



SPOTLIGHT
Savills Research

Italy New Build Survey

2025



New homes: what are the buyers looking for in 2025?

A market in flux

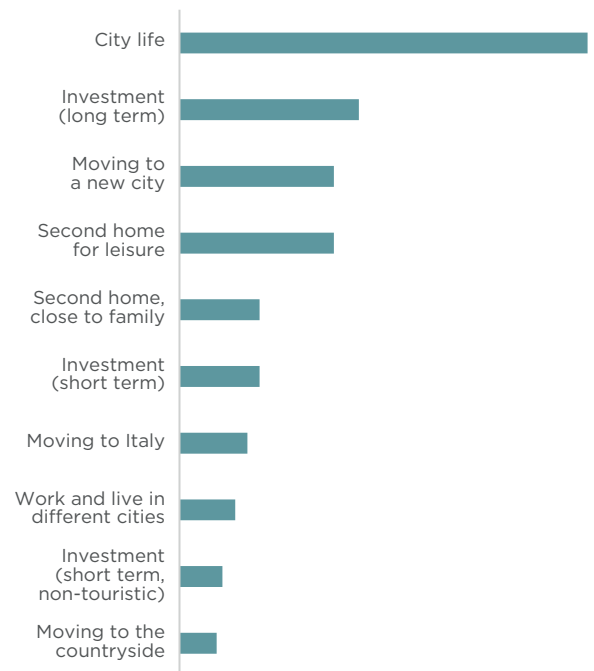
Over the last year, the Italian housing market has continued its evolution: the outdated vision of the 70s, where real estate was seen as the end-all safe investment has shifted to one where a home is seen as a strategic opportunity to enhance quality of life. Buyers are no longer solely focused on location or size, but on the kind of life a property can unlock. There is growing attention toward green living, energy efficiency, and access to nature, and not just as luxuries, but as essential ingredients of everyday wellbeing. Increasingly, people are drawn to residential solutions that provide comprehensive living ecosystems, where homes are nestled within a small universe that offers everything, from fitness areas to concierge services. In this new paradigm, the value of an area or neighbourhood becomes elusive, and the value of a home is defined not just by where it is, but by what it enables: comfort, connection, community, and a higher standard of living.

The survey sample identikit

More than half of the sample* interviewed for the second edition of our survey is aged between 36 and 65 years old, 68% of which with a fixed employment and a 63% with a budget up to € 450k.

The main reason that guided prospective buyers toward a newly built home was its green credentials (25%), followed by the guarantee of quality and amenities within the building (23%), and the convenience of avoiding renovation work (21%).

THE REASONS BEHIND A NEW HOME SEARCH



**The survey was conducted on a sample of 200 perspective new home buyers that contacted Savills over the spring 2025.*



Hopes, Plans & Places

Most respondents want to live in an urban location. While 100% of the under-35 cohort expressed a preference for city locations, leisure destinations such as the countryside, mountains, or seaside were most popular among the 46-65 cohort, a sign that confirms how second home locations are sparking increasing interest.

A home for every season of life

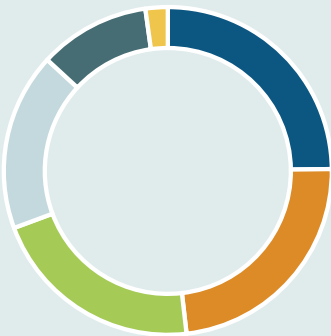
Different factors drive the desire for a new home across age groups, with budget and financing playing key roles.

Among buyers 35 and under, 80% are first-time buyers and 67% seek apartments with outdoor space, typically funding their purchase through a mix of personal savings and mortgage (52%). Buyers aged 36-45 mainly look to upgrade in size (63%) and nearly half prioritise outdoor space (48%), also relying on a combination of personal wealth and mortgage (45%) while balancing budget concerns.

The 46-64 group is split between upsizing (36%) and downsizing (35%), favouring apartments with outdoor space (55%) and penthouses (16%), often using profits from the sale of their previous home to finance their purchase (24%).

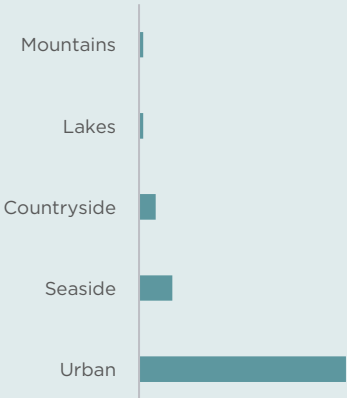
For those 65 and over, downsizing is most common (43%), with strong preferences for outdoor space (64%) and a tendency to fund purchases through personal wealth and resources (38%). Across all ages, investment and second-home purchases make up a smaller but notable share of the market.

WHY NEW BUILD?



- Green / Sustainability
- Services / Quality
- No renovations
- Cost saving / Value
- Tech / Automation
- Timing

TOP DESTINATION



More Than Four Walls

When it comes to what really matters in a new home, the story changes a bit with age, but some themes are a constant.

For buyers under 35, the focus is clear: sustainability and technology aren't up for debate, and the neighbourhood (more about community feel than exact location) together with building amenities and transport links, takes top priority.

Those aged 36 to 45 show a bit more flexibility. Many are willing to give up some space or wait a little longer to move in, but like their younger counterparts, they won't compromise on green features, tech, or essential amenities. The quality of the area and nearby services still drives their choices.

Buyers between 46 and 65 are comfortable sacrificing space or moving to less central locations, as long as the neighbourhood remains well connected and rich in amenities and services.

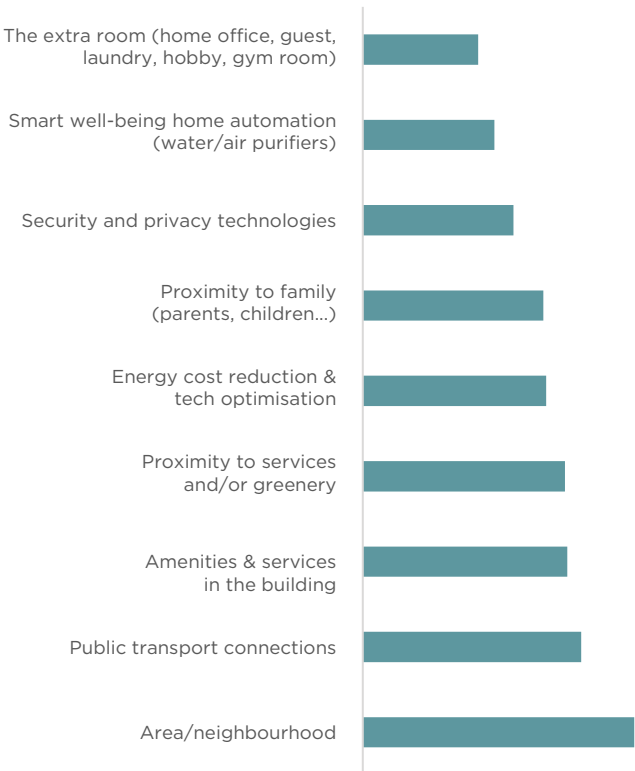
For those over 65, downsizing or moving further out is more common, but private parking is a must-have. Close proximity to family, a supportive neighbourhood, and smart home features that promote well-being are what truly makes a difference.

Across all ages, it's clear that buyers are seeking homes in greener, better-connected areas with plenty of services nearby, and they're often ready to step outside their usual zones to find that perfect fit.

When Plans Meet Reality

Across all age groups, the biggest concern is the imbalance between cost and quality of the property, affecting 64% of buyers under 35, 46% of those aged 36-45, and 52% of buyers aged 46-65. For the oldest group, uncertainty around delivery timing (38%) also weighs heavily, alongside cost-quality concerns (33%). Economic uncertainty is an added challenge particularly for buyers aged 36-45.

WHAT DO HOME BUYERS CARE ABOUT THE MOST?



Essentials by age

Amenities continue to play a crucial role in sealing the deal for prospective buyers, echoing the importance of comfort, security, and lifestyle seen throughout all age groups.

All respondents agree on the first place, choosing private parking or a garage, confirming its status as a non-negotiable. The second and third spots reveal more subtle differences: for the under-35s, a concierge (2nd) and 24/7 security (3rd) top the wish list, in

line with their focus on connectivity, convenience, and peace of mind.

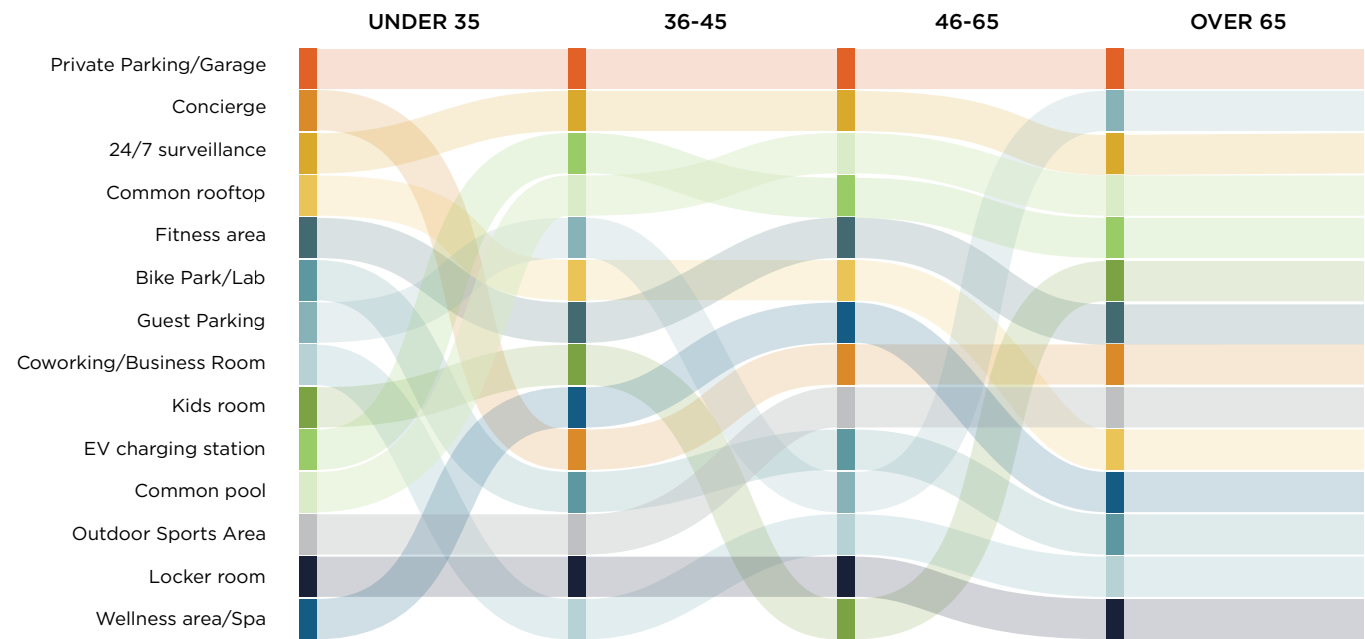
Meanwhile, those aged 36-45 place 24/7 security (2nd) and electric car charging stations (3rd) higher, reflecting their green awareness already highlighted in earlier findings.

Among the 46-65 age bracket, 24/7 security (2nd) and a swimming pool (3rd) secure their spots, pointing to a balance between safety and leisure.

Finally, buyers over 65 align with their peers on private parking but prioritise guest parking (2nd) and 24/7 security (3rd), showing a stronger emphasis on family visits and reassurance.

Interestingly, coworking spaces and business rooms consistently rank lowest across the board, reaffirming that, despite lifestyle upgrades, work-focused shared spaces are not seen as a top priority when looking for a new home.

THE AMENITIES EDIT: WANTS VERSUS WOULDN'T-MINDS



Buyer Profiles

Getting Started

Age <36

- Aged 35 or under
- Looking to buy their first property (80%), either for investment purposes (long-term rent, 23%) or need to move to another city (20%)
- Want an apartment, and it must have an outdoor space (67%)
- Will mostly resort to a combination of personal wealth and mortgage to finalise the purchase (52%)
- The biggest obstacle to buying would be to have an imbalance between cost and quality of the property (64%)
- Had to settle for smaller or not readily available properties
- Won't compromise on sustainability or technology
- Places most importance on area/neighbourhood, amenities and services in the building, transport connections



Family Foundations

Age 36-45

- Aged between 36 and 45 years old
- Looking to buy a bigger property than the last (63%)
- Want a second property to unwind and recharge (22%) or need to move to another city (18%)
- Want an apartment, and it must have an outdoor space (48%)
- Will mostly resort to a combination of personal wealth and mortgage to finalise the purchase (45%)
- The biggest obstacle to buying would be to have an imbalance between cost and quality of the property (46%) or deteriorating economic conditions (38%)
- Willing to sacrifice space (42%) or shorter availability (16%), but won't compromise on sustainability, tech, amenities or availability
- Places most importance on area/neighbourhood, amenities and services in the building, transport connections



Established & Expanding

Age 46-64

- Aged between 46 and 64 years old
- Looking to either upsize (36%) or downsize (35%)
- Want an apartment, and it must have an outdoor space (55%), or a penthouse (16%)
- Want a second property for investment purposes (long-term rent, 12%) or need to move to another city (11%)
- Will mostly use profits from the sale of their previous home to finalise the purchase (24%)
- The biggest obstacle to buying would be to have an imbalance between cost and quality of the property (52%)
- Willing to sacrifice space (35%) or to move to a less central location (16%)
- Places most importance on area/neighbourhood, transport connections, amenities and services in the neighbourhood



Next Chapter Living

Age >64

- Aged 65 and over
- Wish to downsize (43%)
- Want an apartment, and it must have an outdoor space (64%) or a penthouse (27%)
- Want a second property to unwind and recharge (23%) or to stay close to their kids and nephews (15%)
- Will mostly use personal wealth and resources to finalise the purchase (38%)
- The biggest obstacle to buying would be uncertainty in delivery timing (38%) and/or to have an imbalance between cost and quality of the property (33%)
- Willing to sacrifice space (12%) or to move to a less central location (31%), won't compromise on private parking spaces
- Places most importance on amenities and services in the neighbourhood, proximity to family, smart well-being home automation





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