University of Exeter | Institute of Cornish Studies

Entrepreneurial Futures
Innovation Research Culture

New Household Survey 2024-25
Arhwithrans Mayni Nowydh 2024-25

Social and Economic Research Unit
Institute of Cornish Studies, Exeter University.
Cornwall Council

Unsys Hwithrans Socyal hag Erbysek
Fondyans Studhyansow Kernewek, Pennskol Garesk-
Konsel Kernow

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Good Growth — Cornwall & Isles of Scilly Shared Prosperity Fund

Summary of Findings

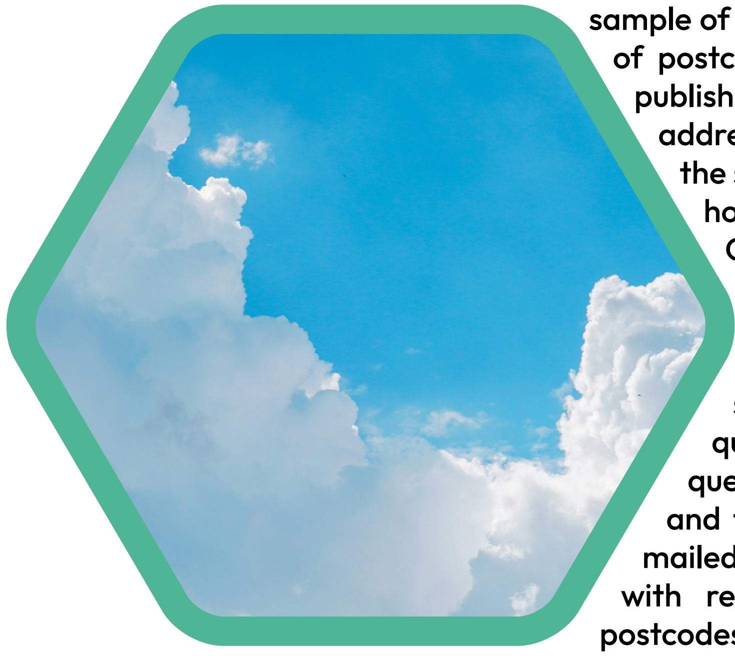
- People living in housing built less than ten years ago are less likely to own their property outright and more likely to be buying with a mortgage
- Those identifying as Cornish are less likely to be owner-occupiers.
- People aged 18–50 are slightly more likely to live in newer properties, while those aged 51–65 are equally likely to live in newer and older properties. In contrast, people aged 65 and older are much more likely to live in older properties.
- New households have fewer low-income earners (<£16K: 39%) than older households (47%). Middle to upper-middle incomes (£22-£40K, £41-£70K) are more common in new households (47% and 26%) compared to older households (37% and 17%). The highest income bracket (>£70K) also has a higher representation in new households (9%) than in older households (6%).
- Sixty-six per cent of all household moves were from previous addresses in Cornwall.
- Of those who moved into Cornwall, 32% moved from London or the Southeast, and 31% from the Southwest Region. There was little difference between new and older properties.
- Movers to Cornwall strongly prioritised environmental, rejoining family or retirement as motivations for moving. Work or business-related moves were not prioritised. There were no significant differences between those moving to new or older housing.
- Households that moved to Cornwall from outside the region were more likely to have no members in work (43%) compared with those who moved within Cornwall (25.5%).
- Over 50% of those moving into newer housing disagreed that their home was more expensive than they could afford, and 56% agreed they had no affordability issues. Additionally, 50% believed their new property was of better quality, and over 40% said it met their specific needs better, such as for disability or long-term illness.
- Twenty-nine per cent of all households reported at least one member had a travel to work distance of 20 miles or more and 26% ten to nineteen miles.
- More than eighty-eight per cent of all households reported their main means of transport to work was car and only 12% used public transport or other means. Additionally, 54% disagree that cycling was important to their household, yet only 26% were against having more cycle lanes.
- Sixty-five per cent said their household rarely used public transport and only 24% said they try to use public transport when they can, yet only 18% saw public transport in Cornwall as good and 44% saw rail services as poor. Forty-five per cent also saw public transport as too expensive.
- Attitudes towards local environment were very positive, with over 90% saying they valued green spaces and could easily access the countryside.
- Nearly 80% agreed green spaces should be priority in new developments.

1. Introduction

In 1986 Cornwall Council undertook a major housing survey[1], which sought to understand who was living in the large amount of new housing that had been built during the 1970s and 1980s[2]. Most of this housing was in the private sector and it was hypothesised that the residents of the newer housing were migrating to Cornwall from other regions of the UK. This was a time when Cornwall was beginning to experience a problem of housing need for local people[3]. Over thirty years later the housing need problem has grown into a crisis. In this research we have revisited this issue and sought to describe the housing and related circumstances, such as economic activity, where people moved from and their attitudes toward their housing and locality. In this study we compared those households living in newer housing, that is built within the last ten years, with those living in housing built more than ten years ago.

2. Rationale and Method

The research used a comparative method to compare the characteristics of those households living in housing built in the last ten years, with those living in housing built more than ten years ago. To establish where the former housing could be found, we used Land Registry data to identify those postcodes where 20 or more properties had been built in the last ten years. These postcodes thus yielded a sample of both new and old housing. The full list of postcodes can be found in the separately published appendices. Each residential address in each postcode selected formed the sample. That our sample included new housing was extensively checked using Google Street View.



The questionnaire was developed during the winter of 2023/24 and stakeholders were consulted on the questions to be asked. The resulting questionnaire was thoroughly piloted and tested during the spring of 2024 and mailed out to households in May-June 2024, with reminders sent to under-represented postcodes in July 2024. Respondents had the option of returning a completed paper copy of the questionnaire, using a paid return envelope, or could complete online, using a linking QR code or URL. Response rate varied across different questions but was mostly 938 responses.

The data from the current study is complex and nuanced. It does provide a comparative description of who lives in the newer housing, compared to older housing, and in some measures, there are important differences, but equally the data shows a somewhat different divide between those who moved into Cornwall, both into the newer and older housing stock, and the longer-term residents. These latter findings emerged as a result of the analyses and were not the intended initial focus of the research. They are, however, very important to understanding housing, and indeed its relationship to economy, in Cornwall.

In some of the analyses of older and newer households, for example attitudes to environment and transport issues there are few major differences between those living in newer or older properties. We have therefore reported the combined old and new household data. This 'smoothing' effect of the characteristics between older and newer properties is, we believe, attributable to three factors. Firstly, in more urban areas, there has been a number of affordable properties built, wherein the characteristics of the residents would differ markedly from those in 'open market' housing.

To some extent, we have been able to identify difference. The second characteristic is statistical significance. For the most part we have only reported statistically significant findings, but in some cases slight differences between the older and newer housing can be seen. If the sample was larger, then it is very likely these differences would become larger and more apparent. Thirdly, we took a 'cut-off' period of housing built between 2013 and 2023, for our newer housing sample. At least some of the postcodes, in our sample, also had developments of 20 or more properties built in the years immediately preceding our sample cut off. These households would have characteristics similar to our new household sample yet, of course, had to be counted in the 'older' part of the sample.

Please note that several variables used in this report have been recoded to enhance data consistency and mitigate the presence of small cell sizes in certain categories. Also, in most cases (except with values of .5) we have rounded up or down all percentages, so they may not always sum exactly to 100%. Statistical significance is not reported, though in a few cases (which we indicate) smaller values in the cells were not statistically significant. P-values are reported in the tables in the Appendices.

Further analyses, using multivariate statistical procedures, were conducted and these are reported separately in an Advanced Analyses Report. However, because it provides findings that amplify the standard analyses, one set of multivariate analyses are reported, in Section 11, those of cluster analyses of some key variables. Cluster analysis is a classificatory or taxonomic approach, whereby clusters (or groups) of similar entities are identified through statistical procedures.

3. Who lives in old and new housing?

3.1. Housing Type and Tenure

The first two tables describe the types of housing older and newer households live in. Table 3.1.1 compares dwelling types. Those living in both older and newer housing mostly live in houses, though this is rather more the case with the newer housing. The only large difference, between the groups, is that there are fewer newer households living in bungalows. These differences are what we would expect, given that most new properties built in recent years are houses, so this distribution is a function of the housing market and planning decisions.

Table 3.1.1. Dwelling Type

	A House	A Bungalow	A Flat	Other	N=
Built less than 10 years %	82%	7%	8.5%	2%	317
Built 10 years or more %	63.5%	24.5%	10%	2%	567

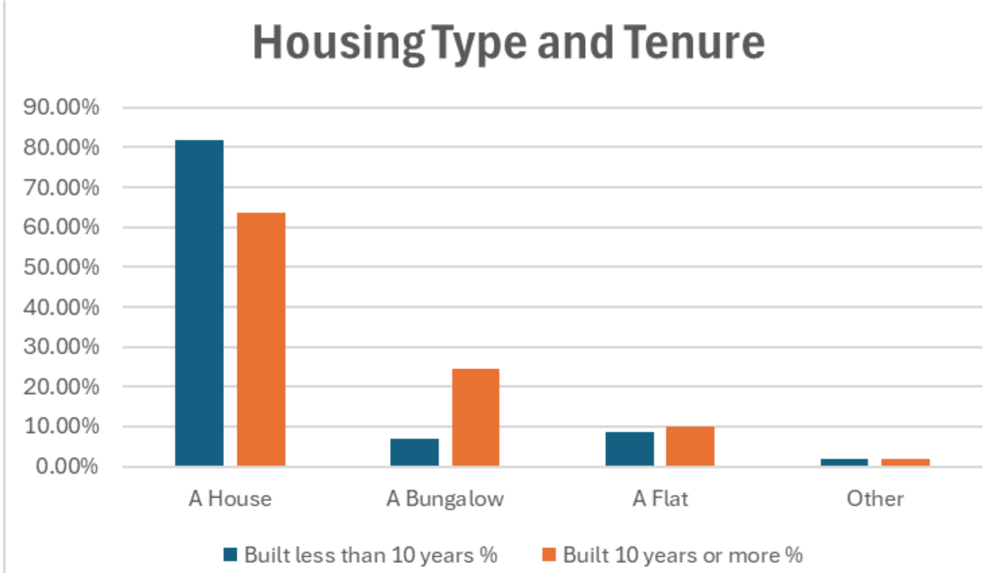


Figure 3.1.1. Dwelling types and property age

Table 3.1.2 describes the tenure type of new and older households. Both groups are overwhelmingly owner occupiers, though those in newer households are more likely to be buying with a mortgage. This partially reflects the 'more established' nature of the older housing. Cornwall has had high levels of owner occupation since the late 1970s. However, if the newer housing was primarily built to satisfy local housing need, we would expect numbers buying with a mortgage to be higher than it is, thus suggesting the newer housing may be satisfying demand from buyers further into their housing careers. They may be moving to larger or smaller properties and not in need of a mortgage. It should also be noted that there are comparatively fewer households renting the newer properties.

Table 3.1.2. Housing Tenure of Households in Newer and Older Housing

	Owned Outright	Owned With a Mortgage	Private Renting	Social Housing	Other	
Built less than 10 years %	42%	43%	3.5%	6%	5%	N= 311
Built 10 years or more %	59%	23%	12%	5%	1%	N= 563

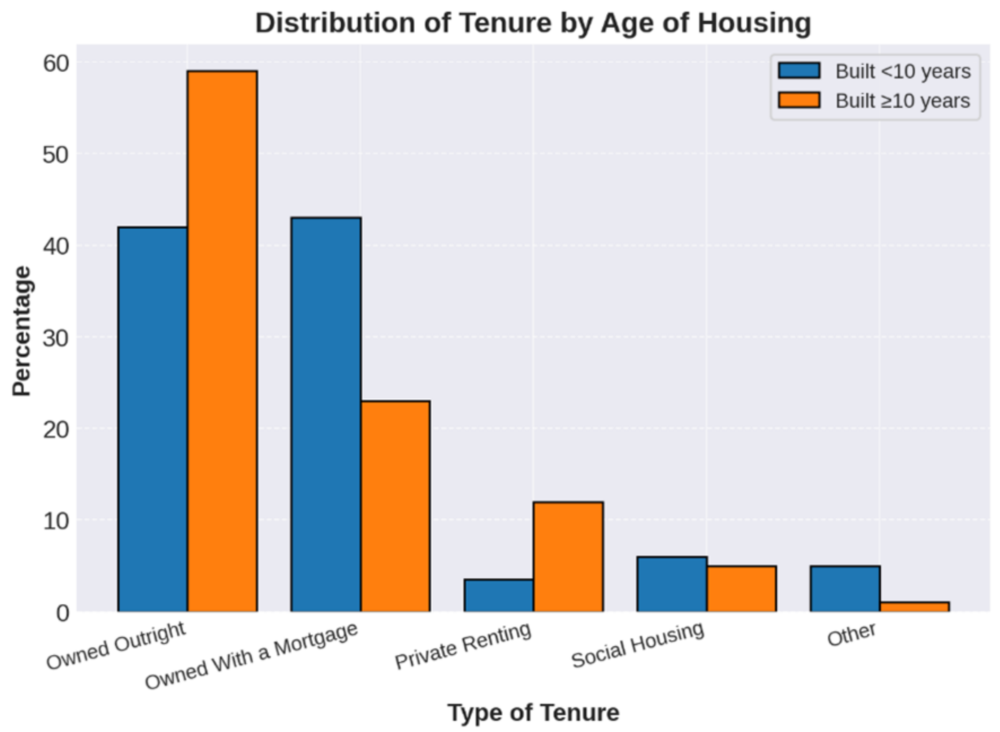


Figure 3.1.2. Housing tenure by property age

3.2. Ethnicity

Other studies have demonstrated that people who report their ethnicity as Cornish, in Cornwall, are more likely to experience poorer health outcomes and other forms of deprivation[4]. We wanted to see whether those who state their ethnicity as Cornish are equally represented in both newer and older housing. 'Cornish', as other ethnic categories, is self-reporting, with people of the same heritage sometimes selecting different categories. There are no viable alternatives to this method of measuring ethnicity. The standard Cornwall Council measure of ethnicity was used, but to achieve statistical significance in the sample, the categories were collapsed into Cornish, British and Other. Cornish included White, Black and Asian Cornish. Most surveys, in Cornwall, show those reporting Cornish ethnicity are around one third of the population. Given the self-selecting nature of the category, it is likely that a greater proportion of the population would have the same heritage as those who selected Cornish and indeed, in a study by Kerryn Husk, those selecting 'Cornish' in surveys were more likely to have higher educational qualifications. The 'other' category needs some care in interpreting, because of the small numbers. In Table 3.2.1 it can be seen Cornish-identifying individuals make up a smaller proportion of residents in newer housing (20%) compared to older housing (31%) and their presence in both is notably lower than British-identifying individuals. This suggests affordability or other structural barriers may be affecting their ability to purchase newer homes.

Table 3.2.1. Ethnicity Newer and Older Housing

	Cornish	British	Other	N=
Built less than 10 years %	20%	74%	6%	313
Built 10 years or more %	31%	66%	3%	558

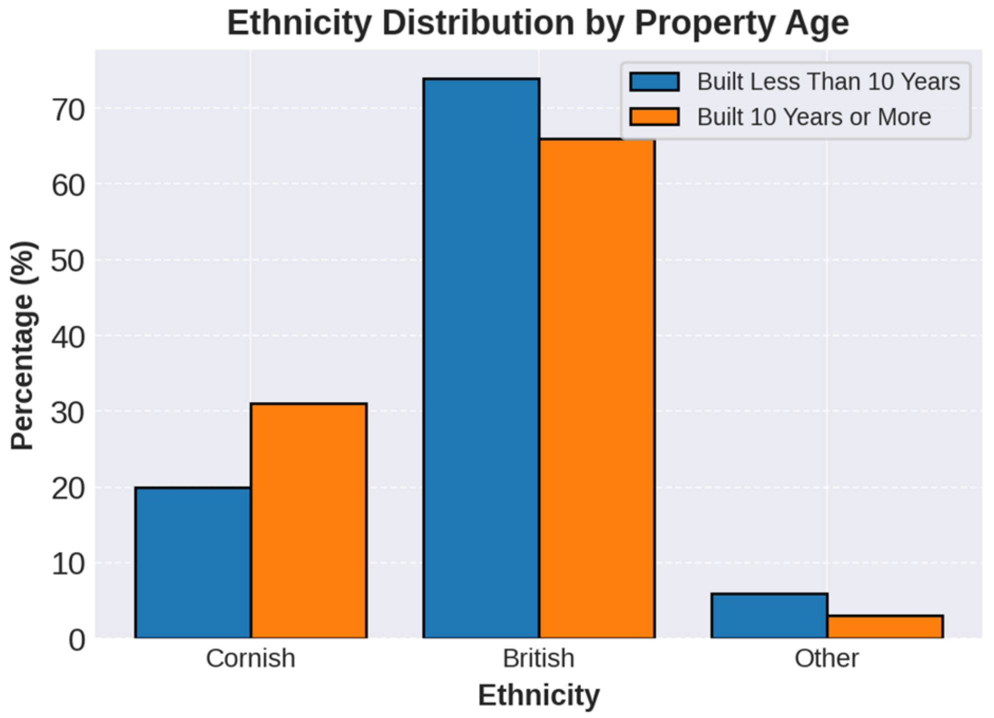


Figure 3.2.1. Ethnicity distribution by property age

Given that those selecting Cornish ethnicity comprise only around one third of the sample, it is unsurprising that they are underrepresented in each tenure type. This suggests affordability barriers or other structural challenges may be restricting their access to homeownership and rental opportunities in newer housing. In newer owner-occupied properties, the Cornish are drastically underrepresented at 19.5 per cent, compared to British at 75 per cent. Only 9% of privately rented newer properties are occupied by those who selected Cornish. In older properties over twice as many of those selecting British are in owner occupation, compared to Cornish.

Table 3.2.3. Ethnicity and Tenure within tenure type

Ownership Type	Property Age	Ethnicity	% within Property Age
Owned	Less than ten years	Cornish	19.5
		British	75
		Other	6
	More than ten years	Cornish	30
		British	67
		Other	3
			N= 711
Privately Rented	Less than ten years	Cornish	9
		British	82
		Other	9
	More than ten years	Cornish	30
		British	66
		Other	4.5
			N= 78
Rented from Housing Association	Less than ten years	Cornish	28
		British	61
		Other	11
	More than ten years	Cornish	41
		British	55
		Other	3
			N=47

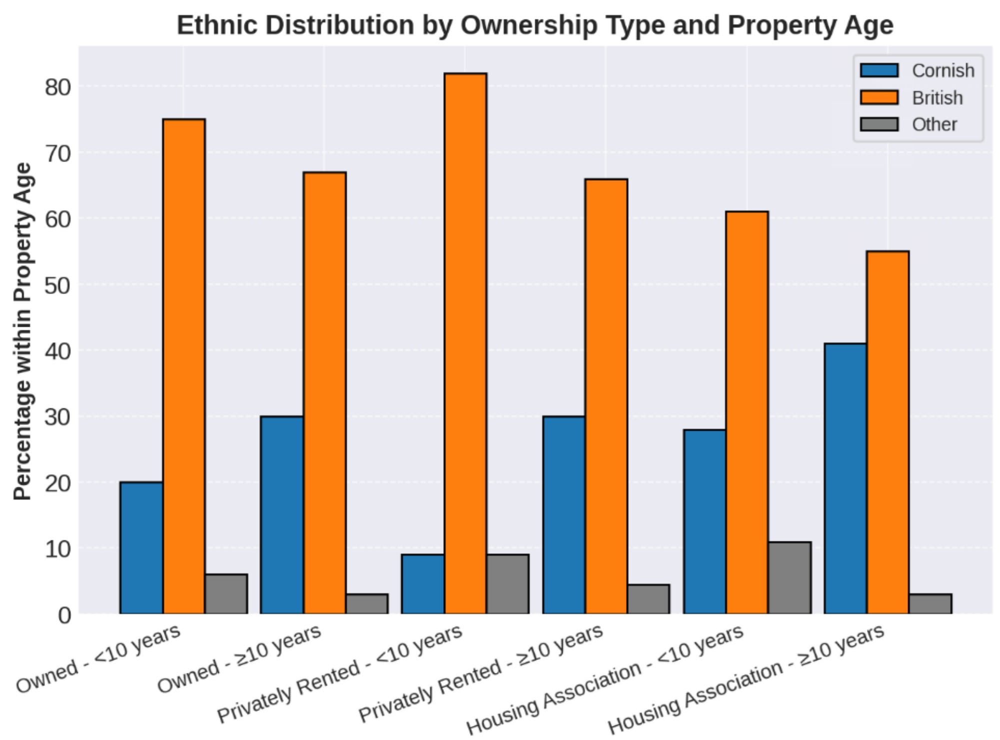


Figure 3.2.3. Ethnicity and property ownership by age

3.3. Age and household profile

We asked how many members of the household were in each age group (Table 3.3.1). The table illustrates the distribution of household ages across dwellings built less than 10 years ago and those built 10 years or more. Younger age groups, particularly under 18 (27%) and 18-35 (30%), are more prevalent in newer dwellings compared to older ones (18% and 17%, respectively). This suggests that newer properties may attract younger families or individuals at earlier life stages. For households in the 36-50 age bracket, newer and older properties show a closer distribution (32% and 20%, respectively). In the 51-65 age group, the distribution is equal across newer and older dwellings (34% each).

However, a significant shift is seen in the older than 65 age group, where older dwellings accommodate a much larger share, with 55% compared to 32% in newer dwellings. This distribution highlights a potential age-related segmentation in housing preferences or availability.

The age-related data are somewhat at odds with that of tenure, indicating differing characteristics. One interpretation might be that the newer less expensive housing is attracting people earlier in their housing career and are buying with a mortgage in 'affordable' properties (but see the caveat in 3.1.2 above), whilst the more expensive housing is attracting people further into their housing careers.

Table 3.3.1. Household ages

Under 18	Dwellings built less than 10 years	27%
	Dwellings built 10 years or more	18%
18-35	Dwellings built less than 10 years	30%
	Dwellings built 10 years or more	17%
36-50	Dwellings built less than 10 years	32%
	Dwellings built 10 years or more	20%
51-65	Dwellings built less than 10 years	34%
	Dwellings built 10 years or more	34%
Older than 65	Dwellings built less than 10 years	32%
	Dwellings built 10 years or more	55%

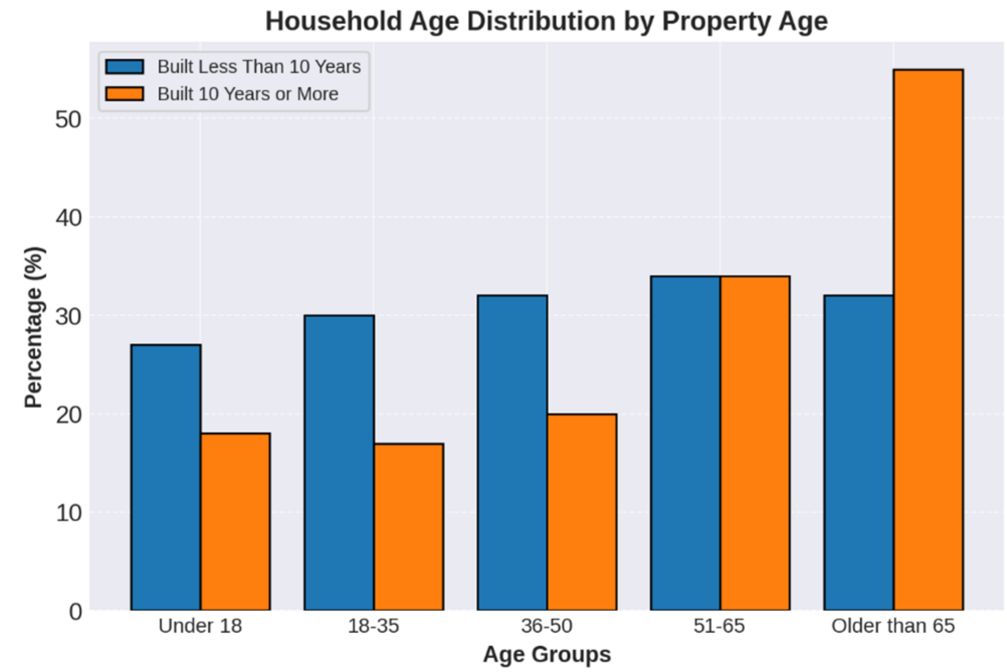


Figure 3.3.1. Household age distribution by property age

3.4. Moving within and from outside of Cornwall

In housing built less than 10 years ago, 69.5% moved from within Cornwall. In housing built 10 years or more 63% moved from within Cornwall. This finding needs some contextualisation, mainly because it includes all tenure types and affordable housing within owner occupation. We can control for the former (see 3.1.2 above), but the latter will be hidden in with 'buying with a mortgage'. It might be hypothesised that most moves to housing association or affordable housing, built in the last ten years, would be within Cornwall moves. A number of previous studies have examined the origins and motivations of those who moved into Cornwall. In our analyses, there were few statistically significant differences in either origins or motivations of those who moved into newer or older housing, but there were important findings in motivations to move more generally and these are reported below in the following tables.

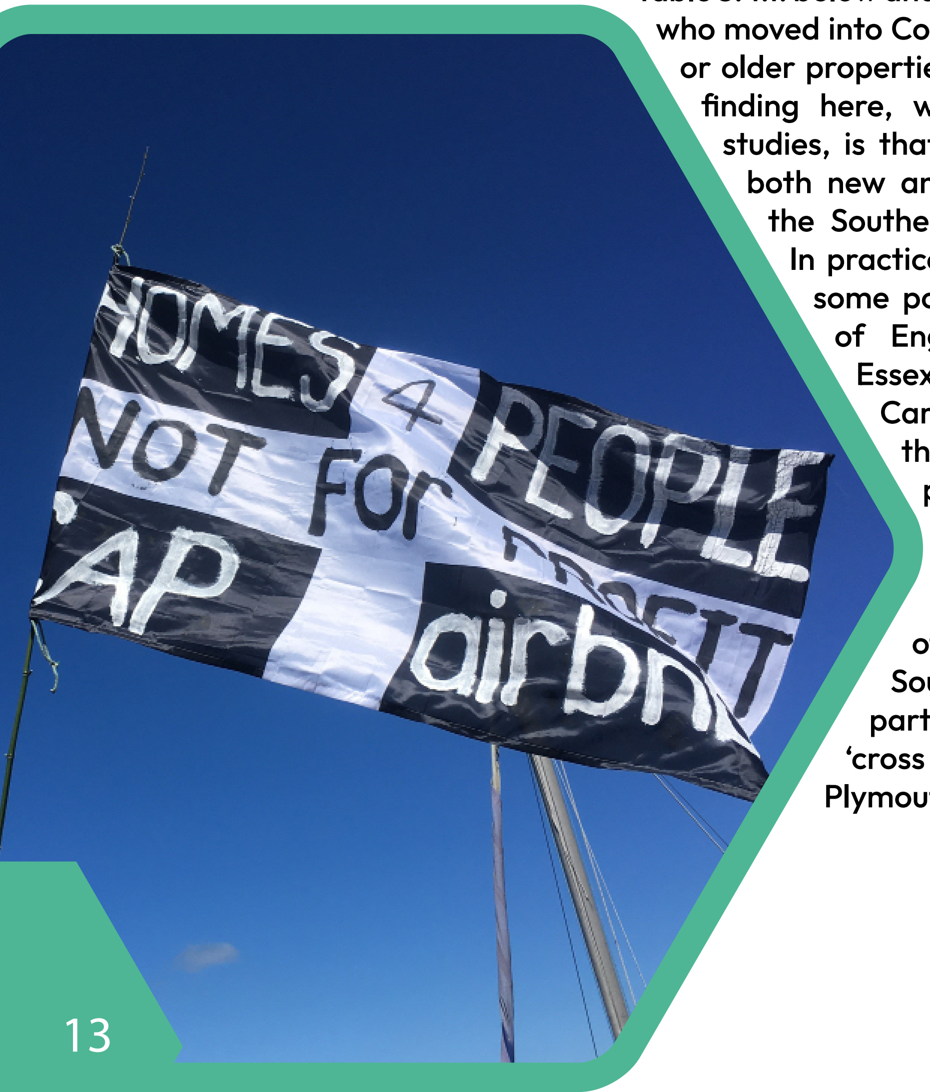


Table 3.4.1. below analyses the origins of those who moved into Cornwall, either into newer or older properties. The most interesting finding here, which supports previous studies, is that the origin regions, for both new and older properties, are the Southeast and the Southwest. In practice we should also include some post codes from the East of England region, such as Essex, Hertfordshire and Cambridgeshire, because they are effectively part of the Southeast property market. This would increase those moves from that part of England to 44%. The Southwest moves may be partly explained by short 'cross border' moves from Plymouth or West / North Devon.

Table 3.4.1. Origins of those who had moved to their address from outside of Cornwall (old and new housing)

Previous address	Less than 10 Years (%)	More than 10 Years (%)	Total (%)
East Midlands	4%	2%	3%
East	13.5%	7%	11%
London/Southeast	30%	35%	33%
Northeast	4%	2%	3%
Northwest	1%	6%	3%
Overseas	2%	3.5%	3%
Scotland	1%	1%	1%
Southwest	32%	29%	31%
Wales	1%	2%	2%
West Midlands	7%	11%	9%
Uncategorised	3%	0%	2%
N Respondents	96	85	181

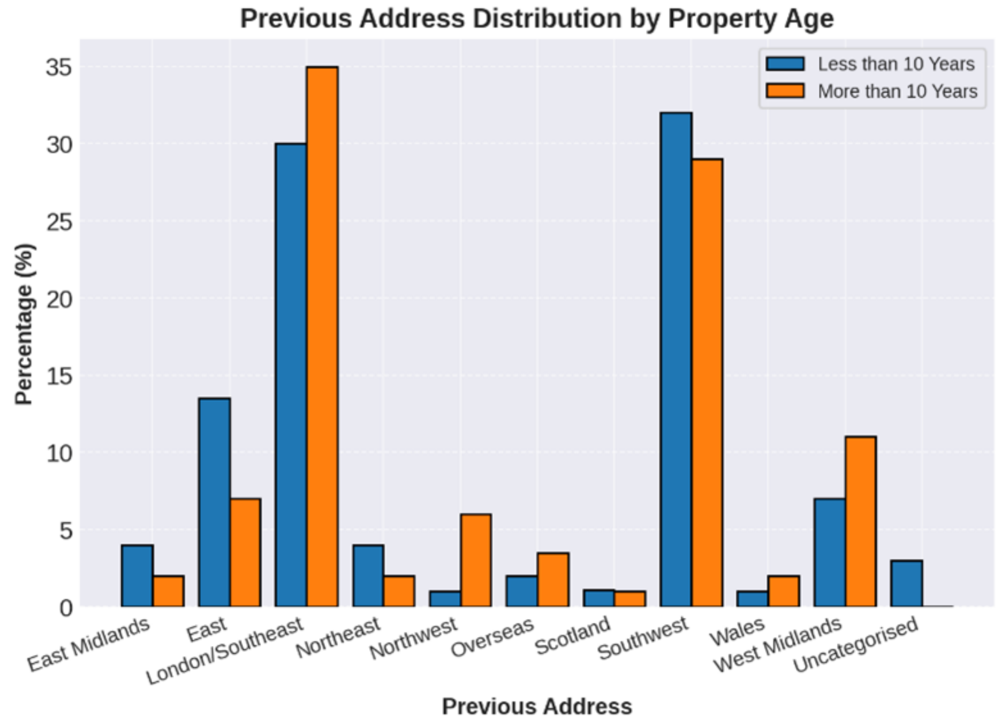


Figure 3.4.1. Previous address region by property age

Table 3.4.2 and 3.4.3 examines the motivations of those who moved to Cornwall and live in either older or newer housing. There were no significant differences between those in older or newer housing, in respect of motivations for moving. Respondents were asked to rank several motivations for moving, and these are reported in the first table.

In a further open-ended question, respondents were asked to say which was the most important reason for them to move. This is reported in the second of the tables. What is striking is that these findings almost exactly mirror other studies, some conducted as early as the 1980s (see section 9 below). The major conclusion is that, in the current study, in-migrants rank work related reasons last, whereas environmental quality, rejoining family and retirement are ranked first, second and third.

Table 3.4.2. The Reasons of Migration to Cornwall

Environmental Quality: Most respondents (64%) considered environmental quality as "Most Important," highlighting its significance in their decision-making. Only 4% rated it as "Least Important," indicating strong overall importance.

Rejoining Family: A substantial 41% deemed rejoining family as "Most Important," while 22% rated it as "Least Important." This shows a diverse prioritization of family ties across the sample.

Health Reasons: While 27% found health reasons "Moderately Important," only 13% considered them "Most Important." The responses suggest mixed perceptions of health-related factors.

Housing Less Expensive: Cost of housing was moderately considered, with 23% rating it as "Moderately Important" and only 15% viewing it as "Most Important." A significant 35% saw it as "Least Important."

Job Opportunities: Over half of the respondents (55%) rated job opportunities as "Least Important," signalling limited influence of employment factors in decision-making.

Bigger House: A notable 45% rated having a bigger house as "Least Important," whereas only 13.5% found it "Most Important," reflecting lower prioritization.

Start Business: Starting a business had limited appeal, with 78% rating it as "Least Important" and only 4% considering it "Very Important."

Retire: Retirement was seen as "Most Important" by 41% of respondents, while 29% considered it "Least Important," showing its relevance to a smaller but significant group.

Downsize: Downsizing was rated "Least Important" by 42% of respondents, with only 22% viewing it as "Most Important," perhaps highlighting its niche importance.

In these write in responses, moving for family related reasons were ranked first, followed by environmental reasons. The open-ended responses to this question have been categorized into distinct groups of migration reasons, as shown in Table 3.4.3. Respondents provided their most important migration reason, which aligns with the ranking question on migration reasons (Table 3.4.2). Additionally, some respondents mentioned other reasons beyond their top-ranked choice. As with the above ranking table economic reasons for moving were stated by only a few. The inescapable conclusion from these data is that migration to Cornwall is lifestyle/ family led, with economic motivations (to move to work or start a business) are much less important.

Table 3.4.3. Most Important Reason for Moving to Cornwall

Most Important Migration Reason	Frequency	%
Environmental Factors	22	20
Family-Related Reasons	31	28
Affordability and Housing	9	8
Job-Related Reasons	7	6
Lifestyle and Change	8	7
Health and Wellbeing	5	4.5
Retirement	13	12
Education and University	3	3
Other Personal Reasons	12	11
Total Responding to question	110	
Total Survey Respondents	938	-

The table summarizes the most important migration reasons as identified by respondents. Family-related reasons emerged as the most frequently cited factor, accounting for 28% of valid responses. Environmental factors followed, highlighted by 20% of respondents as a primary motivator. Retirement was the third most significant reason, with 12% identifying it as their key factor. Affordability and housing were deemed important by 8%, while lifestyle and change accounted for 7%. Job-related reasons (6%) and health and wellbeing (4.5%) were less commonly noted. Education and university ranked the lowest, with only 3% indicating it as their most important reason.

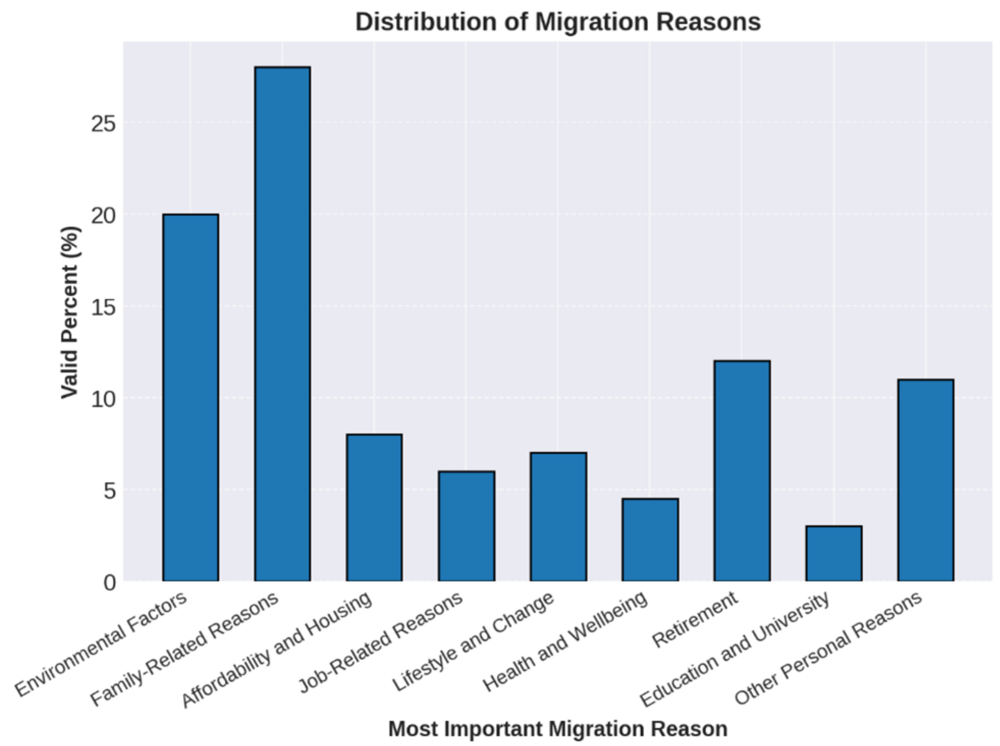


Figure 3.4.3. Most Important Reason for Moving to Cornwall

3.4.1. Further migration reasons: open-ended responses:

The survey also asked the respondents an open-ended question to list if there are influencing migration reasons that contributed to their decision to move to Cornwall. The qualitative responses reveal the diverse motivations behind people's decisions to move to Cornwall. While each individual's journey is unique, common themes emerge, including a desire for a better quality of life, proximity to nature, family connections, and housing considerations. The data suggests that migration to Cornwall is largely lifestyle-driven rather than economically motivated, with many respondents prioritizing well-being, environment, and community over career opportunities. Their responses can be categorised as follows:

Lifestyle & Quality of Life

Many respondents moved to Cornwall in search of a slower, more peaceful lifestyle away from the busyness of cities. The desire for a quieter, more relaxed pace of life was a key driver for relocation. Cornwall was perceived as a place that offers tranquillity, community, and a better work-life balance, making it an attractive destination for those seeking a lifestyle change. Examples of respondents' quotes:

“Better lifestyle, getting out of the city.”

“Peace and quiet compared to previous home.”

Natural Environment & Scenery

The natural beauty of Cornwall played a major role in people's decisions to move. Respondents frequently mentioned the coastline, beaches, countryside, and scenic landscapes as motivators. The opportunity to live closer to nature and enjoy outdoor activities, such as walking and coastal living, made Cornwall an appealing location. Examples of respondents' quotes:

“Access to the ocean.”

“The beauty of the countryside and sea.”

“Scenery / beaches.”

Family & Community

For many, moving to Cornwall was about strengthening family ties. Some were returning to their roots, having been born in Cornwall, while others relocated to be closer to family members. The sense of belonging and connection to the community was highly valued. Examples of respondents' quotes:

“Close to family and friends.”

“Moving near my daughter.”

“I was born in Cornwall, and all my ancestors were Cornish. And I wanted to move back.”

Affordability & Housing

Despite Cornwall's rising housing costs, some respondents found it more affordable compared to their previous locations. Some moved to downsize, while others relocated because they could buy a better-quality home for a similar or lower price. Affordability played a role, but it was often linked to lifestyle benefits rather than purely financial motives. Examples of respondents' quotes:

“Close to family and friends.”

“Moving near my daughter.”

“I was born in Cornwall, and all my ancestors were Cornish. And I wanted to move back.”

Health & Well-being

Cornwall's clean air, open spaces, and coastal environment were seen as beneficial for both mental and physical well-being. Some respondents explicitly mentioned improving their health as a reason for relocating, citing Cornwall's less polluted, more relaxing environment as a key factor. Examples of respondents' quotes:

“Fresh air, better environment to bring up children.”

“Health, walking, sea air, quiet, too much hustle and bustle in Oxford.”

Remote Work & Work-Life Balance

The rise of remote work (WFH) enabled some individuals to relocate to Cornwall while keeping their jobs elsewhere. Moving was no longer restricted by proximity to workplaces, allowing people to prioritize quality of life over job location. Examples of respondents' quotes:

“WFH enabled me to move.”

“Work/life balance.”

Moving for remote work and other purposes came with some challenges, especially transportation. While transport was not a primary reason for moving, some respondents expressed concerns about Cornwall's poor public transport infrastructure after relocating. The area's limited rail and bus services were noted as a challenge, particularly for those without a car. Examples of respondents' quotes:

“Terrible transport in Cornwall. Rail network too expensive & limited.”

Overall, the findings suggest that Cornwall remains an attractive destination for those seeking a slower pace of life, natural beauty, and stronger community ties. While affordability and remote work have enabled some to relocate, challenges such as transport limitations and accessibility issues were noted post-move. The data reinforces the idea that Cornwall's appeal is deeply rooted in its environmental and social qualities, rather than economic prospects, shaping its role as a place for lifestyle migration.

3.5. Household Income

This table compares income distributions between new and older households. New households have a relatively lower proportion of members earning under £16,000 (39%) compared to older households (47%), indicating a smaller representation of low-income earners among newer properties. In the middle-income range (£16,000–£22,000), the proportions are slightly lower for new households (24%) than for older ones (27.5%).

Notably, new households show a higher proportion of incomes in the £22,000–£40,000 range (47%) compared to older households (37%), suggesting a stronger presence of middle to upper-middle earners in newer properties. Similarly, higher income brackets (£41,000–£70,000) are more common among new households (26%) compared to older ones (17%), while the highest income category (over £70,000) also shows a slightly greater representation in new households (9%) than in older ones (6%). This distribution highlights that newer households tend to be associated with higher income levels across all ranges compared to older households.

Table 3.5.1. Distribution of Income

	Member Income <£16 K	Member Income £16 - £22	Member Income £22-40K	Member Income £41-70K	Member Income
New Households	39 %	24%	47%	26%	9%
Older Households	47%	27.5%	37%	17%	6%

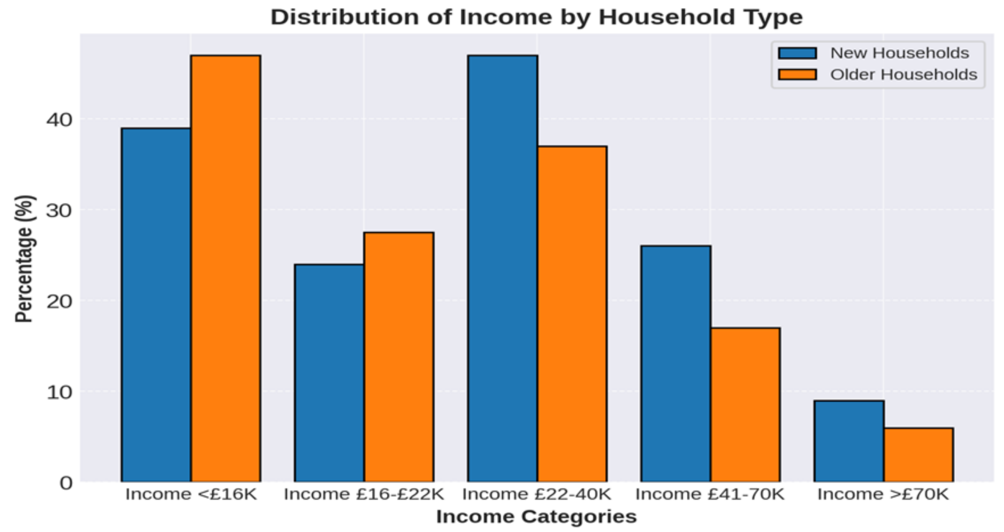


Figure 3.5.1. Distribution of Income

3.6. Economic Activity

This table compares employment statuses between new and older households. Members in full-time work are significantly more prevalent in new households (58%) compared to older households (39%), suggesting a stronger attachment to the labour market among newer households. Part-time work shows a smaller difference, with 29% of new households and 27% of older households having members engaged in such work. Unemployment is slightly higher in new households (4%) than in older ones (3%), but the proportion of those not working is nearly double in new households (4%) compared to older ones (2%). Multiple jobholders are more common in new households (21.5%) than older ones (16%), while self-employment is more prevalent in older households (40%) compared to new ones (34%). Retirement is notably higher in older households, with 54% retired compared to 35% in new households, reflecting demographic differences. Disability rates are slightly higher in older households (9%) compared to new ones (6%). How do we interpret this distribution? As with tenure and age, it points to a heterogeneity in the newer household population. It suggests two broad groups of people are resident in the newer housing. The first group are younger and more likely to be in the workforce and a second group of older people, further into their housing careers, owning outright and retired or perhaps leaving the labour market prematurely.

Table 3.6.1. Economic Activity – Households where there is at least one household member in each category

	Member in full time work	Member in Part Time work	Unem-ploy-ment	Not work-ing	Mul-tiple Jobs	Self Em-ployed	Re-tired	Disa-bled
New House-holds %	58%	29%	4%	4%	21.5%	34%	35%	6%
Older House-holds %	39%	27%	3%	2%	16%	40%	54%	9%

NB. The above percentages do not sum to a hundred, because they are derived from different questions. A household may have, for example, one retired and one member in full time work.

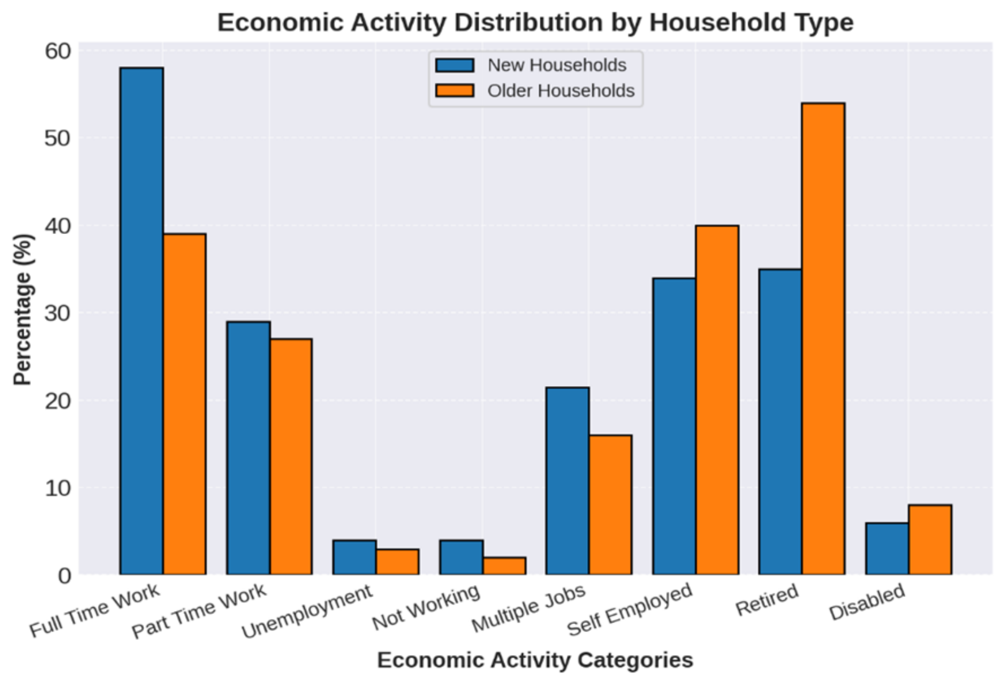
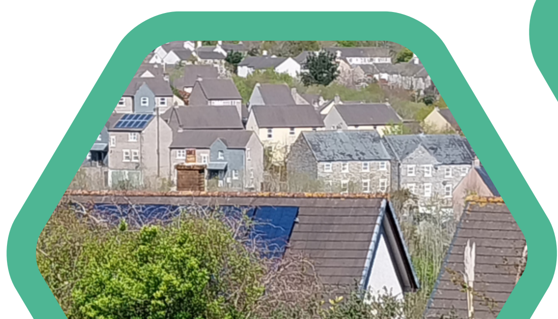


Figure 3.6.1. Economic Activity – Households where there is at least one household member in each category

In addition to comparing new and old households in terms of economic activity, we also compared those who were already resident, and moved within Cornwall, with those who moved to Cornwall from outside (Table 3.6.2). The data shows that households moving to Cornwall from outside are more likely to be economically inactive (43%) than those relocating within Cornwall (25.5%), while internal movers are more likely to be in work (74.5% vs. 57%). This suggests that many external movers are drawn by retirement or lifestyle factors, whereas internal movers are perhaps more likely to be driven by employment or housing needs. These trends highlight the growing impact of non-working in-migrants on Cornwall's housing market and labour force dynamics (see section 3.4 above).

Table 3.6.2. Migration patterns to Cornwall and employment

Movement to Cornwall	No One in Household Works (%)	At Least One Household Member Works (%)	Total Households
Moved from outside Cornwall	43%	57%	171
Moved within Cornwall	25.5%	74.5%	345
All	31%	69%	516



4. Education

We asked if there was anyone in the household in full time education. There was not a marked difference between those living in newer properties and those living in older ones, with the former reporting 15% of households had someone in full time education and the latter reporting 13.5%.

5. Location of the newer properties

Our sampling was based on those postcodes where there had been 20 or more properties built 2013 to 2023 (see Table 5.1 and Appendix One – Settlements Sampled). In other words, our sample postcodes are the areas of Cornwall with the largest number of new properties built in the last 10 years. We classified responses, by postcode, into Rural Areas, Coastal Towns and Inland Villages, Inland Towns and 'Industrial'/ 'Post Industrial'. No new developments, in our sample, were within completely rural areas, all were within or next to established settlements (villages or towns). The first category, then, consisted of inland villages, the second coastal villages, but also coastal towns, such as Penzance and St. Ives. Inland towns were places such as Helston or Liskeard and Industrial/ Post Industrial, were postcodes in and around Camborne and Redruth, but we also included Hayle in this classification. For a full list of sampled postcodes, please see the Appendices. The distribution of the new properties aligns fairly well with the distribution of older ones, except new properties were more likely to be in coastal towns/ villages and inland villages, thus in 'high amenity' areas[5]. The distribution of newer and older properties in the Industrial/ Post Industrial areas is the same. This may be a function of the building of social housing in these areas.

Table 5.1. Percentage location of Newer and Older Properties

Rural	Inland Villages	Coastal towns/ villages	Inland towns	Industrial/ Post Industrial	Other/ Unrelated	N=
New Households	12%	37%	38%	14%	0.3%	308%
Older Households	8%	31%	45%	14%	0.9%	540%

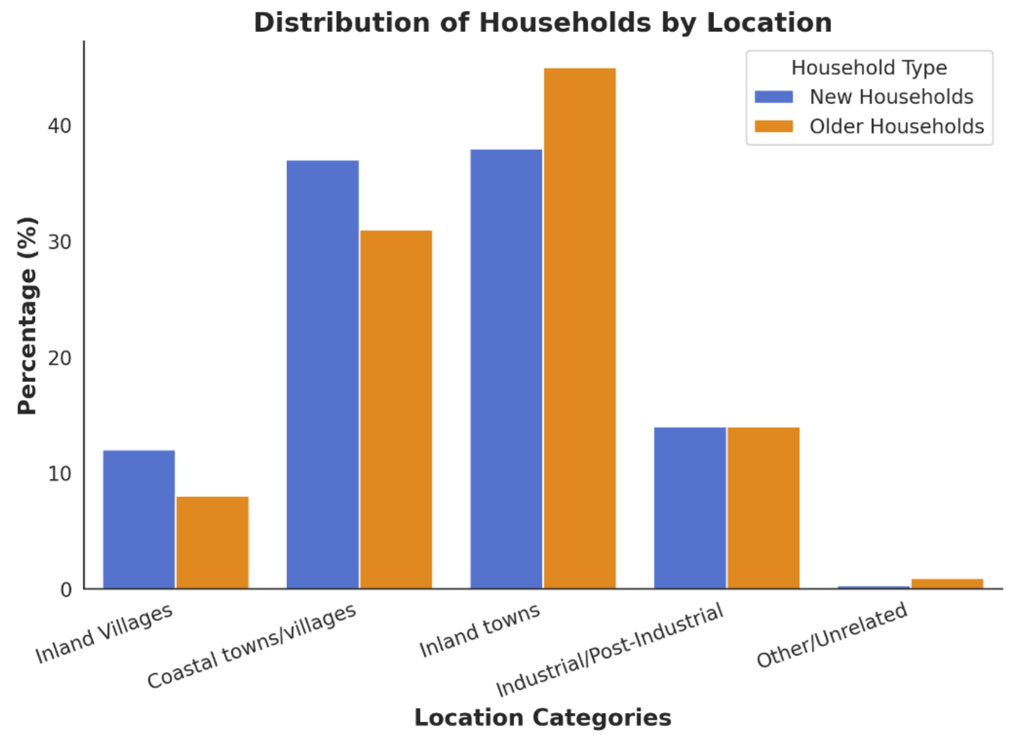


Figure 5.1. Distribution of Households by location

6. Travel to work and work patterns

In these analyses we compared travel to work and working from home patterns between those in the newer housing and those in the older housing. In these measures there were no statistical differences between the two group, so these have been combined in the following analyses. Thirty-six per cent of the total sample reported there was no-one in their household that was in work (this includes retired people). Of those who worked (Table 5.1), over 50% were travelling ten or more miles to work and 29% travelled twenty miles or more. We also asked about the main mode of transport, in the household, for journeys to work (Table 5.2). Public transport, bike or walking hardly featured as means of getting to work, with 89% reporting the main means of transport to work is car.

Table 6.1. Furthest anyone in the household must travel to work

Distance	%
Less than one mile/Working from home	13.5
One to four miles	18
Five to Nine miles	14
Ten to nineteen miles	26
Twenty miles or more	29
	N= 503

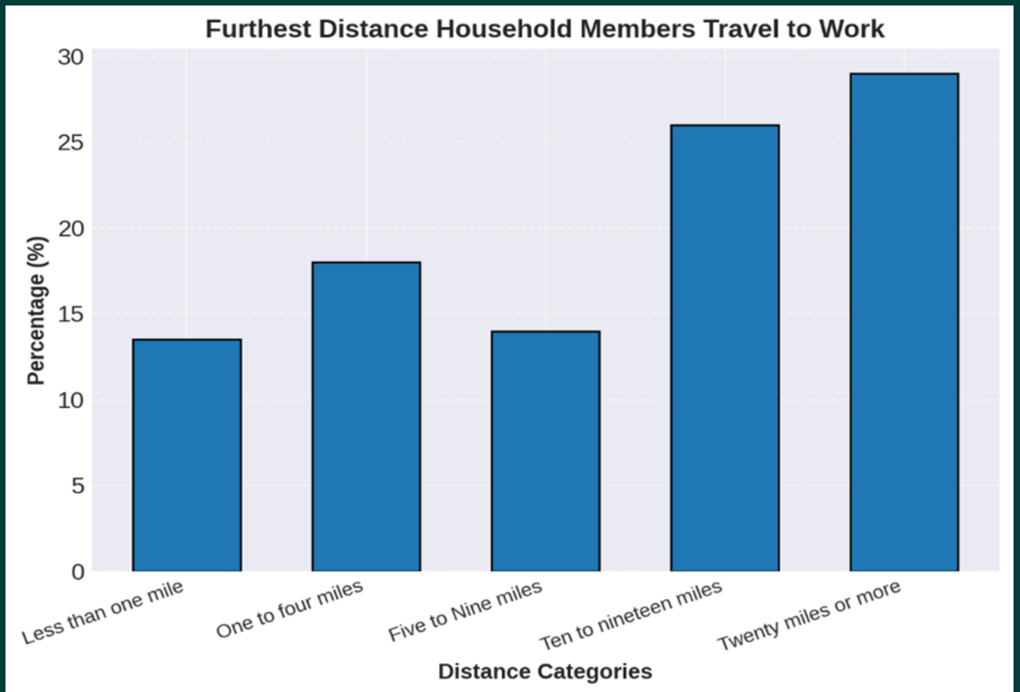


Figure 6.1 Furthest anyone in the household must travel to work

Table 6.2. Main means of transport used by the household to get to work

	%
Car	88.5
Foot	4
Bus	1
Train	2
Bike	2
Other	3
	N= 434

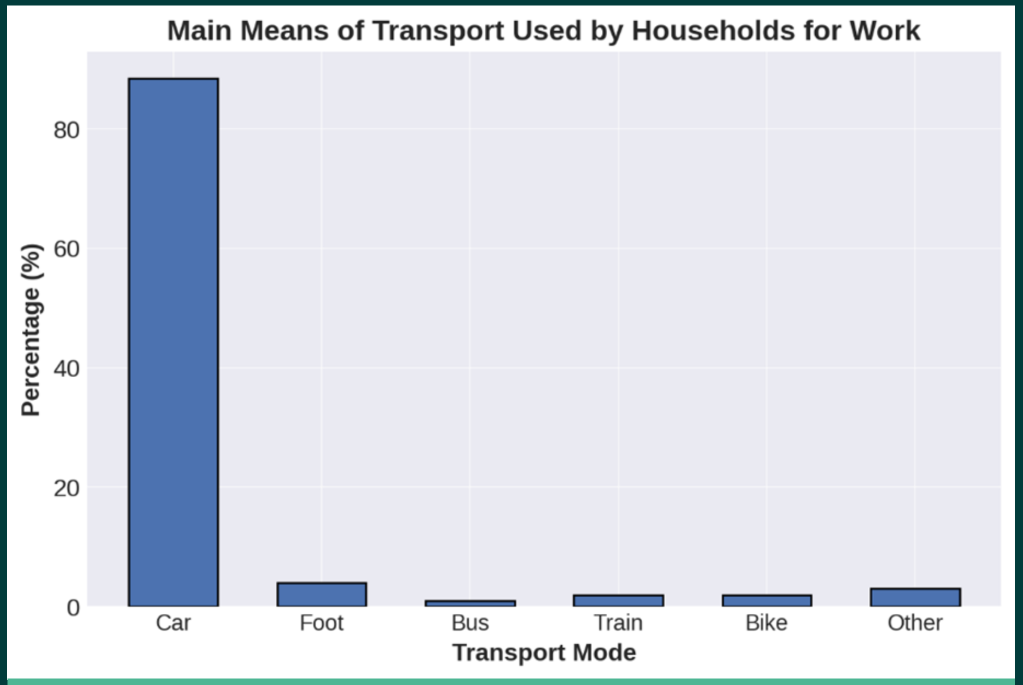


Figure 6.2 Main means of transport used by the household to get to work

We also asked about how many people in the household worked from home one or more days. There are no big differences in remote working patterns between households in newer and older properties. For full-time remote work ("working from home all the time"), newer properties report 22% compared to 23.5% for older properties, showing virtually no significant variation. Across other time frames, such as 4, 3, or 2 days per week, the percentages remain comparable between newer and older homes, with only slightly higher percentages in newer homes. However, a key distinction is evident for those not working from home at all: 60.5% of newer properties report no household members working remotely, compared to 54% for older properties. This is probably explained by the quite large proportion of those in newer households not economically active. In this, and other work patterns, we also compared those who moved to Cornwall, with the long-term population. Individuals moving to Cornwall from outside are more likely to work from home full-time (36%) compared to those moving within Cornwall (21%). Working from home for fewer days (2 days per week) shows little difference between the two groups. Notably, the majority of both groups do not work from home at all, with this being particularly prevalent among movers within Cornwall (59%) while percentage of movers from outside of Cornwall in this category is (49%). Overall, full-time remote work is more common among those moving from outside Cornwall, but the majority across all groups do not work from home regularly.

7. Housing attitudes of those moving to newer housing

Those who moved into new properties were asked about the housing issues that motivated them, by agreeing or disagreeing with a number of statements (see Table 7.1). Affordability was not a major issue for many movers, with 51% disagreeing that the new property was more expensive and 28% neutral. A majority (37%) saying their mortgage or rent was more affordable, and 45% neutral. Fifty-six per cent also said they had no problem affording to buy or rent their new property, with 20% neutral. Despite this, the affordability of living in the new property was not so clear cut, with 45.5% saying household bills were higher in their new property, with 24% neutral. Yet, 39% disagreed their previous property was more affordable, with 29% neutral. Though this last may encompass views on domestic affordability along with housing costs of mortgage/ rent.

Most movers seemed content with the location and environment of their new housing. Only 12% thought their property was too far from shops, schools or pubs, 64% thought their housing was more energy efficient. A majority, 43% said their property meets their needs, with 46% neutral. Fifty per cent said their new property was of better quality, with 29% neutral. Similarly, 57% said their property had better daylight and ventilation, with 30% neutral.

Table 7.1. Housing Attitudes of those moving to newer housing

	Disagree	Neutral	Agree
The property was more expensive than we could really afford.	51%	28%	21%
Our new property is more energy efficient	18%	18%	64%
Our new place is too far from services, such as shops, schools and pubs.	72%	17%	12%
Our mortgage or rent is affordable	18 %	45 %	37 %
Household bills are higher in our current property	30 %	24 %	45.5%
Our previous property was more affordable	39 %	29 %	32 %
We had no problem in affording to buy/ rent this property.	24 %	20 %	56%
We live closer to where we work compared to where we used to live.	31 %	49 %	20%
The new property meets my specific needs better e.g., Long-term illness / disability.	10 %	46 %	43 %
The previous property required refurbishment /retrofitting (upgrading)	40 %	27 %	33 %
The new property is of better quality	21 %	29 %	50%
The new property has better daylight and ventilation	13 %	30 %	57%

8. Environment, Transport and Facilities

In this section we report on respondents' attitudes to environmental matters and transport. As in the section above, we used Likert type attitude scales to measure levels of agreement on a number of positive and negative statements. With these we then computed an overall positive- negative 'score' for each suite of attitudes. Initially we divided responses into 'newer' and 'older' households, but there was no statistical difference between these. In other words, the views of those in newer and older households did not differ much on these matters.

8.1. Environmental Issues

The data reveals a strong consensus on the importance of green spaces, with 92.5% agreeing on the value of easy access to green areas and the countryside. Most respondents (88%) disagree with the notion that they don't need green spaces near their homes, indicating a clear preference for proximity to nature.

However, opinions are split on whether their local environment requires more green spaces, reflecting some ambivalence. Satisfaction about air quality is evident, as 62% disagree that there is noticeable air pollution in their neighbourhood, and 69% agree the air is generally clean.

Lastly, while many find their gardens sufficient (61%), there is still significant interest (54%) in more community gardens or allotments, highlighting a community desire for shared green resources. The analysis produced a mean score of 2.13, Indicating that respondents generally lean toward agreement on statements related to the importance of green spaces and the local environment. While this suggests a moderately positive perception, it also reflects some variation in opinions rather than overwhelming agreement. The responses indicate strong consensus on the value of access to green spaces and clean air, reinforcing a community preference for environmental sustainability.

However, perspectives on the need for additional green spaces are more divided, with some respondents feeling that existing provisions are sufficient while others express a desire for more. Similarly, while many respondents perceive their environment positively, concerns about air pollution and availability of community green spaces still exist, highlighting a nuanced view rather than universal agreement.

Table 8.1. Attitudes Toward Environmental Issues

	Disagree	Neutral	Agree
Easy access to green spaces is important to me	2 %	5 %	92.5%
I can easily access the countryside from where I live	4%	3.5%	92.5%
I don't feel the need for green spaces near my home	88 %	7.5%	4 %
There is noticeable air pollution in my neighbourhood	62 %	24 %	13 %
My garden is sufficient for my needs (food/leisure)	23 %	16 %	61%
The environment I live in needs more green spaces	33 %	36 %	31.5%
Green spaces should not be a priority in new developments	79%	6 %	15 %
The air is clean where we live	9 %	22 %	69 %
I would like to see more community gardens or allotments nearby	8 %	38 %	54 %
There are few food shops where we live	46 %	15%	39%

8.2. Transport

A majority of respondents (65%) report that their household rarely uses public transport (Table 8.2), indicating a reliance on other modes, likely private vehicles, supported by the 49% who agree that they can only reach desired destinations by car. Despite this, there is a positive perception of walkability, with 77.5% agreeing it is easy to walk in their local area, suggesting accessibility for short distances. Opinions on public transport in Cornwall are mixed.

While 45% feel it is too expensive, and only 18% agree it offers good value, views on service improvements are ambivalent, with 54.5% neutral regarding bus service improvements over the past five years. Additionally, the adequacy of rail services is split, with 44% considering them poor and 22% feeling they meet their needs.

A notable 52% feel more connected when they walk or cycle, indicating a social and emotional benefit tied to active transport modes, though this connection is less pronounced with public transport, with only 14 % agreeing. These results highlight a complex relationship with public transport in Cornwall, where perceived costs and limited awareness (41% do not feel informed) and may affect usage and satisfaction. The mean score of approximately 2.07 Indicates that respondents generally have a moderate to slightly positive perception of transportation and accessibility. This score is close to “Neutral” but leans towards agreement, suggesting that respondents are somewhat satisfied with their transportation experiences. The variable reflects a moderately positive stance on transportation and accessibility in Cornwall, though with notable concerns. Respondents appreciate walkability and feel connected when they use active transport, but cost and quality issues with public transport, particularly rail, appear to limit usage. The reliance on cars suggests gaps in public transit effectiveness or accessibility, highlighting areas for potential improvement in public transportation infrastructure to encourage more sustainable travel behaviours.

Table 8.2. Attitudes toward Transport

Statements	Disagree	Neutral	Agree
Our household rarely uses public transport	25 %	10 %	65 %
We can only get to where we want by car	30 %	22 %	49 %
It is too far, or too difficult to walk to local shops and amenities.	59 %	13 %	28 %
Bus services have improved in Cornwall in the last five years.	24 %	54.5%	22 %
I feel I know quite a lot about public transport in Cornwall	41%	34 %	25 %
Rail services in Cornwall are poor	16 %	40%	44 %
Public transport is too expensive	18.5%	37 %	45%
We try to use public transport whenever we can	51 %	24 %	24 %
Rail services in Cornwall suit our needs	40.5%	38 %	22 %
Public transport in Cornwall is good value	30.5 %	51.5%	18%
It is easy to walk about the local area	11%	11.5%	77.5%
I feel more connected when I use public transport	28 %	57.5%	14 %
I feel more connected when I walk/cycle	12 %	36 %	52 %

8.3. Cycling and Walking

Table 8.3 reflects strong support for walking and accessible footpaths but less engagement with cycling. A significant majority (75%) agree there are plenty of footpaths for exercise and leisure in their area, and an overwhelming 98% recognize walking as good exercise. Additionally, 66% believe more accessible footpaths should be available, emphasizing a demand for walkable infrastructure. In contrast, cycling appears less integral to respondents' routines, with 54% disagreeing that it is important in their household, and only 8.5% indicating that someone in their household cycles to work or school. However, there is moderate support for more cycling infrastructure, with 44% agreeing that more cycle lanes are needed, suggesting an interest in making cycling more feasible, even if it's not yet widely practiced. These findings indicate a community that values walking, and desires improved footpath accessibility but engages less with cycling as a regular activity, though there may be potential to increase cycling if infrastructure improves.

The mean score of 2.22 indicates that respondents generally lean towards agreement regarding statements about footpaths, walking, and cycling. This score suggests that while the perception is generally positive, it is not overwhelmingly strong, falling just above the "Neutral" level. The variable shows that respondents generally hold positive views about walking and the availability of footpaths for leisure and exercise. Walking is widely regarded as beneficial, and footpaths are appreciated, although there is interest in making them even more accessible. In contrast, cycling is not as central to respondents' routines, with many households not viewing it as important and few people cycling to work or school. Although some respondents support more cycle lanes, the lower emphasis on cycling infrastructure suggests that walking is the preferred active transport mode.

Table 8.3. Cycling and Walking

	Disagree	Neutral	Agree
There are plenty of footpaths (for exercise/ leisure) we can use where we live.	14%	11%	75%
Cycling is important in our household	54 %	23 %	23 %
There should be more cycle lanes where we live	26 %	30 %	44 %
Walking is good exercise	0.5%	1 %	98%
There should be more accessible foot-paths	7 %	28 %	66 %
At least one household member cycles to work/ school/ college	73 %	18 %	8.5%

9. Comparing 1980s data with the present

The 1986 research was only that of new households, there was no comparator of older households. Although the achieved sample size was greater in the earlier study, the sample was primarily a convenience sample (that is there were no controls in respective of representativeness). For our sampling strategy, see Section 2 above. Sometimes the questions were asked in different ways (we had no access to the questionnaire) and sometimes, questions not quite so relevant today were asked, for example car ownership. What follows is a report on just a few of the key variables where comparators were available.

Age: In 1986 31% of households had a person aged 55 plus, compared to the current sample 34% aged 51 to 65 (this was the same as the 'older' households. But in the current sample, 32% also reported having a member over 65 years of age. Twenty one percent of the 1986 survey had household members 17-29 years of age, compared to 2024, with 30% aged 18-35 years. In 1986, 32% had households with a person 30-54 years of age, and this percentage is the same in 2024, for the 36-50 age group. Although these are not exact comparators, because of different denominators, household age structure has remained roughly the same. Movement: In 1986 56% of moves were within Cornwall, compared to 44% from outside of Cornwall, whereas in 2024 66% of all moves were within Cornwall. In the 2024 study there was no statistical difference between newer and older households, in terms of overall moves, within Cornwall. In 1986, moves from Devon were specifically tabulated and these amounted to 5% across Cornwall, but 29% within the Caradon (Southeast Cornwall) district.

Reasons for Moving to Cornwall: As reported above there were no statistical differences between newer and older households, who moved to Cornwall, in respect of motivation. Table 9.1 below compares the ranking of in-migrant households, in 2024. There are both similarities and differences. At both times environmental and family reasons ranked high and housing/ retirement also approximately the same. What was probably an anomalous finding, in 1986, was that job related reasons came first, but were 7th in 2024. The 1986 result is particularly odd, because only 19% were moving to jobs in Cornwall. A previous Cornwall County Council survey in 1975[6] ranked job-related reasons last.

A 1983 survey had had the category' enjoyed previous holidays in Cornwall', so it is possible that the perception of Cornwall as economically buoyant was gained from such holidays and was a motivation. This is borne out by a 1993 qualitative study[7], of households which found that there was a belief amongst migrants that there were plenty of jobs in Cornwall.

Table 9.1. Comparative Rankings for Moving to Cornwall 1986 – 2024

Most Important Migration Reason	Rank 2024	Rank 1986
Family-Related Reasons	1	4
Environmental Factors	2	2
Retirement	3	n/a
Other Personal Reasons	4	3
Housing	5	4
Lifestyle and Change*	6	7
Job-Related Reasons	7	1
Health and Wellbeing	8	n/a
Education and University	9	n/a

*In 1986 'Escape from the city'

10. Demographic Change and Housing Units Built

The 1986 research was partially motivated by comparative work on the demographic characteristics of neighbouring authorities, compared to Cornwall. We undertook some comparative analyses, though somewhat different to those of 1986. To compare units built in Cornwall, with elsewhere, we compared unitary authorities of similar population size, to Cornwall, and with some neighbouring unitary authorities.

Firstly, we compared populations based on 2023 mid-year estimates to yield authorities with similar sized populations (columns 1 & 2) and neighbouring unitary authorities (which had smaller populations than Cornwall). In column 3 we compared population change, in these authorities and in column 4, the number of units built. The final column shows units built in the neighbouring authorities (albeit with smaller populations) adjusting numbers for what would have been built, if they had been building at the same rate as Cornwall. These data show total units built, not whether they are in the private, 'affordable' or social sector. Some caution is needed in interpreting these data, but some tentative conclusions might be drawn. Firstly, that Cornwall is building more units than other comparable unitary authorities, other than Buckinghamshire.

The table suggests that there is a link between population growth and numbers of housing units built in some authorities, such as Cornwall and Buckinghamshire. That is, these authorities, are building to satisfy demand, whereas in authorities such Sheffield, Durham or Dorset, units built seem to be in excess of demand through population change. Only Torbay has experienced a population increase, that is in excess to the number of units built.

Table 10.1. Housing Units Built in Comparable Population Authorities

	Population 2023[1]	Percentage Population Change 2011-21[3]	Units Built 2020-23[2]	Adjusted for Population (Cornwall as reference category)
Buckinghamshire	566,694	9.5	7242	-
Cornwall	578,324	7.1	6623	-
Liverpool	503,740	6.6	5005	-
Sheffield	573,252	0.7	4667	-
County Durham	532,182	1.7	4683	-
Somerset	581,145	7.9	1942	-
Dorset	384,809	4.0	4308	4232
Plymouth	268,736	3.2	1174	3077
Torbay	139,485	6.4	506	1597

Sources
[1] NOMIS 2023 mid-year estimates
[2] House of Commons Library
[3] Office for National Statistics

11. Cluster Analysis of the Cornish Housing Market

11.1. Introduction

This report presents key findings from the K-means Cluster Analysis (CA) and Hierarchical Cluster Analysis (HCA)[8], which were conducted to segment respondents based on housing affordability, property ownership, transport choices, and financial stability. The purpose of this analysis was to identify distinct groups of residents who share similar housing conditions and affordability challenges. After careful refinement, a three-cluster solution was selected as the most meaningful segmentation. These clusters reveal how affordability, transport access, and housing types shape the experiences of Cornwall residents. While a small portion of cases remained unclassified, the overall findings provide valuable insights into housing disparities and financial conditions across different resident groups.

11.2. Understanding the Three Clusters

Cluster 1: Financially Stable Homeowners

This group is primarily composed of financially stable homeowners who face fewer affordability concerns. They are more likely to own detached homes or bungalows, reflecting long-term housing security. Most rely on private transport, indicating economic stability that enables car ownership and mobility. Their housing decisions are driven by lifestyle choices rather than financial constraints, highlighting their secure financial position.

What This Means:

Cluster 1 represents financially secure individuals with stable housing conditions. Their housing choices are less influenced by affordability pressures and more by long-term homeownership and personal preferences.

Cluster 2: Affordability-Constrained Households

This group faces greater financial stress related to housing affordability, making them more likely to rent or live in smaller, lower-cost properties. Their transport choices are more varied, with many relying on public transport or shared mobility options due to financial constraints. Housing decisions in this group are driven by necessity rather than personal preference, reflecting their economic challenges.

What This Means:

Cluster 2 highlights the most affordability-stressed segment of the population. Their housing conditions are more unstable, and they face challenges in securing long-term housing. This group is most affected by rising housing costs and financial constraints.

Cluster 3: Mixed-Status Residents with Moderate Affordability Concerns

This group includes a mix of homeowners and renters who experience moderate affordability concerns. They live in varied housing types, from semi-detached homes to flats, indicating some financial flexibility but not complete stability. Their transport choices differ, though a higher proportion still rely on private vehicles compared to Cluster 2. While affordability influences their housing decisions, they are not as financially vulnerable as Cluster 2.

What This Means:

Cluster 3 represents a transitional group or residents who experience some affordability challenges but maintain relative stability in their housing choices. Their ability to navigate financial constraints may depend on income stability, housing assistance, or shared ownership models.

11.3. Statistical Significance in Simple Terms

The statistical analysis (ANOVA) confirms that certain factors strongly differentiate the clusters, while others have little to no impact. Housing affordability is the most significant factor ($p < 0.001$). This means affordability concerns vary greatly between clusters, with some groups facing major financial stress while others do not. Transport choices also play a big role ($p < 0.001$). For example, financially stable groups are more likely to own a car, while those struggling with affordability rely more on public transport. Property type matters in clustering ($p < 0.001$). People living in detached houses and bungalows tend to have better financial situation, while those in flats and rented homes experience more affordability challenges.

Property ownership is not a strong factor ($p = 0.697$, not significant), whether someone owns or rents their home does not strongly separate the groups. Some homeowners still face affordability pressures, and some renters have stable finances. Ethnicity had weak significance ($p = 0.001$). Although ethnicity itself was not a primary driver in clustering, Cornish-identifying individuals are underrepresented in newer housing.

This is likely linked to broader economic disparities rather than ethnicity being a direct causal factor. This does not negate from the earlier reported findings in respect of those reporting Cornish ethnicity, rather it suggests that there is a correlation between 'being Cornish' and poorer economic conditions[9].

What This Means:

Housing clusters in Cornwall differ based on affordability, housing type, and transport choices. Statistical analysis confirms these factors strongly shape housing conditions. Notably, homeownership alone does not guarantee financial security, highlighting the need for affordability-focused policies.

a. Summary: Cluster Analysis

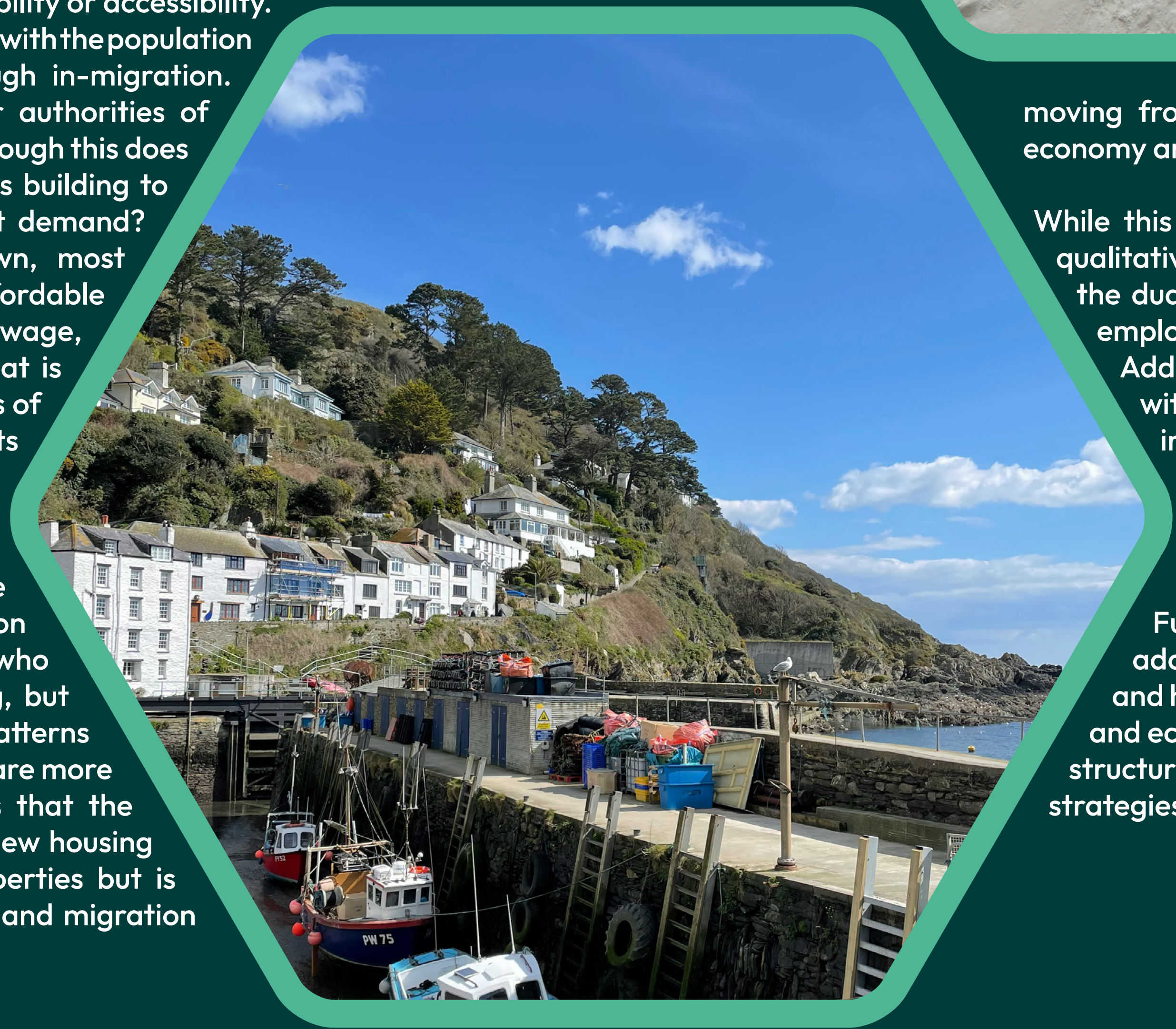
This analysis provides a clear segmentation of Cornwall's housing landscape, highlighting how affordability pressures, transport choices, and property types shape financial stability among residents. The findings reveal that housing affordability remains a critical issue, particularly for renters and lower-income households, while transport access is closely linked to economic conditions, with car ownership serving as an indicator of financial independence. Additionally, homeownership does not necessarily eliminate affordability concerns, especially for those in transitional financial situations. These insights underscore the urgent need for targeted policies addressing affordability and housing security, particularly for residents in Cluster 2, who face the highest financial stress. By recognizing these distinct housing groups, stakeholders can implement better-targeted housing policies, support systems, and affordability initiatives to improve long-term stability and accessibility.

12. Concluding remarks

The 1986 survey focused exclusively on newer housing, without a comparative analysis of older housing. In contrast, the present study provides a broader perspective by comparing newer and older households, examining a wider range of variables, and offering deeper insights into demographic, economic, and housing-related trends.

Despite Cornwall having built as many or more housing units as comparable authorities, the housing shortage persists, which of course is true elsewhere. While newer housing has added to the housing stock, it has not significantly improved affordability or accessibility. Indeed, the number of units built is in line with the population growth, most of which comes through in-migration. However, it is similar to some other authorities of similar population size and growth. Though this does beg a question of whether Cornwall is building to demand, or by building creating that demand? As our previous research has shown, most housing for sale in Cornwall is not affordable for those earning the Cornish median wage, which suggested that the demand that is fulfilled is from those earning in excess of the median wage[10]. The number of units built does not satisfy local housing demand for affordable housing[11].

The findings reveal some notable differences, such as income distribution and underrepresentation of those who identify as Cornish, in newer housing, but overall, demographic and attitudinal patterns between newer and older households are more similar than expected. This suggests that the housing crisis is not solely caused by new housing supply or who resides in newer properties but is shaped by broader market dynamics and migration trends.



A more pronounced divide emerges between long-term Cornwall residents and more recent in-migrants, particularly in terms of economic activity and housing tenure. Additionally, those identifying as Cornish are less likely to live in newer housing, which raises important questions about access to homeownership and affordability for local populations. The data also reinforces that migration to Cornwall continues to be primarily lifestyle-driven, with movers prioritizing environmental quality, rejoining family, and retirement over employment opportunities. The significant proportion of economically inactive in-migrants, especially among those moving from outside Cornwall, has implications for both the local economy and housing demand.

While this study provides a wealth of quantitative insights, further qualitative research would help clarify emerging trends, particularly the dual nature of newer households, consisting of both younger, employed mortgage holders and older, outright homeowners. Additionally, the strong reliance on cars and dissatisfaction with public transport highlights potential areas for policy intervention to improve infrastructure and sustainable transport options. Overall, the study underscores the complex and interdependent relationships between housing, migration, and the local economy.

Future research and policy development should not only address housing supply but also examine who is accessing housing and how migration patterns shape affordability, homeownership, and economic participation in Cornwall. Addressing these broader structural factors will be key to developing more effective housing strategies and mitigating long-term housing inequalities in the region.

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[9] See Husk (2017) above.
[10] See: Williams, M and Lawlor, P (2022) Local Housing Affordability in Cornwall. Penryn: Institute of Cornish Studies, Exeter University
[11] .Ibid

New Household Survey 2024-25
Arhwithrans Mayni Nowydh 2024-25

Social and Economic Research Unit
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Unsys Hwithrans Socyal hag Erbysek
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