

# The Future of Home



**VELUX®**



## Background & Objectives

This reports details findings from a multimarket quantitative study with homeowners and renters exploring the emerging 'living' trends and the impact these might have on their future home needs.

### Topics

- Home Improvements
- Housing Affordability / Rental Constraints
- Indoor Climate, Adapting to Extreme Weather & Daylight
- Ventilation & Air Quality

# Methodology

In December 2025, we conducted an online survey with 9000 homeowners and renters. This was a representative sample amongst individuals aged 18-80

The markets included were :

- ▶ **UK**
- ▶ **Sweden**
- ▶ **Germany**
- ▶ **Switzerland**
- ▶ **Austria**
- ▶ **Denmark**



# Executive Summary

## Why Move When You Can Fix?

Moving decisions are increasingly being driven by practical pressures of space constraints, noise and affordability, rather than aspiration. Younger people and renters are the most able to move, often responding to life-stage changes or rising costs. But despite strong intent to move, many delay action; high property prices, renovation costs and financing constraints limit both mobility and home improvement, particularly for renters and families. Affordability pressures also affect wellbeing, reinforcing feelings of stagnation and lack of control over living conditions.

### Implications:

→ **Renovation can be a smart alternative to relocation**; bringing daylight, ventilation and acoustic comfort as solutions to the very problems that trigger moving.

## Comfort is not a Luxury – it's Fundamental

Poor temperature regulation has a direct impact on wellbeing, productivity and satisfaction, particularly in colder climates and older homes. Younger residents and those in shared or older properties are less satisfied with air quality & ventilation, reinforcing inequalities in indoor comfort across age and housing type. Extreme heat increasingly disrupts daily life, sleep and comfort, yet **most people respond by changing behaviour rather than upgrading their homes**, relying on short-term coping strategies instead of structural solutions.

### Implications:

→ There is an opportunity to rethink healthy indoor climate design by bringing together daylight, ventilation and thermal comfort at the centre of conversations about wellbeing.

**Embracing the shift from reactive coping to proactive adaptation**, emphasising passive cooling, shading and ventilation highlights more practical solutions for climate-resilient homes.

## Renovation remains the New Relocation

Renovation has overtaken moving as the dominant way people adapt their homes, with nearly half renovating in the past 5 years. Activity is driven by aesthetics, functionality and energy efficiency. Yet a disconnect remains; while space needs are a key concern, they do not consistently translate into renovation action. Cost, time and lack of know-how remain the biggest blockers to renovating.

### Implications:

→ **Renovation can be simplified** by accessible daylight and ventilation upgrades, focussing on high-impact changes rather than complex structural projects. Education and inspiration remain critical in converting intent into action.

## Everyone cares about Energy – Few Act on It

Energy efficiency dissatisfaction is widespread but rarely triggers decisive action. Renovations are largely motivated by saving money, with comfort and health secondary benefits. Younger homeowners do express ambition to improve efficiency but lack clarity on where to start, reinforcing the gap between concern and real behaviour.

### Implications:

→ Daylight and ventilation are passive energy solutions that directly contribute to lower bills, reduced overheating, and year-round comfort. **Making those solutions more tangible and practical** opens opportunities for proactive action.





## Space, Quiet and Control on Aesthetics Define a Happy Home

Home satisfaction is dependent on space adequacy, noise levels and aesthetics. Renters and urban residents are far more likely to be dissatisfied by noise, while remote workers feel the strain of limited space. Newer homes and homeowners report higher satisfaction, highlighting the importance of adaptability and control. While most say they are satisfied with air quality, behaviour suggests otherwise, with many reducing ventilation in winter to save energy despite concerns about sleep, health and damp; energy anxiety is undermining healthy ventilation habits.

### Implications:

→ **Relevance is strengthened by focusing on everyday liveability:** light and design that enhance comfort, and energy-efficient ventilation that protects health without adding cost.

## Daylight is Valued – But Still Underrated

Natural daylight is widely recognised as beneficial, yet it rarely drives major housing decisions. Younger people and home workers feel its absence most acutely, but daylight is still treated as an enhancement rather than an essential feature. This highlights a persistent gap between awareness and prioritisation.

### Implications:

→ **Daylight is part of the home wellbeing infrastructure,** with a direct role in mental health, productivity, and perceived space—making light a necessity, not a luxury.

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# Home Improvement

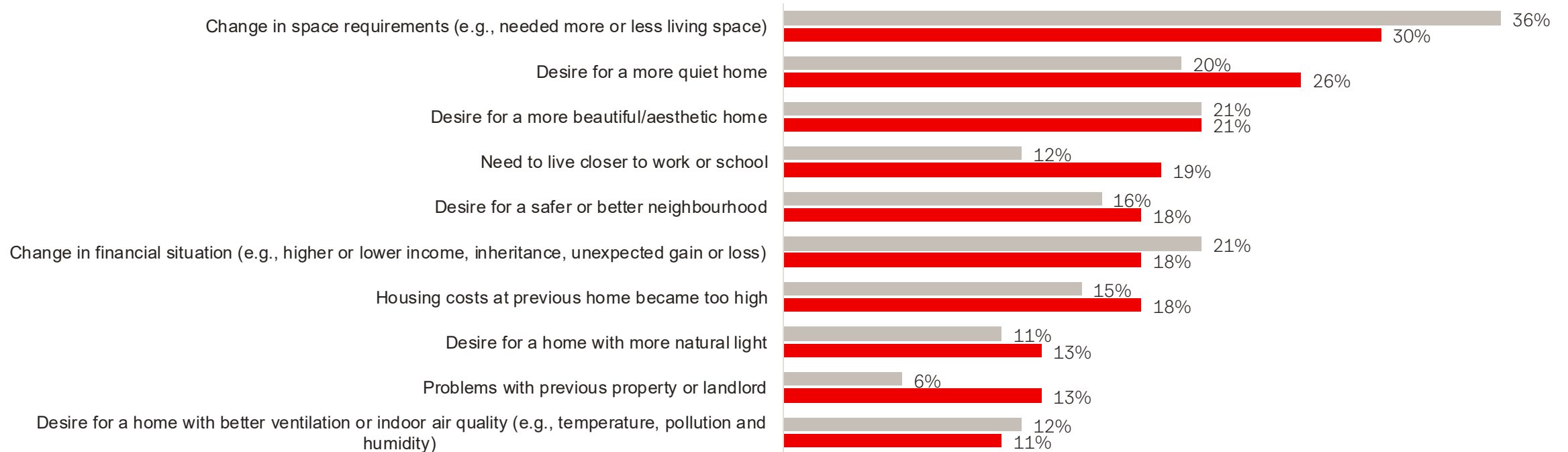


# Changes in space requirements and a desire for a quieter home drive moving decisions

Changes in space requirements drives both past and future moving decisions

Factors motivating respondents to move home

■ Considering moving home ■ Already moved home



Q8. What factors most influenced your choice to move the past 5 years?  
 Q12. What are the key reasons for you considering moving to a new home?



### 35% of respondents have moved home in the past 5 years.

- Younger generations are significantly more likely to have moved in the past 5 years; 59% of 18–29-year-olds and 57% of 30–39-year-olds have done so, compared to just 35% of 40–49-year-olds and 24% of 50–59-year-olds.
- 42% of couples with children living at home state they have moved home in the past due to a change in space requirements; significantly more than couples with no children, living alone, with parents or with friends.
- Homeowners are more likely to have moved due to a desire for a quieter home (31%) compared to 23% of renters. Individuals living in the countryside are also more likely to have moved due to a desire for quieter surroundings (36%) compared to 22% of those in a major city.
- A desire for a more beautiful/aesthetic home also drove more homeowners to move (27%) than renters (17%). Additionally, individuals whose home was built between 2000–2025 are considerably more likely to have moved for aesthetic reasons (27%).
- Reasons for moving in the past 5 years also vary by age, with 27% of 18–29-year-olds and 20% of 30–39-year-olds moving to live closer to work or school, significantly more than other age groups.
- Financial factors were also a key reason for those who have moved house, with both rising housing costs and a change in financial situation driving 18% of respondents respectively to move. With renters more likely to have moved due to rising housing costs (21%) compared to 14% of homeowners.
- 15% of renters have moved in the past due to problems with their previous property or landlord.

### 28% of respondents are considering moving home in the next 5 years.

- Younger generations are significantly more likely to be considering moving in the future; 44% of 18–29-year-olds are considering a move.
- Couples with children living at home are the most likely to be considering a move (40%).
- Renters are also significantly more likely to state they will consider moving home in the next 5 years (38%) compared to 19% of homeowners.
- Older respondents are more likely to be considering moving home in the future due to a change in space requirements (41%) of 60–69-year-olds.
- Individuals who live with a friend or friends are more likely to state they are considering moving in the future due to a desire for a more aesthetically pleasing home (33%).
- Those who are living in a one-adult household with children living at home are the most likely to be considering moving in the next five years due to a change in their financial situation (29%).
- German respondents are the most likely to state that a desire for a quieter home is an influential factor in moving house in the future (26%). Additionally, individuals who live in a major city are also more likely to be contemplating moving home due to a desire for their future home to be quieter (23%).
- Respondents in Germany (21%) and the UK (20%) are the most likely to be considering moving house in the future due to a desire to live in a safer/ better neighbourhood.

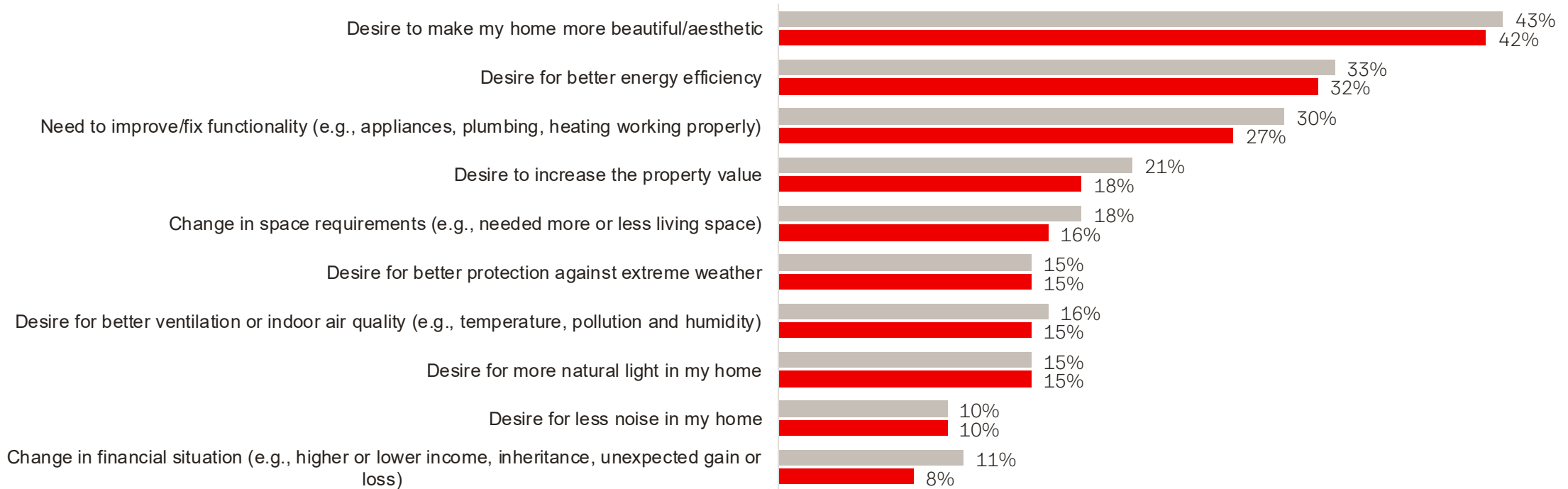
Q8. What factors most influenced your choice to move the past 5 years?  
 Q12. What are the key reasons for you considering moving to a new home?

# Respondents prioritise personalisation and energy efficiency, with a third considering renovations to enhance energy efficiency

Aesthetics desires drive both past and future renovations

Factors motivating respondents to renovate their home

■ Considering renovating ■ Already renovated



Q10. What were the key reasons for these renovation projects?

Q14. You stated that you are considering renovating your existing home within the next 5 years. What are the key reasons for you?



**49% of respondents have renovated their home in the past 5 years.**

- Individuals who own (62%) their property are significantly more likely to have renovated their home in the past compared to (34%) of renters.
- Women are significantly more likely to state that a desire to make their home more aesthetic motivated them to renovate their home (46%) compared to (37%) of men. Renters are also more likely to have renovated their home for aesthetic reasons (45%) compared to those who own their property (40%).
- Individuals in the UK are the most likely (36%) to have renovated their home in the past to improve its energy efficiency, compared to just (26%) of those from Sweden.
- Individuals who work from home 5 times or more a week are more likely to state they have renovated their home to improve/fix functionality (30%).
- 28% of individuals who have added an extension have done so to increase their properties value. Couples with children living at home are also more likely to have renovated for this reason (24%).
- 45% of individuals who have converted an unused loft or attic into liveable space have done so due to a change in space requirements. Additionally, couples with children living at home are the most likely household to have renovated in the past 5 years due to a change in space requirements (22%) compared to just (10%) of couples.

**30% of respondents are considering renovating their home in the next 5 years.**

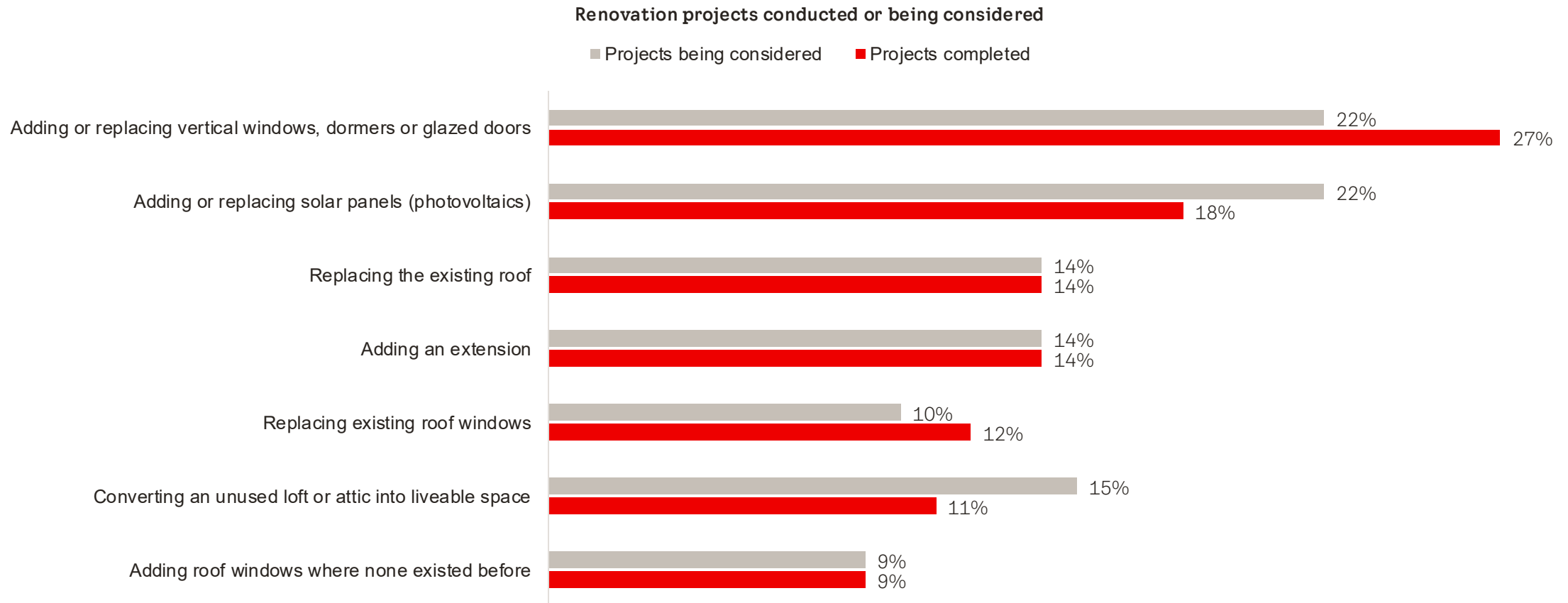
- Individuals living in a major city are the most likely to be considering future renovations to enhance the aesthetics of their home (48%) compared to (37%) of those who live in the countryside.
- Just over half (52%) of German respondents also state that a desire to make their home more aesthetic is a motivating factor in potential future renovations. Individuals in Switzerland are the least motivated by aesthetic desires (33%).
- A third (33%) of global respondents are considering renovating their home to enhance its energy efficiency, with Austrians the most environmentally conscious (36%).
- 38% of individuals whose property was built between before 1910 are considering future renovation projects due to a need to improve/fix functionality.
- 32% of homeowners are considering renovating their home in the future to increase the value of their property.
- 22% of households which comprise of couples, with children living at home are contemplating renovations in the next 5 years due to a change in space requirements.
- 42% of individuals who are considering converting an unused loft or attic into liveable space and 41% who are contemplating adding an extension in the next 5 years are doing so due to a change in space requirements.

Q10. What were the key reasons for these renovation projects?

Q14. You stated that you are considering renovating your existing home within the next 5 years. What are the key reasons for you?

# Window improvements drive renovation projects, with younger generations the most engaged

## Window changes and additions drive renovation projects



Q9b. Have you completed any of the following renovation projects in the last 5 years?  
Q11b. Are you considering any of the following renovation projects in the next 5 years?

## Home Improvement - Expansion Renovations

### 27% of respondents have added or replaced vertical windows, dormers or glazed doors in the past 5 years

- Younger generations are the most likely to have added or replaced vertical windows, dormers or glazed doors in the past 5 years with both 31% of 18-29-year-olds and 30-39-year-olds stating this.
- Individuals living in the UK are also the most likely to have added or replaced vertical windows, dormers or glazed doors in the past 5 years with (35%) having done so.
- Sustainability is also a key motivator to renovate homes, with (26%) of Austrians having added or replaced solar panels (photovoltaics) in the past 5 years. Additionally, individuals aged 18-29 years are the most likely to have completed this renovation project in the past 5 years (23%).
- Individuals with more modern properties built between 2000-2025 are considerably more likely to have added or replaced solar panels (photovoltaics) in the past (27%). They are also more likely to have added roof windows where none existed before (14%).
- Younger respondents are more likely to state they have added an extension in the past 5 years. A quarter of respondents aged 18-29 years-olds and 20% of 30-39-year-olds have stated this.
- 19% of individuals who live in homes built between 1930-1949 are more likely to state they have replaced the existing roof of their property in the last 5 years.

### Adding or replacing windows, dormers, glazed doors and solar panels drive future renovation plans

- 22% of respondents are contemplating adding or replacing vertical windows, dormers or glazed doors in the next 5 years, Natural daylight is important particularly to younger generations (18-29-year-olds) who are more likely to be considering this renovation project (27%).
- Individuals aged 30-39 years old are the most sustainability conscious, with 30% considering adding or replacing solar panels (photovoltaics) in the next 5 years compared to 22% of all respondents. Individuals living in Switzerland are the most likely to be considering this (30%).
- Property expansion is a key consideration for many, individuals who live with a friend or friends are more likely to be considering converting an unused loft or attic into liveable space within the next 5 years (26%). Those who work from home 3-4 days a week are also more likely to be considering this renovation (21%).
- A quarter (25%) of 18-29-year-olds are thinking about extending their home in the next 5 years. Individuals living in the UK are also more likely to be contemplating this future renovation (24%).
- 17% of homeowners are considering replacing the existing roof of their property in the next 5 years.
- 12% of respondents believe that adding roof windows increases the value of a property. This rises to 23% of those who have 4-6 slopped roof windows.

Q9b. Have you completed any of the following renovation projects in the last 5 years?  
Q11b. Are you considering any of the following renovation projects in the next 5 years?

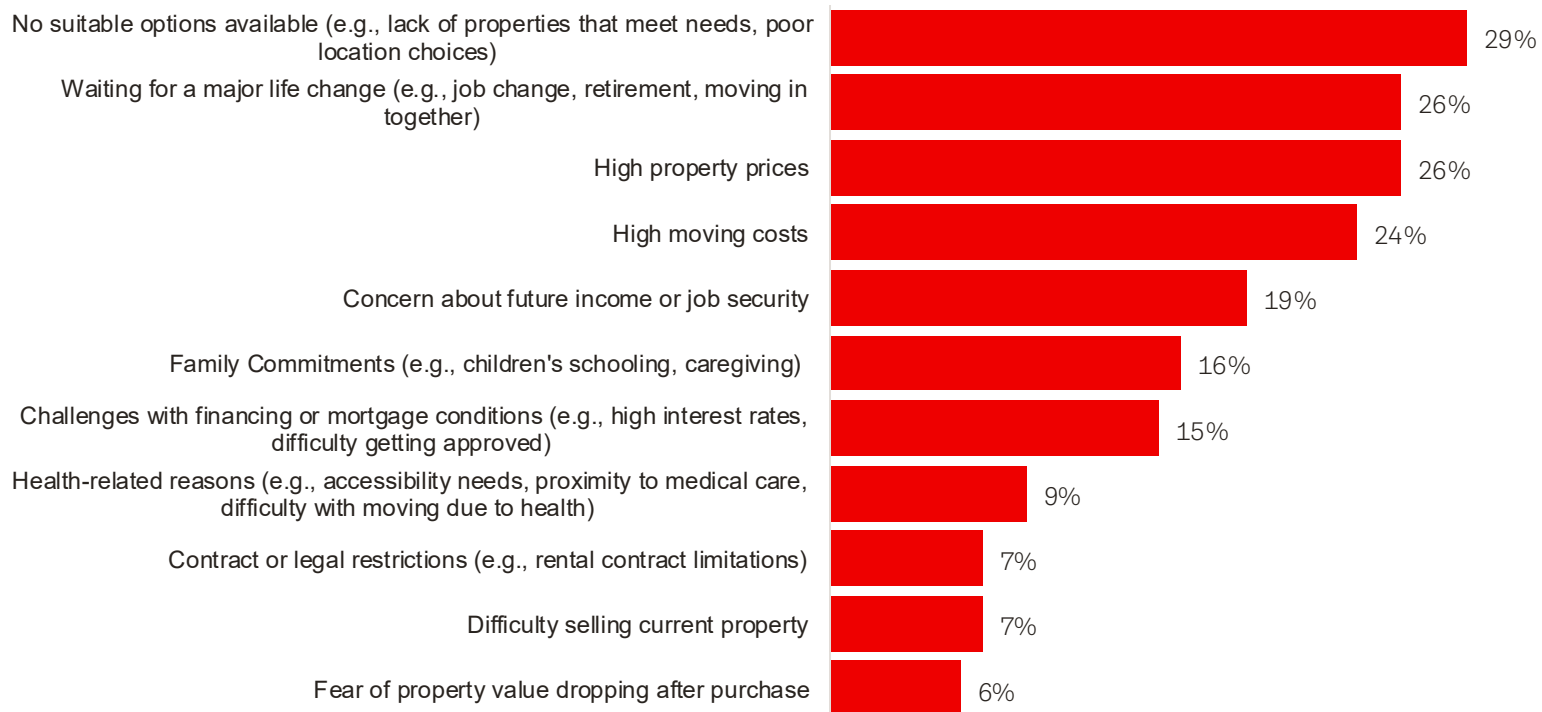


# A lack of suitable properties and high moving/renovation costs prevent respondents from moving and renovating

Barriers to moving are a lack of suitable properties as well as financial cost involved

Reasons preventing property moves

■ Moving Barriers



Over a quarter of respondents are waiting for a big life change before moving home

- Older generations (60-69 years old) are the most likely to not have moved home yet, despite considering it due to believing there are no suitable options available (37%).
- 36% of respondents who live at home with their parents have not move home yet as they are waiting for a major life change.
- 27% of Renters feel that they are prevented from moving due to high moving cost compared to (18%) of homeowners.
- Concern about future income or job security is preventing (23%) of Germans from moving home.
- Individuals in the UK (47%) and those with much older properties built before 1910 (47%) most keenly feel that high renovation costs are a barrier.
- 34% of couples with children living at home feel that a lack of time to manage a renovation, prevents them from completing any work (34%).
- Financial challenges is preventing 27% of 30-39-year-olds from renovating their home.
- One fifth (20%) of individuals living in a city state that a lack of knowledge and not knowing what to do/where to start is preventing them from renovating (20%).
- The type of renovation also impacts ability to start; individuals who are considering adding or replacing vertical windows, dormers or glazed doors in their future renovation projects are significantly more likely to have not started because of high renovation costs (45%).
- 22% of respondents in the UK state that difficulty finding reliable contractors or professionals is stopping them from completing any renovation work.

Q13. Are there specific reasons why you have not moved yet?  
 Q16. Are there any specific reasons why you have not already started renovating your home?



# Home Improvements - Moving and Renovating Barriers



**Renovation barriers** are the financial cost implications, and a perceived lack of time/knowledge



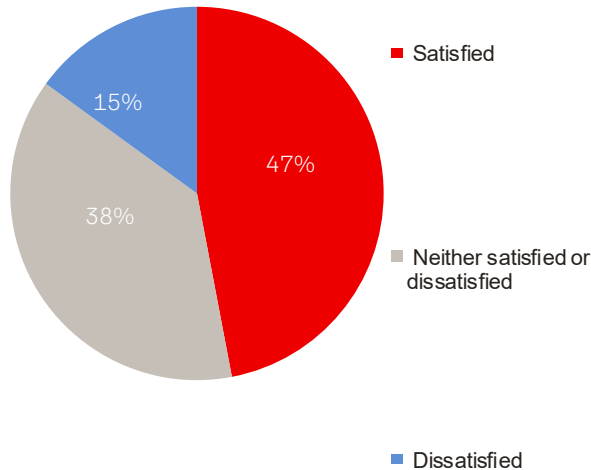
Q13. Are there specific reasons why you have not moved yet?  
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Home Improvement - Addressing Energy Efficiency

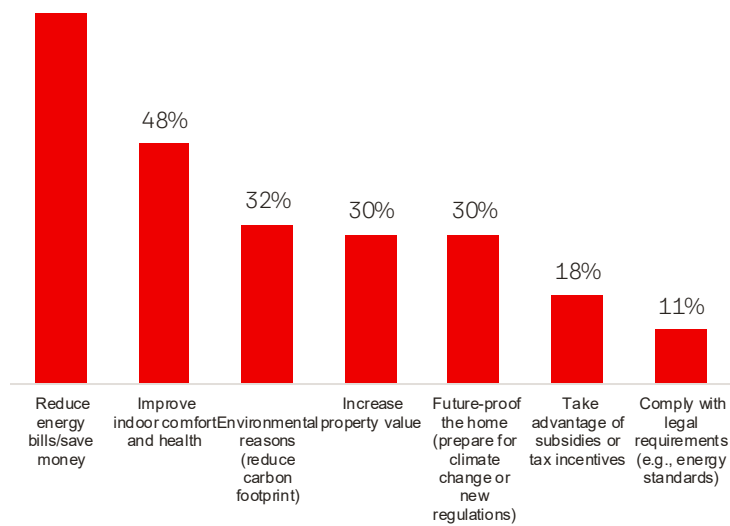
# Despite low energy efficiency satisfaction, few are motivated to move or renovate to address low efficiency

Less than half (47%) of respondents are satisfied about the energy efficiency of their current home

How satisfied respondents are about the energy efficiency of their current home



Key reasons respondents have or are considering renovating their home to improve energy efficiency



Q15. You mentioned previously that you have renovated or plan to renovate your home to improve energy efficiency. What are the key reasons for you?  
 Q17. How satisfied are you with the following aspects of your current home? (Energy Efficiency)  
 Q24. Please select all statements that you agree with.



## Home Improvement - Addressing Energy Efficiency

### 32% of individuals have renovated their property to improve the energy efficiency of their home

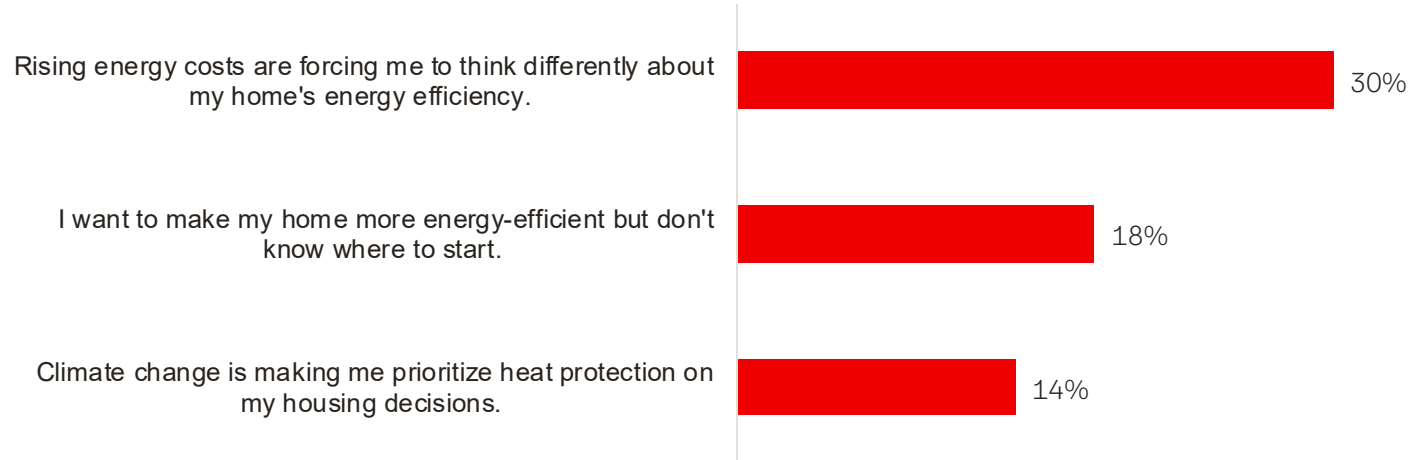
- Homeowners are significantly more likely to have renovated their home for energy efficiency reasons (37%) compared to just (22%) of renters.
- UK respondents are the most likely (36%) to have renovated their home in the past to improve its energy efficiency, compared to just (26%) of those from Sweden.
- Austrians are most likely to be considering future renovations to enhance the energy efficiency of their home (36%). 41% of countryside dwellers are also motivated by environmental reasons compared to (25%) of those in a major city.
- 19% of renters are dissatisfied with the energy efficiency of their home compared to (13%) of homeowners.
- 83% of those with properties built before 1910 have renovated or have planned renovations to improve energy efficiency are motivated to reduce energy bills/save money. Individuals living in these properties are also more likely to be dissatisfied with the energy efficiency of their home (27%).
- 60% of UK respondents and (54%) of Danish respondents have renovated or have plans to renovate for energy efficiency reasons to improve indoor comfort and health.
- 42% of 18-29-year-olds have renovated or planned to renovate to improve energy efficiency, are motivated by environmental reasons.
- 42% of Swedish respondents have renovated or have plans to renovate to improve energy efficiency, are motivated to increase the value of their property.

### Reductions in energy bills is the key driver of energy efficiency renovations

- Although dissatisfaction with home energy efficiency is relatively widespread, it appears to remain a latent concern rather than an active driver of behaviour change, with minimal impact on renovation uptake or moving intentions.
- Only 10% of global respondents have moved in the past due to a desire for a home with better energy efficiency. Just 13% are considering moving in the future for this reason, this rises to 20% of those who work from home 3-4 days per week.
- 43% of UK respondents feel that rising energy costs are forcing them to think differently about their home's energy efficiency.
- Younger respondents aged 18-29 years old (24%) wish to make their home more energy efficient but feel that they don't know where to start.
- Individuals who are considering adding roof windows where none existed before and those who are contemplating adding or replacing solar panels in future renovations are considerably more likely to say climate change is making them prioritise heat protection on their housing decisions (31%) and (30%) respectively.

# Despite low energy efficiency satisfaction, few are motivated to move or renovate to address low efficiency

Respondents opinions on climate change related statements



Q15. You mentioned previously that you have renovated or plan to renovate your home to improve energy efficiency. What are the key reasons for you?  
Q17. How satisfied are you with the following aspects of your current home? (Energy Efficiency)  
Q24. Please select all statements that you agree with.



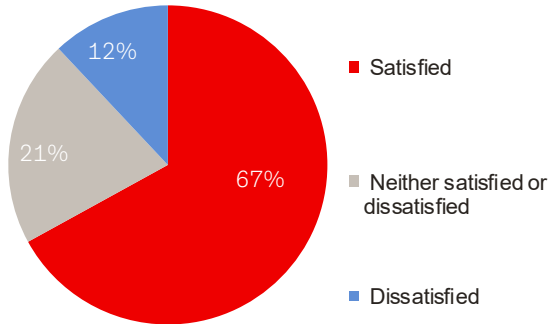
# Optimal living space and low noise levels are key to satisfactory living, while renters and city dwellers are more concerned by noise levels

**72%** of respondents are satisfied about their current home

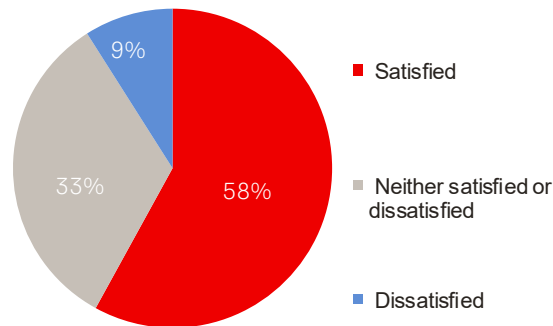
**67%** of respondents are satisfied about the amount of available space in their current home

**63%** of respondents are satisfied about the noise levels in their current home

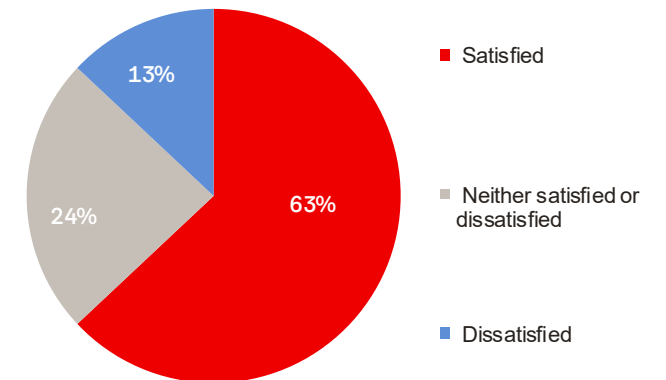
How satisfied respondents are about the amount of available space in their current home



How satisfied respondents are about the aesthetics of their current home



How satisfied respondents are about the noise levels inside or around the home



- Among those who have moved in the past 5 years, 30% cited their primary motivation to be a change in space requirements (e.g., needing either more or less living space)
- Change in space requirements is a factor for 36% of respondents considering moving home
- 18% of global respondents are considering renovating their home in the next 5 years due to a change in space requirements). UK respondents are the most likely to state this (28%).
- 67% of respondents are satisfied with the amount of available space, with Swiss respondents the most satisfied (72%).
- Those who do not work from home are significantly more likely to be satisfied with the amount of available space in their home: 71% say they are satisfied, compared to 62% of those who work from home 1-4 days a week.
- 58% of global respondents are satisfied with the aesthetics of their home, with homeowners who have more control over their aesthetic choices being more content (66%) compared to those who rent (50%).
- Additionally, individuals who live in newer houses (built between 2000-2025) are significantly more satisfied (70%) than those living in properties built between 1950-1969 (51%).
- 13% of respondents believe that adding roof windows makes a home more modern and fit for future living. This rises to 20% of those aged 18-29 years old. Homeowners are also more likely to feel this (15%) than renters (12%).

- 63% of global respondents are satisfied with the noise levels inside or around the home.
- However, renters are much more likely to be dissatisfied by noise levels (19%) compared to homeowners (9%).
- 76% of respondents who live in the countryside are satisfied with the noise levels inside or around the home, significantly more than respondents who live in a city, town or village.

Q17. How satisfied are you with the following aspects of your current home? (Amount of available space, aesthetics, noise levels)

# Housing Affordability



# Housing affordability impacts the moving decisions for many respondents and is a deterrent to being able to move for over a quarter

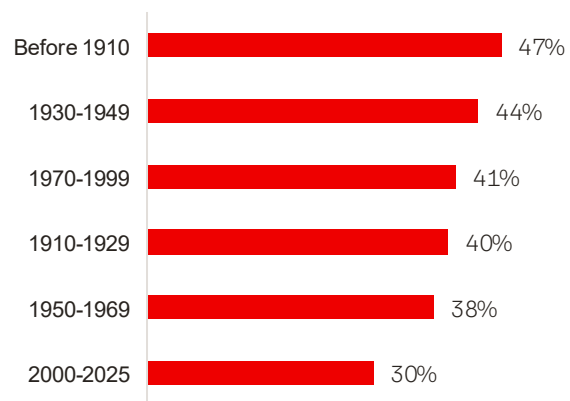
A quarter of global respondents feel deterred from moving home due to **high property prices**

- When it comes to not moving, a key reason for over a quarter of respondents (26%) is high property prices, felt most by those in the 40-49-year-old age group (31%). This also rises to 30% among those who are in a couple and have children living at home, significantly more than couples with no children or one-adult households with no children.
- Moving costs are a deterrent for 24%, globally, and for 27% in the 18-29-year-old age group. 32% of respondents in the UK also feel that moving costs are a barrier.
- Challenges with financing or mortgage conditions put 15% off moving, rising significantly to 21% among 30-39-year-olds.
- House renters are significantly more likely to find high property prices or high moving costs a deterrent to moving (30% respectively) compared to house owners (19% and 18%), suggesting affordability is more of a barrier to moving for renters than to homeowners.

**Affordability** is not just a barrier to moving home, it also impacts ability to renovate existing homes

- 39% of respondents cite high renovation costs as a deterrent to start renovating their home. This rises significantly to 45% among the 40-49 age group.
- While 21% state challenges to financing (e.g. insufficient savings, high interest rates, difficulty getting approved) rising to 27% among 30-39-year-olds.
- There is also evidence of barriers to affording a renovation for those who own older homes compared to newer homes; significantly more respondents with homes built before the year 2000 state high renovating costs as a reason to not have renovated yet, than just 30% of those who have a home built in the years 2000-2025.

Building year and % who state high renovating costs to be a barrier to renovation



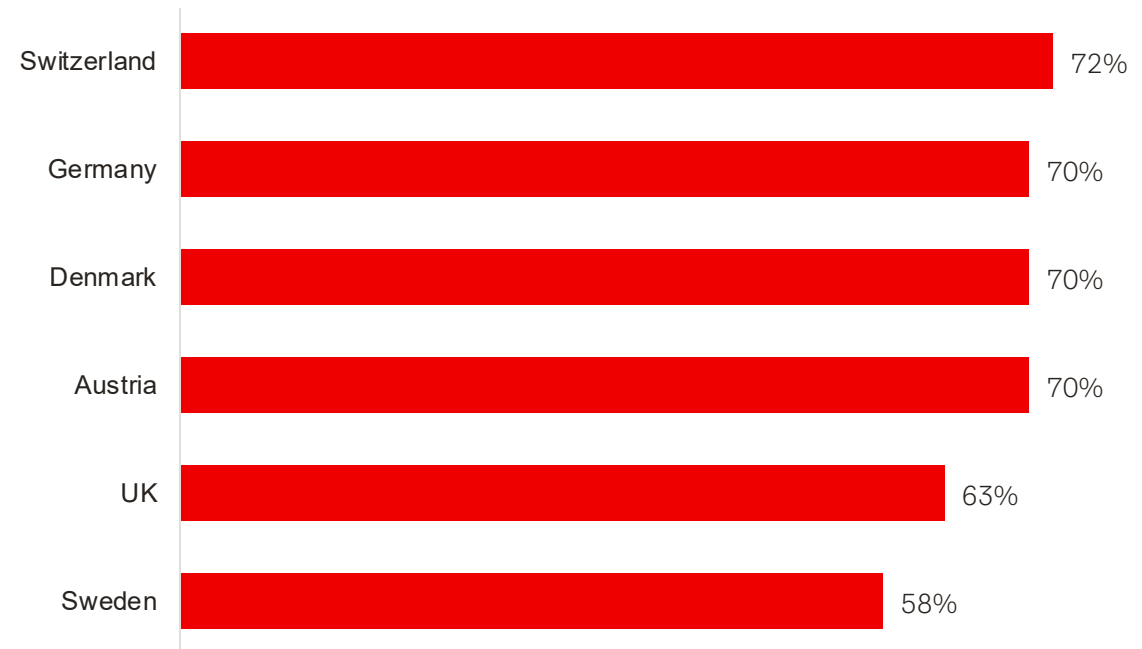
Q17. How satisfied are you with the following aspects of your current home? (Affordability)  
 Q. Q16. Are there any specific reasons why you have not already started renovating your home?



## High housing costs are a **key reason for moving or considering a move** to a new home

- Housing costs becoming too high at their previous home was a factor in influencing moving decisions for 18% of respondents in the last 5 years and is a key reason for considering moving to a new home for 15%.
- For renters, this is felt more acutely, with 19% of renters feeling that high housing costs are a reason to consider moving compared to 10% of homeowners.
- Those in Sweden and the UK are the least likely to be satisfied with the affordability of their current home (mortgage or rental costs), with only 58% in Sweden and 63% in the UK saying so, compared to 67% of all respondents globally.

Satisfaction with Affordability of existing home, by market



Q17. How satisfied are you with the following aspects of your current home? (Affordability)  
Q. Q16. Are there any specific reasons why you have not already started renovating your home?

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# Indoor Climate, Adapting to Extreme Weather, & Daylight

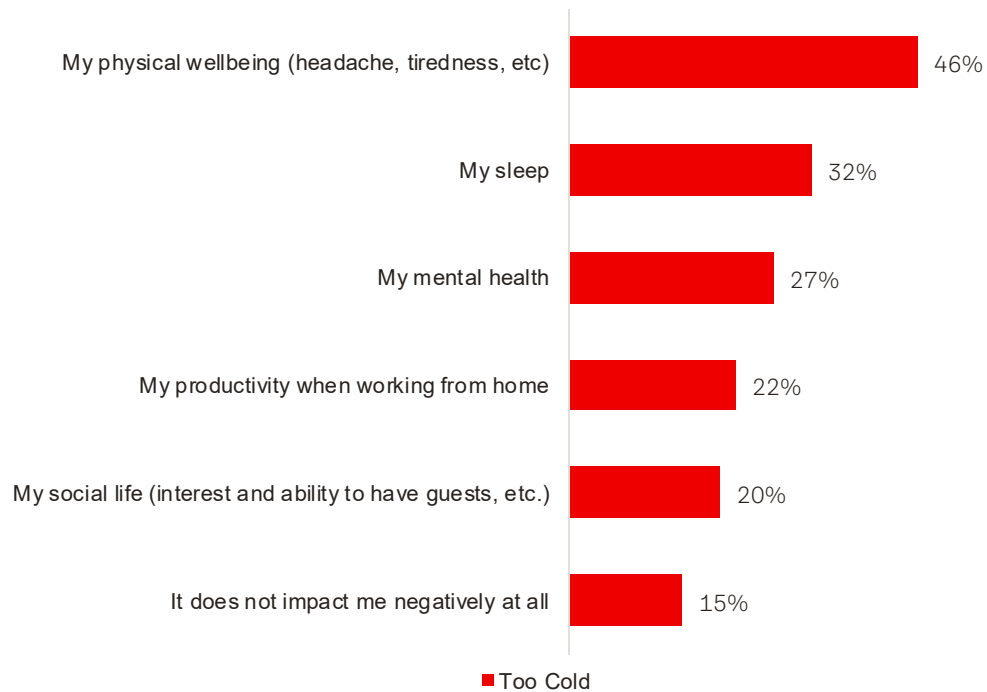


# Temperature regulation is important, with respondents stating it impacts their home satisfaction levels

Cold homes have a negative physical impact on nearly half of global respondents



Impact of properties being too cold in the winter



Q18. Please select all the statements you agree with about your current home (Too cold in summer)  
Q19. How does this negatively impact you?.



## Indoor Climate

### Over a quarter (26%) of respondents believe their homes are too cold in the winter

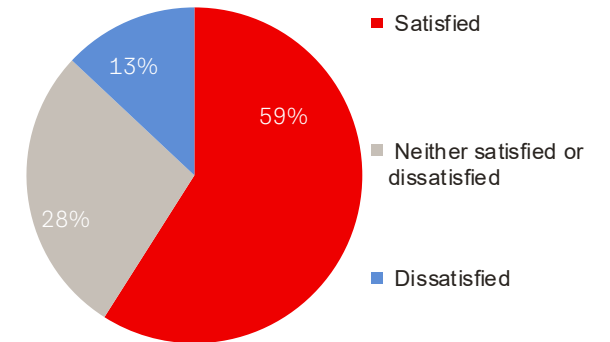
- Over half (55%) of those who feel their home is too cold in the winter state they are dissatisfied with their home. This indicates that temperature regulation has an important role to play.
- 36% of UK respondents feel that their house is too cold in the winter, significantly more than all other markets.
- 55% of German respondents feel that their home being too cold in the winter negatively impacts their physical wellbeing, significantly more than other markets
- While a third in the UK feel that a cold home in the winter impacts their productivity when working from home, significantly more than all other markets
- 14% of global respondents feel that there is poor ventilation and indoor air (pollution, humidity) in their current home.
- 48% of respondents who have renovated their home to improve energy efficiency are motivated by a desire to improve indoor comfort and health.
- 14% of global respondents believe that climate change is making them prioritise heat protection in their housing decisions.

Q18. Please select all the statements you agree with about your current home (Too cold in summer)  
 Q19. How does this negatively impact you?

### While 59% are satisfied with their home's ventilation/air quality, it varies by age, age of home and living situation

- Over 50s are significantly more likely to be satisfied with the ventilation and indoor air quality of their home, than those aged 18-49; 60% of 50-59-year-olds, 69% of 60-69-year-olds and 79% of 70-80-year-olds are satisfied, compared to 53% of 18-29-year-olds and 52% of 30-50-year-olds.
- Those in newer homes are significantly more likely to be satisfied with the ventilation and indoor air quality of their home; 61% of those with homes built from 1970-1999, and 71% of those with a home built in 2000-2025 are satisfied.
- Those respondents who live with their friends are significantly less likely to be satisfied with the indoor air quality & ventilation of their home, only 45% say they are satisfied.

How satisfied respondents are about the ventilation and indoor air quality (temperature, pollution and humidity) in their home



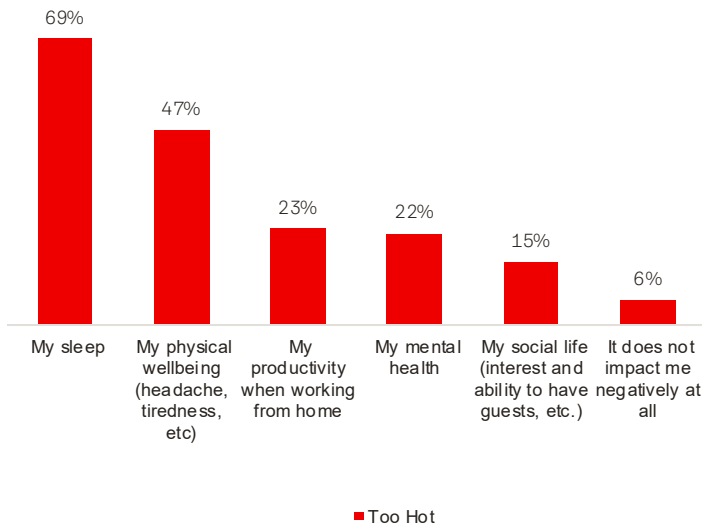
# Despite extreme heat impacting daily life, few are motivated to upgrade their home

**26% of respondents respectively believe their homes are too hot in the summer**

**15% of respondents are considering renovating to better protect their home against extreme weather...**

**However, respondents are changing their behaviour rather than upgrading their homes...**

Impact of properties being too hot in the summer

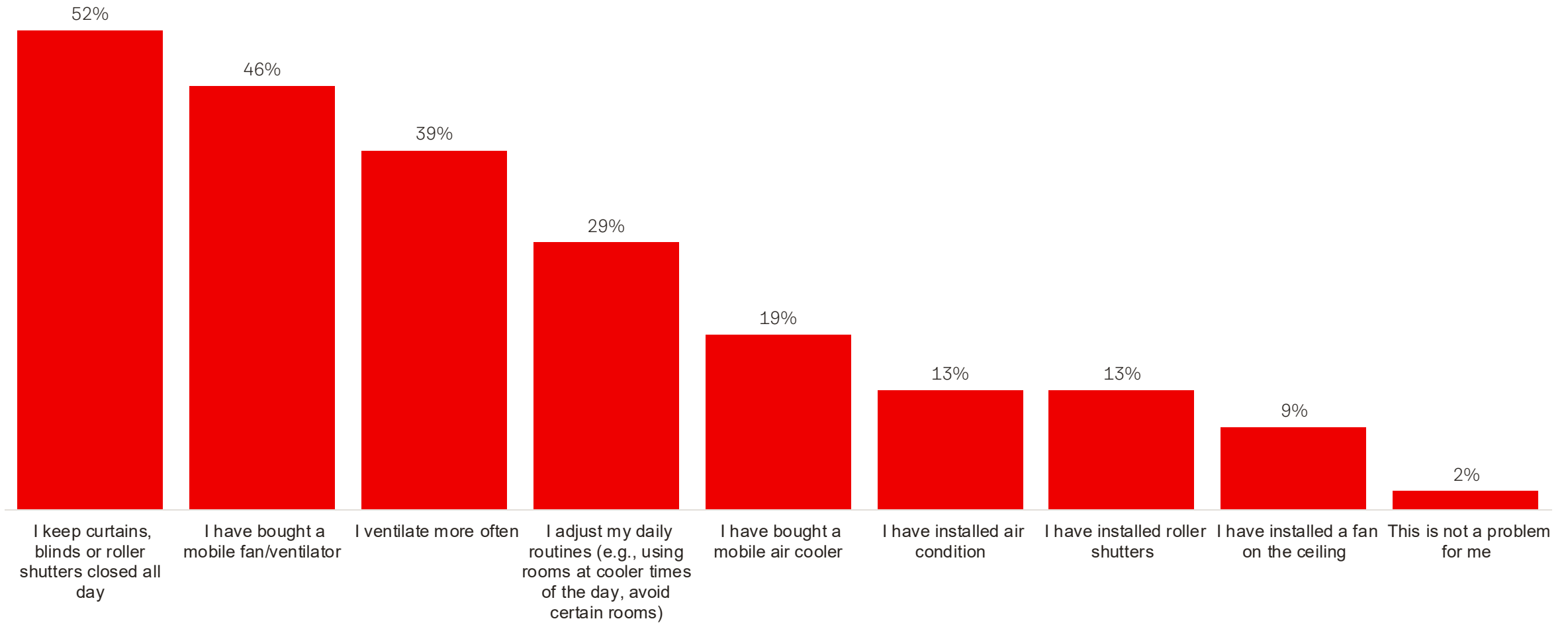


- This rises to 35% of those who are considering replacing the existing roof and 28% of those who are considering replacing existing roof windows in the next 5 years. Additionally, individuals who have replaced their roof in the past are more likely to have done so to better protect their home against extreme weather (33%).
- 15% of respondents have renovated their home to better protect it against extreme weather, this rises to (23%) of individuals in the UK.
- However, only 6% of global respondents believe that having better protection against extreme weather is a key reason to move home. This rises to 10% for those who live in newer property built between 2000-2025.
- Individuals living in the UK are the most likely to state that having better protection against extreme weather was a key reason to have moved home (8%).
- Respondents aged 18-29 years old are more likely to state their home is too hot in the summer (32%). Renters are also more likely to state this (31%) compared to (21%) of homeowners.

- Of the respondents who believe their home is too hot in the summer, just over half (52%) cope by keeping their curtains, blinds or roller shutters closed all day. Individuals aged 60-69 years are the most likely to adopt this coping strategy (64%) compared to 39% of 18-29-year-olds.
- Individuals who work from home 1-2 days per week or 5 days or more per week are more likely to have bought a mobile air cooler (both 23%).
- Individuals in Denmark have adjusted their behaviour by ventilating their property more (57%). Whilst those in Sweden are the most likely to have upgraded their home by installing technology features such as air conditioning (22%).
- Individuals in the UK are more likely to say they have coped with their property being too hot in the summer by adjusting their daily routines (42%).

Q18. Please select all the statements you agree with about your current home (Too hot in summer)  
 Q19. How does this negatively impact you?  
 Q20. How are you coping with heat or poor indoor climate during summer?

How are you coping with heat or poor indoor climate during summer?



Q18. Please select all the statements you agree with about your current home (Too hot in summer)  
 Q19. How does this negatively impact you?  
 Q20. How are you coping with heat or poor indoor climate during summer?

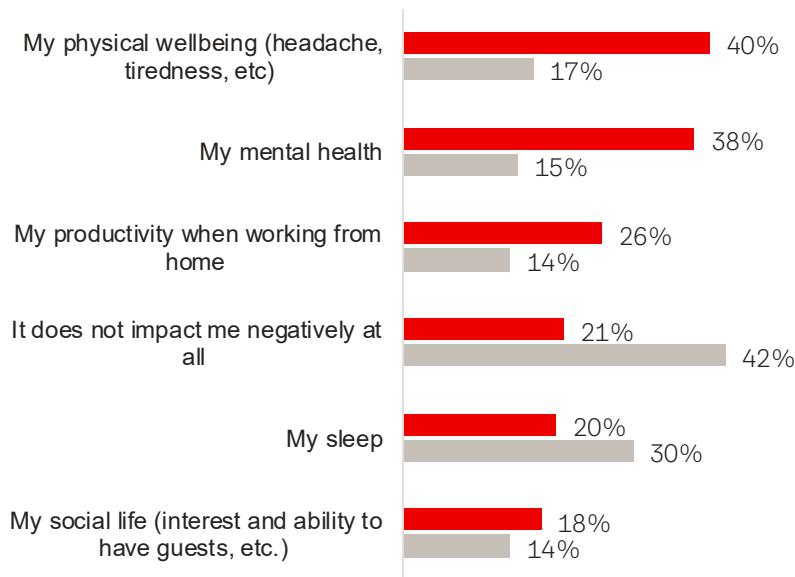
# While 40% agree that limited daylight impacts their physical and mental wellbeing, only 11% would move home to have access to more daylight

**70% of respondents are satisfied with the amount of natural light in their current home.**

However, 16% of global respondents believe their home does not have enough natural light, which has mental, physical and social impacts.

### Impact of light levels on respondents

■ Too Little light ■ Too Much light



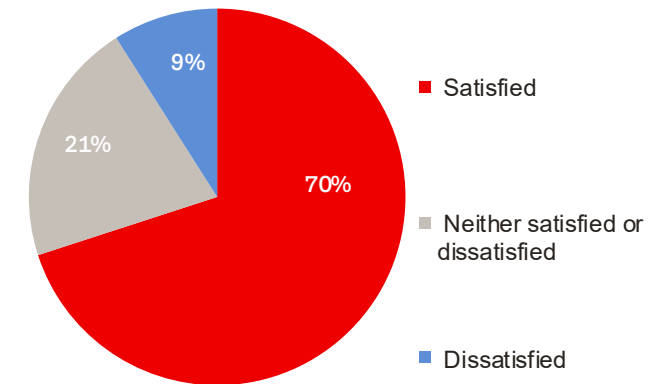
**Homeowners have more autonomy over moving to get more natural light, compared to renters**

- Desire for a home with more natural light is an influencing factor in moving within the past 5 years for 13% of respondents globally.
- Homeowners are more likely to state they have moved home in the past due to a desire for a home with more natural light (16%) compared to 12% of renters, suggesting homeowners might have more agency in choosing to increase their daylight access.
- Desire for more daylight access in their home is a key reason for 15% of respondents having undertaken renovation projects in the last 5 years, with younger generations (18-29-year-olds) appearing to be most daylight conscious (22%).
- However, despite believing this 18-29-year-olds are also the most likely age group to believe their home does not have enough natural light (20%) compared to 16% of all global respondents.
- 15% of global respondents are considering renovating their home in the next 5 years due to a desire for more natural light in the home. This is higher amongst those who work from home 3-4 days a week (21%). Individuals living in a major city are also more likely to state this (18%).
- Respondents in Switzerland are significantly more likely to be considering renovating their home in the next 5 years due to a desire for more natural light in the home (20%).
- Individuals aged 30-39 years old are significantly more likely to state their physical wellbeing is impacted by too little daylight in their home (49%), whilst individuals who work from home 1-2 days per week are more likely to say their productivity when working from home is impacted.

**However, only 11% believe access to daylight is a key motivator in moving to a new house.**

- This suggests that although respondents appreciate the added benefits of having access to natural daylight in their homes, it is more of an added extra than an essential element. There is a gap in consumer knowledge of the link between daylight access and wellbeing.
- In contrast to this, individuals who have already renovated or plan to renovate appear more daylight aware. With individuals who are considering adding roof windows where none existed before and those who are considering replacing existing roof windows in the future considerably more likely to renovate their home to improve daylight levels (42%) and (31%) respectively.
- Just 9% of respondents believe their home has too much light, which negatively impacts their quality of sleep (30%).

### How satisfied respondents are about the amount of natural light in their current home



Q18. Please select all the statements you agree with about your current home (My home has too much natural light, My home has too little natural light)  
 Q. 17. How satisfied are you with the following aspects of your current home? (Amount of natural light in the home)

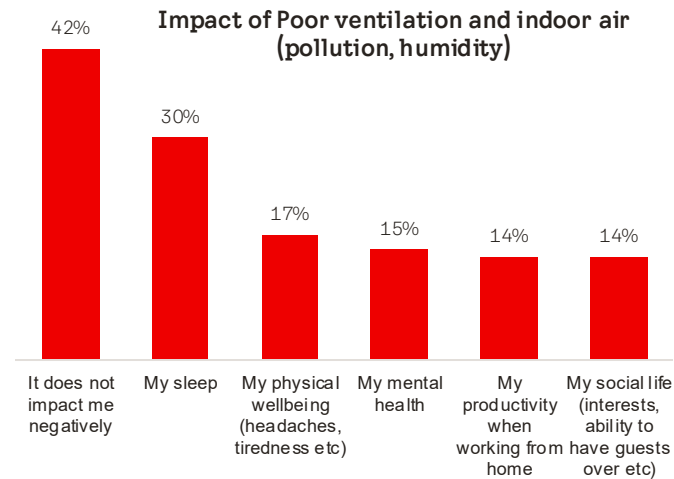
# Ventilation & Air Quality



# Desire for better ventilation & indoor air quality can influence the decision to move home or to renovate, but energy efficiency remains a barrier to ventilation

## 59% of respondents are satisfied with the ventilation and indoor air quality in their current home

- However, 13% say they are dissatisfied, while 14% agree that their home has poor ventilation and indoor air.
- The impact of poor ventilation and air quality is widespread, affecting sleep for 39% of respondents, as well as physical and mental health.
- 55% of respondents in both Sweden and Austria say poor ventilation and air quality affects their physical wellbeing, and 43% in Sweden say it impacts their sleep. While 28% in Germany say it impacts their social life.



## Ventilation is limited in winter despite desire for better air quality

- Over a third (36%) of global respondents ventilate their home once a day during winter, while 29% ventilate 2-3 times a day.
- Austrians ventilate their homes the most often with (12%) stating they ventilate 4 or more times a day whilst those in Sweden are the least likely, with (26%) stating they ventilate their home less frequently.
- 17% say they ventilate their home a few times a week or less in winter, and 40% say they feel they should ventilate their home more often during the winter.
- Reasons for not ventilating the home during winter range from trying to save energy (38%) and forgetting to (36%) as well as wanting to avoid draught (28%) or concern about moisture/damp or mold (24%).
- Desire for a home with better ventilation or indoor air quality is an influencing factor in moving within the past 5 years for 11% of respondents globally and was a key reason for 15% of respondents undertaking renovation projects in the last 5 years.
- It is also a motivating factor for 12% of those considering moving to a new home, and for 16% of those considering renovating their existing home in the next 5 years.
- Likewise, 18% worry about the air quality in their home during winter

Q18. Please select all the statements you agree with about your current home (In my home there is poor ventilation and indoor air (pollution, humidity))  
 Q19. How does this negatively impact you?  
 Q23. What is preventing you from ventilating your home more frequently during winter?

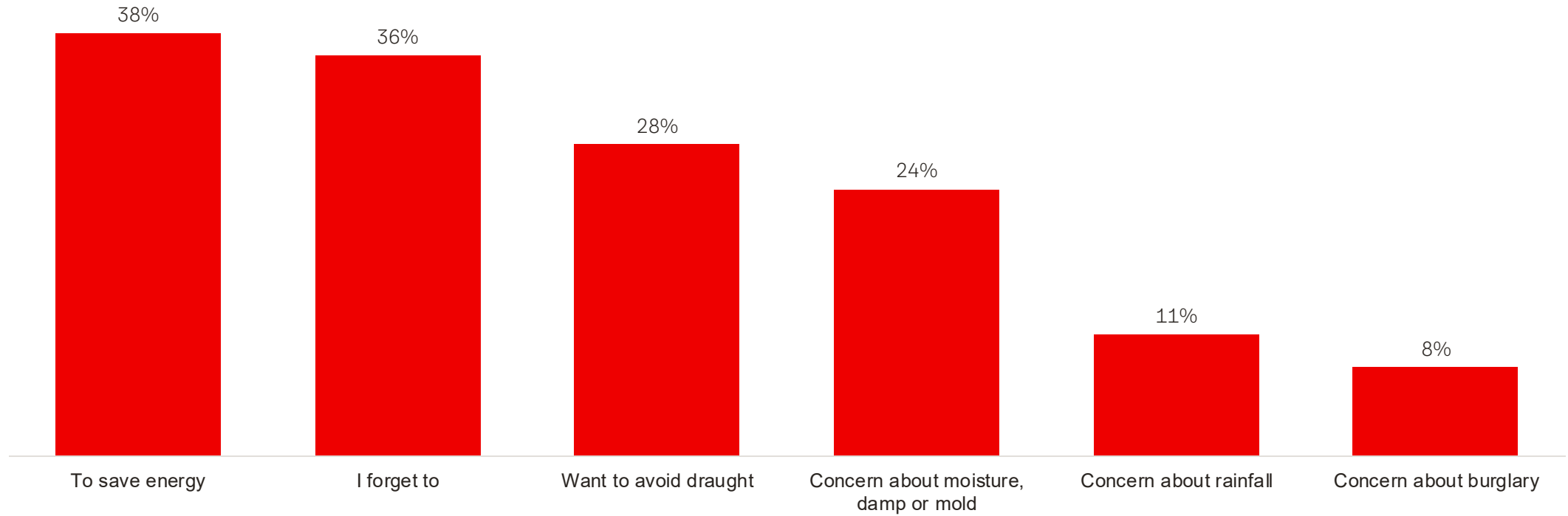


**Energy efficiency is a key concern and barrier to ventilation in the winter**

- 38% globally say they avoid ventilating their home in winter as they try to save energy. This rises to 44% in the UK, significantly more than all markets, and is also a bigger concern among the older age groups, with 47% of 60-69-year-olds stating it as a concern.
- Individuals who are considering adding or replacing solar panels (photovoltaics) in the next 5 years are considerably more likely to state that a desire to save energy prevents them from ventilating their home more frequently in the winter (55%).
- 30% globally say that rising energy costs are making them think differently about their home's energy efficiency, again rising most significantly in the UK to 43%, more than any other market.
- 44% of those who are considering adding or replacing vertical windows, dormers or glazed doors state that rising energy costs are making them think differently about their home's energy efficiency.

Q18. Please select all the statements you agree with about your current home (In my home there is poor ventilation and indoor air (pollution, humidity)  
 Q19. How does this negatively impact you?  
 Q23. What is preventing you from ventilating your home more frequently during winter?

What is preventing you from ventilating your home more frequently during winter?



Q18. Please select all the statements you agree with about your current home (In my home there is poor ventilation and indoor air (pollution, humidity))  
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# The Future of Home



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