

The Rightmove Consumer Confidence Survey

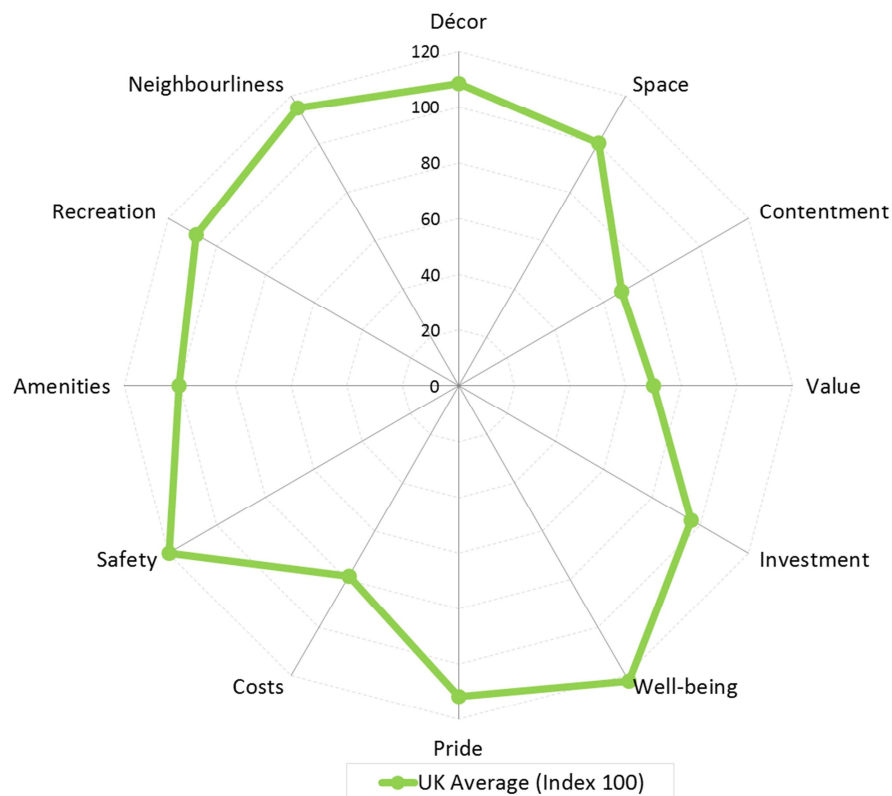
The UK's leading survey of consumers from the UK's leading property website

The Rightmove Happy at Home Index

Welcome to Carlisle: The Happiest Place to live in the UK

- Despite numerous reports highlighting the contrasting fortunes for the North and South on conventional property measures like property prices and transaction volumes, those living in The North (101) are marginally happier with where they live than those in The South (99)
 - Seven of the 10 happiest cities in the UK are in the North – of the Top 10, only Norwich (104), Dorchester (104) and Exeter (103) are in the South
 - Of the 12 measures that comprise the index, the North outscores the South on all but two (recreation and amenities)
- Rightmove's 'Happy at Home' Index finds, overall, residents of the 'Border City' of Carlisle to be happiest with where they live with an index of 107 (national average = 100). At the opposite end of the scale, residents of East London are the least happy (90)
- The measures which saw 'well-being' (i.e. feeling relaxed at home; 123), 'safety' (i.e. feeling safe in the local community; 120) and 'neighbourliness' (i.e. believing people in your area to be friendly and polite; 115) rank as the three highest

Happy at Home Index: a breakdown of the 12 measures that comprise the index



In total, 25,349 responded to the survey which was conducted between 3rd of October and 17th of October 2011

The Rightmove Happy at Home Index

The residents of Carlisle are the happiest at home in the UK and those living in the North are happier than those in the South, according to the Rightmove's new 'Happy at Home Index'.

The Index uses 12 measures to assess how the people of Britain feel about where they live, from the size and decorative condition of their property to the feeling of neighbourliness and levels of safety within their local community. The result is a unique, and nationwide, insight about the emotive relationship we have with our homes that goes beyond the traditional property market metrics.

Miles Shipside, director at Rightmove, comments: "The Happy at Home Index attempts to measure how we feel about where we live by taking into account the relationship we have with our property, our home and our community. Traditional property market measures, such as price trends and transaction volumes, are both valuable and fascinating, but both fall short of treating property as a home. This extensive study of over 25,000 people across the UK gives an insight into how happy at home we are as a nation and which factors provide us with the most contentment."

Carlisle: The UK's 'Happiest at Home'

With an index score of 107, the residents of Carlisle in Cumbria are the happiest at home in the UK. Interestingly, seven of the 10 happiest towns and cities in the UK are in the North: Carlisle (107), York (106), Huddersfield (105), Harrogate (104), Chester (104), Llandudno (104) and Derby (104). Only Norwich (104), Dorchester (104) and Exeter (103) feature from the South. By contrast, nine of the 10 at the bottom of the index league table are in the South, with those living in East London (all E-postcodes) the least happy with an index of 90. Oldham (94) is the only representative of the north in the lowest scoring 10 towns and cities overall.

The dominance of northern towns and cities in the higher reaches of the index means that the northern region (East & West Midlands, North West, Yorkshire & Humber, North East, Wales) has a higher Happy at Home Index than the south (South West, South East, London, East Anglia). Whilst the difference between the two regions is relatively small, it is an interesting reversal in fortunes for both, as traditional property market measures – particularly price trends and transaction volumes – typically favour the South.

Miles Shipside, director at Rightmove, explains: "Our research provides an interesting challenge to the typical view of the north-south divide. Neither Carlisle nor the north regularly features at the top of too many property market league-tables, but this doesn't appear to be playing on the minds of those who live there too much!"

So, what's so good about Carlisle?

Carlisle is the second most northerly city in England and often referred to as 'The Border City' because of its proximity to the England-Scotland border. The City of Carlisle is a local government district of Cumbria which is named after its largest city. Though the city only has a population of around 100,000, it is, by area, the second largest city in England (though the majority is not urbanised). Situated on the M6, it is within easy reach of the Lake District, and Northumberland and Kielder national parks.

Average asking prices in Carlisle started the year at £136,586, some 7.3% lower than they were in January 2011. Since peaking in September 2007, average asking prices have fallen 23%.

Top and bottom 10 towns/cities

Top 10		Bottom 10	
Carlisle	107	London - East	90
York	106	Ilford	91
Huddersfield	105	London - South East	91
Harrogate	104	Luton	94
Chester	104	Romford	94
Llandudno	104	Oldham	94
Norwich	104	Enfield	94
Derby	104	London - North	95
Dorchester	104	London - West	96
Exeter	103	Harrow	96

The index explained

Rightmove identified 12 measures which contribute to the overall level of happiness we feel with where we live. The measures cover a broad range of factors that affect our view of where we live and are divided into three categories: your property, your home and your community. Responses for each of the 12 measures are averaged to provide both a category score and an overall score – the ‘Happy at Home Index’. The table below summarises the 12 factors that make up the index with the highest and lowest ranking town or city.

Index	Lowest ranking town/city	Factor	Top ranking town/city	Index
Your Property				
90	East London	DÉCOR	Carlisle	112
78	North London	SPACE	Durham	117
82	Watford	CONTENTMENT	Harrogate	120
80	Oldham	VALUE	North West London	125
Your Home				
89	Ilford	INVESTMENT	Carlisle	108
94	Bradford	WELL-BEING	Dudley	106
90	East London	PRIDE	Dudley	110
90	Luton	COSTS	Swindon	110
Your Community				
81	East London	SAFETY	Dorchester	113
84	Oldham	AMENITIES	South West London	111
80	Oldham	RECREATION	Dorchester	112
81	Ilford	NEIGHBOURLINESS	Dorchester	109
90	East London	‘Happy at Home’ Index	Carlisle	107

The national average for each category and the total overall score were indexed to 100. Carlisle is 7 index points above the national average Happy at Home score. East London is 10 index points below the national average Happy at Home score.

Full scores for each town and city can be found on the attached spreadsheet

At a glance

- Of the three categories measured – property, home, community – the highest levels of contentment were recorded for community (111). Home has an index of 102 and property an index of 87.
- At a national level, the highest individual factor score was for well-being (123). This measure assesses the extent to which respondents feel relaxed when at home. Dudley indexed highest on well-being and Bradford lowest.

Community

- Dorchester in Dorset emerges as the town with the happiest residents for community, scoring highest for three of the four community factors: safety (113), recreation (112) and neighbourliness (109).
- Oldham in Lancashire is shown to have the lowest levels of contentment with community, scoring lowest for both recreation (80) and amenities (84). Oldham also scores below the national average for safety (96) and neighbourliness (93).
- Those under the age of 25 are the least satisfied with local amenities (97) and the least happy to spend their recreation time in their local community (92). Interestingly, they are also the least likely to say that they feel safe in their local community (96).

Home

- Well-being, which measures the extent to which people feel relaxed when at home, has the highest of index of all 12 at a national level. At a local level, Dudley ranks highest (106) and Bradford lowest (94).
- As a factor, costs, measured by the stress exerted by the financial commitment of running a home, score the lowest within the category. Home-owners in Swindon are the least likely to feel anxious about costs (90) and residents of Luton the most likely (110). Nationally, more than two in five (42%) indicated that the costs of running their regularly cause them to feel anxious.
- Residents of Carlisle are the most likely to invest in their home by choosing to spend money on non-essential improvements (108). At the other end of the scale, Ilford (89) is the least likely to invest in their home.
- Our research finds that those in Dudley are the most house proud (110).

Property

- Of the 12 measures that comprise the Happy at Home index, only two have a category index below 100: Contentment, the extent to which one feels that they would be happier living in a different property, and value, as assessed by regular feelings of concern about the value of the property. Nearly half of all respondents (48%) indicated that they worry about the value of their property.
- Residents of North West London – which includes the likes of Camden, Hampstead and St John's Wood – are the least likely to worry about the value of their property (125). At the other end of the scale, two areas of the North West – Oldham (80) and Crewe (81) – were the most likely to worry.
- In terms of satisfaction with available living space, Durham emerges as top of the rankings with an index of (117). Perhaps unsurprisingly, areas of Greater London occupy the bottom 10 places of the rankings on space, with North London occupying last place with an index of 78.

Appendix 1: How the Happy at Home Index was conducted

The Happy at Home Index uses 12 measures to assess our happiness with where we live. The measures are split into three categories and weighted equally to produce a single index score.

The measures are formed as statements and asked as part of Rightmove's quarterly Consumer Confidence Survey. Only existing home-owners were asked, which gave us a sample size of 25,340 respondents. Respondents are asked to indicate the extent to which they agree or disagree with each statement using a scale of 0-10, where 0 is strong disagree and 10 strongly agree. Town and city locations were identified by each respondent's postcode.

YOUR PROPERTY		
1	DÉCOR	On whole, the décor and furnishings in my home are to my liking
2	SPACE	I do not have enough living space to live comfortably
3	CONTENTMENT	I think I would be happier if I could move to a better property
4	VALUE	I do not worry about the value of my property
YOUR HOME		
5	INVESTMENT	I rarely choose to spend money on my home unless I have to
6	WELL-BEING	Generally, I feel relaxed when I am at home
7	PRIDE	I feel proud of my home
8	COSTS	The cost of running my home often causes me to feel anxious
YOUR COMMUNITY		
9	SAFETY	I often feel unsafe in the community in which I live
10	AMENITIES	The local amenities are unsatisfactory compared to other areas I know
11	RECREATION	I enjoy spending time in the area in which I live
12	NEIGHBOURLINESS	Generally, the people who live in my area are friendly and polite