

European Housing Trend Report



2024

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Introduction: Europe's Housing Market at a Crossroads

Europe's housing market is undergoing profound changes, influenced by economic turbulence following the global pandemic, ongoing international challenges, and the increasing cost of living. Following a year in which the continent experienced high inflation and rising interest rates after a series of rate hikes by the European Central Bank¹, households across the continent began reassessing their housing needs in 2024, balancing financial pressures with aspirations for better living conditions. The RE/MAX European Housing Trend Report 2024 offers a comprehensive look into these shifts, exploring how evolving preferences, affordability concerns, and sustainability are shaping the future of housing.

Insights from across the continent

Drawing on insights from a consumer survey of thousands of participants across Europe, this report illuminates the various considerations facing today's homeowners and renters. It highlights widespread financial challenges, as rising housing costs force many to allocate a significant portion of their income to cover basic living expenses. The report also delves into the various financial decisions that individuals and families are taking, such as increased reliance on credit and borrowing, to navigate their changing financial circumstances.

Environmental sustainability, while gaining traction in public discourse, remains a secondary consideration for many due to the high costs associated with eco-friendly home improvements. The report explores this new compromise between the desire for sustainable living and the financial realities that prevent the broad adoption of such measures.

Today's housing trends

Among the financial and environmental shifts of recent times, satisfaction with housing varies greatly across Europe. While some countries enjoy high levels of contentment, others - particularly those with higher costs and lower-quality housing - report dissatisfaction. This report provides a detailed analysis of these satisfaction levels, linking them to factors such as homeownership, property quality, and specific housing challenges.

In addition to satisfaction, the report examines the growing trend of secondary homeownership, which, for many, represents a combination of leisure, retirement planning, and financial investment. It also highlights the aspirations of those who do not currently own a secondary property but hope to do so in the future, reflecting the enduring appeal of property ownership amidst economic pressures.

The priorities of Europeans when choosing a home are also changing, with outdoor space and energy efficiency becoming increasingly important in the post-pandemic world. This report details the motivations behind these new priorities, which are influencing buyer and seller behaviours, alongside more traditional considerations like affordability, housing quality and location.

Lastly, the report examines the long-standing tradition of passing down property to the next generation, highlighting the significant role that homeownership plays in ensuring financial security and stability for families across Europe.

Challenges and opportunities ahead

As we navigate these transformative times, the RE/MAX European Housing Trend Report 2024 provides invaluable insights into the current state and future direction of the European housing market. It serves as a vital resource for policymakers, real estate professionals, and consumers alike, offering greater understanding into Europe's markets and their residents as the continent looks to address challenges and capitalise on the opportunities that lie ahead.

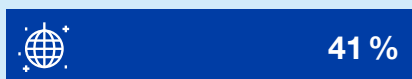


Satisfaction with housing varies greatly across Europe

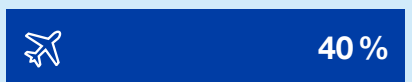
¹ <https://www.euronews.com/business/2024/06/04/ecb-expected-to-cut-interest-rates-this-week-what-you-need-to-know>

Does Navigating Housing Costs mean Navigating New Territory?

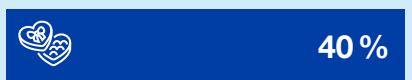
Spending reductions (in order to afford mortgage payments)



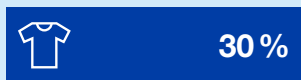
Going out



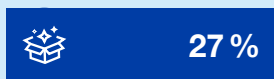
Holidays



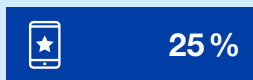
Luxury consumable items



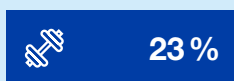
Clothes and shoes



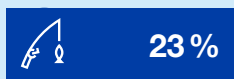
Subscription services



Electronics



Classes / gym



Hobby items / sports goods



Everyday items



I haven't ever had to change my spending in order to afford my mortgage

For many Europeans, housing costs represent their biggest outgoing. On average, adults allocate nearly two-fifths (38%) of their monthly household income to covering rent or mortgage payments and utility bills, underscoring just how much housing costs expend household budgets. Respondents in Slovenia (43%) and Portugal (42%) are among the most expensive countries when it comes to housing costs, where respondents spend even more. Switzerland (30%), in contrast, enjoys a relatively lower burden, reflecting a more balanced cost of living.

Property prices on the rise

The challenge of affordability is further compounded by the rising cost of properties, which remains the primary barrier for those in Europe who wish to move but cannot. A substantial 64% of would-be movers are held back by the high cost of housing, particularly in Croatia (76%) and Malta (75%). Additionally, saving for a deposit is a difficulty cited by 40% of respondents - especially in the Czech Republic (60%) and Greece (58%)—adding another layer of complexity to getting on the property ladder.

Many reining in spending to afford to buy

But with the dream of homeownership remaining strong across the continent, as Europeans seek a place of their own and recognise the investment opportunity, many residents are adapting and changing their lifestyles to better manage their housing expenses. A notable 41% of adults have cut back on social activities, while 40% have reduced spending on holidays and luxury items. Everyday necessities, like food, remain less impacted, however 16% of people have adjusted their spending habits in this area as well, with the figure rising to 26% in Austria and Finland. These sorts of behaviour changes may soon

be on the rise, too, as nearly half (48%) of adults throughout Europe anticipate further increases in their spending on housing costs over the next 12 months.

Buyers adjust property 'wish lists' amidst higher costs

Affordability is clearly a crucial consideration for many, and in response to rising costs, a significant portion of Europeans are considering drastic changes to their living situations to manage expenses. When asked where they might move for a more affordable life, 32% of adults indicated they would be willing to relocate to a smaller city or town to reduce their housing costs. Additionally, 24% expressed a readiness to move abroad in search of a more affordable lifestyle, highlighting the growing willingness to explore international options as housing becomes increasingly unattainable in certain regions. However, with 18% considering downsizing within their current area, and 21% not open to moving at all, the trend reflects a fairly even split between those willing to relocate and those preferring to stay in their current location.

This shift in mindset underscores the profound impact that rising costs are having on the decisions of where to buy, and whether to sell. For many, it is no longer just about finding the ideal home in a preferred location - rather it's about securing a financially sustainable living arrangement, whether that means downsizing, moving to a less expensive area, or even crossing borders to find a better balance between cost and quality of life.

Respondents spend nearly 40% of their monthly income on rent, mortgage, and utility bills.



Balancing Act: Comfort and Strain in Housing Affordability

When it comes to the affordability of their current housing situation, European residents offer a mixed picture – and indeed a notable divide. Over two-fifths (44%) of respondents report feeling fairly or very comfortable with their housing costs, reflecting a sense of stability for a significant portion of the European population. However, this comfort is not universal. 37% describe themselves as ‘coping’, noting that they can afford their housing costs but sometimes money is tight, while 19% admit they are either struggling or really struggling to meet their housing costs.

Vast differences in levels of comfort with housing costs

The contrast in comfort levels across different countries highlights the diverse financial realities within Europe. Respondents of the Netherlands stand out, with an impressive 75% of respondents feeling comfortable with their housing costs. Similarly, over half the residents of the UK (53%) and Portugal (53%) – in spite of their higher housing costs – also report higher levels of financial comfort. On the other end of the spectrum, Turkey presents a stark contrast,

with 32% of respondents saying they are struggling – likely a reflection of the country’s high inflation and economic volatility in recent years.²

This divide between comfort and struggle underscores the varied experiences of European residents and the pressures that many face as housing costs continue to rise. While some are able to maintain financial security, a significant portion of the population is feeling the strain, with housing affordability becoming a growing concern in certain regions. While interest rates and inflation have started to decline, economic pressures persist as both inflation and interest rates remain higher than populations have become accustomed to in recent years. As a result, housing affordability is high on the agenda for policymakers and buyers and sellers alike.

Cost of Living: The Use of Credit and Borrowing



In this period of a higher cost of living, the majority (85%) aren’t needing to borrow money to cover their housing costs, thanks to either a situation of strong financial stability, or adjustments made to their spending habits or living situations. Residents in Switzerland (92%), the Netherlands (90%) and France (89%) seem to be the most financially independent when it comes to their housing costs, as they are the least likely to have used any form of borrowing or credit to cover their housing costs.

However, in the past year, 15% of adults have relied on some form of borrowing to cover their housing costs expenses (not including any existing mortgages), and have turned to credit cards, loans, and borrowing from friends and family to manage their expenses. This trend is particularly pronounced in Turkey (32%), Bulgaria (22%), and Romania (20%), where the reliance on borrowing is higher than in other regions.

Credit cards are the most common form of borrowing, used by 34% of those who

have needed financial assistance for their housing costs, particularly in Turkey (48%) and the UK (47%). Borrowing from friends and family follows closely behind at 27%. Additionally, 25% of respondents have used bank overdrafts, and 23% have taken out unsecured bank loans to cover housing costs. This trend of reliance on external financial support exists for the minority on the continent, but is nonetheless indicative of the broader affordability challenges faced by many households across Europe.

15% of respondents have turned to credit cards, loans, and borrowing from loved ones to cover housing costs beyond their mortgage.

Sustainability Measures: Are Green Upgrades Getting the Green Light?

Despite the growing awareness of environmental issues, and the potential long-term savings that could be made with more efficient and temperature-controlled homes, the majority of homeowners are unlikely to install eco-friendly measures in their homes due to the high costs involved. While 27% of Europeans say they are likely to invest in solar panels, this number varies significantly across countries. It is clear that those in sunnier nations, like Turkey (52%), have a much higher interest in solar energy, whereas those in places with less sunlight, such as the UK (17%) and Finland (17%), are far less likely to install solar panels.

Similarly, the installation of other sustainable systems, like heat pumps or rainwater capture devices, remains low. The expense of installation is cited by many as a significant deterrent, with over half (56%) saying they would be more inclined to install these measures if they were more affordable. In Croatia (68%), this sentiment is particularly strong.

Government incentives hold the key to sustainable homes

Increased government support could have substantial influence on the uptake of sustainability measures; 48% of adults report that government incentives would motivate them to install energy-efficient measures. Meanwhile, a considerable proportion (21%) say they'd be motivated to improve their home's sustainability if they knew the resale value would increase. One in 10 (11%), however, report being resistant to bringing energy efficiency or sustainability measures into their homes altogether, with this figure reaching 26% in the Czech Republic.

Energy costs challenge path to greener homes

While the desire for energy-efficient homes and sustainable living is growing, affordability remains a major barrier to widespread adoption of eco-friendly measures. For many Europeans,

the cost of energy itself is already a significant challenge. Although 43% of respondents say they can comfortably afford their energy costs, this figure varies widely across different regions. In the Netherlands, for example, energy affordability appears relatively stable, with 75% of residents feeling financially secure regarding their energy expenses.


However, the picture is far less optimistic in other parts of Europe, where energy costs are placing significant strain on households. A concerning 18% of respondents report struggling or really struggling to meet their energy bills, with this sentiment particularly prevalent in Greece, where 36% of residents are facing severe difficulties managing their energy expenses. These financial pressures further complicate the adoption of sustainable home improvements, as households already grappling with energy costs are less likely to invest in expensive eco-measures like solar panels or heat pumps.



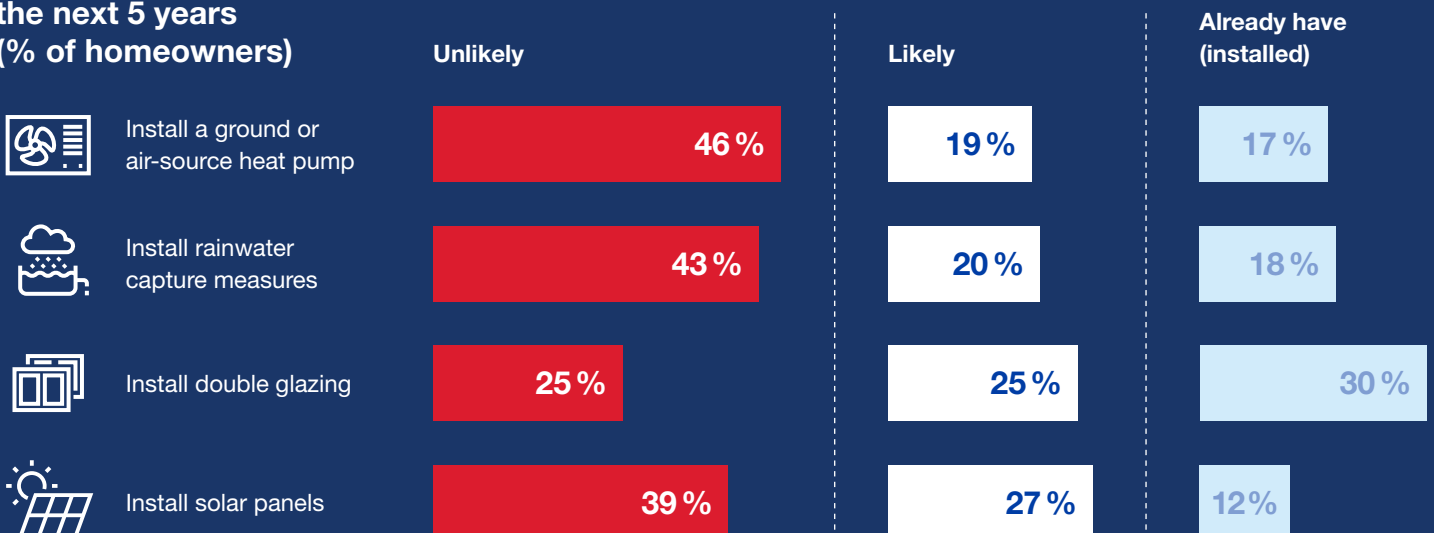
This disparity underscores the financial reality that, for many, the priority remains immediate affordability rather than long-term sustainability. As energy costs rise in certain regions, the need for external support—whether through government subsidies or industry incentives—will be crucial to making sustainable living both accessible and practical for the broader population.

While a good proportion of Europeans are yet to be convinced on making their homes greener, there is a growing interest in smart home technology, which does, to some extent, offer a cost-effective way to improve energy efficiency. Currently, 57% of adults use some form of smart home technology, ranging from basic devices like smart bulbs to more comprehensive systems that integrate lighting, heating, and security. However, the extent of usage varies widely, with only 7% of homes fully-integrated with smart technology, and 29% using the technology minimally.

18% of respondents are struggling to keep up with their energy bills.



How likely or unlikely are you to do the following in the next 5 years (% of homeowners)



Satisfaction Levels, Affordability, and the Growing Desire to Relocate in Europe

Despite the widespread affordability concerns, satisfaction with housing remains high in some parts of Europe. The Netherlands (84%) and Romania (84%) stand out, with respondents in these countries expressing notable contentment with their current housing situation. This level of satisfaction is well above the European average of 76% and is closely tied to the strong homeownership rates and the quality of housing available in these regions.

However, not all countries share this level of satisfaction. Ireland, for instance, has the highest proportion of dissatisfied residents at 18% - 8 percentage points above the European average of 10%. Throughout Europe, dissatisfaction is particularly pronounced among renters and those in less secure housing arrangements. In contrast, those who own their home outright (84%) or with a mortgage or loan (83%) report significantly higher satisfaction levels, highlighting the link between homeownership and housing contentment.

Lack of space causing housing dissatisfaction


Dissatisfaction often stems from specific housing issues, with 37% of dissatisfied residents citing the need for more space as a key concern. This is especially acute in Poland, where 58% of unhappy residents feel their homes are too small. Cost is another major issue, with 33% of dissatisfied individuals feeling their property is too expensive, a sentiment that rises to 53% in Malta, 48% in Ireland, and 48% in Finland. Additionally, 49% of dissatisfied residents in Portugal report problems with dampness or mould, while 22% of those dissatisfied in the Netherlands experience issues with hygiene and pests.

Along with ownership, the data reveals that satisfaction rates are also closely linked to the quality of housing. Renters who are in areas with higher costs or lower-quality housing, are more likely to express dissatisfaction. This trend underscores the importance of ownership and access to quality housing in driving overall contentment with living conditions.

Most are open-minded about relocation

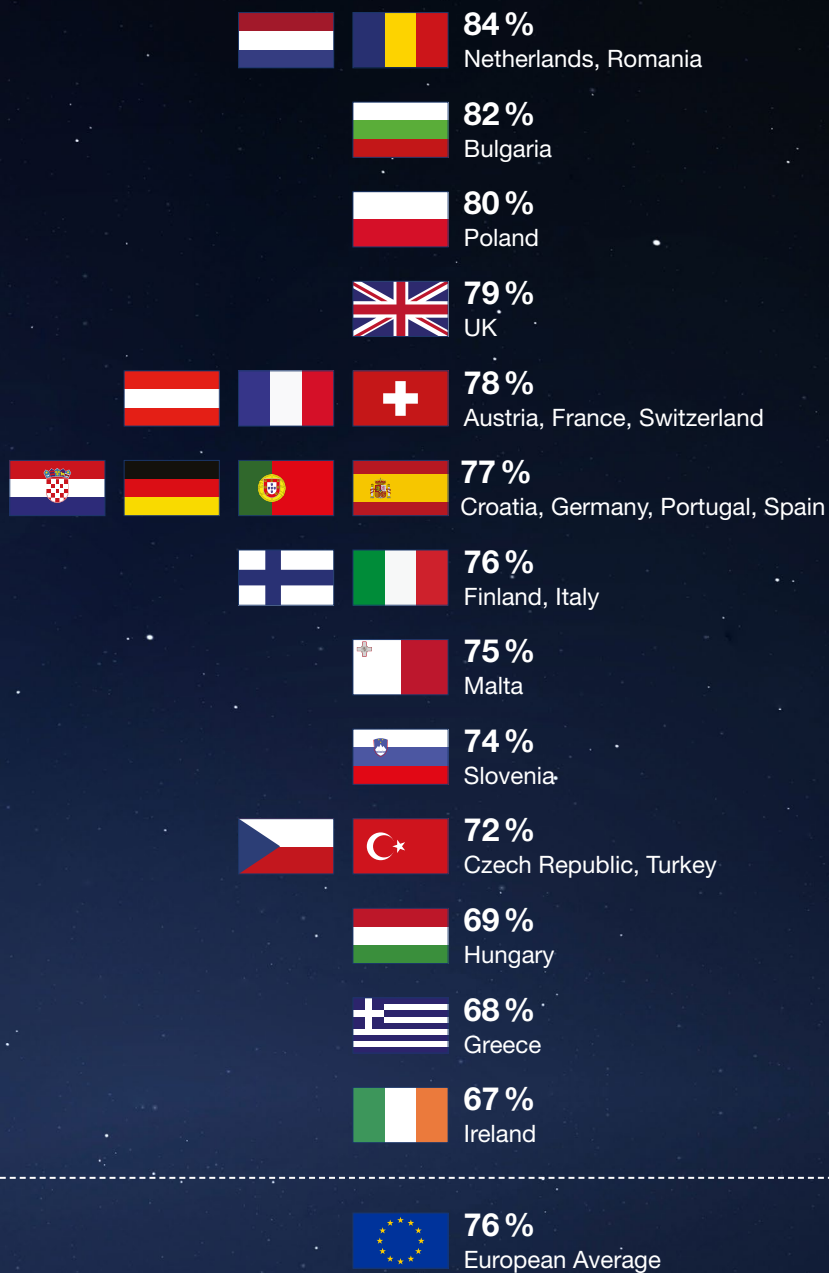
While many Europeans express satisfaction with their current housing, a significant number remain open to the idea of relocating. Over half of those surveyed (55%) said they would consider moving if the opportunity arose. This sentiment is particularly strong in countries such as Turkey (67%), Portugal (62%), and Slovenia (61%), where the desire for change may stem from the pursuit of better living standards, more space, or improved affordability.

Interestingly, the inclination to move is most pronounced among those living in large cities, where 63% of residents are contemplating relocation. This stands in contrast to those in more rural or isolated settings, where only 43% are considering a move. Even in regions with high satisfaction, such as the Netherlands and Romania, the possibility of relocating reflects the dynamic and evolving nature of housing preferences across Europe. However, when considering which type of area people would like to move to, there are no clear trends, as preferences vary significantly across different parts of Europe.



Dutch and Romanian respondents are the most satisfied with their housing situation, while Irish respondents are the least content.

Percentage of Europeans Net Satisfied With Current Living Situation

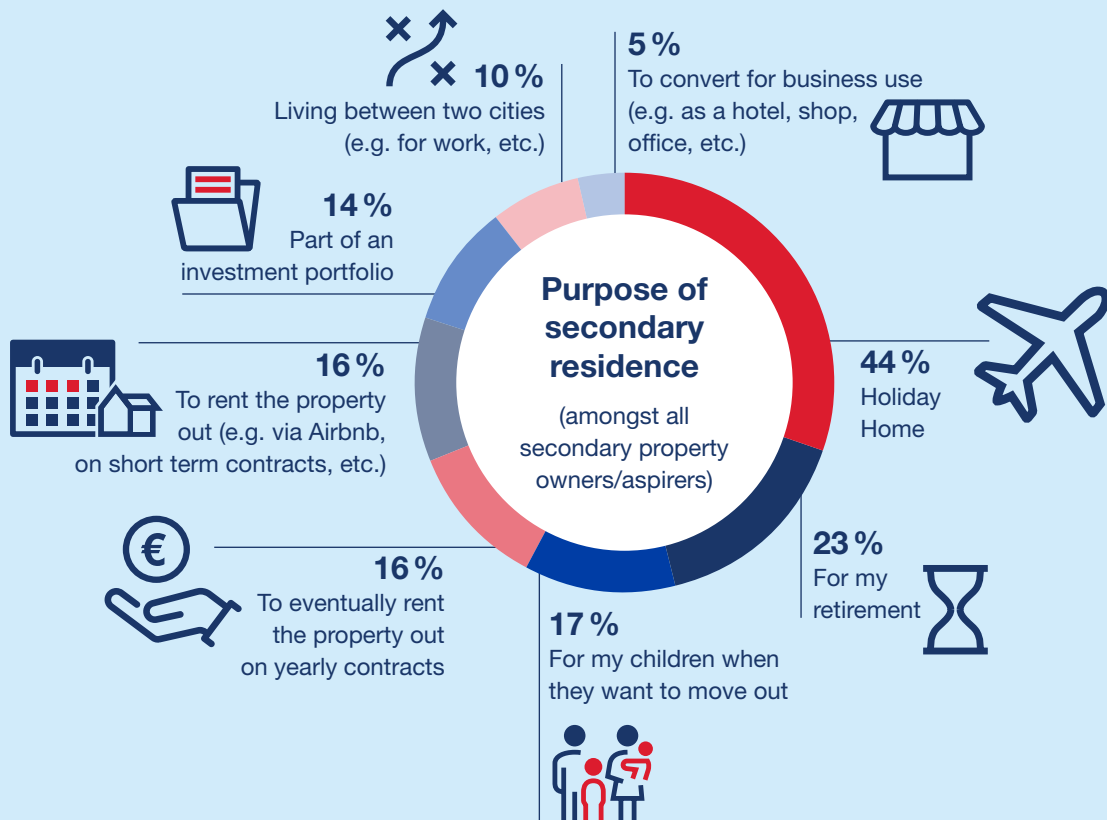


The Dream of a Second Home

69%³ of Europeans own the home they live in – and a quarter of these homeowners own a secondary residence. These secondary properties are primarily used for holidaying or retirement, and this trend is most pronounced in Bulgaria (46%), where nearly half of homeowners own a second home. In contrast, the UK (10%) has one of the lowest rates of secondary homeownership, with 71% saying they are unlikely to ever own one – a reflection, perhaps, of the nation’s higher property prices and cost of living. For those who own a second property, the appeal tends to be more one of leisure than investment. Nearly half

(44%) use these homes as holiday retreats, and a quarter (23%) view them as future retirement spots. Interestingly, the location of these secondary residences varies, with 39% of owners having their second home in the same country, while those in colder climates, like Ireland (25%) and the UK (21%), are more likely to have a secondary residence abroad. Whether used for vacations, retirement, or as a long-term financial investment, secondary homeownership is not just a current trend, but an aspirational goal for many. More than a tenth (13%) of all homeowners say that while they do not currently own a secondary property,

they are likely to own one in the future. This aspiration is particularly strong in Turkey (23%), where nearly a quarter of the home-owning population hopes to acquire a second home. The appeal of secondary residences represents an investment in lifestyle, financial comfort and leisure. And, in spite of a more challenging economic climate, ambition to secure this dream remains strong for many on the continent, which will see secondary residences continue to play a significant role in the real estate markets of Europe.



³ [https://ec.europa.eu/eurostat/web/interactive-publications/housing-2023#:~:text=Over%20two%2Dthirds%20of%20people.and%20Denmark%20\(40%25\)%20followed.](https://ec.europa.eu/eurostat/web/interactive-publications/housing-2023#:~:text=Over%20two%2Dthirds%20of%20people.and%20Denmark%20(40%25)%20followed.)



Country	Percentage of respondents who own at least one property
Romania	85%
Croatia	83%
Bulgaria	80%
UK	75%
Hungary	75%
Italy	72%
Poland	71%
Turkey	70%
Spain	68%
Portugal	66%
Slovenia	65%
Greece	64%
France	61%
Czech Republic	59%
Netherlands	59%
Ireland	53%
Austria	48%
Finland	47%
Malta	46%
Germany	34%
Switzerland	30%

Country	Percentage of homeowners who own a second property
Bulgaria	46%
Greece	39%
Croatia	37%
Slovenia	35%
Turkey	31%
Romania	30%
Italy	26%
Finland	26%
Spain	25%
Czech Republic	24%
Austria	23%
Portugal	21%
Malta	19%
Switzerland	17%
Hungary	17%
Poland	17%
UK	15%
Germany	14%
France	11%
Ireland	11%
Netherlands	8%



One in four European homeowners surveyed owns a second residence, often for holidaying or retirement.

Priorities in Home Selection: Space and Energy Efficiency

When choosing a home, Europeans prioritise outdoor space and low energy consumption above all else, despite the low desire to invest in sustainability measures. The Covid-19 pandemic and the ongoing energy crisis have shifted these factors to the forefront of housing decisions. For 44% of respondents, access to outdoor space is crucial, especially in Germany (54%) and Italy (52%), where this feature is highly valued. Energy efficiency is another top priority, especially in Hungary (54%), where over half of the population considers it essential.

Interestingly, while affordability and health are deemed more important than location by many, good transport links and proximity to friends and family are less critical. Only 32% of respondents believe transport is more important than location,

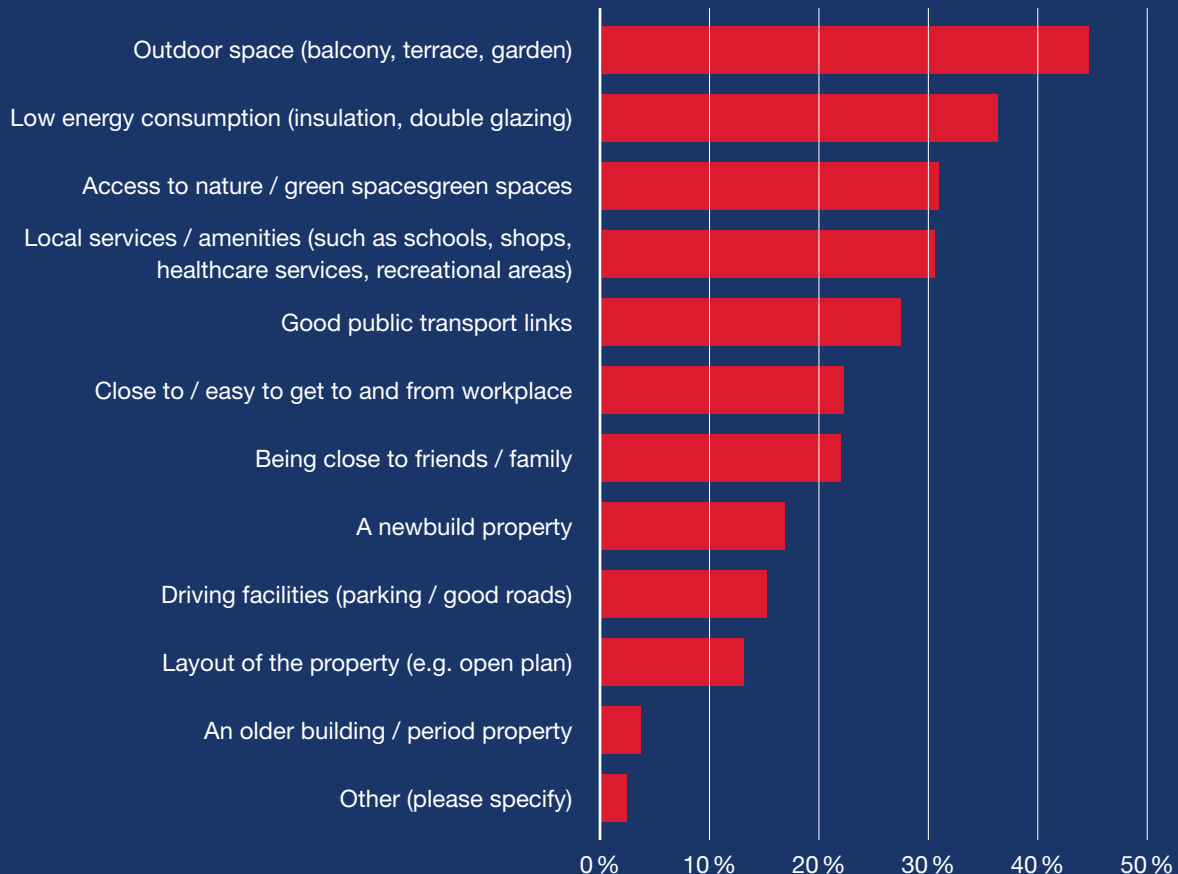
and just 35% prioritise being close to loved ones over their home's location. This shift in priorities underscores the evolving nature of home selection criteria in the post-pandemic world.

Affordability remains a critical concern for many, with 51% of respondents indicating that they would prioritise cost over location when choosing a home. This trend is particularly pronounced in Greece (59%), Ireland (58%) and Italy (58%).

These shifting priorities are a reflection of broader changes in lifestyle and living conditions across Europe. The desire for outdoor space and energy efficiency, driven by both environmental concerns and the practicalities of living through a pandemic, suggests that future housing developments will need to adapt to meet these evolving demands.

Outdoor space and energy efficiency are the top priorities for Europeans when choosing where to live.

Most important aspects when looking for a new home



Moving Motivations: Standards, Space, and Location

For those likely to move in the near future, the primary motivations are higher housing standards, more space, and better locations. Respondents in Turkey were most likely to prioritise housing standards (43%), while those in the Czech Republic are most focused on space (49%). Factors such as weather, on the other hand, have limited influence people's decisions to move, with only 8% of respondents citing climate as a reason for relocation.

Nearly half (49%) of those considering a move plan to purchase their new home, with countries including Turkey (72%) and Romania (72%) with the highest percentages of those soon to be buying, reflecting wider trends of high home ownership in these countries. In contrast, residents of Switzerland are most likely to be moving into a private rental (58%), while social rentals are more common in Finland (21%) and the Netherlands (21%) compared to the European average (8%).

Cities vs Suburbs

The desire to move is also influenced by urbanisation trends, with 31% of likely movers planning to relocate to more urban areas. This trend is most pronounced in Turkey (55%) and Romania (42%), where a significant proportion of the population is drawn to city living. Meanwhile, 22% of respondents prefer the suburbs, with suburban relocation being particularly popular among the Polish (39%) and Czechs (33%). On the other hand, 18% of respondents are considering a move to more rural locations, reflecting a different set of preferences. Likely movers in France (30%) and Slovenia (29%) show a strong inclination toward rural living, highlighting the diverse range of preferences when it comes to living environments.

High costs in the way of homeownership

Despite the desire for better housing standards, more space, and improved locations, many would-be movers are held back by significant barriers. The most prominent obstacle is the high cost of properties, with 64% of those wanting to move citing the cost of doing so as the greatest challenge. This concern is particularly acute in countries like Croatia and Malta, where housing costs have reached prohibitive levels for many. Additionally, two-fifths of respondents (40%) say they do not have a large enough deposit to make a move, with this issue being most prevalent in the Czech Republic (60%) and Greece (58%). Other barriers include the hassle of moving (25%), high interest rates (23%), and a lack of available properties in their preferred locations (18%).



This combination of high property prices, compounded by rising interest rates and living costs, is preventing many from making the leap into homeownership.

For many, finding the right property in the ideal location, or receiving a salary rise, are the changes most likely to encourage a move, with 36% of respondents citing these factors. Additionally, a reduction in interest rates (27%) were frequently mentioned, particularly in Turkey, where 55% expressed this concern.

Government support in purchasing property is also seen as crucial by some, with 19% of respondents highlighting it as an important factor, rising to 29% in both Greece and Turkey. These findings underline the fact that, while many are motivated to improve their housing situation, the financial barriers are often too great to overcome without significant changes in income, market conditions, or external support.

Reasons for moving home (% of those likely to move in next 12 months)	
For a better standard / quality of housing	34%
For more space	32%
To move to a better area	27%
For lower housing costs	26%
Practical reasons / circumstances	19%
To be closer to family / friends	16%
For better / more convenient transport links	14%
Because I / we can now afford it	13%
To free up money (downsizing)	13%
To get on the property ladder	11%
For cooler weather	8%
For warmer weather	8%
Other	6%

Country	Percentage of respondents who found properties too expensive
Croatia	76%
Malta	75%
Portugal	73%
Turkey	72%
Ireland	71%
Bulgaria	68%
Greece	68%
Hungary	68%
Austria	66%
Slovenia	64%
Czech Republic	64%
Romania	64%
Switzerland	64%
Germany	60%
Spain	59%
UK	57%
Netherlands	57%
Poland	55%
Finland	54%
Italy	52%
France	51%

Nearly two-thirds of those looking to move cite high property costs as the biggest obstacle.



Leaving a Legacy: Property and Family

For most European homeowners with children, passing down property is a given. Indeed, only 4% do not intend to leave their property or its value to their children. The majority plan to include their property in their will (34%), while a significant proportion intend to transfer ownership before they pass away (22%) - decisions reflecting the deep-rooted cultural importance of homeownership and the desire to provide a stable future for the next generation.

Homeowners who intend to pass on their property before they die, plan to do so on average within the next 12

years. Unsurprisingly, older respondents are much more likely to pass property on sooner, with many aged 55+ planning to pass properties within the next year (12%) or within the next five years (20%). Many, however, don't plan to pass on their property or its value before they die, with those in the Netherlands (25%) and the UK (26%) being the least likely to arrange this.

For many, the decision to leave property to their children is driven by a desire to provide financial security and stability. In an increasingly uncertain economic environment, the transfer of property

wealth from one generation to the next is seen as a critical way to ensure the future well-being of family members. And, in a period in which purchasing a first home is proving more difficult than it was for older generations, this planned generational transfer of wealth through housing is expected to contribute boosted market activity, leading to increased buying, selling, and investment opportunities, driving both demand and liquidity in the housing market.



Nearly all European homeowners plan to pass their property on to their children, with only 4% not intending to.

Navigating the Future of European Housing

The European housing market is in a state of significant transition, shaped by rising costs, shifting priorities, and evolving lifestyle needs. While financial pressures are a dominant concern, the desire for better housing conditions - whether through increased space, improved standards, or energy efficiency - continues to drive the market. Many Europeans are rethinking their housing choices, balancing the need for affordability with aspirations for a better quality of life.

Affordability remains one of the most pressing challenges, making homeownership and relocation difficult for many. Rising housing costs are prompting individuals and families to turn to borrowing

and credit as they seek to secure stable housing. Meanwhile, environmental sustainability, though increasingly important, is often seen as out of reach due to the financial investment required.

Despite these challenges, there is a strong focus on the future, with outdoor space, energy efficiency, and long-term homeownership playing key roles in shaping housing preferences. Many homeowners see their properties as valuable assets, not just for themselves but as a legacy for their children.

As these trends continue to shape the housing market, real estate professionals and policymakers will need to provide

guidance and support, helping residents find practical solutions in a rapidly evolving landscape. The path ahead will require adaptability and a focus on creating accessible, sustainable housing that meets the diverse needs of Europe's population.

As we delve into the Country Summaries below, we'll uncover how these market dynamics unfold across individual nations, each facing its own distinct challenges, opportunities, and trends. By examining these country-specific insights, we gain a deeper understanding of how Europeans are navigating the evolving housing landscape during this transformative time.



Homeownership in Austria is considerably lower than in many other European countries, with only 48% of respondents owning at least one property compared to the European average of 63%. However, when it comes to second homeownership, Austrians are more in line with the rest of Europe, with 23% of homeowners owning a second property, just slightly below the European average of 25%. Despite the lower ownership rates, Austrians report high levels of satisfaction with their current living situation, with 78% expressing satisfaction, and less than half (46%) wanting to change their housing situation.

Housing costs in Austria have risen for many over the past year, with 62% of respondents reporting an increase - more than the European average of 54%. This may contribute to the 27% of Austrians who would consider moving abroad for a more affordable life.

In terms of what they're looking for when choosing a property, Austrians prioritise outdoor space (51%), access to nature and green spaces (36%), and good public transport links (36%) more so than many other Europeans. These preferences indicate that Austrians place a high value on the quality of life that a property's surroundings can offer, rather than the features of the property itself. This is further supported by the fact that factors such as the layout of the property (8%) and whether it is a newbuild (13%) are less important to Austrians compared to their European counterparts.

Key Facts Comparison with European average

Own at least one property	48%	-15%
Happy with your current living situation	78%	+2%
Likely to move within the next 12 months	17%	-1%
Housing costs have increased in the last year	62%	+8%
Think affordability is more important than location	49%	-2%
Financially comfortable with current housing situation	45%	+1%
Would move abroad for a more affordable life	27%	+3%
Homeowners that own more than one property	23%	-2%

Five most important factors when choosing where to live

Outdoor space (balcony, terrace, garden)	51%	+7%
Good public transport links	36%	+8%
Access to nature / green spaces	36%	+5%
Low energy consumption (insulation, double glazing)	31%	-5%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	24%	-6%

78%
of respondents are happy with their current living situation.



51%
choose where to live based on the availability of outdoor space.



In Bulgaria, homeownership is notably strong, with 80% of respondents owning at least one property, which is significantly higher than the European average (63%). Even more striking is the fact that nearly half of these homeowners (46%) own a second property, a figure far surpassing the European average of 25%. Of those who own a second home, 43% use it as a holiday home, 21% plan to use it for their retirement, and 20% intend to provide it to their children when they move out. This high level of property ownership is accompanied by a general contentment with their living situation, too, with 82% of Bulgarians reporting that they are happy with their current housing conditions.

Despite this satisfaction, housing costs have increased for 59% of respondents over the past year, and only 41% feel financially comfortable with their current housing situation, with even fewer (36%) feeling at ease with their energy costs. However, Bulgarians are only slightly more likely than the European average to consider installing solar panels (29% vs. 27%) and double glazing (27% vs. 25%).

They are less likely than the average European to invest in other energy-saving measures, such as rainwater capture systems (18% vs. 20%) or heat pumps (15% vs. 19%). Additionally, low energy consumption is less of a priority for Bulgarians when buying a property (33%) compared to the European average.

Interestingly, while access to nature and green spaces is a higher priority in Bulgaria (35%) than the European average (31%), having personal outdoor space as part of the property is less important. Only 37% prioritise features like balconies or gardens, compared to the European average of 44%, suggesting that Bulgarians may prefer spending time in natural surroundings near their homes rather than maintaining private outdoor spaces.

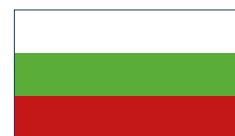
Bulgaria

Key Facts	Comparison with European average	
Own at least one property	80%	+17%
Happy with your current living situation	82%	+6%
Likely to move within the next 12 months	17%	-1%
Housing costs have increased in the last year	59%	+5%
Think affordability is more important than location	45%	-6%
Financially comfortable with current housing situation	41%	-3%
Would move abroad for a more affordable life	18%	-6%
Homeowners that own more than one property	46%	+21%

Five most important factors when choosing where to live	Comparison with European average	
Outdoor space (balcony, terrace, garden)	37%	-7%
Access to nature / green spaces	35%	+4%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	33%	+3%
Low energy consumption (insulation, double glazing)	33%	-3%
Good public transport links	24%	-3%

82%

of respondents are happy with their current living situation.



37%

choose where to live based on the availability of outdoor space.



In Croatia, property ownership is particularly high, with 83% of respondents owning at least one property, well above the European average (63%). Additionally, a significant 37% of Croatian homeowners own a second property, reflecting a strong culture of property investment in the country. Of those who own a second home, half use it as a holiday home (50%), while just over a quarter plan to use it for their retirement (27%). These second homes are distributed across various locations, with 29% situated in urban areas, 26% in rural settings, and 22% along the coast. This high rate of ownership correlates with a general satisfaction with their housing situation, as 77% of respondents report being happy with their current living conditions.

This contentment may explain why only 11% of Croatians are likely to move within the next 12 months, a rate much lower than the European average. Furthermore, only 20% of respondents are willing to move abroad for a more affordable life, indicating that the majority of Croatians are satisfied with the options available to them within the country. With 47% of Croatians feeling

comfortable with their housing costs, it's clear that affordability plays a significant role in this overall satisfaction, reducing the incentive to seek housing opportunities elsewhere.

Proximity to local services and amenities is a top priority for Croatians, with 38% of respondents citing it as an important factor when purchasing a property. This is higher than the European average, suggesting that convenience and access to essential services are key considerations. Additionally, having ample outdoor space is important to 45% of respondents, and low energy costs are a priority for 42%, both of which are also above average.

Key Facts

		Comparison with European average
Own at least one property	83%	+20%
Happy with your current living situation	77%	+1%
Likely to move within the next 12 months	11%	-7%
Housing costs have increased in the last year	59%	5%
Think affordability is more important than location	50%	-1%
Financially comfortable with current housing situation	47%	+3%
Would move abroad for a more affordable life	20%	-4%
Homeowners that own more than one property	37%	+12%

Five most important factors when choosing where to live

Outdoor space (balcony, terrace, garden)	45%	0%
Low energy consumption (insulation, double glazing)	42%	+6%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	38%	+8%
Access to nature / green spaces	29%	-2%
Good public transport links	25%	-2%

77%

of respondents are happy with their current living situation.



45%

choose where to live based on the availability of outdoor space.



In the Czech Republic, only 12% of respondents are planning to move within the next 12 months, suggesting a lower desire to move compared to elsewhere on the continent, where an average of 18% are planning to move in the next year. This lower level of activity may be partly due to the fact that 61% of Czechs have experienced an increase in housing costs over the past year, making affordability a more pressing concern. Interestingly, among those who are considering a move, 33% are planning to relocate to more suburban areas, which is higher than the European average of 22%, while only 20% are looking to move to more urban areas, compared to the European average of 31%. Indeed, with over half of the respondents (53%) now prioritising affordability over location when considering a move, it suggests there is a growing preference for suburban living in the Czech Republic, potentially due to the appeal of more affordable housing.

Homeownership in Czech Republic is slightly below the European average, with 59% of respondents owning at least one property. However, second home ownership is fairly consistent with the rest of Europe, with 24% of home-

owners owning a second property. This suggests that while primary home-ownership may be slightly lower, there is still a strong inclination towards property investment among those who are already on the property ladder.

The preferences of Czech respondents align closely with broader European trends. Outdoor space is a key consideration for 47% of respondents, and low energy consumption is important to 37%, reflecting a common desire for energy efficiency and access to outdoor areas. Additionally, 35% of Czechs prioritise access to nature and green spaces, and 33% value proximity to local services and amenities, further underscoring the importance of both lifestyle and practical considerations in their housing choices.

While Czechs are less likely to prioritise newbuild properties (14%) or the layout of the property (6%), their overall preferences suggest a balanced approach that values both the quality of the living environment and the functionality of the home. This considered and comprehensive approach when it comes to choosing a home, combined with a focus on affordability, may be behind the relatively low mobility within the Czech housing market.

Key Facts		Comparison with European average
Own at least one property	59%	-4%
Happy with your current living situation	72%	-4%
Likely to move within the next 12 months	12%	-6%
Housing costs have increased in the last year	61%	+7%
Think affordability is more important than location	53%	+2%
Financially comfortable with current housing situation	42%	-2%
Would move abroad for a more affordable life	22%	-2%
Homeowners that own more than one property	24%	-1%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	47%	+3%
Low energy consumption (insulation, double glazing)	37%	+1%
Access to nature / green spaces	35%	+4%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	33%	+3%
Good public transport links	31%	+3%

72%
of respondents are happy with their current living situation.



47%
choose where to live based on the availability of outdoor space.



In Finland, homeownership is relatively low, with only 47% of respondents owning at least one property, which is well below the European average. Despite this, there is less of a desire to change housing situations compared to other countries, with only 48% expressing a wish to change their housing situation. This suggests that owning a home may not be as high a priority in Finland, and that many are content with their current living arrangements. Additionally, the desire to move abroad is also lower, with only 16% of respondents saying they'd consider relocation outside of Finland, indicating a general satisfaction with living conditions in a country that has consistently ranked first in the UN World Happiness Report for the last seven years.⁴

47% of Finns have seen an increase in housing costs over the past year, and only 39% feel financially comfortable with their current housing situation. However, the situation is different when it comes to energy costs, where nearly 59% of respondents report feeling comfortable. This greater financial stability regarding energy expenses suggests that Finland's strong commitment to sustainability and clear energy goals⁵ may have contributed

to a stable and affordable energy market. As a result, low energy consumption is a relatively low priority for Finns when purchasing a property, with only 23% citing it as a key factor—significantly lower than the European average of 36%. Additionally, Finns are less likely to add sustainability measures to their homes, with only 17% likely to install solar panels, 15% to add double glazing, 9% to implement rainwater capture measures, and 16% to install a heat pump—all well below the European averages.

Instead, Finnish respondents prioritise access to local services and amenities (46%) and good public transport links (36%), highlighting the importance of convenience and connectivity in their housing decisions. Driving facilities are also a significant consideration, with 25% of Finns prioritising parking and good road access, which is higher than in many other European countries (European average 15%). Additionally, proximity to nature is a notable factor for many Finns, with a significant portion (34%) seeking homes near green spaces and natural environments, reflecting the country's deep cultural connection to nature and outdoor activities.

Key Facts

		Comparison with European average
Own at least one property	47%	-16%
Happy with your current living situation	76%	0%
Likely to move within the next 12 months	19%	+1%
Housing costs have increased in the last year	47%	-7%
Think affordability is more important than location	56%	+5%
Financially comfortable with current housing situation	39%	-5%
Would move abroad for a more affordable life	16%	-8%
Homeowners that own more than one property	26%	+1%

Five most important factors when choosing where to live

Local services / amenities (such as schools, shops, healthcare services, recreational areas)	46%	+15%
Outdoor space (balcony, terrace, garden)	41%	-3%
Good public transport links	34%	+3%
Driving facilities (parking / good roads)	25%	+10%
Access to nature / green spaces	23%	-13%

76%

of respondents are happy with their current living situation.



46%

choose where to live based on the availability of local services.

⁴ <https://www.cnn.com/2024/03/20/happiest-countries-world-happiness-report-2024.html>

⁵ <https://www.iea.org/news/finland-s-nuclear-and-renewable-power-strengths-provide-a-solid-foundation-for-reaching-its-ambitious-climate-targets-iea-review-says>



In France, housing costs for many appear not to have risen as much as they have done in other European countries, with 45% of respondents reporting an increase in the last year. This might be why affordability is not as significant a concern as location for many French residents, with only 43% prioritising affordability over location when considering a move. However, energy costs remain a notable issue, as only 32% of respondents feel financially comfortable with their energy expenses, which is lower than the European average (43%).

This concern over energy costs likely drives the high priority placed on low energy consumption when looking for a property. In fact, 46% of French respondents rank energy efficiency as a key factor in their housing decisions, a figure that is significantly higher than the European average (36%). The only factor ranked higher is outdoor space, with 50% of respondents prioritising features like balconies, terraces, or gardens. Reflecting this emphasis on sustainability, 18% of French respondents have already added rainwater capture measures to their properties, and 12% have installed heat pumps, both figures notably higher than the European aver-

ages (9% and 7% respectively).

Additionally, of the 19% of French respondents are likely to move in the next 12 months, a notable 30% planning to relocate to more rural areas—the highest percentage among the countries surveyed, and far higher than the European average of 18%. This preference for rural living, coupled with the emphasis on outdoor space and energy efficiency, suggests that many French residents prioritise personal and environmental comfort over convenience in location, making access to local services (24%), green spaces (28%), and good transport links (19%) less critical in their decision-making.

While property ownership in France is fairly comparable to the rest of Europe, with 61% owning at least one property, second property ownership is notably low at 11%, making it one of the lowest among the countries surveyed.

Key Facts		Comparison with European average	
Own at least one property	61%	-2%	
Happy with your current living situation	78%	+2%	
Likely to move within the next 12 months	19%	+1%	
Housing costs have increased in the last year	45%	-9%	
Think affordability is more important than location	43%	-8%	
Financially comfortable with current housing situation	42%	-2%	
Would move abroad for a more affordable life	17%	-7%	
Homeowners that own more than one property	11%	-14%	

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	50%	+5%
Low energy consumption (insulation, double glazing)	46%	+9%
Access to nature / green spaces	28%	-3%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	24%	-7%
Being close to friends / family	24%	2%

78%
of respondents are happy with their current living situation.



50%
choose where to live based on the availability of outdoor space.



Germany

In Germany, homeownership is notably low, with only 34% of respondents owning a property, making it one of the lowest rates among the countries surveyed, reflecting a longstanding trend⁶. Despite this, the desire to change housing situations is lower than in most other countries, with only 46% of Germans expressing a wish to alter their current living conditions. With 62% of respondents currently renting, it appears that there is no significant urgency among these Germans to get on the property ladder, potentially reflecting contentment with this living situation. Indeed, Germans have particularly strong tenant protections and rent control measures with their 'Mietpreisbremse', which limit rent increases and enable long-term lease agreements, making renting a secure and financially stable option.⁷

Perhaps unsurprisingly, second property ownership is also low in Germany, with just 14% of homeowners owning an additional property. Housing costs have not increased for as many Germans over the past year compared to other countries, with only 47% of respondents reporting a rise. In spite of this, the percentage of Germans who feel financially

comfortable with their housing situation (46%) and energy costs (44%) is broadly similar to the European average, indicating that while costs may not have risen for as many, financial comfort levels are still moderate.

When it comes to property preferences, outdoor space is of particularly high importance to Germans, with 54% prioritising it when purchasing a property. Access to nature (34%), good transport links (32%), and proximity to family and friends (27%) are also important factors for Germans, indicating a strong preference for a living environment that supports quality of life and convenience. However, the layout of a property (9%) and whether it is a newbuild (10%) are not as important, suggesting that Germans may prioritise location and external features over the specifics of the property's design or age.

Key Facts		Comparison with European average
Own at least one property	34%	-29%
Happy with your current living situation	77%	+1%
Likely to move within the next 12 months	17%	-1%
Housing costs have increased in the last year	47%	-7%
Think affordability is more important than location	51%	0%
Financially comfortable with current housing situation	46%	+2%
Would move abroad for a more affordable life	23%	-1%
Homeowners that own more than one property	14%	-11%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	54%	+10%
Low energy consumption (insulation, double glazing)	35%	-1%
Access to nature / green spaces	34%	+3%
Being close to friends / family	27%	+5%
Good public transport links	32%	+5%

77%
of respondents are happy with their current living situation.



54%
choose where to live based on the availability of outdoor space.

⁶ <https://www.statista.com/statistics/543381/house-owners-among-population-germany/#:~:text=Homeownership%20rate%20in%20Germany%202010%2D2022&text=Between%202008%20and%202022%2C%20the,in%20an%20owner%2Doccupied%2Ddwelling.>
⁷ <https://conny.de/en/rent/rent-control/information>



In Greece, financial struggles are evident, with only 24% of respondents feeling financially comfortable with their current housing situation, and an even lower 17% feeling comfortable with their energy costs. Despite this situation, only slightly more than the European average have turned to additional forms of credit or borrowing for assistance with their monthly costs (17% vs. 15%). This financial strain may have contributed to many Greeks considering the implementation of sustainability measures, with 33% contemplating the installation of solar panels and 24% considering heat pumps—both figures significantly above the European averages (27% and 19% respectively).

The emphasis on affordability is strong in Greece, with 59% of respondents prioritising it over location when considering a move. Low energy consumption is a primary concern for 43% of Greeks when looking at new properties, and is the highest among their property priorities. In Greece’s hot climate, this focus on energy efficiency likely drives the popularity of new build properties, with 22% of respondents preferring them, as they are typically more energy efficient. This willingness to compromise on

factors like access to nature (25%) and local services (27%) further underscores the importance placed on affordability and energy efficiency in the Greek housing market.

Interestingly, despite these financial challenges, property ownership in Greece is consistent with the European average, with 64% of respondents owning at least one property. Moreover, second property ownership is significantly higher in Greece, with 39% of homeowners owning additional properties, and only 3% of those being abroad, indicating a strong cultural emphasis on property investment within Greece even in the face of economic difficulties. Of those who own a second home, 51% use it as a holiday home, while 21% rent it out, indicating a blend of personal use and income generation. These second homes are primarily located in coastal areas (41%) and urban areas (25%), underscoring the appeal of Greece’s scenic coastline and vibrant cities.

Key Facts	Comparison with European average	
Own at least one property	64%	+1%
Happy with your current living situation	68%	-8%
Likely to move within the next 12 months	18%	0%
Housing costs have increased in the last year	53%	-1%
Think affordability is more important than location	59%	+8%
Financially comfortable with current housing situation	24%	-20%
Would move abroad for a more affordable life	24%	0%
Homeowners that own more than one property	39%	+14%

Five most important factors when choosing where to live		
Low energy consumption (insulation, double glazing)	43%	+7%
Outdoor space (balcony, terrace, garden)	42%	-2%
Close to / easy to get to and from workplace	28%	+6%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	27%	-3%
Access to nature / green spaces	25%	-6%

68%

of respondents are happy with their current living situation.



43%

choose where to live based on low energy consumption.



Hungary

In Hungary, low energy consumption is the top priority for those purchasing a property, with 54% of respondents citing it as a key factor—significantly higher than the European average of 36%. This focus on energy efficiency is particularly striking given that fewer Hungarians are considering implementing energy-saving measures compared to the rest of Europe. For instance, only 21% plan to install solar panels, and 23% are considering adding double glazing, both below the European averages of 27% and 25%, respectively.

Household costs in Hungary have not risen more than in other parts of Europe, with 53% reporting increased housing costs, and 41% feeling financially comfortable with their energy expenses, aligning with the broader European context. This suggests that the emphasis on low energy consumption might be more about long-term concerns or future-proofing rather than immediate financial pressures.

Interestingly, despite this strong emphasis on energy efficiency, Hungarian respondents are less likely to prioritise newbuild properties, which are typically more energy-efficient. Only 13% see newbuilds as a key factor, compared to a higher preference in other European countries. Additionally, outdoor space is less of a priority for Hungarians (36%) compared to their European neighbours.

However, they place a relatively high importance on good public transport links (30%) and access to nature and green spaces (33%), highlighting a preference for convenience and quality of life factors beyond the property itself.

Homeownership in Hungary is relatively high, with 75% of respondents owning at least one property, which is above the European average of 63%. Despite this, only 69% of Hungarians are happy with their current living situation, a lower satisfaction rate than the European average. Quality issues seem to be the biggest issue with dissatisfied respondents, with poor insulation/ventilation (36%) and electrical issues (24%) two of the biggest concerns, along with their property being too small (28%). This dissatisfaction may contribute to the fact that 31% of Hungarians are willing to move abroad for a more affordable life. This willingness to relocate, despite high ownership rates, suggests that financial concerns or a desire for better living conditions might be driving this sentiment.

Second property ownership in Hungary is notably lower at 17%, compared to the European average of 25%. This is somewhat surprising given the high rate of primary homeownership, indicating that while many Hungarians are on the property ladder, fewer have either the ability or desire to invest in additional properties.

Key Facts		Comparison with European average
Own at least one property	75%	+12%
Happy with your current living situation	69%	-7%
Likely to move within the next 12 months	16%	-2%
Housing costs have increased in the last year	53%	-1%
Think affordability is more important than location	57%	+6%
Financially comfortable with current housing situation	42%	-2%
Would move abroad for a more affordable life	31%	+7%
Homeowners that own more than one property	17%	-8%

Five most important factors when choosing where to live		
Low energy consumption (insulation, double glazing)	54%	+18%
Outdoor space (balcony, terrace, garden)	36%	-9%
Access to nature / green spaces	33%	+2%
Good public transport links	30%	+2%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	29%	-1%

69%
of respondents are happy with their current living situation.



54%
choose where to live based on low energy consumption.



Ireland

In Ireland, the overall housing situation appears challenging, with 18% of respondents dissatisfied with their current living conditions - the highest percentage among European countries. The main driver of this dissatisfaction is affordability, with nearly half (48%) of dissatisfied respondents citing it as a primary concern. Additionally, 40% of those dissatisfied feel their property is too small. Reflecting this widespread discontent, 60% of respondents indicate a desire to change their housing situation. The issue of affordability extends beyond just housing prices; only 37% of respondents feel financially comfortable with their current housing situation, and an even smaller percentage, 30%, are comfortable with their energy costs. These financial strains likely contribute to the fact that 58% of Irish respondents now prioritise affordability over location when considering a move, a stark contrast to their British neighbours, who still heavily value location.

Perhaps due to these financial pressures, Ireland has one of the highest levels of willingness to move abroad, with 33% of respondents open to relocating for a more affordable life. This trend is consistent with the lower rates of home-

ownership in the country, where only 53% of respondents own at least one property and, among this group, second property ownership is even lower at 11%. These figures are notably below the European averages, suggesting that financial constraints are significantly impacting property ownership in Ireland.

Whilst affordability is more important than location for the majority of Irish respondents, other location-related factors remain some of the biggest motivations when purchasing a property in Ireland. Access to local services and amenities is the top priority for 42% of respondents, and the desire to be close to friends and family (29%), good public transport links (33%), and proximity to the workplace (26%) are also strong. These factors score much higher compared to other Europeans than other considerations such as access to nature (21%), having outdoor space (36%), or low energy consumption (32%), which are all well below the European average.

Key Facts		Comparison with European average
Own at least one property	53%	-10%
Happy with your current living situation	67%	-9%
Likely to move within the next 12 months	20%	+2%
Housing costs have increased in the last year	59%	+5%
Think affordability is more important than location	58%	+7%
Financially comfortable with current housing situation	37%	-7%
Would move abroad for a more affordable life	33%	+9%
Homeowners that own more than one property	11%	-14%

Five most important factors when choosing where to live		
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	42%	+11%
Outdoor space (balcony, terrace, garden)	36%	-8%
Good public transport links	33%	+6%
Low energy consumption (insulation, double glazing)	32%	-4%
Being close to friends / family	29%	+7%

67%

of respondents are happy with their current living situation.



42%

choose where to live based on the availability of local services.



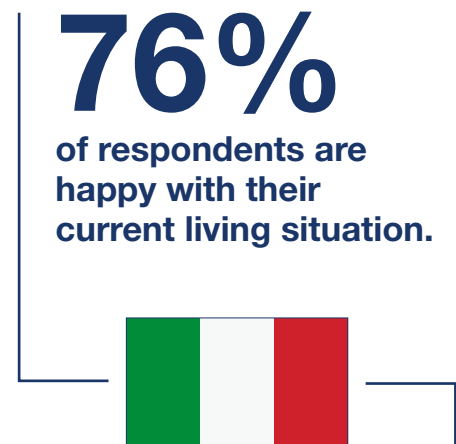
In Italy, only 39% of respondents reported an increase in housing costs over the past year, which is lower than the European average of 54%. Despite this, only 37% of Italians feel financially comfortable with their energy costs, which is less than the 43% average across Europe. This financial discomfort likely drives the higher-than-average priority Italians place on low energy consumption when purchasing a property, with 44% highlighting it as a key factor.

Italians also highly value outdoor space, with 52% prioritising features like balconies, terraces, or gardens when buying a property, compared to the 44% European average. However, other factors such as the layout of the property (9%) and the proximity to work (16%) seem to be less critical to Italians, indicating a focused preference for specific lifestyle enhancements over a more logistical considerations.

Italy’s homeownership rate is strong, standing at 72%. The percentage of Italians likely to move within the next 12 months (17%) is closely aligned with the overall European trend of 18%, suggesting a consistent yet cautious approach to relocating. Furthermore, 54% of Italians express a desire to change their housing situation, and 28% of Italians are willing to move abroad for a more affordable life – a figure above the European average of 24%, highlighting a significant openness to international relocation as a solution to financial challenges. This figure suggests that, despite lower increases in housing costs, Italians are still actively considering drastic measures to improve their financial well-being.

Key Facts	Comparison with European average	
Own at least one property	72%	+9%
Happy with your current living situation	76%	0%
Likely to move within the next 12 months	17%	-1%
Housing costs have increased in the last year	39%	-15%
Think affordability is more important than location	58%	+7%
Financially comfortable with current housing situation	46%	+2%
Would move abroad for a more affordable life	28%	+4%
Homeowners that own more than one property	26%	+1%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	52%	+8%
Low energy consumption (insulation, double glazing)	44%	+8%
Access to nature / green spaces	25%	-6%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	24%	-6%
Good public transport links	23%	-4%





Malta

Affordability is a significant concern in Malta, with 44% of respondents indicating a willingness to move abroad for a more affordable life - the highest percentage among all countries surveyed, representing 20% more than the European average (24%). This high level of financial pressure is likely driven by the fact that 61% of respondents have experienced an increase in housing costs over the past year, and only 34% feel financially comfortable with their housing situation. Additionally, just 38% are comfortable with their energy costs, reflecting the broader financial challenges faced by many in Malta.

Homeownership in Malta is relatively low, with only 46% of respondents owning at least one property, and second property ownership is also low at 19%. While 75% of respondents report being happy with their current housing situation, 15% are unsatisfied—higher than the European average of 10%. This suggests that while a majority of Maltese residents find contentment in their current living conditions, there remains a significant portion struggling with the costs and limitations of their housing, highlighting ongoing challenges in the Maltese housing market.

When it comes to motivations for purchasing a property, outdoor space is a key priority for Maltese respondents, with 50% citing it as an important factor. Interestingly, the next most popular motivation is being close to their workplace, which 28% of respondents prioritise a higher percentage than in most other European countries. This focus on proximity to work reflects the practical considerations that drive housing decisions in Malta.

Other motivations, such as being close to local services (24%), access to nature (27%), and proximity to friends and family (14%), are generally lower than the European average. Instead, Maltese respondents place more importance on property features like the layout (21%) and driving facilities (22%), indicating a preference for functional aspects of the home over location-based factors. This unique combination of priorities suggests that while Maltese residents are concerned about affordability, they also value specific property features that enhance their quality of life.

Key Facts		Comparison with European average
Own at least one property	46%	-17%
Happy with your current living situation	75%	-1%
Likely to move within the next 12 months	18%	0%
Housing costs have increased in the last year	61%	+7%
Think affordability is more important than location	57%	+6%
Financially comfortable with current housing situation	34%	-10%
Would move abroad for a more affordable life	44%	+20%
Homeowners that own more than one property	19%	-6%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	50%	+6%
Close to / easy to get to and from workplace	28%	+6%
Access to nature / green spaces	27%	-4%
Low energy consumption (insulation, double glazing)	25%	-11%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	24%	-6%

75%
of respondents are happy with their current living situation.



50%
choose where to live based on the availability of outdoor space.



Dutch respondents demonstrate a significantly higher level of financial comfort compared to other Europeans, with 75% feeling secure in both their current housing situation and energy costs. This contrasts with the broader European average, where only 44% and 43% of respondents feel financially comfortable with their housing and energy costs, respectively. A key factor in this financial stability may be that only 46% of Dutch respondents reported an increase in housing costs over the past year, which is lower than the European average of 54%, allowing many Dutch households to maintain their financial well-being.

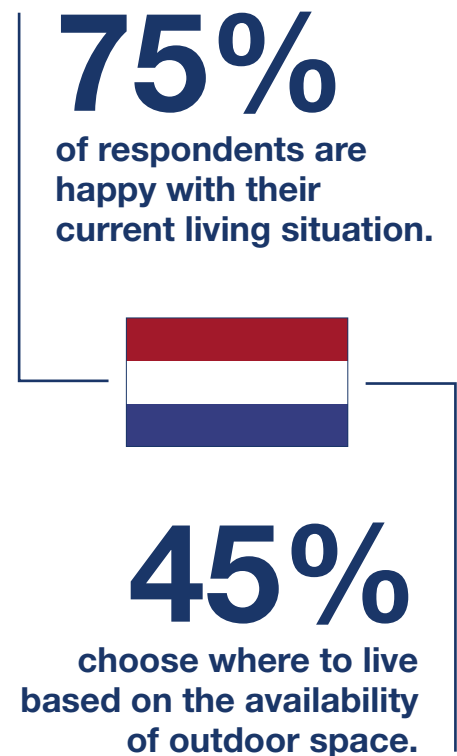
However, property ownership in the Netherlands is slightly lower than in other European countries, with only 59% of respondents owning at least one property, compared to a 63% average across Europe. Additionally, the percentage of Dutch homeowners owning a second property is strikingly low at just 8%, far below the European average of 25%. Despite these lower ownership rates, the Dutch show a higher willingness to relocate internationally, with 29% expressing a desire to move abroad for a more affordable life, compared to the 24% European average.

When it comes to motivations for purchasing a property, Dutch respondents place a high priority on low energy consumption, with 45% considering it a crucial factor, aligning with their strong financial comfort and a likely desire to maintain it. Additionally, good driving facilities (26%) and the layout of the property (22%) are also significant considerations, indicating that practical aspects of daily living are particularly important in the Dutch housing market.

Interestingly, reasons related to location, such as proximity to work (14%) and access to local services and amenities (21%), are less critical to Dutch buyers compared to the broader European population. This suggests that while Dutch homeowners value energy efficiency and practical features in a home, they may be more flexible or less concerned about location-related factors, potentially due to the country's compact size and well-developed infrastructure.

Key Facts	Comparison with European average	
Own at least one property	59%	-4%
Happy with your current living situation	84%	+8%
Likely to move within the next 12 months	16%	-2%
Housing costs have increased in the last year	46%	-8%
Think affordability is more important than location	53%	+2%
Financially comfortable with current housing situation	75%	+31%
Would move abroad for a more affordable life	29%	+5%
Homeowners that own more than one property	8%	-17%

Five most important factors when choosing where to live	Comparison with European average	
Outdoor space (balcony, terrace, garden)	45%	+1%
Low energy consumption (insulation, double glazing)	45%	+8%
Access to nature / green spaces	28%	-3%
Being close to friends / family	22%	0%
Layout of the property (e.g. open plan)	22%	+9%





Poland

In Poland, 69% of respondents report that their housing costs have increased in the past year - one of the highest rates in Europe. Despite this financial pressure, half of the respondents still feel financially comfortable with both their general housing costs and energy costs, which is above the European average. This financial resilience may explain why 80% of Polish respondents are happy with their current housing situation, a satisfaction rate higher than many other European countries.

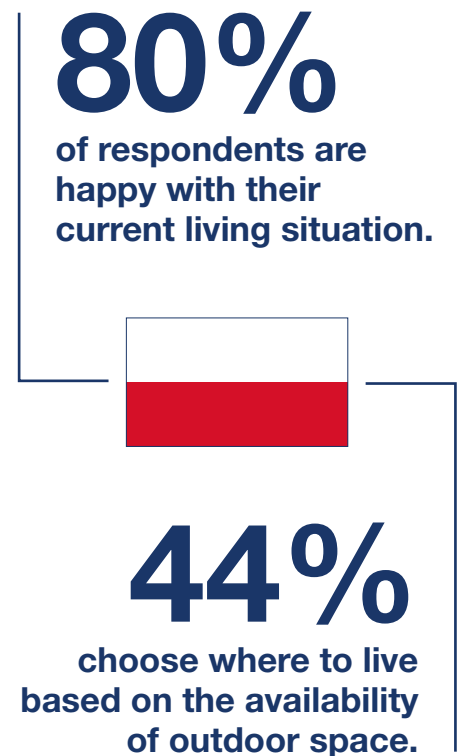
Homeownership is relatively high in Poland, with 71% of respondents owning at least one property, which is above the European average. However, second property ownership is lower, with only 17% of those owning a second home, indicating that while primary homeownership is strong, there is less investment in additional properties. Whilst only 16% of Polish respondents are planning to move in the next 12 months, interestingly a significant portion (39%) are looking to relocate to more suburban areas, the highest percentage of any European country (average of 22%). This suggests a growing trend among Poles to seek out the benefits of suburban living, such as more space and potentially lower

costs, reflecting a shift in housing preferences within the country.

The motivations for purchasing a property in Poland are largely in line with broader European trends, with a strong emphasis on outdoor space (44%), low energy consumption (33%), and access to nature (35%). However, Polish respondents place a higher value on being close to work (27%) and having good public transport links (30%), suggesting that accessibility and convenience are key factors in their housing decisions. These priorities indicate a desire for well-connected living environments that support both work-life balance and ease of commuting.

Key Facts		Comparison with European average
Own at least one property	71%	+8%
Happy with your current living situation	80%	+4%
Likely to move within the next 12 months	16%	-2%
Housing costs have increased in the last year	69%	+15%
Think affordability is more important than location	51%	0%
Financially comfortable with current housing situation	50%	+6%
Would move abroad for a more affordable life	23%	-1%
Homeowners that own more than one property	17%	-8%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	44%	-1%
Access to nature / green spaces	35%	+4%
Low energy consumption (insulation, double glazing)	33%	-3%
Good public transport links	30%	+3%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	28%	-2%





In Portugal, energy costs are not as significant a concern for respondents, with 60% reporting that they feel comfortable with their energy expenses. This is notable, given that almost half of the respondents (49%) have experienced an increase in household costs over the past year, suggesting that these increases may have impacted other areas more than energy. Despite this relative comfort with energy costs, Portuguese respondents still place a high value on low energy consumption properties, with 38% prioritising this factor – slightly higher than the European average (36%). Additionally, 28% are considering adding double glazing to their properties, which is slightly above the European average of 25%.

However, when it comes to other energy-saving actions, such as installing solar panels, heat pumps, or rainwater capture measures, Portuguese respondents are less likely to take these steps compared to their European counterparts. Specifically, only 24% are considering solar panels (compared to the European average of 27%), 15% are looking at heat pumps (versus 19%), and 13% are considering rainwater capture (compared to 20%). This suggests

that while there is a strong emphasis on energy efficiency, it is more focused on passive measures, rather than active installations.

When it comes to other motivations for purchasing a property, Portuguese respondents show preferences that are broadly similar to the rest of Europe. However, they are significantly more likely to prioritise proximity to their workplace, with 33% citing this as an important factor – much higher than the European average (22%). This indicates that work-life balance and commuting convenience are key considerations in the Portuguese housing market.

Despite a relatively high level of happiness with their current housing situation, with 77% expressing satisfaction, 62% of Portuguese respondents would like to change their housing situation. However, they are generally more financially comfortable, which might explain why only 19% are likely to move abroad for a more affordable life, a lower percentage compared to other European countries (24%). This suggests that while there is a desire for change, it is more likely to be sought within Portugal rather than through relocation abroad.

Key Facts		Comparison with European average	
Own at least one property	66%	+3%	
Happy with your current living situation	77%	+1%	
Likely to move within the next 12 months	19%	+1%	
Housing costs have increased in the last year	49%	-5%	
Think affordability is more important than location	47%	-4%	
Financially comfortable with current housing situation	53%	+9%	
Would move abroad for a more affordable life	19%	-5%	
Homeowners that own more than one property	21%	-4%	

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	46%	+2%
Low energy consumption (insulation, double glazing)	38%	+2%
Close to / easy to get to and from workplace	33%	+11%
Access to nature / green spaces	29%	-2%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	29%	-1%

77%
of respondents are happy with their current living situation.



46%
choose where to live based on the availability of outdoor space.



In Romania, homeownership is markedly high, with 85% of respondents owning at least one property, which is well above the European average. Additionally, 30% of Romanian homeowners own a second property, further highlighting the strong property ownership culture in the country. This high level of ownership is coupled with a strong sense of satisfaction, as 84% of respondents report being happy with their current living situation, significantly higher than the European average. Despite this general satisfaction, 18% of Romanian respondents are likely to move in the next 12 months, with 42% of those planning to relocate aiming to move to more urban areas—well above the European average of 31%.

However, this positive outlook is tempered by the fact that nearly two-thirds of Romanians (64%) report that their housing costs have increased in the past year. Energy costs, in particular, seem to be a significant concern, with only 35% of respondents feeling comfortable with these expenses. This financial strain is reflected in the priorities of Romanian homebuyers, with 47% prioritising low energy consumption when purchasing a new property, making it the top concern.

The preference for newbuild properties is also higher in Romania (24%) compared to the European average, potentially due to their better energy efficiency.

Interestingly, while Romanians place a high value on energy efficiency and newbuild properties, they are less concerned with being close to friends and family, with only 12% prioritising this factor. This is notably lower than in many other European countries, indicating that Romanians may be more focused on the practical aspects of their housing choices rather than social proximity.

Key Facts Comparison with European average

Own at least one property	85%	+22%
Happy with your current living situation	84%	+8%
Likely to move within the next 12 months	18%	0%
Housing costs have increased in the last year	64%	+10%
Think affordability is more important than location	44%	-7%
Financially comfortable with current housing situation	43%	-1%
Would move abroad for a more affordable life	22%	-2%
Homeowners that own more than one property	30%	+5%

Five most important factors when choosing where to live

Low energy consumption (insulation, double glazing)	47%	+10%
Outdoor space (balcony, terrace, garden)	37%	-8%
Access to nature / green spaces	35%	+4%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	31%	0%
Good public transport links	25%	-3%

84%
of respondents are happy with their current living situation.



47%
choose where to live based on low energy consumption.



Slovenia

In Slovenia, the housing market is showing a low level of mobility, with only 13% of respondents planning to move within the next 12 months. However, among those considering a move, 29% are planning to relocate to more rural areas, significantly higher than the European average of 18%, indicating a growing preference for rural living. Property ownership is in line with the European average at 65%, but second property ownership among this group is notably higher at 35%, suggesting that investing in additional properties is a priority for many Slovenian homeowners. Of those who own a second home, 38% use it as a holiday home, 25% plan to use it for their retirement, and 20% intend to provide it to their children when they move out. These second homes are primarily located in rural areas (33%), followed by coastal areas (21%) and urban areas (17%), reflecting a diverse range of preferences in property investment among Slovenian homeowners.

Financial comfort seems to be more common in Slovenia than in other parts of Europe, with 48% of respondents feeling financially comfortable with their housing situation, which is above the European average (44%). This is reflect-

ed in the lower percentage of respondents (45%) who rank affordability as more important than location. However, 29% of Slovenians are still willing to move abroad for a more affordable life - a figure higher than the European average (24%), indicating that while many are comfortable, a significant portion still seeks better financial conditions.

When it comes to property preferences, access to nature is a key motivator for Slovenians, with 40% prioritising this factor when choosing a home. This is surpassed only by the desire for outdoor space, such as a balcony or garden, which is important to 41% of respondents. In contrast, features like strong public transport links (20%) and energy efficiency (30%) are less important, suggesting that Slovenians may prioritise natural surroundings and outdoor living over urban conveniences and energy-saving measures.

Key Facts	Comparison with European average	
Own at least one property	65%	+2%
Happy with your current living situation	74%	-2%
Likely to move within the next 12 months	13%	-5%
Housing costs have increased in the last year	55%	+1%
Think affordability is more important than location	45%	-6%
Financially comfortable with current housing situation	48%	+4%
Would move abroad for a more affordable life	29%	+5%
Homeowners that own more than one property	35%	+10%

Five most important factors when choosing where to live	Comparison with European average	
Outdoor space (balcony, terrace, garden)	41%	-3%
Access to nature / green spaces	40%	+9%
Low energy consumption (insulation, double glazing)	30%	-6%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	32%	+2%
Being close to friends / family	25%	+3%
Close to / easy to get to and from workplace	25%	+3%

74%

of respondents are happy with their current living situation.



41%

choose where to live based on the availability of outdoor space.



In Spain, 56% of respondents now prioritise affordability over location when considering a move, reflecting a growing concern with managing living costs. Despite this emphasis on affordability, only 13% of Spaniards would be willing to move abroad for a more affordable life, the lowest percentage among all the countries surveyed. Instead, 38% of respondents would consider moving to a smaller city, town or village within Spain, and 17% would consider downsizing, indicating a strong preference to stay within the country and maintain their current lifestyle, albeit in a more affordable setting.

Housing costs have not risen for as many Spaniards as they have in other countries, with only 45% of respondents reporting an increase over the past year. Despite this, 22% of Spaniards are still struggling with the affordability of their current housing situation. This suggests that even moderate increases in costs are having a significant impact on a portion of the population. Additionally, Spanish respondents are notably less inclined to invest in sustainability measures compared to their European counterparts, with 47% unlikely to install solar panels, 30% unlikely to

install double glazing, and 54% unlikely to implement rainwater capture systems—figures that are all higher than the European averages. This reluctance to adopt energy-efficient technologies may exacerbate long-term affordability challenges, as these measures could help mitigate future cost increases.

When purchasing a property, having outdoor space is a key consideration for Spaniards, with 46% prioritising features like balconies, terraces, or gardens. However, access to nature is not as highly valued, with only 24% of respondents considering it important. Instead, proximity to local amenities (31%) and good transport links (31%) are valued more highly, indicating that convenience and access to services are more important factors in Spanish housing decisions than the surrounding natural environment.

Key Facts		Comparison with European average	
Own at least one property	68%	+5%	
Happy with your current living situation	77%	+1%	
Likely to move within the next 12 months	21%	+3%	
Housing costs have increased in the last year	45%	-9%	
Think affordability is more important than location	56%	+5%	
Financially comfortable with current housing situation	46%	+2%	
Would move abroad for a more affordable life	13%	-11%	
Homeowners that own more than one property	25%	0%	

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	46%	+2%
Low energy consumption (insulation, double glazing)	34%	-2%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	31%	+1%
Good public transport links	31%	+4%
Access to nature / green spaces	24%	-7%
Close to / easy to get to and from workplace	24%	+2%

77%
of respondents are happy with their current living situation.



46%
choose where to live based on the availability of outdoor space.



In Switzerland, homeownership is the lowest among all the countries surveyed, with only 30% of respondents owning at least one property. Unsurprisingly, second homeownership (17%) among this group is lower than the average among European homeowners (25%).

Only 43% of respondents have seen an increase in housing costs over the past year, which is lower than in many other European countries. Despite this, the percentage of respondents who feel financially comfortable is similar to the rest of Europe (42%) with 43% expressing financial comfort with their current housing situation and 40% with their energy costs.

While these financial circumstances reflect the wider picture on the continent, 28% of Swiss respondents would still consider moving abroad for a more affordable life - a figure 4% higher than average across Europe, perhaps indicating that the dream of homeownership is within much of Switzerland's financial goals.

When it comes to motivations for purchasing a property, outdoor space is the most significant factor for the Swiss, with over half of the respondents (53%) prioritising it. This preference for outdoor living reflects the importance of quality of life in Swiss housing decisions.

Good transport links (38%), being close to work (26%), and the layout of the property (19%) are also more important to the Swiss than to other Europeans. In contrast, energy-efficient houses (25%) and proximity to local services (21%) are less of a priority, indicating a unique set of preferences in the Swiss property market that leans more towards practicality and lifestyle rather than environmental considerations or convenience.

Key Facts		Comparison with European average
Own at least one property	30%	-33%
Happy with your current living situation	78%	+2%
Likely to move within the next 12 months	22%	+4%
Housing costs have increased in the last year	43%	-11%
Think affordability is more important than location	49%	-2%
Financially comfortable with current housing situation	43%	-1%
Would move abroad for a more affordable life	28%	+4%
Homeowners that own more than one property	17%	-8%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	53%	+9%
Good public transport links	38%	+11%
Access to nature / green spaces	29%	-2%
Close to / easy to get to and from workplace	26%	+4%
Low energy consumption (insulation, double glazing)	25%	-11%

78%

of respondents are happy with their current living situation.



53%

choose where to live based on the availability of outdoor space.



In Turkey, financial comfort is notably low, with only 27% of respondents feeling financially secure in their current housing situation, and just 28% comfortable with their energy costs. These figures are significantly below the European averages of 44% and 43%, respectively. This financial strain is likely linked to the fact that a considerable 75% of Turks have seen their housing costs increase over the past year, one of the highest rates in Europe. This economic pressure may also explain why 33% of Turkish respondents are likely to move within the next 12 months, a much higher percentage compared to the European average of 18%, with over half of those (55%) planning to move to an urban area. The primary reasons cited for relocating within the year include seeking a better standard of housing (43%), moving to a better area (37%), and the need for more space (27%).

Despite these financial challenges, property ownership in Turkey remains relatively high, with 70% of respondents owning at least one property, which is above the European average of 63%. Additionally, 31% of Turkish homeowners own a second property, exceeding the European average of 25%. This suggests that despite financial difficulties, the property market in Turkey remains accessible for most, with many individuals managing to invest in multiple properties.

When it comes to motivations for buying a property, 35% of Turks prioritise acquiring a newbuild. This preference indicates a strong desire for modern living standards and possibly a dissatisfaction with the quality of older properties. Additionally, 18% of respondents highlight the layout of the property as a key factor, further emphasising the importance of modern, functional living spaces in the Turkish housing market.


Interestingly, despite the financial challenges they face, only 28% of Turks consider low energy consumption a priority when purchasing a property, lower than the European average of 36%. However, Turkish respondents are by far the most likely to install sustainability measures in their homes over the next five years. A significant 52% are likely to install solar panels, 58% plan to install double glazing, 39% are considering rainwater capture systems, and 33% are looking to install ground or air-source heat pumps—figures that are well above the European averages of 27%, 25%, 20%, and 19% respectively. This proactive approach suggests that while energy efficiency may not be a top priority at the point of purchase, there is a strong commitment among Turks to enhance the sustainability of their homes post-purchase. Other factors, such as the appeal of outdoor space (42%), access to nature (33%), and proximity to local services (32%), outweigh initial concerns about energy efficiency.

Key Facts		Comparison with European average
Own at least one property	70%	+7%
Happy with your current living situation	72%	-4%
Likely to move within the next 12 months	33%	+15%
Housing costs have increased in the last year	75%	+21%
Think affordability is more important than location	51%	0%
Financially comfortable with current housing situation	27%	-17%
Would move abroad for a more affordable life	26%	+2%
Homeowners that own more than one property	31%	+6%

Five most important factors when choosing where to live		
Outdoor space (balcony, terrace, garden)	42%	-2%
A newbuild property	35%	+18%
Access to nature / green spaces	33%	+2%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	32%	+2%
Low energy consumption (insulation, double glazing)	28%	-8%

72%

of respondents are happy with their current living situation.



42%

choose where to live based on the availability of outdoor space.



In the UK, over half of the respondents (53%) feel financially comfortable with their current housing situation. While that leaves a significant proportion not comfortable with their costs, it does represent 9% being more financially comfortable than the European average. Meanwhile, 50% are comfortable with their energy costs, despite 49% reporting that their household costs have increased in the last year.

Only 24% of Brits, however, prioritise low energy consumption when purchasing a property, which is significantly lower than the European average of 36%. This lower emphasis on energy efficiency is further reflected in their reluctance to adopt sustainable technologies, with only 17% of respondents likely to install solar panels, and 14% likely to install a ground or air-source heat pump - less than the European averages of 27% and 19%, respectively. Instead, UK respondents place greater importance on being close to local services (37%), friends and family (29%), and having good public transport links (32%), reflecting the ongoing relevance of the old age property mantra, “location, location, location”.

Newbuild properties are less appealing to UK respondents, with only 9% prioritising them when purchasing a home, compared to higher preferences in other European countries (17%). However,

there is a notable affinity for period properties, with 9% of Brits considering them important, a higher percentage than of the rest of Europe (3%). This preference for older, character-rich homes might also be a factor in why energy efficiency is a lower priority for British buyers. Additionally, the layout of the property is a key factor for 17% of UK respondents, indicating that the internal structure and character of a home are significant considerations for British buyers.

Second property ownership in the UK is surprisingly low at 15% - especially given the higher levels of Brits (67%) who own at least one property, compared to the European average (63%). This suggests that while many Brits are on the property ladder, fewer are investing in additional properties, possibly due to economic constraints or a focus on maintaining their primary residence.

There is general contentment with Brits current living situation—79% report being happy—and only half (51%) would like to change their housing situation, which is slightly below the European average (55%). However, a notable 20% of UK respondents still plan to move within the next 12 months, indicating that while satisfaction is high, there is dynamism in the market with a significant portion of the population looking for change in the near future.

Key Facts Comparison with European average

Own at least one property	67%	+4%
Happy with your current living situation	79%	+3%
Likely to move within the next 12 months	20%	+2%
Housing costs have increased in the last year	49%	-5%
Think affordability is more important than location	47%	-4%
Financially comfortable with current housing situation	53%	+9%
Would move abroad for a more affordable life	24%	0%
Homeowners that own more than one property	15%	-10%

Five most important factors when choosing where to live

Outdoor space (balcony, terrace, garden)	44%	-1%
Local services / amenities (such as schools, shops, healthcare services, recreational areas)	37%	+7%
Good public transport links	32%	+5%
Access to nature / green spaces	30%	-1%
Being close to friends / family	29%	+8%

79%
of respondents are happy with their current living situation.



44%
choose where to live based on the availability of outdoor space.

Methodology

The RE/MAX European Housing Trend Report 2024 provides an in-depth analysis of the profound changes affecting Europe's housing market, exploring how financial pressures, shifting preferences and sustainability concerns are shaping housing decisions. All research, unless otherwise stated, was conducted by Opinium Research, who surveyed 20,000 adults (18+) across the UK, France, Germany, Austria, Bulgaria, Croatia, Czech Republic, Finland, Greece, Hungary, Ireland, Italy, Malta, Netherlands, Poland, Portugal, Romania, Slovenia, Spain, Switzerland and Turkey during August 2024. Results were weighted to be nationally representative per market.

Please Note: The findings presented in this report are derived from a comprehensive consumer survey conducted in August 2024. RE/MAX Europe does not assume liability for any developments or alterations that may have occurred since that time.

The 2024 RE/MAX Europe Housing Trend Report was written by Grayling, on behalf of RE/MAX Europe.

About RE/MAX

The RE/MAX Europe franchise network is one of the largest in the industry. The brand is represented by over 30,000 real estate professionals across 2,400 offices in 40 countries throughout the continent. With more than 50 years of experience, RE/MAX has grown into a huge global brand. Never one to rest on its past successes, RE/MAX Europe continues to build on its history of innovation to transform the way real estate is bought and sold across the continent.



Contact us

RE/MAX Europe

PMSCS Real Estate Franchising Inc.

Alpenstraße 15

6302 Zug, Switzerland

E: marketing@remax.eu

W: remax.eu