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HROC

SUSTAINABLE HOUSING: WHAT DO CONSUMERS REALLY THINK?

2025

INTRODUCTION

Whilst some research exists around public awareness of new technologies such as heat pumps, there is far less known about consumer attitudes to a more blended mix of solutions which could meet the requirements of the Future Homes Standard (FHS).

As specialists in the trade and construction sector, Eureka! and HROC have joined forces to contribute to the evidence base ahead of the much-anticipated FHS guidelines for the housebuilding sector. Our unique insight approach allows us to shine a light on those consumers that are most likely to be purchasing property in the near future, thus providing valuable evidence to help inform our clients in this key category.

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THE CONTEXT

DECARBONISATION

The UK is committed to reaching Net Zero by 2050.

The Climate Change Committee, the government's statutory adviser, has recently reported that although low-carbon technologies are becoming cheaper, uptake remains low.

Some sectors such as the energy sector have made strong emissions reductions to date, whilst other sectors such as buildings will need to act faster.

HOUSEBUILDING TARGETS

The new Government has committed to tackle the housing crisis and set new local targets to enable 1.5m new homes to be built over the next 5 years.

Buildings and homes are responsible for more than 40% of the energy we use, so carbon reduction across this new housing is an essential part of meeting net-zero targets.

FUTURE HOME STANDARD (FHS)

The FHS will require new build homes in England and Wales to offer world-leading levels of energy efficiency and deliver 75%-80% less carbon emissions under previous Building Regulations. Scotland has a separate New Build Heat Standard.

Heating that requires fossil fuels such as gas boilers will no longer be allowed and new builds must be 'future proofed' to benefit from decarbonisation of the electricity network.

The new regulations were originally meant to be in force by 2025.

IMPLEMENTATION AND COMPLIANCE

There has been much debate about the mechanics of the FHS with many commentators suggesting that the proposals do not go far enough; too much focus on insultation and heating systems but not enough on efficient energy use and building materials.

Many have also been frustrated by the lack of urgency in implementation, most notably the delay in the Gas Boiler phase-out.

Whilst the sector awaits the final building regulations requirements, many responsible builders are already preparing and getting 'ahead of the curve'.

In preparation for implementation, many industry commentators have been discussing the preparedness of the sector ahead of the much-anticipated final government proposal in 2025. Although infrastructure and supply chain naturally dominate early discussions, it is also apparent that the consumer journey will also be a critical enabler of a successful FHS implementation across the housing sector.

EXECUTIVE SUMMARY

As the new Labour Government pledges to build 1.5 million new homes over the next five years through planning reforms, release of green belt and mandatory housing build targets at a local level, decision makers in the construction industry should take note that our research found consumers want policy makers to place even more importance on energy efficiency and decarbonisation.

Around 230,000 new homes were built and sold last year, a rate of build that has been falling rather than gaining momentum. Our research found appetite for new homes peaks for the next generation of 25- to 34-year-olds, as first-time buyers lead the way in creating demand for new builds, and 46% of this age group place importance on sustainable solutions. According to our figures, the East of England is a particular sustainability hot spot, with 86% of consumers interviewed responding it is important the government prioritises energy efficiency and decarbonisation in the future UK housing stock. Closely followed by 83% of consumers in Scotland and the North East and 82% of Londoners.

Our study also found potential new home buyers place sustainability equal with location on their wish list. Below quality of build and price and above local community initiatives and facilities. Although 78% of consumers believe a sustainability policy is generally important, there is work to do to convince potential homebuyers to pay more for sustainable homes; one quarter currently indicate they would be willing to pay more for a home built in accordance with FHS Interestingly, our data shows there is currently more emphasis placed on construction methods and materials, than on facilitating consumers to live a greener/lower impact lifestyle (36%) suggesting there also work to do on communicating the consumer benefits of sustainable living.

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EXECUTIVE SUMMARY [cont.]

While Brits looking to save on rising energy bills are prioritising insulation and triple glazing from new homes, the housing sector has been slow to adopt air source heat pumps. Our report found consumers are most likely to place energy efficiency measures such as better insulation and triple glazing – 58% and 44% respectively – in their 'wish list' for future housing. Closely followed by solar panels, with over one third of consumers saying these are also an important technology to prioritise.

Just 1 in 6 consumers state that low temperature systems such as Air Source Heat Pumps are an important area to focus on. Highlighting the work Heat Pump manufacturers still need to do to educate consumers on the sustainability benefits of this technology, 32% of consumers interviewed say they would be nervous to buy them. Our data highlights a significant age difference in consumer confidence in heat pumps with 12% of 25 to 35 years olds, 38% of 45- 54 years olds, and 51% of those 65 yrs+ nervous with the technology.

While current official estimates vary on the cost of implementing FHS, it is anticipated the average cost of construction will be at least £5,000 per property. Navigating these price increases with consumers whilst also 'selling' the advantages of lower energy bills is a key challenge for house builders going forwards. Our results show that although 50% of all consumers currently expect these costs to be absorbed by the sector, there is a growing willingness amongst those more active in the new build market that they will need to pay more. The good news for house builders is that 45% of those actively in-market state they would be prepared to pay significantly or slightly more for a sustainable home of the future, especially the next generation.

FINDINGS

- WHICH CONSUMERS ARE DRIVING DEMAND FOR NEW HOMES?
- WHAT DO CONSUMERS THINK OF THE GOVERNMENT'S NEW HOMES PLEDGE?
- WHERE IS THERE MOST DEMAND FOR NEW HOMES?
- NEW HOME APPETITE AND TASTES
- WHAT DO NEW HOME BUYERS WANT?
- ARE SUSTAINABLE HOMES IMPORTANT TO FUTURE HOMEBUYERS?
- WHO IS DRIVING THIS DEMAND FOR SUSTAINABLE HOMES?
- THE NEW HOME BUYERS' WISHLIST
- WILL CONSUMERS PAY MORE FOR SUSTAINABLE HOMES?
- WHERE ARE THE ECO CONSCIOUS HOME BUYERS?
- WHICH 'GREEN TECH' IS TOP FOR NEW HOME BUYERS?
- WHAT DO NEW HOME BUYERS EXPECT THE FHS TO PRIORITISE?
- WHICH CONSUMERS ARE LEFT COLD WHEN IT COMES TO HEAT PUMPS?
- WHO IS WARM TO SUSTAINABLE HEATING SOLUTIONS?
- DO CONSUMERS EXPECT TO ACTUALLY PAY MORE FOR SUSTAINABLE HOMES?
- REGIONAL VARIATIONS IN WILLINGNESS TO PAY

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FINDINGS

WHICH CONSUMERS ARE DRIVING DEMAND FOR NEW HOMES?

A majority agree (53%) with the broad policy direction of building 1.5m new homes over the new Parliament (5 years).

Many commentators have stated that we face a national housing shortage but that this target is unrealistic given the many hurdles that the construction sector currently face.

Our analysis suggests that this is a polarising issue; younger adults and those in the rental sector are more in favour of these ambitious targets than those more established in the ownership sector.

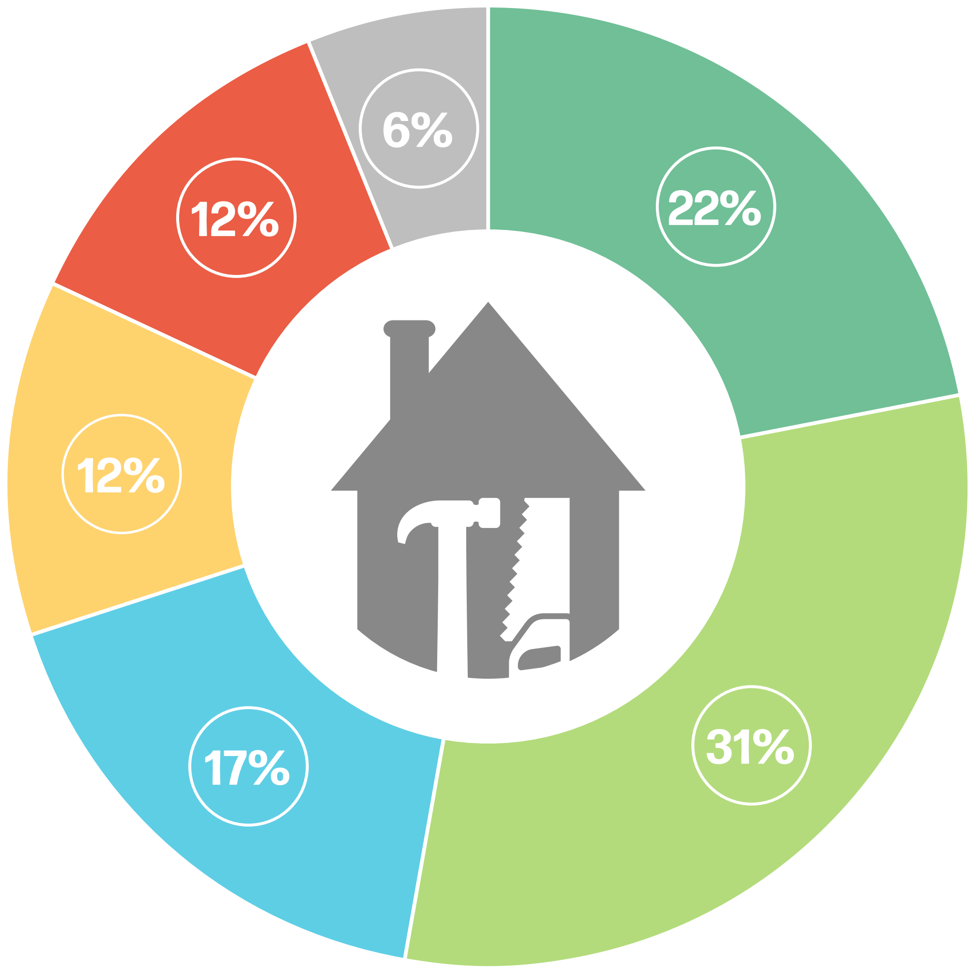
There also appears to be considerable regional differences in consumer acceptance of new house building.

Around 230,000 new homes were completed last year, a rate of build that has been falling rather than gaining momentum. Our data show that the thirst for new build (contemporary) properties is stronger amongst a younger profile of consumer.

FINDINGS

WHAT DO CONSUMERS THINK OF THE GOVERNMENT'S NEW HOMES PLEDGE?

A MAJORITY AGREE WITH GOVT POLICY ON BUILD TARGETS OF 1.5 MILLION NEW HOMES.



Significantly in favour
Neither
Significantly against
Slightly in favour
Slightly against
Don't know

53%

Over half are in favour of the broad policy direction of the new Government.

24%

Around one quarter reject the idea of mandatory building targets.

THE APPETITE FOR NEW HOUSING VARIES ACROSS DIFFERENT SEGMENTS OF SOCIETY.

HIGHEST SUPPORTERS

Those who perhaps feel currently excluded from the housing market appear to be more supportive of ambitious house building targets.

25-34 year olds	68%
New build preference	66%
Housing Assoc renters	62%
Private renters	62%

HIGHEST DETRACTORS

At the other end of the age spectrum, we see that resistance is a little higher to house building targets.

Own outright	32%
55-64 yrs	33%
65+ years	34%

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The new Labour Government has pledged to build 1.5 million new homes over the next 5 years through planning reforms, release of green belt and mandatory housing build targets at a local level. Broadly speaking, are you in favour of this policy? Base: 1,663.

FINDINGS

WHERE IS THERE MOST DEMAND FOR NEW HOMES?

WHERE ARE THE HOTSPOTS ACROSS THE COUNTRY?

Scotland	66%
North West	61%
East	35%
Greater London	70%
South West	39%

	Support	Against
North East	56%	21%
North West	61%	18%
Yorkshire & the Humber	45%	25%
East Midlands	49%	35%
West Midlands	44%	34%
East of England	45%	34%
Greater London	70%	11%
South East	45%	28%
South West	41%	39%
Wales	54%	20%
Scotland	66%	9%

NEW HOME APPETITE AND TASTES

PURCHASING A PROPERTY IS STILL A SIGNIFICANT AND RELATIVELY RARE EVENT

Purchased my property longer than 4 years ago.	47%
Purchased my property within the past 3 years.	13%
My property is currently up for sale.	2%
Looking to get my property valued by an estate agent.	2%
Definitely looking to purchase a property in the next 12 months.	7%
Likely to be purchasing a property in the medium term (2-3 years).	9%
Likely to be purchasing a property in the longer term (4 or more years).	8%
Difficult to say for certain.	11%
None of the above.	16%

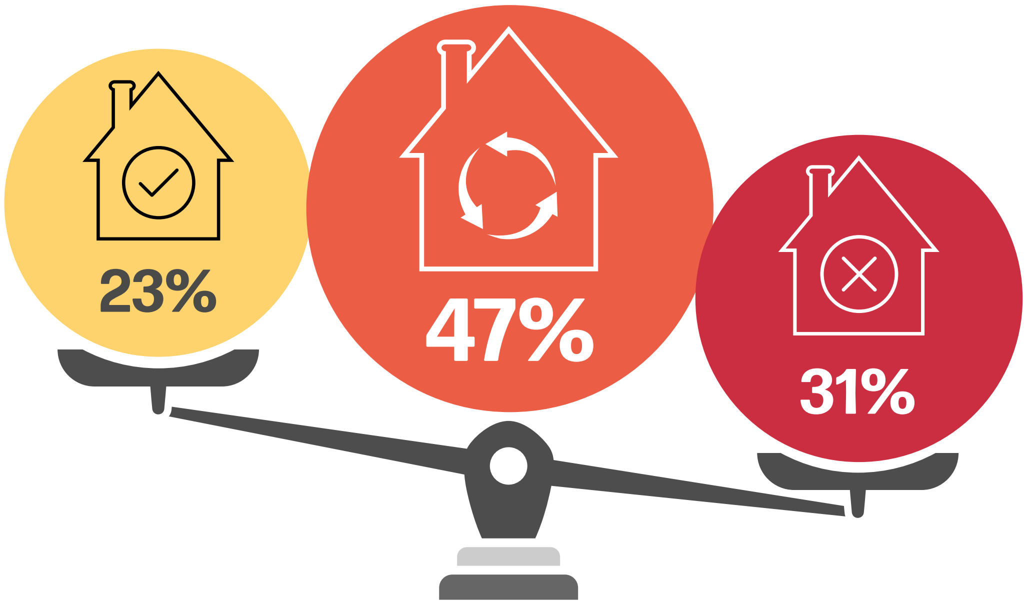
16%

1 in 7 of our sample of consumers are potentially 'in market' for a new property in the short-medium term.

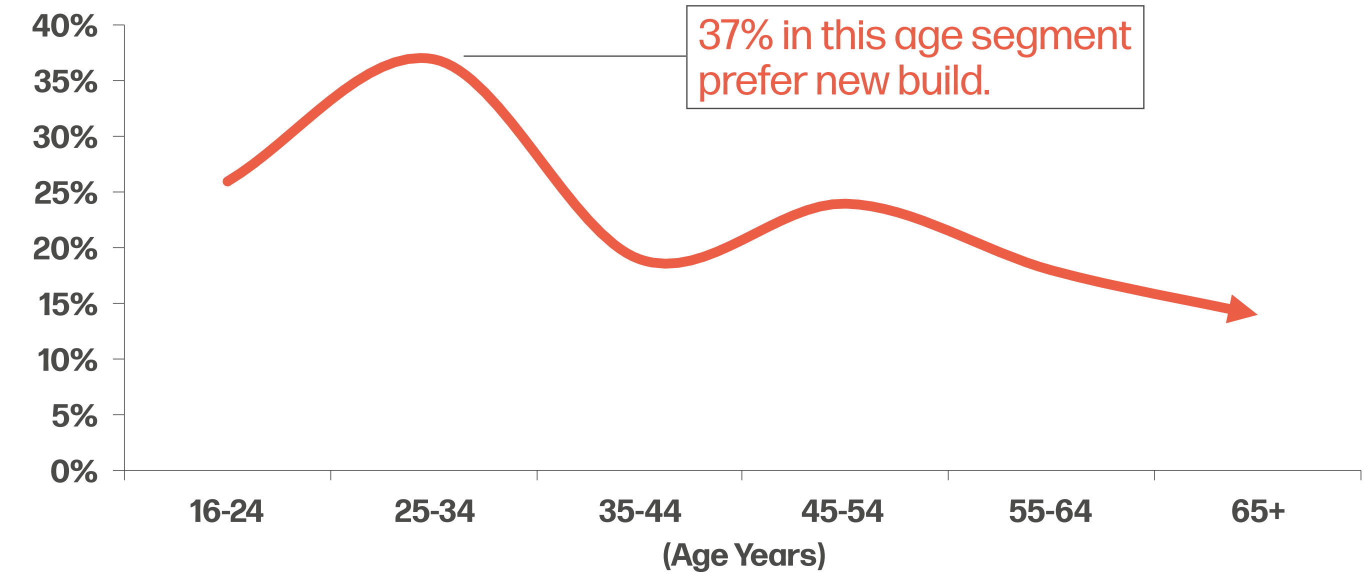
22%

Potentially increases to one-fifth if we expand time horizon to 4+ years.

...AND WE KNOW THAT CONSUMERS HAVE DIFFERENT TASTES WHEN THAT MOMENT DOES HAPPEN



- New build enthusiasts e.g. already own a new build or very strong inclination.
- On the fence - open to both styles of property.
- Reject new build or strong inclination towards older, traditional property.



Around 230,000 new homes were built and sold last year but we know that appetite for this part of the housing stock will vary by demographic and location. For instance, we can see that interest in new build style peaks for those aged 25-34 demonstrating the importance of this tenure for FTBs.

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Thinking of your personal living arrangements, which of the following, if any, apply to you? Base: 1,663
Overall, thinking of the style of property you like to live in, do you prefer living in... Base: 1,663

FINDINGS

WHAT DO NEW HOME BUYERS WANT?

Consumers think that housing developers should place most emphasis on build quality and price – these are the key driving factors with at least 6 in 10 potential customers (62% and 60% respectively selecting these options).

Location (48%), sustainable construction methods (48%) and investing in local amenities (47%) then make up the 'top 5' priority factors.

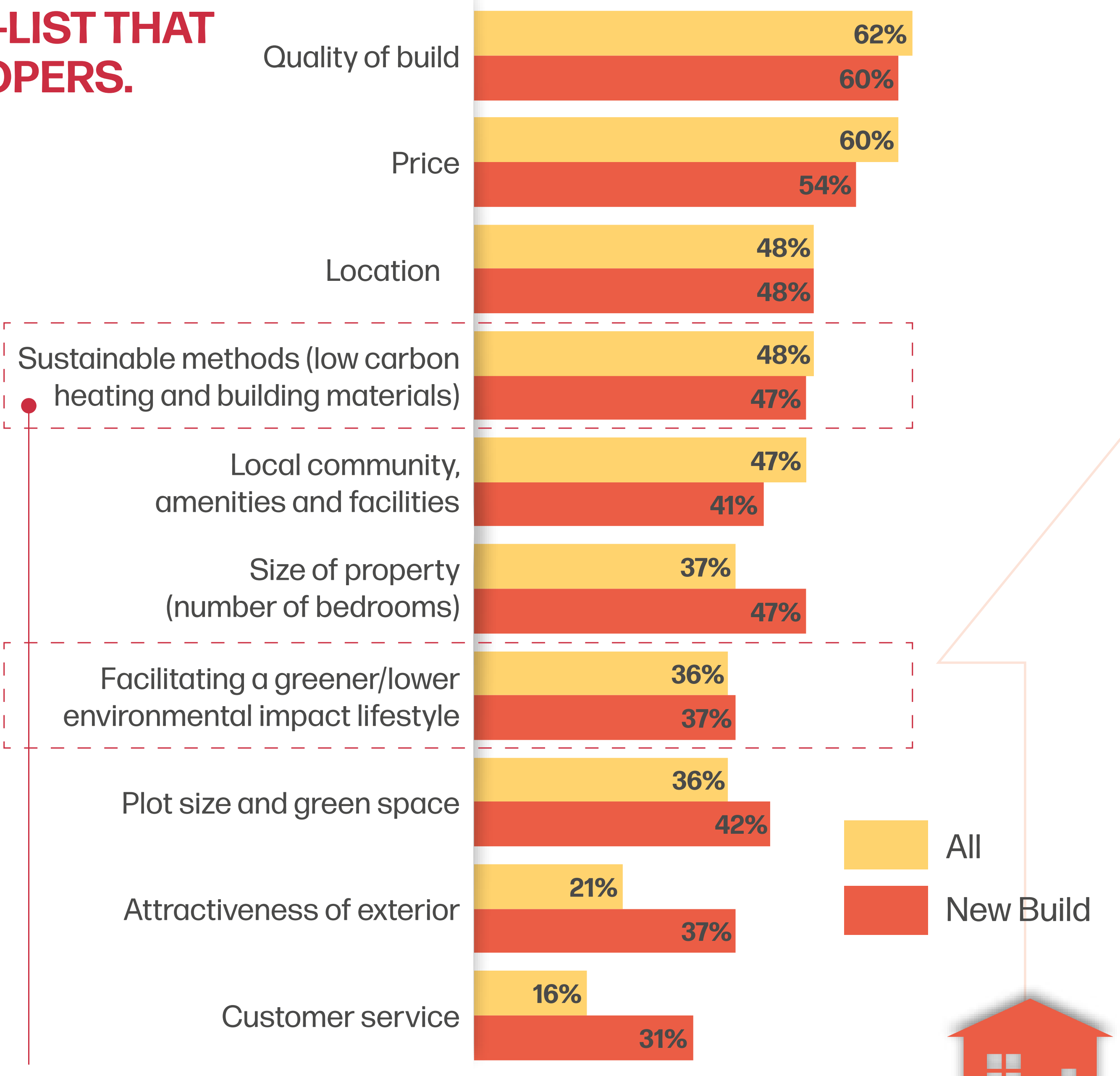
There is currently more emphasis placed on construction methods and materials, than on facilitating consumers to live a greener/lower impact lifestyle (36%).

When directly prompted, over three-quarters agree that energy efficiency and decarbonisation should be prioritised in new housing that is built (but only 40% place the highest importance on this).

Overall, the relative importance put on sustainability is higher for younger consumers who are more likely to be First Time Buyers and, to some extent, mature consumers who may Downsize. The middle-aged segment appears to be currently less enthusiastic to these messages.

SUSTAINABILITY MAKES THE 'TOP 5' WISH-LIST THAT CONSUMERS HAVE FOR HOUSING DEVELOPERS.

	Top 5
Quality of build	62%
Price	60%
Location	48%
Sustainable construction methods	48%
Local community, amenities and facilities	47%



*The relative importance of '**green**' credentials remain equally important for those in-market for new builds. Other practical considerations also become more important.*

In your view, where should housing developers place most attention when building these new homes?
Base: 920

ARE SUSTAINABLE HOMES IMPORTANT TO FUTURE HOMEBUYERS?

IMPORTANCE OF GOVERNMENT PRIORITISING ENERGY EFFICIENCY AND DECARBONISATION IN NEW HOUSING STOCK.

VERY IMPORTANT	FAIRLY IMPORTANT	NEITHER / DON'T KNOW	FAIRLY UNIMPORTANT	VERY UNIMPORTANT
40%	38%	15%	4%	3%

78%

Although only 40% of all consumers currently say it is ***very*** important, in total over three-quarters think it is of some importance.

The construction sector should note that consumers want policy makers to place even more importance on energy efficiency and decarbonisation – in fact this increases amongst those who are more in the mindset of making a purchase.

	Very important	Total importance
New build preference	45%	82%
Active in-market	48%	89%

Overall, how important or unimportant is it to you that the government prioritises energy efficiency and decarbonisation in the future UK housing stock? Base: 920, 343, 157

WHO IS DRIVING THIS DEMAND FOR SUSTAINABLE HOMES?

THE RELATIVE PLACEMENT OF 'SUSTAINABILITY' IS HIGHER FOR YOUNGER CONSUMERS WHO ARE MORE LIKELY TO BE FIRST TIME BUYERS. THERE IS ALSO APPETITE AMONGST THE MORE MATURE AUDIENCE.

FTBs (25-34 years) Base: 164	
Quality of build	60%
Sustainable construction methods	46%
Local community, amenities and facilities	43%
Location	40%
Size of property	35%
Overall importance placed (very)*	48%

Moving up (45-54 years) Base: 149	
Price	62%
Quality of build	62%
Location	43%
Size of property	39%
Sustainable construction methods	36%
Overall importance placed (very)*	35%

Downsizers (65 years +) Base: 218	
Quality of build	69%
Price	60%
Sustainable construction methods	61%
Local community, amenities and facilities	61%
Location	59%
Overall importance placed (very)*	44%

In your view, where should housing developers place most attention when building these new homes?

** Overall, how important or unimportant is it to you that the government prioritises energy efficiency and decarbonisation in the future UK housing stock?*

FINDINGS

THE NEW HOME BUYERS' WISHLIST

Consumers are most likely to place energy efficiency measures such as better insultation and triple glazing – 58% and 48% respectively – in their 'wish list' for future housing.

Next, solar PV panels rank closely behind with over one third of consumers saying this is also an important technology to prioritise.

Although they rank lower on the overall list with general consumers, emerging technology such as energy management systems, UFH and battery storage are of growing importance to those actively in-market.

Just 1 in 6 consumers state that low temperature systems, such as Air Source Heat Pumps, are an important area to focus on. Even more work needs to be done to improve the profile of this key solution to carbon-reduction in the housing stock.

In fact, whilst 36% say they would be confident buying a future home with such technology only slightly less (32%) say they would be nervous. There are some clear age differences here which should be considered in education campaigns.

FINDINGS

WILL CONSUMERS PAY MORE FOR SUSTAINABLE HOMES?

Current estimates vary but implementing Future Home Standards (FHS) will increase the average cost of construction by at least £5,000 per property.

Navigating these price increases with consumers whilst also 'selling' the advantages of lower energy bills is a key challenge for house builders going forwards.

Our results show that although 50% of all consumers currently expect these costs to be absorbed by the sector, there is a growing willingness amongst those more active in the new build market to pay more.

One third of those who lean towards new builds and 45% of those actively in-market state they would be prepared to pay significantly or slightly more for a sustainable future home.

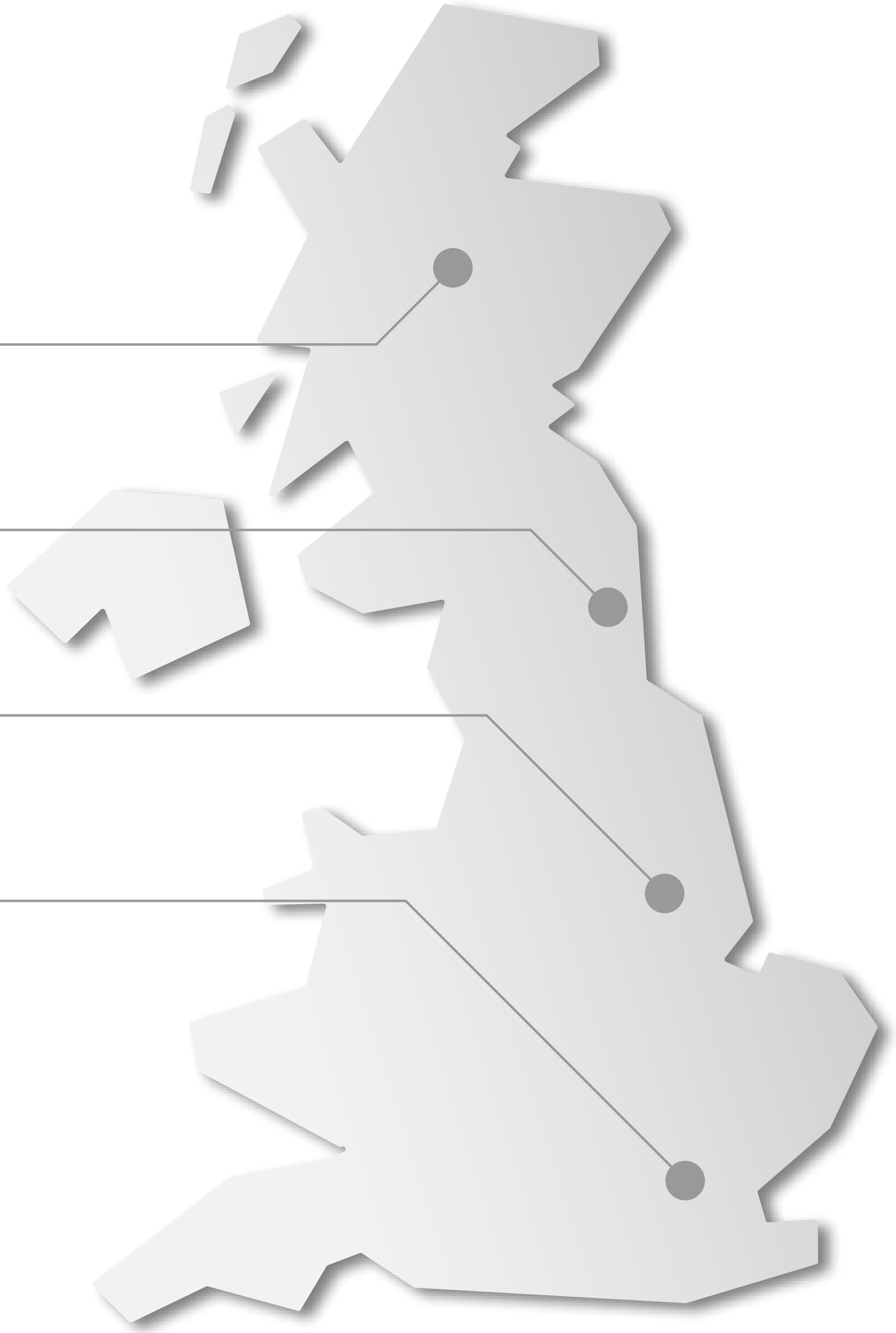
Our analysis shows that the key driver will be younger FTBs who are already 'ahead of the curve' in terms of recognising the challenge and placing importance on green solutions in housing.

FINDINGS

WHERE ARE THE ECO CONSCIOUS HOME BUYERS?

WHERE ARE THE HOTSPOTS ACROSS THE COUNTRY?

Scotland	83%
North East	83%
East	86%
Greater London	82%



	Very Important	Total Importance
North East	50%	83%
North West	46%	78%
Yorkshire & the Humber	39%	70%
East Midlands	28%	77%
West Midlands	37%	75%
East of England	44%	86%
Greater London	47%	82%
South East	33%	79%
South West	32%	65%
Wales	51%	78%
Scotland	40%	83%

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Overall, how important or unimportant is it to you that the government prioritises energy efficiency and decarbonisation in the future UK housing stock?
Base: (Lowest) Wales 44 ~ (Highest) South East 118

FINDINGS

WHICH 'GREEN TECH' IS TOP FOR NEW HOME BUYERS?

THE AVERAGE CONSUMER THINKS ABOUT ENERGY EFFICIENCY FOREMOST, RENEWABLE HEATING SOLUTIONS ARE A CLOSE SECOND.

INCREASING RECOGNITION TO CONSUMERS

MOST SELECTED FEATURE

- TRIPLE GLAZING
- LOFT AND WALL INSULATION*

ENERGY EFFICIENCY MEASURES
(29%)

SECOND MOST POPULAR FEATURES

- PV / SOLAR
- AIR SOURCE HEAT PUMP

RENEWABLE ENERGY TECHNOLOGIES
(25%)

MID-LOW RANKING

- SMART ENERGY SYSTEM: ENERGY MANAGEMENT / SMART HOME *(9%)*
- GREEN SPACES: NATURE INTERVENTIONS *(7%)*
- UNDERFLOOR HEATING: UNDERFLOOR HEATING *(5%)*
- WATER EFFICIENCY: WATER EFFICIENT SHOWERS, TAPS ETC *(5%)*

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?

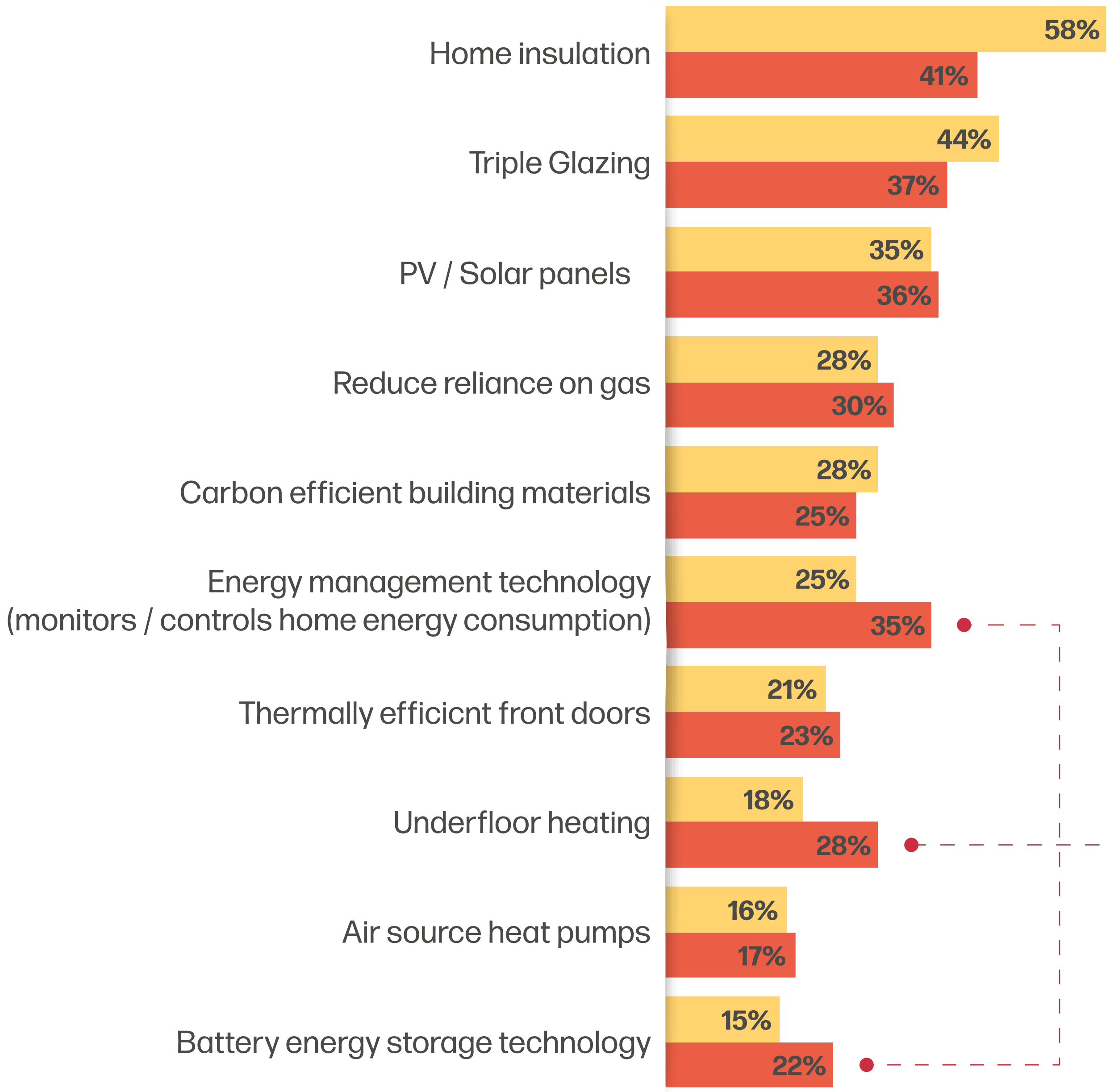
Which of the following features or technologies would you most like to see incorporated into future housing in the UK? Base: 920

FINDINGS

WHAT DO NEW HOME BUYERS EXPECT THE FHS TO PRIORITISE?

IN RELATION TO POLICY, CONSUMERS SAY THAT INSULATION AND TRIPLE GLAZING SHOULD BE THE TOP PRIORITIES FOR BUILDERS.

	Top 1 Ranking	Top 3 Ranking
Home Insulation	26%	58%
Triple Glazing	17%	44%
Solar / PV	13%	35%
Reduce Gas Dependency	10%	28%
Carbon Efficiency	95%	28%



Those who are actively in-market for property have more appetite for new tech (controls, UFH, energy mgt) but ASHP is not yet cutting through.

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In your opinion, what should be the most important areas to focus on when delivering (If region=Eng/Wales) the Future Homes Standard in England and Wales? (If region=Scot) the New Build Heat Standard (NBHS) in Scotland? Base: 743

FINDINGS

WHICH CONSUMERS ARE LEFT COLD WHEN IT COMES TO HEAT PUMPS?

CONSUMER CONFIDENCE IS EXTREMELY POLARISED WITH REGARDS TO MOVING INTO A NEW HOME WITH LOW TEMPERATURE HEATING.

VERY CONFIDENT	FAIRLY CONFIDENT	NEITHER / DON'T KNOW	FAIRLY NERVOUS	VERY NERVOUS
13%	23%	32%	18%	13%

36%

Although only 13% are very confident, almost 4 in 10 display degrees of confidence to potentially embrace this new technology.

	Very confident	Total confidence
New build preference	19%	50%
Active in-market	29%	56%
Aged 25-34	30%	59%

32%

One-third say they are nervous about this new tech.

Dominated by younger consumers, those active in the market and those with a new build preference show most confidence to potentially embracing this new technology.

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Based on your current knowledge, how confident would you be moving to a future home with an air source heat pump or other low temperature heating system (rather than a gas boiler)? Base: 743.

FINDINGS

WHO IS WARM TO SUSTAINABLE HEATING SOLUTIONS?

THE STRENGTH OF CONFIDENCE TO LIVE WITH THESE TECHNOLOGIES BY AGE GROUPING, IS CLEARLY EVIDENCED BELOW. THE DIFFERENCES ARE PARTICULARLY NOTICEABLE BETWEEN FTBs AND THE MORE MATURE AUDIENCE.

	FTBs (25-34 yr olds) Base: 111	Moving up (45-54 years) Base: 129	Downsizers (65 years +) Base: 159
Very confident	30%	9%	6%
Fairly confident	30%	21%	17%
Neither/ DK	29%	32%	25%
Fairly nervous	10%	21%	28%
Very nervous	2%	14%	23%

Based on your current knowledge, how confident would you be moving to a future home with an air source heat pump or other low temperature heating system (rather than a gas boiler)? Base: 743.

DO CONSUMERS EXPECT TO ACTUALLY PAY MORE FOR SUSTAINABLE HOMES?

WHILE THE MAJORITY (ONE HALF) EXPECT THIS TO BE 'STANDARD' IN A NEW HOME, OVER ONE QUARTER WOULD EXPECT TO PAY MORE FOR A SUSTAINABLE HOME BECAUSE THEY UNDERSTAND THE BENEFITS.

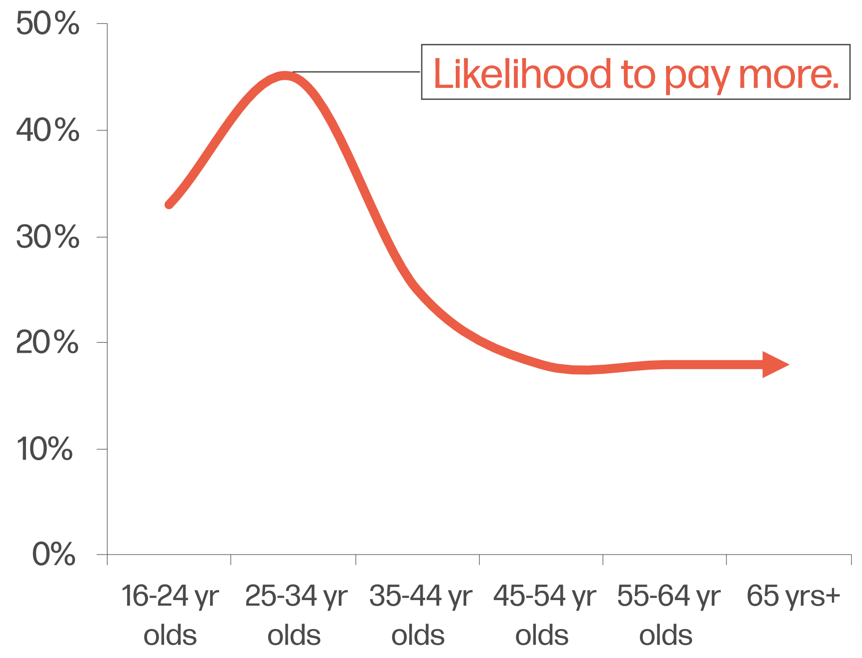
PAY SIGNIFICANTLY MORE	PAY SLIGHTLY MORE	WOULD EXPECT TO BE STANDARD IN NEW HOME	PAY SLIGHTLY LESS	PAY SIGNIFICANTLY LESS	N/A
6%	20%	50%	3%	4%	18%

One quarter willing to pay more. **26%**

Although only 13% are very confident, almost 4 in 10 display degrees of confidence to potentially embrace this new technology.

	Significantly more	Sig/ Slightly more
New build preference	15%	34%
Active in-market	17%	45%

We can clearly see the propensity to purchase being stronger with the younger age groups here, particularly the 25-34 year olds (45%).

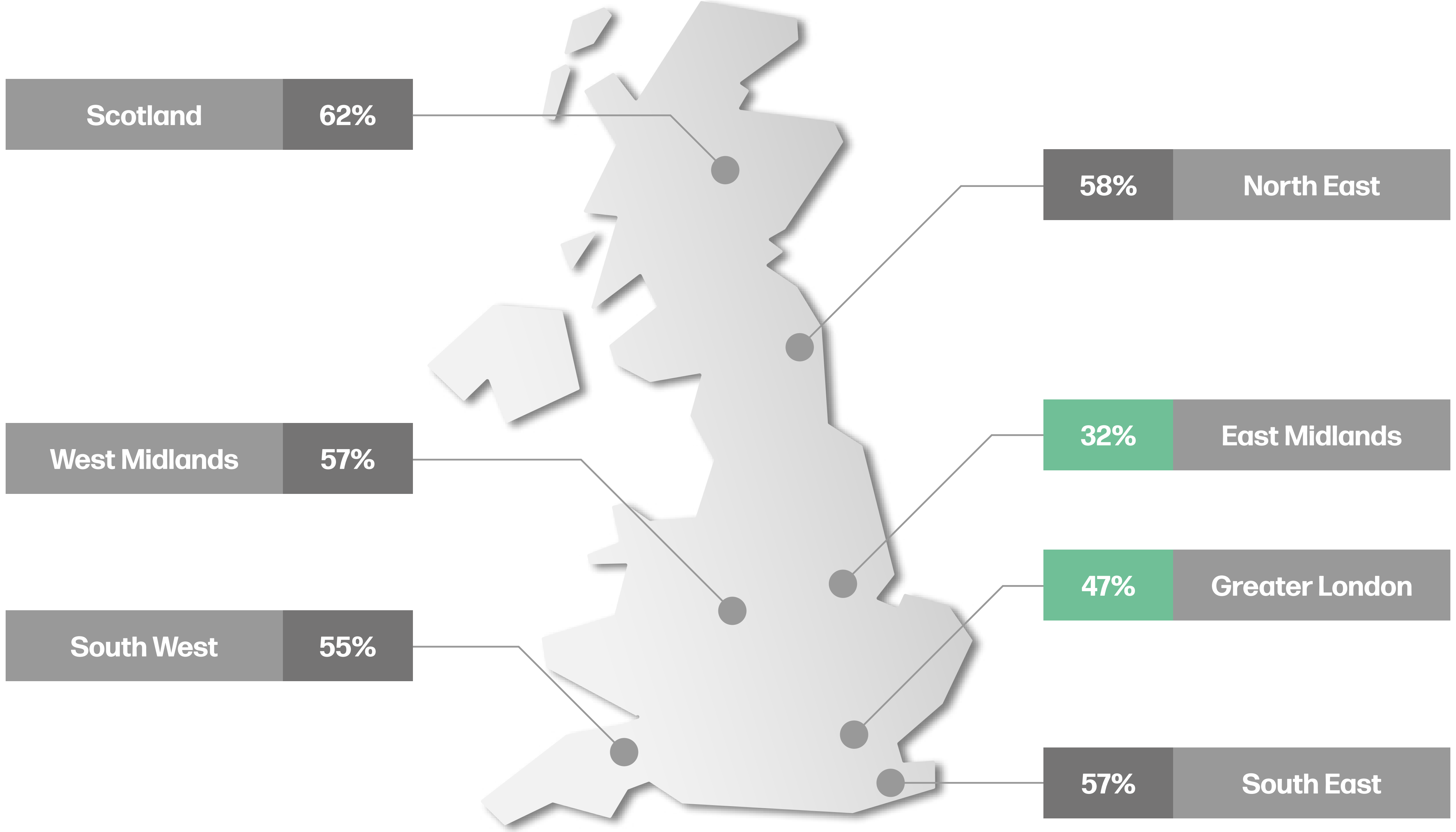


Overall, would the introduction of more sustainable homes, built in accordance with the Future Homes Standard, make you more or less likely to pay more for a new home? Base: 743.

FINDINGS

REGIONAL VARIATIONS IN WILLINGNESS TO PAY

OUR ANALYSIS SUGGESTS THAT CONSUMERS IN CERTAIN REGIONS HAVE A HIGHER PROPENSITY TO PAY THAN OTHERS. THIS SUGGESTS THAT HOUSEBUILDERS NEED TO ADOPT DIFFERENT MARKETING AND SALES STRATEGIES DEPENDING ON LOCATION.



	Pay more	Expect as standard	Pay less
North East	26%	58%	10%
North West	27%	45%	8%
Yorkshire & the Humber	27%	37%	9%
East Midlands	32%	55%	3%
West Midlands	18%	57%	6%
East of England	19%	63%	0%
Greater London	47%	31%	7%
South East	17%	57%	6%
South West	14%	55%	8%
Wales	22%	52%	6%
Scotland	7%	62%	11%

?

Overall, would the introduction of more sustainable homes, built in accordance with the Future Homes Standard, make you more or less likely to pay more for a new home? Base: 743.

MEETING THE DEMANDS OF POTENTIAL HOMEBUYERS

Here we highlight trailblazing housebuilders of different sizes, both perfectly positioned to meet the requirements of the FHS and take advantage of the growing consumer demand for sustainable homes. Taylor Wimpey's future homes trial aims to demonstrate how the industry can deliver homes that are compliant with the Future Homes Standard's (FHS) target to deliver homes which produce 75-80% less carbon emissions than those built under the 2013 building regulations.

Trialing our Homes of the Future

"The launch of our zero carbon ready homes at Sudbury marks an important milestone in helping us identify the best ways to reduce the energy use of our homes as well as identifying the challenges that will need to be overcome to do so at scale. This is a critical step in our journey to ensure we deliver on the UK's net zero ambitions as well as deliver the new homes the country desperately needs. The introduction of the Future Homes Standard and the UK's ambition to be net zero carbon by 2050 requires big changes across the economy, including to our homes and developments. We have set out our Net Zero roadmap, which will ensure Taylor Wimpey reaches net zero five years ahead of the government's target. We are proud to be collaborating with our subcontractors and supply chain partners through the full lifecycle of this trial development - from concept to customer experience - to create a sustainable blueprint for delivering customer-focused, zero carbon ready homes that are deliverable at scale."

Jennie Daly
CEO, Taylor Wimpey

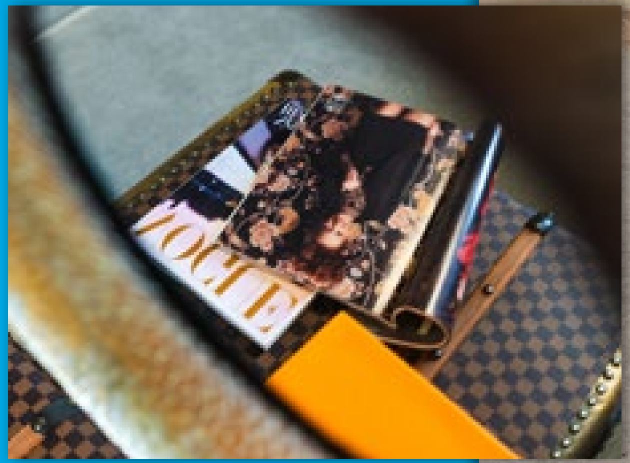
MEETING THE DEMANDS OF POTENTIAL HOMEBUYERS

As the housing sector awaits the Future Home Standards building regulations requirements, the aim of Walton Homes is to stay ahead of the curve.

WALTON HOMES

"In working to meet or exceed the government's targets we have developed a prototype cleaner, greener home. Gathering real time data from a typical Walton Home' owner, and their neighbours state-of-the art eco-alternative. Our data, together with the insightful Sustainable Housing Report is helping to shape our future sustainability strategy. As we explore how best to improve energy and ecological ratings for our buyers our sustainability experts are testing a wide variety of green initiatives including wider cavities, underfloor heating and energy management systems, as well as solar panels on roofs and battery storage solutions."

Amy Summerton
LABC Developer of the Year 2024 Walton Homes Director.



METHODOLOGY

A LARGE, ROBUST CONSUMER SURVEY.

1,663 online interviews

Nationally representative by age, gender, social class, and region.

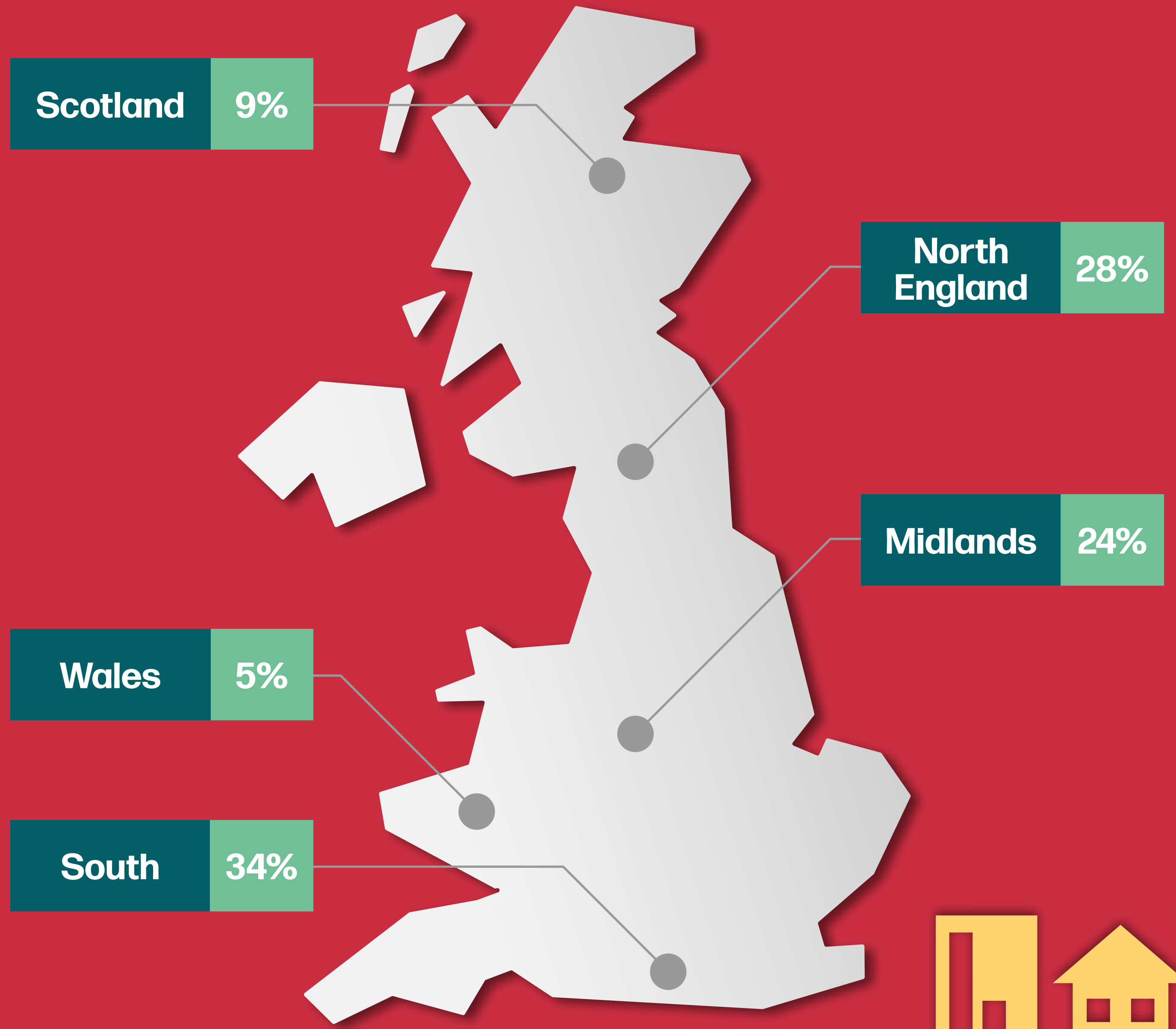
In conjunction with our partners at MEL Research, data were collected via online Omnibus between 17 Oct – 12 Nov 2024.

ALLOWING A DEEP DIVE INTO DIFFERENT HOME BUYERS.

Conducting such a large consultation allows us to focus in on some key demographic groups and improve our understanding of dynamics in the housing market.

Mortgage holders	Own home outright	Social renters	Private renters	Other
26%	40%	13%	14%	6%

REPRESENTATIVE OF GREAT BRITAIN.



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ASK THE EXPERTS

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