



CHALLENGING MISCONCEPTIONS

Homeowner and housebuilder
attitudes to timber
windows and doors



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Foreword



Timber products look beautiful, are sustainable and offer exceptional long-term value. However, there are still outdated perceptions and myths surrounding the properties of timber. To dispel some of these common myths, we must understand how timber products are perceived by their two major audiences: housebuilders and homeowners.

As the trade body for woodworking and joinery manufacturers, the British Woodworking Federation (BWF) is devoted to championing the long-term value offered by timber. The danger in the current climate is that housebuilders and homeowners opt for alternative products that are (often incorrectly) deemed to cost less, perform better, or require less maintenance.

In addition, the recently announced five-year Strategic Plan from Homes England presents a large-scale opportunity for housebuilders and our members. But as a sector we must ensure that our timber products are in consideration for these high quality, affordable homes across England.

To find out more about buyers' perceptions over timber windows and doors, we commissioned a survey of housebuilders and homeowners. The findings, outlined fully in this report, revealed that while the aesthetic and value-adding aspects of timber products are recognised, housebuilders and homeowners alike mistakenly perceive timber maintenance to be far more onerous than is actually the case.

The survey also highlighted a common misconception that timber products are perceived as a premium product to be reserved for period properties. In truth, timber products can add value to any property and given the right basic maintenance, provide long-lasting performance.

To counter misconceptions, as a sector we need to work even harder to spread the word about timber and educate housebuilders and homeowners alike. And we need to find opportunities to do this directly. A key factor in misunderstandings about timber products is that housebuilders and homeowners rely on information from vendors, local networks, or Google rather than seeking out authoritative facts about timber products, how they perform, and the maintenance regimes required.

We must keep promoting the aesthetics of timber, while doing even more to educate on ease of maintenance, value, efficiency and sustainability. I know that with the passion and craftsmanship of our members, and with the support of the BWF as your trade association, we can ensure that timber's future remains bright.

Thank you for reading.

Helen Hewitt, Chief Executive,
British Woodworking Federation

INTRODUCTION

Exploring the current trends in window and door purchasing decisions

What shapes perceptions of timber windows and doors? Personal experience may be a factor for both housebuilders and homeowners, but attitudes can also be shaped by outdated information and myths about the properties of timber products – which presents a risk to our sector.

To discover buyers' perceptions and attitudes to timber windows and doors, the British Woodworking Federation (BWF) commissioned a survey of homeowners and housebuilders. We interviewed 1,500 homeowners and 150 individuals with responsibility for product specification within housebuilders to provide members with the latest market insight to inform the way we as an industry position timber products.

We spoke to studio flat dwellers, detached house owners and everyone in between, building up a picture of what influences window and door purchasing decisions and the common misconceptions that need to be challenged. We spoke to housebuilders employing fewer than 10 people, alongside firms employing more than 1,000.

Among housebuilders and homeowners alike, our research revealed some persistent misconceptions about the long-term cost represented by timber products and the time and effort required to maintain them. We also found a disconnect between what housebuilders think homeowners want, and what actually matters to homeowners - highlighting that education is needed for both audiences over their perceptions of timber products.

Here, we present our findings to help our members and the wider woodworking and joinery sector understand: **how do we best educate our audiences over the true value of our products?**



PART ONE

What do housebuilders look for when procuring windows and doors?

This section focuses on the attitudes of housebuilders towards timber products, and what affects purchasing decisions. Housebuilders ultimately procure windows and doors that meet regulations and match the aesthetic of their house type or development. The perception of homebuyers is important as they have aspirations for the type of property they are buying, and housebuilders need to have a clear, up-to-date understanding of what matters to homebuyers most.

In some cases, we found that certain perceptions over what homeowners want can lead to housebuilders specifying windows and doors that don't fully align with expectations. We tackle this in Part Three where we examine how housebuilder perceptions of what homeowners want differs from what homeowners say are key concerns for them.

Top priorities when procuring windows and doors

Three quarters (74%) of housebuilders specifying windows for new build homes say energy efficiency is a key factor, while 69% cited cost. In relation to door purchases, cost is the top issue (55%) closely followed by energy efficiency (51%).

It's likely that a key factor behind energy efficiency being a top priority for housebuilders is the proposed Future Homes Standard that will come into effect from 2025 and require new homes to achieve a higher energy efficiency rating.

The Future Homes Standard

This proposed legislation will require new homes to meet tighter energy efficiency requirements:

- Applies from 2025
- Aim to support goal of Net Zero UK carbon emissions
- New homes will produce 75-80% less carbon emissions than homes built under Building Regulations

'The number one factor that influences housebuilders in specifying windows for new build homes is **energy efficiency**'

Other factors in choosing windows for new build properties include enhanced security (52%), compliance with legislation (46%), ventilation (42%), aesthetic appeal (41%) and ongoing maintenance needs (39%).

When specifying doors for new build residential properties, aesthetic appeal was a key consideration for almost one third of housebuilders (29%), roughly on a par with compliance with legislation (33%) and ongoing maintenance needs (31%). Compliance with legislation was more of a consideration for doors than windows, but only 15% of housebuilders said third-party product certification influenced their choices.

Are housebuilders aware of the benefits of timber products?

Housebuilders can only make informed choices about the best products for the properties they build if they understand their fundamental qualities. In relation to timber products, common misconceptions about performance and maintenance of timber could lead to natural wood windows and doors being overlooked.

For example, housebuilders were positive about the contribution of coatings and finishes to the performance of timber products. Almost half (46%) said these were a way to regularly refresh and change the colour or appearance of timber windows. This is certainly the case, but far fewer housebuilders (35%) knew that protective coatings and finishes impact the lifespan of timber products, extending this to 50 years or beyond as well as reducing maintenance requirements.

This far exceeds the lifespan of alternatives such as PVC-U windows and doors which have a lifespan of 20-30 years, and still require maintenance to reach this, and aluminium which has a lifespan of up to 45 years. Timber products are also designed to be repaired rather than replaced, unlike PVC-U alternatives, making them a more sustainable option. Timber's sustainable properties and high energy efficiency compared to alternatives mean it's well-placed to meet Homes England's objective to deliver more sustainable homes.

Concerningly, two in ten housebuilders (17%) believe protective treatments are purely aesthetic and offer no additional benefit to timber windows. Clearly, more awareness is needed to ensure that housebuilders have all the facts about timber when specifying products.

BWF members have an important role to play in explaining how protective coatings and finishes can improve the performance of timber products, as well as giving the opportunity for aesthetic changes and enhancements. Many BWF members offer 10-year guarantees on products with an opaque finish, and seven years for products with a translucent finish.

'Only one third of housebuilders are aware that protective coatings can extend the lifespan of timber products to 50 years and beyond'

What matters most to housebuilders when choosing a manufacturer or supplier?

Housebuilders said these were the crucial factors in choosing a supplier



Windows

49%

Length of product guarantee

43%

Manufacturing and delivery timescales

37%

Membership of a reputable trade association (e.g BWF)



Doors

44%

Length of product guarantee

44%

Manufacturing and delivery timescales

39%

Ability to both supply and install products



Every home is good enough for timber

In our survey, 60% of housebuilders said they would specify timber windows for a new build house where they were required to be in keeping with the local area, such as a conservation area. A conservation area may be designated by a local Council where it is felt there are special historical or architectural elements that should be protected. Extra planning controls are applied in these areas, often including a requirement to use traditional materials for building elements such as windows and doors. However, this should not mean that the use of timber windows and doors is limited to these areas or only specified where special circumstances require.

The survey indicated a perceived connection between use of timber products and higher property values. Four in ten housebuilders (38%) said timber windows might be specified where a new build home was to be marketed at a specific value. Almost one third of housebuilders (29%) only specify timber windows for a new build where a client requests them.

The reasons why housebuilders are deterred from using timber products were based on misconceptions. The top reason cited is that they come with too much maintenance (47%). Just over a third (34%) say they are harder to source,

30% believe timber windows to be too expensive, and 29% think timber windows are harder to install.

Almost half of housebuilders perceive excessive maintenance to be a reason not to specify timber windows, despite awareness that timber products can enhance a property or even increase its value. It is true that timber windows require some maintenance to preserve their condition and performance, but the effort and cost required to achieve this is often overestimated. What's more, alternatives such as PVC-U also require maintenance, a fact that is often overlooked.

Many modern window coatings use an acrylic resin base which is designed to wear through erosion. It is easy to identify when a coating requires renewal - and then the coating is simply reapplied to increase the thickness to a reasonable level.

With improved awareness of the performance potential of timber windows and doors and the realities of modern maintenance, many housebuilders might be more likely to specify timber products. Further education for housebuilders on the value of timber for all property types is clearly required to address the perception that timber products should be reserved for properties of a certain value, or those located in conservation areas.



Where do housebuilders turn to seek information and build knowledge on timber products?

When it comes to finding out about timber products, nearly half of housebuilders (47%) go to a timber window manufacturer. Roughly the same number (42%) use Google or another search engine, 38% have an alternative material window/door supplier and 35% use a builders' merchant.

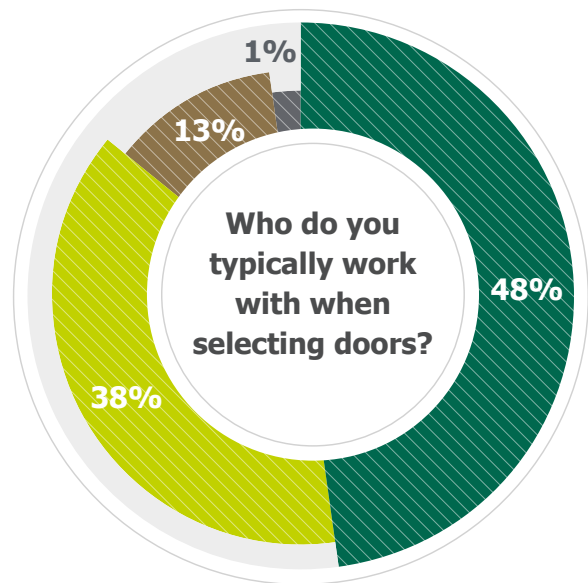
Around one third use a trusted institution for advice and support, such as the Home Builders Federation (HBF) or Royal Institute of British Architects (RIBA) (31%) while 21% use a timber-related trade association such as the BWF.

It is encouraging that housebuilders still primarily turn to the trade to find out about products and to identify suppliers. However, lingering misconceptions re-emphasise the need for further education on the value of timber, and it's down to us as an industry to play a leading role in this.

It is important that vendors of timber products offer detailed information about their products, including maintenance requirements. Increasing the circulation of accurate information should help to develop greater awareness of the potential of timber windows and doors and ensure accurate sources are referred to by specifiers when making purchasing decisions.

BWF members are in a prime position to help shift perceptions. On the BWF website you will be able to find a host of useful information and publications covering timber windows and doors, all of which can provide value to housebuilders coming to a purchasing decision.

Who do you typically work with when selecting doors?



- One company supplies and installs
- Separate companies for supply and installation
- A company supplies and in-house team installs
- Other

PART TWO

What do homeowners look for when buying windows and doors?

We've explored the attitudes of housebuilders and what impacts their procurement of timber windows and doors, and now we focus on the perceptions of homeowners to gain insight into drivers behind the repair, maintenance and improvement (RMI) market. We interviewed 1,500 homeowners to give us a clear picture of what influences window and door purchasing decisions and the common misconceptions that need to be challenged.

As would be expected, cost is paramount for homeowners looking for windows and doors, but it's not the only consideration. Appearance, durability, security and energy efficiency are also common factors.

However, we identified a number of misconceptions about timber that contribute to homeowners choosing alternative materials for the windows and doors in their properties. Proper guidance and advice can provide homeowners with the facts they need to make informed decisions about the type of windows and doors that are right for them.



Top priorities when choosing windows and doors



Windows

Cost was the most important consideration for 73% of homeowners when choosing windows for a property. Half (50%) cited U-values or energy ratings, 35% said security and safety and 22% aesthetic appeal. Factors such as style choice, guarantees and being able to use a recognised installer scheme were less important.

Perhaps surprisingly, product lifespan of a window was important to just 19% of homeowners, and ongoing maintenance needs (10%) were also relatively unimportant. We know cost is the most important consideration for homeowners, and lifespan is an integral part of the cost of timber windows over their lifetime. Therefore, providing information on the longevity of timber windows compared to alternatives can better position timber as a cost-effective option for homeowners. Timber's natural insulating properties compared to other alternatives such as PVC-U and aluminium also need to be communicated as this can mean a long-term cost saving on energy bills.

Priorities for purchasers of period properties were similar, with overall cost (59%), energy efficiency performance (44%) and security and safety (37%) being the top issues. However, if homeowners can be convinced of the relative cost and energy rating benefits associated with timber windows and doors, aesthetics could take on a more central role in purchasing decisions.



Doors

Interestingly, homeowner expectations for doors skewed more towards product lifespan and maintenance requirements. Two thirds (67%) of homeowners would look for longevity of the product, 57% would expect minimal maintenance, 46% want high energy efficiency performance and 44% would look for security and safety features. This puts timber in a good position, but education needs to focus on the relatively straightforward maintenance requirements, and the extended lifespan this can deliver.

When selecting a manufacturer of doors, key priorities for homeowners were length of product guarantee (47%), ability to both supply and install products (44%), company reputation and previous customer feedback (39%), manufacturing and delivery timescales (30%) and membership of a reputable trade association such as the BWF (28%).

44%

of homeowners expect enhanced safety features included in new doors. Important features to consider include:

- PAS 24 - enhanced security
- BS EN 12150-1 safety glazing - toughened glass
- BE EN 14449 - safety glazing - laminated glass

Are homeowners well informed about windows and doors?

A lack of familiarity with timber products can lead to misconceptions about their cost, performance and durability. Some homeowners are required to have timber products (for example, within a conservation area or due to listed status). Where timber products are not required, the woodworking and joinery sector as a whole needs to share its knowledge on the benefits of timber products.

Misconceptions understandably linger among homeowners who don't live in properties with timber windows and doors. Less than a third (33%) of these homeowners believed timber windows reduce the total costs of home ownership, and only 40% saw timber windows as offering high energy performance. It's important therefore that manufacturers understand a customer's current situation before providing information over timber products, as those potentially switching from other product types may require a greater level of detail over benefits.

The realities of timber maintenance also need to be communicated to homeowners. Less than half (42%) of homeowners knew that protective coatings and finishings could help windows reach a 50-year lifespan with minimal additional maintenance.

Homeowners saw the cosmetic role of protective coatings and finishings as equally important to protection of the product. Fewer than one third (30%) of homeowners knew that maintenance could extend the lifespan of timber windows beyond 50 years. There is a need to educate homeowners on the maintenance of timber products and that simple measures such as having protective coatings and finishes can extend the lifespan of timber products.

8%

of homeowners (1 in 10) believe protective coatings and finishes to timber windows are purely aesthetic. What are the real benefits?:

- Extend product lifespan
- Reduce requirement for maintenance
- Offer ability to refresh product appearance
- Enable colour changes to suit customer taste

The number of homeowners living in homes with timber windows



Some timber windows



No timber windows

● Period property homeowners ● Homeowners

Do your perceptions measure up?



Compared to alternatives (aluminium/PVC-U) timber windows...

% of housebuilders who agree

% of homeowners who agree

...cost more to purchase and install

70%

57%

...have a shorter lifespan

69%

70%

...have the same U-value performance

60%

35%

...are more sustainable

61%

56%

Timber windows...

...reduce total cost of home ownership

55%

30%

...offer high energy efficiency performance

63%

40%

...offer a wide variety of style and design options

77%

59%

Where do homeowners look for information about windows and doors?

Finding reliable, easy-to-understand information about windows and doors can help homeowners make an informed choice about what is right for their property. However, in a lot of cases they look to less authoritative sources of information to help them select new windows and doors.

Google or other online search engines would be the first port of call for 59% of homeowners looking for timber windows and 54% of those looking for timber doors. Recommendations from friends and family would be sought by 45% of those looking to select a new timber door.

Local networks carry value for people, with 53% saying they would look to local or regional door fitters compared to 30% using national firms. Only 19% of homeowners said they would use an industry trade association for information.

How important is sustainable sourcing of timber?

A combination of shifting homeowner attitudes and government legislation means that sustainability factors are likely to become increasingly important considerations for housebuilders and homeowners alike in the coming years.

Timber products are a sustainable material that have a lower environmental impact than other alternatives, a fact that was recognised by 61% of housebuilders. This shows that while some progress has been made, there's still work to do to educate this audience over the sustainability benefits of timber.

When asked about checks they carry out on the timber used for windows or doors, 28% of homeowners check if timber is legally sourced under the UK Timber Regulation or the Forest Law Enforcement, Governance and Trade (FLEGT) regulations.

There is a real role for knowledgeable industry experts to help provide guidance and information to homeowners. While information from search engines and close networks might be valued, it can't offer the level of detail and authority that experienced professionals can provide. Providing homeowners with valuable knowledge and information will be key to building good relationships with customers and securing referrals with family and friends.

45%

of homeowners get recommendations from family and friends when selecting new windows'

Around a quarter (25%) of homeowners check if a window or door supplier is certified under a scheme such as the Forest Stewardship Council (FSC) or the Programme for the Endorsement of Forest Certification (PEFC). Almost one in ten homeowners (9%) also check timber species against the CITES list of species under threat.

The source and sustainability of timber was important for almost half (48%) of all homeowners, and nearly three quarters (73%) of period property owners. While almost one third of homeowners (31%) don't carry out any sustainability checks, given general sustainability trends, we would expect this figure to decrease over time. This makes it ever-more important for our industry to highlight where our timber comes from.

PART THREE

Do housebuilders understand what really appeals to homeowners?

Housebuilders and homeowners have different priorities when choosing windows and doors, and housebuilders perceptions of what homeowners want don't always mirror what homeowners say are key factors for them.

Housebuilders perceived energy efficiency (55%), longevity (49%) and minimal maintenance (48%) to be the most important window-related factors for homeowners buying new build properties. Whereas homeowners said their top issues were cost, energy efficiency and security.

Issues around appearance and flexibility were perceived to be important by housebuilders. Four in ten (39%) housebuilders believed having a range of window designs and styles to choose from was important for homeowners, 34% believed ability to change the aesthetic (for example, by repainting in a different colour) mattered and 30% believed it was crucial to homeowners to have a complementary range of doors and doorframes.

When procuring doors, housebuilders said security (53%), minimal maintenance (45%) and energy efficiency performance (40%) were the most important factors for homeowners in selecting doors. The survey suggested that for homeowners, the lifespan of a door (longevity) (67%) was actually the most important factor, followed by minimal maintenance (57%) and energy efficiency (46%).

Our membership has a role to play in challenging these assumptions about what homeowners want from their windows and doors and demonstrating to housebuilders that timber windows and doors can meet the expectations of potential homeowners that we've identified from our research.

Top three issues

What housebuilders think matters most to purchasers



Windows



Door

1



Energy efficiency



Security

2



Longevity



Minimal maintenance

3



Minimal maintenance



Energy efficiency

What really matters most to purchasers



Windows



Door



Cost



Longevity



Energy efficiency



Minimal maintenance



Security



Energy efficiency

PART FOUR

Flying the flag for timber products

This report revealed some real positives around attitudes, among both housebuilders and homeowners towards timber products. However, it also highlighted some persistent misunderstandings about the value represented by timber products and the amount of time, effort and outlay required to maintain them. So, what can be done to correct these misconceptions?

BWF members and the sector at large can play an invaluable role in changing perceptions – providing information and guidance about how minimal maintenance can ensure timber products perform well, outlasting alternatives such as PVC-U and aluminium and delivering much better value in the long run.

Timber windows and doors shouldn't be thought of as prestige products that are only for certain types of properties. Any property can be enhanced by the joy of real timber. What's more, today's environmentally conscious homeowner will have peace of mind that they have chosen a product made from a sustainable material that has options for recycling at the end of its service life.

The scale of the opportunity presented by Homes England's five-year Strategic Plan should act as a driver for our sector to address misconceptions about timber products, and ensure they are considered as part of an accelerated home build programme.

As a BWF member, you have a powerful role to play in sharing information that corrects misconceptions about timber products. Over time, educating people about timber will help to pull down the barriers to choosing natural wood products.

Education is needed to address concerns about timber products

1 Value and energy efficiency

Timber products can achieve excellent energy efficiency to keep bills down. While initial purchase costs might be higher than products made from alternative materials, timber windows and doors can deliver much better value in the long run due to their extended lifespan, when maintained correctly.

2 Aesthetics

Timber windows and doors are available in a wide range of designs, styles and finishes, and their colour can easily be changed to meet homeowner preference. But, timber products are still too closely associated with just period properties and houses with higher price tags. More education is needed to convince housebuilders and homeowners that a superior aesthetic appearance doesn't necessarily mean more expense, maintenance, or poorer energy efficiency.

3 Ease of maintenance

People commonly think that timber products require far more maintenance than is actually the case. Many BWF members offer 10-year guarantees on products with an opaque finish and seven years for products with a translucent finish. When maintenance is required, it's often a case of reapplying a coating to increase the thickness to the original level - far from the ordeal that is sometimes imagined.

