

Hampshire & Isle of Wight

New Home Movers Survey 2023



Hampshire
County Council



FOREWORD

The Hampshire & Isle of Wight Home Movers Survey 2023 is a study which looks to identify the key characteristics and views of occupiers of new homes across the wider Hampshire & Isle of Wight area.

Previous home mover surveys were conducted in 2002 and 2010 of households moving into both existing and newly built homes within Hampshire, Portsmouth, and Southampton. The findings of the 2010 survey continue to be used in localised population forecasting and in policy development and to inform decision making.

This latest survey focuses on how newly constructed homes are occupied and experienced by households. We sought to find out whether newly constructed dwellings are occupied differently (e.g., household size) to existing dwellings, and to capture views about design and layout of properties. This survey has been undertaken by Hampshire County Council on behalf of Hampshire district councils and the three unitary authorities of Portsmouth, Southampton, and Isle of Wight. Thanks are due to the Hampshire & Isle of Wight councils for assisting with the formulation of the survey, and specifically to the working group who also assisted with preparing this report. Lastly, and most importantly, thanks are due to the individuals who completed the survey.

Finally, all references in this document to 'Hampshire & Isle of Wight' should be interpreted as meaning the combined administrative area of Hampshire County Council, Portsmouth City Council, Southampton City Council, and Isle of Wight Council.

If you have any questions or comments about this document, please contact Hampshire County Council's Spatial Planning Team via email:

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CONTENTS

Foreword 3

Executive Summary 5

SECTION 1

Introduction 6

SECTION 2

Methodology..... 8

SECTION 3

Validity of the Results 10

SECTION 4

Results 12

SECTION 5

Comparison with 2021 Census.....50

SECTION 6

Conclusion58

Appendix A - New Build Home Movers Survey..... 60

EXECUTIVE SUMMARY

The Home Movers Survey 2023 was sent to 12,915 households with a total of 985 questionnaires returned to Hampshire County Council representing an overall response rate of 7.6%. However, due to the survey concentrating on newly built dwellings, there were invariably areas across Hampshire & Isle of Wight where less development had occurred over the preceding years. This led to variations in the number of surveys sent out and the number of responses received across the area.

The results show that nearly three quarters of those that moved into new properties were owner-occupiers, with Southampton the only authority with less than half being owner-occupiers.

The majority of new home movers who responded to the survey moved into a detached or semi-detached property of three bedrooms or more as opposed to smaller houses and flats.

The majority of new home movers had previously owned a property. Slightly under half were two person households. The majority of those moving into new homes were a couple or a couple with young children.

A substantial proportion of new homes with three or more bedrooms were being occupied by two person households.

The highest proportion of new home movers were aged 30-34, followed by those aged 25-29. Those aged 75 and over were the least likely to move into a new home according to the survey findings.

The survey also looked to understand where home movers had moved from and about workplace locations.

Most home movers had moved from within Hampshire & Isle of Wight; and of those the majority had moved from the built-up areas around the south of Hampshire and the main towns and cities within Hampshire.

Of those home movers that had moved from outside Hampshire, the majority had moved from neighbouring counties such as Surrey, and also from the Greater London area.

For those home movers that travel to work for at least part of the time, under a third worked in the same local authority area as they lived in, with approximately a third working outside of Hampshire.

INTRODUCTION

- 1.1 The most recent Home Movers Survey data available to planning teams across Hampshire & Isle of Wight was from 2010 and this survey covered only the Hampshire area, including Portsmouth and Southampton. The survey also included new home movers of existing and new build properties.
- 1.2 In the last decade a total of 66,717 additional dwellings were built in Hampshire & Isle of Wight, with build rates and sales rates fluctuating during this period. Therefore, a need was identified to prepare a new updated Home Movers Survey. The survey aims to help understand key characteristics and views of occupiers of new housing across Hampshire & Isle of Wight to inform future approaches to the provision, design, and mitigation of new housing.
- 1.3 The Spatial Planning Team at Hampshire County Council undertook this survey, in partnership with the local planning authorities across the study area.
- 1.4 Initial consideration of the time period (2020-22) and geographic distribution used for the survey suggested that the survey scope was representative of recent developments across Hampshire & Isle of Wight, in terms of types and sizes of sites and the different tenures/sizes and types of dwellings built.
- 1.5 In undertaking a survey of the occupiers of these new build dwellings sampled, there was a particular interest in understanding the following key areas:
- 1.6 Household characteristics – including numbers of people, ages, type of households (e.g., family or single person), economic activity.
- 1.7 Previous home – location, reasons for leaving.
- 1.8 New homes – location, tenure, reasons for choosing, location of normal place of work, does property meet current requirements etc.
- 1.9 Therefore, this report collates information regarding people within Hampshire, Portsmouth, Southampton, and Isle of Wight who moved into a new home which was built between 1 April 2020 and 31 March 2022. It explores where they previously lived, their reasons for moving, the type, tenure and size of their new home, and their satisfaction with it. This insight into the type, size and tenure of properties changing hands, and the new occupiers' origin, household size and satisfaction will assist population forecasting and the formulation of new planning policies.

1. Ipsos MORI national survey for the Nationwide Building Society in 2021

- 1.12 The English Housing Survey for 2021 to 2022² found that owner occupation remains the largest housing tenure in England, representing 64% of all households. With 35% of all households being outright owners. Among outright owner households, 64% had a retired household reference person.
- 1.13 The report goes on to mention that in 2021-22, 38% of first-time buyer households were couples without

2. English Housing Survey 2021 to 2022: headline report - GOV.UK

dependent children, 24% were couples with dependent children, 29% were one person households. The remainder were multi-person households and lone parent households at 6% and 3% respectively.

- 1.14 The Hampshire & Isle of Wight new homes movers survey allows planners and housing officers to compare the more local insight with national surveys such as these.

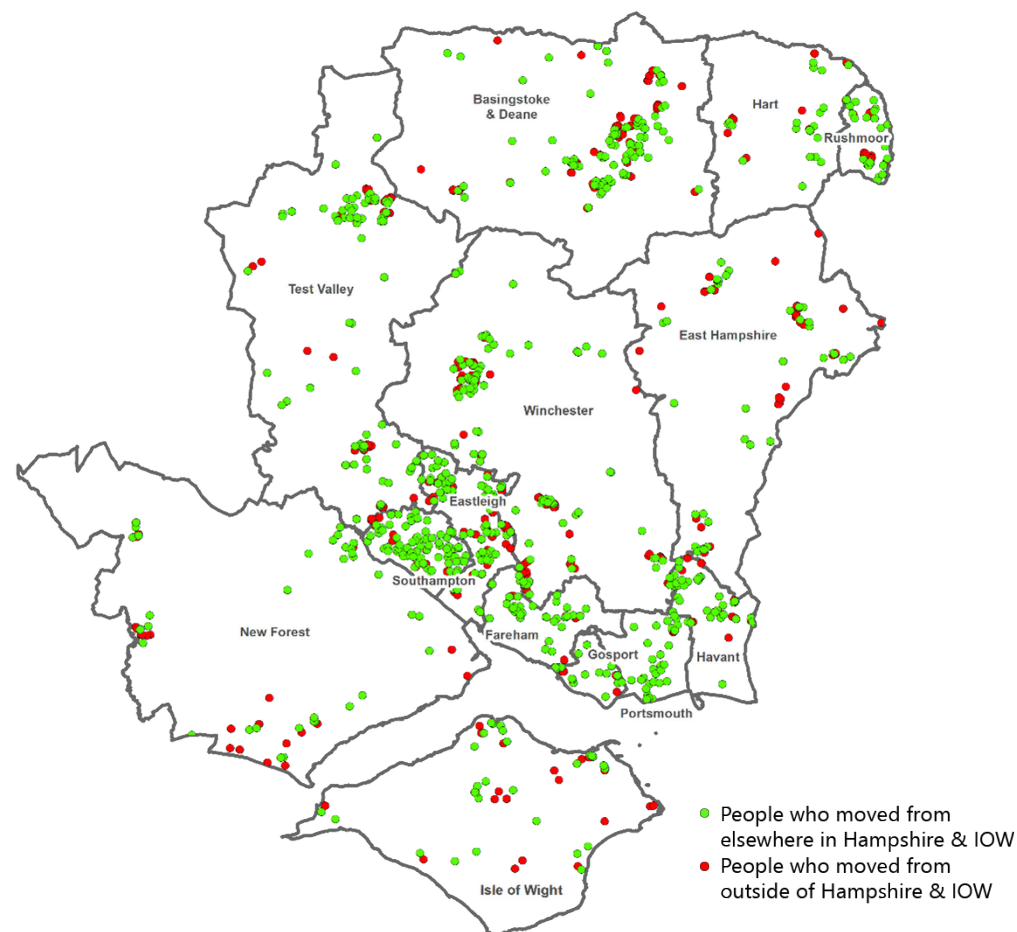


Figure 4.3 – The location of new build residents in Hampshire & Isle of Wight (from survey responses). Sample size: 1,100.

4.2 Overall Picture:

- The survey indicates home movers have mainly moved from within the UK, particularly the South and London.
- A high proportion have moved from within Hampshire and adjacent authorities.
- Only a few respondents have moved from overseas.
- Of those home movers that have moved from elsewhere in the UK, the highest numbers have moved from both Greater London and the Surrey area.
- A large proportion of home movers that have moved from within Hampshire & Isle of Wight have moved from the south of the county and the built-up areas and cities, in particular Southampton.

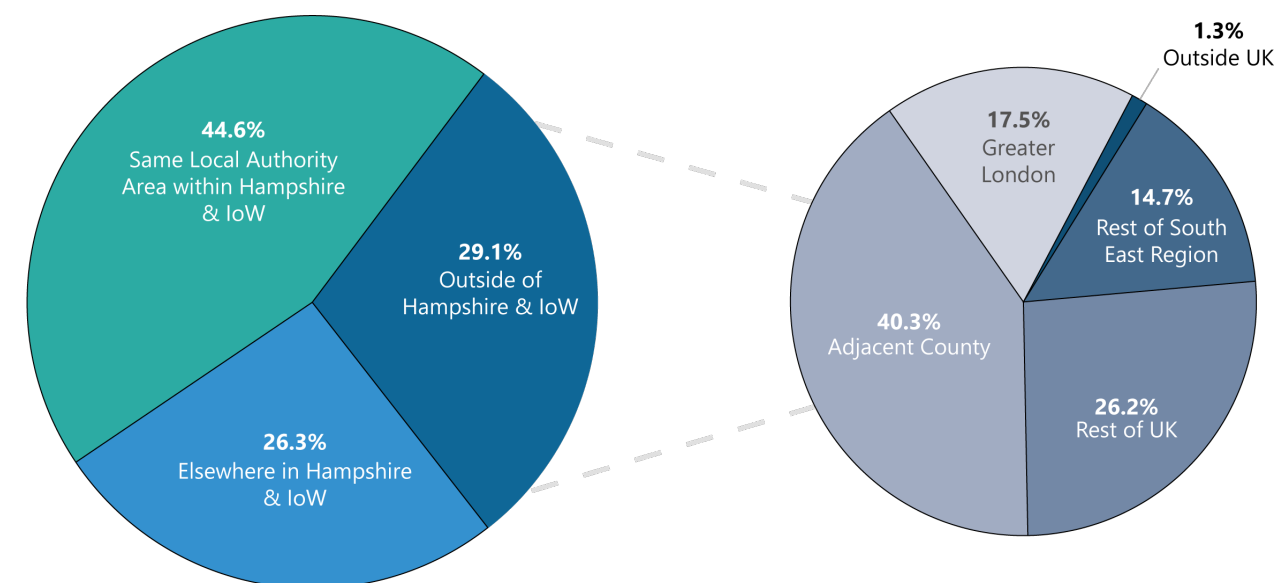


Figure 4.4 - Previous residence of new build residents now living in Hampshire & Isle of Wight new build homes. Sample size: 1,100.

4.3 Overall Picture:

- 44.6% of home movers have moved within the same local authority area within Hampshire & Isle of Wight and 26.3% have moved from elsewhere within Hampshire & Isle of Wight.
- 29.1% have moved from outside Hampshire & Isle of Wight. Of those who have moved from outside Hampshire & Isle of Wight, most moved from an adjacent county, with others moving from London and the rest of the southeast region. There were very few moving from outside of the UK.
- The trend for moving out of London has been noted by other research including work undertaken by Experian⁶, which showed that in some areas of London over 30% of net moves were to outside of London.

4.4 Key Findings for Local Authority Areas:

- All residents of new build homes that previously lived on Isle of Wight still live there; no residents moved from the Island to new build homes elsewhere.

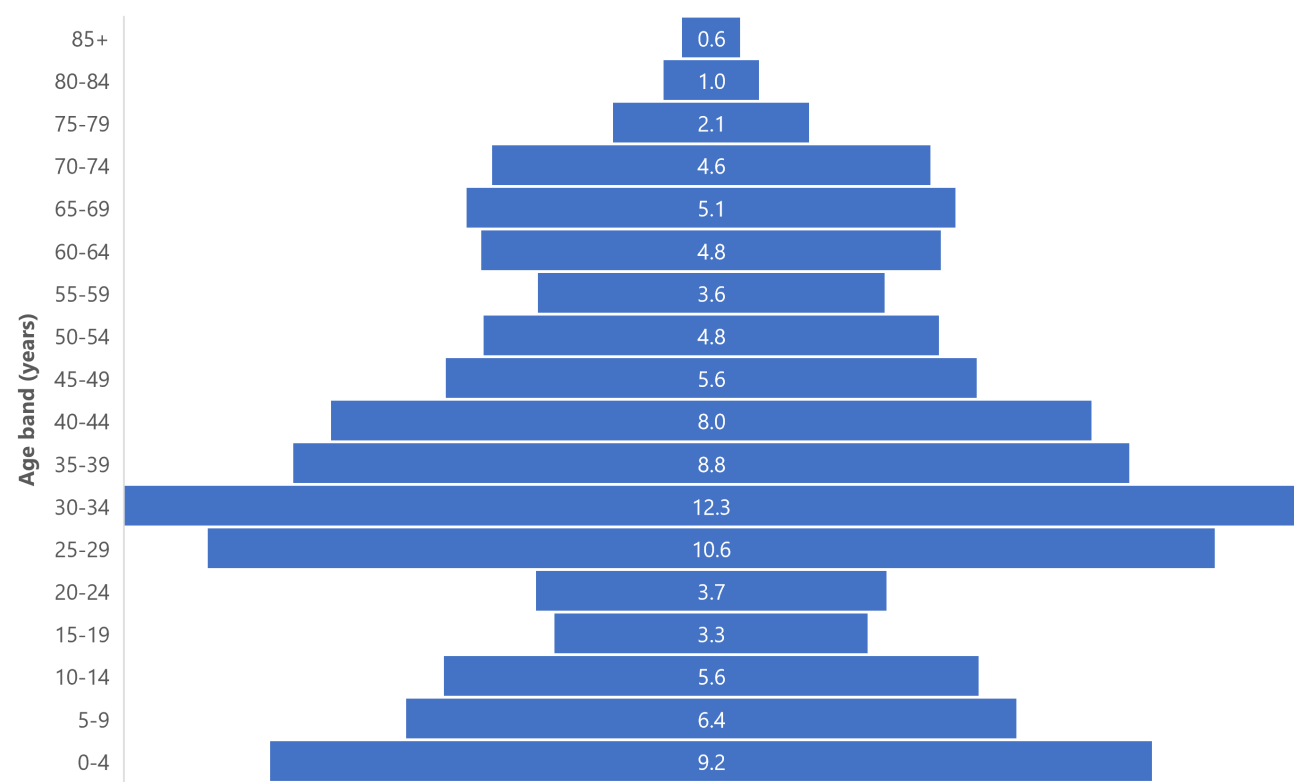


Figure 4.5 - All new build properties: Age of home movers (percentage). Sample size: 2,283.

4.5 Overall Picture:

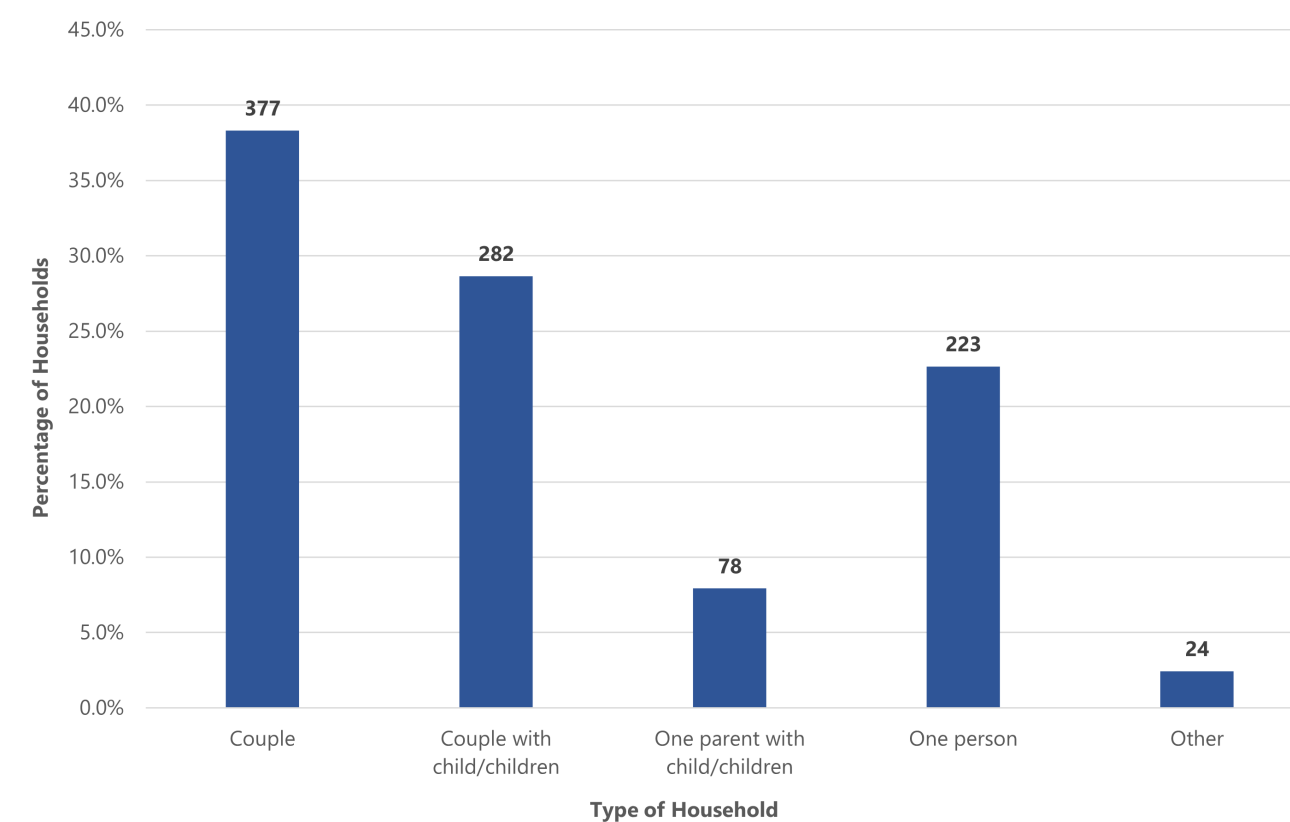
- The population pyramid shows the highest percentage of home movers were aged between 30-34 (12.3%), followed by those aged 25-29 (10.6%), and then 0-4 years-olds making up 9.2%.
- Those aged 75 and over made up the smallest percentage of new home movers.

4.6 Key Findings for Local Authority Areas:

- The highest percentage of 0–14-year-olds were found in Eastleigh (24.5%) and Winchester (24.7%). In contrast, Gosport had a low percentage in this age group (4.4%).
- Southampton and Rushmoor had a large proportion of 30–34-year-olds with 21.3% and 19.8% respectively.
- Isle of Wight and New Forest had the highest percentage of home movers aged 55 and over, at 51.9% and 41.5% respectively.
- These findings correlate with housing market analysis undertaken for New Forest⁷ and Isle of Wight⁸, which indicates that the authorities have a higher-than-average proportion of older people.

7. New Forest Strategic Housing Market Assessment

8. Isle of Wight Strategic Housing Market Assessment



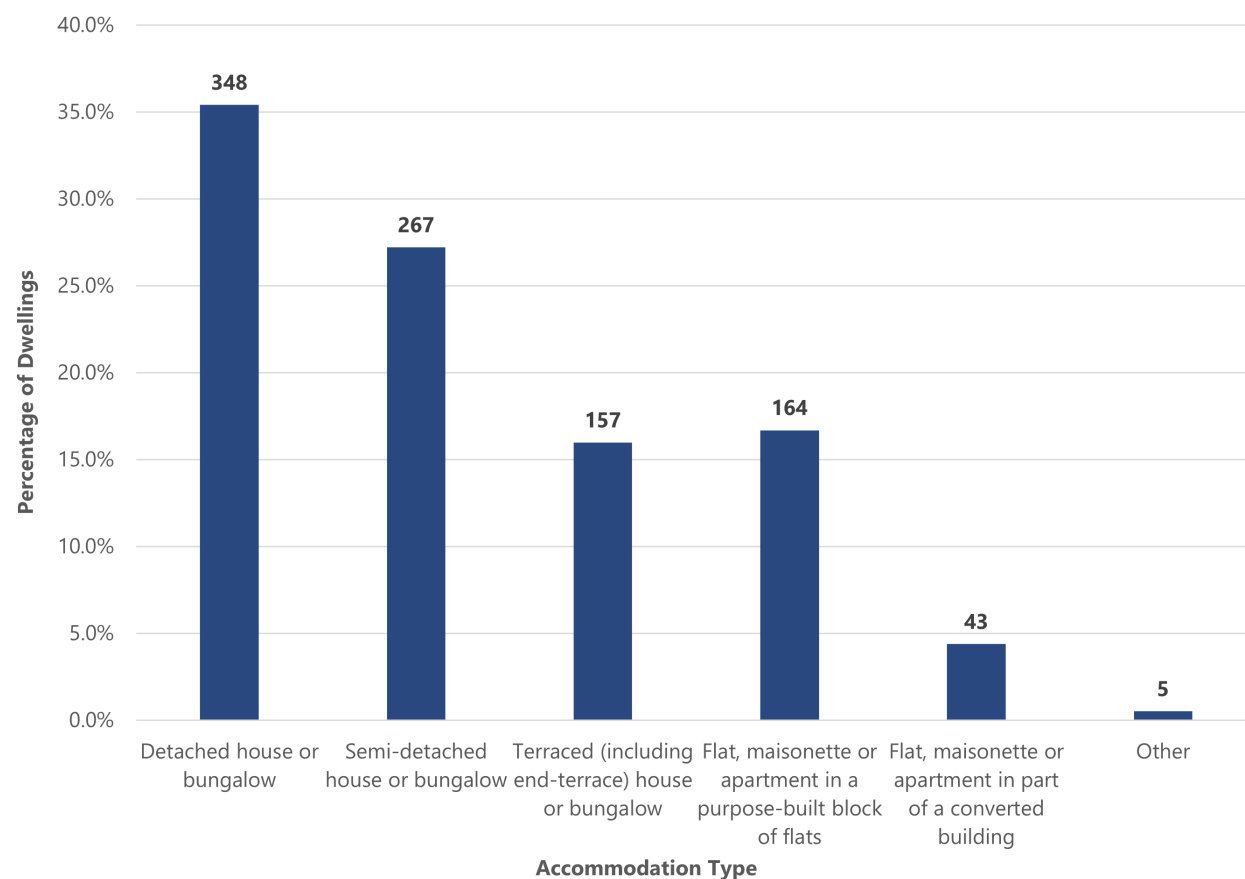


Figure 4.7 – All new build properties: Accommodation type (survey responses). Sample size: 984.

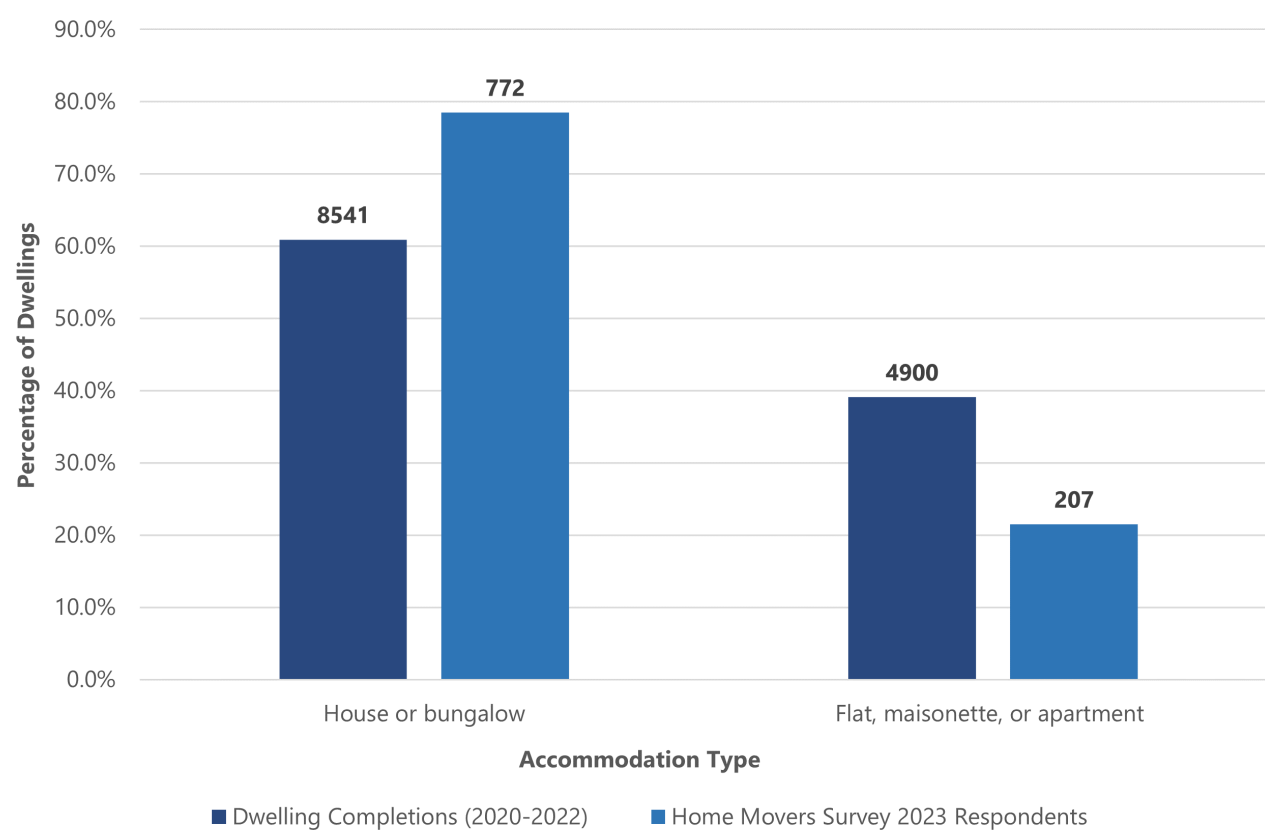


Figure 4.8 – Accommodation type for dwelling completions (2020-2022) and the Home Movers Survey (2023). Sample size: 13,441 (Dwelling Completions 2020-2022 *Figure prior to matching with new addresses) 984 (Home Movers Survey 2023)

4.9 Overall Picture:

- The survey findings indicate new home movers mainly moved into a house or bungalow (78.9%) compared to a flat, maisonette, or apartment (21.1%), with the majority moving into a detached (35.4%) or a semi-detached (27.2%) house or bungalow. This is an increase in those moving into a detached dwelling from the 2010 survey findings (27.3%) and a decrease in those moving into flats from the 2010 survey (26.5%). As previously noted, the 2010 survey included home movers to existing and new dwellings and did not include Isle of Wight. Therefore, the differences between this survey and the 2010 survey could in part be explained by the differing properties sampled and the inclusion of Isle of Wight.
- More home movers moved to a flat, maisonette or apartment in a purpose-built block of flats (16.7%) than to a flat, maisonette, or apartment in part of a converted building (4.4%).
- 'Other' included properties such as coach houses.
- When comparing the dwelling completions (2020-2022) to the home mover's findings, there was a lower proportion of houses and bungalows built compared to the proportion of respondents living in houses or bungalows and there was a higher proportion of flats built compared to respondents living in flats. Therefore, the respondents do not necessarily reflect what was built.

4.10 Key Findings for Local Authority Areas:

- The survey findings indicate Southampton had the highest percentage of home movers moving into flats (65.7%), with the majority being in a purpose

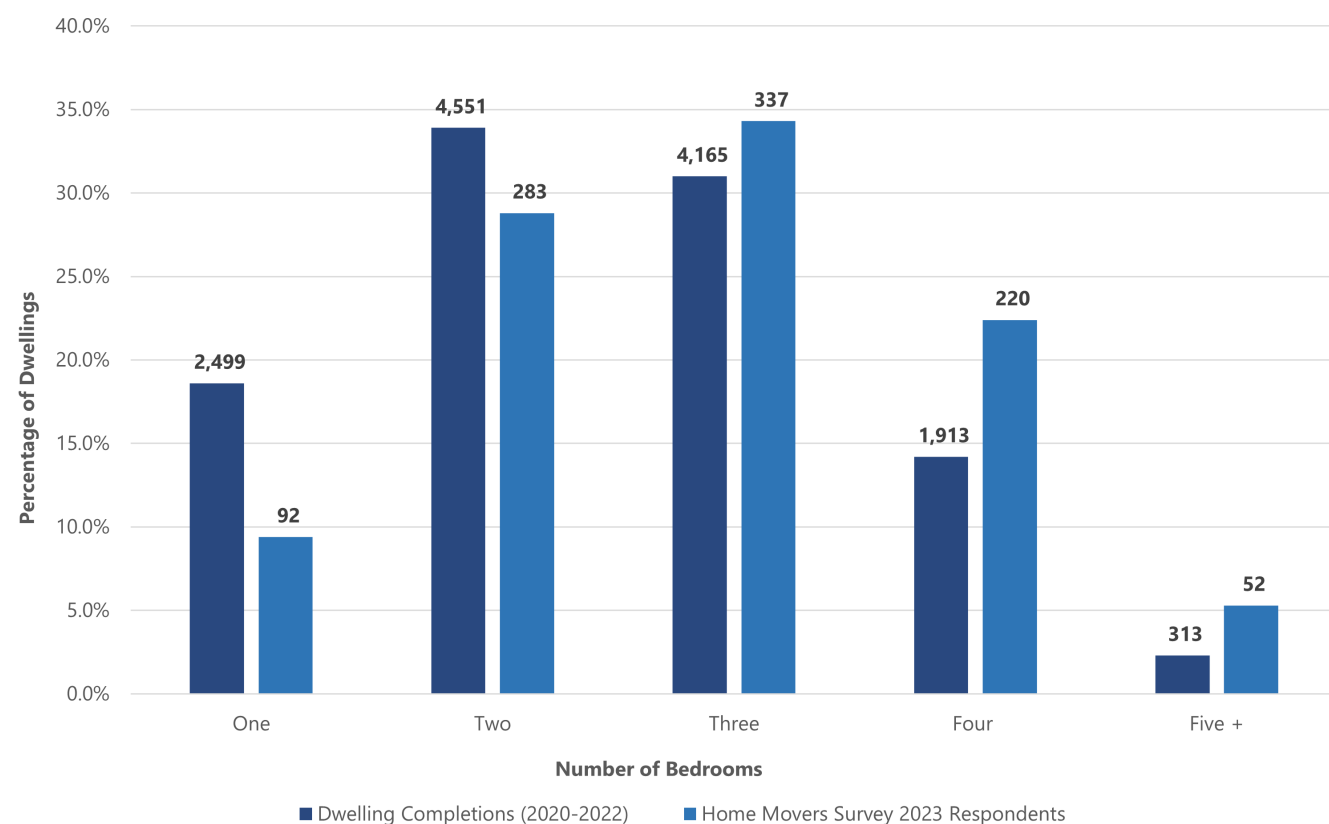


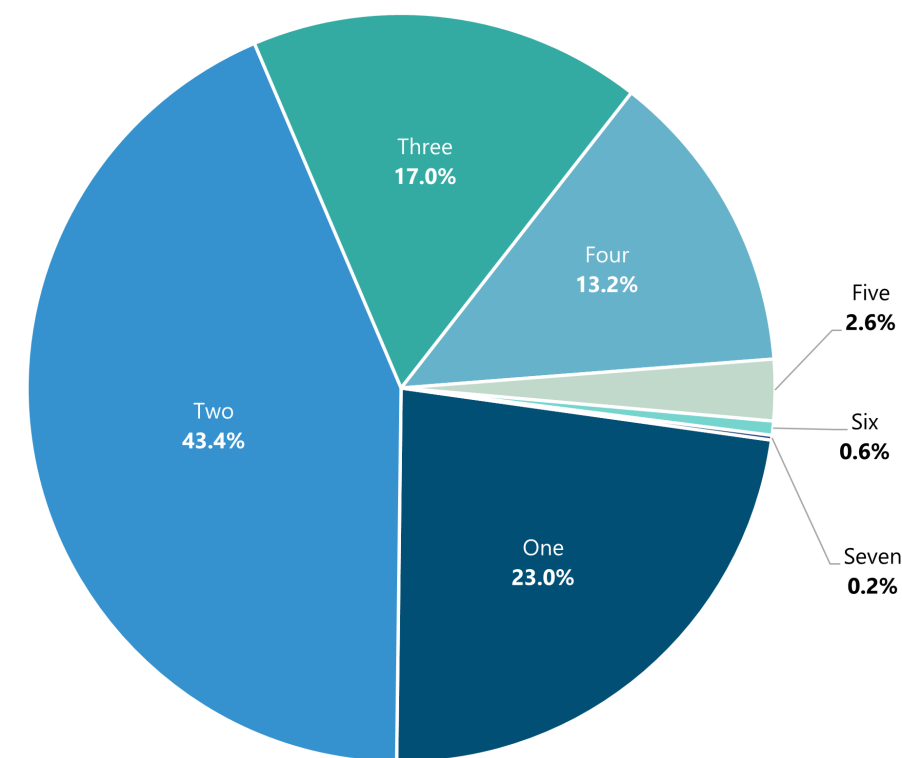
Figure 4.9 – The size of the property for dwelling completions (2020-2022) and the Home Movers Survey (2023). Sample size: 13,441 (Dwelling completions 2020-2022), 984 (Home Movers Survey 2023).

4.11 Overall Picture:

- Survey findings indicate two- and three-bedroom properties were the most popular size of dwelling amongst Home Mover Survey responses, with 28.8% and 34.3% respectively. This was the same trend as shown by the 2010 survey, showing very little change.
- 22.4% of home movers moved into a four-bedroom property. This was higher than the 2010 survey when the figure was 16.1%.
- Five bedroom or more properties made up the smallest percentage (5.3%) which was higher than the 2010 survey (2.8%).
- One-bedroom properties made up 9.4% which was lower than the 2010 survey with 17.5%.
- When comparing the dwelling completions (2020-2022) to the home mover's findings, there were a higher proportion of one- and two-bedroom properties built compared to the proportion of respondents in one and two bed properties and a lower proportion of three-, four-, and five-bedroom properties built compared to the proportion of respondents in three-, four- and five-bedroom properties.

4.12 Key Findings for Local Authority Areas:

- Portsmouth was the only local authority area with a respondent living in a new build studio flat.
- Hart had a large proportion of one-bedroom dwellings, whereas Gosport and Southampton had a greater proportion of one- and two-bedroom dwellings.
- Gosport's largest dwelling had three bedrooms.
- East Hampshire had the greatest proportion of four- and five-bedroom dwellings.



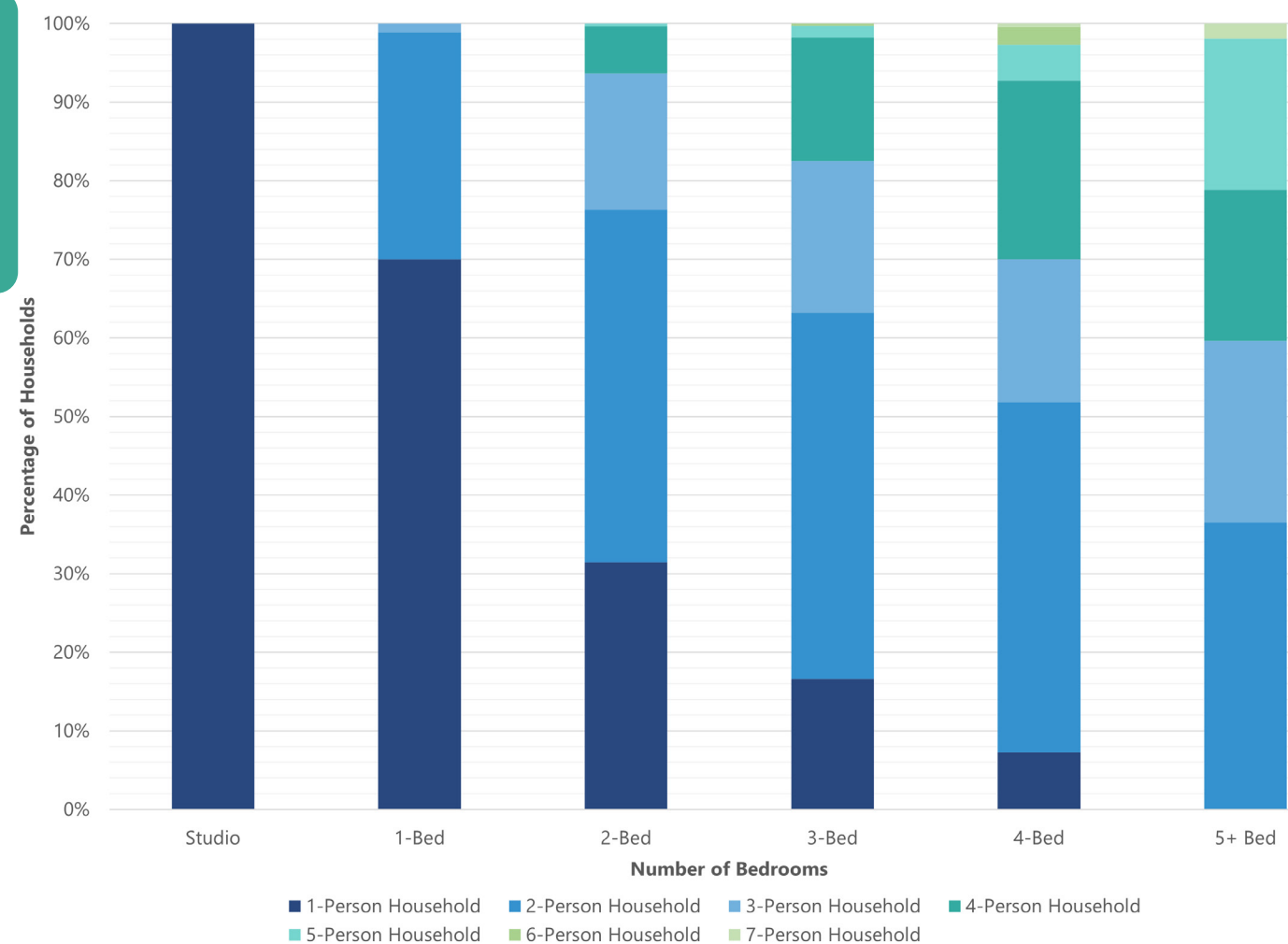


Figure 4.11 – All new build properties: Household and property size (survey responses). Sample size: 984.

4.15 Overall Picture:

- In Hampshire & Isle of Wight the size of the property generally correlated to the size of the home mover's household.
- However, a substantial proportion of dwellings with three or more bedrooms were occupied by two person households, which is described as under-occupation⁹.
- 70% of one-bedroom properties were occupied by one person with a further 28.9% by two person households. Only 1.1% were occupied by three person households, suggesting they are mainly being occupied by households appropriately sized for the property.

4.16 Key Findings for Local Authority Areas:

- Both East Hampshire and New Forest had over 40% of their two person households who responded living in four-bedroom properties (46.2% and 43.2% respectively).
- The two households with seven people were in Southampton and Test Valley. The property

9. Census 2021 – An occupancy rating of:

- -1 or less implies that a household's accommodation has fewer bedrooms than required (overcrowded)
- +1 or more implies that a household's accommodation has more bedrooms than required (under-occupied)
- 0 suggests that a household's accommodation has an ideal number of bedrooms

in Southampton was classified as having more than five bedrooms but the property in Test Valley had four bedrooms.

- East

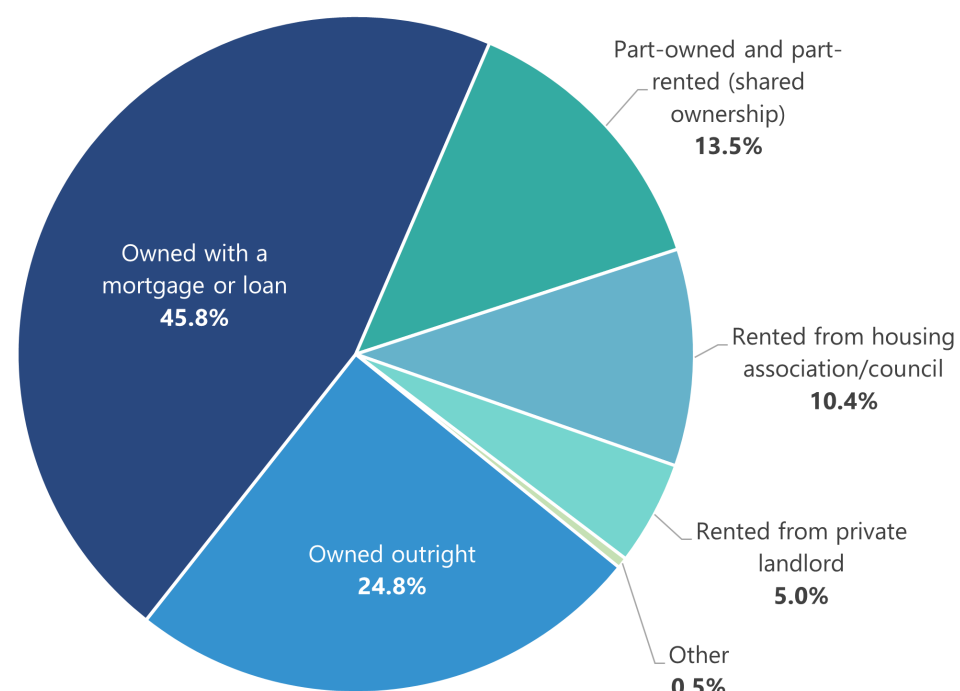


Figure 4.13 - All new build properties: Tenure of homes (survey responses). Sample size: 984.

4.19 Overall Picture:

- The survey indicates 70.6% of all home movers were owner-occupiers. This is a significant increase from the 2010 survey findings (53.3%) and a decrease from 2002 with 77.8% being owner-occupiers.
- 13.5% of homes were shared ownership and 10.4% were rented from a housing association/ council. This compares with new build completion data (2020-2022) which shows 31.3% of new builds were of affordable tenure (e.g., housing association/ council new build homes), which suggest the survey is slightly under representative of this dwelling tenure.
- A small proportion (5%) of home movers rented from a private landlord. This is a decrease from the 2010 survey when 26.2% of movers were in private rented accommodation, and a slight decrease from 8.8% in 2002. However, please note that the 2010 survey covered home movers moving into new and existing homes and therefore the data is not directly comparable. There have also been changes in buy to let mortgages and changes to tax incentives for buying investment property.

4.20 Key Findings for Local Authority Areas:

- Isle of Wight and New Forest had a high percentage of movers who owned their property outright (i.e., 'cash buyers') or with a mortgage or loan at 87.8% and 79.2% respectively. These local authority areas also had the highest percentage of respondents aged 55+, which could help to explain this.
- Southampton had the smallest proportion of home movers that owned their property outright or with a mortgage or loan (48.6%).
- Southampton had the highest proportion of home movers that rented their new property (34.2%).
- There were no survey responses from those in new homes in Gosport, Isle of Wight or Portsmouth that were rented from the housing association/council. This is not unexpected due to relatively few affordable dwellings built in these authorities over the period.

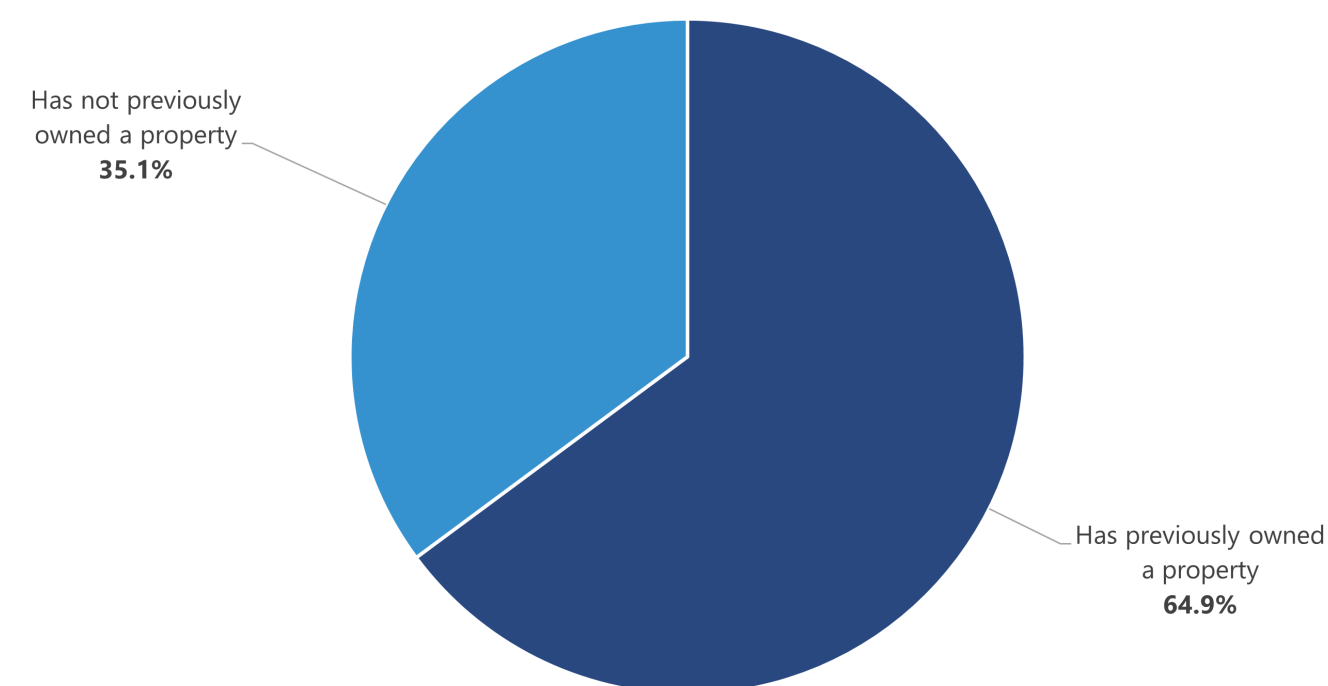


Figure 4.14 - All new build properties: At least one person per household having previously owned a property (survey responses). Sample size: 828.

4.21 Overall Picture:

- The survey results show nearly

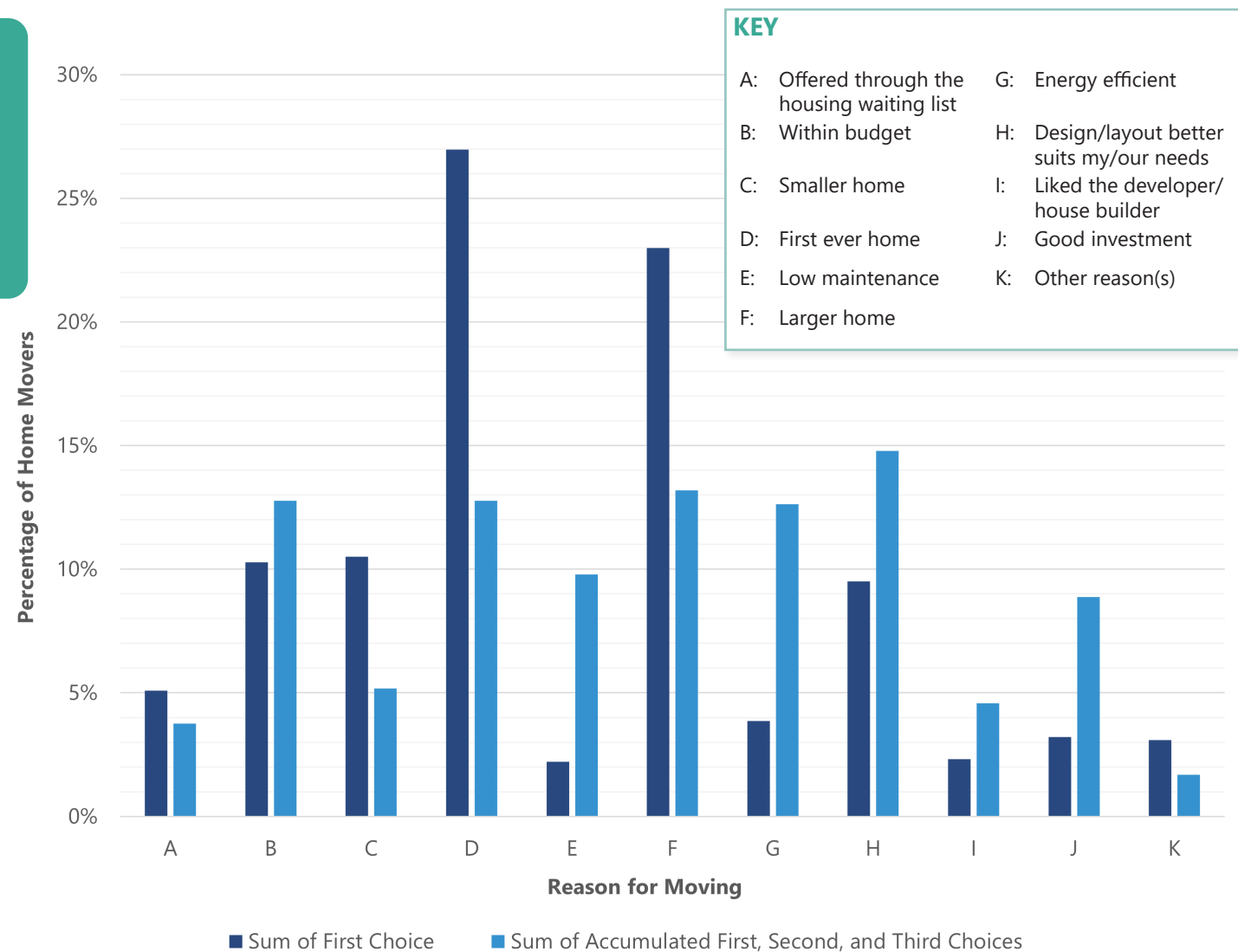


Figure 4.16 - Survey responses stating reasons for moving to the new build home itself. Sample size: Sum of first choice only (905), sum of accumulated first, second, and third choices (2,319).

4.25 Overall Picture:

- When taking the first choice only, the most popular reason for moving due to the property itself was moving into a first ever home (26.8%), followed by moving into a larger home (22.9%) (also described as up-sizing).
- When considering home movers top three choices for moving, there was a broader and more even split across the options. The design/layout better suiting needs was the most popular reason, followed closely by moving into a larger home, the home being within budget, moving into a first ever home, and the home being energy efficient.
- Home movers liking the developer/house builder and the house being offered through the housing waiting list were some of the least important reasons for moving to a particular property.
- Very few home movers had low maintenance as their first-choice reason for moving, but a high number placed it in their top three choices. This was similar for the home being energy efficient and it being a good investment.
- When considering how many reasons respondents chose (up to a maximum of ten reasons listed), 52.6% only chose three, with 84.5% choosing up to five reasons.

- Other reasons included better parking, being able to self-build, personal circumstances, having a garden, having extra care support, to avoid being in a chain and wanting a new build property.

4.26 Key Findings for Local Authority Areas:

- The survey indicates that most local authority areas had the new home being their first ever home as the top reason for moving. However, in

