



# Sustainability: The Resident Perspective

November 2021



# Sustainability: The Resident Perspective



The HomeViews mission is to share useful, trustworthy insights about residential developments to support those looking for their new home.

In the property industry, much of the rhetoric and strategy around sustainability comes from the top down. We hear a lot about Government targets and proposed solutions for making buildings greener – but what about the residents who live in those homes?

While tracking keywords around the topic of sustainability, we noticed that very few residents mentioned it in their reviews. To understand why, and to gain further insights, we added a new question into our review form in February this year.

This asks reviewers whether sustainable building features are important to them. If they answer ‘yes’, they are then given a number of features and asked which three of those are most important to them.

The resulting data provides a new angle on sustainability: the perspective of the residents themselves. What’s important to them and what isn’t? How does resident age affect those preferences? Do tenants and owners view sustainability differently?

Having only introduced this new question earlier this year, this report provides an initial ‘snapshot’ of results. Our aim is to give developers and operators a better understanding of resident demand for specific sustainable building features, and these insights will develop as the data expands.

This should enable the industry to promote properties more effectively. It could also be used to more accurately assess the economic benefits of investing in sustainable building technologies.

This data also begins to indicate key areas where consumers may require more education on the significant benefits offered by specific sustainable technologies or strategies.

Our hope is that these new findings, alongside the unmatched established dataset already offered by HomeViews, will combine to provide the industry with the insights it needs to create homes that are economically, socially and environmentally sustainable.

**Rory Cramer**  
CEO & Co-founder of HomeViews

“The ratings website that’s changing housing.”







Blackhorse Mills by Legal & General,  
Urbanbubble

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HomeViews has a total of over **28,000** reviews covering more than **1,750** new build developments across the UK.\* Having tracked keywords around sustainability we noticed that very few residents were mentioning these topics in their reviews.

So, in February 2021 we began asking reviewers whether sustainability was important to them or not. If they answered 'yes', we then asked them to select up to three of the following sustainable building features that were most important to them:

### Sustainability

Are environmentally sustainable features important to you? \* ☒ Yes ☐ No

Many developments offer environmentally sustainable features; which are the most important to you when choosing a new home? You may select up to three:

☒ Renewable energy sources i

☒ Recycling services

☒ Building environmental ratings i

☒ Energy saving measures i

☒ Bike storage

☒ Parking alternatives i

☒ Sustainable building materials and construction methods i

☒ Access to private green space i

☒ Smart features to improve facilities management

This gave us the following dataset for this initial 'snapshot' report on the resident response:

Total number of reviews:  
**3,199**

Reviewer types:  
**Verified owners, tenants and shared owners of new build housing developments built in the last 20 years. (In this dataset, developments are those mostly built in the past 3 years)**

Dates:  
**Reviews collected between 26 Feb '21 - 26 July '21**

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The apartments have a modern design, with high-quality furniture and great sound and thermal insulation

*Verified Resident on HomeViews, Blackhorse Mills by Legal & General, Urbanbubble, May 2021*

*\*As of September 2021*

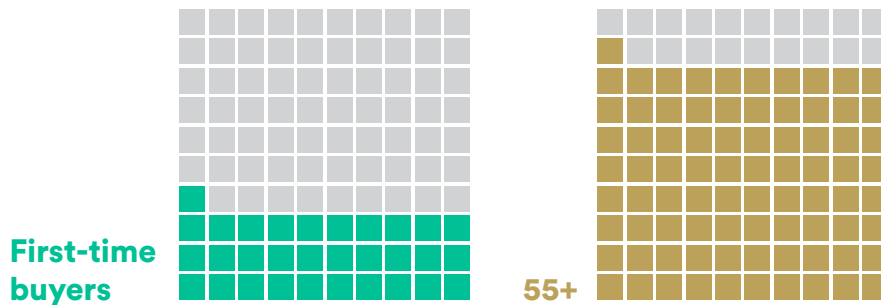


## Key findings



Almost 70% of reviewers indicated that **sustainable building features** were important to them.

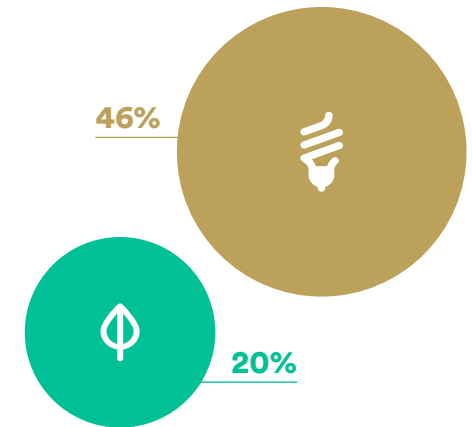
**Less than a third** (31%) of first-time buyers said that sustainable building features were important to them, while **81% of the 55+** age bracket said that these features were important to them – the most for any age category.



**Recycling services** were by far the most important sustainable building feature across all new build residents, with **energy saving measures** the second most important and **renewable energy** a close third.



About 46% of reviewers who said that sustainable features were important to them included '**energy saving measures**' within their selections, but only about 20% indicated '**building environmental ratings**' as being important to them.



**Sustainable construction methods** and **smart features** were not highly valued by residents.

Sustainable construction was the least important sustainable feature to tenants, while owners valued smart features the least.

# 1. Sustainability: The Resident Overview

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In this section we look in more detail at findings from the main dataset. We also pull out the key headlines around differences between age groups within that data.





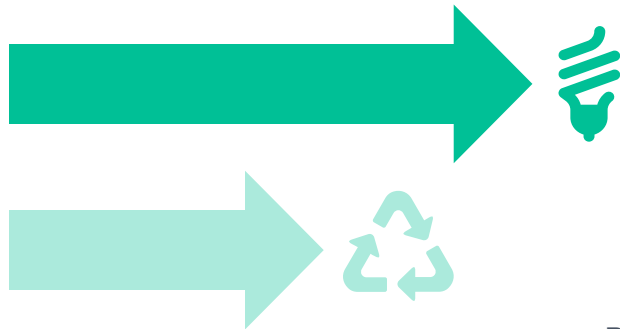
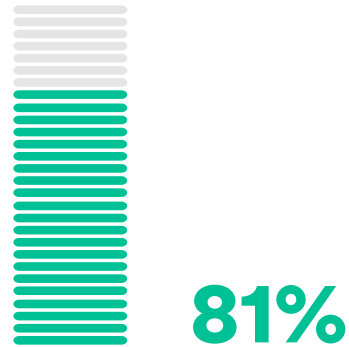
# 1.1. Data overview and age breakdown



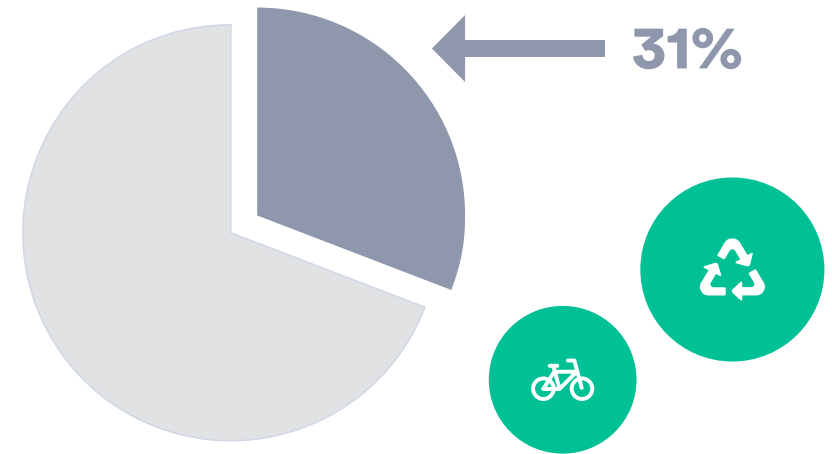
Overall, almost 70% of reviewers in the sample indicated that sustainable building features were important to them. Recycling services were by far the most important sustainable building feature across all new build residents, with energy saving measures the second most important and renewable energy a close third.

## 1.2. Key findings: age breakdown

Sustainable features were most important to the 55+ age bracket, with 81% responding 'yes' when asked.



Residents in the 45+ age brackets placed less emphasis on the importance of **recycling**, and valued **energy saving** measures more.



Less than a third (31%) of first-time buyers said that sustainable features interested them. First-time buyers who were interested in sustainable features valued recycling facilities and bike storage more than other types of buyer.

“ The building is eco friendly and well equipped. I have never spent so little on bills!

*Verified Resident on HomeViews, Fizzy Stepney Green, E1 by Fizzy Living*



### 1.3. Building eco ratings



About **46%** of reviewers who said that sustainable features were important to them included 'energy saving measures' within their selections, but only about **20%** indicated 'building environmental ratings' as being important to them.

Additionally, of those reviewers who selected 'energy saving measures' as being important to them, only 19% also indicated that 'building environmental ratings' were important to them.

This suggests that consumers may be more informed on the benefits of energy saving measures, such as glazing, insulation and water saving features, than the building ratings that rate the effectiveness of those measures – if in place.

EPCs were launched in 2007 and underwent a major redesign in 2020 when the certificates were made digital-only. A report written back in 2011 by the now-closed Consumer Futures statutory organisation found that EPCs had little impact on consumer decision-making.\*

Our data suggests that this situation has not significantly improved. Along with the low value placed on EPCs by our reviewers, we can see that only four reviews, out of over 27,000 on HomeViews, contain any reference to EPCs and related keywords.

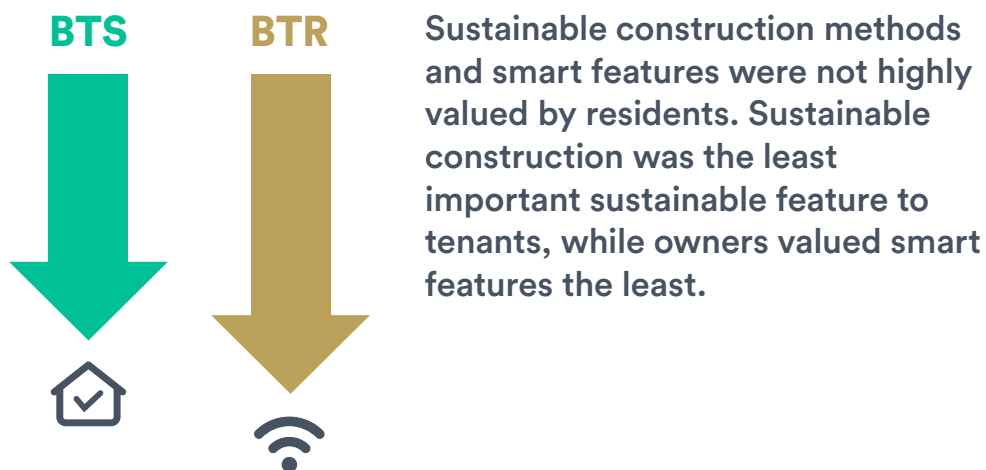
A total of only **4** reviews, out of more than **27,000** on HomeViews, mention EPCs or related keywords

**“ Not sure how it got a EPC rating that good, probably depends when it was measured.**

*Verified Resident on HomeViews, August 2021*

\*As easy as EPC? Consumer views on the content and format of the energy performance certificate, Consumer Focus, 2011

## 1.4. Sustainable construction methods



Considering the significant impact construction methods can have on the short- and long-term environmental impact of a building, this finding may again point to the need to educate and inform consumers better on this crucial factor. Many consumers may understand the need to create 'zero carbon' homes but may not understand the scale of the impact that construction has on a building's carbon footprint.

For example, traditional construction methods lead to around 20% of raw materials being wasted on site, while more sustainable Modern Methods of Construction (MMC) reduce this down to around 1%. Traffic to the construction site is also reduced by over 80%, according to a 2007 WRAP study.\*

MMC is also ideally suited to meeting the stringent quality standards required for building highly efficient homes. Modules will be assembled in factories with far tighter quality controls than would be possible on a construction site. This gives MMC the twin benefit of reducing carbon emissions during construction as well as increasing the carbon efficiency of the building once complete.

Mark Farmer, one of the UK's leading experts on Modern Methods of Construction (MMC), advises developers on the implementation of these construction techniques. Head to the Case Study section 3.3 to see his comments.

\*Current Practices and Future Potential in Modern Methods of Construction, WRAP, 2007

**“ The development is well built overall and nicely insulated and designed**

*Verified Resident on HomeViews, Woodberry Down, N4 by Berkeley Homes*

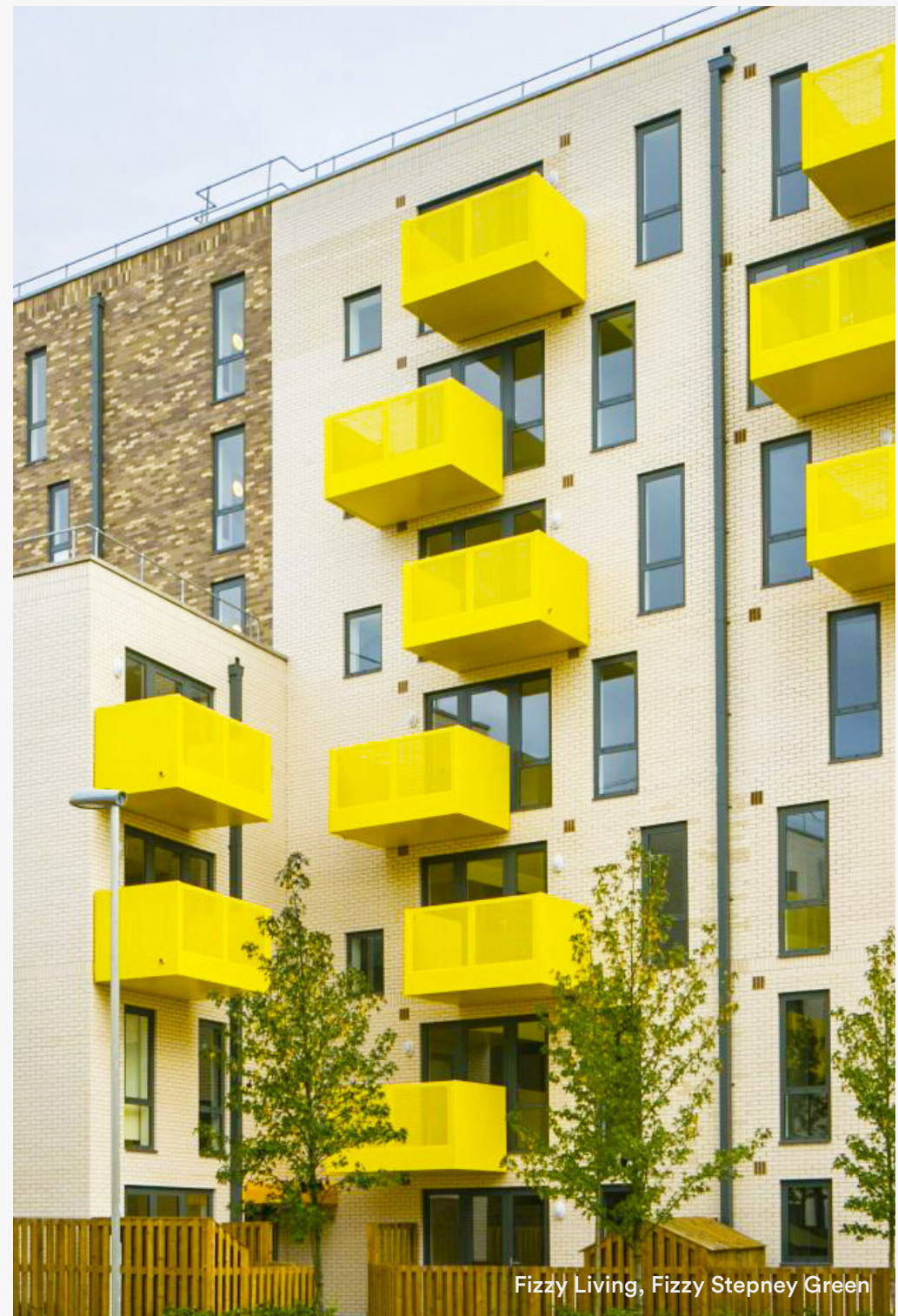


## 2. Data Breakdown:

### Region / Property Type / Resident Type

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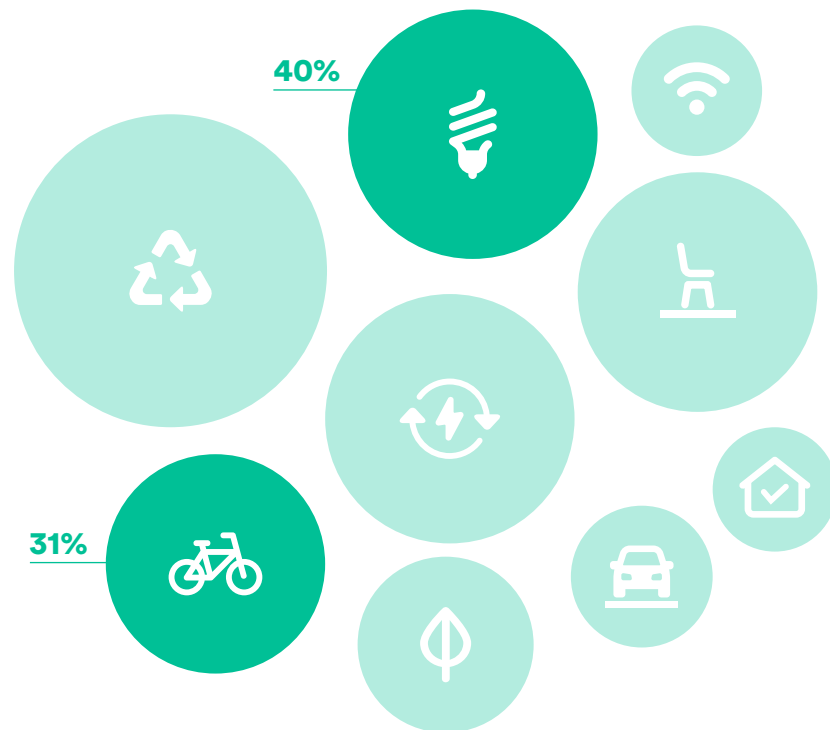
Here we look at the main variations between residents in London and regional developments. We also highlight key differences between house/apartment and BTR/BTS residents, as well as overall data for tenants and owners.



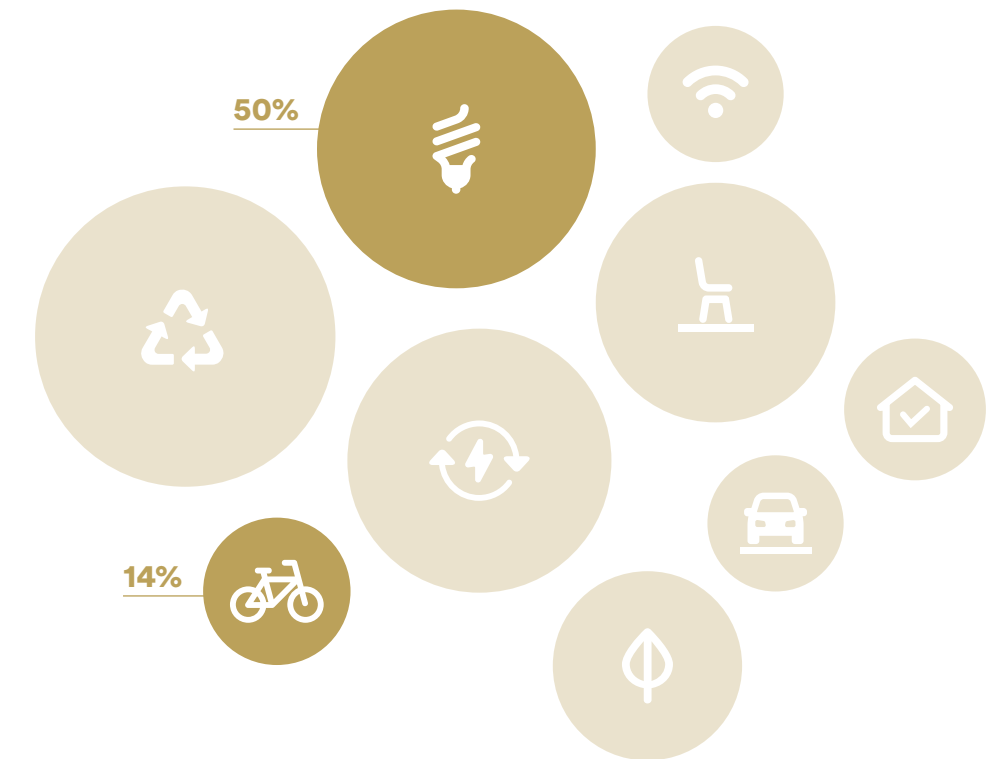
## 2.1. London/regional: key findings

London residents placed less emphasis on the importance of **energy saving measures** and renewable energy than regional residents. However, Londoners valued **bike storage** as a sustainable feature much more highly.

### LONDON



### REGIONS



- |                        |                      |                          |
|------------------------|----------------------|--------------------------|
| Recycling services     | Private space        | Parking alternatives     |
| Energy saving measures | Bike storage         | Sustainable construction |
| Renewable energy       | Building eco ratings | Smart features           |

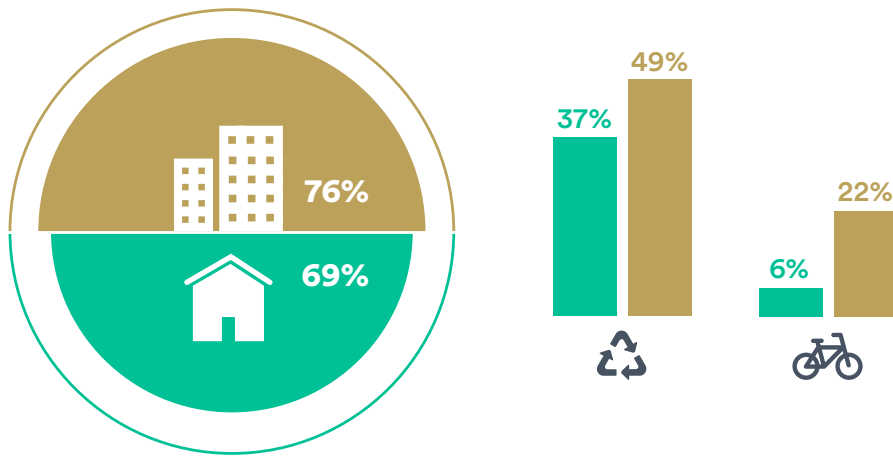
“ Good to see the new section currently being erected has got solar panels on a lot of the houses

*Verified Resident on HomeViews, Highbrook Park, BS34 by Crest Nicholson*



## 2.2. Houses/apartments: key findings

Apartment residents valued **sustainable features** more than residents in houses (76% compared with 69%), and particularly valued recycling services and bike storage.



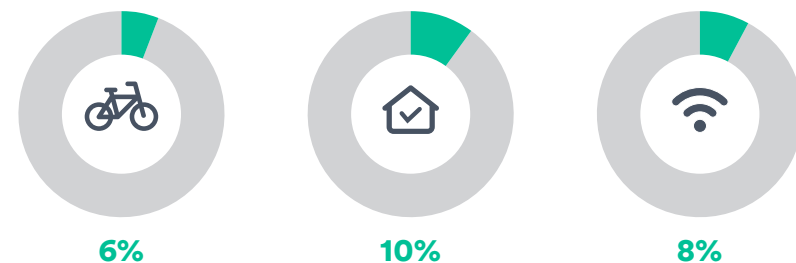
“ The new buildings have recycling bins for everything, food, clothes, electrical appliances etc.

*Verified Resident on HomeViews, Royal Arsenal Riverside, SE18 by Berkeley Homes*

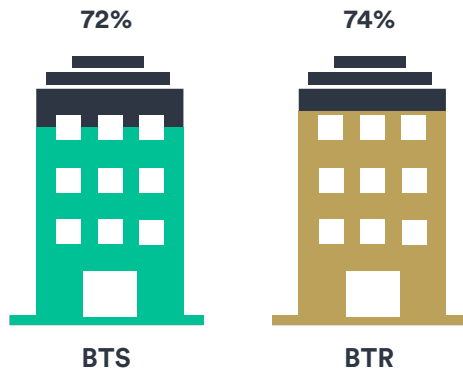
House residents that did value sustainable features cared the most about recycling services, energy saving measures, and renewable energy equally. Bike storage, sustainable construction and smart features were the least important features to them.



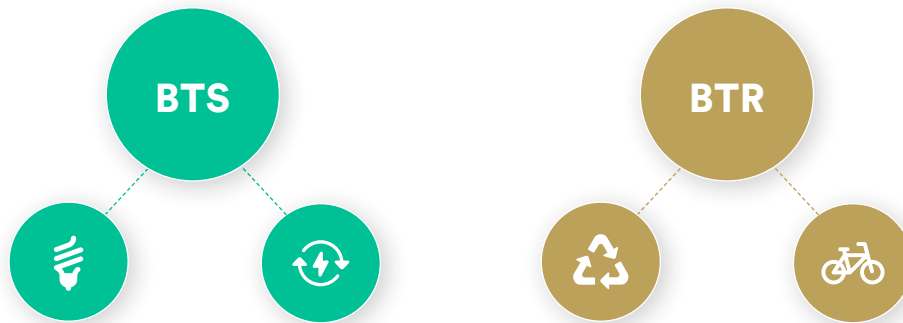
**Bike storage, sustainable construction** and **smart features** were the least important features to house residents.



## 2.3. BTR/BTS

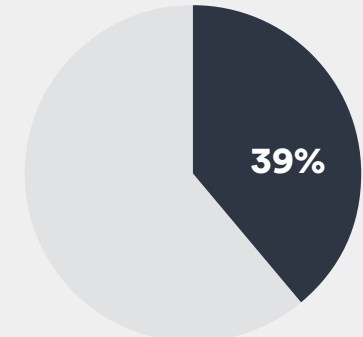
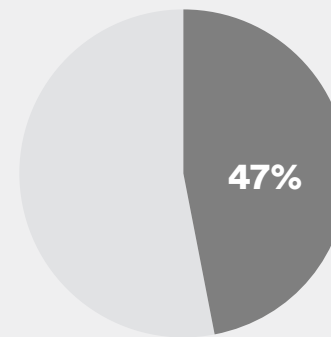


Sustainable building features were seen to be equally important to BTR and BTS residents (BTR 74%, BTS 72%)



BTR residents valued **recycling services** and **bike storage** more than BTS residents, who valued **energy saving measures** and **renewable energy** more highly.

### Tenant/owner

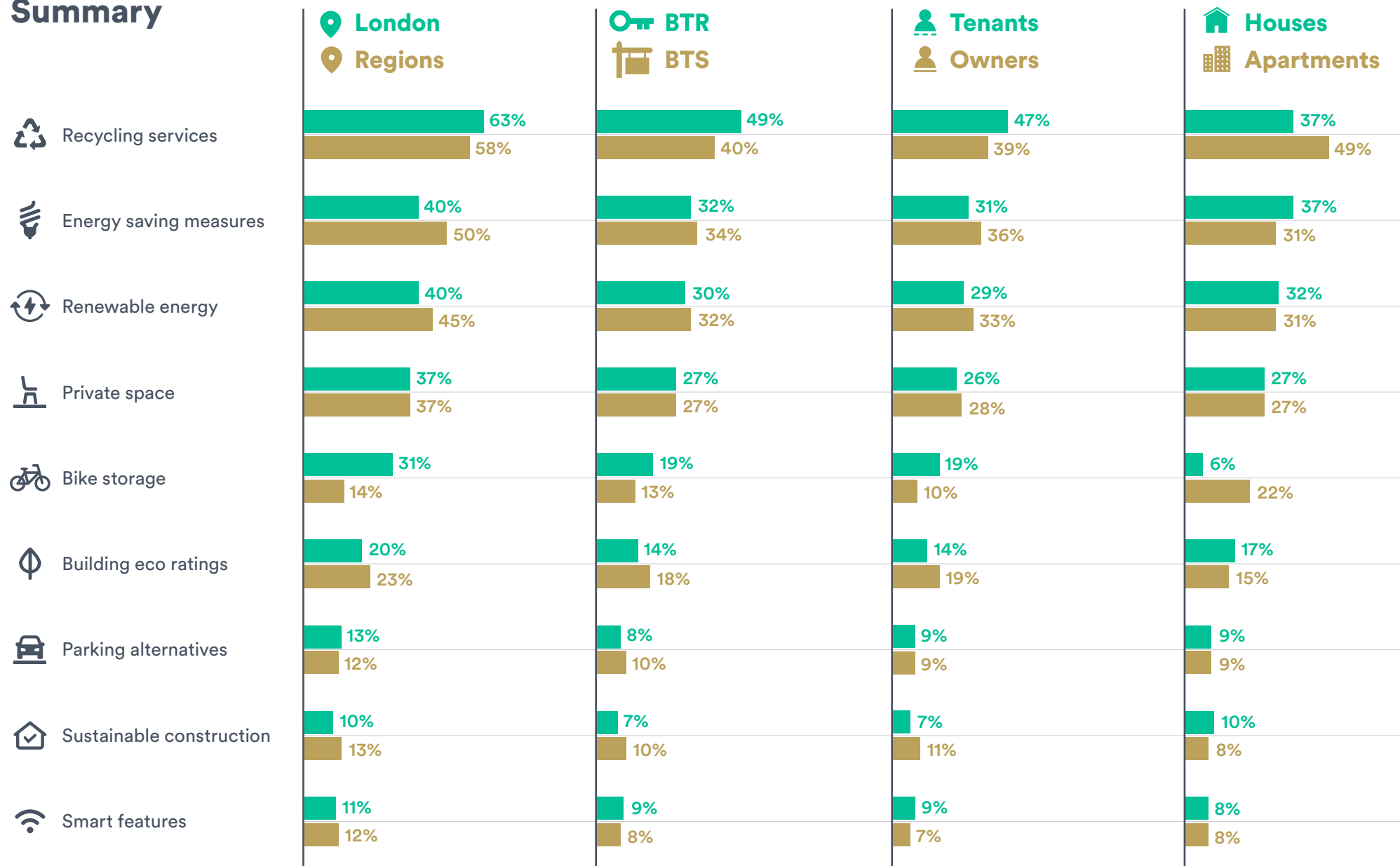


**47%** of all new build **tenants** indicated that recycling was important to them, compared with **39%** of new build **owners**


“ I like the modern insulation/materials used to build the house. Thermal efficiency is a good point to consider

*Verified Resident on HomeViews, Our Lady's. M28 by Simple Life Homes*

## 2.4. Data Breakdown Summary



Assael

Homes for rent by  Legal & General



### 3. Case Study:

## Blackhorse Mills

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We take a closer look at the Blackhorse Mills development in Walthamstow – the first Build to Rent scheme to achieve the Home Quality Mark status from BRE Global. We hear from architects Assael and consultants CAST on the sustainable approaches to planning, designing and building this landmark BTR development.

Of those Blackhorse Mills residents who responded to our sustainability question, 100% said that sustainable building features were important to them.



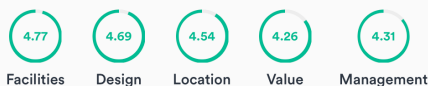


### 3.1. The Building

## Blackhorse Mills



4.48 (35 reviews)



The highest-rated development  
in North-East London



479 residential homes

104 affordable homes

1.60 ha site area

45,340 sq m gross internal area

£110 m construction value

### Key sustainable features



197 new trees and diverse planting/grasses



Zero car policy



1,000+ cycle storage spaces and connects to nearby national cycle routes



Built using a Design for Manufacture and Assembly (DfMA) approach



Site overlooks 211 hectares of protected wetlands



Riverine Walk ecological corridor to protect local wildlife and attract new species



Silver in the 'Best Build-To-Rent' category of the WhatHouse? Awards 2020



First Build to Rent scheme to achieve the Home Quality Mark status from BRE Global



First residential building to achieve WiredScore Gold certification



Secured by Design Gold Award (Metropolitan Police – Designing Out Crime team)



Winner of five HomeViews Awards in 2021 for Rating of Excellence, Design, Location, Management and Facilities

“

Blackhorse Mills is a lovely, uplifting place to live with outstanding facilities, services and environmental awareness at the heart of its ethos

Verified Resident on HomeViews, Blackhorse Mills by Legal & General, Urbanbubble, May 2021

### 3.2 The Architect

# Assael

**Services:** Architecture

**Client:** Legal & General

Regenerating the former Ferry Lane industrial estate, Assael Architecture was appointed to transform the site into an environmentally sustainable residential community. The scheme sits on the edge of Walthamstow Wetlands, a Site of Special Scientific Interest, and consists of 479 homes, including 104 affordable homes.



The brief was to create an exemplar Build to Rent community that met the demands of aspirational residents – providing a high-quality service and lifestyle, not just an apartment. The outcome of Assael's approach showcases best practice design that responds to the Build to Rent business model and the emerging Blackhorse Lane Urban Design Framework.

Using the surrounding environment as inspiration, the design ties into the established green links of the Framework and promotes health and wellbeing through an extensive public realm and enhanced physical and visual permeability to the water. Importantly, it is also sensitive to the adjacent Site of Special Scientific Interest, a migratory bird route providing lots of interest for twitchers.

Sustainability lies at the core of Blackhorse Mills, from the construction and operation of the building to the wellbeing benefits for residents. The scheme was built using a Design for Manufacture and Assembly (DfMA) approach with a highly rational design solution that brought efficiencies to construction and the long-term management and operation of the development.

The dense urban community's proximity to a high-capacity transport hub and minimal car parking also plays an integral role in its sustainability credentials. In addition, the development also provides almost 700 cycle storage spaces and connects to nearby national cycle routes.

The scheme incorporates generous internal and external amenities that support health, wellbeing and home-working. At the heart of the development is a civic space or 'Forum'; a flexible, robust space programmed to include local exhibitions, performances and community events, and with an aspiration to involve and educate local school children and others groups.

In August 2019, Blackhorse Mills became the first Build to Rent community to achieve the Home Quality Mark, a new quality and sustainability certification scheme run by the BRE.

“Blackhorse Mills presented a unique opportunity to create a sustainable community, celebrating its location on the edge of Walthamstow Wetlands and respecting its rich biodiversity. The buildings now buzz with residents enjoying amenities that promote health, wellbeing and local working with almost no car dependency.

*Rory O'Hagan, director, Assael Architecture*

### 3.3 The Consultants



**Services:** Cost, Project Management & Pre-Manufacturing Consultancy – Build to Rent

**Build:** Hybrid - MMC Category 6 & Traditional Construction Integrated

**Client:** Legal & General / PGGM



Cast Consultancy provided cost and project management consultancy to join-venture investors L&G and PGGM on the Blackhorse Mills development. The final build incorporated MMC Category 6 and also involved the early evaluation of multiple other options for pre-manufacturing, including Category 1 MMC, in order to drive labour reduction and productivity improvements on-site.

The scheme benefits from a DfMA (Design for Manufacturing and Assembly) approach and demonstrates the synergy between key Build to Rent design principles and designing for more efficient on-site as well as offsite methods.

#### UK MMC Framework

One of the UK's leading experts on Modern Methods of Construction, Cast CEO Mark Farmer led the Government's MHCLG Joint Industry Working Group on MMC and is currently the Government's Champion for MMC in Homebuilding.

The Working Group defined a framework to aid understanding and advance MMC adoption in the UK residential market. This is now being widely used by Homes England and the industry and is helping to enable more specific discussions to take place on the many different types of MMC techniques as well as allowing data to be captured in a more structured way.

“

Build to Rent has been one of the key catalysts for modernisation in the construction industry. Blackhorse Mills is a case in point, with the very latest thinking applied from the outset in terms of how, with client support, you can drive efficiency into designs that contractors can then translate into pre-manufacturing opportunities and site-based process improvements.

Major investors are increasingly interested in ESG-led projects, and regulatory changes will soon reflect the crucial importance of MMC in reducing the embodied and operational carbon output of new residential buildings. Legal & General are already measuring and proving this at a project level – as seen in the Home Quality Mark status achieved by Blackhorse Mills – as well as at a portfolio level.

The building's WiredScore Gold and Design Gold Awards also reflect the importance of future-proofing new developments. This not only helps to generate the rave reviews we see from residents on HomeViews, but also ensures these buildings remain a strong investment prospect long into the future.

*Mark Farmer, CEO, Cast Consultancy*







“

Our response to the challenges of climate change will define whether our developments long term are a success or a failure. Our residents' technical understanding of a building's environmental performance is increasing by the month and we can see it is starting to influence their decisions around where to live. This trend will only become stronger with environmental performance being a lead indicator of occupier demand.

As a long term investor, many sustainability initiatives make short term as well as long term economic sense. Reducing energy usage in communal spaces and providing on-site power generation lowers CO2 emissions and operational costs. As a long term investor/owner, our objectives are delivered through embracing the changes and improvements required to maximise environmental and social impact.

*Dan Batterton, Head of Build to Rent, Legal & General*

BLACKHOLE



## 4. Sustainability and BTR Investment

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Nick Pleydell Bouverie, Head of Residential Investment Agency,  
Knight Frank provides insights on sustainability within the context of  
investment in the Build to Rent sector.



# Sustainability credentials front and centre for BTR investors

Build-to-rent has established itself as an extremely attractive UK investment class, having demonstrated that the income offered is both highly secure and shows long term appreciation – a rare and valuable commodity in today's world.

The focus for many investors remains on aggregating to scale, with significant attention being given to product evolution – including specification, amenity offering, durability of fit out and digital connectivity.

However, the sustainability and environmental credentials of buildings are also rapidly moving up the agenda.

A number of leading investors in the sector are making a conscious effort to innovate and evolve their approach to investment, which is helping to drive improved performance of buildings.



## Avoiding obsolescence

This increased commitment from leaders across the industry demonstrates the wider significance and importance of the ESG agenda. In particular, there is a growing focus on 'future proofing' assets to ensure maximum liquidity of investments in the years ahead. Central to this, is reducing the risk of obsolescence triggered by future regulation change or shifts in tenant sentiment and preferences.

Over the past year we have seen an increase in the number of investors in the BTR market who are explicitly prepared to pay a premium for schemes with strong environmental and sustainability credentials.

The residential investment sector has long lagged behind its commercial counterparts in applying and benchmarking stringent sustainability standards to properties. The launch of the BREEAM In-Use Residential Scheme last year is a significant step forward for measuring a buildings operational sustainability credentials.

Investors are now also rightly beginning to consider their construction methodology and materials, although – especially in many regional markets – construction costs remain the limiting factor for greatly improving the sustainability of BTR in the short term. In these circumstances, it is likely that only significant legislation change will deliver material improvements.

From a legislation perspective, the Government set out its approach to achieving net zero carbon through the Ten Point Plan, published in November 2020. Among other targets, it dictates that new developments will need to include low carbon heating systems along with suitable walking and cycling routes, and electric car charging points. Alongside this, the Future Homes Standard will require a 75-80% reduction in emissions in new build homes by 2025, with an interim uplift in building regulations taking effect from June 2022.

## Tenant priorities

A key question for investors is whether the sustainability credentials of schemes are really an important consideration for tenants, or indeed whether 'green' buildings can and will command increased rents or improved occupancy. HomeViews data is particularly timely in this regard, and Knight Frank is pleased to have consulted on the questions.

It is encouraging to see the results confirm that residents of new build homes do value sustainable building features. Tangible benefits such as recycling facilities and energy saving measures rank as particularly important in the eyes of both buyers and tenants and are relatively 'easy-wins' which can be incorporated into schemes.

Yet the results also highlight a potential disconnect between investor and end-user priorities.

While important, the use of sustainable construction methods, or a buildings' eco rating rank as less of a concern for both tenants and owners, despite the growing investor requirements we are seeing for sustainable, energy efficient buildings. While investors are prepared to pay a 'green' premium for a building, this suggests that it doesn't necessarily translate into premium rents.

That said, in the long term, we do expect buildings with poor environmental ratings could become less desirable in the eyes of the tenant. Equally, we expect to see that the very best buildings will help drive greater tenant retention, demand and, ultimately, income resilience in the future.

*Nick Pleydell Bouverie, Head of Residential Investment Agency, Knight Frank*





# Working with HomeViews



## Sales and marketing

Use our content and collateral to build your brand, close deals and enrich your marketing message.



## B2B communications

Independent, verified data to support your B2B marketing, pitches and JV/ investor reporting

## Data and benchmarking

Understand your best-performing developments and the reasons why. Benchmark accurately against your competitors.



Book a meeting with our  
**CEO & Co-founder** Rory Cramer  
to learn more about working with us.

From claiming your HomeViews pages and responding to reviews to leveraging our data and insights for your marketing, HomeViews lets you listen to your customers and build your brand.

# Why HomeViews?







## HomeViews Partner Testimonials

Customer feedback is incredibly important to us as we strive to continuously **improve our homes and create welcoming communities** where people enjoy a great quality of life. We are delighted to have received so many positive reviews from verified local residents and will continue to act on these valuable insights.

*Karl Whiteman, Divisional Managing Director, Berkeley Homes*

Our incredible scores are a result of the hard work our team puts into supporting each of our residents and helping many through the process of buying their first home. HomeViews has enabled our residents to **share their experience of buying with Anthology in their own words** and for us to share their stories with prospective customers.

*Steve Bangs, Managing Director, Anthology*

We're benefitting immensely from partnering with HomeViews. Thanks to their support we successfully included review content within the marketing of our rental and sales developments at Greenwich Peninsula. Verified resident feedback helps us maintain the highest possible standards across the board and has been a **genuine source for when new buyers/tenants are researching their next home**. Our HomeViews pages are an invaluable extension of our own marketing channels.

*Keshal Patel, Property Marketing Manager, Greenwich Peninsula*

At Fairview, we see immense value in the data and insights HomeViews provides on customer feedback. Through a strong partnership, we have been able to **boost our visibility and showcase our reviews to prospective residents online**, which has helped develop and grow our brand perception.

*Darren McCormack, Group Sales & Marketing Director, Fairview Homes*