

Nelson-Tasman Housing We'd Choose

Housing Demand Preferences

June 2021
Version: FINAL

m.e
consulting



Prepared for

Nelson City Council and Tasman District Council

Document reference: TDC 002.21 HWC Tasman Nelson

Date of this version: 09 June 2021

Version: FINAL v2

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Executive Summary

As with other regions and areas across New Zealand, Nelson and Tasman regions are facing growth pressures and are assessing how to deliver housing solutions to address housing needs and affordability, while delivering well-functioning urban environments. The Nelson and Tasman region, with Nelson City as its core urban centre, is a high growth area, facing pressures from internal growth as well as from growth in retirees from further south, and from other areas in New Zealand.

Aligned with this growth are changes in the nature of households, their formation, and their needs. A desire to maximise the efficiency of urban space, reduce sprawl and consumption of highly productive lands, along with a belief that the current planning provisions are not delivering an appropriate mix of housing, means the councils are looking closely at what people need and want in terms of their dwelling choices and the forces working behind those choices. Through the use of planning provisions and with reinforcement from Central Government by way of the National Policy Statement on Urban Development, councils are aiming to ensure supply and demand are more closely aligned. Recognising a gap in their understanding of demand, Nelson/Tasman have commissioned this study into the housing choice process.


What did this research investigate?

The Housing We'd Choose study contributes a unique understanding of the demand side of the housing equation. This study collected the views of more than 600 residents across the Nelson and Tasman regions to understand what is important to them in choosing a place to live, and it has explored what types of housing they would choose to buy or to rent, if it were available, within their current income and financial constraints. The main difference between this study and previous research into housing preferences is that this research introduced 'real life' constraints on people's choices. As the report discusses in more detail, respondents were asked to choose between a variety of housing types, sizes and locations across the Nelson and Tasman regions, within their own financial constraints. These constraints were established using household and financial information that they provided during the survey.

Respondents were recruited by phone and invited to complete the online survey. Being online allowed presentation of unique visuals and allowed calculations of affordability to occur in real time, adjusting to respondents' answers throughout the process – again in real time. Efforts were made to ensure the survey sampled an appropriate cross section of Households. In total, 891 respondents indicated they were interested in taking part in the survey. Of those, some 622 completed the questionnaire. This equates to a completion rate of 70%. With an achieved sample size of 622, the results have a margin of error of +/- 3.9% at a 95% confidence level.

What did households choose?

It is clear from this study that residents in the Nelson and Tasman regions are generally willing to trade off both the type of dwelling and location, with dwelling price being a critical consideration. While the demand for stand-alone dwellings remains high, demand for attached dwelling, such as apartments, terraces and duplexes, is significant when compared to the supply that is being provided by the market.



The following are key findings of the demand preference survey:

- Respondents consider that the most important features of a dwelling are that it is **Safe from crime**, followed by having a **Freehold Title** and is **Sunny**. Other important features of housing include; **Safe from natural hazards** and that it is **Standalone**.
- In terms of location choice, there is a difference between unconstrained and constrained choice. The difference between the choices shows that financial constraints mean that respondents did not pick popular urban fringe areas (Stoke and Motueka) due to price. It would seem that respondents traded away from this location for other lower cost, potentially rural parts of the region due to prices being too high.
- The constrained choice data showed that some respondents currently living in stand-alone dwellings, would be willing to live within higher density dwelling types, mostly attached dwellings and some apartments.

1 Introduction

Within the Nelson and Tasman regions, as with other regions and growth areas across the country, there is considerable interest in the manner in which residential capacity is being supplied and enabled under District Plan planning provisions. There is a belief that demand for dwellings is exceeding the ability of the market to supply housing, resulting in significant house price increases and reductions in housing affordability. There is also a concern that the various planning provisions may not be providing an appropriate mix of housing by type, price and location to meet market demands. While it is important to understand the raw scale of growth in residential demand and capacity to meet that demand, it is as important to have a strong understanding of the type and nature of housing demand and more importantly, when presented with a range of choices and constraints, the trade-offs households are prepared to make to meet their needs.

This report is a study of housing preferences of the community that lives within and around the urban areas of Nelson and Tasman ('Urban Nelson-Tasman'¹). The research method applied in this study is a continuation of similar research called Housing We'd Choose ('HWC'), which has been conducted by Market Economics/Research First for other cities in New Zealand (Auckland², Dunedin³, Hamilton⁴) and Australia (Melbourne/Sydney⁵ and Perth⁶).

1.1 Purpose of report

Nelson City Council and Tasman District Council are currently preparing a Housing and Business Capacity assessment ('HBA') as required by the National Policy Statement on Urban Development ('NPSUD'). To inform the HBA the councils need to understand the choices households make in response to their housing needs. The ability to provide for sufficient housing, in places where people want to live, and where services can be provided in an efficient and effective manner, is a critical matter that the updated HBA and Future Development Strategy review ('FDS') will need to address.

In relation to housing, the NPSUD seeks to enable sufficient capacity to meet community demand for housing at a range of locations and dwelling types, and prices. The first objective of the NPS-UD is for "*New Zealand to have well-functioning urban environments that enable all people and communities to provide for their social, economic and cultural well-being and for their health and safety, now and into the future*". Therefore, provisions within planning documents need to provide for a range of residential opportunities such that all people can meet their needs. The final objective of the NPSUD is that "*New Zealand's urban*

¹ Urban Nelson-Tasman is defined as Nelson, Richmond, Brightwater, Wakefield, Mapua and Motueka. See Figure 3.3 for details on the spatial extents of each of the urban areas.


² Yeoman, R. and Akehurst, G. (2015). The Housing We'd Choose: A study of housing preferences, choices and trade-offs in Auckland. A report prepared by Market Economics Limited for Auckland Council.

³ Akehurst, G. (2019). Housing Framework Predictions: The Housing We'd Choose. A report prepared by Market Economics Limited for Dunedin City Council.

⁴ Akehurst, G., Tucker, M., Yeoman, R. and Ashby, H (2020) Future Proof sub-region Housing Study: Demand Preferences and Supply Matters.

⁵ Kelly, J.F., Weidmann, B., and Walsh, M. (2011). The Housing We'd Choose. Melbourne, Australia: Grattan Institute.

⁶ Department of Housing & Department of Planning. (2013). The Housing We'd Choose: a study for Perth and Peel. Perth: Government of Western Australia.



environments; (a) support reductions in greenhouse gas emissions.” In this context that means planning provisions should be designed to support development, largely intensification and higher density forms of housing close to centres and transport nodes, thereby reducing the transport friction that generates greenhouse gas emissions and commuter time. The purpose of this piece of research is to understand how households trade off higher priced stand-alone dwellings in more remote suburbs against more intensive forms of dwellings (Terraced houses, duplexes and apartments) that are significantly closer to places of high urban amenity (such as centres, work areas, the river, parks and social infrastructure).

The second objective of the NPSUD supports future housing development (and intensification) by seeking to ensure that planning decisions improve housing affordability by supporting competitive land and development markets. The NPSUD incorporates a new focus on offering people access to a choice of homes that meet their dwelling needs or demands, as well as providing access to jobs, opportunities for social interaction, high-quality diverse services, and open space. There is a focus on providing a range of dwelling types and locations, which include significant intensification within walking distance of large centres (central city).

Nelson City Council and Tasman District Council have significant data and models of household growth translated into housing units projected to be needed over the next 30 years. This shows where and how they are looking to provide for demand however, very little research has been carried out into people’s housing preferences. Nelson City Council and Tasman District Council decision makers do not have a clear idea of preferences in terms of; housing attributes, preferred environments and the relative importance of all dwelling and locational characteristics households weigh up when making a housing decision. Finally, and importantly, there is virtually no research to date that explores the kinds of trade-offs households may be willing to make if they can’t meet all of their preferences in a way that is affordable to them. The Housing We’d Choose research is seeking to better understand these trade-offs.


Tasman and Nelson Councils, will also use the report to provide evidence for the individual Resource Management Plans (RMA), which are currently at different stages of preparation, to inform the scale of zoning for different types of residential in its District/City.

1.2 Scope of report

The scope of the research was to investigate housing preferences in the Urban Nelson-Tasman area. The following objectives were noted by Nelson City Council (‘NCC’) and Tasman District Council (‘TDC’):

- Establish research specific to the Urban Nelson-Tasman area;
- Establish a better understanding of what is important to people in the Urban Nelson-Tasman area when choosing a place to live;
- Exploring the type and location of housing that people would choose to live in, if the options were available, based on real-world constraints; and
- Comparing existing housing stock and what is coming online (currently being built, or planned to be built), with what people say they would choose if they could.

The scope of this report was to focus on new housing within the private market, primarily for purchase by owner occupiers or for rental. It is acknowledged that there is a housing continuum which includes non-market housing types, such as social housing, papakāinga and co-housing. It was beyond the scope of this report to test the preferences of households that are not catered for in the private market. We consider



that a separate study of household needs within this segment of the community would be valuable. However, such a study may be outside the purview of local government and therefore likely to be more appropriately handled by central government, iwi and other community providers who control most non-market housing.

Market Economics has led a team to undertake two sets of research to meet these objectives. First, was to collect secondary data on the households and dwellings within Nelson-Tasman regions, along with other relevant secondary data. This information was used to define the survey population, sub areas of interest within the Nelson Tasman Urban Area, dwelling typology, sales/rents of these dwellings and mortgage calculator (economic research by Market Economics).

Second, to take the information from the economic research to design a survey script that would collect primary data on the housing preferences of the community (a survey conducted by Research First Ltd).

Finally, develop a short report that provides results from the research streams. In other HWC research Market Economics has conducted post survey modelling, which has included;

- 1) statistical analysis of relationships that exist in the primary data. This would take the form of building a discreet choice model or conditional logit model that provided insight into what was driving trade-offs.
- 2) projections of housing demand based on the preferences observed in the primary data.

The team would be available to provide additional economic research if required into either of these areas.

1.3 Structure of report

This report is structured as follows:

- **Section 2 – Nelson-Tasman Housing Market**, provides a discussion on the current housing market in Nelson-Tasman area which briefly discusses the dwelling stock (both existing and new), dwelling sales prices and rents and some aspects of the community (demographics and household types). This discussion provides context about the market conditions, demand and supply, which exist within the Nelson-Tasman area.
- **Section 3 – Housing We’d Choose Method**, outlines a summary of the key steps undertaken in the research. This methodology has been applied by Market Economics and Research First to many of the high growth urban areas in New Zealand.
- **Section 4 – Demand Preferences Survey**, presents the responses that were observed in the survey, both in terms of unconstrained preferences and constrained preferences.
- **Section 5 – Conclusions**, provides a summary of the report’s findings.

2 Nelson-Tasman Housing Market

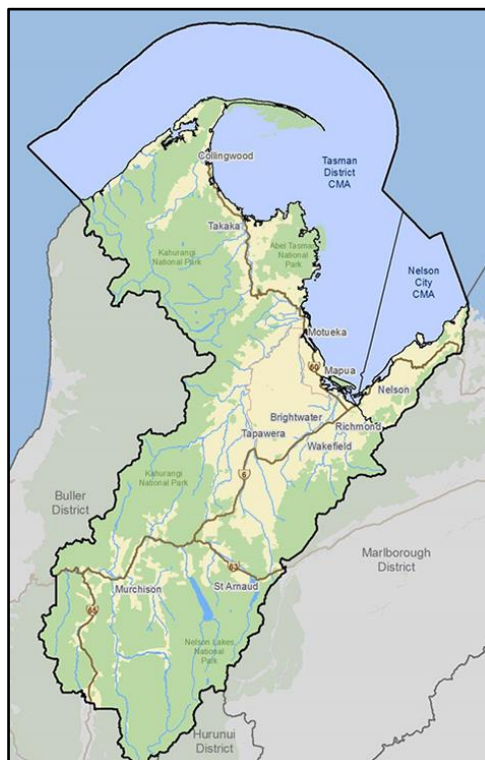
2.1 Background

The Nelson and Tasman regions are renowned for receiving the most sunshine hours in New Zealand. The regions are located in north-westerly part of the South Island, which means that they are sheltered from cold weather systems arriving from the south (Figure 2.1). Unsurprisingly the regions have experienced rapid growth, from both international and internal migrants moving to live in the area.

The population growth in Nelson City and Tasman District has been faster than most of the other areas in New Zealand. Tasman District's population grew by 2.4%, or 1,300 residents in the last year, while Nelson City's population grew by 1.9% or 1,000 residents. In total, the two areas now have a population of 111,000 residents.⁷ It is likely that Nelson and Tasman region will continue to grow strongly in the coming decades. The official projections suggest that another 30,000 people may locate in the regions over the coming three decades.⁸


Growth pressures have extended out from Nelson into the urban parts of Tasman region, with large scale developments occurring around many of the towns in Tasman – Richmond, Brightwater, Wakefield, Mapua and Motueka. Nelson City has also experienced strong growth, which has mainly occurred within the existing urban area.

Figure 2.1: Map of Nelson and Tasman Regions



⁷ Stats NZ (2020) Subnational population estimates (TA, SA2), by age and sex, at 30 June 1996-2020 (2019 boundaries).

⁸ Stats NZ (2021) Population projections, by age and sex, 2018(base)-2048 – high projection.



A key concern of the councils is to understand how best to accommodate growth. Specifically, how best to encourage growth in forms that best meet the demands of households while achieving the objectives of the NPSUD and the various plans and strategic documents that outline the regions' future. A key driver for both councils is how to provide a diversity of housing options and what does this diversity look like. The councils want to understand how households will respond to a range of dwelling typologies, prices and locations and most importantly, the trade-offs households will make to achieve either locational preference or to maximise their private amenity in another manner.

Specifically, what types of dwellings and what locations should be encouraged within the regions. For the purposes of this study and to ensure that the findings of the research are able to be applied to council's HBA reporting under the NPS-UD, the focus is on the Nelson Tasman Urban Environment. However, it is recognised that this market operates in a wider sub-regional context – especially because the distances involved are not significant from some of the 'rural' hinterlands into the core urban zones. This means that the trade-offs households may be making in terms of trading more distance for a lower cost dwelling are not necessarily onerous.

2.2 Housing Supply

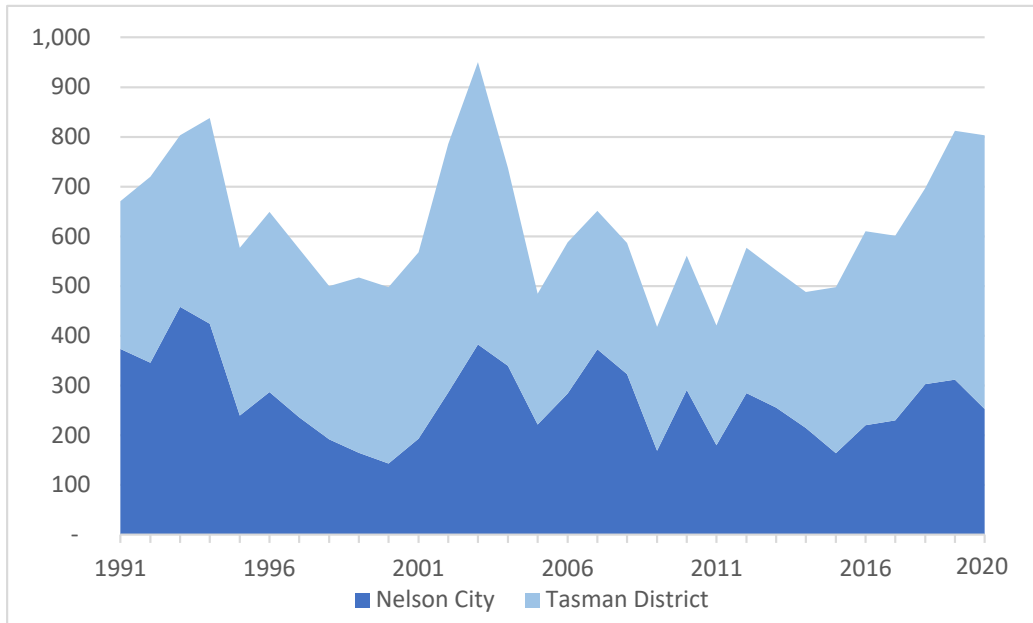
Dwelling consents data⁹ suggests that the number of new dwellings built in the Nelson and Tasman regions peaked in early 2000 at around 950 per annum, then declined to a little over 400 per annum around 2009-2011 and has since recovered to over 800 per annum in 2020 (see Figure 2.2). While there was a significant decline in new dwelling consents during the Global Financial Crisis, supply has recovered strongly over the last decade reaching record levels in Tasman last year¹⁰. Figure 2.2 also shows that the role of Nelson and Tasman regions has switched, with Nelson issuing more consents in the first 5 years (1990 – 95), but with Tasman District playing the major role in supplying new dwellings from then on (58%) and Nelson providing the balance (42%).

The dwelling consent data indicates that since 1991, there has been a fairly constant split between Urban and non-urban development. In total, over the 30 years around 75% of consents have been issued in the Nelson Tasman Urban Environment and 25% in rural areas. Over the last 5 years it has averaged 78% urban, but this is similar to the 1991 – 95 period where 79% of consent were urban.

⁹ Statistics New Zealand, February 2021, Building Consents issued: December 2020

¹⁰ Year ending March 2021, Tasman recorded a record 601 building consents issued

Figure 2.2: New Dwelling Consents Nelson and Tasman Regions, 1991-2020

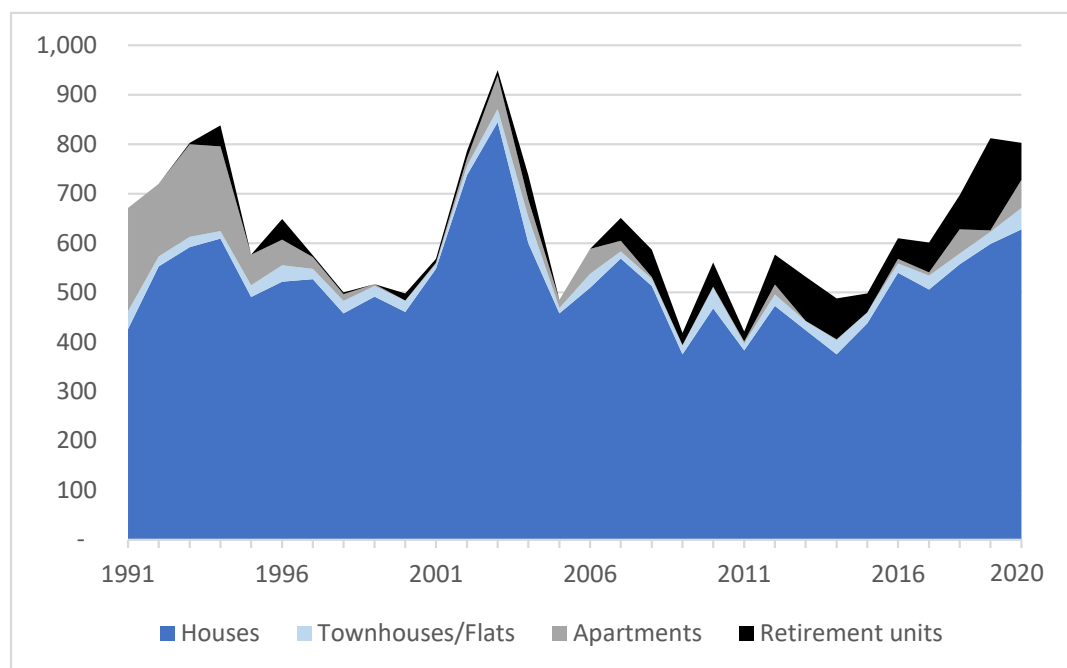


Source: Statistics New Zealand

The types of dwellings consented in the Nelson and Tasman regions have changed over the last three decades, with a growing share being retirement units and a decline in apartments in Nelson City. The number of retirement units as a share of the total has increased from 2% in the 1990 – 94 time period to almost 12% over the past decade (2010 – 2020). Apartments on the other hand have declined, with over 840 issued in the 1990 – 94 period in Nelson, declining to 27 in the 2010 – 14 period before rising to 125 between 2015 and 2020. Townhouses/flats as a share have remained fairly stable across each TA. In both cases they represent around 4-5% of total consents issued. Their share peaked in Nelson during the late 1990's early 2000's at 6% share. While both low- and high-density dwelling consents have increased significantly since the GFC, there has been much more growth in consents for high density units. It is likely that Tasman has only medium density, while Nelson will have both medium density and high density.

In addition, much of the change in dwelling types has occurred in the last five years and has been driven by the developments of retirement units.

Figure 2.3: Types of New Dwelling Consented Nelson and Tasman Regions, 1991-2020



Source: Statistics New Zealand Building Consents by SA2, 1990-2020

Figure 2.3 highlights recent growth in importance of more intensive forms of residential accommodation within the Nelson and Tasman regions – in particular retirement accommodation. This growth has mostly occurred over the past five years (2015 – 2020). The growth in more intensive forms is also concentrated spatially into Nelson. In 2009, Nelson consented 24 retirement units and 0 apartments. By 2020 this had grown to 48 retirement units and 57 apartments – although the intervening years the data is lumpy. Tasman District in this time had an increase from 16 Townhouses/Flats, 0 retirement units and 1 apartment in 2009 to 38 townhouses and 27 retirement units in 2020 (Table 2.1). Table 2.2 presents the same data but cut according to the Nelson Tasman urban rural divide.

Interestingly for Nelson City, while there has been an increase in consents for apartments over the past 6 years (2015-2020), up to 125 issued compared with only 27 in the previous 5 years (2010 – 2014), the number of retirement units has declined slightly (down to 241 over the past 6 years versus 266 for the previous 5). Standalone dwellings are also growing strongly with over 1,060 consents issued from 2015 – 20, compared with 860 from 2010 – 2014.

In Tasman District, the total number of consents has increased to almost 2,540 (over the 2015-20 period). This is almost double the number issued between 2010 and 2014 (1,350 an 87% increase). However, consents for standalone houses have increased by 75% between these 2 periods. Tasman has experienced a significant increase in consents for Retirement Village Units (up to 229 from 2015 – 2020, up from 36 between 2010 and 2015).

This means standalone houses as a share of total consents is dropping slowly over time. IN the 2000 – 2004 period they made up 90% of building consents issued, by the 2015 – 2020 period they accounted for 81% of the total. has dropped from 83% to 78% in the combined Nelson and Tasman regions .

Table 2.1: Nelson and Tasman Regions Dwelling Consents by Type, 1990 - 2020

Years	Nelson				Tasman			
	Houses	Apartments	Retirement village units	Townhouses, flats, units, other	Houses	Apartments	Retirement village units	Townhouses, flats, units, other
1990 - 94	981	846	0	65	1,530	14	59	85
1995 - 99	878	153	20	69	1,612	3	28	55
2000 - 04	1,098	110	55	82	2,093	12	42	47
2005 - 09	1,141	91	110	29	1,284	1	16	57
2010 - 14	862	27	266	72	1,261	1	36	54
2015 - 20	1,061	125	241	55	2,206	0	229	104
Share of Each TA Total								
1990 - 94	52%	45%	0%	3%	91%	1%	3%	5%
1995 - 99	78%	14%	2%	6%	95%	0%	2%	3%
2000 - 04	82%	8%	4%	6%	95%	1%	2%	2%
2005 - 09	83%	7%	8%	2%	95%	0%	1%	4%
2010 - 14	70%	2%	22%	6%	93%	0%	3%	4%
2015 - 20	72%	8%	16%	4%	87%	0%	9%	4%

Source: Statistics New Zealand's, Building Consents by SA2

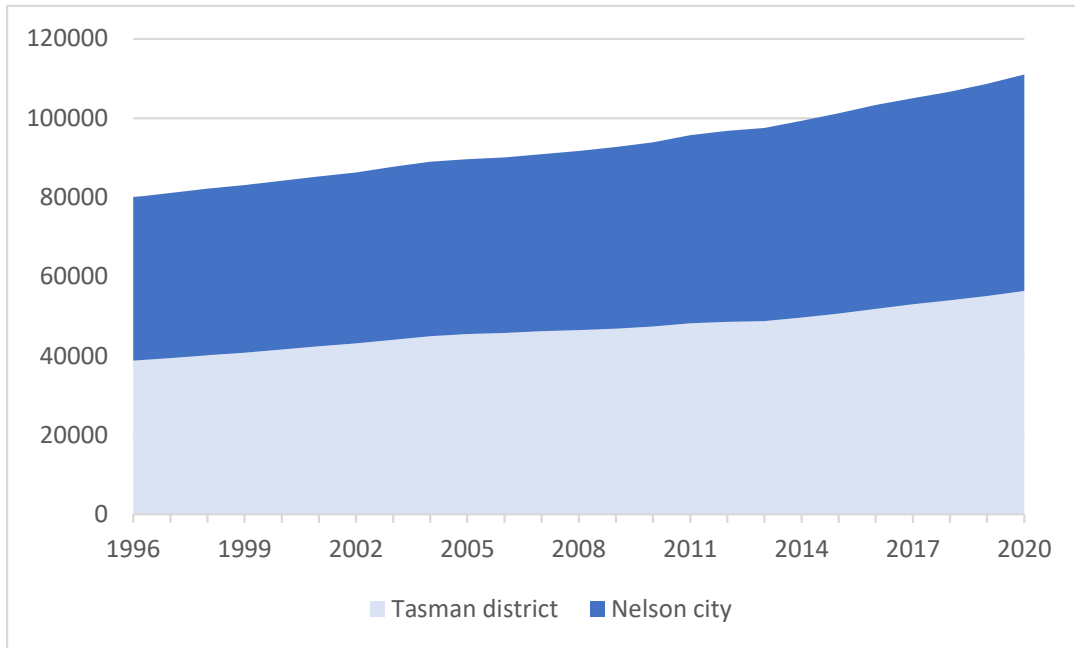
Table 2.2: Study Area Urban and Rural Dwelling Consents by Type, 1990 - 2020

Years	Nelson Tasman Urban Environment				Rural Areas			
	Houses	Apartments	Retirement village units	Townhouse s, flats, units, other	Houses	Apartments	Retirement village units	Townhouse s, flats, units, other
1990 - 94	1,793	854	59	116	718	6	0	34
1995 - 99	1,787	153	48	102	703	3	0	22
2000 - 04	2,216	110	97	98	975	12	0	31
2005 - 09	1,688	91	126	49	737	1	0	37
2010 - 14	1,484	27	302	111	639	1	0	15
2015 - 20	2,412	125	470	129	855	0	0	30
Share of Each TA Total								
1990 - 94	64%	30%	2%	4%	95%	1%	0%	4%
1995 - 99	86%	7%	2%	5%	97%	0%	0%	3%
2000 - 04	88%	4%	4%	4%	96%	1%	0%	3%
2005 - 09	86%	5%	6%	3%	95%	0%	0%	5%
2010 - 14	77%	1%	16%	6%	98%	0%	0%	2%
2015 - 20	77%	4%	15%	4%	97%	0%	0%	3%

2.3 Housing Demand

Over the past 25 years, the Nelson and Tasman regions have grown strongly. Between 1996 and 2020 they have grown by approximately 40% or by around 31,000 residents, collectively. The majority of growth occurred in Tasman district (57%), where population grew by 17,600 between 1996 and 2020. Nelson City grew by 13,400 people over this period, which is 43% of the regions' growth.

Figure 2.4: Population Growth 1996 – 2020, Nelson and Tasman Regions



Source: Statistics New Zealand, Subnational Population Estimates 30 June 1996 - 2020

2.4 Housing Market Prices

Housing Demand has increased markedly in the Nelson and Tasman region. Since 2003 house prices have more than doubled, from \$310,000 to over \$680,000 for the median house.¹¹ **Compared with six years ago, since March 2015 median house prices in Tasman have increased by around 64%**¹². This trend has been fairly consistent across the two regions, however prices in Nelson have been marginally higher than Tasman. Nationally, the median house price has increased at a faster rate than in the Nelson and Tasman regions. This is mostly driven by strong growth in Auckland and its high volume causing Auckland growth rates to drive the New Zealand national average.

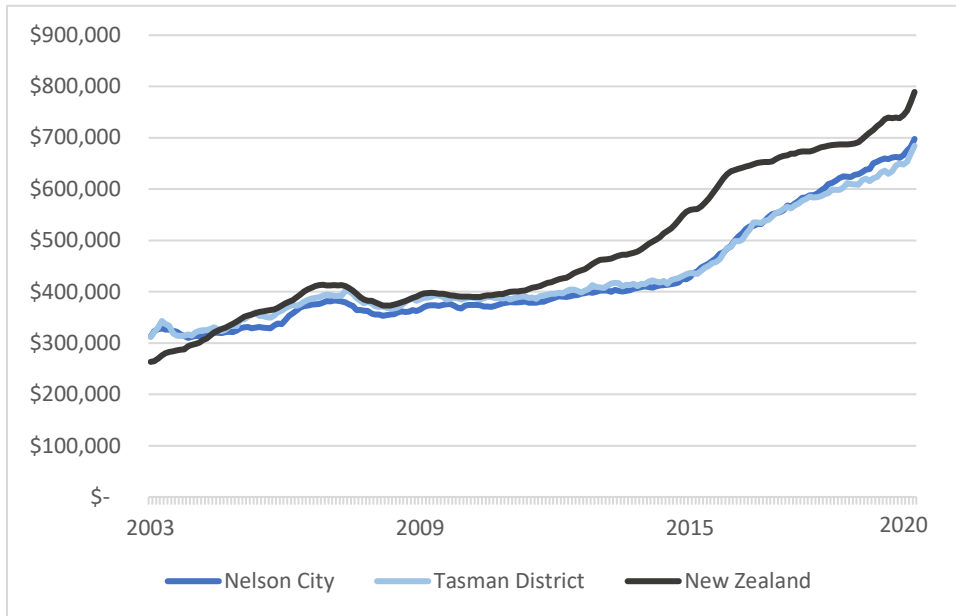
Embodied in this growth is a general price rise (CPI). Over the same time period prices in general have increased by 40%, meaning that House Price inflation in the Nelson and Tasman region is almost 3 times general inflation (over the same time period). This is a significant level of price change, yet below the national average which is driven by Auckland growth.

¹¹ Corelogic (2021) 12-month rolling Dwelling Sales Price (actual) – median price series.

¹² Ministry of Housing and Urban Development, Dashboard



Figure 2.5: Median House Prices Nelson and Tasman Regions, 2003-2020



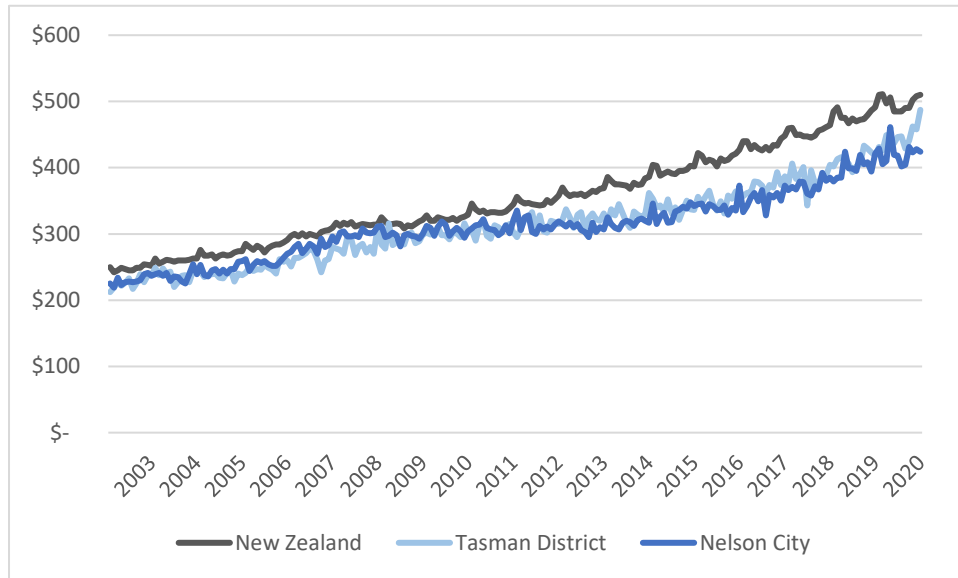
Source: Corelogic (2021) 12 month rolling Dwelling Sales Price – median price series

Demand for rental properties has also been strong in the Nelson and Tasman regions. However, weekly rents have increased by a smaller amount relative to house prices. The average weekly rent increased from \$240 per week in 2003 to over \$450 per week in 2020.¹³ Interestingly, rental prices have not moved as far or as fast as house prices as rental prices are more likely to be driven by the need for a place to live, therefore driven more by population growth. House prices are also driven by things other than the drive to have somewhere to live. Housing’s role as an investment means prices are tied to capital markets or the price of other investment goods, interest rates, tax policy and so on.

In the Nelson Tasman area, over the same time period, rentals have almost doubled – which is roughly one-fifth slower than the rate of house price growth.

¹³ MBIE (2020) 12-month rolling Dwelling Rents (actual) – nominal mean rents private bond lodgement.

Figure 2.6: Median Weekly Rental Nelson and Tasman regions, 2003-2020



2.5 Findings on the Housing Market Situation

The Nelson and Tasman regions have experienced rapid growth, which has resulted in key changes in the housing market and housing policy. This growth is expected to continue in the coming decades, with potential for 30,000 new residents living within regions under the Statistics New Zealand High growth future (2018 – 2048)¹⁴. Growth will place pressure on the urban areas within the regions.

Discussion in this section provides the following key findings about the housing market,

- Consent data indicates that the market has been shifting to supply greater numbers of higher density dwellings, townhouses, flats, apartments and retirement units. Over 22% of new supply is now in these higher density typologies.
- The location of consents has changed over the last three decades, with Tasman district playing a greater role (57%) and Nelson City reducing in importance (43%).
- The majority of growth remains within the Nelson Tasman Urban Environment which has captured 75% of dwelling consents over the past 25 years. This split is reasonably stable on a year to year basis.
- Sales data shows a significant increase in prices over the last two decades, from \$310,000 to over \$680,000 for the median dwelling. This rapid increase in prices indicates that housing demand has been strong in the regions.
- Rental costs have grown, albeit at a slower rate compared to the sales data. The average weekly rent has increased from \$240 per week to over \$450 per week.

Housing policy has responded to the changing housing market. The implementation of two National Policy Statements has required councils to provide sufficient capacity for housing within Regional Policy Statements and District Plans.

¹⁴ Statistics New Zealand's Population Projections, 2018 (base) – 2048.



3 Housing We'd Choose Method

This chapter briefly outlines the data collection methods used in this study. The content provided here is intended to provide the reader with a broad understanding of the techniques used. Further detail is provided in the appendices and Research Firsts' technical report.

3.1 Survey Method

The primary research utilised a mixed-method research design, as it involved initial telephone recruitment of the sample population, who (subject to meeting certain criteria) were invited to complete a survey online. Respondents were asked to agree from the outset to complete the survey. In the initial telephone contact, the purpose of the research was outlined, and people were offered an incentive to participate, in line with standard market research practise. If they agreed, they were then communicated with by email.

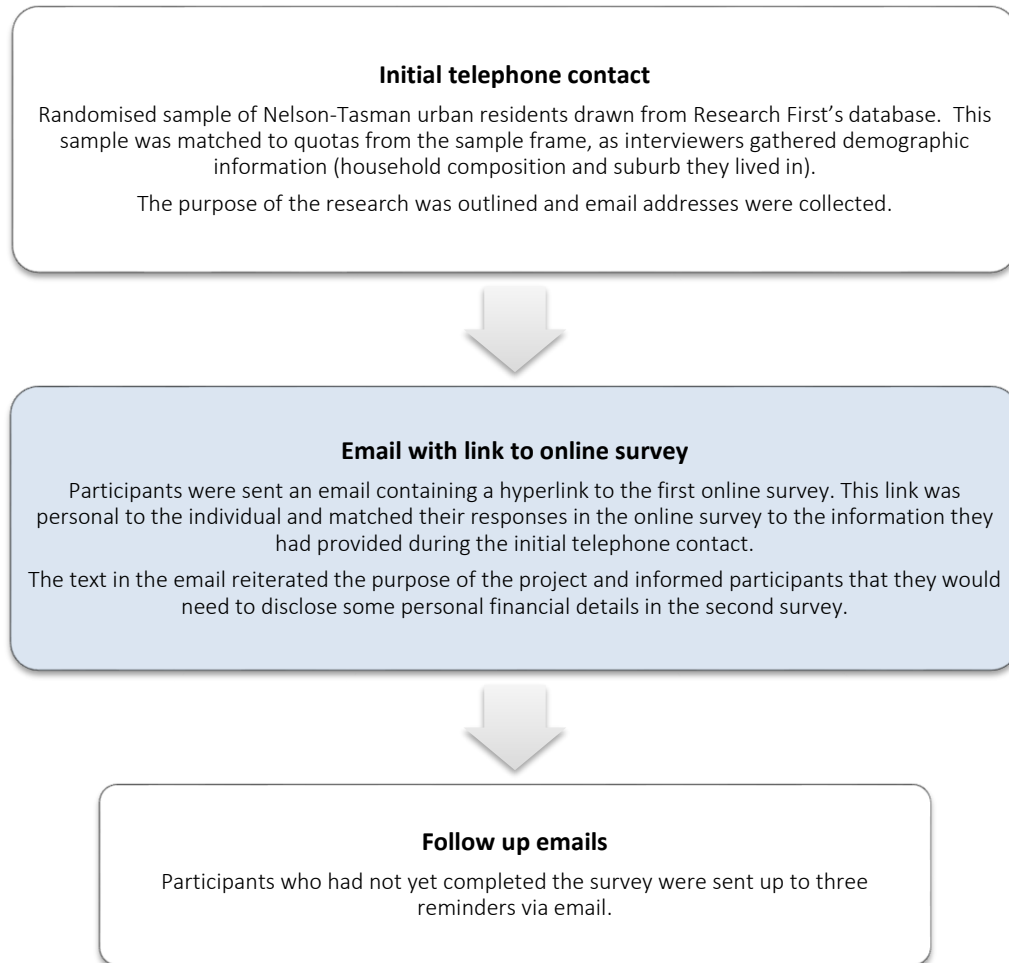
An online surveying method was used, for a variety of reasons. First, it is not possible to display the visual or the dynamic components of the survey using traditional methods (such as telephone or hard copy). In addition, online data collection is cost-effective, as there is no interviewer presence and labour costs are minimised; and it allows respondents to complete the survey in their own time, which can maximise response rates. The survey combines what had previously been 2 surveys into a single package using the online interview suite NEBU.

An overview of the data collection process is shown in Figure 3.1.

The second part of the survey required respondents to undertake a discrete choice experiment in which they had to trade-off housing type, size, and location within 'real world' financial constraints base on the answers they provided in the first part of the survey and a house price and rental cost framework by location and type developed by M.E from Nelson and Tasman specific housing costs.

The fieldwork took place in March and April 2021 and was administered by Research First.

Figure 3.1: Overview of data collection process



3.2 Survey Sample

In total, some 14,309 people were contained in the sample. Of these some 891 indicated that they were interested in taking part in the survey. This represents a response rate of 6%. Of these, approximately 622 respondents completed the survey for a completion rate of 70%. As further outlined in Chapter 4, there were several points at which respondents could be ‘exited’ from the online survey however, and a total of 450 respondents completed the discrete choice experiment. Regardless of whether respondents completed the fulfilled discrete choice experiment, they provided information about their preferences and who they were. This important information has been retained.

Efforts were made during recruitment and sampling to ensure that the final sample represented a variety of household types across Nelson-Tasman urban area, as it was considered by the research team that household composition plays a key role in driving housing needs and requirements. The survey was split between the two regions. In total 315 interviews were carried out with Nelson urban respondents, and 219 in Tasman urban (Figure 3.2).

Details of error margins are contained in Appendix A. However, overall the Survey has a confidence level of +/-3.9%. This is inside the maximum recommended for these types of surveys (+/-5%). Once the sample is split between the two regions, the error margins increase (see Appendix A). This limits (to a certain

extent), the reliability of smaller sub-samples and conclusions drawn from them for small towns in Tasman when viewed in isolation. However, the collective values still apply.

Figure 3.2: Locations – Population, Quota’s and Completed Surveys

Location	Household Estimates	Quota	Surveys Complete	% of Population	% of Survey Respondents
Nelson					
Nelson Urban	19,112	289	315	96%	95%
Nelson Rural	710	11	17	4%	5%
Subtotal	19,822	300	332	100%	100%
Tasman					
Tasman Urban	11,017	240	219	56%	76%
Tasman Rural	8,535	60	71	44%	24%
Subtotal	19,552	300	290	100%	100%
Nelson Tasman Urban Environment	30,129	529	534	77%	86%

Source: Research First, Housing Preferences Study, Technical Report, May 2021

In addition, despite best efforts, households with children were under-represented in the final sample, while couples without children were over-represented. With respect to individual characteristics of the respondents, it should be noted that Māori, Pacific, and Asian people, and those in younger age groups (29 years and under) and less wealthy (under \$30,000 income) were also under-represented, when compared to the general population. For an overview of the survey sample characteristics please refer to Appendix B.

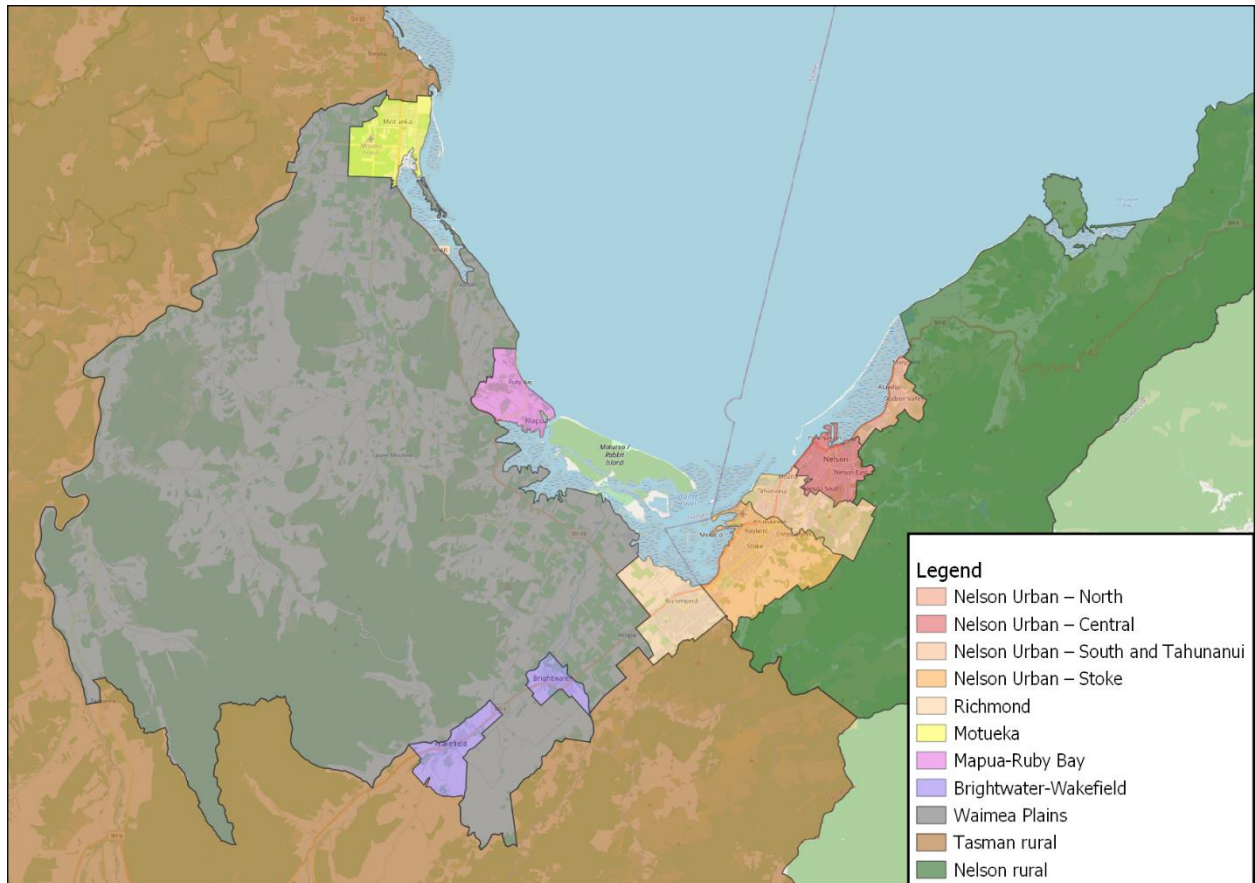
3.3 Survey Sectors

For the purposes of sample selection and the discrete choice experiment, the Nelson and Tasman regions were divided into eleven ‘sectors’ according to land value and spatial location, with the goal of defining a limited number of markets. The sectors are as follows (also refer to map in Figure 3.3):

- **Sector 1: ‘Nelson Urban - Central’**, which covers the City centre and inner suburbs of Nelson.
- **Sector 2: ‘Nelson Urban - North’**, which covers the north suburbs of Nelson.
- **Sector 3: ‘Nelson Urban - South and Tahunanui’**, the suburbs south of Nelson central, which includes Tahunanui.
- **Sector 4: ‘Nelson Urban - Stoke’**, the urban area around Stoke up to the edge of regional boundary.
- **Sector 5: ‘Richmond’**, the urban area around Richmond.
- **Sector 6: ‘Motueka’**, the urban area around Motueka.
- **Sector 7: ‘Wakefield-Brightwater’**, two townships of Wakefield and Brightwater.
- **Sector 8: ‘Mapua-Ruby Bay’**, the township of Mapua and the coastal area north of the town (Ruby Bay).
- **Sector 9: ‘Waimea Plans’**, which covers the rural land in the Waimea Plans, which surrounds the towns in Tasman region.

- Sector 10: 'Tasman Rural', the remainder of the rural area in Tasman region.
- Sector 11: 'Nelson Rural', the remainder of the rural area in Nelson region.

Figure 3.3: Survey Sectors within Nelson and Tasman Regions




Each sector covers many suburbs, which have some unifying characteristics and geography, but also have very different characteristics. In order to identify which sector respondents lived in, they were asked what suburb they lived in and were later allocated to a sector during the data analysis stage.

The selection of eleven sectors was a compromise between providing sufficient detail and difference across parts of Nelson and Tasman regions for the choice modelling, and being succinct enough to ensure the questionnaire was not onerous. The previous Australian and New Zealand studies used similar numbers of spatial sectors and used land value as a tool to delineate boundaries between sectors.

3.4 Survey Structure

The survey was structured in two separate parts, telephone invitation and online survey.

The telephone invitation was short, with only seven questions. Many of the questions act as a filter to removing respondents that are not the target of the survey (market researchers, people 18 years and younger, non-residents) or who do not want to participate in an online survey. The remaining questions collect information about the respondent, which includes the household make up, suburb, first name and



email address. The respondents that successfully passed the invitation criteria were then sent an email with a link to the online survey.

The online survey asked a range of questions about preferences for housing, which includes questions that are both unconstrained and constrained by respondents' financial information. The Survey is separated into the following five sections,

- **Section 1: About Your Current Situation**, collects information about the respondents current housing situation. The respondents were asks questions about their current dwelling, type (stand-alone, attached, apartment, etc), ownership (occupier, rent, etc), length of tenure, intentions to move (with location considered) and motivation for move.
- **Section 2: About your Preferred Housing Features**, examines how important various features are to respondents when thinking about choosing a place to live. The respondents were asked to rate the importance of features of housing on a three-point scale of Not Important, Of some importance and Very important.
- **Section 3: Living and Working**, which collects information about the respondent's current address, where they work and where they would prefer to live in the Nelson and Tasman regions.
- **Section 4: Financial Situation**, collects information about household composition, income, expenses, liabilities, and assets. This information is used to establish the maximum amount that the respondent's household can afford to buy, or to rent.
- **Section 5: Choice Experiment**, this section of the survey shows the respondent four sets of dwellings that the respondent can afford to buy or rent, with the options shown being constrained by the financial situation of the respondent. The respondent was shown the four dwellings that they selected and asked to select which of the dwellings best reflects the housing they would choose.

This report focusses on the results in Section 2 and Section 5 of the online survey. Section 2 asks respondents about their housing preferences, in terms of types of features i.e. what dwelling would you like? Section 5 constrains the respondent preferences based on their financial position, i.e. what dwelling can you afford? The choice experiment tests how respondents undertake trade-offs when deciding which house to buy?

4 Demand Preferences Survey

In this section of the report, we summarise some of the key findings of the Housing Preferences Survey. First, we explore housing preferences to establish what households are seeking when selecting a dwelling. Household preferences at the conceptual level are then translated into a real-world selection process. In the first instance households are asked to select where they would choose to live in terms of dwelling type and location in an unconstrained way. Finally, they are asked to repeat the process with financial constraints derived from their responses. The outcomes are then compared to provide insight into the manner in which households trade off size, space and location once they are not able to have it all.

The focus in this section is on responses from Nelson Tasman Urban Environment respondents, so respondents from the rural areas have been excluded.

4.1 Current Situation

The majority of the urban respondents stated that they currently lived in stand-alone dwellings (85%), while 11% lived in a unit or a semi-detached dwelling, 2% lived in an apartment and 2% live in other dwellings.¹⁵

Home ownership was relatively high among the sample. Over two thirds (77%) of respondents owned the dwelling they lived in, either with or without a mortgage, and a further 7% stated that a family trust owned the dwelling (it is not possible to ascertain from the results however, whether the person completing the survey was part of that family trust). About one in five (13%) were renting from a private landlord and 3% renting from a community housing provider (Kāinga Ora, Ministry, iwi, a religious group, or a community group). The ownership distribution was the same for Nelson and Tasman respondents.


Before being asked to rate what was important to them in choosing a place to live, respondents were asked whether they were planning to move in the next five years, and if so, where to and why. Many were not planning on moving (49%), with almost a quarter indicating that they were considering moving (24%) and the rest (27%) were unsure.¹⁶

Of those respondents who stated they were considering moving in the next five years, over two thirds (67%) said they were thinking of moving within Nelson and Tasman area, and 17% said they would move outside of Nelson and Tasman area, while the rest (16%) were unsure.

Reasons for considering a move were mixed. For example, while 30% of survey respondents stated that they would move if they had a change in their personal circumstances, 10% said they would consider a move to a better location, 19% would consider a move to a smaller home if they were to move, a further

¹⁵ Nelson Urban - stand-alone dwellings (83%), while 13% lived in a unit or a semi-detached dwelling, 2% lived in an apartment and 2% live in other dwellings. Tasman Urban - stand-alone dwellings (88%), while 11% lived in a unit or a semi-detached dwelling, 2% lived in an apartment and 2% live in other dwellings.

¹⁶ The plans to move was more or less the same for Nelson and Tasman respondents.



8% said they wanted to move to a bigger home. Approximately half of renters wished to move from renting to buying a home.

Of the people who provide free text reasons for moving many referenced the following reasons; shift to retirement villages, wish to build, or live on a lifestyle block. Many of the respondents had individual reasons for wanting to shift, such as travel, gardens, a missing characteristic of existing house, etc.

4.2 What is Important to Households?

The respondents were asked to rate the importance of features of housing on a three-point scale of Not Important, Of some importance and Very important. The “features of housing” include; its location, facilities, environment, and the nature of the property. The respondent was then asked to rank the group of features that they selected as ‘Very Important’.

The set of features respondents could choose from have been drawn from both the HWC studies carried out in other parts of the country and to reflect local conditions. In the original Auckland work, the selection set of housing and locational attributes was generated through focus groups held across the city. Respondents were asked to identify the range and list of attributes that might be important to them when thinking about choosing a place to live. The set of attributes was generic enough to be applied more generally to studies of this nature. In subsequent studies, there was a good alignment between the list of selection attributes and the choices people felt they would make.

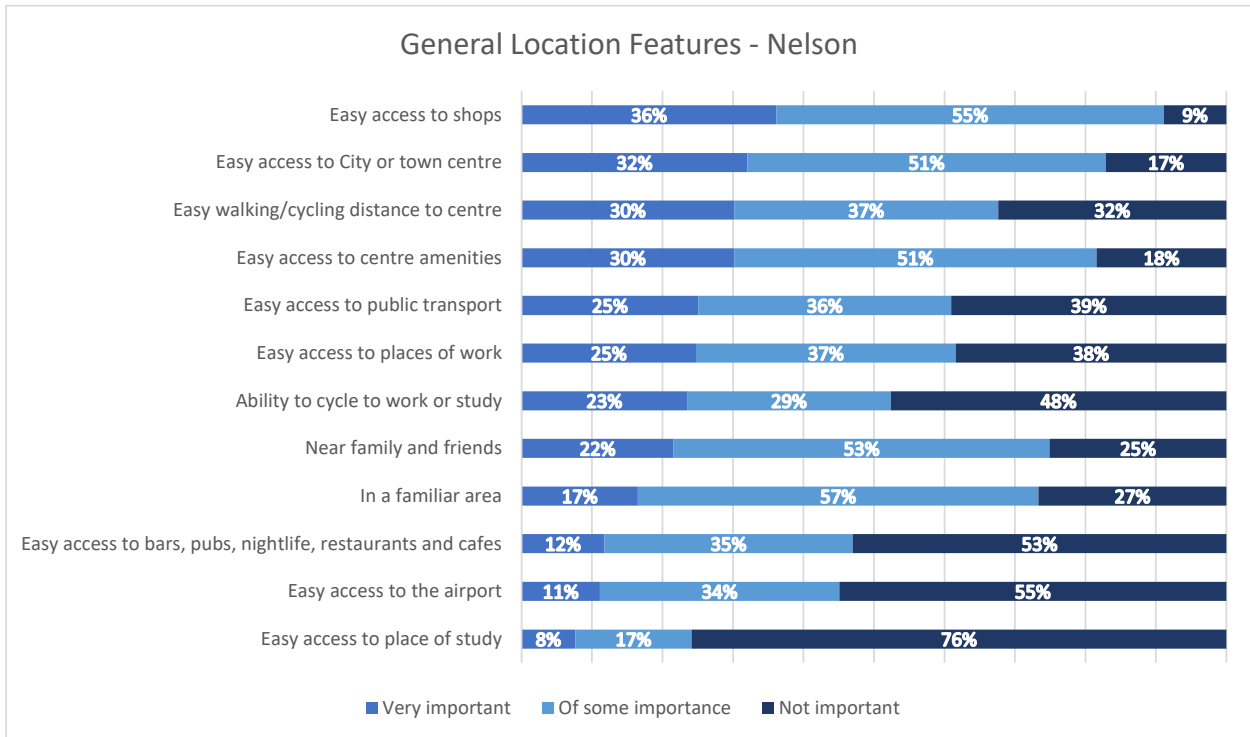
4.2.1 Location Features

The 12 features in this category related to ease of access to work, school, tertiary education facility, family and friends, restaurants and bars, as well as transport options. Because there is no universal measure of “easy access to”, the survey relied on each respondent to translate “easy access to...” in their own way relative to their own situation. However, overall, these characteristics did not rate highly relative to the features in other categories.

The item rated as most important among these features was **easy access to shops** – over a third rated this as being very important (Figure 4.1 and Figure 4.2). Other important features include being **near family and friends**, **access to town centre** and **access to places of work** was very important for 20-30% of respondents. In summary, the Nelson respondents placed more importance on the location features than Tasman respondents. However, interestingly Tasman respondents placed higher importance on being **near family and friends**, than Nelson respondents.

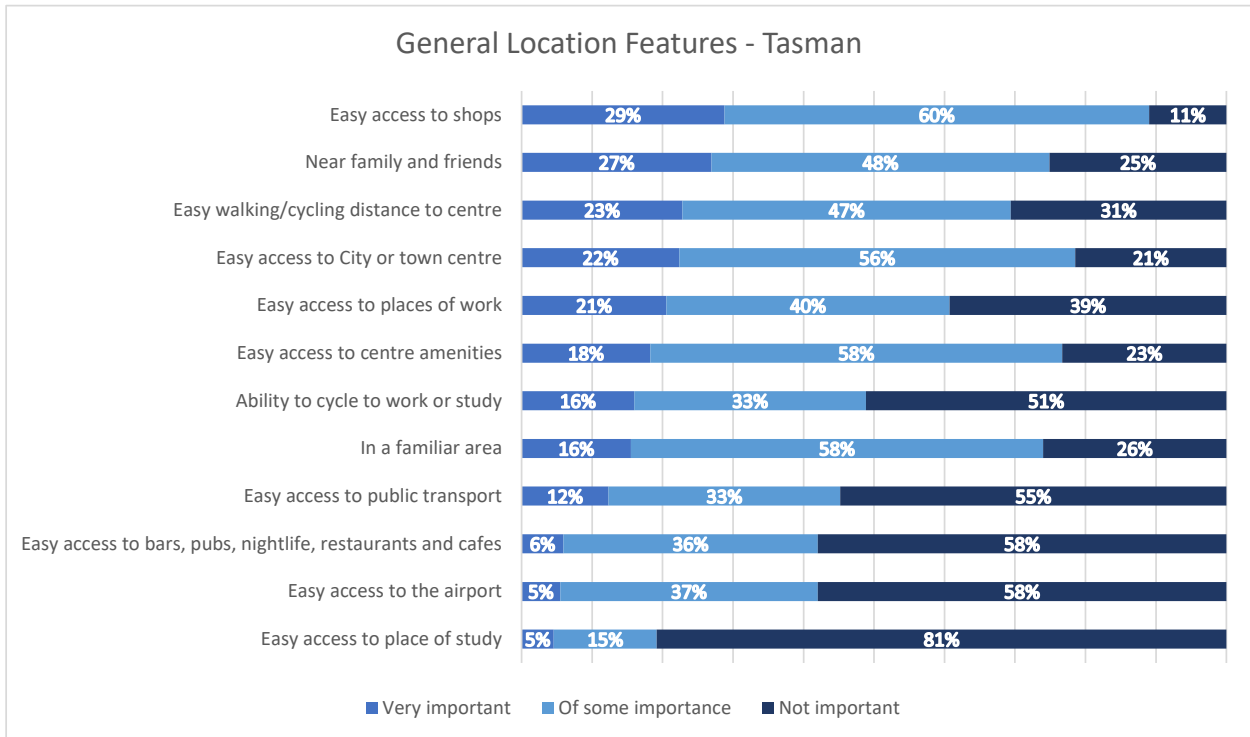
For Nelson, the item rated as very important the most among these features was also **easy access to shops**, however, this was more prominent than in Tasman with 36% rating this as being very important. This was followed by **easy walking/cycling distance to centre**, **easy access to city or town centre**, and **easy access to places of work** (Figure 4.1). The lowest proportion rated as being very important was **easy access to place of study** and the **airport**. In general, when compared to Tasman, the features have higher proportions rating them as very important. This may suggest that respondents in Nelson place a greater value on proximity to features.

Figure 4.1: Preferences for Location Features of Housing – Nelson Urban



For Tasman respondents, the item rated as very important the most among these features was **easy access to shops**, where 29% rated this as being very important. This is followed by **near family and friends**, **easy walking/cycling distance to centre**, **easy access to city or town centre**, and **easy access to places of work**. The lowest proportion rated as being very important was easy access to **place of study** and the **airport** with 6% or less of the respondents.

Figure 4.2: Preferences for Location Features of Housing – Tasman Urban



4.2.2 Facilities Features

The ‘facilities’ category included 11 features related to aspects of the neighbouring environment. Generally, most of these features were not rated as being ‘very important’ (Figure 4.3 and Figure 4.4). The preferences were different between Nelson and Tasman respondents.

For Nelson the highest rated features were **near a park or reserve, community centre, sportsclub/fields** and **Near recreational activities**. While for Tasman highest rated features were being **near a GP/healthcare provider**, and the **coast/beach**. This may reflect the different distribution of facilities within these two areas, with respondents in Nelson being comparatively close to healthcare and the coast, relative to Tasman respondents.

It may also be because Tasman residents are older than Nelson residents, therefore proximity to a GP or health care provider is more important.

Figure 4.3: Preferences for Facilities Features of Housing – Nelson Urban

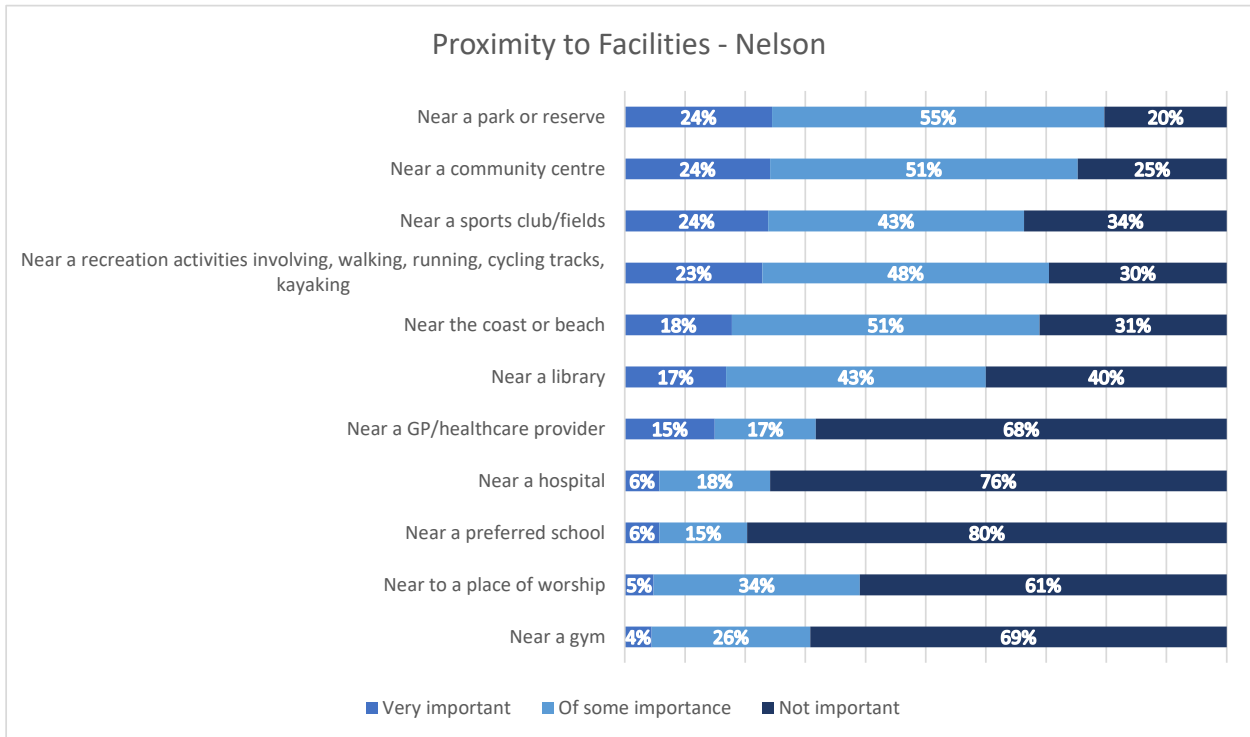
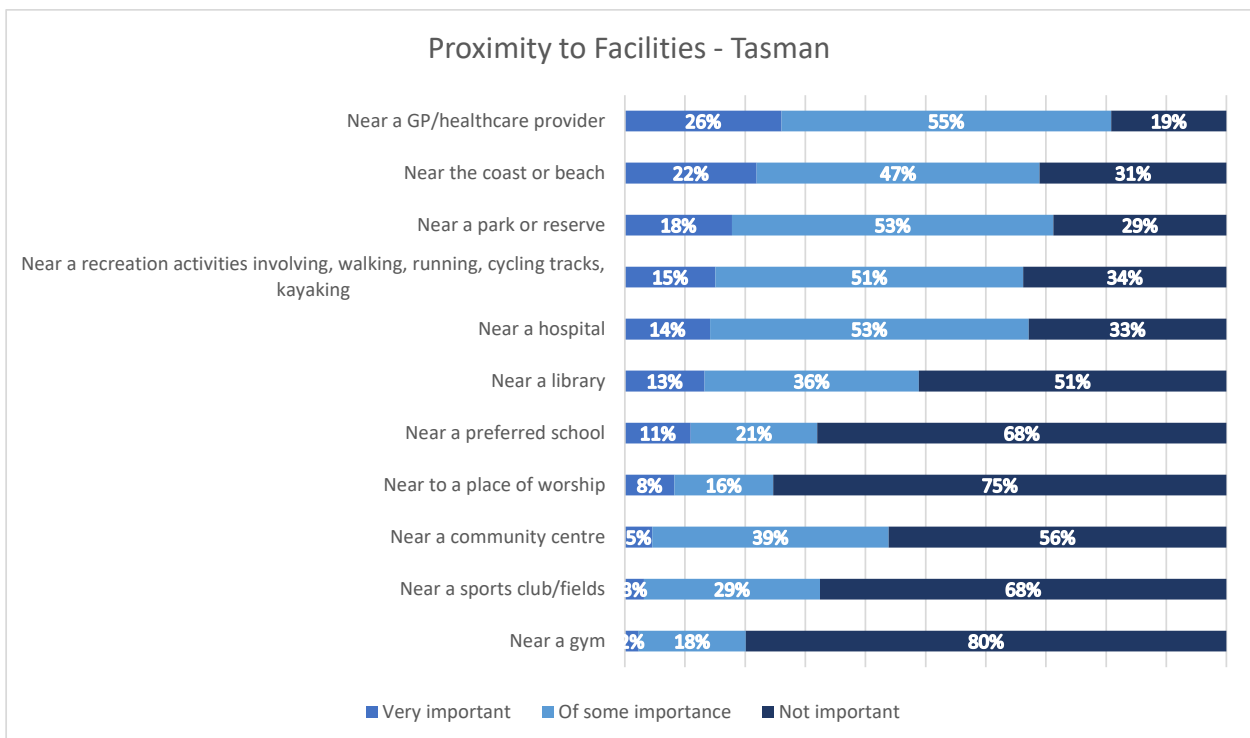


Figure 4.4: Preferences for Facilities Features of Housing – Tasman Urban



4.2.3 Local Environment Features

The ‘environment’ category included 13 features related to aspects of the neighbouring or local environment. Generally, most of these features were rated as being ‘very important’ or of ‘some importance’. Preferences were broadly consistent between Nelson and Tasman respondents (Figure 4.5 and Figure 4.6), and with other HWC studies.

The local environment category has some of the highest regarded features. A large majority of respondents (75%-78%) consider that **safe from crime** is very important and a further 21%-23% consider it to be of some importance. This was the highest rated feature overall across all categories. Given that Safety is a fundamental need, second only to the physiological needs identified in Maslow’s hierarchy of needs, it is unsurprising safety is highest on this list.

A large number of respondents also considered **Safe from natural hazards** is very important (over 60%) or of some importance (over 30%). Being **away from industrial areas** was also rated very important (over 60%). Other important features include **lack of noise**, **presence of trees**, and **away from busy road**.

Figure 4.5: Preferences for Environmental Features of Housing – Nelson Urban

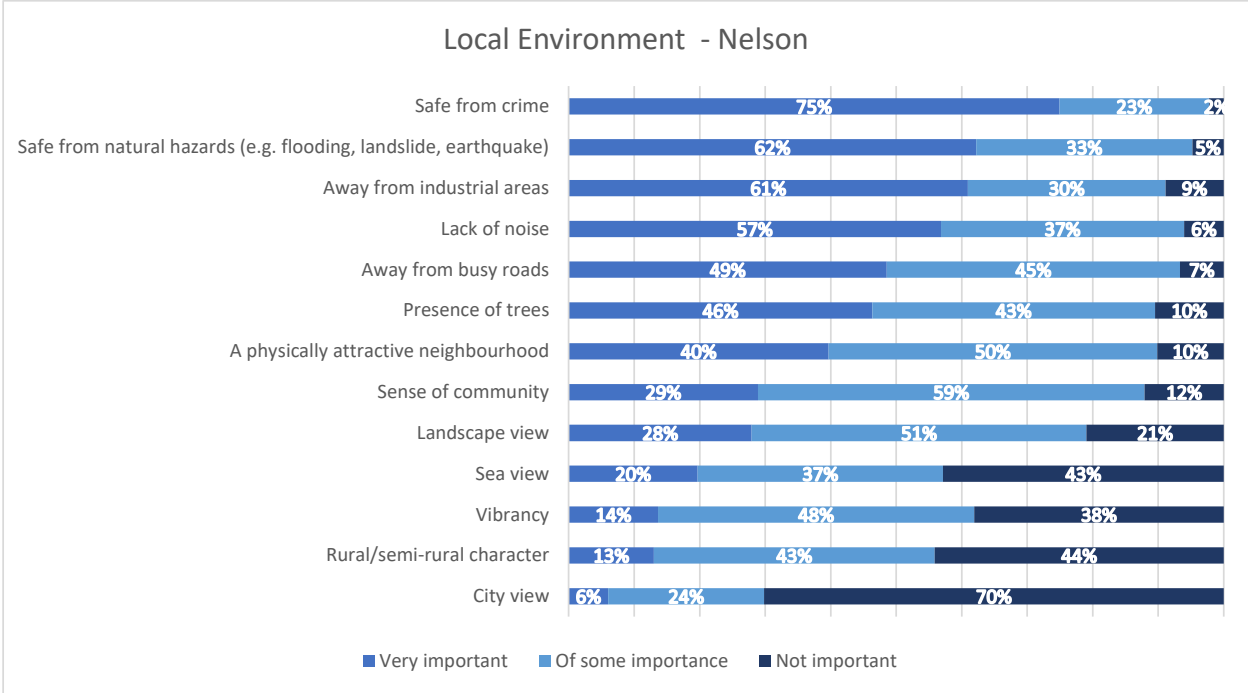
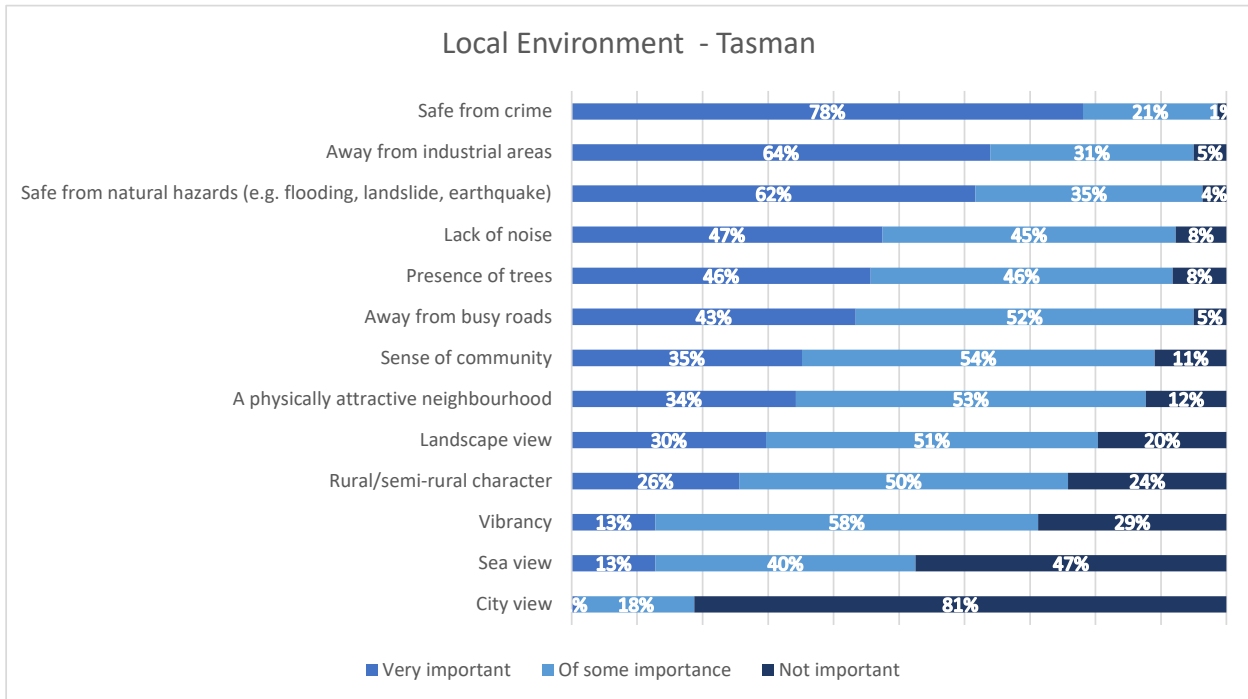


Figure 4.6: Preferences for Environmental Features of Housing – Tasman Urban



4.2.4 Property Features

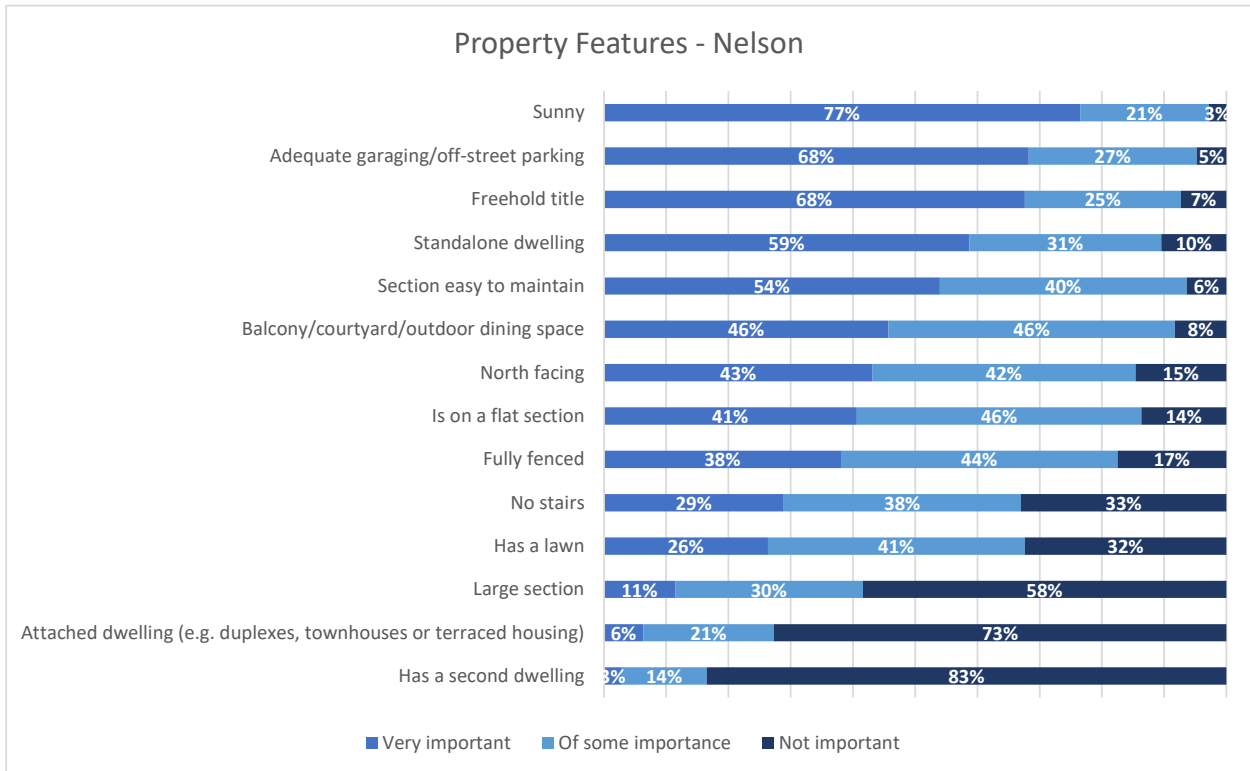
Many of the features related to properties were rated as being very important to many respondents when thinking about choosing a place to live, in particular over two thirds consider that **Sunny**, **Adequate off-street parking** and **Freehold title** were very important to over half the respondents (Figure 4.7 and Figure 4.8).

Sunny is aligned with warmth – one of the core physiological needs identified by Maslow. Given he postulated that people need to satisfy these fundamental needs before attending to needs higher up the scale – such as self-fulfilment and self-esteem, it is not surprising **Sunny** scored highly here.

For Nelson, **Sunny** was the highest rated property feature, with 77% considering it as ‘very important’. Other features rated as ‘very important’ by more than half of respondents were **Adequate parking** (68%), **Freehold title** (68%), **Standalone dwelling** (59%), and **Section easy to maintain** (54%).

A noticeable difference between Nelson and Tasman was the lower ratings for **Has a lawn** and **Large section** in Nelson.

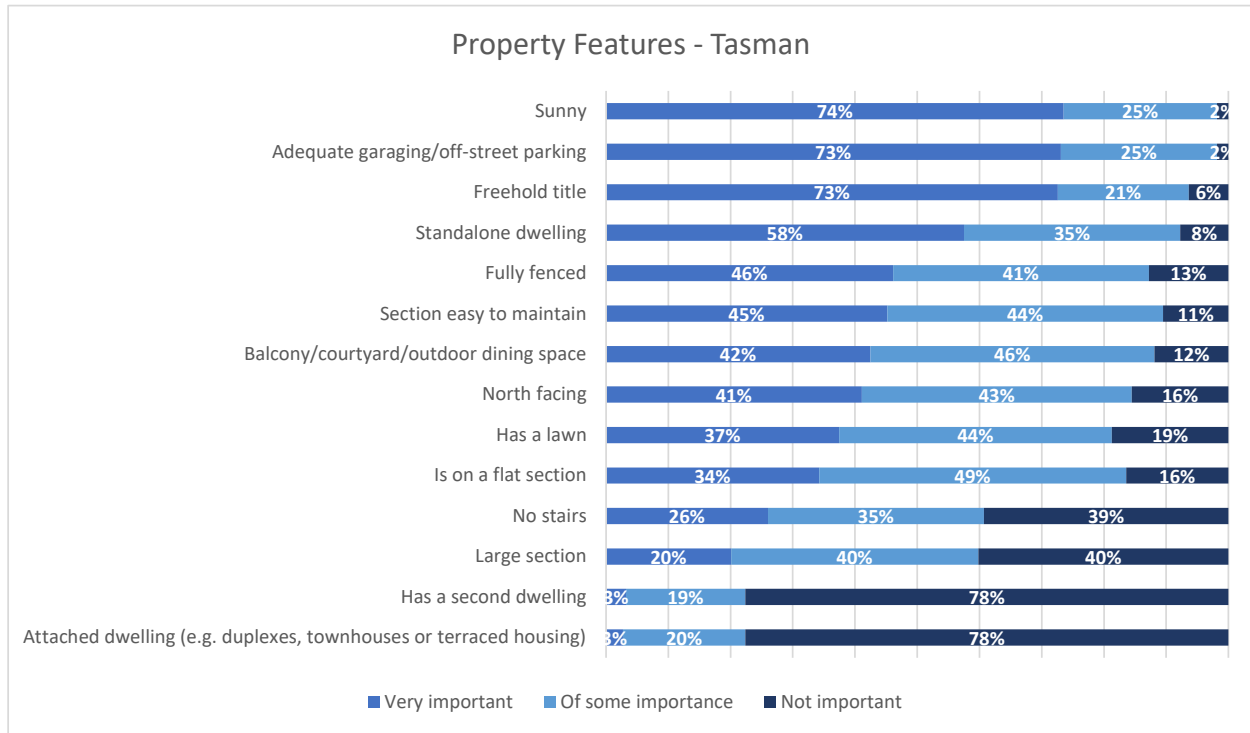
Figure 4.7: Preferences for Property Features of Housing – Nelson Urban



For Tasman, the top property features were **Sunny**, **Adequate parking**, and **Freehold Title**, all rated as ‘very important’ by 73% of respondents. **Standalone dwelling** (58%) was also very important to over half of the respondents. There are also a number of other property features that are very important to a third or more of the respondents (**Fully fenced**, **Section easy to maintain**, **Balcony/courtyard/outdoor dining space**, **North facing**, **Has a lawn**, and **is on a flat section**).

In total 10 of the features out of 14 were rated as ‘very important’ by a third or more and had less than 20% of respondents rate them as ‘not important’.

Figure 4.8: Preferences for Property Features of Housing – Tasman Urban



4.2.5 Overall Rankings of Features of Housing

The respondents were asked to then rank the features that they selected as ‘Very Important’ from 1 to 5. Figure 4.9 and Figure 4.10 below shows an index of the relative importance of these features, which is based on the most highly rated feature. The colours in the bar graph indicate which type of features they are, with green being an Environment feature, yellow being a Property feature, blue being a Location feature and purple being a Facility feature.

The figures shows that respondents ranked features that relate to environment and property most highly. By far the most important features were **Safe from crime, Sunny** and **Freehold title**. (index of 0.65). Other important features of housing include **Safe from natural hazards** and being a **standalone dwelling**. While there are some differences between Nelson and Tasman, the respondents in each area have broadly consistent preferences. Also we note that these results are consistent with the previous Housing We’d Choose studies.

Figure 4.9: Ranked Preferences of Housing – Nelson Urban

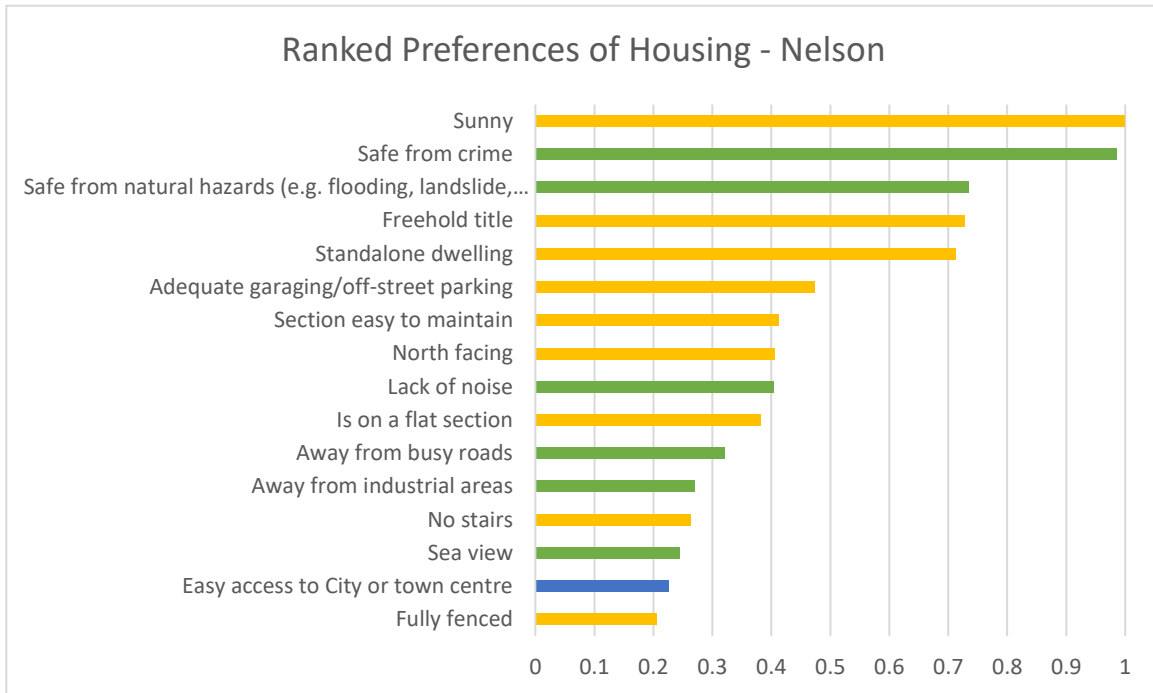
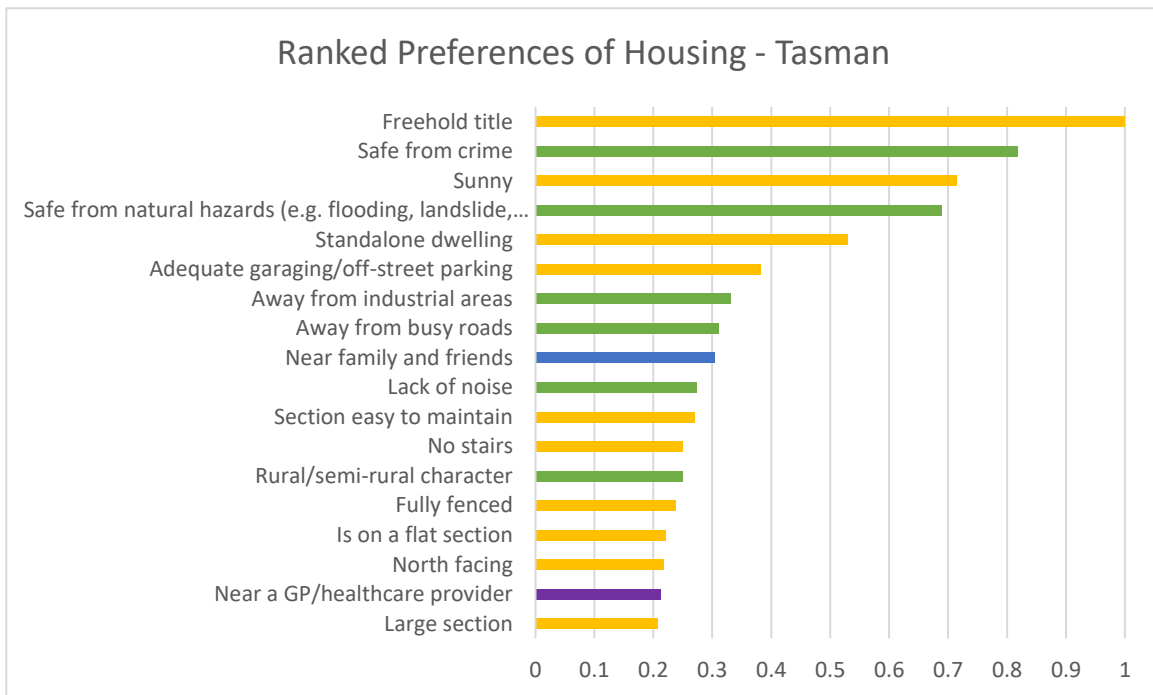


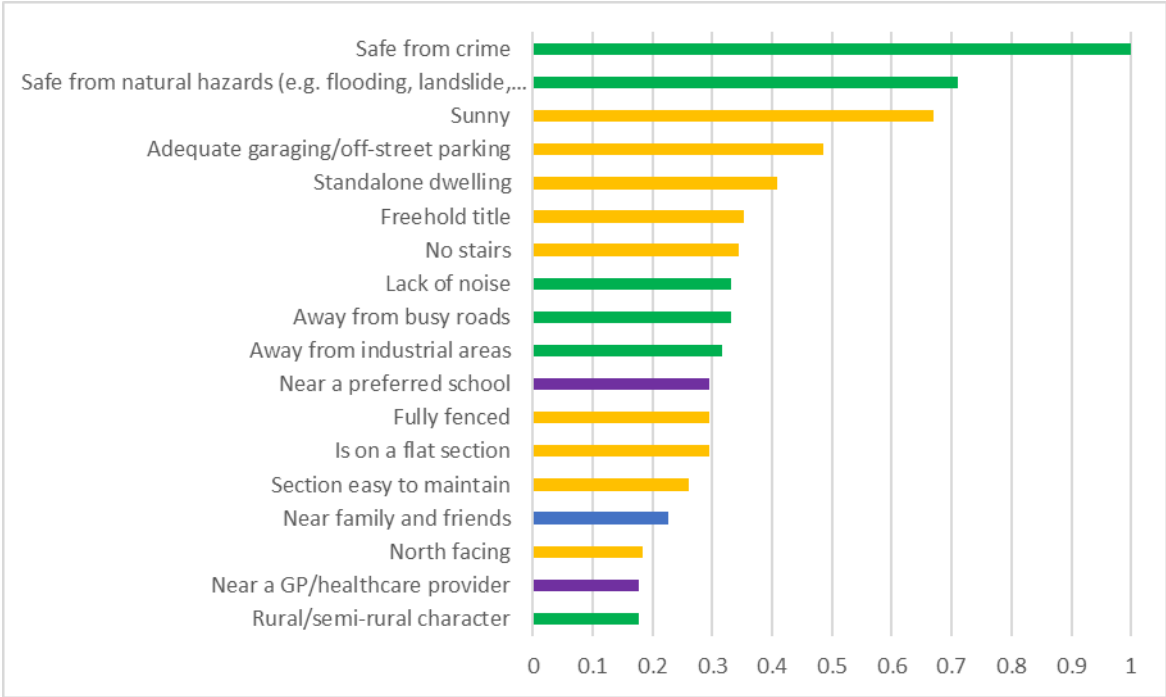
Figure 4.10: Ranked Preferences of Housing – Tasman Urban



4.2.6 What is important to Renters

While the above assessment covers all residents within the Nelson Tasman Urban Area, it is important to focus on the renter subsection of the market as well. There are some differences between Renters as a whole across the Urban are in terms of their ranking of housing features.

Figure 4.11: Nelson Tasman Renters Overall Preference Ranking



The top 2 features were safety from Crime and Natural hazards. While having Freehold Title is obviously not important (they are renting), having a Standalone dwelling still ranks highly (5th most important feature – the same as both the overall for Tasman Urban and Nelson Urban). In terms of proximity to facilities, 2 characteristics stood out; near a preferred school and near a GP/Healthcare provider. This probably reflects younger families in the rental market before purchasing a first home looking to be close to schools. This characteristic didn’t feature in the overall household assessment in 4.2.2, above.

Looking at what Renters chose, that is, those that went through the survey and answered questions about rental options, the most important factor in making a decision on housing, is location (the area they chose). The location chosen was ranked as most important by 46% of rental respondents – almost twice as high as the next category (House type) (Figure 4.12).

Least important in their choice is the Dwellings value (Figure 4.12).

Figure 4.12: Rental Respondents Levels of Importance for Decision Factors on Housing Choice

Feature Set	Most Important	>>>>>>>>	>>>>>>>>	Least Important
Dwelling features	27	34	41	18
Dwelling value	13	12	22	74
House type	30	49	32	13
Location	59	25	24	13
Total Responses	129	120	119	118

4.3 What Did Households Choose?

Before respondents undertook the choice experiment, they were asked to indicate which location they would prefer to live in (i.e. unconstrained choice). Their responses were used to refine a list of potential options presented to them in the choice exercise, both in terms of type of dwelling that can be afford and the potential to buy or rent.

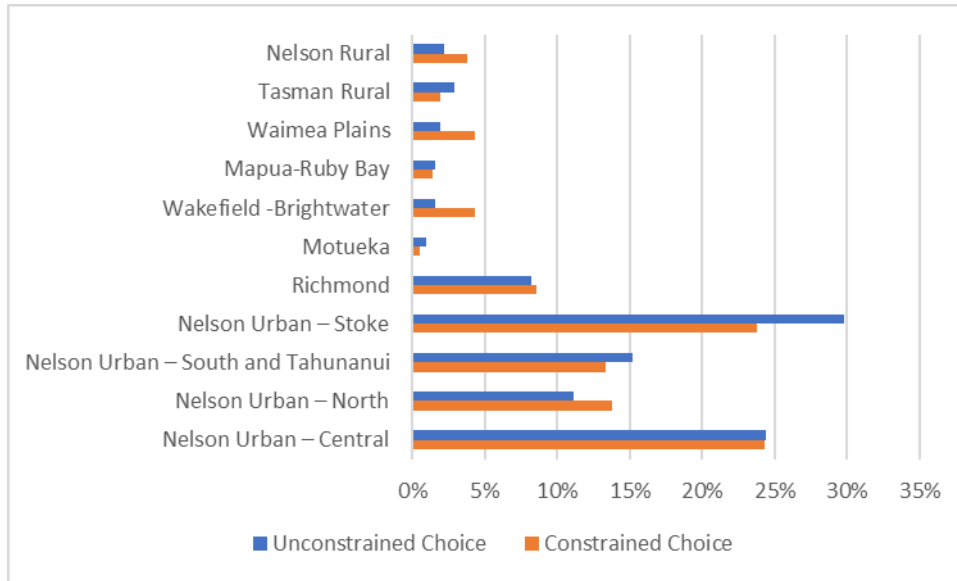
In total 66% of respondents could afford to buy a dwelling within Nelson and Tasman regions, these respondents were shown dwellings from the buy set that they could afford. Approximately 34% of respondents could not afford to buy a dwelling. A share (5% of the total) of these respondents could afford a private rental, they were shown dwellings from the rental set that they could afford. The remaining 28% of respondents could not afford to buy or rent any dwelling in the list. While this outcome is a high percentage, it is not unexpected as the choice sets do not include dwellings supplied by community housing providers and was targeted at medium value new build dwellings at the request of the client. Community housing providers supply dwellings for approximately 3-5% of the households who cannot afford to buy or rent on the private market. Logic dictates that Community housing providers are catering for a portion of the 28% (but that is not confirmed in the survey) – leaving some 23-25% without new build housing options.

The respondents were then shown a range of dwellings that they could afford which were located across the Nelson and Tasman regions. The respondent then selected the dwelling from within this selection set that best fit their preference (i.e. making a financially constrained choice).

4.3.1 Dwelling Location Choice

Figure 4.13 and Figure 4.14 below compares the locational choices respondents made in both an unconstrained and constrained manner. For the Nelson urban respondents, the largest mismatch is observed in Stoke where 30% respondents would live in this location if they could, but given financial constraints only 24% are able to afford to live in this location. Conversely the constrained demand in Wakefield-Brightwater and Waimea plains is higher than the unconstrained demand. This indicates that respondents who may not have chosen to live there given a choice unconstrained by finances, are choosing Wakefield-Brightwater once their finances are limited by their ability to pay.

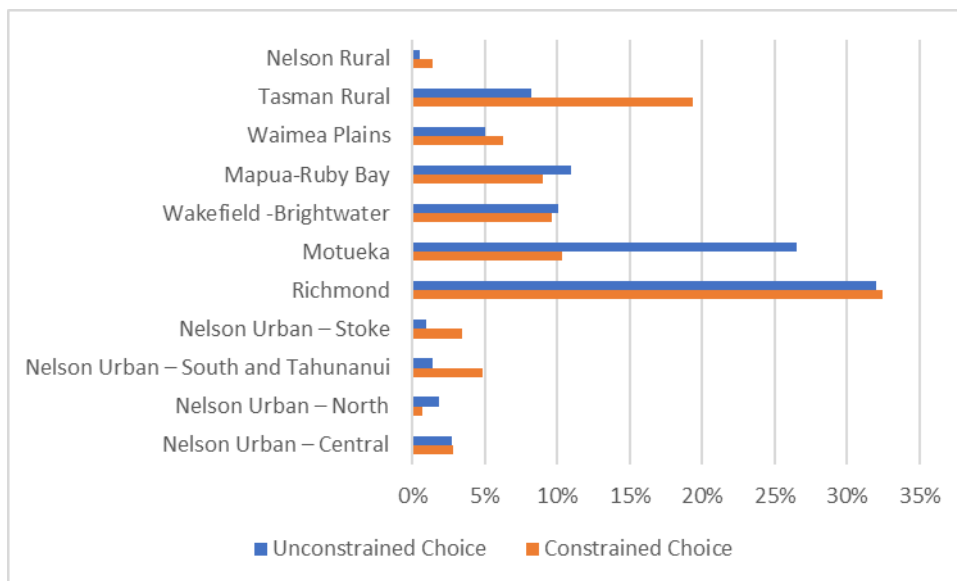
Figure 4.13: Dwelling Location - Unconstrained vs Choice Experiment – Nelson Urban



For the Tasman urban respondents, the largest mismatch is observed in Motueka where 26% respondents would live in this location if they could but given financial constraints this drops to 11%.

Conversely the constrained demand in Tasman Rural, Waimea plains and urban areas of Nelson is higher than the unconstrained demand. These are therefore locations that people choose less often when unrestrained by their financial situation. The findings indicate that some of the urban demand may be driven these more rural areas of Tasman or even back into residential parts of Nelson. given they are constrained in terms of their first choices by affordability issues.

Figure 4.14: Dwelling Location - Unconstrained vs Choice Experiment – Tasman Urban

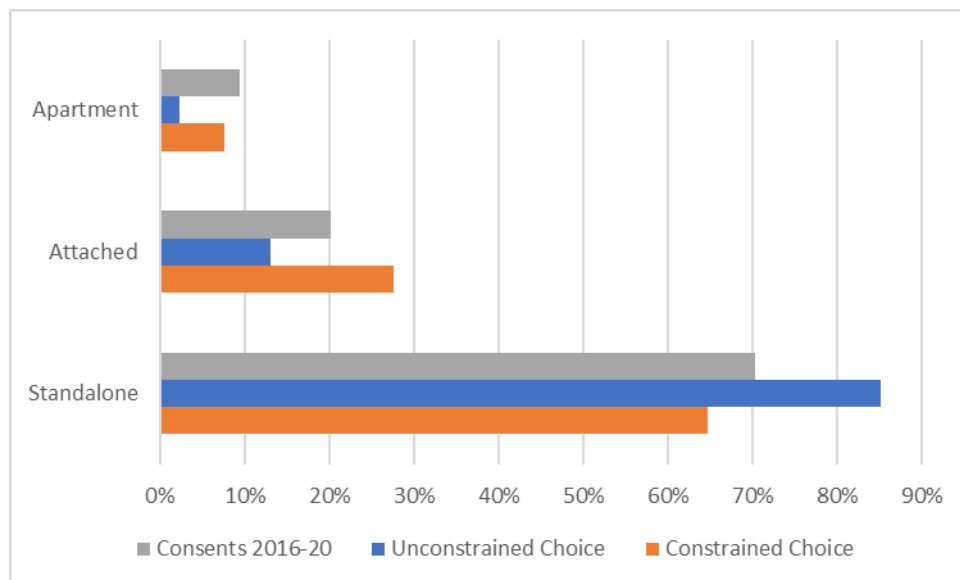


4.3.2 Dwelling Type Choice

Before the respondents undertook the choice experiment, they were asked to indicate which type of dwelling they currently live in. Respondents were shown a range of dwellings types that they could afford. The respondent then selected the dwelling that best fit their preference (i.e. make a financially constrained choice) from within their affordable range. Figure 4.15 and Figure 4.16 below shows that some of the respondents that live in stand-alone dwellings would be willing to live within higher density dwelling types, mostly attached dwellings and some apartments.

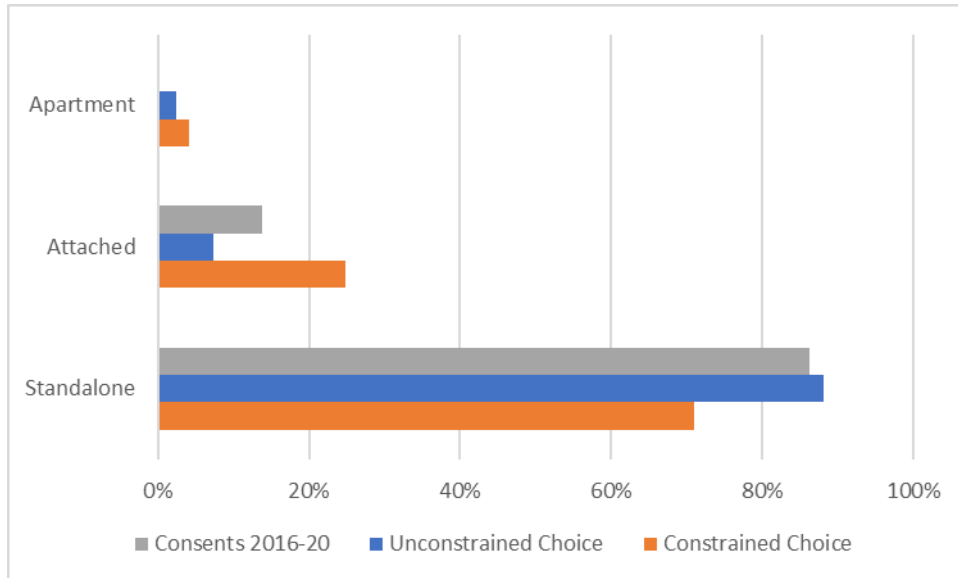
For example, 15% of the Nelson urban respondents currently live within an apartment or attached dwelling. This compares to the constrained choices within the survey which suggests that 35% would select an apartment or attached dwelling. This also can be compared to recent building consents which had 30% of new dwellings are apartment or attached dwellings.

Figure 4.15: Dwelling Type - Current vs Choice Experiment – Nelson Urban



This difference is also observed in Tasman, where 10% of urban respondents currently live within an apartment or attached dwelling. This compares to the constrained choices within the survey which suggests that 29% would select an apartment or attached dwelling. The recent building consents had 14% of new dwellings being apartments or attached dwellings.

Figure 4.16: Dwelling Type - Current vs Choice Experiment – Tasman Urban



4.3.3 Choice Option Match

Finally, the respondents were asked if their most preferred constrained option reflected the choice they would make. For respondents who could afford to buy a house, just over half (66%) answered ‘Yes’, 20% answered ‘No’ and the balance were unsure. For respondents in the rent section approximately three quarters (79%) answered ‘Yes’, 25% answered ‘No’ and a small share were unsure.


We suggest there are a few explanations which account for the differences in responses between the buy and rent respondents. All housing options presented in this survey were newbuilds, given that is what Council policy going forward will influence. For households looking to rent, a new build is likely to be more desirable compared to an older house (i.e. better insulation, warmer, dryer, more energy efficient). However, newbuilds can sometimes lack character that older houses possess which was a negating factor for a number of respondents within the buy section.

Although the answers to this particular question provide some level of accuracy/validation to the survey and overall research, the survey has been specifically designed to incorporate households purchasing ability and reflect the housing market at present. For cases where respondents answered no or did not know, we suspect they would end up selecting something close to the survey results – i.e. their constrained housing choice.

The respondents were also asked to rank four factors in terms of their choice, being location, house type, dwelling features and dwelling value. Almost half of the respondents ranked location as the most important factor, while house type was most important for approximately a quarter of respondents. Dwelling features (20%) and Dwelling value (5%) were less important.

4.4 Findings of Demand Preference Survey

The following are the key findings of the demand preference survey:

- 
- Respondents consider that the most important feature of a dwelling are **Safe from crime**, followed by **Freehold Title** and **Sunny**. Other important features of housing includes **Safe from natural hazards** and **Standalone**.
 - In terms of location choice, there is difference between unconstrained and constrained choice. The difference between the choices shows that financial constraints meant that respondents did not pick popular urban fringe areas (Stoke and Motueka), the survey indicates that respondents traded-off location for price, rather than potentially choosing different typology in the same location for lesser cost.
 - The choice date showed that some respondents that live in stand-alone dwellings would be willing to live within higher density dwelling types, mostly attached dwellings and some apartments.

5 Conclusion

The purpose of this report was to investigate housing preferences in the Nelson and Tasman regions, in order to identify what housing typologies will be needed in the future. To do this, a survey of residents in the regions indicated their housing preferences, which when taken with income constraints, provides some clear conclusions about the types of housing most needed by the community currently and into the future.

It is clear from this study that residents in the Nelson and Tasman regions are generally willing to trade off, both the type of dwelling and its location, with dwelling price being a critical consideration - and is the main driver for residents changing dwelling preferences.

Overall, the demand for stand-alone dwellings remains significant. However, demand for attached dwelling, such as apartments, terraces and duplexes, grows significantly. There is a growing appetite for attached dwellings and these types of dwellings become more and more accepted over time.

The following are the key findings of the demand preference survey:

- Respondents consider that the most important feature of a dwelling are **Safe from crime**, followed by **Freehold Title** and **Sunny**. Other important features of housing includes **Safe from natural hazards** and **Standalone**.
- In terms of location choice, there is difference between unconstrained and constrained choice. The difference between the choices shows that financial constraints meant that respondents were constrained from selecting popular urban fringe areas (Stoke and Motueka), it would seem that respondents traded-off these locations for other parts of the regions that are cheaper, e.g. rural locations located further from Nelson City and Richmond.
- The choice date showed that some respondents that live in stand-alone dwellings would be willing to live within higher density dwelling types, mostly attached dwellings and some apartments.



Appendix A – Survey Technical Report

Appendix B – Survey sample

The survey sample was derived from Research First’s database of land line and mobile phone numbers, which contains several hundred thousand household records.

Distribution of the final survey sample by household type, household income, respondent ethnicity and age are discussed below. The characteristics of the final survey sample are compared to the results from the 2018 Census for households living in the Nelson City and Tasman District regions.

All results were stated based upon the survey sample results. The survey results can be weighted to correct for over- and under-representation.

Household type

Market Economics used 2018 Census data to design a representative sample of household types within each sector (Table A.0.1), and Research First applied all efforts to ensure that the final sample reflected this spread (see Table A.0.2 for final sample)¹⁷. This was achieved by the inclusion of questions in the initial telephone contact to ascertain the individual’s household composition and the part of Nelson or Tasman region they lived in.

Table A.0.1: Distribution of household type by catchment area, 2018 Census (%)

	One-person households	Couples without children	Couple/ single with children	Other multi-person household	TOTAL
Nelson Urban	8%	9%	11%	1%	29%
Stoke	5%	6%	7%	0%	19%
Nelson Rural	0%	1%	1%	0%	2%
Total Nelson City	14%	16%	19%	1%	50%
Richmond	3%	5%	6%	0%	14%
Motueka	2%	3%	3%	0%	8%
Wakefield -Brightwater	1%	2%	2%	0%	4%
Mapua	0%	1%	1%	0%	3%
Tasman Rural	5%	8%	8%	1%	21%
Total Tasman District	11%	19%	19%	1%	50%
TOTAL	25%	35%	38%	2%	100%

¹⁷ Through the survey selection process, the focus was on drawing in respondents from urban areas and minimising the presence of respondents from rural areas. As such, rural areas will be underrepresented in the same by design. Also of note, due to error, Waimea Plains respondents may have been included in Tasman Rural. Therefore, in the presentation of distribution by area, Waimea Plains and Tasman Rural has been combined.

The final sample is broadly similar to the segments required to produce a representative sample. The main differences between the final survey sample and the distribution of household types across the Nelson and Tasman regions population are as follows:

- Nelson is slightly over-represented, where Tasman is under-represented (50% for each in the population, whereas 53:47 split favouring Nelson in the sample).
- Under-representation of couple/single person with children households (36% in the population and 29% in the survey sample).
- Over-representation of couple without children households (34% in the population compared to 40% in the survey sample).
- Under-representation of smaller one person households in Tasman, with 8% of households in the sample being one-person (compared with 11% in the population).
- Over-representation of other multi-person household in Nelson (2% in population and 6% in the survey sample)¹⁸.

Table A.0.2: Distribution of household type by sector, survey sample (%)

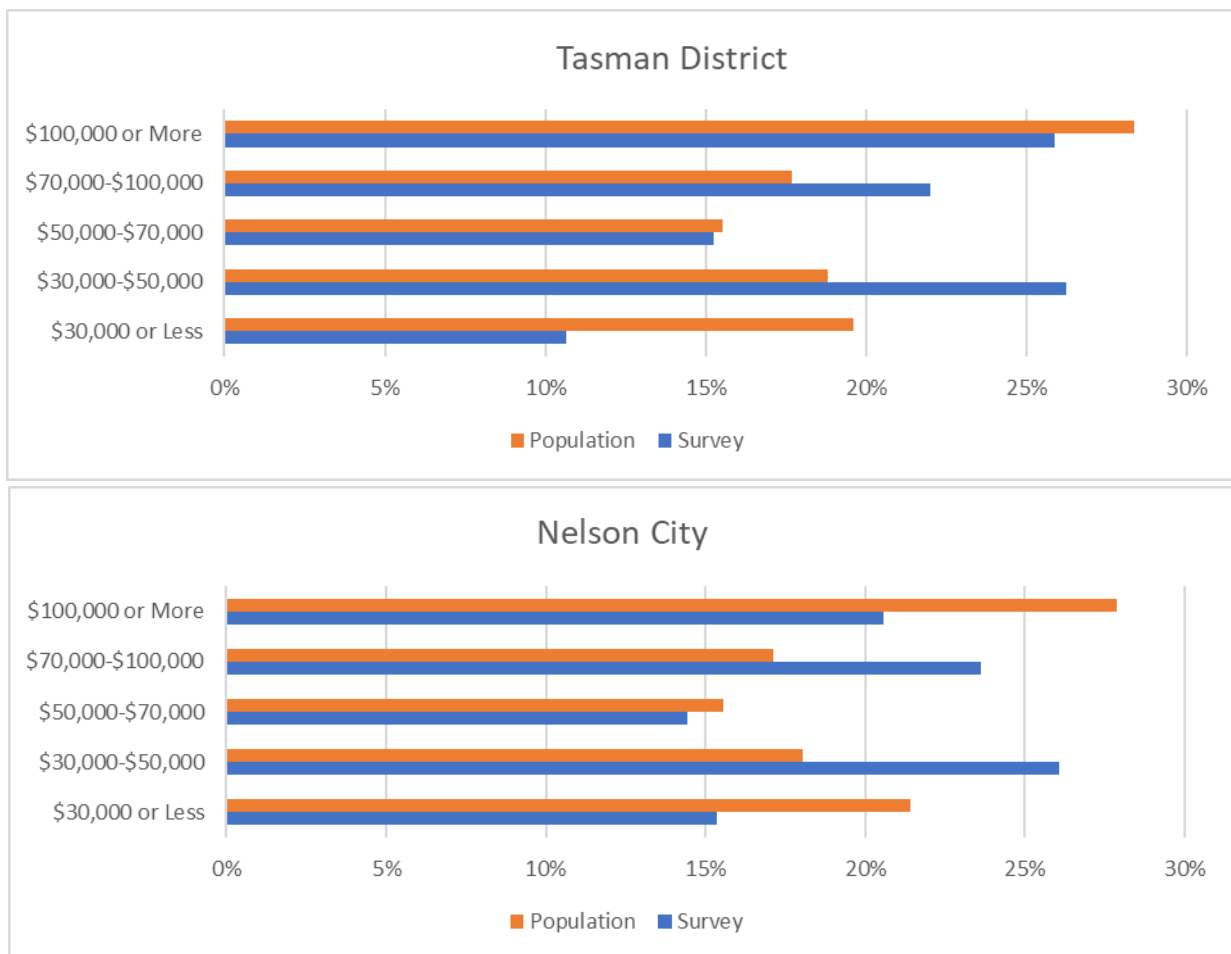
	One-person households	Couples without children	Couple/ single with children	Other multi-person household	TOTAL
Nelson	10%	11%	9%	3%	33%
Stoke	3%	7%	5%	3%	18%
Nelson Rural	0%	1%	1%	0%	3%
Total Nelson City	13%	19%	15%	6%	53%
Richmond	2%	6%	5%	1%	15%
Motueka	3%	5%	3%	1%	11%
Wakefield -Brightwater	1%	2%	3%	0%	6%
Mapua	0%	2%	0%	0%	4%
Tasman Rural	2%	5%	3%	1%	11%
Total Tasman District	8%	21%	14%	3%	47%
Total	22%	40%	29%	9%	100%

¹⁸ In the sample this type includes respondents whose household was classified as other or other multi-person. In the population data, this includes multi-family, non-family households, and unidentifiable household composition. The difference between the sample and the population is likely from respondents choosing other and when their situation is specified, the response fits one of the set categories.

Household income

The household income distribution of respondents in the final survey sample when to the overall population is fairly similar for Nelson and Tasman (see Table A.0.3). The distribution in the sample (blue bars) for the highest and lowest income groups (less than \$30,000 and more than \$100,000) is lower than the population (blue bars) showing under-representation in Nelson and Tasman. This is offset in both regions by over-representation in the income groups of \$30,000 to \$50,000 and \$70,000-\$100,000.

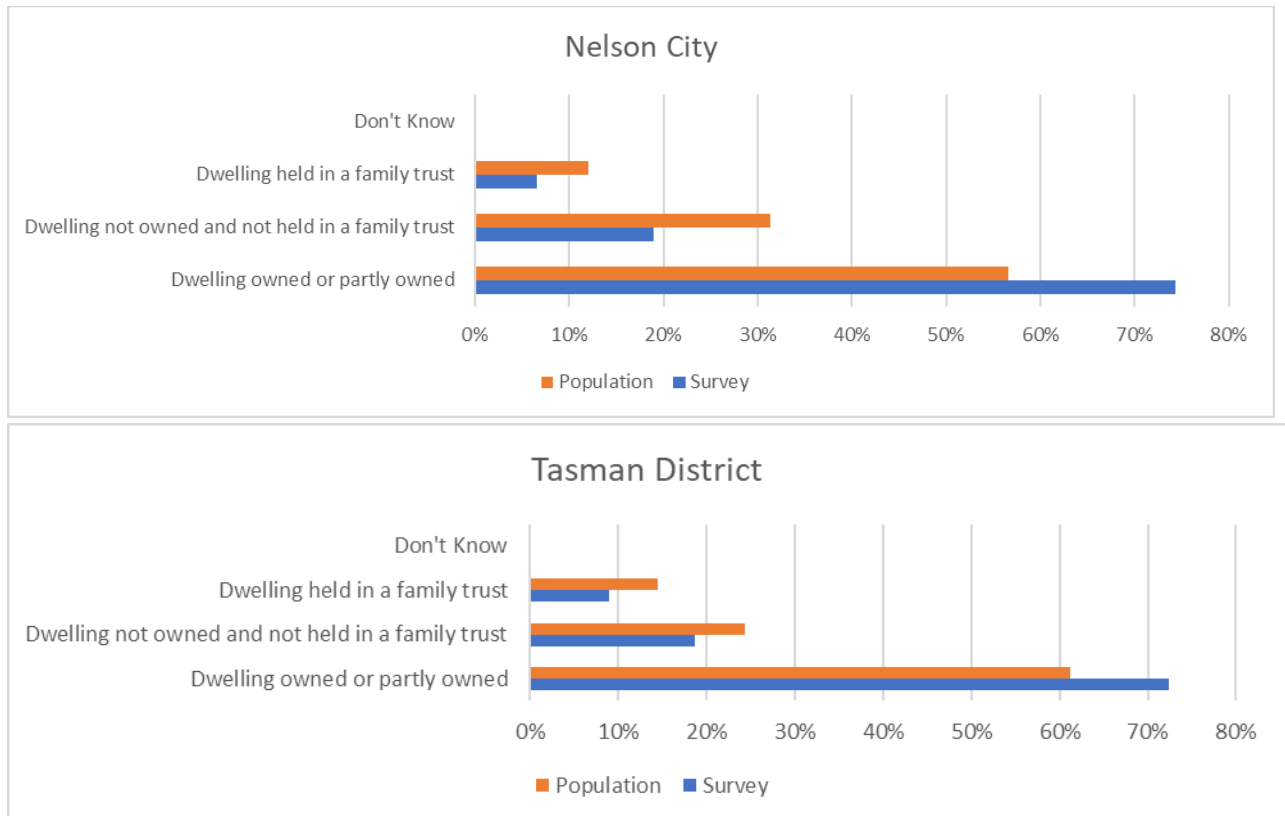
Table A.0.3: Household income distribution, survey sample vs population



Tenure

In both Nelson and Tasman, the survey sample also included a significantly larger proportion of respondents who own their house (own their own or jointly) either outright or with a mortgage than in the general population. This means that the sample has captured fewer households in rental properties than exists in the rest of the population.

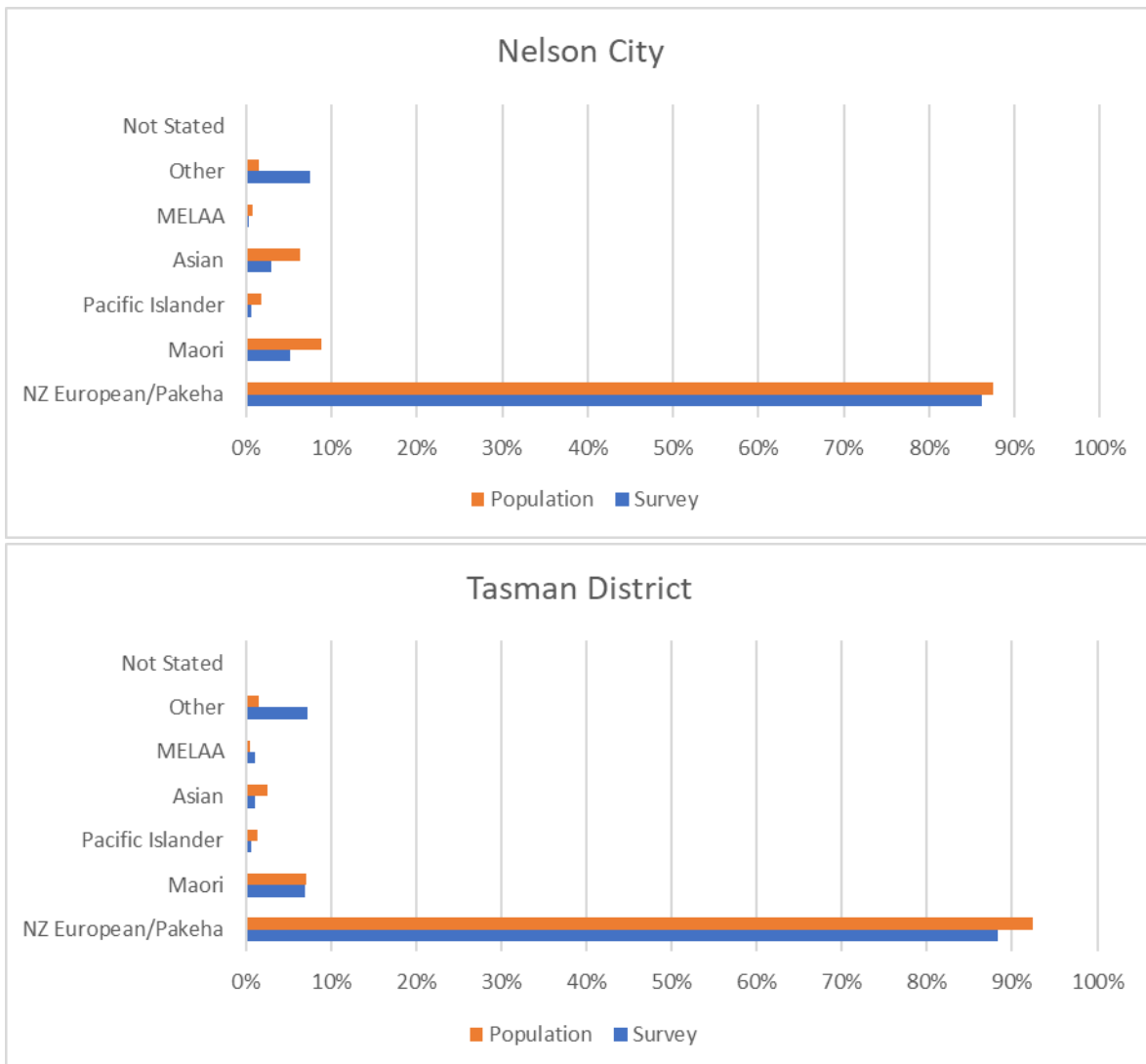
Table A.0.4: Dwelling tenure, survey sample compared to population



Ethnicity

Overall, the ethnicity distribution of the final survey samples for Nelson and Tasman are close to the overall. For both regions, the proportion of respondents in the survey sample who selected other ethnicity is over-represented. This means that the survey sample under-represents all ethnicity groups to some degree, notably including smaller proportions of Maori, Pacific Peoples and Asian than is present in the Nelson and Tasman populations. Upon a casual inspection of the specified response for the respondents which chose other, it appears that the majority of these are people of European ethnicity from foreign countries.

Table A.0.5: Ethnic distribution, survey sample compared with population



Age

The age distribution of the final survey samples for Nelson and Tasman, compared to the general population is shown in Table A.0.6. For Nelson, there was an over-representation of people in older age groups (>40 years) in the final survey sample compared to the general population, and a corresponding under-representation of people in younger age groups (<40 years), with a significantly lower proportion in the 15-29 years age group. The distribution of the Tasman sample was similar. It also had a significant under-representation of the 15-29 years age group, with an over-representation of respondents between 50 and 74 years.

Table A.0.6: Age distribution, survey sample compared with population

