

NSBRC ASPIRATIONS SURVEY 2023

In July 2023 we commissioned our **third annual survey**. The National Self Build & Renovation Centre and the National Custom & Self Build Association (NaCSBA) surveyed previous visitors to the centre and visitors to NaCSBA's self-build web portal. The aim was to understand what **motivates** people undertaking substantial homebuilding projects and the **barriers** they face.

This survey reflects the ambitions of those already interested in an owner-commissioned home, rather than the wider public coming to the subject for the first time. A total of **759 responses** were received, giving substantial weight to the results.



We believe people deserve better homes. We can help you create a better home by delivering on our three key promises:

- We'll **inspire** you by showcasing the very best building methods, trends and technologies.
- We'll **inform** you with our range of shows, workshops, courses and educational tours.
- We'll always offer **impartial** advice you can trust.

The NSBRC is open six days a week (Tuesday to Sunday) all year round.



Reach

OUR REACH COVERS THE WHOLE OF THE UK

Just ¼ of our audience live in the same Postcode area (SN), or that immediately surrounding (BA, BS, GL, OX, RG, SP) the NSBRC, showing a genuine national reach.

SN (NSBRC Postcode) = 42. Surrounding postcode areas to SN: (RG, OX, GL, BS, BA, SP) = 145. Other postcodes: 572. This is the same as previous year's results.



Age

55-64

- **37.5%** were in this age bracket.
- Almost three-quarters (**73.4%**) are 55 years plus.
- Just one tenth (**9.9%**) are under 45 years of age.

Compared with previous surveys the respondents are a little older on average and the proportion of those who describe themselves as 'Retired' is up to 38%. It is striking that over 20% describe themselves as 'self-employed' - in many cases owners of their own businesses.

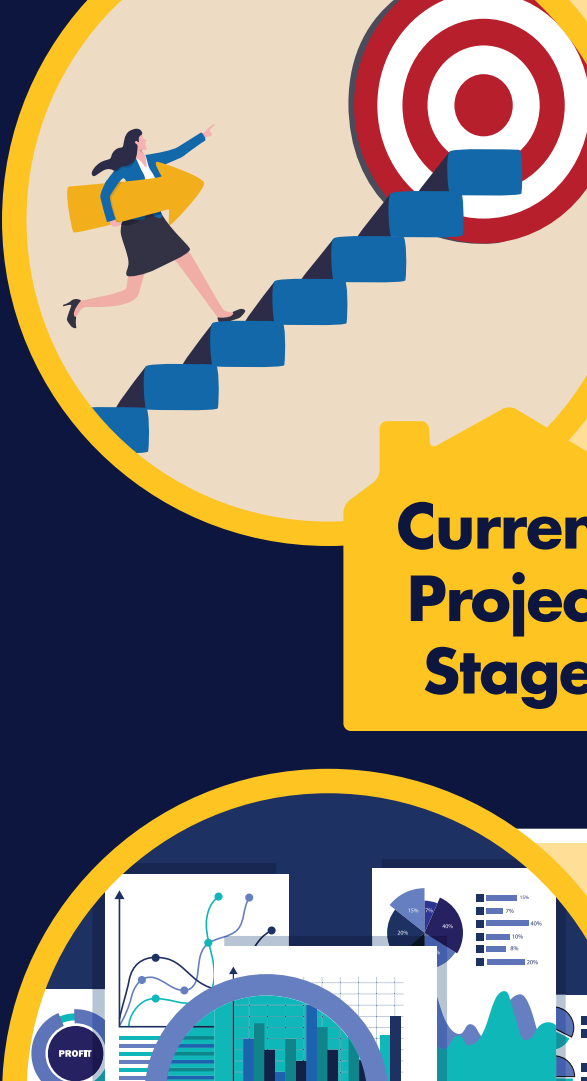


Income

£67,391

The average joint household income. **33.5%** earn under **£50Kpa** and **22%** earn over **£100Kpa**. *This data needs to be read in the context of the age profile (with many retirees not receiving significant income from salaried employment)*

The percentage of people with a joint income of under £50Kpa has reduced from 39% in 2021.



Employment Status

- **39.3%** of our audience our **working Full Time** - either employed or self-employed.
- A further **17.3%** our **working Part Time** - either employed or self-employed.
- Almost four in ten **38.8%** are **retired**.



Type of Project

69% ARE BUILDING A BRAND NEW HOME*

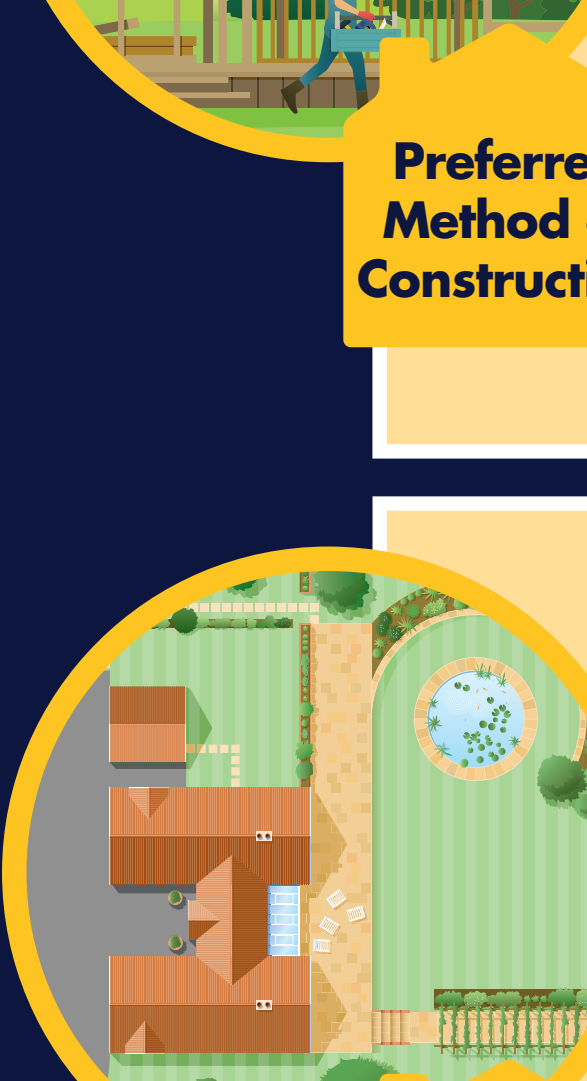
Almost half (**47.9%**) of those surveyed plan to **build a new home** on an empty plot with a further **21%** planning to **demolish** and replace an existing property - a growing reflection of the lack of single self build plot availability. The remaining **31%** are **renovating/improving** an existing property.

Of those building a new home, **75.9%** are **self-building**.

The most popular build route was 'self-managed' (where you find a plot of land, design your home, and are very hands on during the build) with **40.1%** opting for this route, with a further **26.1%** choosing to use a main contractor (where you find a plot of land, design your home, & appoint a contractor to build it and are mainly hands off during the build).

19.9% custom building (where you buy a prepared plot of land with existing services). *This shows an increase, up from 13.5% in 2022.*

**This has fallen from 79% in 2022.*



Current Project Stage

There was a spread of project stage, reflecting the survey capturing people at a wide range of steps along their self-build journeys.

- **29.3%** were still at early stages and researching
- **38%** described their project as having planning secured or beyond
- **6.8%** having completed their build



Budget

£350-500,000

Total budgets (for land and build) have increased slightly since the 2022 survey with fewer working to budgets below £350k.

The "sweet spot" is **£350-500,000**.



Where Has Funding Come From?

FUNDING *A new question for 2023*

Exactly two-thirds of people are **using savings** to fund their project, although the picture shows that the most common source of funding comes from a combination of **personal savings** and **equity** in existing properties.

23.7% of people were relying on **borrowings**, and there was an even split between modest borrowing allowing the completion of a project (**18.6%**), bridging finance (allowing the self-builder to remain in their existing property during the build) (**17.2%**) and more substantial borrowings (a self-build mortgage with staged/advance drawdowns) (**16.6%**).



Hands On

51.8% OF SELF/CUSTOM BUILDERS EXPECT TO BE 'VERY HANDS ON'

**This is up from 47% in 2022 and shows an obvious area where individuals can make cost savings during their projects.*

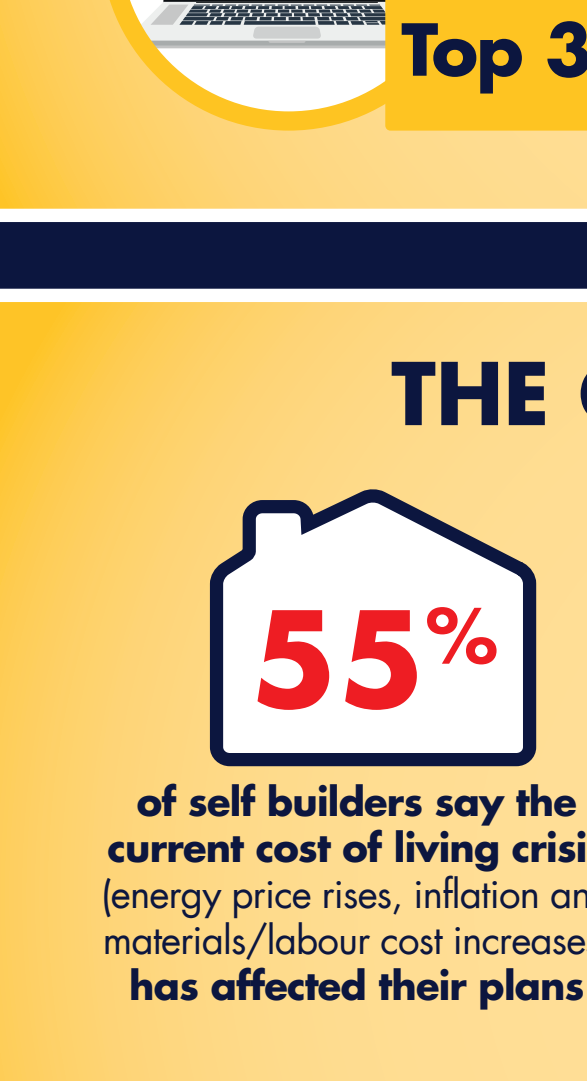


Preferred Method of Construction

TIMBER REMAINS THE MOST POPULAR SUPER-STRUCTURE CHOICE.

We asked which building system people were choosing to build with, and while **17%** were still undecided, **Timber Frame** came out as the most popular system again, with **24.3%**, followed closely by **prefabricated timber panels** (Structural Insulated Panels) at **23%**. Also popular are **traditional masonry** (14%) and **Insulated Concrete Formwork** (ICF) at **11.2%**. There was also a strong interest in sustainable materials and attaining 'Passivhaus' standards.

- Timber Frame - **24.3%**
- Prefabricated / Structural Timber Panels (SIP's) - **23.1%**
- Traditional Masonry - **14%**
- Insulated Concrete Formwork (ICF) - **11.2%**
- Others (including Oak, Straw Bale and COB) - **10.2%**
- Undecided - **17.2%**



Plots

Self-builders have a clear preference for the type of plot they are seeking. **The ideal for a majority is a single plot within or on the edge of an existing smaller settlement.** Encouragingly for the custom build sector **over 30%** would be happy with a **plot within a larger multi-plot site**.

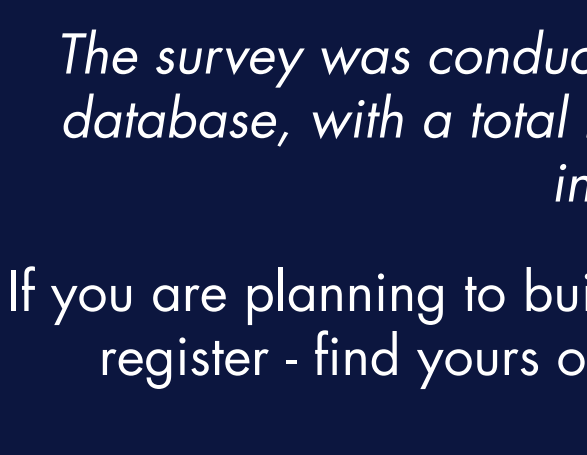
- **One quarter** already own or have inherited the property on which they are building.
- **One third** are still searching for a plot.
- **One third** of people are still searching for a plot in **less than six months** and others taking **over 3 years**. There is a similar spread for those still searching.
- Of those who have found their plot **40%** found it through an estate agent or auction house. **Only 6%** found it via a plot finding website - though note that these sites are used more to identify availability, prices and selling agents.



Quality

PERCEIVED LACK OF QUALITY IN UK HOUSING

91.1% of people we surveyed would **not want to buy a new build home** but would rather **not move at all (47%)** or would **buy an existing** (second hand) property (**44%**).



Sustainability

Sustainability is very important to self-builders, with **91% of people saying they'd budgeted for higher levels of insulation.**

TOP FIVE BUDGETED SUSTAINABLE ITEMS:

- Higher levels of insulation - **91%**
- Micro renewables to generate energy (such as solar PV) - **76.6%** (up from third in 2022)
- A sustainable heating and/or cooling system (such as an air source or ground source heat pump) - **72.7%**
- Mechanical ventilation and/or heat recovery system - **72.7%**
- Triple glazing - **64.5%**

Top 3

TOP 3 MOTIVATIONS

- #1 To achieve **Higher quality** than a standard new build
- #2 A more **sustainable and environmentally friendly** home
- #3 A home **built to their exact specifications**

Top 3

TOP 3 OBSTACLES

- #1 **Gaining Planning Permission**
- #2 **Finding a suitable Plot**
- #3 **Time**

Planning permission has overtake Finding a Plot as the biggest obstacle from the 2022 results.

Projects with Existing Properties

54.5% are substantially renovating or extending and improving, an existing property.

3.6% are converting a property into a home for the first time

41.1% have a budget of **£100K+**
With 78.4% funding these projects from Savings

THE 'RIGHT TO BUILD' AND 'HELP TO BUILD'

81% are aware of the 'Right to Build' legislation
(up 2% from 2022)

52.7% have joined a Right to Build register
(up 2% from 2022)

39.3% have faced obstacles when joining their local authorities register

Top 3

THE TOP 3 OBSTACLES (for people in England) ARE:

- #1 Perception that there is **no point joining** as you get no help or information on plots
- #2 Don't meet the **local connection test**
- #3 Could **not find information** about their local council's register

THE COST OF LIVING CRISIS

55% of self builders say the current cost of living crisis (energy price rises, inflation and materials/labour cost increases) has affected their plans

JUST 1.5% have decided not to pursue a project while **19.7%** have delayed their plans but still plan to build

18.5% of those affected have planned for more energy saving measures

23.9% plan to do more of the work themselves to offset costs and **35.9%** of those affected have planned for more energy saving measures

A SIMILAR PICTURE IS PAINTED BY THOSE DOING SMALLER SCALE PROJECTS

ONLY 2.5% have decided not to pursue a project while **22.9%** have delayed their plans but still plan to build

36.8% plan to do more of the work themselves to offset costs and **35.9%** of those affected have planned for more energy saving measures

It was lovely to see that **53% of people had visited the NSBRC twice or more** and it is always a pleasure to meet people who first found us while plot hunting, who have gone on to create their **perfect homes**, often using our **fantastic exhibitors**.

77% FEEL HAPPIER OR VERY MUCH HAPPIER (51.2%) DEALING WITH AN EMPLOYEE-OWNED BUSINESS LIKE THE NSBRC

OUR SURVEY RATING FOR CUSTOMER EXPERIENCE

The survey was conducted by email in July 2023, sent to the NSBRC & NaCSBA database, with a total response of 759 people. This compares to 644 responses in 2022 and 681 responses in 2021.

If you are planning to build in the future, make sure you sign your local Right to Build register - find yours on NaCSBA's website: www.selfbuildportal.org.uk