

Public opinion on housing and development

September 2023

Fieldwork Dates 6/9 - 11/9
N = 2,500 adults in England

Executive Summary

I **The public want more affordable housing and a plurality support building it in their area**

- I Respondents had a limited understanding of the policy definition of “affordable housing” with only 14% identifying it correctly and most conflating it with social housing.
- I Despite this, 62% of those who want to own a home think that more affordable housing being built would help them to buy. 45% of the public, including 42% of homeowners, would support more affordable housing being built in their local area.

I **People can be persuaded to support building on greenfield land and the Green Belt**

- I In line with previous research we find that the public are opposed to the idea of building on greenfield land or the Green Belt (-6% Net support). However, when presented with statements explaining potential benefits of building on this type of land we find that public opinion shifts; with reductions in opposition and increases in support.
- I Respondents were told that: building on the Green Belt can drive economic growth (+7% Net support); building on greenfield and the Green Belt can supply more affordable housing (+9% Net support); and that building on the Green Belt can increase biodiversity and access to green spaces (+11% Net support).
- I Younger people are more persuaded by an argument about increasing affordable housing stock, while older people are more convinced by an argument related to biodiversity.

I **When thinking about their ideal home, people don't care what type of land it is built on**

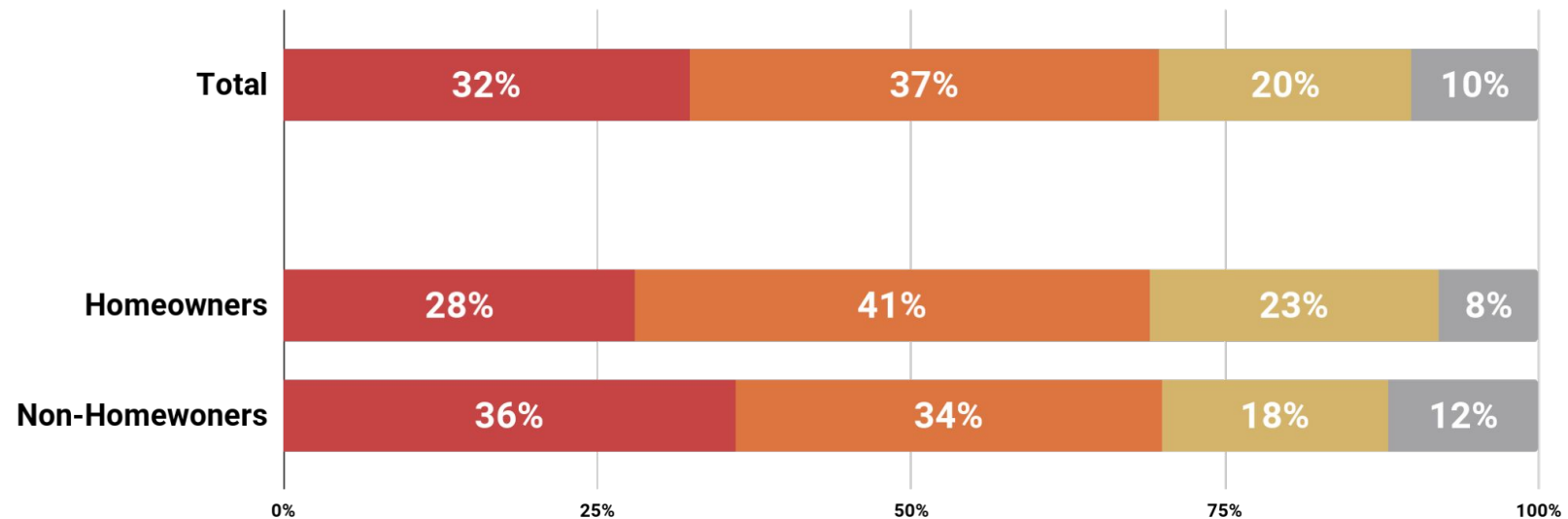
- I The type of house was significantly more important to respondents, as were affordability and proximity to friends and family and other amenities.
- I Prospective buyers were considerably less concerned about each attribute indicating they are more willing to accept compromise to get on the housing ladder.

I **There are many persuadable voters when it comes to housing policy and there can be significant upside for pro-building policies**

- I The public trust the Labour party (39%) far more on housing than the Conservatives (20%), but a large share indicate they are neutral (31%).
- I Housebuilding commitments are a turnout issue and could make 43% of the public more likely to vote at the next general election. Moreover committing to building more housing can move votes making 43% of the public (equivalent to as many as 16.5 million potential voters in England) more likely to vote Labour and 30% of the public (equivalent to 12.5 million potential voters) more likely to vote for the Conservatives. In both cases housing policy is more persuasive to younger voters.

In general, the availability of housing remains a topic of substantial concern amongst the British public

Thinking about housing in England overall, which of the following is closest to your view? (All respondents throughout, unless otherwise stated)



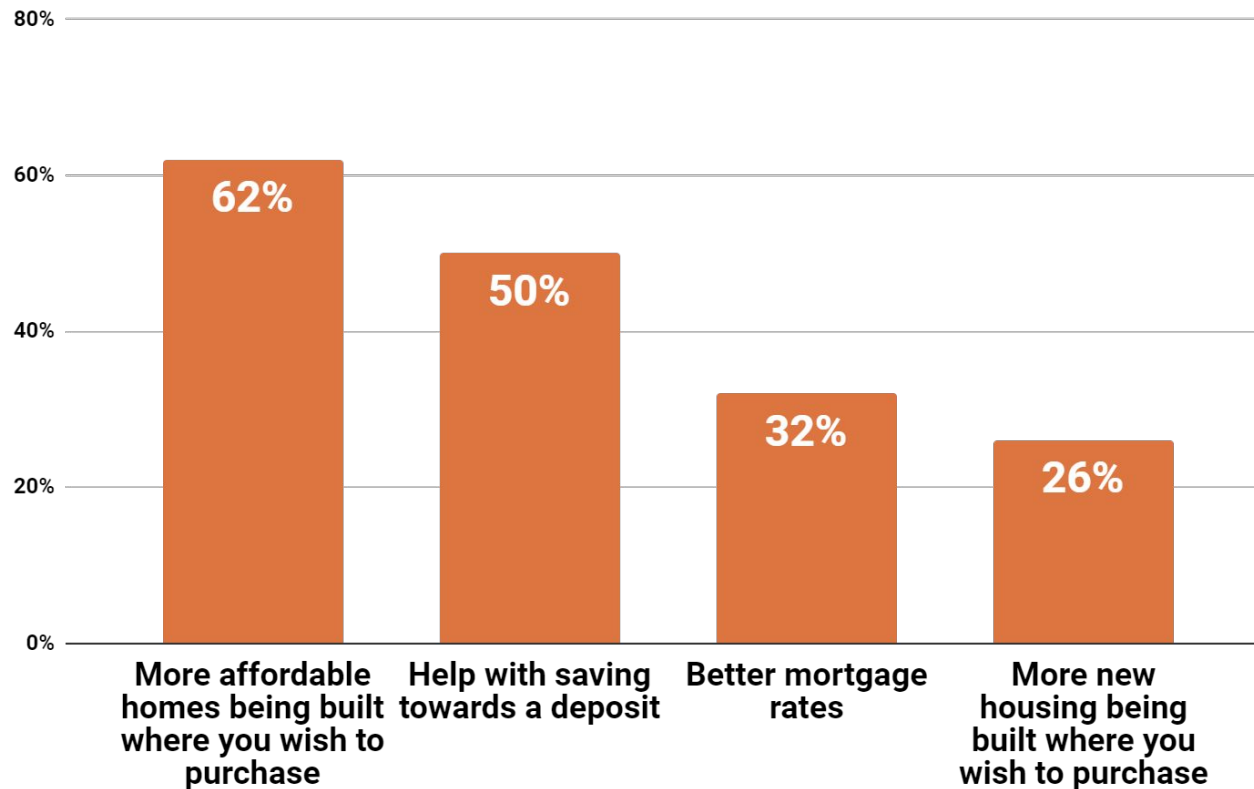
- I am **very** concerned about the availability of housing
- I am **somewhat** concerned about the availability of housing
- I am **not at all** concerned about the availability of housing
- Don't know

Affordable housing

Those looking to buy think building more affordable housing would help them buy, and overall the public support building in their area

Which of the following do you think would be most helpful for you personally to be able to buy your own property?
(Those who want to own at some point)

Rank top 2
n = 906

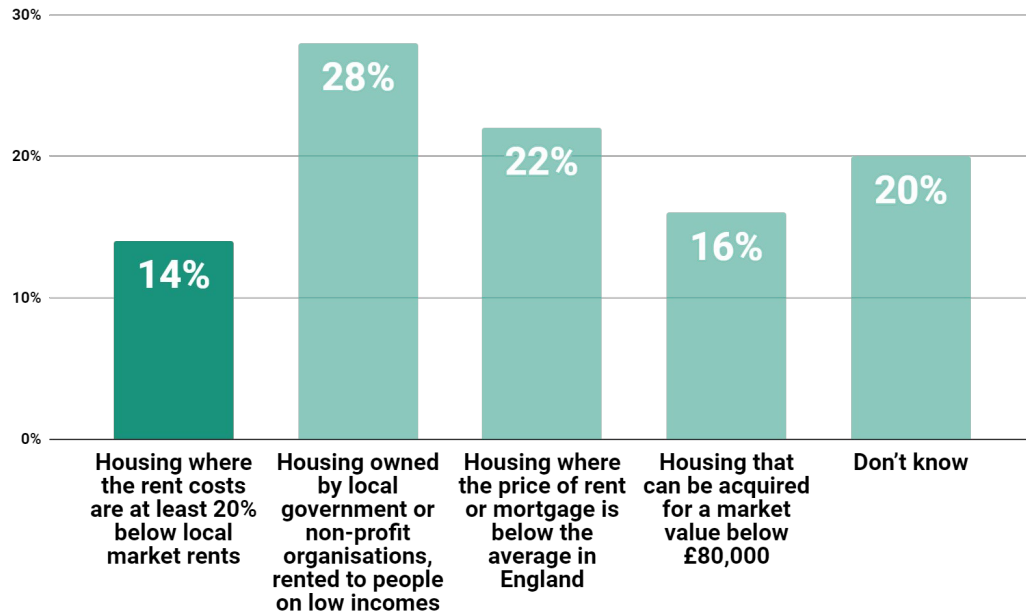


+24%

Net support for more homes being built in respondent's local area (All respondents)

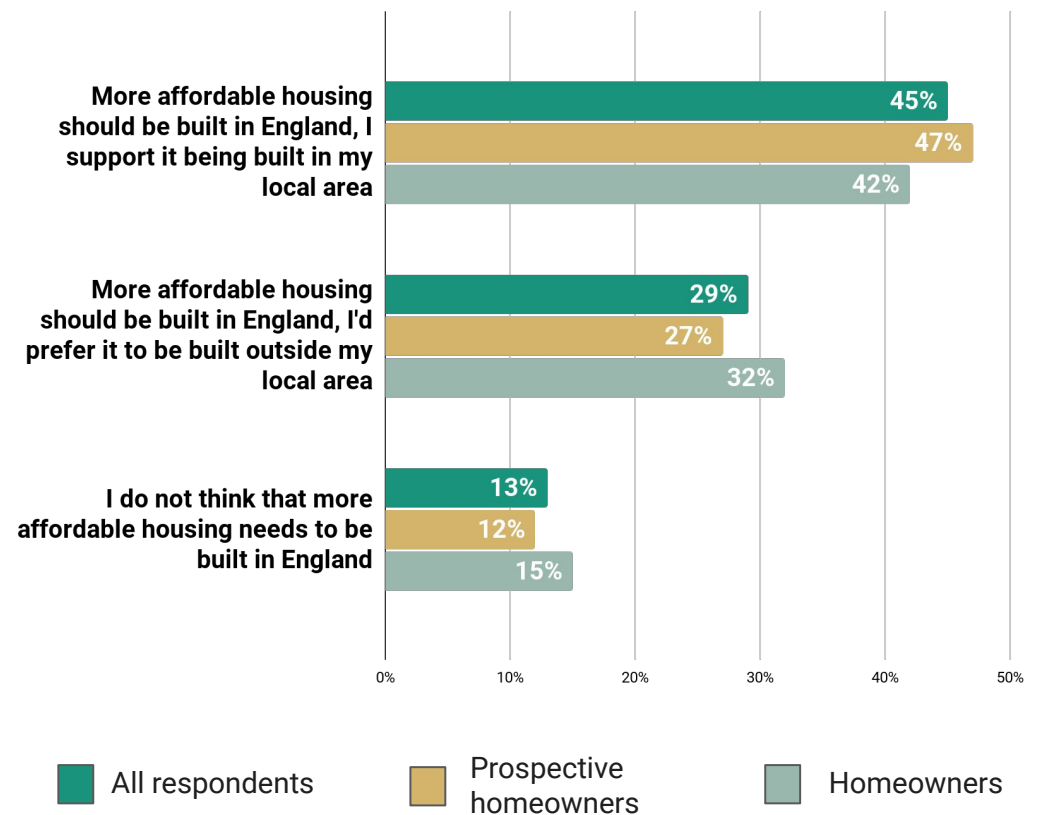
The public at large tend to conflate “affordable housing” with social housing; most don’t understand the technical definition. But they support building more of it

Which of the following would you say best describes what is meant by affordable housing in England?



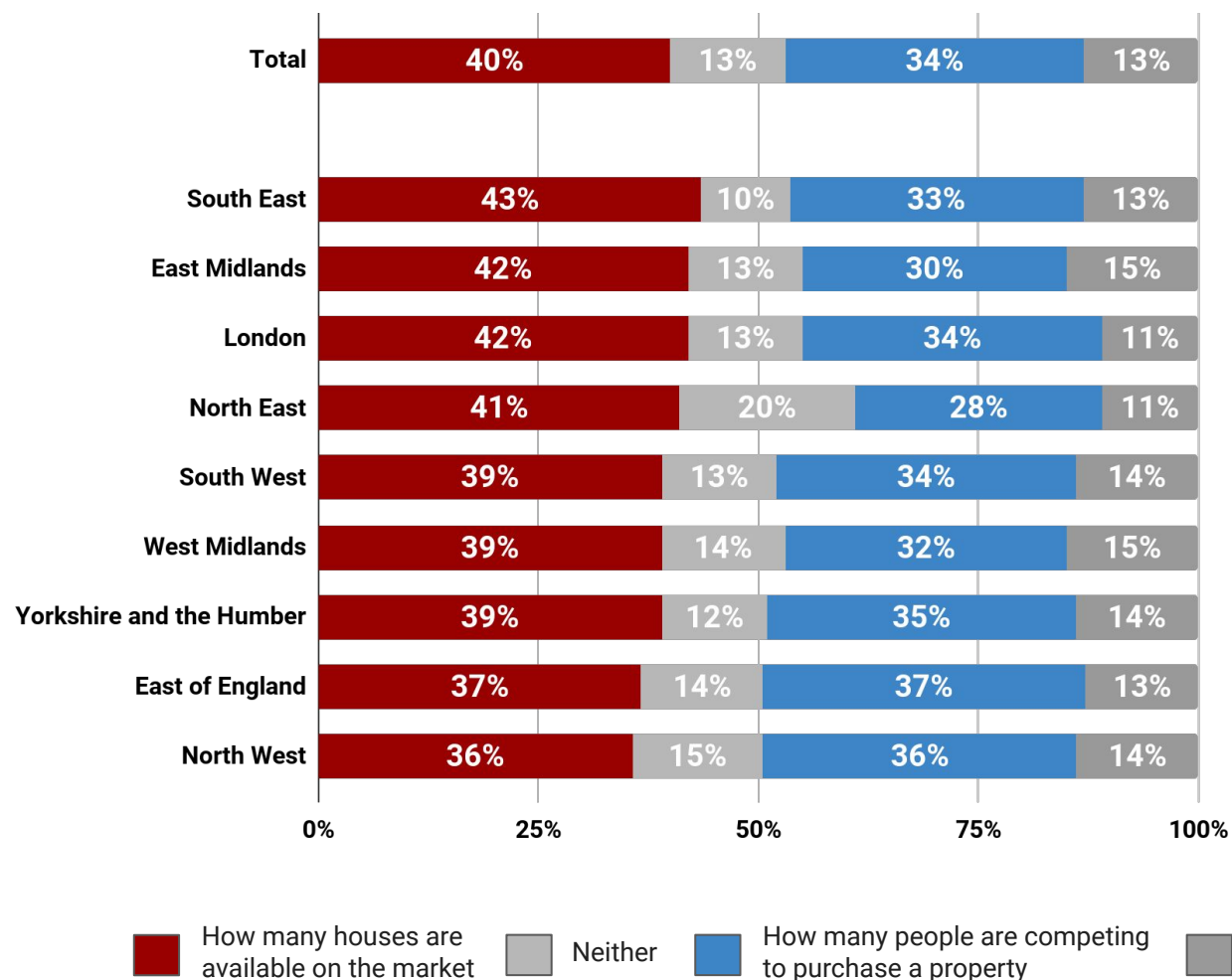
At the moment most affordable housing, as defined by UK Government, built ensures that the rent costs of the property are at least 20% below local market rent.

Which of the following statements do you agree with most, even if you don't agree with any entirely?



Most people identify supply as the primary obstacle to ownership

Which of the following two factors, if either, do you think matters the most in determining the price of housing?



Those in the **South East** and **East Midlands** are most likely to identify **supply** as the main determinant of housing prices

Respondents in the **North West** and **East of England** were more likely to cite **demand** as the main determinant

Development on the Green Belt

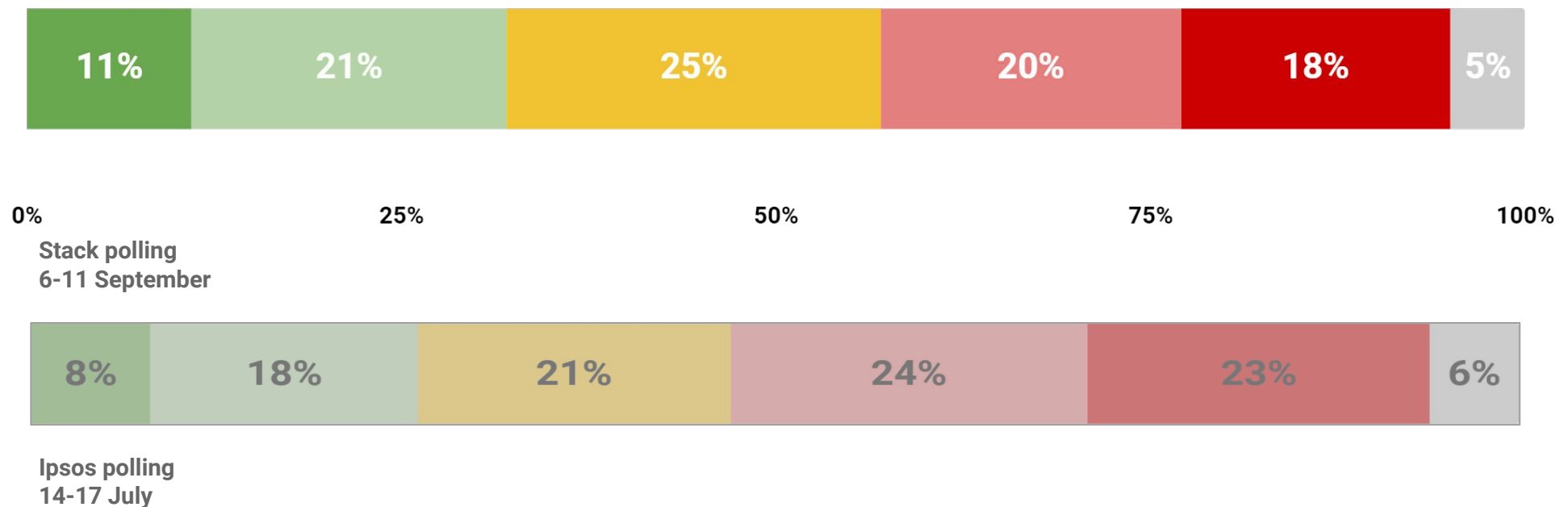
Understanding baseline attitudes about building on greenfield or Green Belt land

We replicated findings published by Ipsos in July, in order to examine whether support and opposition for development on particular types of land was sensitive to argumentation. Public opinion is not inelastic.

Base levels of support and opposition are quite comparable to Ipsos' findings, allowing for possible survey ordering effects.

In principle, to what extent would you support or oppose the following in your local area...

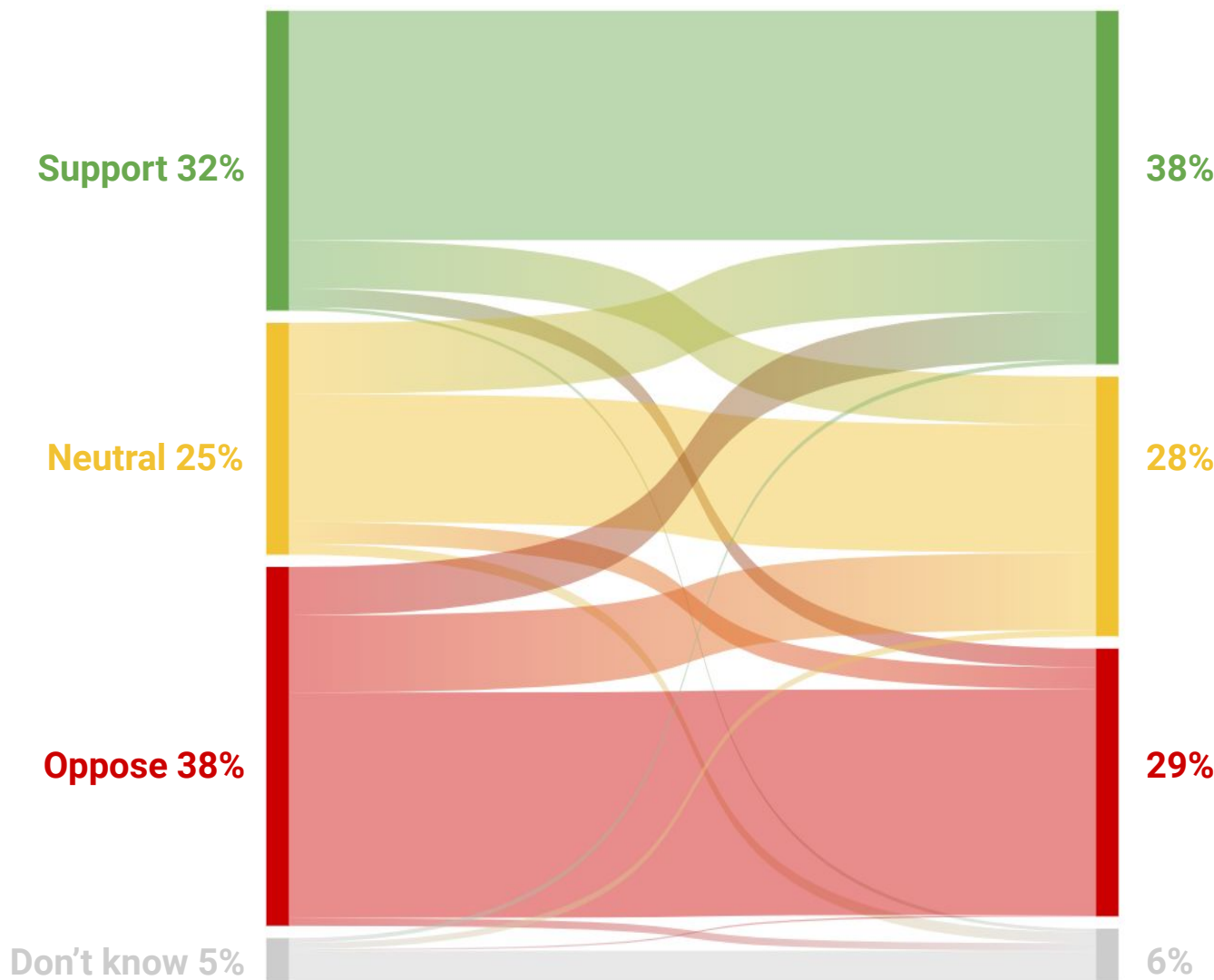
Building on greenfield or Green Belt land (land that has not been built on before)



When told that greenfield and Green Belt development would deliver many more new affordable homes, support increases and opposition falls

Net support **-6%**

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area



Net support **+9%**

It costs a lot more to build on brownfield sites (land that has been built on before), which means many fewer affordable homes, social housing and council housing can be built on brownfield than on greenfield or Green Belt land.

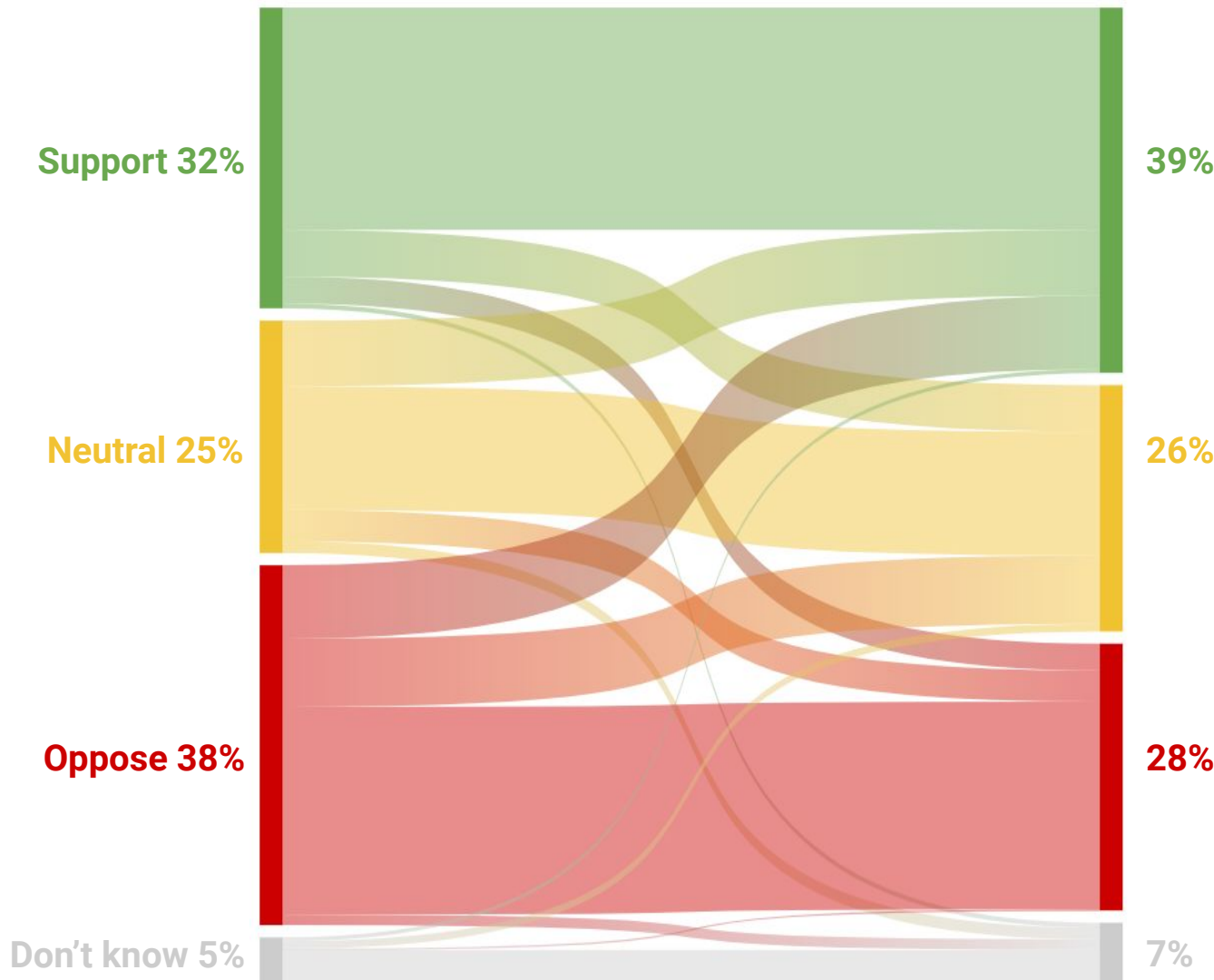
In other words, building on greenfield or Green Belt land will deliver many more new affordable homes, social housing and council housing than building on brownfield land.

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?

Similar changes in support and opposition are seen when respondents are told that some Green Belt development could improve accessibility and increase biodiversity

Net support **-6%**

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area



Net support **+11%**

The majority of land in the Green Belt is agricultural land with no public access and limited biodiversity value. (The Green Belt is land set aside to limit the spread of cities.)

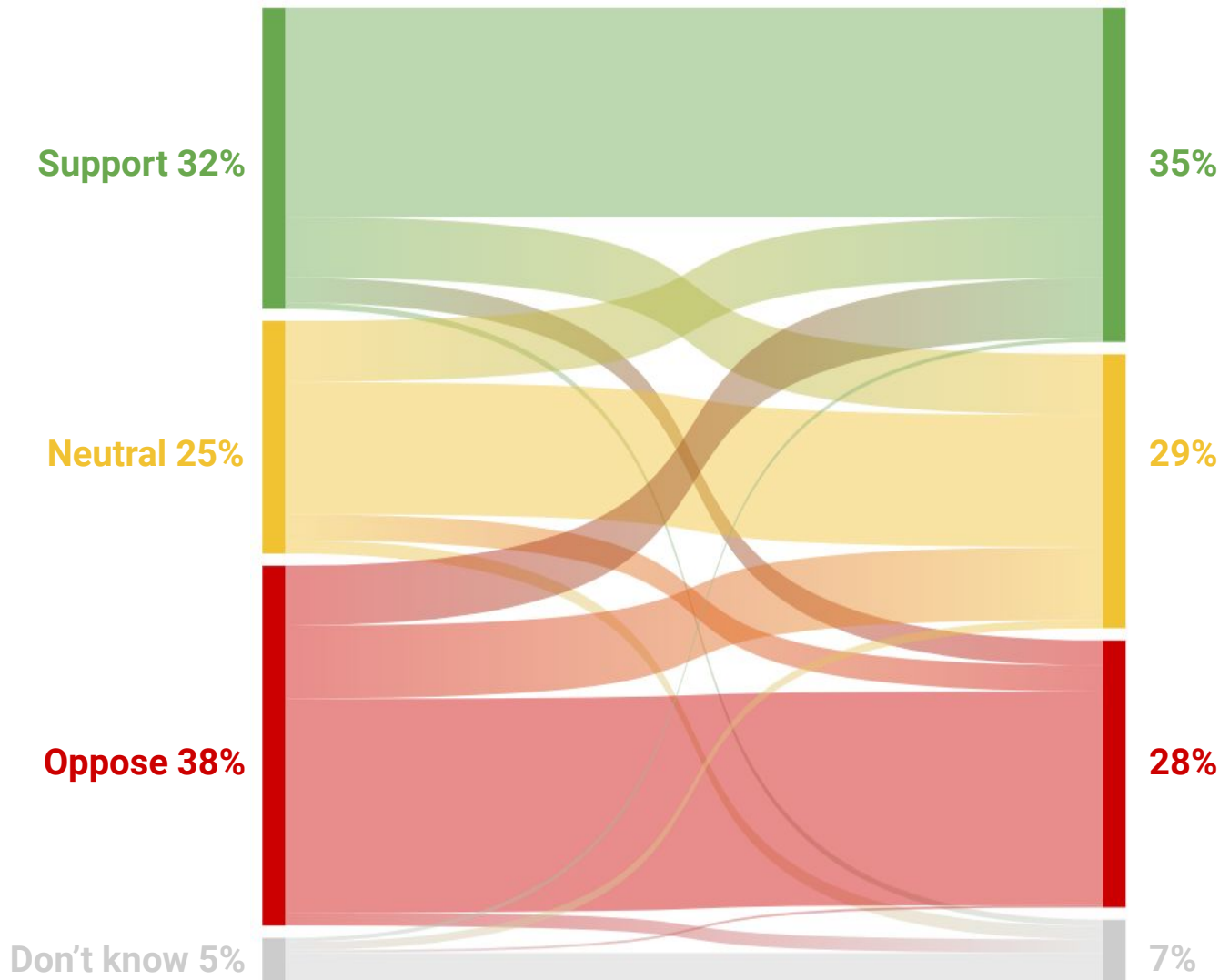
Developing some parts of the Green Belt could make more green space accessible to people, and enhance biodiversity.

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?

An argument about economic growth also decreases opposition to, and increases support for, development on the Green Belt

Net support **-6%**

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area



Net support **+7%**

47% of the UK's wealth is generated by just 10 of our cities.

Academic studies have shown that the Green Belt around these cities limits their ability to grow, and therefore limits their potential to produce more money for investment in public services or cutting tax.

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?

And the affordability argument works across age groups

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area

18 to 35

Net support:

+22%

36 to 64

-14%

65+

-27%

Net support: Support gain:

+34%

+12%

+3%

+17%

-10%

+17%

It costs a lot more to build on brownfield sites (land that has been built on before), which means many fewer affordable homes, social housing and council housing can be built on brownfield than on greenfield or Green Belt land.

In other words, building on greenfield or Green Belt land will deliver many more new affordable homes, social housing and council housing than building on brownfield land.

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?



Those aged 65+ are most responsive to an argument that Green Belt development will improve access to green space and biodiversity

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area

18 to 35

Net support:

+22%

36 to 64

-14%

65+

-27%

Net support: Support gain:

+32%

+10%

+5%

+21%

-7%

+20%

The majority of land in the Green Belt is agricultural land with no public access and limited biodiversity value. (The Green Belt is land set aside to limit the spread of cities.)

Developing some parts of the Green Belt could make more green space accessible to people, and enhance biodiversity.

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?

Economic growth arguments are most persuasive to older respondents but much less so to young people

In principle, to what extent would you support or oppose building on greenfield or Green Belt land in your local area

18 to 35

Net support:

+22%

Net support: Support gain:

+25%

+3%

47% of the UK's wealth is generated by just 10 of our cities.

36 to 64

-14%

+4%

+20%

Academic studies have shown that the Green Belt around these cities limits their ability to grow, and therefore limits their potential to produce more money for investment in public services or cutting tax.

65+

-27%

-11%

+16%

Now you know that, to what extent would you support or oppose building on greenfield or Green Belt land in your local area?

What homes do people want?

What people prioritise: type of housing, affordability and location

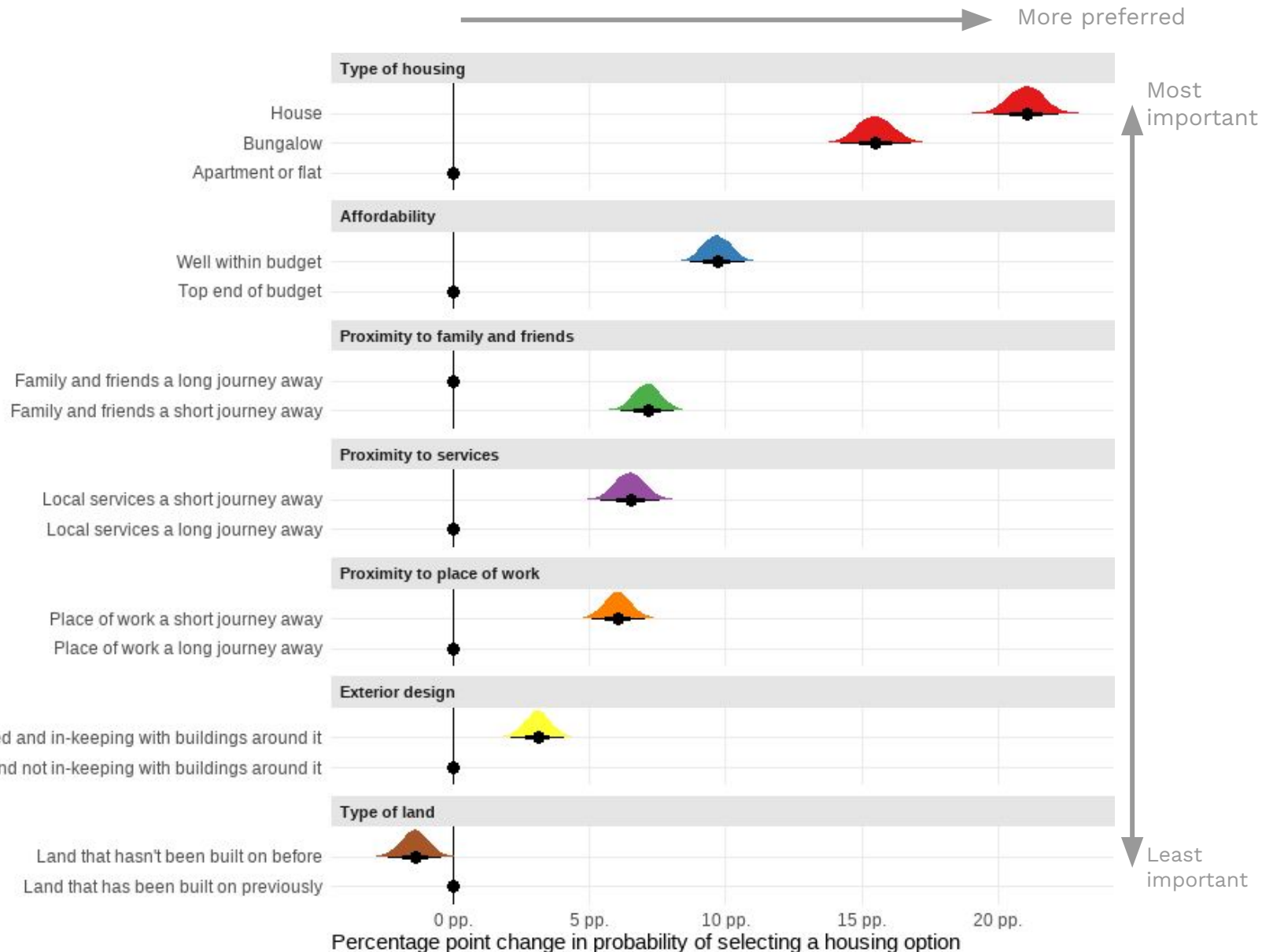
What makes an ideal home?

In this conjoint experiment we showed respondents randomised pairs of “ideal homes” with each of the listed attributes.

By selecting their ideal from the pair, people are revealing - in a structured, comprehensive way - what they care about (most important at the top, least at the bottom) and how much (increasing to the right).

The **type of house** had by far the largest effect on a respondent choosing that ideal home, followed by **affordability** and **proximity** to things of importance.

For the individual, **exterior design** makes little difference, and the **type of land** on which the home is built almost none.

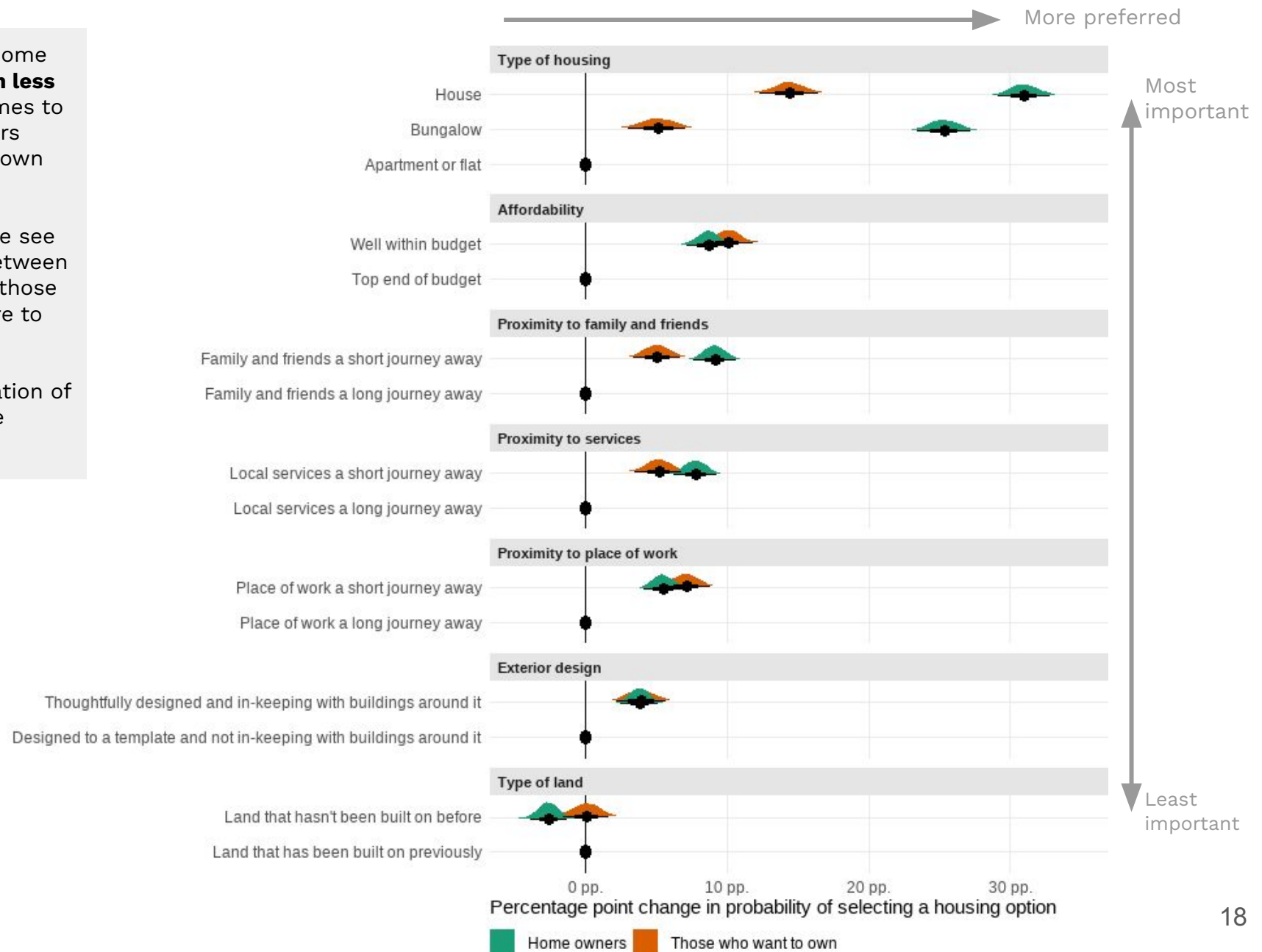


Prospective buyers are easier to please than existing homeowners

Those who do not own a home but would like to are **much less discriminating** when it comes to attributes than homeowners when thinking about their own ideal home.

The one attribute where we see a meaningful difference between aspiring homeowners and those who already own is a desire to upsize into a **house**.

We see the same prioritisation of overall attributes, as in the public at large.



Politics of housing

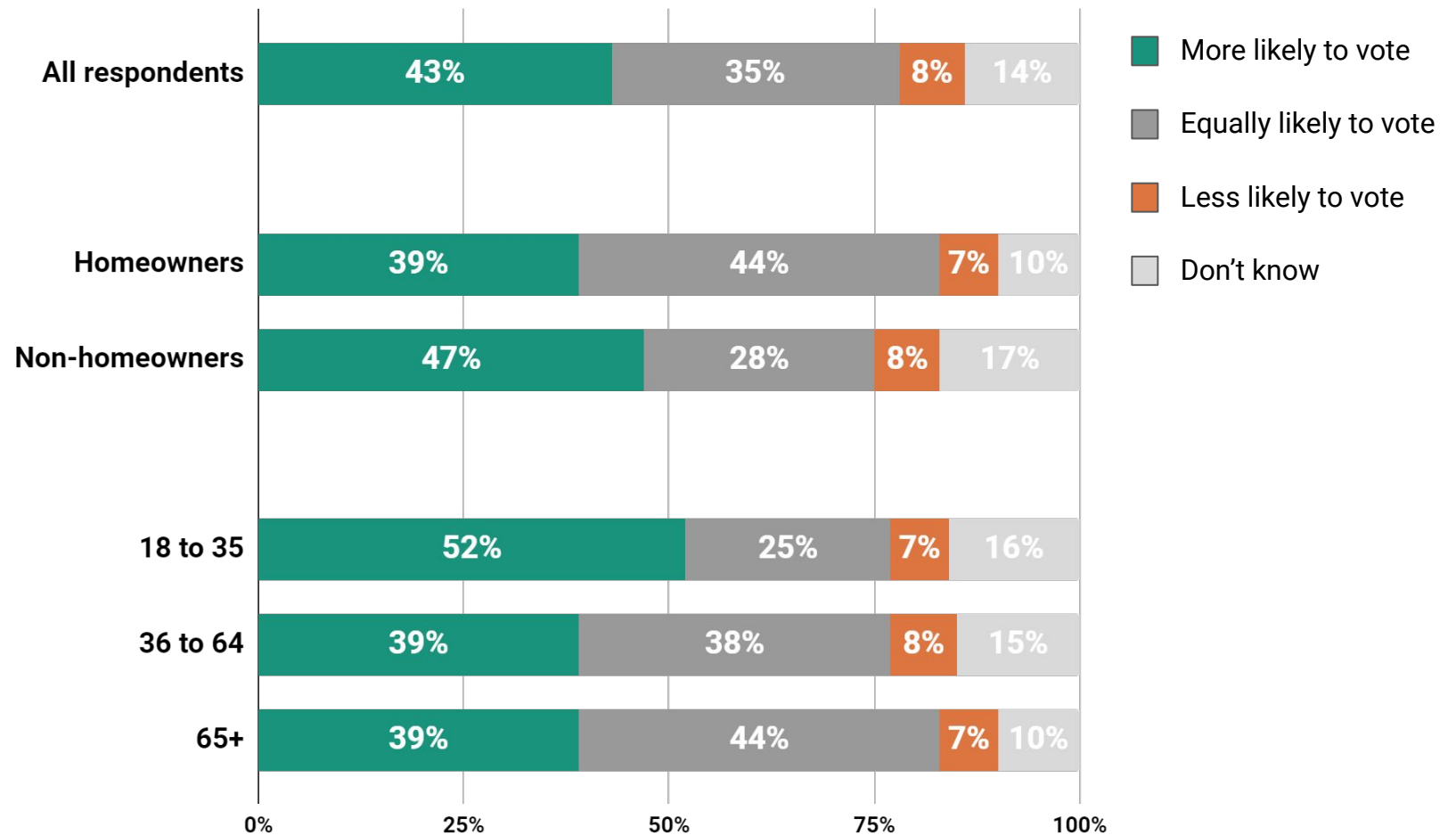
Labour are far more trusted on housing policy but a significant share of potential voters are undecided

Which political party do you think would be best for managing housing policy?

	Base	 Labour		Neither	Don't know
All respondents	2,500	39%	20%	10%	31%
Own a property outright	674	35%	28%	9%	28%
Own a property with a mortgage	478	41%	20%	10%	19%
Renting a property on my own	592	43%	18%	9%	30%
Renting a property with friends or others	302	37%	12%	13%	38%
Living rent-free with my family, relative(s) or others	147	39%	16%	14%	31%
Living with my family, relative(s) or others but pay some rent to them	201	40%	16%	12%	32%
Those who intend to vote Labour	917	84%	3%	5%	8%
Those who intend to vote Conservative	526	6%	70%	11%	13%

Housebuilding commitments could significantly impact election turnout

Do you think you would be more or less likely to vote, if one or more parties committed to building more houses and making housing more affordable?

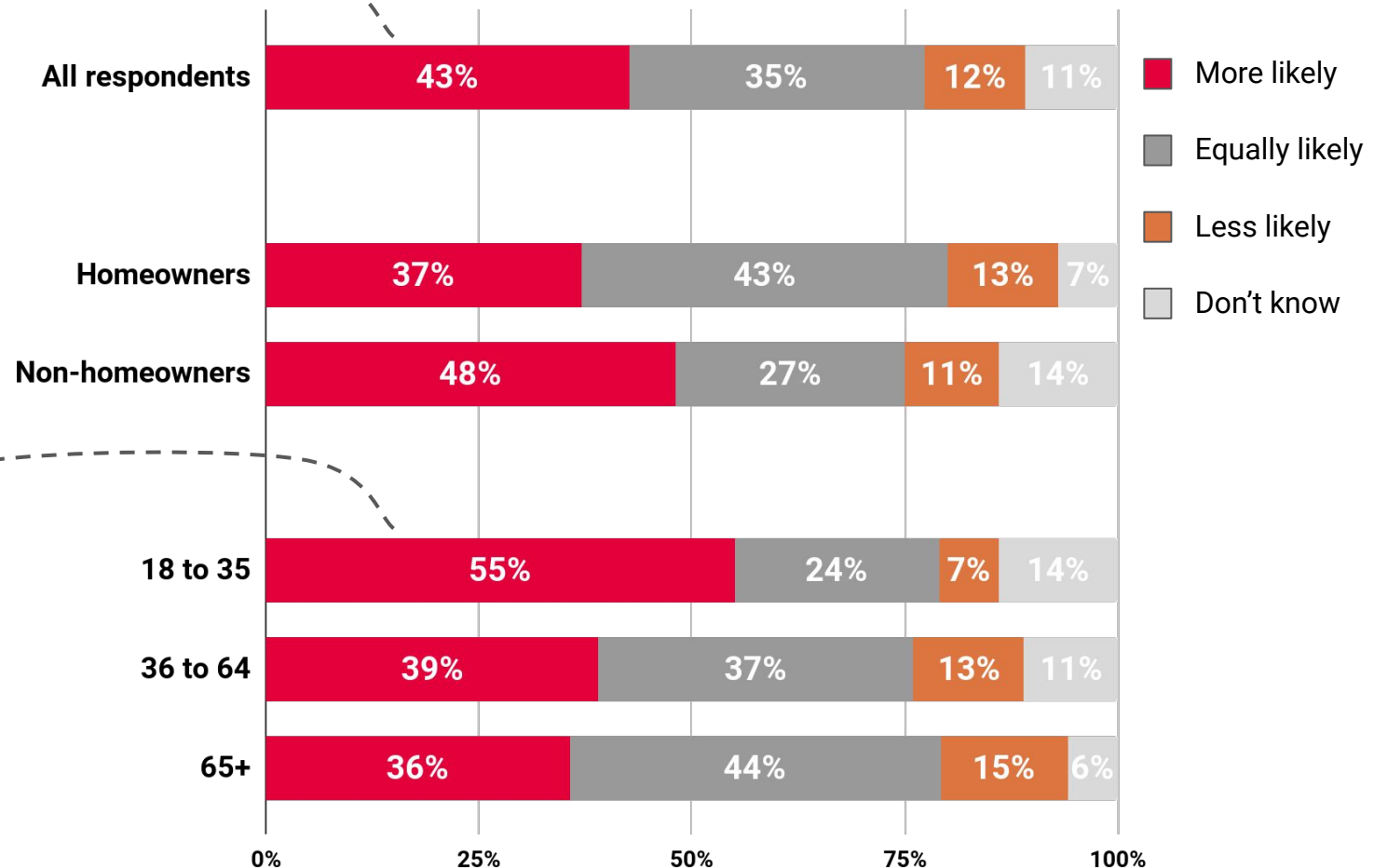


Housebuilding commitments could be a vote winner for Labour

Would you be more or less likely to vote for the Labour Party at the next General Election if it committed to building more houses and making housing more affordable?

Extrapolating to the English electorate we estimate as many as **16.5 million voters** would be more likely to vote for the Labour Party if it committed to affordable housing policy

Estimated more than **7 million** English potential voters

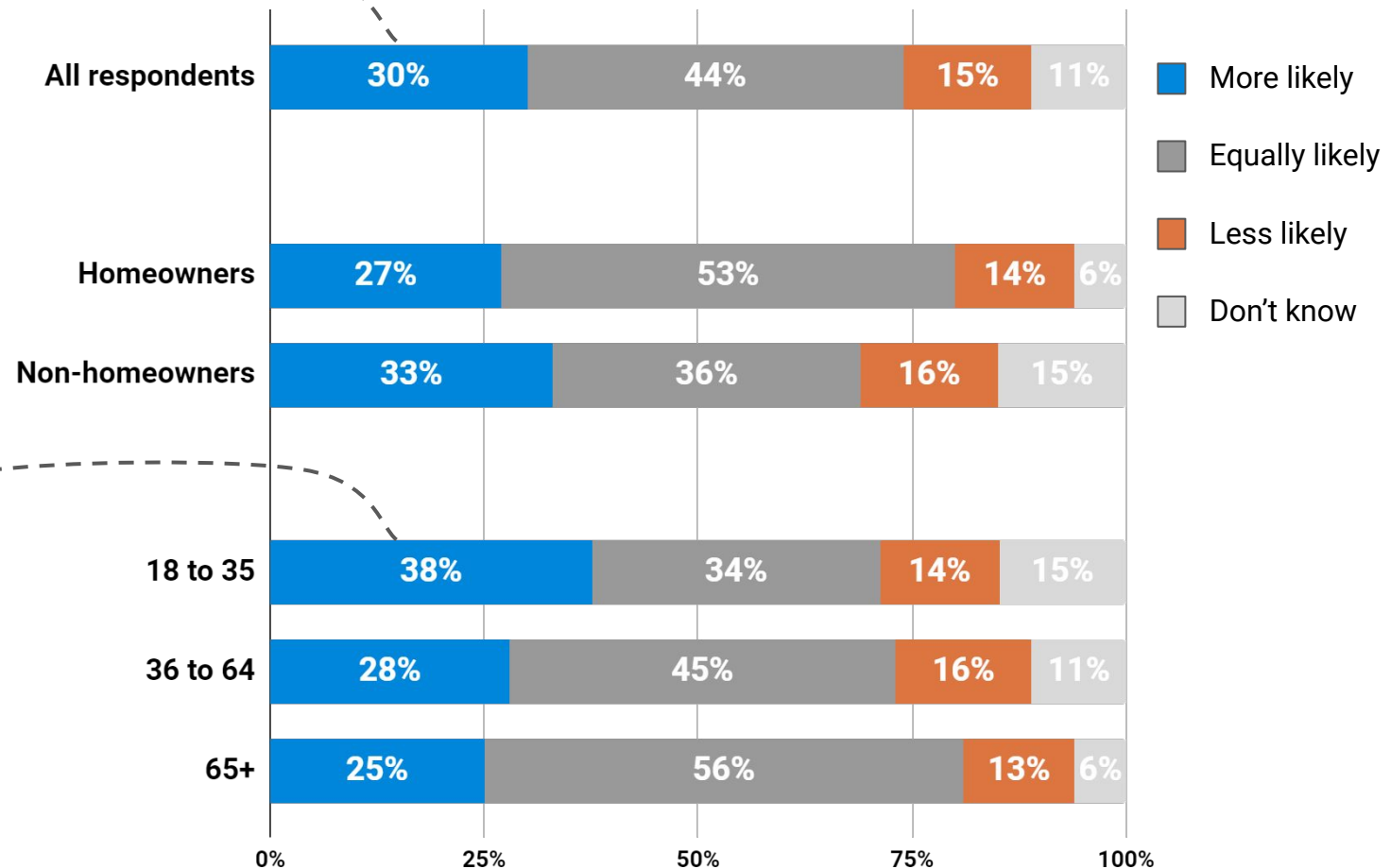


Housebuilding commitments could be a vote winner for the Conservatives

Would you be more or less likely to vote for the Conservative Party at the next General Election if it committed to building more houses and making housing more affordable?

Extrapolating to the English electorate we estimate as many as **12.5 million voters** would be more likely to vote for the Conservative Party if it committed to affordable housing policy

Estimated more than **4.5 million** English potential voters

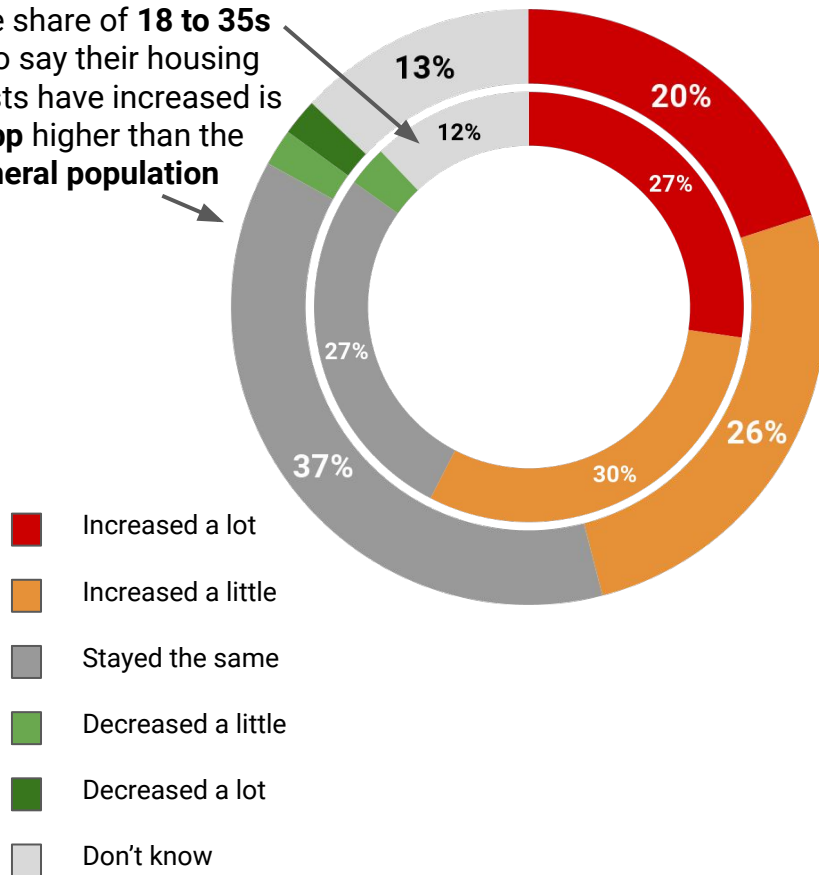


Focus on 18-35s and their struggles with home ownership

Younger people are disproportionately affected by the housing crisis

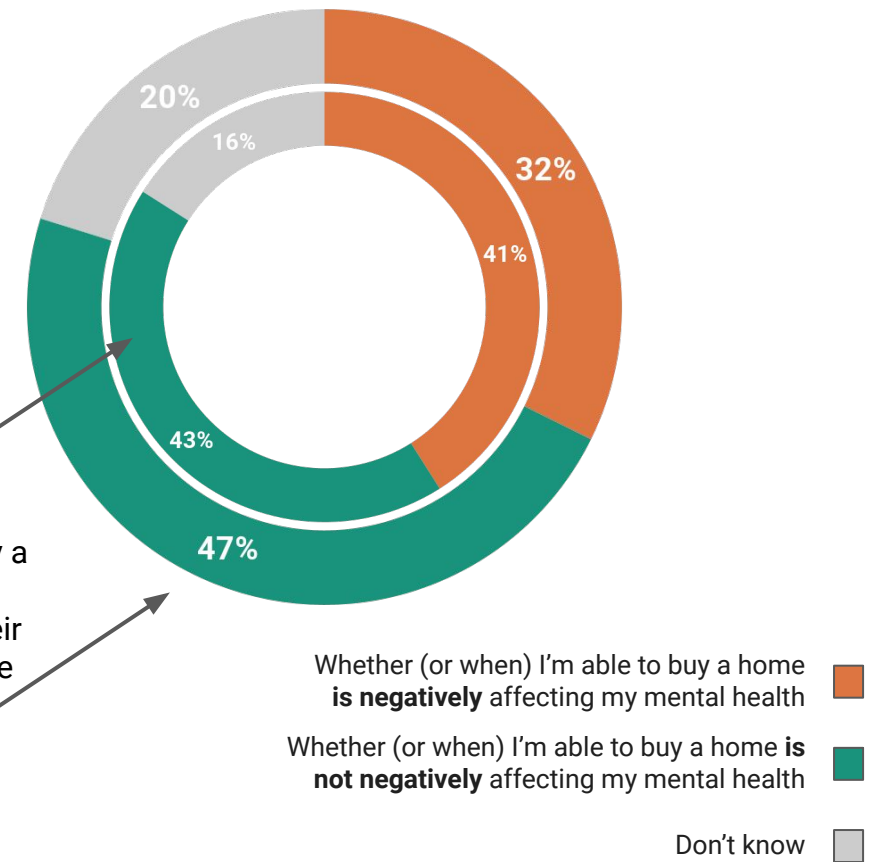
Compared to six months ago, would you say that the amount you spend on your mortgage or rent has increased, decreased or stayed the same?

The share of **18 to 35s** who say their housing costs have increased is **11pp** higher than the **general population**

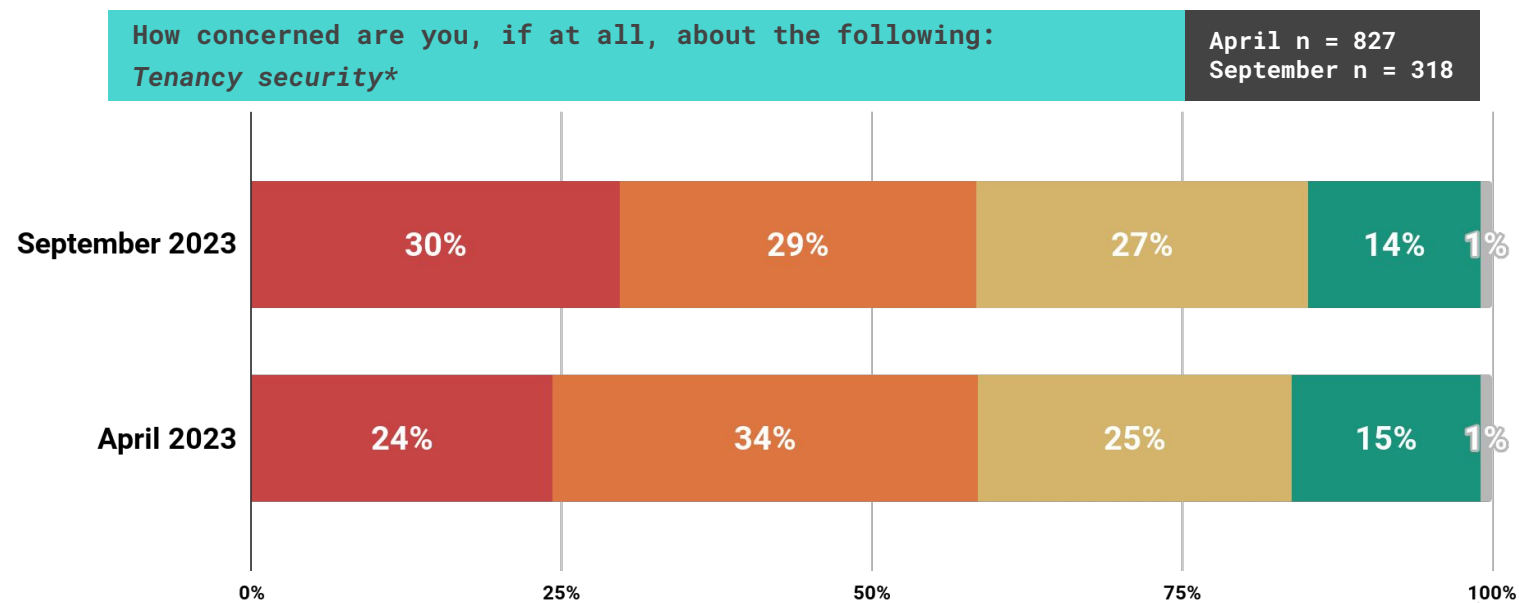
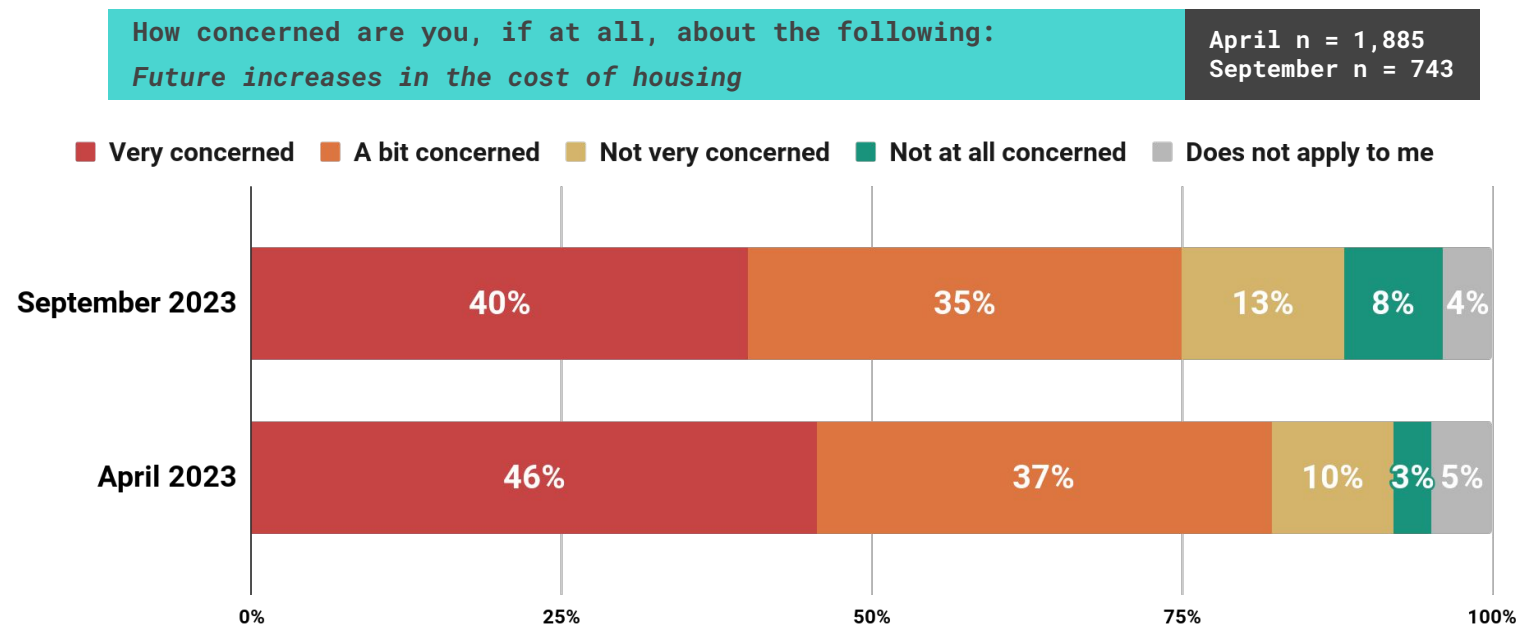


Which of the following do you agree with the most, even if you do not agree with any entirely?

Relatedly, **18 to 35s** are **9pp** more likely to say their ability to buy a home is having a negative effect on their mental health than the **general population**



Concern about housing costs and security among young people is consistently high



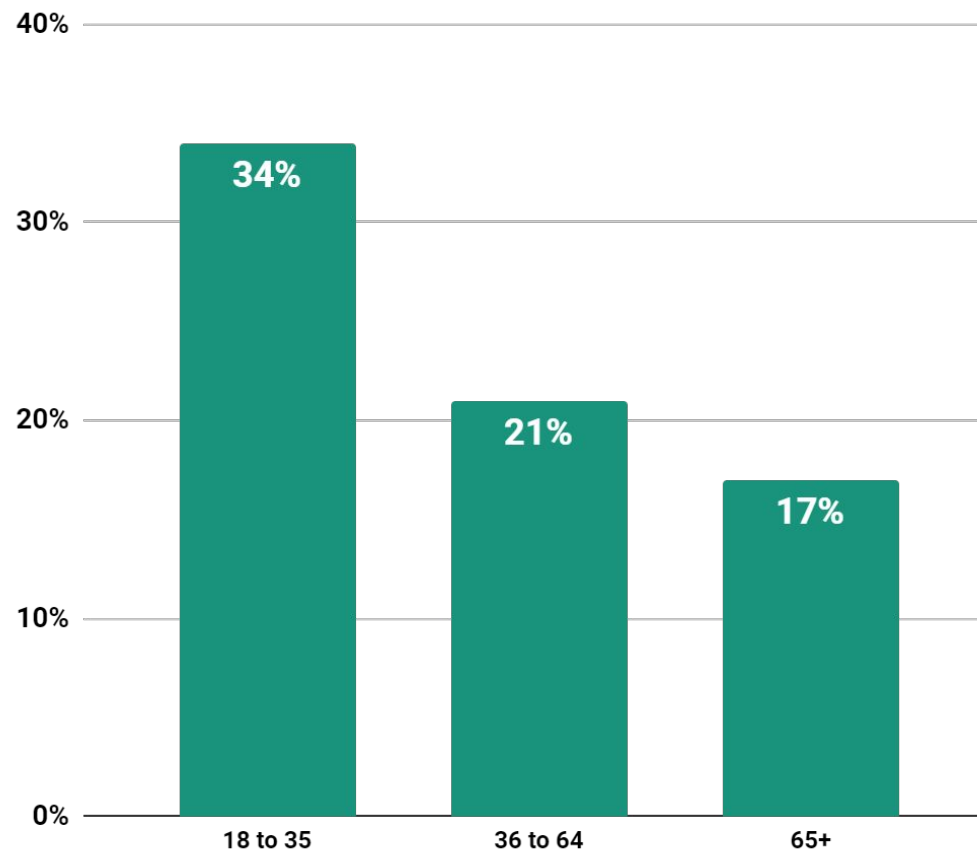
* asked only to those who rent

Housing is a more significant election issue among young people

Which of the following issues would be most likely to increase the likelihood of you voting in the next General Election, if political parties made them central to their campaigns?

Housing

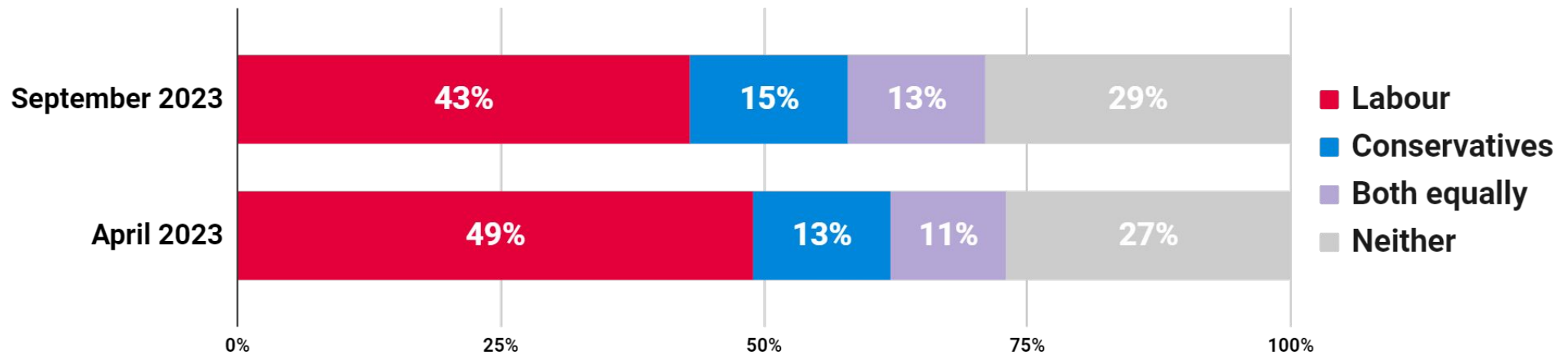
Share who included housing as a top 3 issue



Critically, support for Labour on housing policy among 18-35s may be slipping

Which political party do you think would be best for managing housing policy? (18-35yo)

April n = 1,885
September n = 743





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