Build Me Up, Level Up

Popular homebuilding while boosting local communities

By Dr Michael Turner and Matthew Lesh

BRIEFING PAPER

EXECUTIVE SUMMARY

- The housing crisis, in which too few homes are being built where people want to live, is holding back Britain's economy, pushing up the cost of living, increasing inequality, contributing to climate change and driving political dissatisfaction.
- Planning reform is perceived to be a devil's choice: allowing more building attracts substantial 'local' opposition while not building enough drives anger among those locked out from housing. This is a false dichotomy. It is possible to build more homes in a way that is popular and electorally beneficial.
- This research paper presents perhaps the most expansive effort to date to identify a path forward on homebuilding.
- **1. Building more homes for a purpose is a big vote-winner**
  - Almost half (46%) of voters say they would be more willing to vote for a party that builds more homes / affordable homes, while one-quarter (26%) would be more open to voting Conservative.
  - Conservatives and Labour would both electorally benefit from commitments to build more homes, but the Conservatives stand to benefit most by attracting younger renters who aspire to own a home but do not feel they can afford to buy.
  - A Conservative commitment to build 2 million more homes — while keeping in design with the local area, improving infrastructure and boosting local services — would lead to a 5 percentage point boost at the ballot box, the equivalent of 1.6 million switching their vote, and restoring the 2019 majority.
- **2. The property owning democracy is at risk**
  - Homeownership has been in decline for decades. But homeownership remains extremely popular. Four-fifths of Brits either already own a home (57%) or would like to own one in the next five years (27%).
  - But three-quarters (75%) of those who would like to purchase a home in the next five years are unsure that they can afford the cost.
  - This has political implications. Almost half (45%) of homeowners vote Conservative while less than one-third (28%) support Labour. By contrast, a majority of those who would like to purchase a home in the next five years but cannot afford to (50%) say that they would vote for Labour today.

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- **3. Housebuilding is most popular when locals benefit and agree**
  - More people support housebuilding in their local area (38%) than oppose it (33%), while a sizable number neither agree nor disagree (25%). The strongest support comes from those who do not own a property, including those who live with their parents and extended families, young families, young couples and single parents, as well as Red Wall voters.
  - Two-thirds of Brits say that they would be more likely to support homebuilding if local residents had the power to agree when they were confident it would benefit their community (71%), if locals were confident that it would bring benefits to their family (67%), and if it meant that local services would see an improvement (68%).
  - The outcomes that drive support for homebuilding most are: if it leads to more investment in local services available in my community; if it leads to more people living and working in the community; if it allows more young people to move out of their parents' homes; if it reduces the overall cost of housing in the area; if it is part of a plan to build all over the country; if it lowers the cost of rents in the area.
- **4. There are many popular ways identified in the research to win support for expanding homebuilding**
  - There is strong support for the zoning system (60%) proposed in the Government's Planning for the Future white paper; majority (52%) support for the 'Infrastructure Levy' replacing affordable housing requirements; and reducing red tape to help smaller and medium-sized builders (58%).
  - The most popular measures are building on brownfield (former industrial) sites (75%) and unused public land (63%) and allowing villages to build new homes nearby, if they choose to (59%).
  - There is backing for automatic permission for converting offices (58%) and almost a majority for converting high street shops (48%) or allowing council tenants to transfer their 'Right to Buy' discount to purchase another property in a different location (49%).
  - There are twice as many people in support of street votes (48%) compared to those who oppose (22%) with a large number who neither support nor oppose the proposal (31%).
  - There is clear majority support (58%) for granting permission for the building of mansard roof extensions, with very few (14%) opposed.
  - There is also majority support for setting national housing targets (52%) though support declines for housing targets set in resident's local area (38%) or on their street (30%).
  - Brits are least supportive of initiatives to build on the 'Green Belt' (20%) even when they are within walking distance of train stations (29%). However, a clear majority of voters have an incorrect understanding of what the Green Belt actually is (52%) or they cannot say (14%).
- **5. It is possible to turn Nimbys to Yimbys**
  - The population can be segmented into:
    - **Yimbys** (36%) or 'Yes In My Back Yard' - This group supports more housebuilding nationally and locally. They are younger, don't tend to own homes and are open to switching their vote to a party that will build more homes.
    - **Blockers** (18%) - This group opposes more homebuilding both nationally and locally. They tend to be older homeowners who have

a strongly negative disposition towards development and housebuilding, they are unlikely to support many, if any initiatives.

- **Nimbys** (13%) or 'Not in My Back Yard' - This group supports more housebuilding nationally, but opposes more development and building homes locally. They are open to many initiatives designed to increase housebuilding but are concerned about maintaining local control and the quality of local amenity and services, and are sympathetic to the needs of families and for young people to leave the family home.
- **Opportunists** (2%)[1] - This group is very small and tends not to support a target for national housebuilding, but supports more homes being built in their local area.
- **Passives** (31%) - This group does not have a strong opinion on homebuilding and tend not to be as engaged in politics and elections.

- **Yimbys** support housebuilding of almost any nature. **Nimbys** can be persuaded to support housebuilding if they feel in control and there are local benefits. **Blockers** are firm in their skepticism about more development — but are less then one-in-five. **Passives** are less engaged and tend to be indifferent.

1 Caution - please interpret insights with care. Very small sample size for group "Opportunists"

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Fieldwork Dates

5-8 September 2021

Data Collection Method

The survey was conducted via an online panel approach. Invitations to complete the survey were sent to members of online panels at random.

Population Sampled

Adult residents living in Great Britain.

Sample Size

n = 1,545 in Great Britain

Weighting

Data are weighted to match the profile of the adult population living in Great Britain.

Weighting targets for the results include; age-sex interlocking, region/nation, level of qualification, 2019 General Election vote, and 2016 EU Referendum vote. Targets were derived from statistics collected by the Office for National Statistics (ONS), as well as the final results of the 2019 General Election and 2016 EU Referendum.

Margin of Error

After calibration weighting is taken into account, the maximum margin of error for this poll at the 50% estimate, is +/- 2.8% when analysing topline results.

Caution should be taken when analysing subsamples, as these figures will be subject to significantly higher margins of error.

In particular, inferences drawn from small subsamples (n<=75) should be treated with caution.

The United Kingdom has a housing crisis. Put simply, there are too few homes being built where people want to live.

This is having a huge impact. It has meant that people are spending more of their incomes on housing, leaving less money to enjoy their lives, to invest in more productive uses, and delaying the dream of homeownership for many.[2] It is dragging down Britain's productivity by making it more difficult for people to live near where they can access the best paying job for them, and prevents the innovation that comes from when highly skilled and productive people live near each other.[3]

The housing crisis is also increasing inequality, between those who were lucky enough to be born earlier, where purchasing a home meant they could benefit from rising prices, and younger generations who are struggling to afford to get their foot on the homeownership ladder.[4]

It is leading to young couples choosing not to start a family because they do not feel they are able to afford an appropriate size home to start on, meaning fewer children every year.[5]

It has led to longer commutes and poorer quality housing that not only decreases people's quality of life but also makes a substantial impact on the climate.

Then, as we have seen during this pandemic, when people squeeze themselves into homes that are too small, that's where illness spreads best, contributing to increased health inequality.[6]

The housing crisis was avoidable. It has been driven by a planning system that fails to allow enough houses to be built. Fixing this problem could deliver huge benefits. Economic historian Professor Nicholas Crafts, estimates that fixing the planning system could boost Britain's GDP by more than 20%.[7]

The benefits are clear. But reforming the planning system has proven to be a tragic political bind that has led to a chronic failure to meet demand. There have been various efforts to tackle the housing crisis. Just in the last decade, there was the first effort during the Coalition years, then during the May Government and most recently the 'Planning for the Future' White Paper.[8]

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2 https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/housingaffordabilityinenglandandwales/2020

3 https://www.aeaweb.org/articles?id=10.1257/mac.20170388

4 https://journals.sagepub.com/doi/abs/10.1177/00031224211027800?journalCode=asra&

5 https://www.adamsmith.org/news/children-of-when

6 https://jamanetwork.com/journals/jamanetworkopen/fullarticle/2783544

7 https://static1.squarespace.com/static/56eddde762cd9413e151ac92/t/5f9869e7f8d2f740b7201336/1603824106458/Home+Improvement+-+Fixing+England%E2%80%99s+broken+planning+system+once+and+for+all+-+28+October+-+Final.pdf

8 https://www.gov.uk/government/speeches/housing-the-next-generation https://www.gov.uk/

Politically, planning reform is perceived to be a devil's choice. No matter what a government does on the issue, it feels as if they can only lose. On the one hand, building more homes is considered to be electorally toxic because of inevitable opposition from homeowners, who are fearful of disrupting the character of their community by bringing more people into their community.[9] Naturally there will also be those who are simply opposed to any risk of the reduction in value of their property.

On the other side, not building enough homes is driving anger among dissatisfied renters, spending large amounts of their income on rent, 'locked out' of the housing market by high prices, lacking any substantial assets that could provide them with a stake in society or connection to their local community.[10] This is simply because renting is too expensive and is more transitory by nature. Those who stay in one place longer are more likely to build networks, know their neighbors and have a stronger sense of belonging to a particular community. There is concern that the loss of a 'property owning democracy,' undermines Conservative party support among younger voters, which could have longer term electoral implications. If fewer people have a bricks and mortar stake in their community, then there will be fewer people wanting to conserve it.[11]

Our research shows that this is a false dichotomy. It is indeed possible to build more homes in a way that brings on board homeowners and those who aspire to own. This research paper presents perhaps the most expansive effort to date to identify a path forward on homebuilding. The results and analysis presented in this paper unpack the political implications of building more homes, but also outlines a way forward politically.

The first section demonstrates how building for a purpose could deliver a substantial electoral payoff, on both sides of the political aisle. The second section shows how property ownership becoming less attainable is having political implications. The third section identifies the circumstances in which building more homes can be well supported, and why. The fourth section shows how the public responds to specific reform proposals. The final section presents a new segmentation analysis with respect to attitudes on building and planning, these segments are the: Yimbys, Blockers, Nimbys, Opportunists and Passives.

In summary, the number of people who want to see more homes being built far outweighs the number who oppose it, and the results show that many of those who oppose building more homes in their own community can be converted. Home-

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government/collections/housing-white-paper https://www.gov.uk/government/consultations/planning-for-the-future

9 See, for example, https://www.newstatesman.com/politics/2021/08/nimbyism-might-win-elections-but-it-will-still-ruin-us-all; https://www.gbnews.uk/gb-views/amersham-and-chesham-the-first-brick-to-fall-in-the-blue-wall/106911;

10 https://www.thetimes.co.uk/article/tories-will-lose-unless-they-build-more-homes-9hznqmllj; https://www.insidehousing.co.uk/comment/comment/housing-has-played-a-role-in-the-conservatives-fall-in-london-and-rise-in-the-red-wall-70415; https://capx.co/a-building-blitz-in-the-south-could-be-the-tories-ticket-to-hegemony/

11 https://www.newstatesman.com/politics/uk-politics/2021/05/how-tory-dominance-built-home-ownership

building can be a policy that wins a huge number of votes, but only if it understands that homebuilding is a means, not the end.

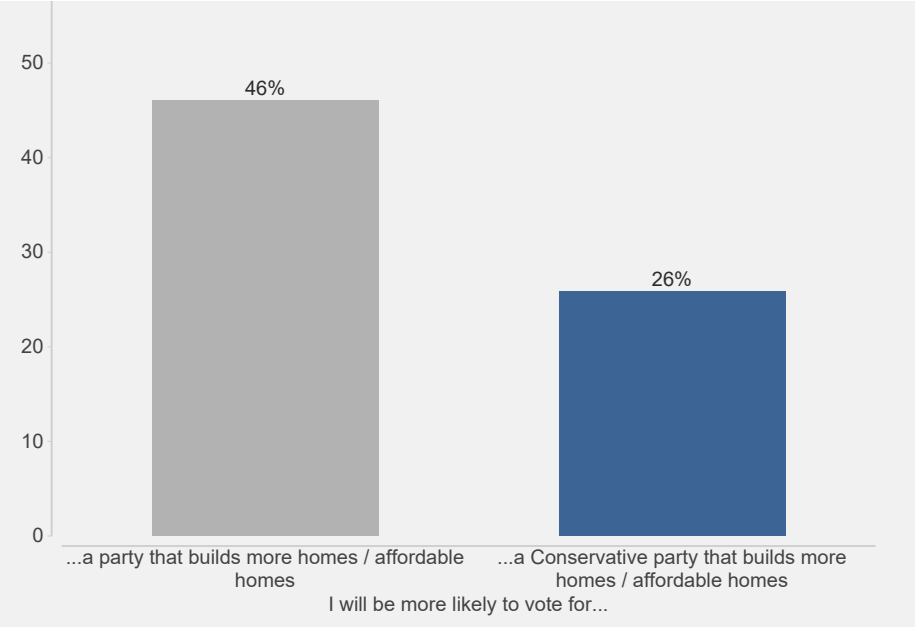
1. BUILDING MORE HOMES FOR A PURPOSE IS A BIG VOTE-WINNER

We have tested the extent to which housing is a central issue for voters and whether commitments on building could have a material impact on popular support for the Conservatives and Labour.

When asked directly, almost half of voters (46%) say they would be more likely to vote for a party that commits to building more homes (See Figure 1). When the Conservative Party is specified, one-quarter of voters (26%) say they are more likely to vote for them. That's more than 8 million people. On the face of it, a commitment to more homebuilding, at least in general terms, has the potential to turn the heads of many voters.

FIGURE 1: % WHO SAY THEY WILL VOTE FOR A POLITICAL PARTY/ THE CONSERVATIVE PARTY IF THEY COMMIT TO BUILD MORE HOMES / AFFORDABLE HOMES (LIKELY VOTERS)

I would be more likely to vote for...



However, political commitments do not tend to operate in a vacuum, and the promise of building more homes can be committed to by both of the main Westminster parties in Britain, the Conservatives and Labour. Also, it is important to consider that lending your vote to a party is much more important when the outcome is clear.

To get a better read of how a commitment to build may play out, and whether there are benefits for both sides of Westminster politics, voters were asked which

national Government they would prefer under various manifesto commitments on homebuilding (See Figure 2).

This was an experimental design approach, with respondents allocated one scenario at random. It was a double blinded process. There was one control scenario and three 'treatments'.

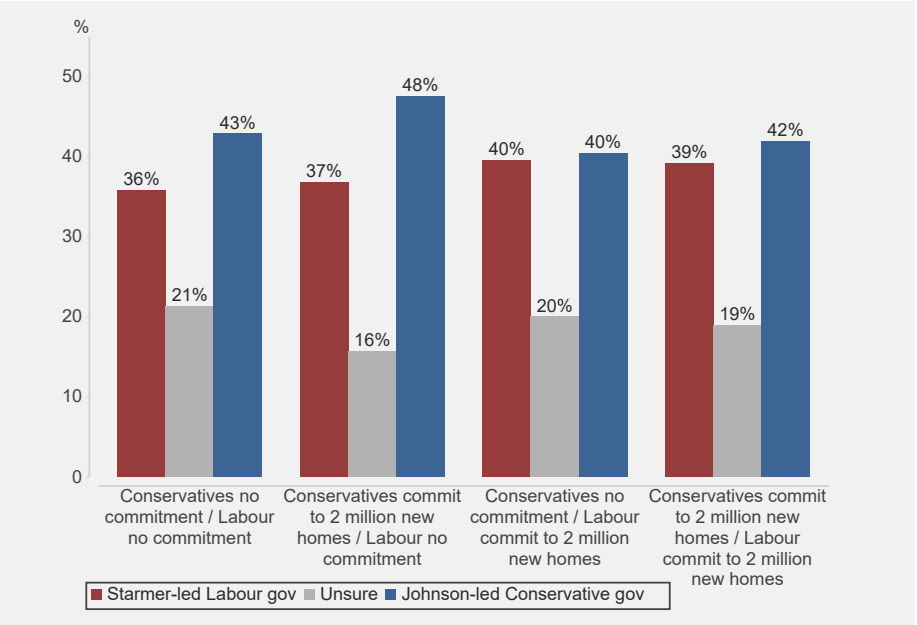
In the control scenario neither party made a commitment to build more homes. In the second scenario, it was the Conservatives who committed to build 2 million more homes while Labour made no commitments. In this scenario it led to a substantial 5 point bounce in support for a Conservative government, an 11 point lead over Labour. However, the results also show that when Labour commits to build the same number of homes, while the Conservatives make no commitment, support for a Labour government receives 4 point bounce, and there is a 3 point decline for the Tories, leading to support for both Governments at similar levels.

In the final scenario, where both parties commit to building more homes, although support for a Labour Government receives a 3 point bounce while the Conservatives remain unchanged, statistically, support for a Conservative Government maintains a lead over Labour.

For both parties the electoral calculus is clear, Labour and Conservatives are both better when they commit to building more homes.

Figure 2: % preferred national government under various homebuilding commitments (likely voters)

We would now like you to consider the following scenario. Ahead of a General Election, both major parties have made manifesto commitments on their housing policies should they win power.

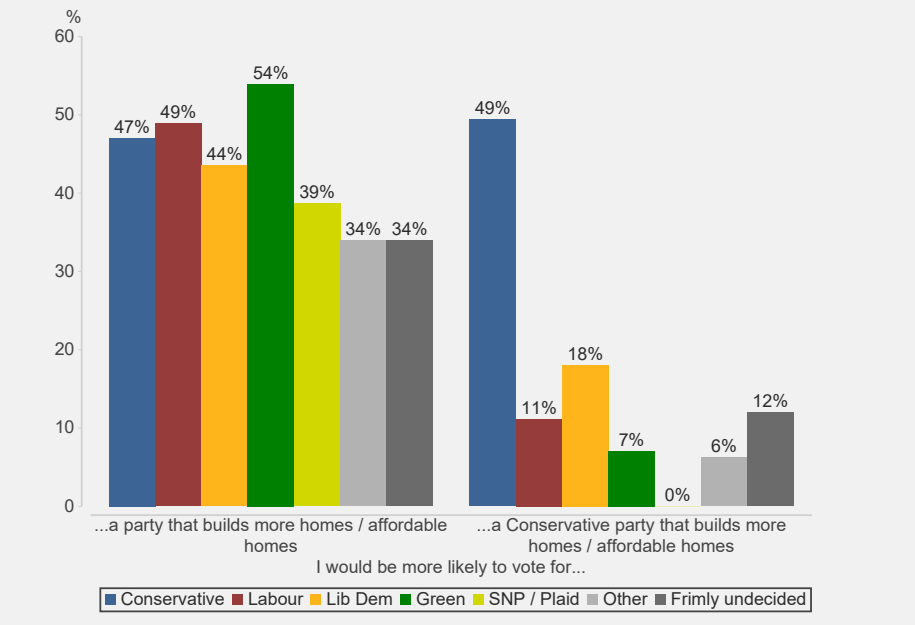


A clear commitment to build more homes has the potential to be a substantial vote-winner, for both parties, but particularly the Conservatives. This is because many

people who do not yet own a home, but aspire to are currently Labour and Liberal Democrat voters, and it is this group who are most susceptible to switching their vote to a party that commits to build more homes (See Figure 3). One-in-ten Labour (11%) voters and almost one-in-five (18%) Liberal Democrats say that they would be more likely to vote for the Conservative Party if they promised to build more homes.

Figure 3: % who say they will vote for a political party/ the Conservative Party if they commit to build more homes / affordable homes (likely voters) by current voter type

I would be more likely to vote for...



Finally, in order to get an accurate measure of the potential electoral uplift that the current Conserative Government could achieve simply by committing to build more homes, voting intentions were collected under two different scenarios. The current context, and under a scenario where the Conservatives commit to build more homes in a way that keeps with local design, improves infrastructure, provides more local services and increases home ownership.

Under this scenario this would lead to a significant proportion of voters switching over to the Conservatives (see Figure 4).

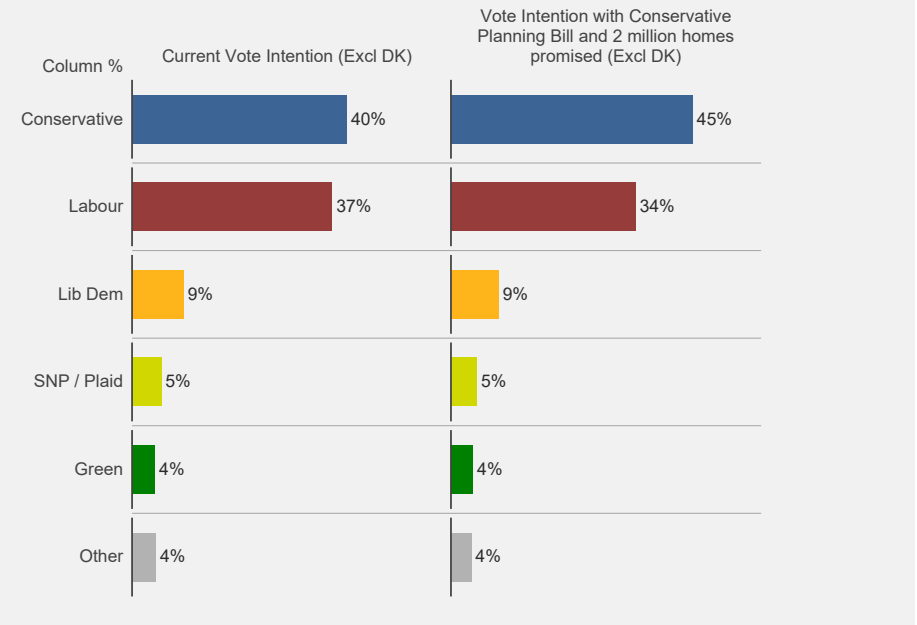
In this context, a Conservaitve commitment to build 2 million homes over 5 years (400,000 per year) would lead to a 5 percentage point boost in vote share for the Conservatives and transform a 3 point lead over Labour into a significant 11 point, 70+ seat majority, similar to that achieved in 2019.[12] This is the

12 Estimated seat majority based on calculations from Martin Baxter's Electoral Calculus user-defined poll tool (www.electoralcalculus.co.uk)

equivalent of more than 1.6 million voters switching over to the Conservatives.[13]

Figure 4: Voting intention and voting intention after prompting and messaging on Conservative Planning Bill (Excl DKs)

Earlier you said that you would vote for [INSERT PARTY HERE]. Imagine that the Conservative party commits to building 2 million more homes nationally, including more homes in your community, that were in-keeping with the design of your area, that led to more home-ownership, improved infrastructure and better access to local health and community services. Considering this information, how would you vote?

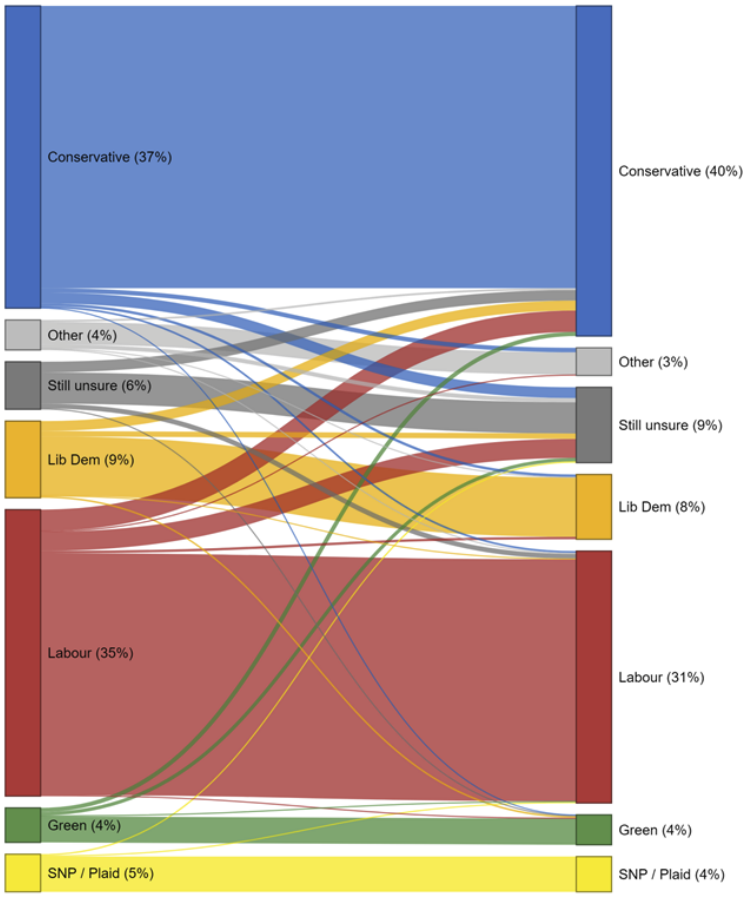


The results show that a Conservative Party that commits to build more homes in people's communities, in a way that levels up by delivering desirable outcomes for residents, has the double effect of taking on direct Labour and Liberal Democrat switchers, while also creating indecision among Labour supporters.

Very few Conservative supporters change their mind about who they would vote for, and fewer still switch to another political party, with the vast majority of the small fraction of Conservative switchers, switching to undecided. What little vote is lost, is replaced several times over by Lib Dem and Labour switchers.

13 Based on 2019 General Election turnout.

Figure 5: Voting intention flows from baseline and to vote intentions after prompting with messaging on outcomes of Conservative Planning Bill (total)



Deeper analysis of the results shows that one-in-nine 18-34 year olds (11%) who are likely to vote, go on to switch their vote to the Conservatives after hearing about the initiative. As do more than one-quarter (28%) of those who are currently living with their parents or extended family.

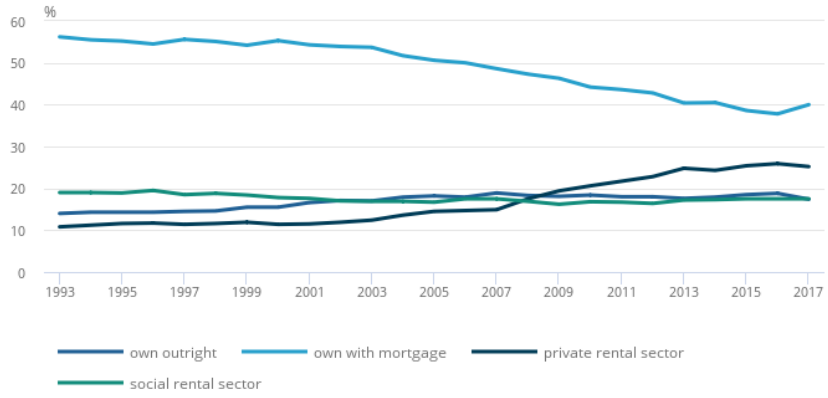
Voters most likely to switch are those who say that they would like to own a home but cannot or are unsure if they can afford to. This group represents about 15% of the adult British population, but 43% of all switchers. That being said, a similar proportion of switchers are actually homeowners (43%), so while there are clear aspirational motivations driving switching behaviour, a significant number of people who own homes also see value in the commitment.

Perceptions may have played a part in keeping some of these voters away from the Conservatives in the past as results suggest that many of those who did switch over to the Conservatives, initially felt that Starmer and the Labour Party would be most likely to build more homes.

Homeownership in the United Kingdom has been in decline for decades, with a substantial growth in the private rental sector.[14]

FIGURE 6: HOMEOWNERSHIP HAS DECREASED OVER SEVERAL DECADES FOR PEOPLE AGED UNDER 65 YEARS

Housing tenure over time, for ages 16-64 in England 1993-2017



Source: Ministry of Housing, Communities and Local Government - Survey of English Housing (1993 to 2007), English Housing Survey (2008 to 2017)

The demand for homeownership remains extremely strong. Four-in-five Brits either already own a home (57%) or would like to purchase one in the next five years (26%). Similarly, just one-in-five (20%) agree that owning a home is not important and would be willing to rent permanently. Homeowners tend to be substantially older.

Affordability is a major barrier to homeownership. Three-quarters (75%) of those who would like to purchase a home in the next five years are unsure that they can afford the cost. This is in the context of house prices rising substantially faster than inflation and a lack of housebuilding in the places where people want to live in order to fill the gap.[15]

Those that own their home are shown to have better relationships with their neighbors compared with renters and are more likely to say that their area where they live is desirable.

This is having very real political implications. Almost half of homeowners (45%) vote Conservative while just over one-quarter (28%) say that they support Labour. Around one-in-ten (10%) are currently supporting the Lib Dems. In contrast, just one-fifth of those who plan to buy in the next five years or are in the process of buy-

14 https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/ageing/articles/livinglonger/changesinhousingtenureovertime

15 https://sambowman.substack.com/p/its-the-supply-stupid

ing (23%) say that they support the Conservatives, and among those who would like to buy but cannot afford it is just one-quarter (25%).

Currently, half (50%) of those who want to buy a home but cannot or are unsure if they can afford to do so are Labour voters, while over half (55%) of those currently looking to buy would choose Labour. That means people who want to own a home but cannot afford to do so are 2.5 times more likely to vote Labour than Conservative.

3. HOUSEBUILDING IS MOST POPULAR WHEN LOCALS BENEFIT AND AGREE

Just because building more homes could be a big electoral vote-winner, particularly among younger generations, does not mean that it is universally popular. It is well known that Britain's built-up environment is a contentious policy issue. We have sought to determine the level of support for housebuilding, and what is driving support and opposition.

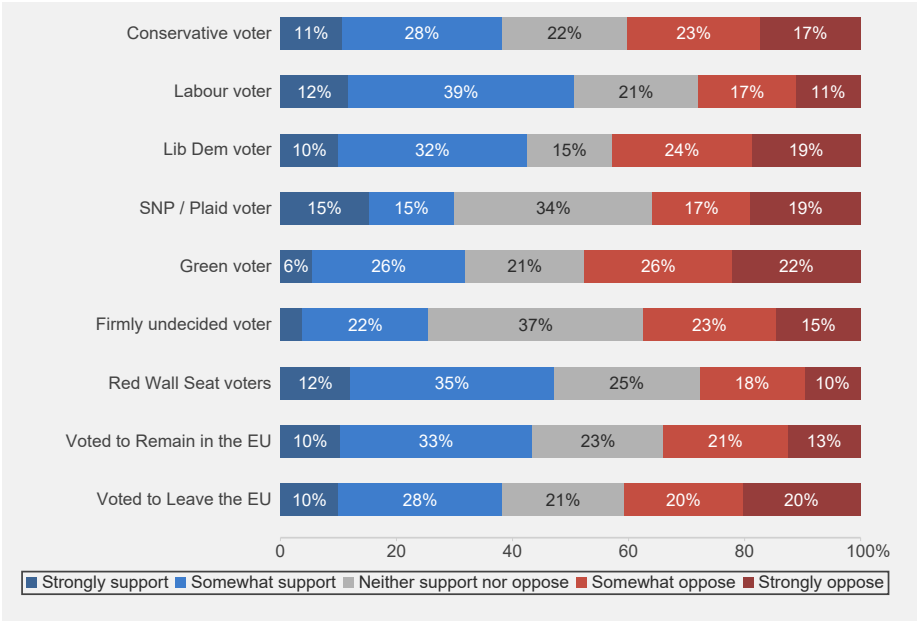
Support for homebuilding varies based on people's previous experience and personal circumstances

More people support housebuilding in their local area (38%) than oppose it (33%), while a sizable number are uncommitted, saying that they neither agree nor disagree (25%). Labour voters are most supportive of building more homes (48%), closely followed by Liberal Democrat supporters (47%) who are more likely than Conservative voters (39%) to support housebuilding in their local area.

Green voters are the least likely to support (27%) and most likely to oppose building more homes (43%). Those living in Red Wall seats are one of the most likely groups to support building more homes (43%).

Figure 7: Support for more housebuilding by political groups

Do you support, or oppose, more homes being built in your local area? (VALID)



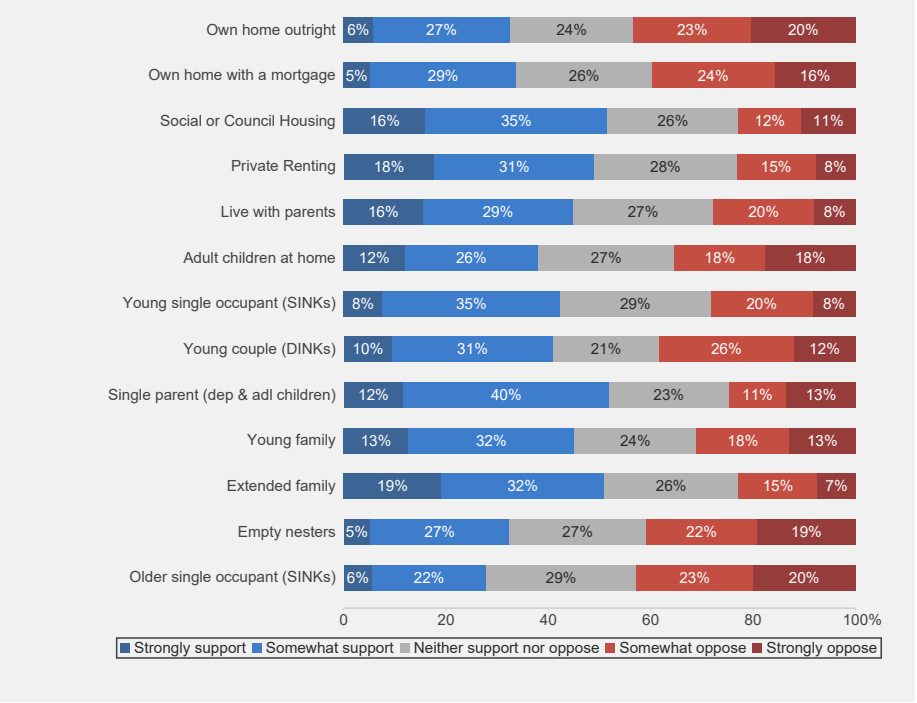
It is existing homeowners, empty nesters and older single occupants who are least likely to support homebuilding in their area (approx. one-third across these groups).

Private renters, social housing tenants and those living with their parents, which is estimated to be approximately 33% of those aged 18-34, or 4.8 million residents in

the UK, are shown to be most supportive.[16] A majority of single parent households and those who are living with their extended family say that they support more homes being built in their community.

Figure 8: Support for more housebuilding by living arrangements and lifestage

Do you support, or oppose, more homes being built in your local area? (VALID)



Respondents were also asked whether they felt building more homes in their area would have a positive or negative impact on their local community. Overall, about one-third believe it will have a positive impact (32%) and a similar proportion believe it will have a negative impact (34%).

But with respect to generations, there is a very large difference in the way that older residents view the impact of more homes locally, compared with younger residents. A clear majority of those aged 18-to-24 (57%) believe that building more homes locally would have a positive impact, compared to just one-in-five (21%) of those aged 65 and over. Londoners are almost twice as likely to say it will have a positive impact (46%) as negative (25%), and those living in the South East are most likely to say it will have a negative impact (46%).

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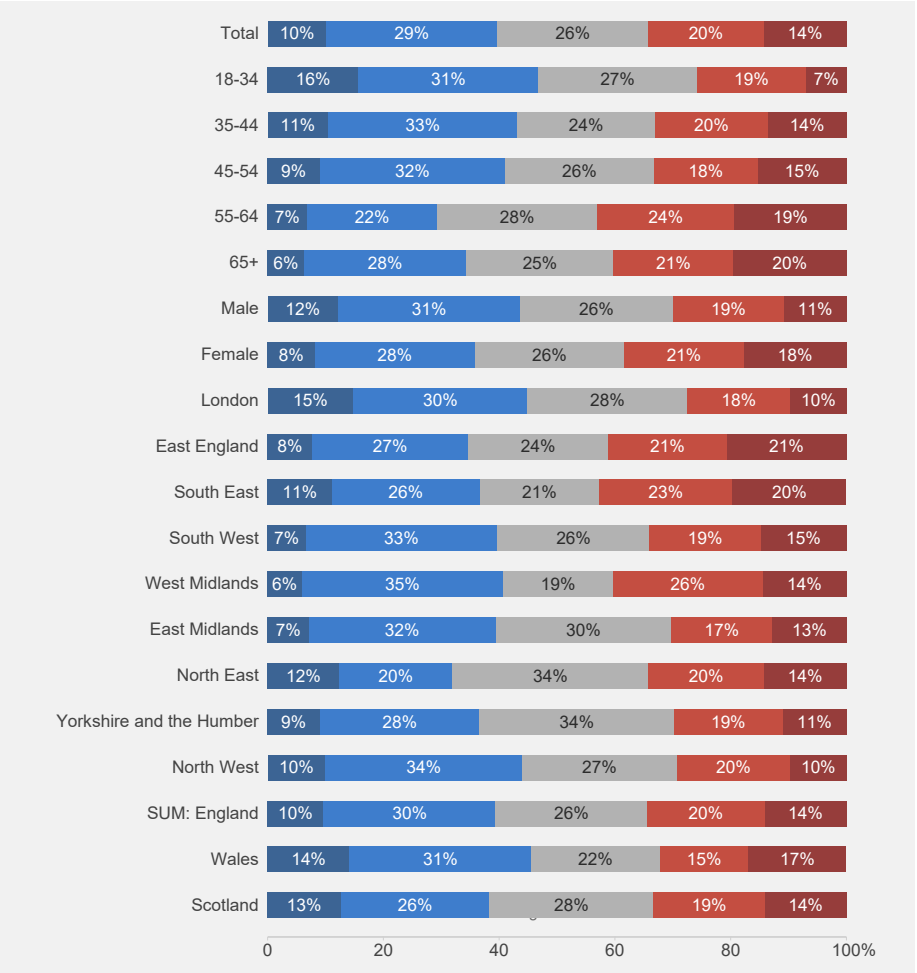
16 Source: Office for National Statistics - Labour Force Survey (LFS) 2020

Figure 9: Will more homes have a positive, or negative impact on the local community?

In your view, if more homes were built in your area, would that have a positive, or negative affect on your local community, if any at all? (VALID)

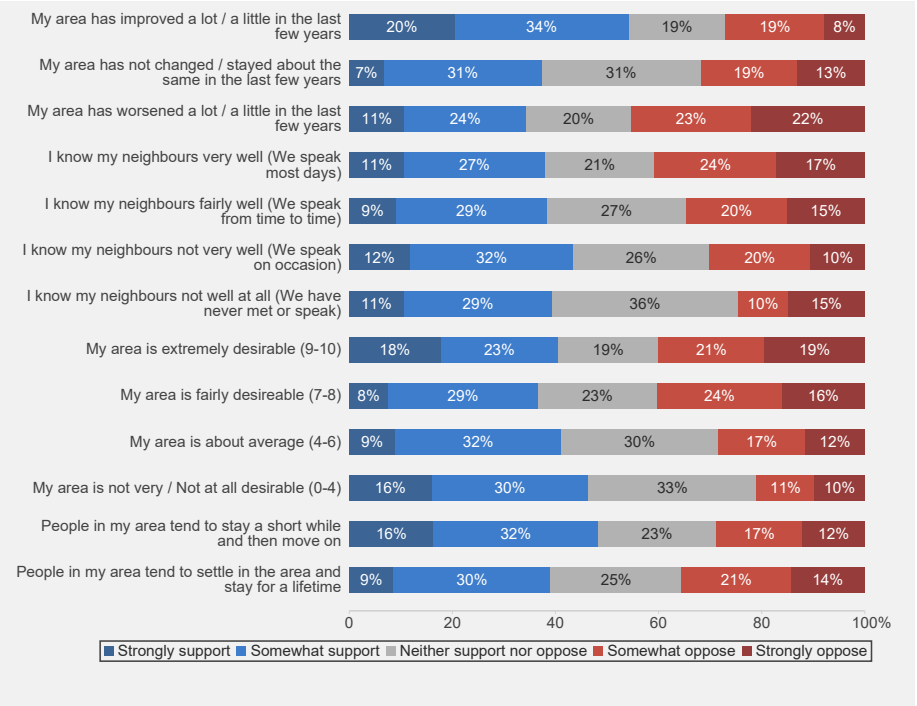


How an area is felt to have changed makes a very big difference to residents' buy-in on further development in their local area. A clear majority of those who believe their area has improved in the last few years (53%) say that building more homes in their area will improve it further. Around half of those who feel their area has gotten worse (49%) feel that more development will only make the area worse again. This suggests that the success or failure of other developments may have a substantial impact on buy-in for the next development. Getting the first ones right can generate support for more. Failures will breed strong resistance and community opposition.

How well people know their neighbours does not significantly affect levels of positivity about local homebuilding, but it is strongly associated with negativity. The more people know their neighbours, the greater the level of negativity about local development. Those who say that they know their neighbours very well are 20 points more likely to say that building more homes locally will have a negative impact on the local community.

Figure 10: Will more homes have a positive, or negative impact on the local community?

In your view, if more homes were built in your area, would that have a positive, or negative affect on your local community, if any at all? (VALID)



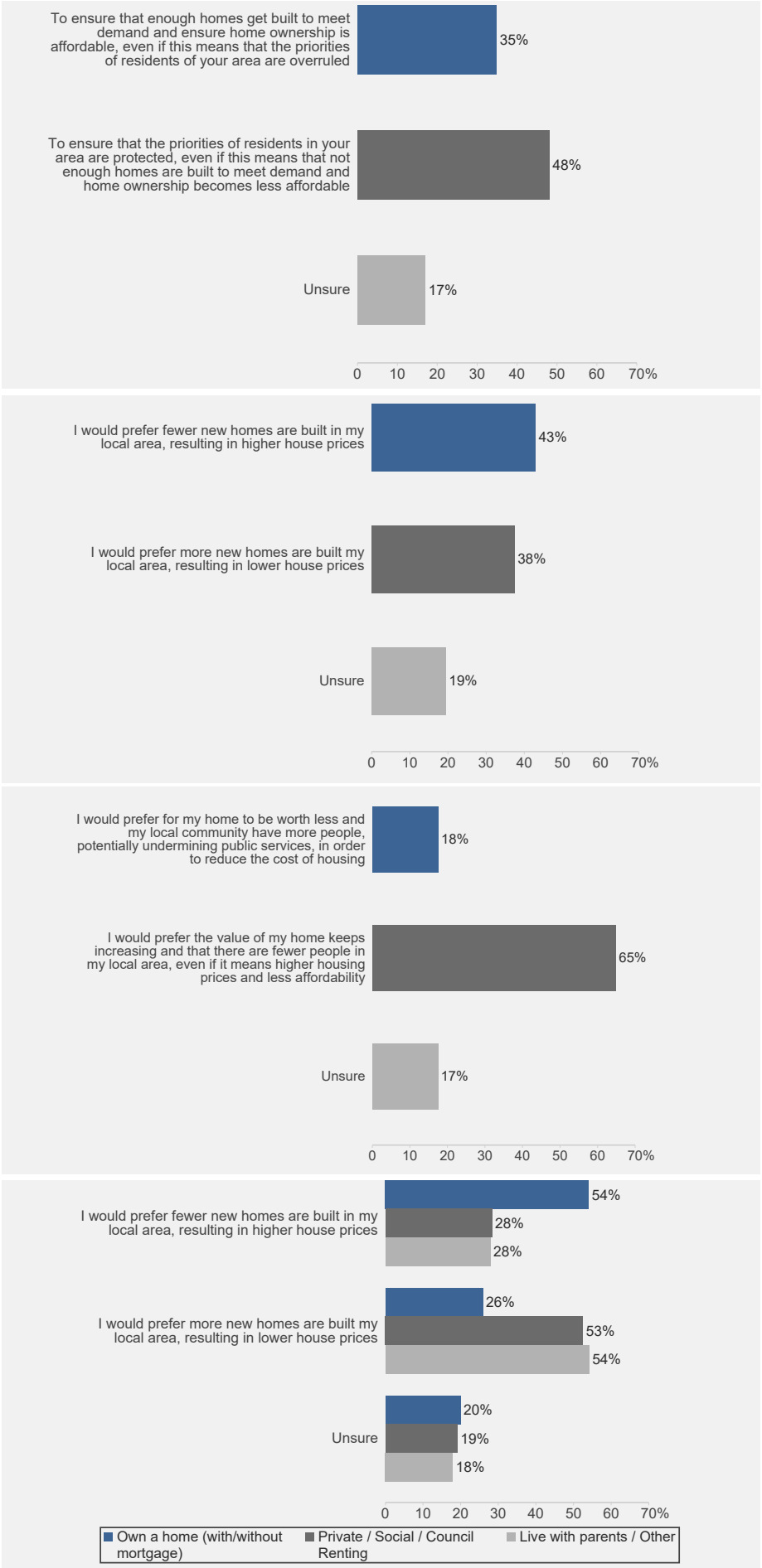
Blocking development is asset protection

A series of 'trade off' questions were put to respondents. These focused on key aspects of the planning system. When given the choice between protecting house prices but not building enough homes, and building enough homes resulting in lower house prices, it is unsurprising that a majority of homeowners (54%) support the former, while renters support the latter (53%). It's this simple numbers game (home owners outnumber renters) that leads to support for fewer homes being built (43%) just slightly edging the proportion who would like to see more homes be built (38%).

Relatively few people actually engage directly with the planning system. Around one-in-six have applied for planning permission (17%). A similar number have objected to a planning application (16%), with the most likely to object being those aged 65 and over (24%) and those who own their home outright (23%).

There is also little willingness to sacrifice democratic local control. A majority say that they would prefer the merit of every development be carefully considered by their local council (52%) compared to just over one-third (35%) who are happy to see every proposal that follows the rules, including the local and neighbourhood plan and building regulations, receive automatic approval. Also, few residents are willing to accept their home being worth less and local services being undermined in order to reduce the cost of housing (18%) compared to those who would like to see their home value keep going up, leading to fewer people and reduced affordability (65%).

Figures 11, 12 , 13 & 14: Trade-off questions



Building is popular when the benefits are made clear

This highlights the fundamental challenge with respect to planning reform. A majority of the population are homeowners, who arguably have little interest in the price of their largest asset being affected for the benefit of others, or the community and stretched local services being disturbed by newcomers.

This does not, however, mean people are unwilling to support more housing or reform in any circumstance. Quite the opposite. It simply reflects the need, politically, to demonstrate how homebuilding materially benefits existing homeowners, and be undertaken with the agreement of local residents.

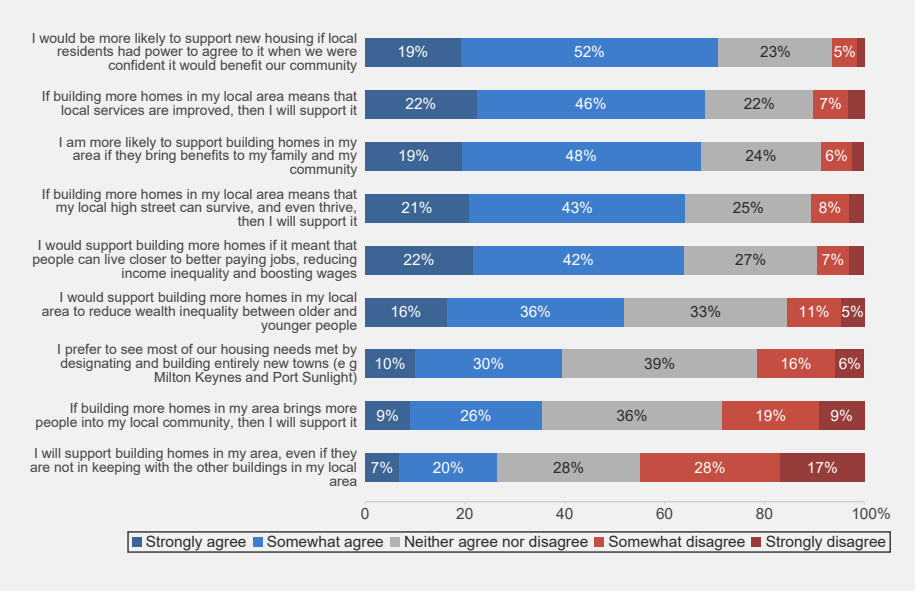
There are a number of circumstances where people are willing to support more homebuilding in their local community. Almost three-quarters of Brits say that they would support more homebuilding if local residents had power to agree and were confident that the development would benefit their community (71%). If building more homes in people's communities meant that local services would improve then more than two-thirds say they would support it (68%). And if residents believe that homebuilding in their area would bring benefits to their family and community, then two-thirds say they would be more likely to support it (67%).

There is also strong support for housebuilding if it is seen to help protect the local high street (64%), is in keeping with other buildings (64%) and would lead to people living closer to better paying jobs, reducing income inequality and boosting wages (64%). There is also some interest in reducing wealth inequality with housebuilding (52%).

There is significantly less support for housing to come principally from the building of entirely new towns the likes of places like Milton Keynes and Port Sunlight (40%) or if those buildings are not in-keeping with others in the community (27%).

Figure 15: Views about homebuilding and support for building in the local community

Do you agree, or disagree, with the following statements? (VALID)

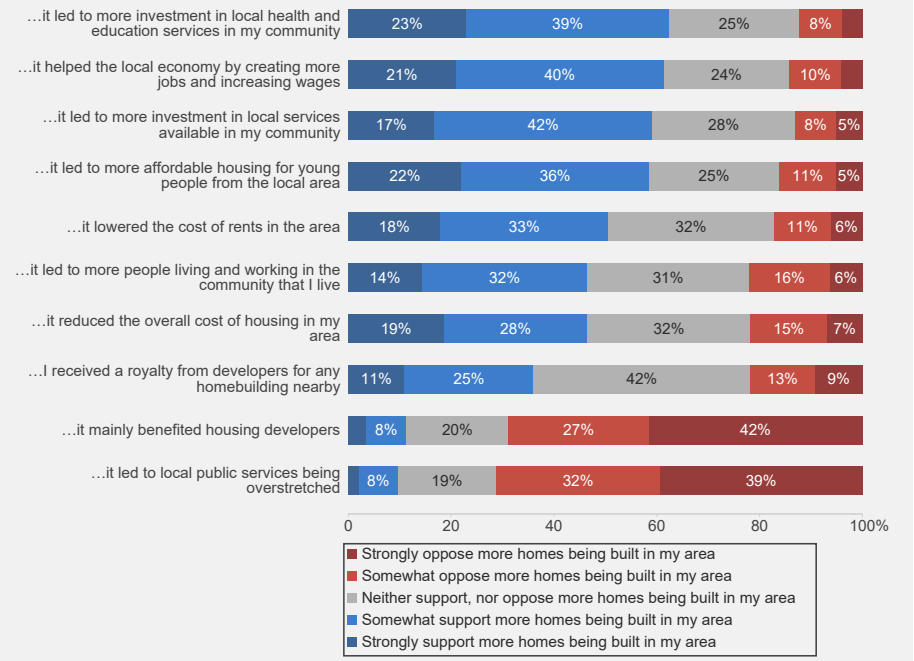


Respondents to the study were asked whether they would be more likely to support, or oppose housing being built in their local area under a range of circumstances. There is a strong majority support for housing being built if residents felt that it led to greater investment in local health and education services (62%), if it were felt to help the local economy and create jobs (61%), if it were felt to lead to more investment in local services (59%), and created more affordable housing for young people from the local area (58%).

In circumstances where the personal and community benefits are clear for residents, support for homebuilding in the community rises substantially, and opposition fades.

Figure 16: Conditions for supporting, or opposing the building of more homes in the local community - Economic, investment and financial outcomes

Would you be more likely to support, or oppose, housing being built in your local area if… (VALID)



There are other drivers of support too. If development is believed to help the environment by reducing the amount of time that people spend commuting in their cars a clear majority of residents say they will support more building in their area (57%), just 16% oppose.

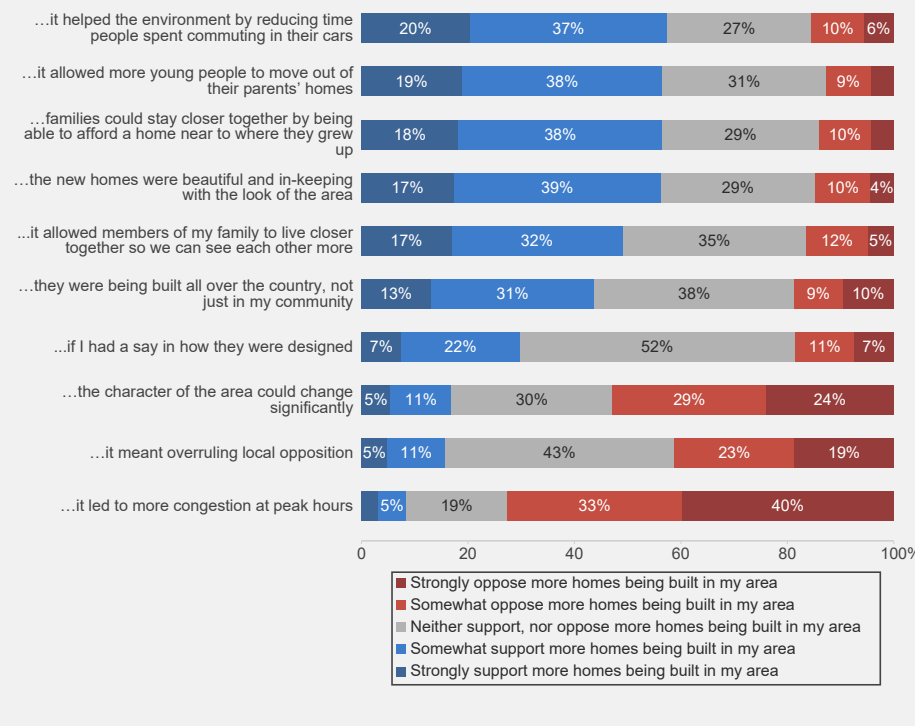
Looking after the interests of families is another strong driver. Housing to help young people get on and move out of their parents' homes is as strongly supported as environmental factors (57%), as is the demand to facilitate families who want to stay closer together (57%).

A majority of voters also say that they will support the building of new homes in their community if they are beautiful and in-keeping with the look of the area (56%) and if it lowers the price of local rents (51%).

The overwhelming majority of residents say that they will oppose building more homes in their community if local residents feel that it will lead to greater congestion (73%), or if the character of the area could change significantly (53%). A significant minority also say they are most likely to oppose local development if they feel they are being overruled (42%).

Figure 17: Conditions for supporting, or opposing the building of more homes in the local community - Local environment, character and community outcomes

Would you be more likely to support, or oppose, housing being built in your local area if... (VALID)



To identify the most effective drivers of support for building more homes, each outcome presented to respondents has been plotted on the chart contained in Figure 18, below. NET support is plotted on the x-axis, against the individual impact of that outcome on support for homebuilding in their local community, controlling for all other outcomes and several demographic factors.[17]

There are several conditions for homebuilding that are strongly supported by residents, but fewer are shown to have a significant impact on unconditional support.

For instance, outcomes that are shown to have the biggest impact on unconditional support for more homebuilding in the community are: if building more homes is

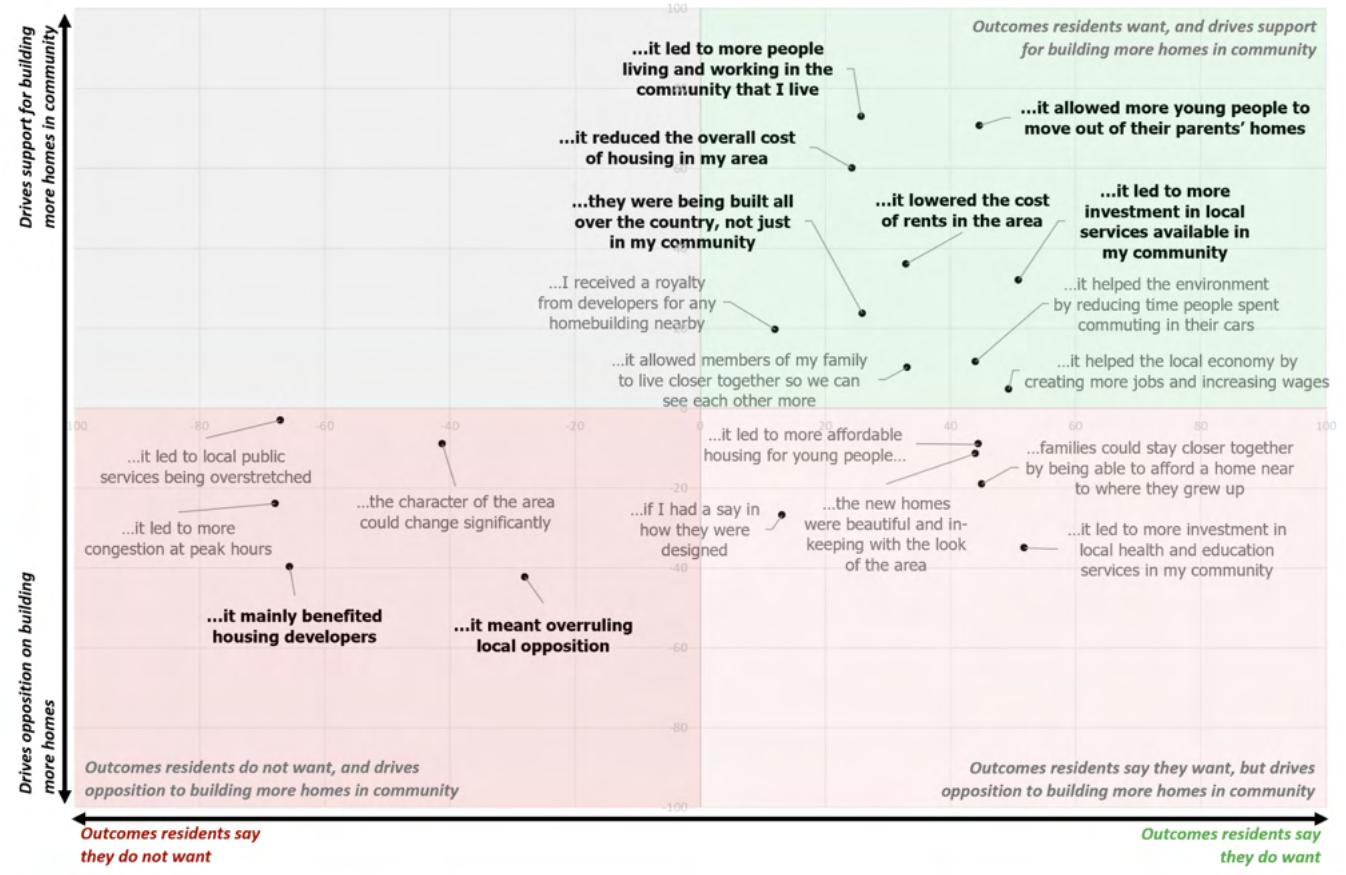
17 Binary logit regression was utilised to determine the individual impact of each outcome on overall support for building more homes in the community

believed to lead to more investment in local services; if building more homes is felt to lead to more people living and working in the community; if building more homes allows more young people to move out of their parents' homes; if it reduces the overall cost of housing in the area; if it is part of a plan to build all over the country; and if residents believe that it will lower the cost of rents in the area.

Opposition to building more homes is driven mainly by the belief that the benefits go to housing developers most, and that development means overruling local opposition. This indicates the need, for advocates of building more homes, to use a 'carrot' with local residents, and not take the 'stick' approach to housing reform. Top-down mandates are instinctively opposed by residents, while housing that delivers across a range of desirable areas for the community is shown to achieve popular support.

Figure 18: Drivers of support and opposition for more homebuilding

Driver analysis: Drivers of support for building more homes [X-axis = NET support for more homebuilding based on condition / Y-axis = effect on overall support for building more homes in local community]



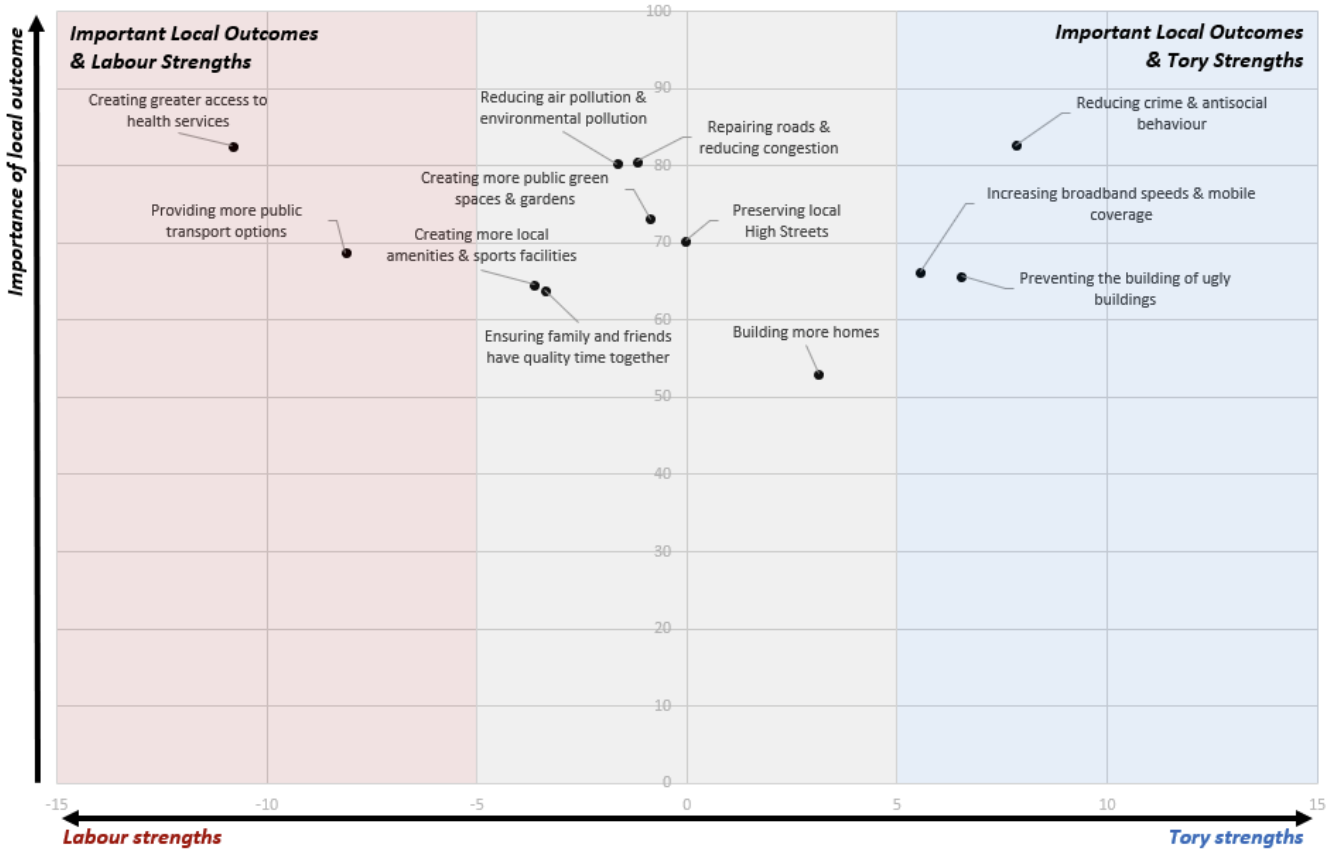
Building more homes should be anchored to other local priorities

When compared to other local priorities for residents, although building more homes is considered to be important, other more universal concerns tend to place slightly higher. Reducing crime and antisocial behaviour, creating access to health services, and repairing roads and reducing congestion are the top local priorities for residents.

Therefore, to create more support, residents need to believe that building more homes in their community is a solution to higher priorities for residents, such as preserving the local high street, creating more public green spaces and gardens, or increasing broadband speeds. Building more homes should be 'anchored' to higher priorities that are credible strengths.

Figure 19: Party strengths on local priorities

Importance of local outcome (score) versus perceived marginal party strengths in delivering that outcome



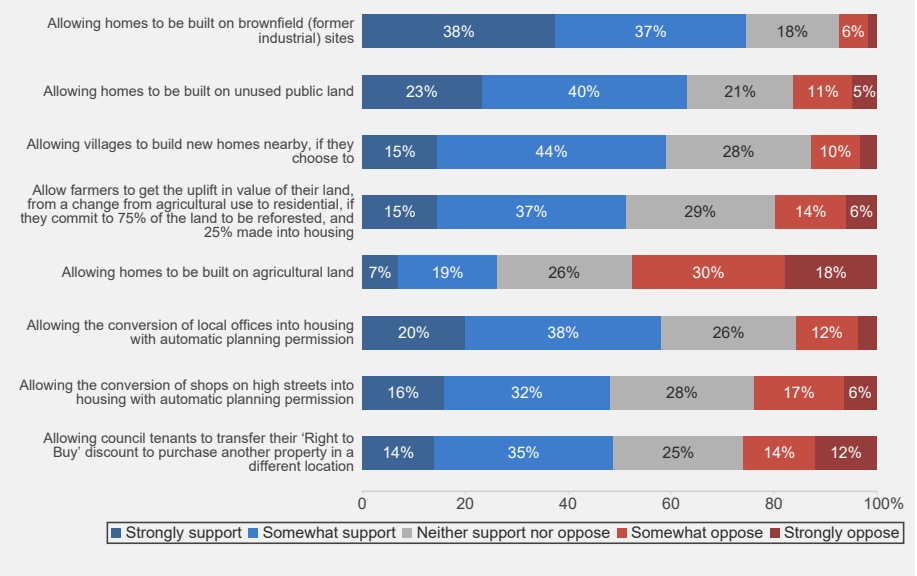
There are a wide array of popular initiatives and policies to expand homeownership. This ranges from building on brownfield (former industrial) sites (75%) and unused public land (63%) to allowing villages to build new homes nearby, if they choose to (59%).

There is also majority support (51%) for allowing farmers to get the uplift in value of their land, from a change from agricultural use to residential, if they commit to 75% of the land to be reforested, and 25% made into housing. This receives much stronger support than simply allowing building on agricultural land (26%).

A clear majority of Brits back the automatic granting of permission for the conversion of offices into homes (58%) and half of Brits support converting high street shops into homes (48%) or allowing council tenants to transfer their 'Right to Buy' discount to purchase another property in a different location (49%).

FIGURE 20: SUPPORT FOR VARIOUS PLANNING INITIATIVES

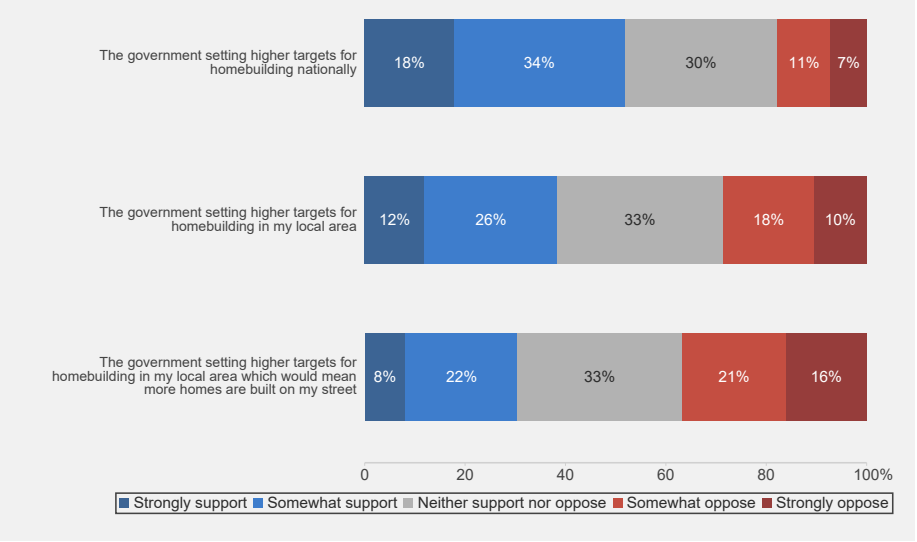
Do you support, or oppose, the following initiatives?



Emblematic of the problem, the results of this poll shows that there is majority support for establishing national housebuilding targets (52%), but as the specificity of the area becomes more localised, support declines. When we specify a homebuilding target in a respondent's local area support drops 14 points (38%) and declines another 8 points when a homebuilding target is specified to their street (30%).

Figure 21: Support for homebuilding targets nationally, in my local area, on my street

Do you support, or oppose, the following initiatives?



Planning for the future White Paper proposals

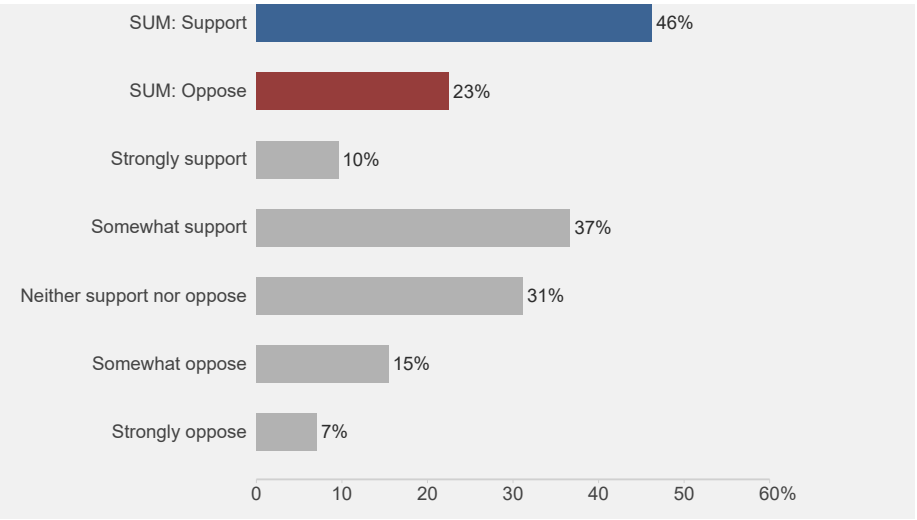
There is strong support for a zoning system (60%) consistent with the Government's proposals in the Planning for the Future white paper. There is also a majority (52%) support for the Government's proposal for an 'Infrastructure Levy' on new developments to invest in local infrastructure, including affordable housing, replacing the need for the developer to provide affordable housing. Residents also back the reduction of housing red tape if it makes it easier for smaller and medium-sized builders to operate (58%).

Street votes

There are twice as many people in support of street votes (48%) compared to those who oppose (22%) with a large number who neither support nor oppose the proposal (31%). The strongest support for the proposal came from London (56%), Yorkshire and the Humber (52%), the South East (51%), and South West (52%).

Figure 22: Support for street votes

Do you support, or oppose, allowing residents to set design rules for their street, allowing specific extensions, such as an additional floor or rear extension, for all properties on their street if a majority of residents agree? (VALID)

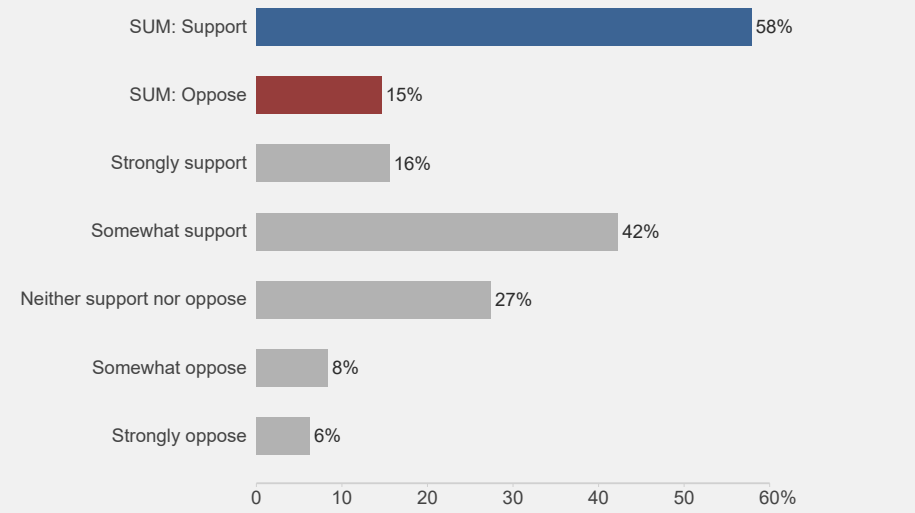


Mansards

There is strong majority support (58%) for granting permission for all properties to build mansard roof extensions as a way to create an additional floor on existing properties. Very few (14%) oppose the proposal while less than one-third (27%) neither support nor oppose.

Figure 23: Support for mansard roof extensions

Would you support, or oppose, granting permission for all properties to build mansard roof extensions as a way to create an additional floor on existing properties? (see images above) Note: only if it is considered safe to do so (VALID)



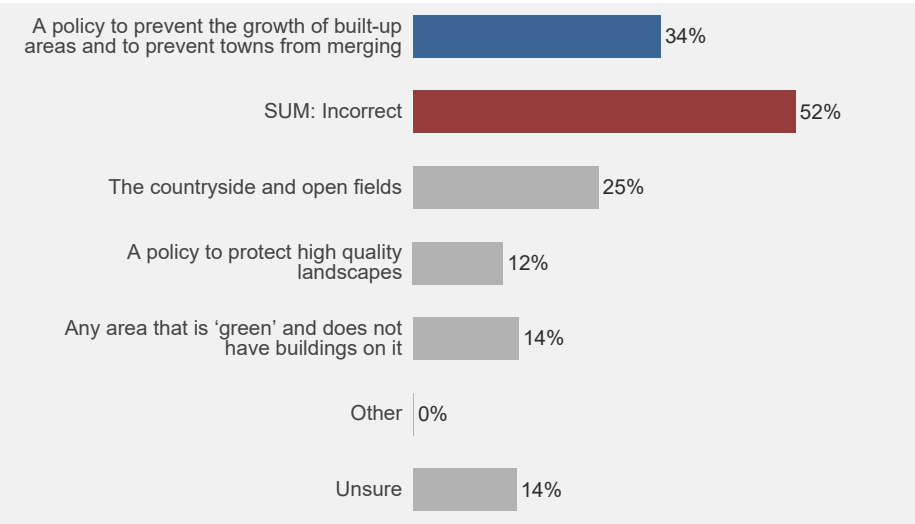
Green Belt

There is the least support for building on the 'Green Belt' with just one-fifth supporting it (20%) and less than one-third (29%) supporting it if the homes were within walking distance of stations.

However, a clear majority of voters have an incorrect understanding of what the Green Belt is (52%) or they cannot say (14%).

Figure 24: Understanding of what the Green Belt is

Which of the following statements is closest to your view about what the 'Green Belt' is?



Views on design are divergent

Respondents were also asked for their preferences with respect to building design. They did this by comparing traditional and modern architecture. The responses to these questions reflect a divided public. In respect to the first design question, the more modern architecture (44%) had a slight advantage over the traditional architecture (41%). The second question found an even match among respondents between modern and traditional (41%). The final question found a preference for the more traditional architecture (52%) over the modern architecture (39%).

Figure 25: Preferred housing designs

Imagine that the following two properties have exactly the same specification, the same living space, facilities and interior design. If you had to choose, which would you prefer to be built in your area? Option A, or option B? A) B)

Option A	Option B
Design Question 1	
	
44%	**41%**
Design Question 2	
	
41%	**41%**
Design Question 3	
	
39%	**52%**

There were significant differences with respect to design preferences. People who oppose building, are older, and own their own homes are more likely to support traditional designs. Meanwhile, younger cohorts are substantially more likely to prefer modern architecture. For example, in respect to the first design comparison, three-quarters (61%) of 18-to-34 year olds preferred the more modern design Option A compared to just one third (34%) of 45-to-54 year olds, one-quarter (24%) of 55-to-64 year olds and less than half (46%) of those aged over 65.

In respect to the third design question, around two-thirds of 18-to-24 year olds (66%) and half of 25-to-34 year olds (50%) said that they preferred the more modern design Option A, compared with just one-quarter (25%) of those aged over 65.

These divergent views highlight challenges faced by builders and architects to find designs that attract popular support. It seems that some modern architectural styles, though not all, can be preferred over more traditional designs.

While to some extent this may appear to be an intractable issue — each development can only be of one style — so it does highlight the need to incorporate local preferences as much as possible with respect to design.

It is also worth highlighting the earlier finding that while many consider design to be important, it is not a significant driver of whether people are more willing to support homebuilding overall, at least compared to other priorities and outcomes.

We have segmented the population by their propensity to support higher building targets nationally combined with their willingness to support more building in their local community. This analysis reveals not only the propensity to support more development, but also the driving factors behind support and opposition to reform.

Yimbys (36%) or 'Yes in My Back Yard' support more housebuilding nationally and locally.[18] **Blockers** (18%) oppose more housebuilding nationally and locally. **Nimbys** (13%) or 'Not in My Backyard' support more house building nationally but oppose more development locally. **Opportunists** (2%) do not support more national housebuilding but do want more in their local area. There are also a number of **Passives** (31%) who do not have a strong opinion on homebuilding. This distinction provides a useful schema to analyse attitudes to homebuilding.

Yimbys are likely to be younger couples and families, living in rentals with friends or roommates in flats and move homes more frequently. They are more likely to be private renters or council tenants but would like to own their own home. They think things in their area are getting better but also tend to be more likely to live in places where people stay a short time and move on. Politically, Yimbys can be found across all parties but are slightly more likely to be Labour voters (38%) compared to Tories (31%) and disproportionately live in Red Wall seats.[19] When it comes to building, Yimbys believe that more homes would have a positive effect on their area and they are less likely to have objected to building in their area. They want homeownership to be more affordable, even if that means overwriting the priorities of locals, and care less for protecting the 'Green Belt'. Homebuilding is electorally resonant: Yimbys are the most likely cohort to flip their vote to support a party that would build more homes.

Blockers are the diametric opposite of Yimbys. They feel housebuilding makes their areas worse, want less housing, higher prices and fewer people in their community. They tend to be older homeowners and single-occupiers or empty nesters and are more likely to be women. They live in houses, not apartments, and have lived in the same place for longer periods of time. They are most loyal to those they know and who are already in their community. They are more likely to think things have gotten worse or stayed the same in recent years, indicating negative previous experiences with development. They strongly oppose local priorities being overwritten to build more homes and strongly support "protecting" the "Green Belt".

Nimbys share some characteristics of Blockers and others of Yimbys. They share a similar likelihood of homeownership with Blockers and are more likely to live in places where people settle for a long time. With respect to age they sit between the older Blockers and younger Yimbys. They are most likely to know the real purpose of the Green Belt, that is, to prevent built-up areas from merging. Their very strong

18 Among likely voters it raises to Yimby (39%), Nimby (15%), Blockers (19%), Passives and Opportunities (28%)

19 Red Wall likely voters: Blockers (15%), Nimbys (11%), Yimbys (45%) and Passives & Opportunists (29%)

default view is that more housing in the area has a negative effect on the local community and a tad more likely than average to have opposed a housing development. They want the preferences of local residents to be respected and want the value of their home to keep increasing even if it means less housing affordability. But unlike Blockers, they are persuadable to more building, particularly if they feel there is local benefit, investment in local health and education, it is in-keeping with the look of the area and it boosts the local economy. Nimbys worry about development going wrong in their area, but do not oppose all new housing.

Passives represent the centerpoint of many characteristics. They have average levels of homeownership, though among Passives who do not own a home, they are much less likely to aspire to homeownership and are more likely to live in a bedsit or flat let. They do not believe more building will have much effect on their communities, believe their areas are largely unchanged in recent years and that they live in average rather than desirable areas. They tend to express similar levels of NET support to Nimbys for many initiatives — along with high levels of uncertainty or neither agree nor disagree, indicating they lack strong opinions. They are less likely to have engaged in the planning system or vote at an election. They are much more likely to believe that owning a home has no significant impact on your wealth.

All groups are found in similar numbers across the country, with the exception of Blockers who are less common in London and Yimbys who are more common.

Figure 26a: Segmentation of residents matrix

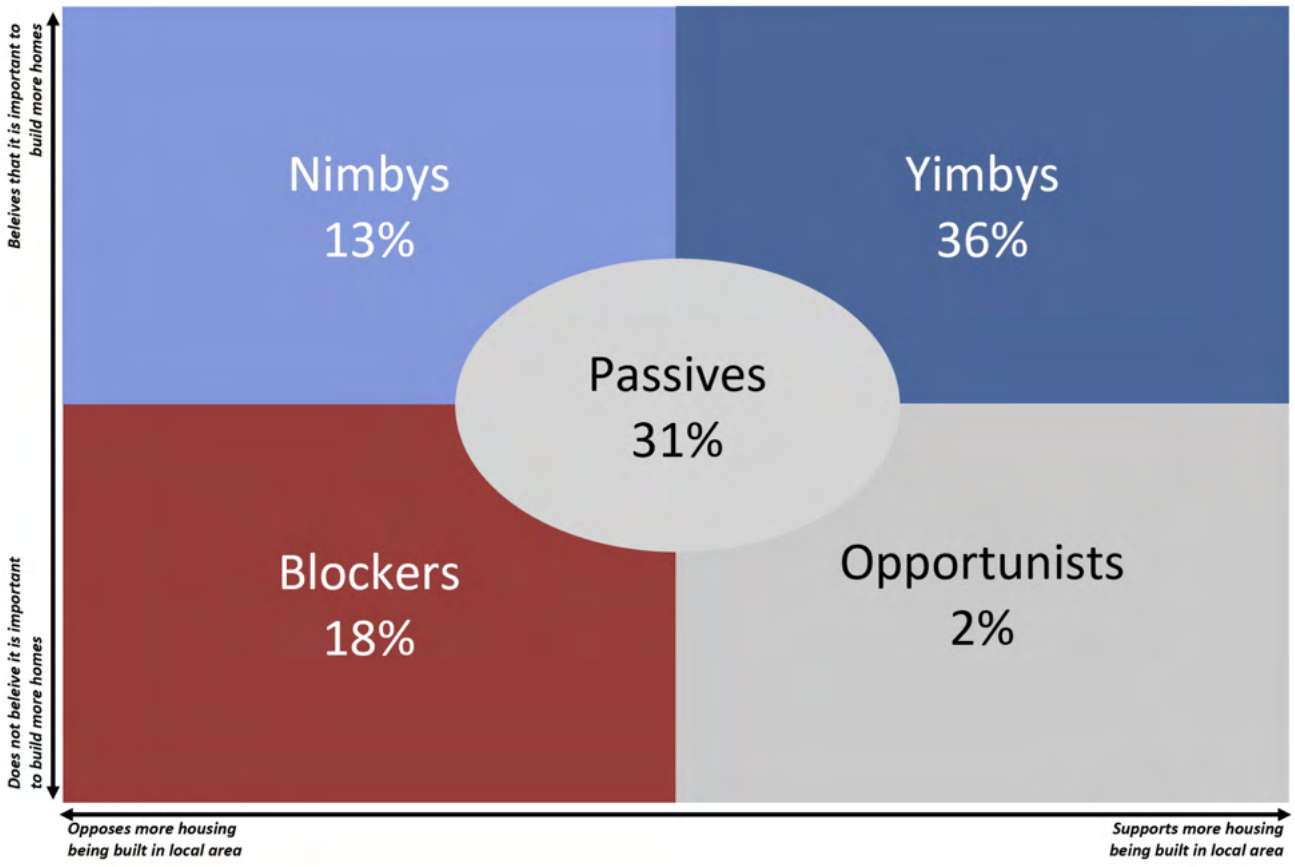
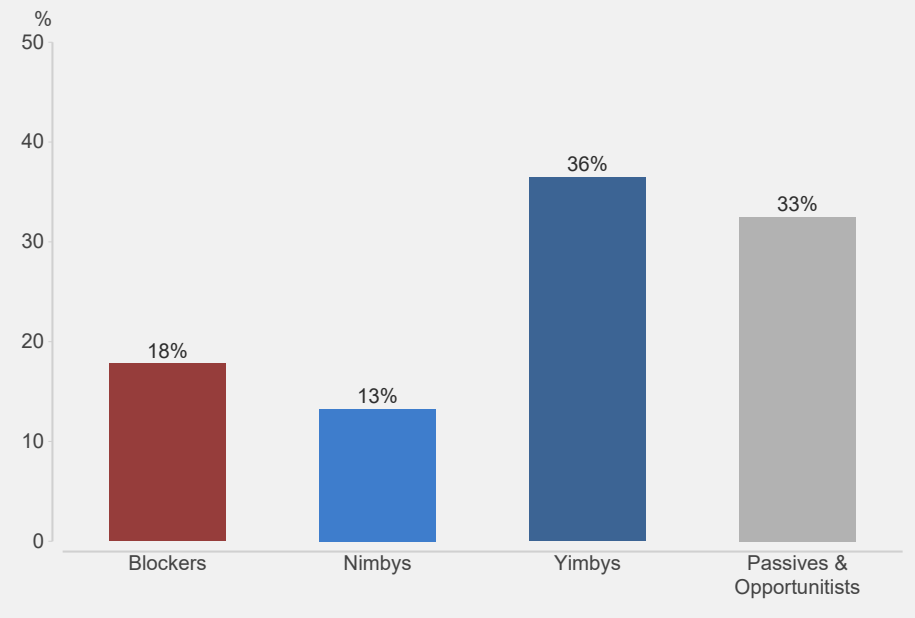


Figure 26b: Segmentation of residents (% population)

Blockers, Nimbys, Yimbys, Opportunists and Passives



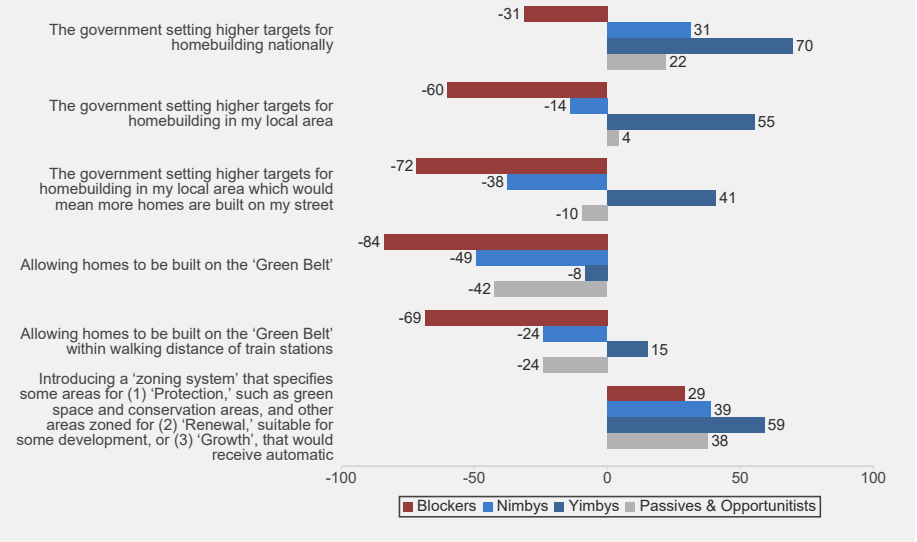
How the different groups respond to initiatives

In respect to specific initiatives, Yimbys tend to support the most of the proposals put to them, and Blockers tend to oppose most. However, Nimbys and Opportunists/Passives are somewhere in between, and support them depending on the specific initiative. Blockers strongly oppose targets nationally (-31%), locally (-60%) and on their streets (-84%). Yimbys are very supportive of higher targets, be it nationally (+70%), locally (+55%) or on their street (+41%). Nimbys are open to national targets (+31%) but oppose ones in their local area (-14%) and on their street (-38%).

All groups are against building on the 'Green Belt', though Yimbys to a lesser extent. While there is net support among all groups for a 'Zoning system'.

Figure 27: NET support for homebuilding initiatives and building on the 'Green Belt'

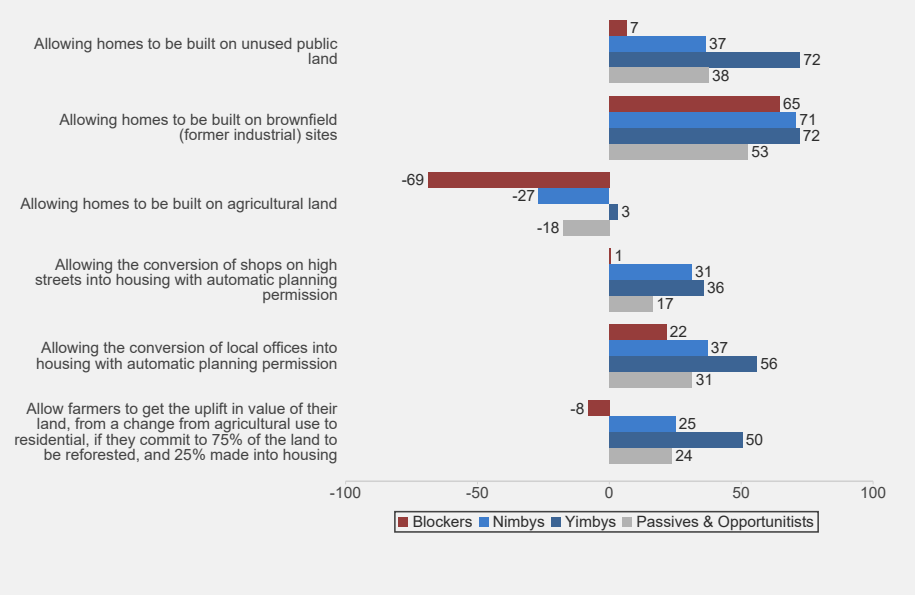
Do you support, or oppose the following initiatives? (NET)



There is strong support among all groups for building on brownfield sites, and net support among all groups for building on unused public land and converting shops and houses into housing. Allowing farms to be partly converted to housing is supported by all groups except Blockers (-8%). On the other hand, building on agricultural land is opposed by all groups, except for Yimbys narrowly (+3%).

Figure 28: NET support for homebuilding approvals, permissions and conversions

Do you support, or oppose the following initiatives? (NET)



Among all groups, there is support for allowing villages to build new homes nearby if they choose and reducing red tape to help smaller and medium sized builders except, in both cases, for Blockers (-2%). All groups like a land tax on sites that have already received permission, providing a royalty to nearby residents and an 'Infrastructure Levy' replacing affordable housing requirements. Only Yimbys liked the

idea of releasing green belt land after a vote of local residents, though Nimbys (-3%) are divided on the idea.

Figure 29: NET support for homebuilding strategies, regulation, levies and taxes

Do you support, or oppose the following initiatives? (NET)

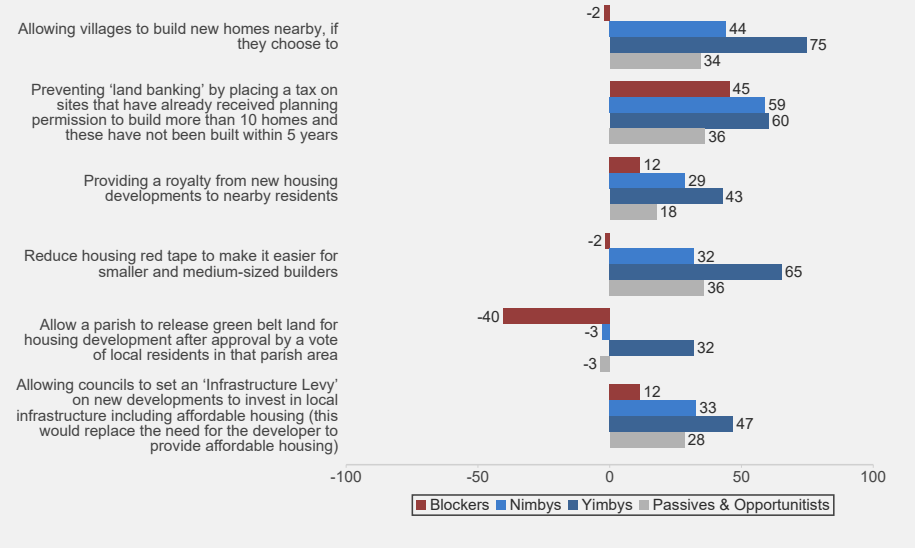


Figure 30 (below) shows support for local homebuilding contingent on several criteria. It is important to note that there is NET support for building more homes, among all groups, if residents feel that it would lead to more investment in services within the community, and feel it helped the local economy by creating more jobs and increasing wages.

There is NET support for homebuilding among Nimbys, Yimbys and Opportunists/Passives if they believe that it will lead to more affordable housing for young people from the local area, and it lowered the costs of rents in the area.

Figure 30: NET support for building more homes in the local community based on conditions - Economic, investment and financial outcomes

Would you be more likely to support, or oppose, housing being built in your local area if…

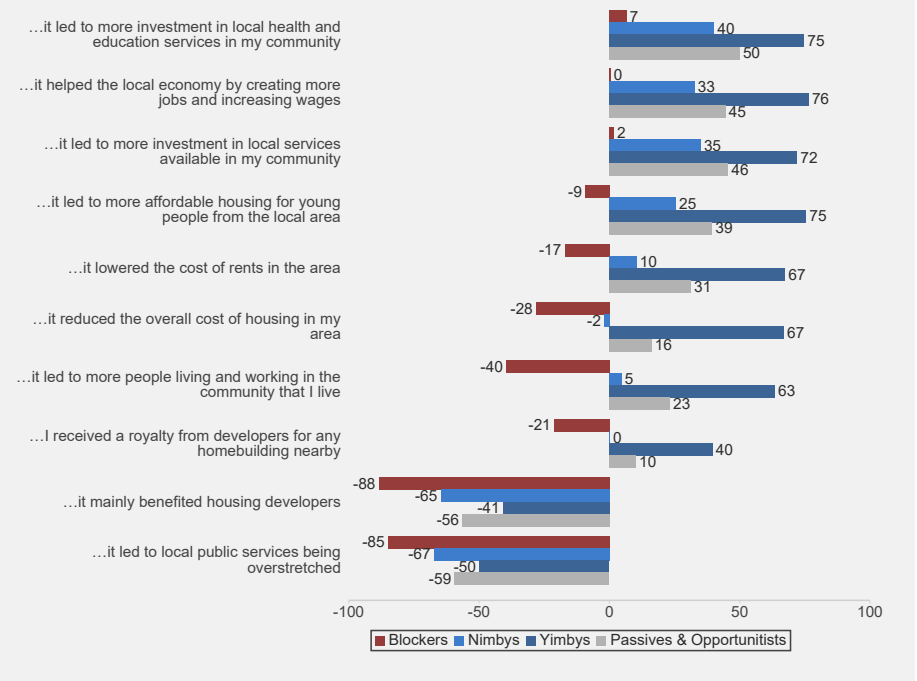
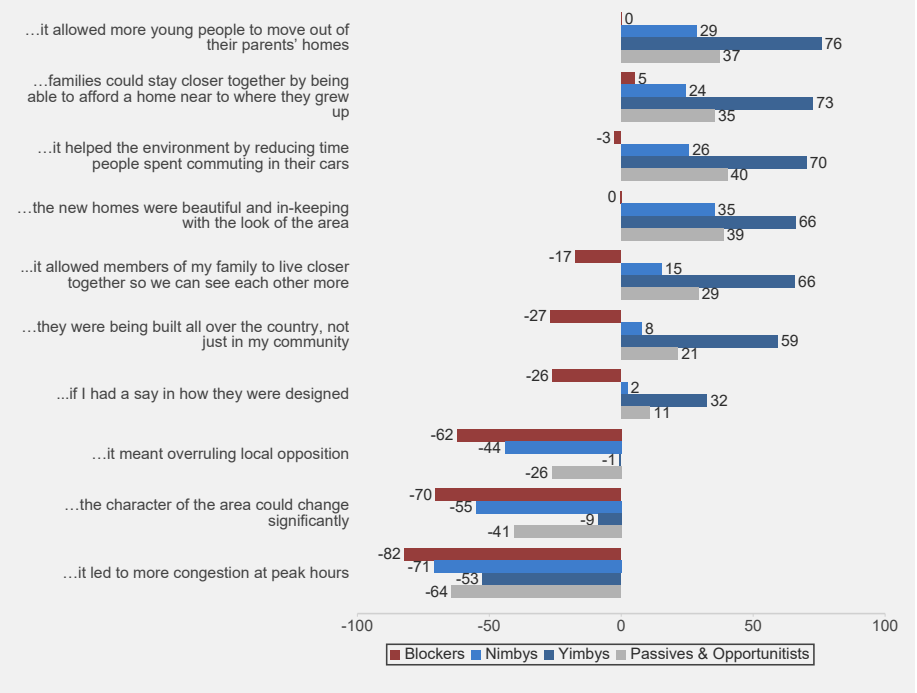


Figure 31 (below) shows that there is a strong family-orientated component that is driving support for more homebuilding. There is NET support for more homebuilding if it allows more young people to move out of their parents home, and if it allows families to stay closer together and near to where they grew up.

Most of the initiatives tested among residents, achieved high levels of NET support among Yimbys, Nimbys and Opportunists/Passives, which represent a combined population share of 82%. These results suggest that there is plenty of scope to build a supermajority of residents and voters who will support further development in their local community.

Figure 31: NET support for building more homes in the local community based on conditions - Local environment, character and community outcomes

Would you be more likely to support, or oppose, housing being built in your local area if…



Housing policy has plagued British politics for far too long: perhaps for understandable reasons. Where and how we live defines our quality of life, relationships, job opportunities, incomes, inequality, environmental footprint and much more.

For many young people, while they are locked out of homeownership, rent accounts for a large share of their income and drives long-standing political frustrations.

For homeowners the incentives work the other way around. Homebuilding is seen as a risk that they want to control. A risk to the value of their largest asset, a risk that the character of their area may change, a risk that it will affect their quality of life. A risk that they may not have a meaningful say with housebuilding that might deliver nothing for them personally. What's in it for them?

More Brits support increasing homebuilding than oppose, but a majority are also owner occupiers. This is leading to stasis. It is a situation that has tended to be portrayed as an irreconcilable political issue, with several efforts to establish reform having failed in the past.[20] The assumption has been that no matter what a government does on the issue it can only lose.

This report demonstrates that assumption is false. Not only can building more homes be considered popular among residents, homeowners and renters, but we have shown that it is possible for planning reform to deliver a meaningful electoral benefit for political parties willing to commit to a truly transformative agenda.

The research has also shown that this can only be achieved by empowering communities and delivering tangible improvements. By establishing and communicating the clear incentives for those who already own a home, to support and champion the building of more in their area, potential can be unleashed where it is needed most. Through carrots, not sticks. Community consent, not top-down dictat. Highlighting the possibility to transform and grow communities with successful homebuilding.

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20 https://www.adamsmith.org/research/home-improvement