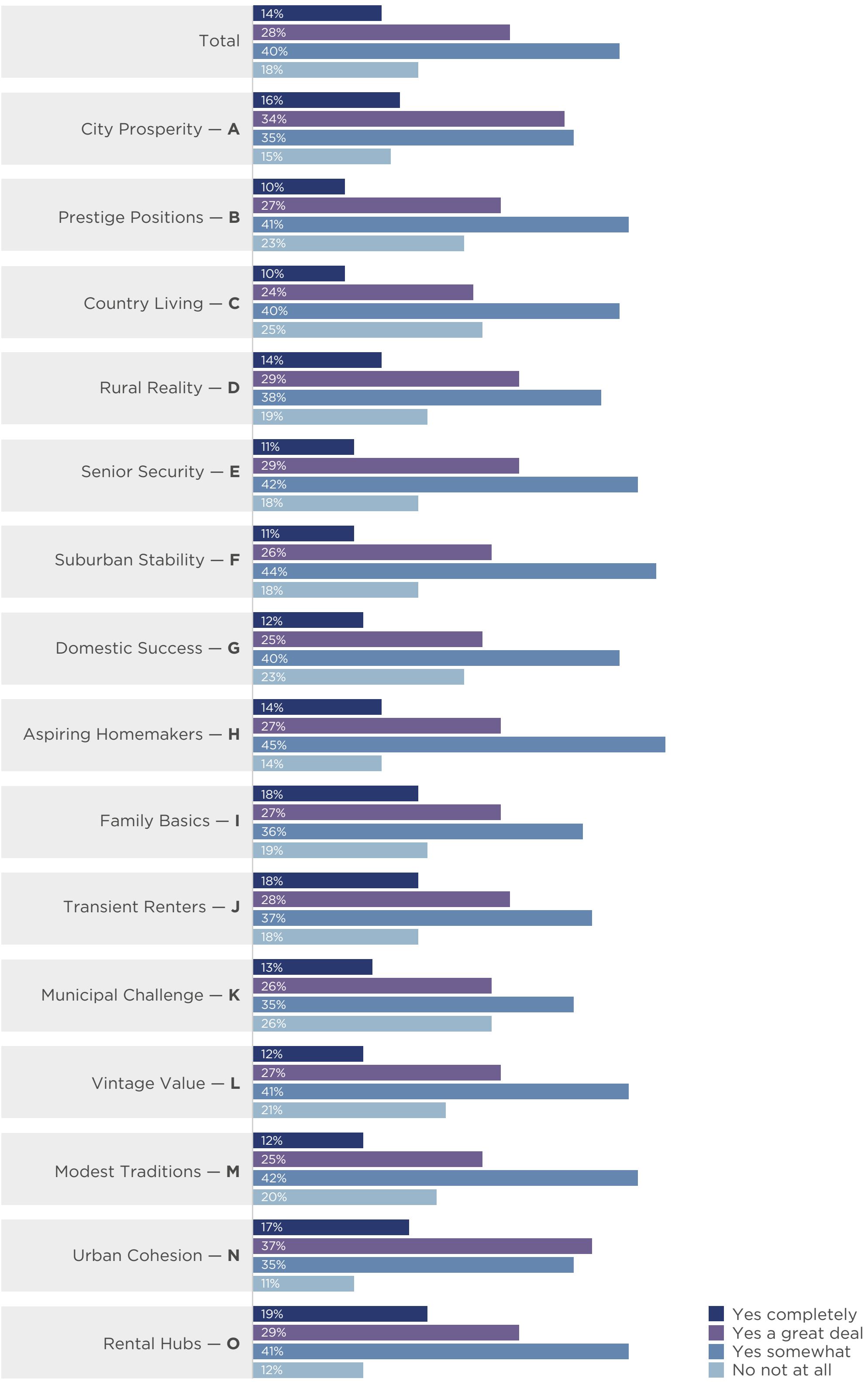
Would the energy efficiency performance rating of a home you would look to buy or move in to next, affect your choice?



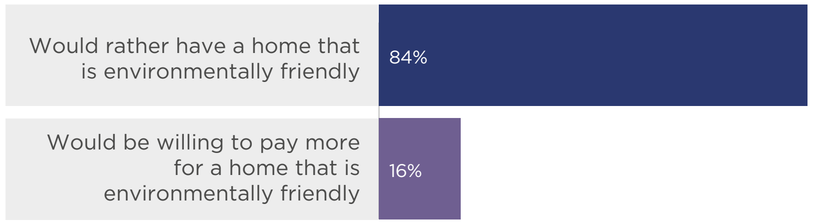
Question

Would the energy efficiency performance rating of a home you would look to buy or move in to next, affect your choice?

Response by MOSAIC Summary group

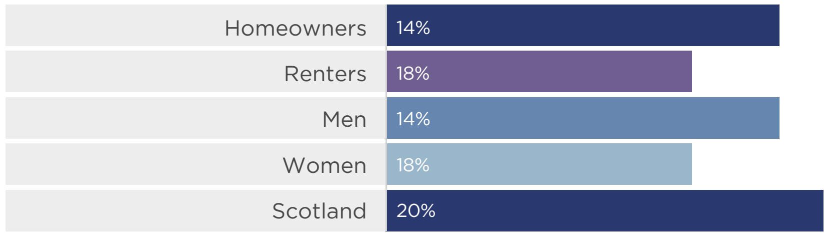


We also asked UK homeowners and renters if they were thinking about buying or moving to a new home would they be influenced by the impact that home would have on the environment. 84% of all respondents would rather have a home that is environmentally friendly, but only 16% of all respondents would be willing to pay more for an environmentally friendly home.



Total respondents

Although slightly higher for homeowners (18%) compared to renters (14%), and for men (18%) compared to women (14%), it is only in Scotland where this increases to 20% of people willing to pay more for a home that is environmentally friendly.



Would be willing to pay more for a home that is environmentally friendly

Looking at the Mosaic analysis, similarly to the energy efficiency question, those classed as 'Country Living' would be more prepared to pay (23%). Again, this could be linked to more homes being off main grid gas.

Country Living

Well-off owners in rural locations enjoying the benefits of country life

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

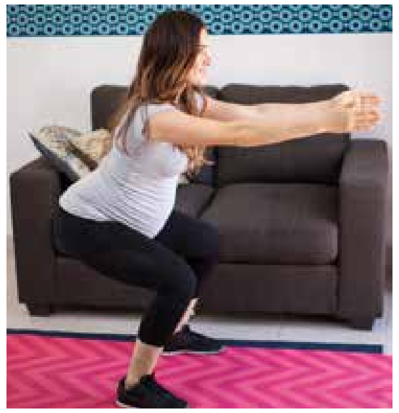
A home with a poor energy efficiency rating would typically be cold, draughty and could often feel damp and have condensation issues. Many of these factors in a home can also affect homeowner and renter's **comfort**, **health** and **wellbeing**.

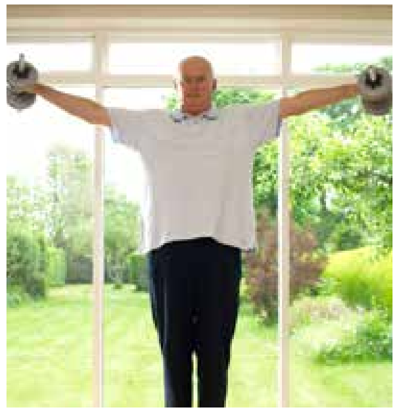
Homeowner and renter's own health and wellbeing

In order to gauge general UK opinion on the overall megatrend for increasing health, wellness and wellbeing, one of the topics on which respondents were surveyed was their behaviour and attitudes towards healthy eating and exercise.

This research shows that overall, UK homeowners and renters across all age groups, tend to rate their state of health and wellbeing as at least fairly good. Around a third of all respondents actually rate their health and wellbeing as better than this, being either very good or excellent. Staggeringly, over 95% of homeowners and renters surveyed make some effort to look after their health and wellbeing, seemingly lending support to this leading trend.

The majority of UK homeowners and renters have health and wellbeing featuring pretty high on their agenda and engage in some form of health related activities:

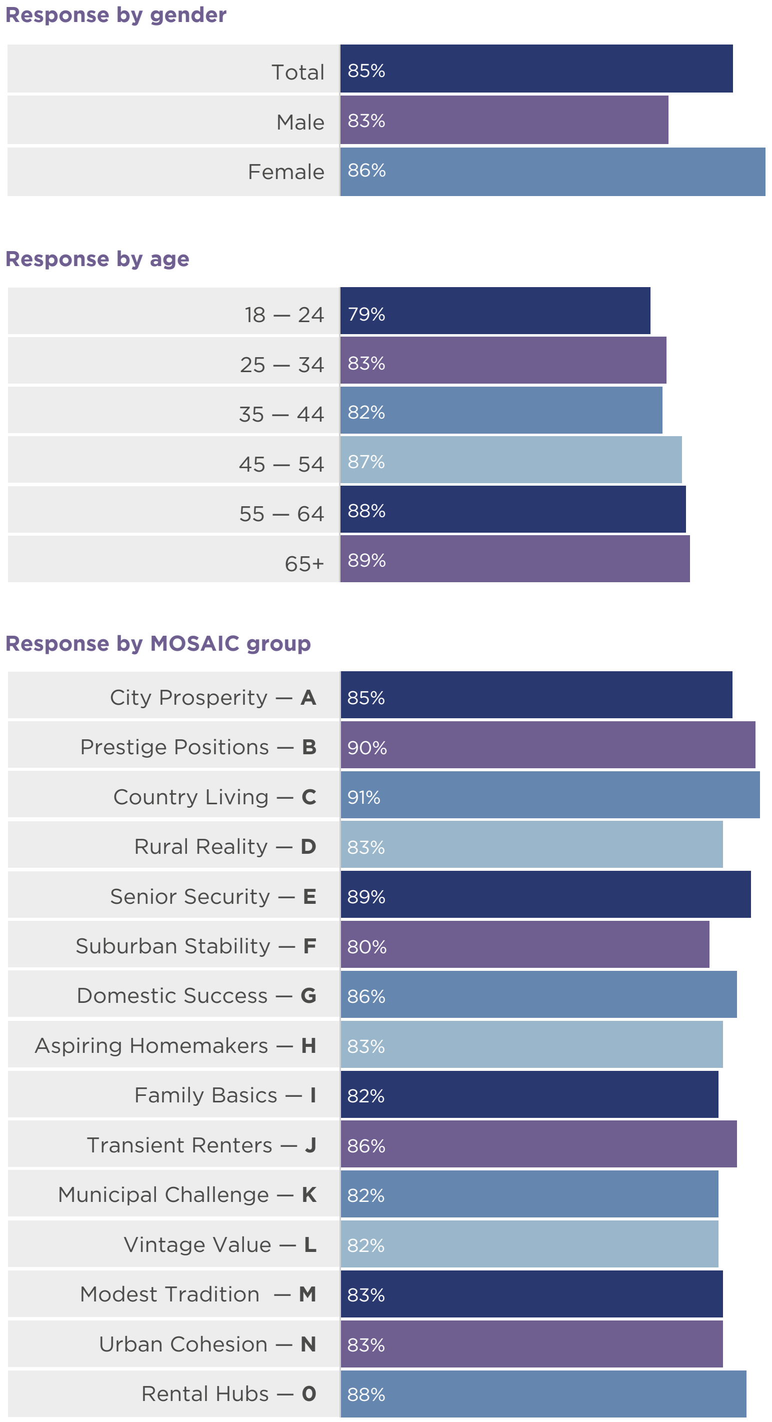




Eating healthily

85% of all UK homeowners and aim to eat healthily some or most of the time. There was only a small difference in male and female responses, with 86% of women claiming this versus 83% of men. There were bigger differences however when looking at the age groups of respondents. 89% of over 65's aim to eat healthily, with more than 60% claiming to do this most of the time, compared to just 42% of 18 — 24 year olds. The South West is the healthiest eating region with 91% of all age group's eating healthily some or most of the time.

Looking at the Mosaic Group Analysis, those categorised as 'Prestigious Positions' and 'Country Living' are the only groups that have more than 90% eating healthily some or most of the time.

I make an effort to eat healthily most/some of the time





Exercising

More than half of all UK homeowners and renters, (56%), exercise regularly or at least occasionally. The response was higher for homeowners (59%) compared to renters (53%), and higher for older age groups 55 years and above (60%), for those in the North East (60%), for those living in either purpose built flats or detached houses (59%) or converted flats (60%), and for those respondents who are parents but the children have left home (63%).

Question

Which, if any, of the following would you say apply to your own health and wellbeing?

Answer: I exercise regularly/occasionally

Response by gender

Total	56%
Male	57%
Female	53%

Response by age group

18 – 24	54%
25 – 34	53%
35 – 44	50%
45 – 54	55%
55 – 64	60%
65+	59%

Response by region

East Midlands	57%
East of England	59%
London	52%
North East	60%
North West	50%
Northern Ireland	58%
Scotland	57%
South East	57%
South West	58%
Wales	56%
West Midlands	57%
Yorkshire & Humberside	50%

Response by family life stage

Single	59%
Single parent	40%
Married/cohabiting but had no children	56%
Married/cohabiting with children at home	50%
Married/cohabiting and children have left home	63%
Married/cohabiting with children and have children who have left home	49%
Divorced	58%
Widowed	50%

Response by home type

Detached	59%
Semi detached	54%
Bungalow	55%
Terraced house	50%
Town house	54%
Purpose built flat	59%
Converted flat	60%

Exercise & Healthy Eating Consumer Trends

It may have crept up on us, but the UK population appears to be following in LA's glamorous footprints. Large swathes of the population are on a health kick. This is reflected in the way that members of the public have embraced different types of fitness regimes, from yoga to CrossFit; their aversion to fast food brands and women's unprecedented participation in competitive sporting activity. Cumulatively, this indicates a genuine evolution in UK consumer lifestyles. The Leisure Database Industry estimates the UK fitness industry is worth £4.3 billion and another source predicts the global weight loss market will reach £220 billion by 2017.

Source: 2015 Crimson Hexagon, Consumer Trends Report

Wearable technology

To support the trend for homeowners and renters undertaking exercise to protect or enhance their own health and wellbeing, we asked if people use wearable technology devices to monitor their health and wellbeing. Of the total sample of respondents, just 8% surveyed said they used such devices, but there were some interesting results among particular groups. Usage is higher among the 44 and under age groups (12%), and reduces to 5% for those aged 45 or over.

Similarly to the general exercise results, the use of wearable devices is highest in the North East (14%). When considering the Mosaic group analysis, 'Suburban Stability' and 'Domestic Success' groups have the highest use of wearable devices, both at 12%.

Question

Which, if any, of the following would you say apply to your own health and wellbeing?

Answer: I use wearable devices to monitor my health and wellbeing (e.g.fitbit, Strava, runkeeper)

Response by age group

Total	8%
44 and under	12%
45 and over	5%

Response by region

East Midlands	8%
East of England	8%
London	7%
North East	14%
North West	6%
Northern Ireland	5%
Scotland	10%
South East	10%
South West	7%
Wales	5%
West Midlands	8%
Yorkshire & Humberside	8%

Response by MOSAIC group

City Prosperity – A	7%
Prestige Positions – B	8%
Country Living – C	5%
Rural Reality – D	6%
Senior Security – E	7%
Suburban Stability – F	12%
Domestic Success – G	12%
Aspiring Homemakers – H	7%
Family Basics – I	6%
Transient Renters – J	8%
Municipal Challenge – K	10%
Vintage Value – L	7%
Modest Traditions – M	6%
Urban Cohesion – N	4%
Rental Hubs – O	10%

Wearable Devices and Consumer Trends

One of the latest forecasts of the UK market for smart wearable devices underlines the potential of this category of emerging technology. CCS Insight estimates that by the end of 2016 there were approximately 10 million wearable devices in use in the UK. They forecast that this number will triple over the next four years to almost 33 million units.

Fitness trackers, which are counted as part of CCS Insight's quantified-self category, are by far and away the biggest by sales volume, with 1.7 million expected to be sold this year.

However, in terms of value, smartphone companions will form the largest category. Sales of smartphone companions, including smart-watches such as the Apple Watch, will be worth almost £300 million in 2016. By 2020 this type of device will account for 34% of the value of the wearable's market, with shipments growing from 1.5 million in 2016 to 3.6 million in 2020.

Source: www.ccsinsight.com

Time for health and wellbeing

According to Wikipedia, 'money-rich, time-poor' is an expression which arose in Britain at the end of the 20th century to describe groups of people who, which having a high disposable income through well-paid employment, have relatively little leisure time as a result. So we asked UK homeowners and renters if they make time to look after their health and wellbeing. Overall, 23% of all respondents claimed to make time, with this being consistent across homeowners, renters, men and women respondents.

Unsurprisingly, this was higher for the (assumed retired), over 65 age group (28%) but again, consistent across all other age groups. More respondents that are Divorced (27%) or Widowed (32%) make time to look after their own health and wellbeing. As do those respondents that earn between £60 — 100,000 per annum (32%).

However, again the North East region leads the way in the amount of respondents who make time to look after their health and wellbeing (30%), followed by London, the South East, the West Midlands and the East of England all at 25%. East Midlands, Yorkshire and Humber are less than 20%.

Question

Which, if any, of the following would you say apply to your own health and wellbeing?

Answer: I make time to look after my health and wellbeing

Response by age group

18 — 24	21%
25 — 34	22%
35 — 44	21%
45 — 54	23%
55 — 64	24%
65+	28%

Response by region

East Midlands	8%
East of England	8%
London	7%
North East	14%
North West	6%
Northern Ireland	5%
Scotland	10%
South East	10%
South West	7%
Wales	5%
West Midlands	8%
Yorkshire & Humberside	8%

Response by family life stage

Single	25%
Single parent	15%
Married/cohabiting but had no children	24%
Married/cohabiting with children at home	21%
Married/cohabiting and children have left home	24%
Married/cohabiting with children and have children who have left home	20%
Divorced	27%
Widowed	32%

Response by household income

Up to £20,000	18%
£20,001 — £30,000	22%
£30,001 — £40,000	23%
£40,001 — £50,000	24%
£50,001 — £60,000	25%
£60,001 — £70,000	31%
£70,001 — £80,000	34%
£80,001 — £100,000	31%
£100,001 or over	25%

Connection between personal health and wellbeing and buildings?

Following on from the questions regarding the personal health and wellbeing attitudes and behaviours of UK homeowners and renters, we asked if they were concerned about the impact the buildings where they spend their time may impact on their health and wellbeing.

Buildings have a huge impact on our lives: whether it's at home, at work, or at school. As human beings we now typically spend up to 90% of our time indoors. Despite this, few people question whether the buildings, in which they spend their day-to-day lives, provide an environment that affects their overall comfort and wellbeing, either in a good way or not such a good way.

Before asking the 3,024 UK homeowners and renters directly about the impact of their homes on their health and wellbeing, only around 10% specifically mentioned concerns about the impact of the buildings they use may have on their health and wellbeing. In the context of a reasonably strong focus on health and wellness generally, this might have been expected to be higher.

From this sample, it would suggest that UK consumers, as homeowners or renters, are not generally aware that homes can have an impact on their health and wellbeing. This would explain why people generally are not yet compelled to demand a home that has positive health and wellbeing attributes either built in or retrofitted

Will monitors change demand for better homes

Not so long ago, a smoke detector and a wall-mounted thermometer and/or barometer were generally the extent of indoor monitoring devices for the home. But a number of devices are appearing designed to increase our knowledge about the environment in which we spend most of our time. Measuring noise levels, indoor air quality, thermal conditions, humidity and daylight for example is all now possible via varying devices at reasonable costs.

Just like using wearable health and fitness devices, it is easy to imagine how the availability of such sensors will allow homeowners and renters to discover how their indoor environment shapes up, and is likely to lead to then ask such questions as: **Does this explain why I feel like this? What can I do to improve my indoor environment?** Maybe this will drive the demand for homes that provide increased health and wellness.

When directly asked when thinking about buying or moving to a new home and the impact that home could have on you, almost all homeowners and renters, in fact 90%, would want a home that does not negatively impact on their health and wellbeing.

In addition 29% of homeowners and renters would pay more for a home that does not compromise their own health and wellbeing. This is significantly higher than the number that would be willing to pay more for a home that is just energy efficient or environmentally friendly. This number increases for homeowners (31%) compared to renters (27%), and for younger age groups: 18 — 34 year olds (31%). The number prepared to pay more for a home that does not impact on their health and wellbeing was also higher in Wales (35%) and Northern Ireland (38%).

Question

Thinking about buying or moving to a new home and the impact that home could have on you, which one of these statements would you agree with?

Answer: I want a home that doesn't compromise my health and wellbeing and would pay more

Response by tenure

Total	29%
Owner	31%
Renter	27%

Response by age group

18 — 24	31%
25 — 34	32%
35 — 44	30%
45 — 54	28%
55 — 64	28%
65+	27%

Response by region

East Midlands	29%
East of England	31%
London	32%
North East	30%
North West	30%
Northern Ireland	38%
Scotland	31%
South East	27%
South West	27%
Wales	35%
West Midlands	26%
Yorkshire & Humberside	21%

Response by MOSAIC group

City Prosperity — A	38%
Prestige Positions — B	38%
Country Living — C	37%
Rural Reality — D	28%
Senior Security — E	27%
Suburban Stability — F	27%
Domestic Success — G	25%
Aspiring Homemakers — H	28%
Family Basics — I	24%
Transient Renters — J	32%
Municipal Challenge — K	23%
Vintage Value — L	27%
Modest Traditions — M	22%
Urban Cohesion — N	26%
Rental Hubs — O	34%

From the Mosaic analysis, there are several groups of UK homeowners and renters prepared to pay more for a home that does not compromise their health and wellbeing, including 'City Prosperity' – 38% would pay more, 'Prestige Positions' – 38% would pay more, 'Country Living' – 37% would pay more, plus 'Rental Hubs' – 34% and 'Transient Renters' – 32% would pay more.

City Prosperity

High status city dwellers living in central locations and pursuing careers with high rewards

City Prosperity work in high status positions. Commanding substantial salaries they are able to afford expensive urban homes. They live and work predominantly in London, with many found in and around the City or in locations a short commute away. Well-educated, confident and ambitious, this elite group is able to enjoy their wealth and the advantages of living in a world-class capital to the full.

Prestige Positions

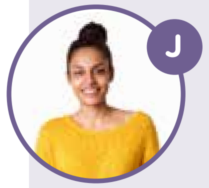
Established families in large detached homes living upmarket lifestyles

Prestige Positions are affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children.

Country Living

Well-off owners in rural locations enjoying the benefits of country life

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.



Transient Renters

Single people privately renting low cost homes for the short term

Transient Renters are single people who pay modest rents for low cost homes. Mainly younger people, they are highly transient, often living in a property for only a short length of time before moving on.

Rental Hubs

Educated young people privately renting in urban neighbourhoods

Rental Hubs contains predominantly young, single people in their 20s and 30s who live in urban locations and rent their homes from private landlords while in the early stages of their careers, or pursuing studies.

THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Findings

EXISTING HOMES 2

Part 2: UK homeowner and renter's existing homes

This part of the survey demonstrates how UK homeowners and renters feel about their current homes. We asked how satisfied people are with their current homes generally, how they would describe their current homes, and the top three issues they would change if they could.

The questions asked in Part 2 of the UK Home, Health and Wellbeing Report

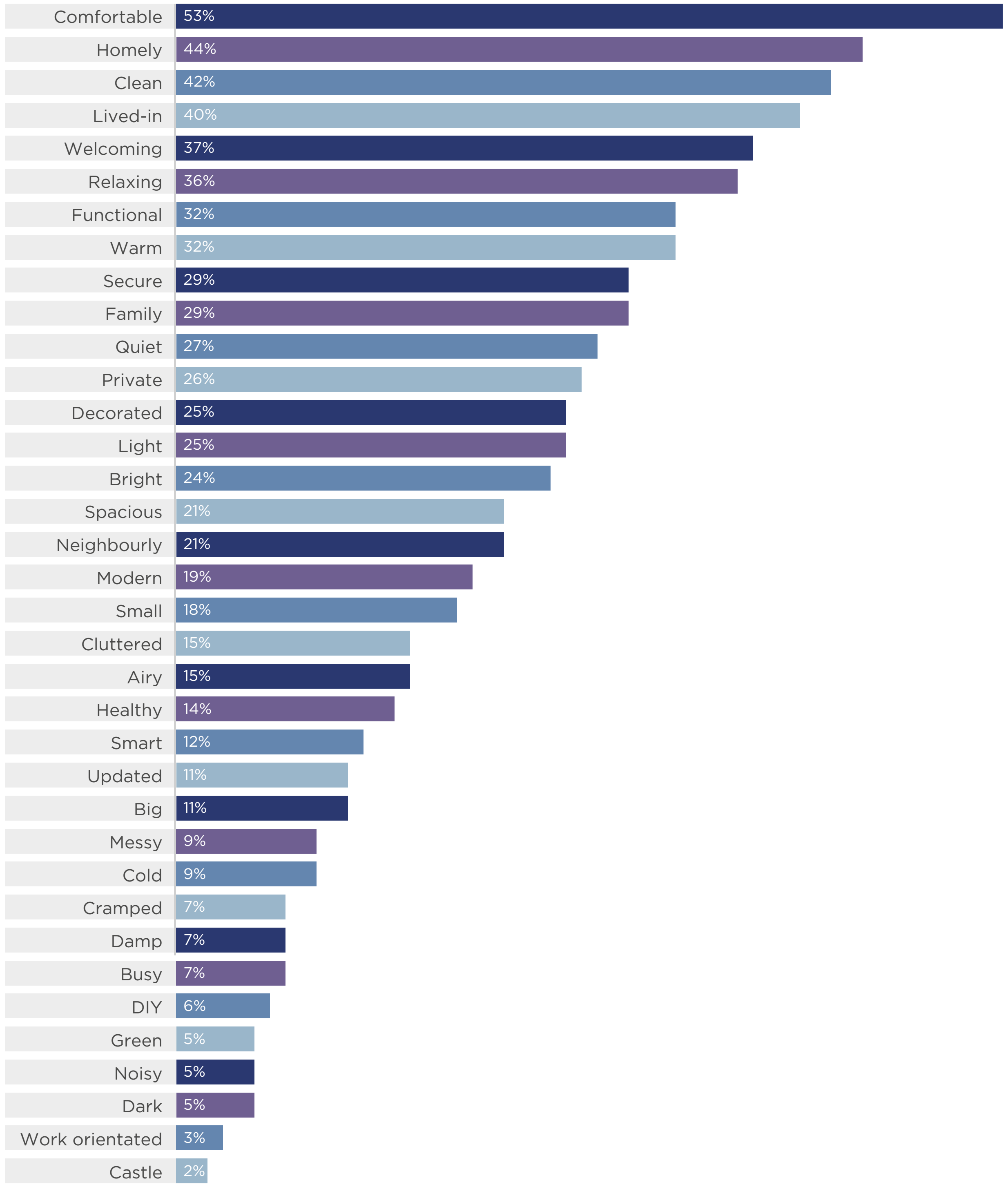
- What words would you use to describe your own home?
- How satisfied are you with your home?
- What, if at all, are the top three issues you have with your home that you would like to change?






How UK homeowners and renters describe their own homes

The results below shows the overall results from all 3,024 UK homeowners and renters when asked what words describe their current homes. When asked about their home, the most frequently mentioned descriptors and adjectives are positive in nature, in particular, reflecting the home as a comfortable, clean, welcoming and a relaxing living space.



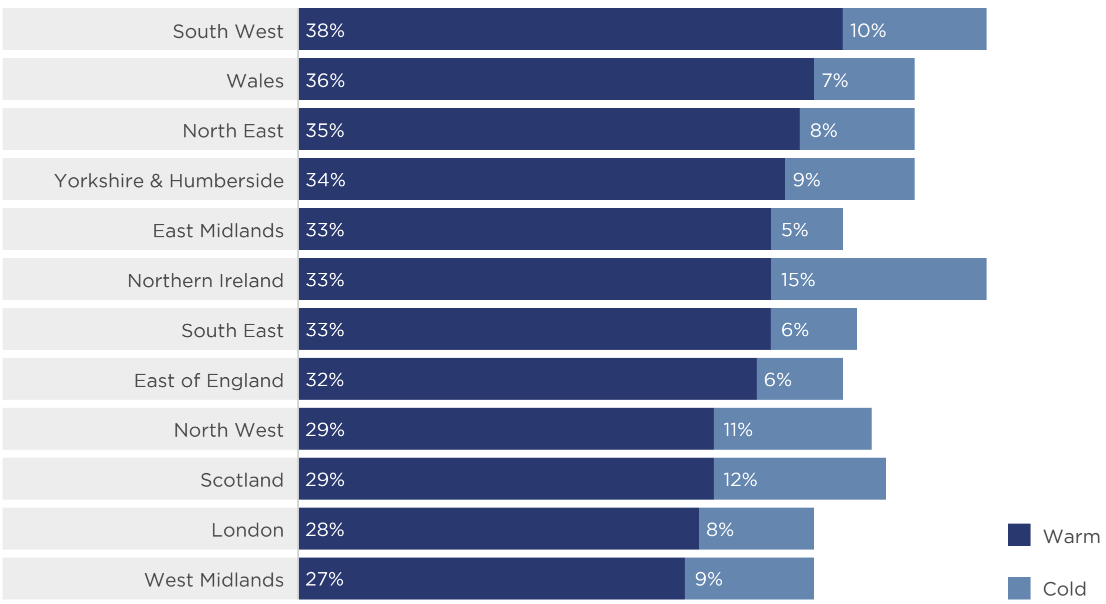
The Chart below shows the top 10 descriptors used by homeowners and renters to describe their homes, where there are some key differences between the two groups:

Homeowners	Top 10 Descriptors	Renters
Comfortable	1	Comfortable
Homely	2	Homely
Clean	3	Clean
Welcoming	4	Lived-in
Lived-in	5	Functional
Relaxing	6	Welcoming
Warm	7	Relaxing
Secure	8	Warm
Family	9	Secure
Functional	10	Family

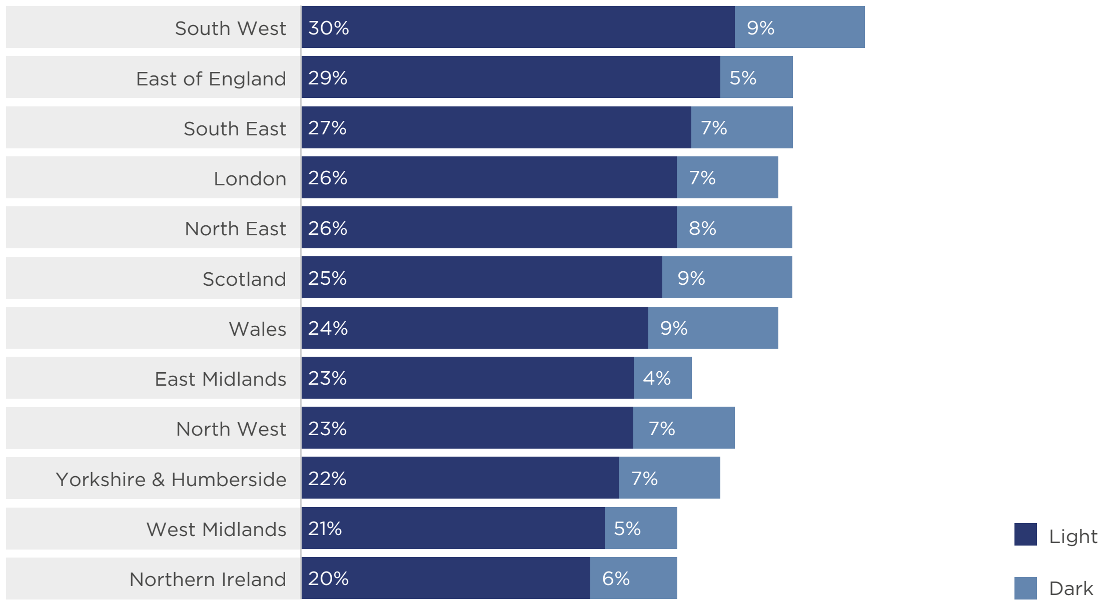
Whilst overall the top ten descriptors remain the same for homeowners and renters when they describe their own homes, outside of the top three (comfortable, homely and clean) the order changes depending on the respondent group. The key difference being for renters, that their home being functional is the 5th most frequently cited descriptor, whereas it is only the 10th most frequent for homeowners.

Overall, the more negative descriptions and adjectives, such as noisy, dark, damp, cramped, cold, etc were generally less frequently mentioned. One key finding from this part of the research was that 9% of all respondents in purpose built flats, described their current homes as noisy, considerably more than in any other house type.

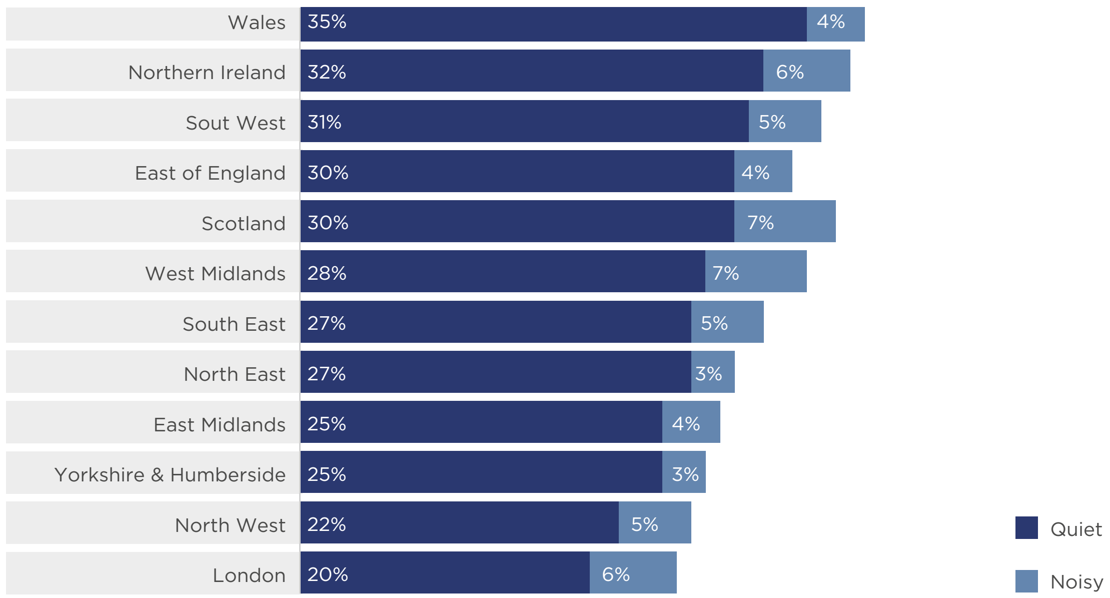
5% of respondents in the East Midlands used the word **Cold** to describe their homes. This is a third of the **15%** in Northern Ireland.



20% of those in Northern Ireland described their home as **Light,** whereas it's **30%** in the South West



The survey found that the word **Quiet** was used to describe the home **75%** more in Wales than in London



Top 3 things homeowners and renters would change

88% of those surveyed reported issues they'd like to change with their current home.

This research shows that there is a reasonably high appetite for home improvement and making changes to the home in order to address existing issues or problems for UK homeowners and renters. Only a small minority of respondents could not highlight any areas to improve, as 88% of those surveyed reported issues they would like to change with their current home. In addition to the matters of redecoration, a new kitchen and/or bathroom, the top health and wellbeing issues in their existing homes they would like to change, are: homes that are too cold in the Winter, with high energy bills and noise from neighbours.

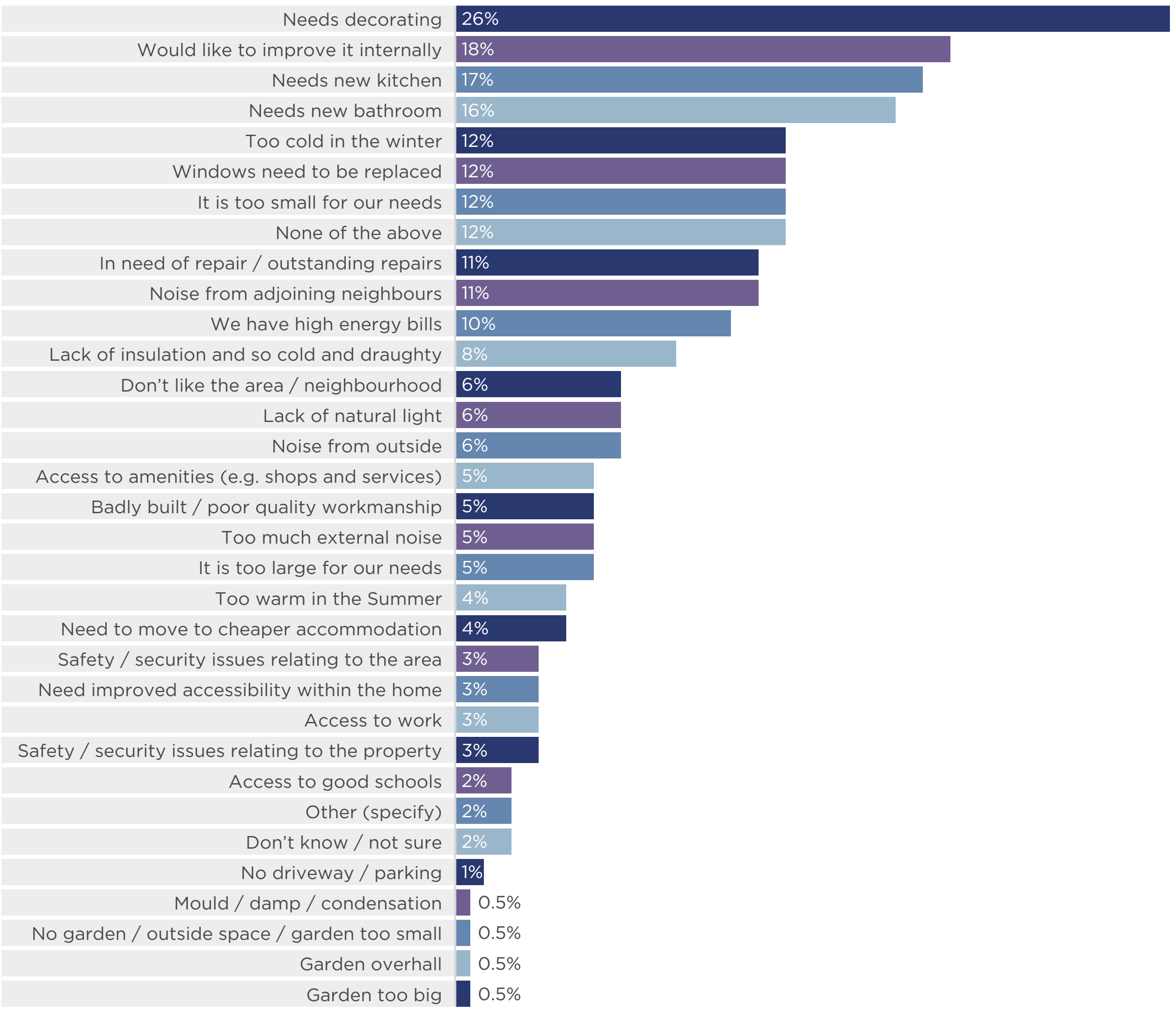
Top 3: Health and wellbeing issues in their existing homes they would like to change were:

It has high energy bills

It is too cold in the winter

There is noise from neighbours

Full list of issues — all respondents

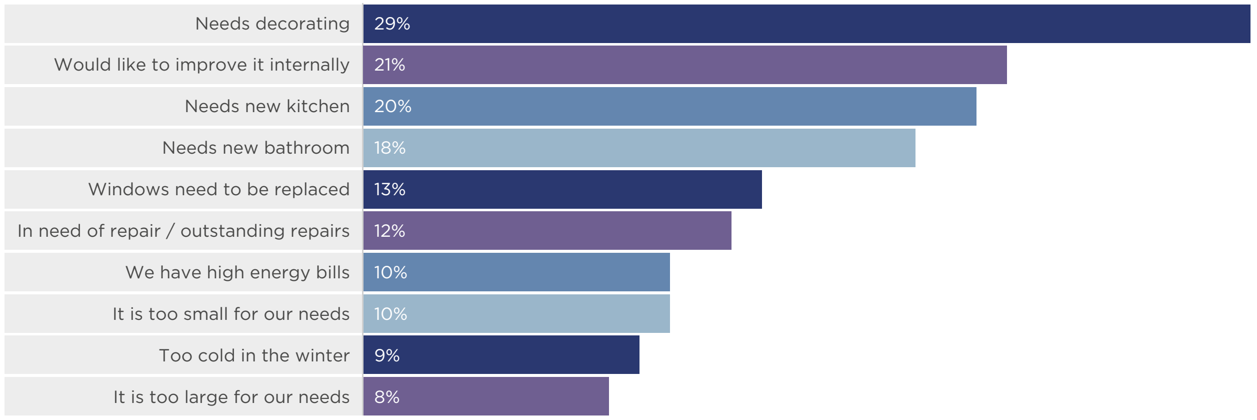


The analysis below shows that renters cited the issue of 'homes that are too cold in the Winter' more than twice as frequently as homeowners. The next two issues in terms of nuisance noise and high energy bills were also worse for renters rather than homeowners

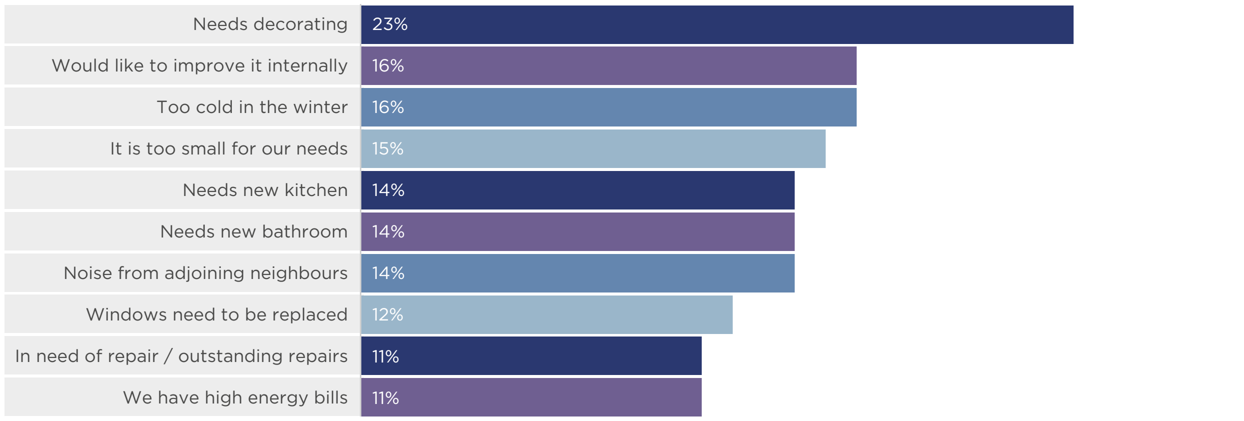
		%	
TOP 3: Health and wellbeing issues	Owner	Renter	All
Too cold in the Winter	9%	16%	12%
Noise from adjoining neighbours	8%	14%	11%
We have high energy bills	10%	11%	10%
Lack of insulation and so cold and draughty	5%	11%	8%
Lack of natural light	6%	7%	6%
Noise from outside	5%	7%	6%
Too much external noise	4%	6%	5%
Too warm in the Summer	3%	6%	4%

The tables below show the top ten issues faced by homeowners and renters. The issues are very similar, but the importance differs. The homeowners report more decorative/improvement issues slightly higher than building performance whereas the renters scored issues of cold and high energy bills higher than new kitchen and bathroom.

Top ten issues reported by owners



Top ten issues reported by owners



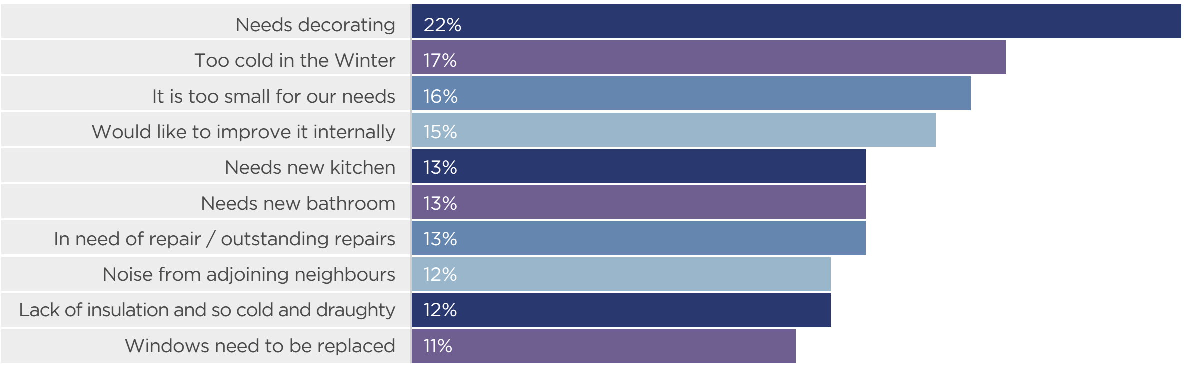
The rental market can be further segmented between private and social. Both segments reported issues of cold highly but it was the private renters who rated it as their top issue after decoration. The research found that noise from adjoining neighbours was very slightly more of a problem than the home being too cold in the winter for the social renters.

Top ten issues reported by private renters

17% of private renters report that their homes are too cold in the winter

12% also reported that noise from adjoining neighbours was an issue they'd like to change about their current home

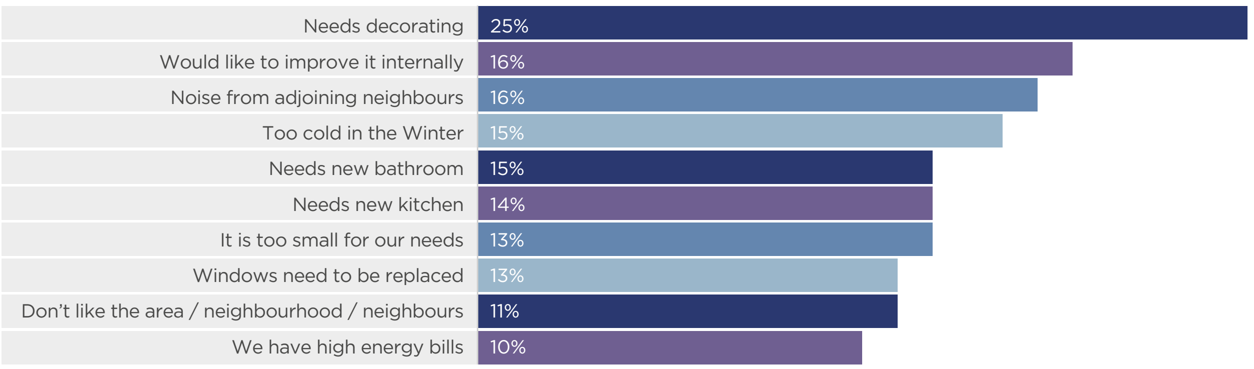
12% said that their current homes lacked insulation so were cold and draughty



Top ten issues reported by social renters

16% of social renters said that their current home suffers because of noise from adjoining neighbours

15% reported that their current home was too cold in Winter



Satisfaction of UK homeowners and renters with their homes

Our research shows that overall, satisfaction of UK homeowners and renters with their current home is generally high, with more than three-quarters 'satisfied' (77%), including almost a quarter of those being 'very satisfied' (24%).

Overall satisfaction increases for homeowners (87%) compared to renters (66%). However, the percentage of renters who are 'very satisfied' is only half that of the owners. In addition, the number of renters who are dissatisfied is almost four times higher than those that own (11% vs 3%).

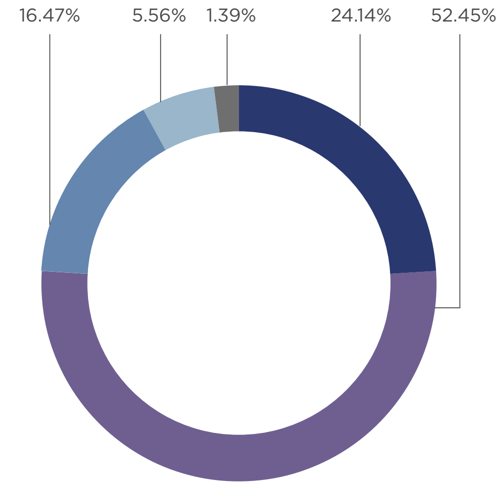
UK homeowners and renters in detached houses, town houses and bungalows are the most satisfied with their current home. Those in flats, especially converted flats or terraced homes are the least satisfied with their current home.

The over 65's age group of UK homeowners and renters are at least twice as likely to be very satisfied with their homes than most of the other age groups. They are also the least likely to be dissatisfied with their homes.

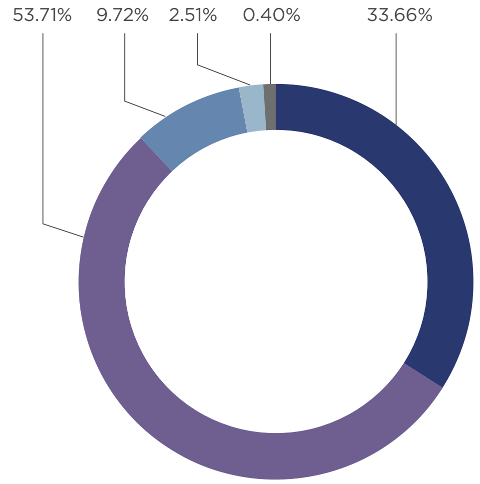
Question

Overall, how satisfied are you with your home?

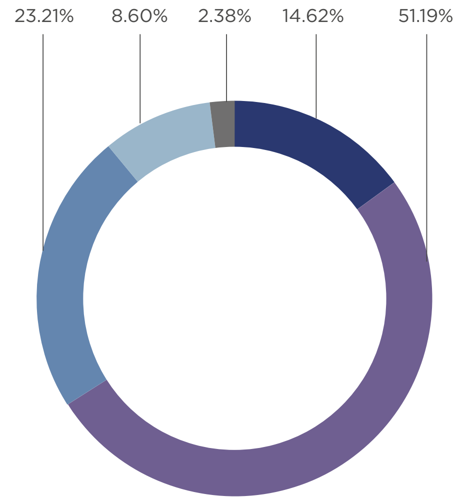
Response by all groups



Response by owners



Response by renters

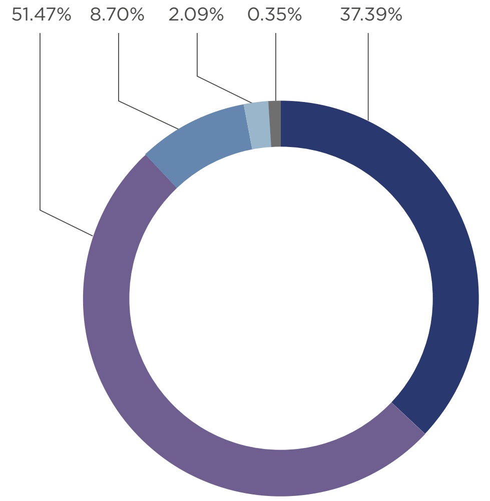


- Very Satisfied
- Satisfied
- Neither satisfied or dissatisfied
- Fairly dissatisfied
- Dissatisfied

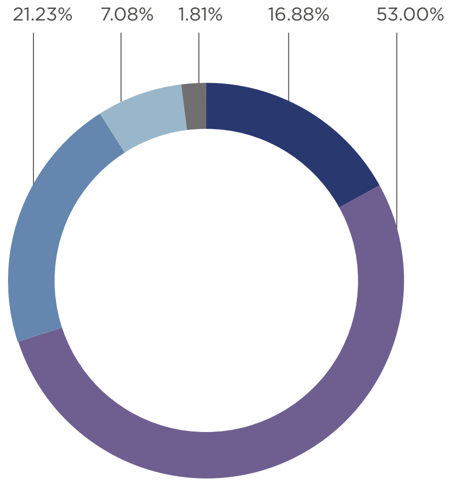
There are some clear differences looking at levels of satisfaction of house type. Homeowners and renters that live in detached houses scored the highest percentage of 'very satisfied', in fact double of those living in both purpose built and converted flats.

When looking at those who are 'very dissatisfied' with their current home, we see that those living in converted flats are most likely to rank their current home in this way over other home types. Grouping homeowners and renters who are 'fairly dissatisfied' and 'very dissatisfied' together, we see that purpose built and converted flats score the worst with 8.9% and 13.3% respectively. This is in stark contrast with only 2.4% of those in detached homes being 'very dissatisfied'.

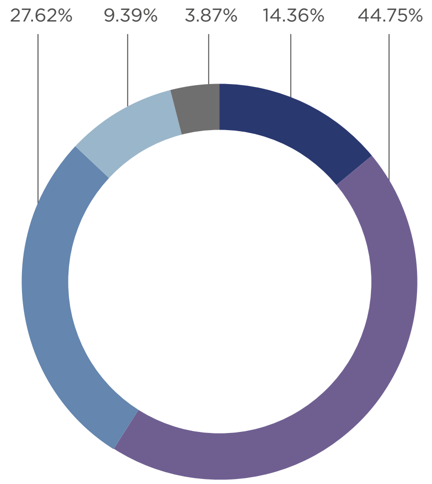
Response by house type: Detached



Response by house type: Purpose built flat



Response by house type: Converted flat



- Very Satisfied
- Satisfied
- Neither satisfied or dissatisfied
- Fairly dissatisfied
- Dissatisfied











THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

Findings

IDEAL HOME 3

Part 3: UK homeowner and renter's ideal homes

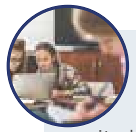
Part 3 of the research surveyed the 3,024 UK homeowners and renters to find out what their respective priorities are when it comes to their ideal home. Each respondent was faced with a list of 35 attributes. Twenty-five of these were generated by The UK Green Building Council Healthy Homes Task Group. This Task Group reviewed the evidence on the links between health and wellbeing and the design of homes and neighbourhoods. From this content we were able to present a summary list of twenty-five individual attributes or factors of what could influence a healthier home and neighbourhood.

The remaining 10 items were the attributes typically cited by people when describing what they looked for in a home. We were interested to find out, of all the 35 attributes together, which received priority – the typical attributes or those that can improve people's health and wellbeing?

The 35 attributes of an ideal home:

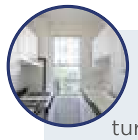
The 25 health and wellbeing attributes


A home where you're not disturbed by noise from neighbours or outside


A home where you're not disturbed by noise from others inside the home or its heating system/appliances


A home environment that protects you from outdoor pollution

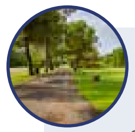

A home environment with safe levels of indoor pollution (e.g. carbon monoxide, formalehyde, dust mites etc.)


A home with plenty of natural light, no need to turn lights on during the day


A home environment with no condensation, dampness or mould


A home that's warm indoors without the need for excessive heating in the Winter


A home that's cool indoors without the need for air-conditioning in Summer


A home that is close to outside space to exercise or has nearby exercise or leisure facilities


A home that helps you relax and unwind


A home where I have views of nature and greenery


A home where I feel safe and secure


A home environment that promotes healthy sleep


A home with flexible internal space allowing family and friends to share time together


A neighbourhood where children can play outside safely


A home where I have access to fresh, locally grown food


A home that facilitates interaction with neighbours and the community


A place that will adapt with you and your family as we age or our needs change


A home with the provision of well-maintained communal spaces


A home that has good access to transport


A home that I can afford to run and maintain


A home that is resilient to changes in weather patterns or temperature


A fully digital, wireless home


A home that is energy efficient with low utility bills

These factors are represented in the results below — in blue text

The ten traditional attributes:


A home that is close to my work


A home that has off-street parking/garage


A home with a south-facing garden


A home that is close to the shops, pubs, bars and restaurants


An older home that has lots of character


A newer home that is modern and low maintenance


A home that will improve in value and will have desirability when sold


A home that is not overseen and looked in to by neighbours


An area that has low or no crime


A home that is in a desirable postcode location


A home that is in the catchment area of a good school

These factors are represented in the results below — in purple text

Max-Diff Methodology (Maximum Difference Scaling)

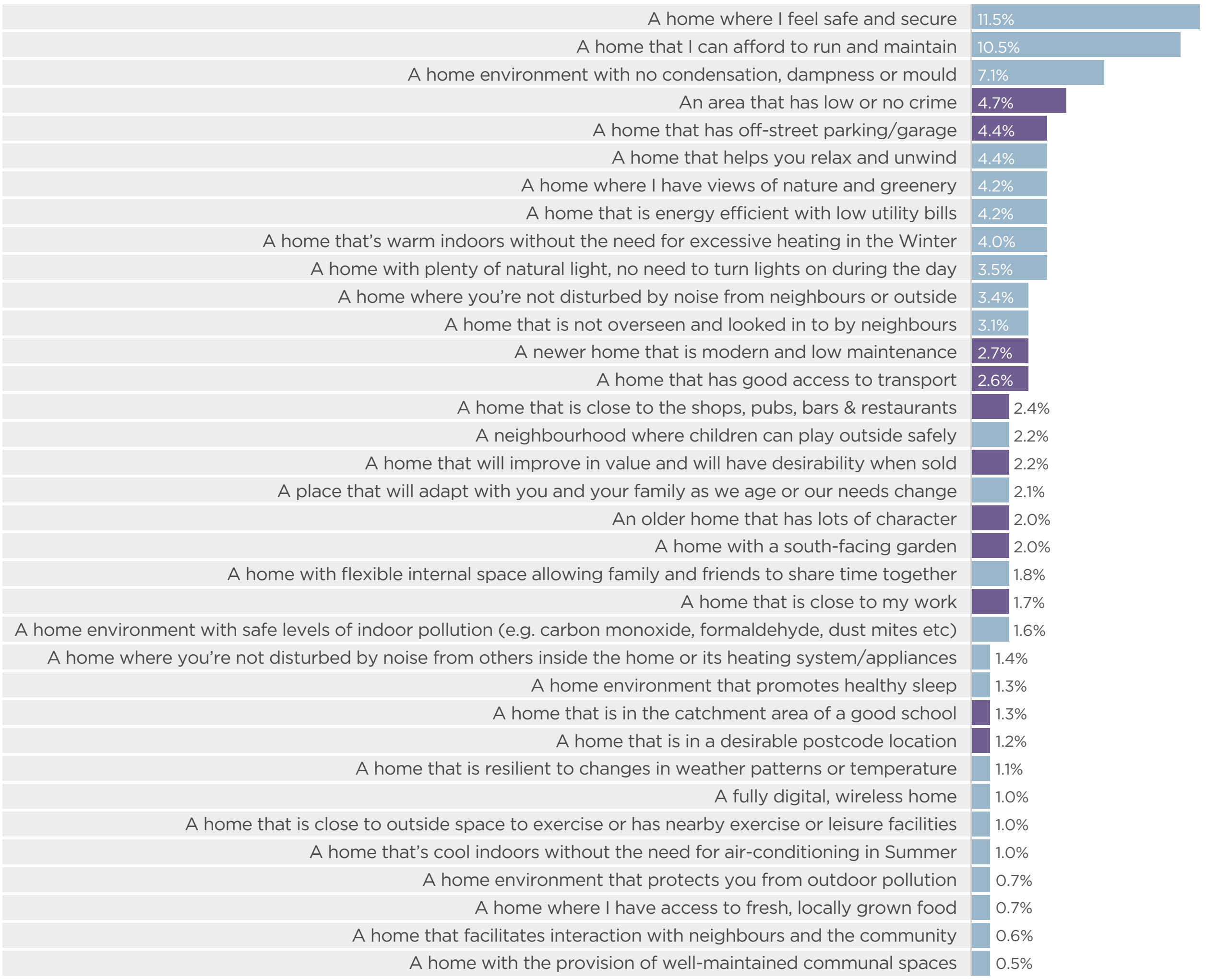
MaxDiff is a form of trade-off analysis used in market research to obtain important scores for multiple statements. For the purpose of this research, 35 statements were used covering factors relating to the question; **Thinking of your ideal home environment, which one of the following statements describe it the most and which one the least?**

Within the Max-Diff analysis questioning, respondents were shown a series of screens each comprising a subset of the statements being traded-off. In the survey, each respondent viewed 14 screens with five statements. Each of the 35 statements were shown twice, with each one containing a different subset of items. For each subset, the homeowners and renters were asked to indicate which statement described their ideal home the most, and which one the least.

The goal in using Max-Diff is to achieve the relative importance scores between items. Each statement is given an equal importance score at the beginning, 1/35 number of statements, the equivalent of 2.86%, this is the average. The initial importance scores changed after respondent selections, which assigned a final importance score to each statement. The higher the score, the higher the relative importance of the statement, compared to the average 2.86%.

Question

Thinking of your ideal home environment, which one of the following statements describe it the most and which one the least?



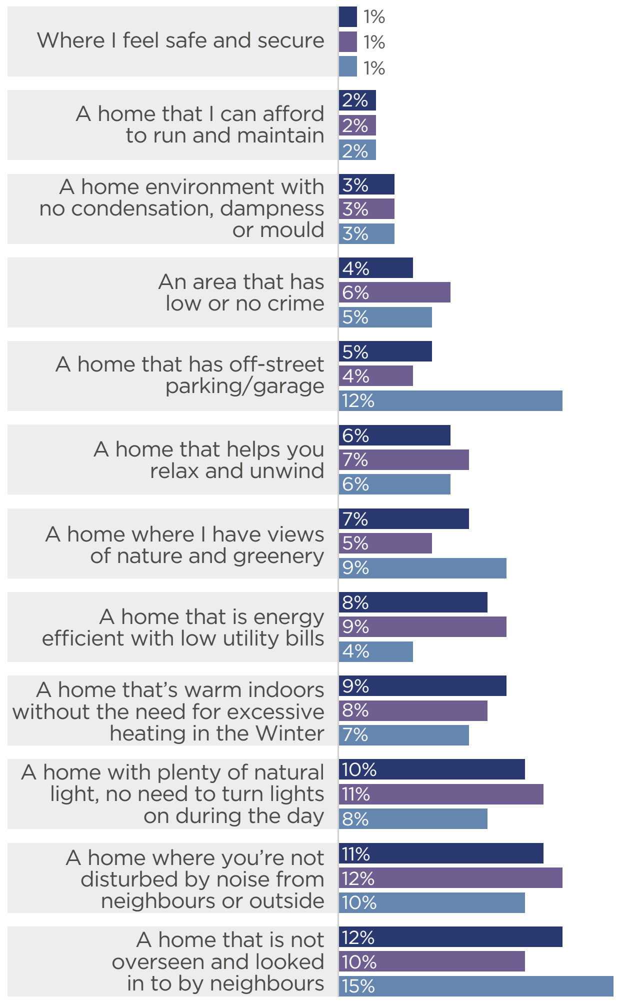
Differentiating/significantly more important than any other statement in the given set........................5.7% or higher
Important but not significantly.. 2.9% or higher and <5.7%
Unimportant or less important than estimated.. <2.9%

If we look at the results where statements are rated as important (i.e. above the average score of 2.86%), the top 12 ideal home factors are as follows:

1. A home where I feel safe and secure 11.5%
2. A home that I can afford to run and maintain 10.5%
3. A home environment with no condensation, dampness or mould 7.1%
4. An area that has low or no crime 4.7%
5. A home that has off-street parking/garage 4.4%
6. A home that helps you relax and unwind 4.4%
7. A home where I have views of nature and greenery 4.2%
8. A home that is energy efficient with low utility bills 4.2%
9. A home that's warm indoors without the need for excessive heating in the Winter 4.0%
10. A home with plenty of natural light, no need to turn lights on during the day 3.5%
11. A home where you're not disturbed by noise from neighbours or outside 3.4%
12. A home that is not overseen and looked in to by neighbours 3.1%

Differences between homeowners and renters

Looking at the research data across the splits of homeowners and renters, there is little difference in the rankings between their overall rated importance scores. The rental market shows slightly more variation in priorities, rating 'energy efficient' in 4th vs 8th overall and off-street parking rated 12th vs 5th overall compared to homeowners.



Ideal Home Attributes - Differences by Geographic Region

Regionally, across the 12 'above average' statements we see a strong connection between the regions and their views toward what makes the ideal home. There are a few notable differences in homeowner and renter's opinions:

- Londoners rate access to transport more importantly in 6th vs. 14th overall whilst being overlooked is rated 18th compared to 12th overall
- North Westerners rate 'warm indoors without the need for excessive heating in the Winter' in 4th compared to 9th overall
- West Midlands and Northern Irish respondents rate 'off-street parking' as less important in 11th and 14th respectively compared to 5th overall
- The Scots also 'off street parking' 11th compared to 5th overall, plus they rate views of nature in 12th less important, compared to 7th overall.
- In Northern Ireland we see 'a neighbourhood where children can play outside safely' rated more importantly in 6th vs 16th overall. Of the 23 lesser 'important' factors, 10 statements differ to the overall ranking by 5 positions or more (7 in an upward movement).

Differences between North and South

The data also reveals some North/South differences in factors making an ideal home for homeowners and renters. A 'desirable postcode', 'off-street parking' and 'views of nature' are of greater preference or aspiration from those surveyed in the South. Factors such as 'affordability to run', 'being warm indoors', and 'without mould', feature as higher preferences from those surveyed in the North. Looking at the regional angle we can see below any significant differences between them:

East Midlands	A home that I can afford to run and maintain	12.3%
East of England	A home that has off-street parking/garage	6.0%
London	A home that has good access to transport	4.5%
North East	None	
North West	A home that's warm indoors without the need for excessive heating in the Winter	4.9%
Northern Ireland	A home environment with no condensation, dampness or mould	11.3%
	A neighbourhood where children can play outside safely	4.6%
Scotland	A home that I can afford to run and maintain	11.8%
South East	A home that has off-street parking/garage	6.0%
South West	A home where I have views of nature and greenery	5.7%
Wales	A home where I have views of nature and greenery	6.2%
West Midlands	None	
Yorkshire & Humberside	None	

Differences between Women and Men

There is very little variation within the top 12 factors across gender. Males rate 'energy efficient with low utility bills' in 6th, so two places higher than overall. Women rank 'a home where children can play outside safely', 'within the postcode of a good school' and 'a home with flexible internal space allowing family and friends to share time together' typically higher than male respondents.

Male	A home that is energy efficient with low utility bills	4.6%
	A home that's warm indoors without the need for excessive heating in the Winter	4.4%
	A home where you're not disturbed by noise from neighbours or outside	3.8%
Female	A home where I feel safe and secure	12.5%
	A home environment with no condensation, dampness or mould	7.4%

Difference by Age Group

There are some noticeable differences from UK homeowners and renters across the different age groups of respondents. Respondents over 50 rate a home where they feel 'safe and secure' and a home that they can 'afford to run and maintain' as four times more important than the average (2.86%) factor score – at 12% each. The next important factors for an ideal home for homeowners and renters over 50 include a home with 'views of nature and greenery', a home that's 'warm in Winter' 'without the need for excessive heating in Winter', a home with 'low energy bills' and a home with 'off-street parking' – all at almost 5% or above.

Under 50	A neighbourhood where children can play outside safely	3.2%
	A newer home that is modern and low maintenance	2.9%
Over 50	A home where I feel safe and secure	12.0%
	A home that I can afford to run and maintain	12.0%
	A home where I can have views of nature and greenery	5.4%
	A home that has off street parking / garage	5.1%
	A home that is energy efficient with low utility bills	5.1%
	A home that's warm indoors without the need for excessive heating in the Winter	4.9%
	A home with plenty of natural light, no need to turn lights on during the day	3.9%
	A home where you are not disturbed by noise from neighbours or outside	3.6%
	A home that is not overseen and looked in to by neighbours	3.6%

Ideal Home by Mosaic Group

The Max-Diff analysis across Mosaic groups identifies some interesting insights when looking at features.

Health and wellbeing features do not appear in the majority across the groups, with ‘safety and securing’ being prevalent. ‘Safe play areas for children’ also appear.

Standard home features, such as good access to transport and a ‘home that has off-street parking’, are seen as most important.

Health and wellbeing features are the most significant categories with the themes of ‘views to nature’, ‘not being overlooked’ and ‘a home that helps you unwind’ being the most popular.

Vintage Value and Transient Renters value a home that helps them with the cost of running a home, through energy efficiency, low heating and lighting costs.

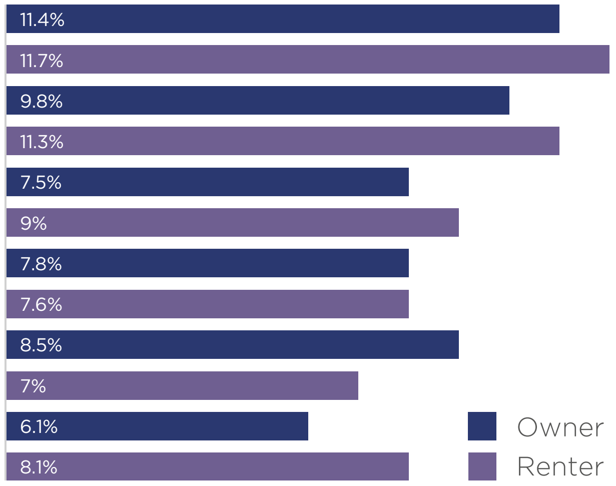
		% Share
City Prosperity – **A**	A home that has good access to transport	5.3%
	A home that helps you relax and unwind	4.7%
	A home that is close to the shops, pubs, bars and restaurants	4.0%
Prestige Positions – **B**	A home where I feel safe and secure	12.5%
	A home that has off-street parking/garage	6.1%
	An area that has low or no crime	5.8%
	A home that helps you relax and unwind	4.7%
	A home that will improve in value and will have desirability when sold	4.2%
	A home that is not overseen and looked in to by neighbours	3.9%
	A home with a south-facing garden	2.9%
Country Living – **C**	A home where I have views of nature and greenery	15.6%
	A home that is not overseen and looked in to by neighbours	6.7%
	A home that helps you relax and unwind	4.7%
	An older home that has lots of character	4.0%
	A home with a south-facing garden	3.4%
Rural Reality – **D**	A home where I feel safe and secure	12.6%
	A home where I have views of nature and greenery	5.9%
	An area that has low or no crime	5.9%
Senior Security – **E**	A home that I can afford to run and maintain	12.6%
	A home where I feel safe and secure	12.5%
	A home that has off-street parking/garage	7.6%
Suburban Stability – **F**	A home where I feel safe and secure	13.2%
	A home that has off-street parking/garage	7.0%
	A home that helps you relax and unwind	5.0%
Domestic Success – **G**	A home that has off-street parking/garage	6.4%
	A home that helps you relax and unwind	4.5%
	A home that is not overseen and looked in to by neighbours	3.9%
	A home that will improve in value and will have desirability when sold	3.1%
Aspiring Homemakers – **H**	A home where I feel safe and secure	12.2%
	A home that helps you relax and unwind	4.5%
Family Basics – **I**		
Transient Renters – **J**	A home that’s warm indoors without the need for excessive heating in the Winter	6.3%
	A home that is energy efficient with low utility bills	5.2%
	A neighbourhood where children can play outside safely	3.0%
	A home that has good access to transport	2.9%
Municipal Challenge – **K**	A home that helps you relax and unwind	4.5%
	A home that has good access to transport	4.0%
Vintage Value – **L**	A home that I can afford to run and maintain	14.5%
	A home where I feel safe and secure	13.4%
	A home that is energy efficient with low utility bills	5.8%
	A home with plenty of natural light, no need to turn lights on during the day	5.2%
	A home that helps you relax and unwind	4.7%
	A home that has good access to transport	3.9%
Modest Traditions – **M**	A home that I can afford to run and maintain	13.3%
	A home where I feel safe and secure	12.6%
	A home that helps you relax and unwind	4.7%
	A neighbourhood where children can play outside safely	3.9%
Urban Cohesion – **N**	A home where I feel safe and secure	12.6%
	A home that has good access to transport	4.2%
Rental Hubs – **O**	A home that helps you relax and unwind	4.6%
	A home that is close to the shops, pubs, bars and restaurants	3.9%
	A home that has good access to transport	3.3%
	A newer home that is modern and low maintenance	3.3%

Health and wellbeing features

Standard homebuying features

In summary, the following areas stand out as significantly higher priorities when it comes to the ideal home environment. What is also interesting with the above factors being valued the most is that each of these factors are valued as three times more important than a home that will improve in value or have desirability when sold, which is typically believed as a key driver of consumer choice on a place to live.

Most valued factors	%
Where they feel safe and secure	11.5%
That they can afford to run and maintain	10.5%
Without the need for excessive heating in Winter and low energy bills	8.2%
With low levels of noise giving a place where you can relax and unwind	7.7%
With good natural light and views of nature	7.7%
Without damp and mould	7.1%








THE UK **HOME, HEALTH** AND **WELLBEING** REPORT **2016:**

My thoughts

90% of people want a home that doesn't compromise their wellbeing

My thoughts...

Saint-Gobain Healthy Homes research findings

Submitted by...

Dr Marcella Ucci

UCL

I know my stuff because...

I'm a Senior Lecturer in Environmental and Healthy Buildings at the UCL Institute for Environmental Design and Engineering, at The Bartlett Faculty of the Built Environment, UCL. My research explores the interactions and tensions between sustainable building design/operation and the needs of occupants in terms of comfort, health and wellbeing.

My interests and expertise are...

My areas of expertise include building monitoring and modelling, health impact of buildings (especially biological such as dust mites), application of epidemiological methods to built environment studies, and operational aspect of buildings — particularly occupant behaviour.

In my opinion, the most interesting aspect of this survey is that 90% of the respondents want a home that does not compromise their health and wellbeing and that overall, this figure does not seem to change dramatically across market segments (i.e. mosaic groups).

But what's also interesting is the remaining 10% who state they are 'not concerned about what impact a home would have on me'.

By and large, the proportion of those not concerned about this aspect does not change dramatically across different tenures, ages, or gender. There are small differences across regions (from 7% in South East and Wales, to 15% in North East) and there's a small reduction in the proportion of 'not concerned' as income increases.

Of the 90% who want a home that does not compromise their health and wellbeing, around a third would pay more and on further inspection, this seems to be linked to socio-economic factors such as social grade and income. The higher the income, the larger proportion of those willing to pay more, and conversely, those on lower incomes were less likely.

To investigate this relationship further, it would be interesting to explore whether the issue here is lack of affordability or lack of desire. There is also a similar relationship between income and concern about the effect of the home on their health and wellbeing — again, some could be studied in more detail.

Healthy home vs current home and health

Perhaps surprisingly, the proportion of those willing to pay more for a healthy home does not vary dramatically depending on the respondent's satisfaction levels with their own health.

Some features of their existing home may affect respondents' willingness to pay more and their overall concern/interest in a healthy homes – for instance, of those stating that their home is warm or healthy, respectively 38% and 37% are willing to pay more (as opposed to 30% for the whole sample) . What should also be considered however is whether this relationship is due to the quality of their current home and/or the effect of their income and socio-economic status.

The tenure type also seems to be a further factor, with the proportion of those willing to pay more dropping to 21% for social renters, compared to owners or private renters at around 30%.

Interestingly, however, 67% of social renters still want a home that does not compromise their health and wellbeing (although are not willing to pay more for it), which is higher than the corresponding 60% (approx.) for the other tenures. Again, this suggests that the proportion of those willing to pay more is affected by perceived affordability, rather than simply by the perceived 'intrinsic value' of a healthy home.

Overall, the responses to the question on the perceived impact of the home on one's own health and wellbeing, and corresponding willingness to pay 'more', indicate that such willingness is strongly affected by actual, or perceived, affordability. To explore this area further, it would be valuable to ask respondents to quantify how much more they would be willing to pay and compare those results to the respondents' disposable income.

It would also be valuable to consider what respondents are willing to pay versus their education level – something that's not currently explicitly captured in this questionnaire.

In summary, within this sample, the vast majority (90%) of the respondents want a home supportive of their health and wellbeing, at least a third would pay more for this, and it is likely that the proportion of those willing to pay more could be greater, if this is perceived as affordable.

It is also worth noting that 85% of those willing to pay more for an environmentally-friendly home would also be willing to pay more for a home supportive of health and wellbeing. By contrast, 47% of those willing to pay more for a healthy home would also be willing to pay more for an environmentally friendly home.

Regardless of willingness to pay more, however, only a small proportion (2 — 4%) of those who want an environmentally-friendly home are not concerned about the impact a home would have on them. This indicates that there is significant synergy, in terms of home desirability and marketability, between environmental, and health and wellbeing features.

*Disclaimer: The comments above were based on evaluation of descriptive data only. No inferential statistics tests were carried out. It is also noted that some questions include answers with small number of respondents – for these especially, the results would need to be taken with particular caution.

The importance of views of nature and greenery

My thoughts...

Saint-Gobain Healthy Homes report

Submitted by...

Clare Murray, Head of Sustainability, Levitt Bernstein

Levitt Bernstein People.Design

I know my stuff because...

I specialise in sustainable building design and I'm responsible for improving the environmental performance of all of our work at Levitt Bernstein. As well as overseeing all projects from concept through to implementation and post-occupancy, I also contribute to research and campaign to ensure sustainability is a key issue within design and planning policy.

My interests and expertise are...

I champion for new buildings to be sustainably designed using a holistic approach and believe there is more to sustainable design than carbon emission reductions. The future of sustainable design is to integrate measures without the need for expensive bolt-on technologies.

The health benefits of being close to nature were highlighted by the UK-GBC Health and Wellbeing in Homes report , where it found that a "connection with nature can affect cortisol levels, pulse rates, blood pressure, glucose levels, and the serotonin-melatonin balance which in turn can affect mood and energy levels".

With these findings in mind, it's now particularly interesting to see a correlation in the results of the Saint-Gobain Healthy Homes research, with participants suggesting that their ideal home environment would have views of nature and greenery.

In fact, this feature ranked within the top ten overall, but those who valued it the most were the over 50s who placed it within their top five, and it was of particular significance for those over 65.

The younger generations of 18 — 44 year olds placed greater value on having a neighbourhood where children can play outside safely. 18 — 34 year olds rated this feature higher than views of nature, and 25 — 34 year olds ranked this feature at number 7 as opposed to number 16 when all age groups are considered.

As might be expected, women, parents and those at a life stage where children are living at home tended to rate this feature higher than others, but that is not to say that others didn't choose this feature, it just has much lower significance. It's also curious to think how children may have ranked these two questions if asked.

From the results of the survey there is a distinct opportunity to connect views of external green spaces with areas of safe and easily accessible play to suit all life stages. Linking homes and people with the visual comfort provided by views of nature, while allowing children the independence to experience it, should continue be a priority for the homes we design and build in the future.

The increasing consumer demand for healthier homes

My thoughts...

Saint-Gobain Healthy Homes report

Submitted by...

Jo Wheeler, Senior Sustainability Advisor

UK GREEN BUILDING COUNCIL Member

I know my stuff because...

I've worked for the UK-GBC for the last nine years as a sustainability advisor. Prior to this I was with WWF-UK working on briefs ranging from toxic chemical usage to One Million Sustainable Homes.

My interests and expertise are...

My background is in sustainable development and I've worked in the field of buildings and urban policy for over 10 years both in the UK and internationally. I'm also a keen traveller.

We're just beginning to understand the significance that our homes and neighbourhoods have on our physical and mental wellbeing, so I welcome research like this from Saint-Gobain as it provides new insights on what consumers think about this issue

The findings make very interesting reading. The growing awareness of and interest in health and wellbeing in the public consciousness is very encouraging to see, and also that people are now prepared to pay more for their homes if they will have a positive impact. For industry, this gives a strong sign of real market demand.

The Saint-Gobain report helps aid our understanding of what people want and need from their homes, and I hope it's the start of more research in this area. With pressure to build more homes, it's vital that we better understand householder needs to make sure our homes are truly fit for purpose.

As our UK-GBC study has found, well designed homes and communities positively influence the lives of the people that live there. As an industry, we're increasingly aware of this connection, and, as this report shows, the people buying and renting homes are also switching onto this idea too.

Saint-Gobain
Saint-Gobain House
Binley Business Park
Coventry CV3 2TT
Tel: +44 (0)24 7643 8400
Fax: +44 (0)24 7643 8401

www.saint-gobain.co.uk
@SaintGobainUK

Issue Number: 1
Issue Date: March 2017
Code: SGUKI-HHWR-1601