Developing the Central City as a place to live
Who will live there and what they want

Christchurch Central City Living Research — Full Report
Conducted by IPSOS and Christchurch City Council, 2013

futurechristchurch.co.nz
Having people living in the Central City is important for vitality and recovery

The post-earthquake environment poses significant challenges for developers and potential residents.

To help developers and other stakeholders understand the type of developments that will appeal to potential residents in the city centre post-earthquake, the Council commissioned a survey. It set out to establish who wants to live in the Central City, housing preferences and what would enhance the area as a potential home.

What did they say

48% of those surveyed said they would consider a move into the Central City at some stage.

- 5% are already living in Central City.
- 14% would consider moving straight away or during rebuild.
- 29% would consider moving once Central City is rebuilt.

52% are Confirmed Suburbanites, will not live in Central City.

What they all want

Respondents showed a clear preference towards lasting neighbourhoods that build a sense of community now and in the future. They are pet-friendly, safe and secure, and close to amenities.

- **Security** – to live in a relaxing environment where you have privacy and it is safe to walk home at night.
- **Sense of belonging** – they are surrounded by family and are part of a community where there is interaction with others and pets are welcome.
- **Housing choices** – a range of options is required, from higher-end houses to more affordable housing. There is a strong preference for stand-alone houses (to rent or buy). A detached laneway was the next most preferred option.
- **Quality** – people want good quality housing with well designed body corporates to ensure properties are well maintained for the long-term (where properties do not become run down over time).

What people don’t want

- Poorly managed developments.
- To sacrifice security and safety for the vitality and fun of Central City living.
People who would consider moving into the Central City

**Keen rebuilders**
- **preparing to move now**
  - Younger people with no children – students or young professionals
  - Equally weighted towards owning or renting although typically renters; 2 bedroom home.
  - Most prefer stand-alone house, would consider flat/apartment/attached house, with preference for detached laneway.
  - Leisure time is spent socialising at bars, restaurants, shopping, visiting cafes and going to the gym.

**Mid-stage movers**
- **would consider moving during the rebuild**
  - More established households, with older children or children left home
  - Slightly more would prefer owning (55%) to renting (45%).
  - Most prefer stand-alone house of 3 bedrooms, would consider flat/apartment/attached house with preference for detached laneway.
  - Want similar lifestyle to suburbs with parks and car parking at the house. In their leisure time, they participate in cultural activities, socialise in bars, go to restaurants, shop, visit cafes and parks and go to the gym.

**Established movers**
- **will move in the next 5–10 years**
  - More established, wealthier households, typically with children or children left home.
  - Higher existing home ownership rates, only 24 percent looking to buy in next four years.
  - Stand-alone house of 3 bedrooms preferred, especially with green design features; would consider detached laneway.
  - Lifestyle: Want similar to what suburbs offer, they are sporty, healthy and active. Leisure time is spent playing sports, visiting bars, cafes, restaurants and going shopping.
Timing of development

In the short to medium term, the people most likely to consider moving are younger, without children. They have lower rates of home ownership and enjoy shopping, visiting bars and cafes, parks and participate in outdoor sports. Once the rebuild has progressed (5-10 years), more families are likely to move in to the Central City. They desire stand-alone, bigger homes. They are active, sporty people who also rate highly aspects of security, privacy and pet-friendliness.

Who was surveyed

In total, 2211 Christchurch residents aged 18 years or older completed the survey. A mixed method approach of online and postal surveys was used. The overall response rate was 22%, the sample has a margin of error of +/- 2%. Weighting was used to correct imbalances in sample representation for age, ward, gender and ethnicity. Fieldwork was conducted between 15 November 2012 and 7 January 2013. The questionnaire was developed by Ipsos in consultation with Christchurch City Council.
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Ipsos Ltd is currently working towards full compliance with the requirements of ISO 20252. This project has been carried out in compliance with this International Standard.
Background and Objectives
Background

- The post-earthquake environment poses significant challenges for developers and potential residents alike:
  - There is a very badly damaged and demolished central city that has lost most of its cultural and hospitality attributes.
  - Whilst the new city to be rebuilt will no doubt be an exciting place to live it will be some years before the benefits of that are delivered in aggregate form and the challenge meantime should not be underestimated.

- To help build confidence for developers and to help with the marketing of city living this research was commissioned to reflect recent changes and new opportunities proposed by the CCP.

- This research is to act as a “soft” incentive that the Council can offer residential developers, and will help to build a strong foundation for future marketing and the running of an international design competition for the Housing Showcase project.
Research objectives

- The objective of the research was:

  To understand the importance of the various design attributes for each potential market segment, and the size of the segments of people who would be potential Christchurch Central City dwellers.

- Some of the key questions the Council wished to better understand were:
  - A profile of each main market segment.
  - Within each segment, an understanding of the weighting of each of the following factors in the decision process:
    - Neighbourhood.
    - Site.
    - Buildings.
    - Residential Units.
Research Approach
Electoral roll
The Christchurch City Council requested the electoral roll for use in this project. A representative sample (upweighted for Maori and older age groups) of 5000 was randomly selected.

Initial invitation letter
An initial invitation letter sent with an invitation to participate online.

Reminder letter
A reminder letter sent to those who had not completed.

Final reminder letter with hardcopy
A final reminder letter was sent with a hard copy questionnaire (and return envelope) for completion.

Questionnaire
Questionnaire designed by Ipsos in consultation with Christchurch City Council.

Panel research
Invitations were sent out through an online panel provider to gather more response.

Data processing and reporting
A total of n=2,211 responses were collected using the process described above. This data was then analysed and findings presented in this report.
Research approach

Sampling

- The target population for the survey was Christchurch City (territory authority area) residents aged 18 and over.
- The initial sample for this project was drawn from the electoral roll, with a top up from the Research Now online panel due to lower than anticipated response rates (the main reasons for this being people’s dissatisfaction with post-earthquake redevelopment progress and general post-quake stress).
  - Some also cited a disinterest in Central City living as their reason for non-participation, hence the actual interest in inner city living may be slightly over-stated in this sample.
- The electoral roll records information such as age, whether people are registered on the Maori electoral roll, title (indicative gender measure) and address.
- A random sample of 5000 participants was selected from the electoral roll. This was broadly representative of the Christchurch city population according to the electoral roll. There was an up-weighting of Maori, male and older participants as these groups were anticipated to have a lower response rate.
- To supplement the responses from the electoral sample, we also used an online panel to collect 605 responses from a mailout to 5000 Christchurch respondents aged between 18 and 55.

Questionnaire

- A questionnaire was designed by Ipsos in consultation with Christchurch City Council.
- An online link for the questionnaire was included in the invitation letter. This letter was signed by Jonathan Dodd of Ipsos, but included the Christchurch City Council logo for authenticity purposes.
- This letter also provided contact details for Jonathan Dodd so that individuals had someone to contact if they had any queries while filling out the questionnaire.
Research approach

Achieved sample

A total sample of 2,211 responses were received, this sample has a maximum margin of error of ±2.1% at a 95% confidence level for a 50% response. This table outlines how these were broken down by sample type:

<table>
<thead>
<tr>
<th>Sample</th>
<th>Total invitations</th>
<th>Total response including terminates/incomplete/completes</th>
<th>Total response rate</th>
<th>Completed responses</th>
<th>Completed response rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electoral roll sample</td>
<td>5000</td>
<td>1798</td>
<td>36.0%</td>
<td>1606</td>
<td>32.1%</td>
</tr>
<tr>
<td>Online panel sample</td>
<td>5000</td>
<td>715</td>
<td>14.3%</td>
<td>605</td>
<td>12.1%</td>
</tr>
</tbody>
</table>

The fieldwork was conducted between 15 November 2012 and 7 January 2013 (last day for collection of the postal questionnaires).

The electoral roll sample received three invitations to participate in the survey; the first two were letters that included the online link and the final reminder included a hard copy of the questionnaire for completion. This could be sent back in a postage paid envelope.

The Research Now participants were sent an online invitation.
Research approach

- **Weighting**
  - Weighting was used to correct for imbalances in sample representation arising from the use of the Electoral Roll as a sample frame and not using quotas on the responses as they came through.
  - The weights were calibrated to match the population percentage figures for the age, ward, gender and Maori vs. non Maori.
  - The most up to date population projection figures were used from Statistics New Zealand (June 2012 for age and gender, and June 2011 for ward). The Maori figure comes from the 2006 census data, as this was a multiple response question so everyone who identified themselves as Maori was included in this group for weighting and everyone else was put in the other category.

- **Reporting**
  - The differences reported between segments in this report are significant at the 95% level of confidence. Where significant differences are shown for each segment, this is compared to the total of all other segments.
  - All base sizes shown on charts and tables (n=) are unweighted base sizes.
  - Please note that any base size under n=50 is considered small, and therefore results should be interpreted with caution.
  - Note this is a quantitative survey, further insights can be gained using qualitative research. Interested respondent details were retained to provide this opportunity for qualitative focus groups to be conducted.
Sample Profile
These tables show the sample profile for the total sample collected.

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profiling groups</td>
<td>2,211</td>
</tr>
<tr>
<td>Inner city movers</td>
<td>2%</td>
</tr>
<tr>
<td>Keen Rebuilders</td>
<td>6%</td>
</tr>
<tr>
<td>Mid-Stage Movers</td>
<td>8%</td>
</tr>
<tr>
<td>Established Movers</td>
<td>29%</td>
</tr>
<tr>
<td>Inner city stayers</td>
<td>4%</td>
</tr>
<tr>
<td>Confirmed Suburbanites</td>
<td>52%</td>
</tr>
<tr>
<td>no response</td>
<td>0%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>18 - 24 years</td>
<td>14%</td>
</tr>
<tr>
<td>25 - 34 years</td>
<td>17%</td>
</tr>
<tr>
<td>35 - 49 years</td>
<td>26%</td>
</tr>
<tr>
<td>50 - 64 years</td>
<td>24%</td>
</tr>
<tr>
<td>65+ years</td>
<td>19%</td>
</tr>
<tr>
<td>no response</td>
<td>0%</td>
</tr>
<tr>
<td>Gender</td>
<td>2,211</td>
</tr>
<tr>
<td>Male</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
</tr>
<tr>
<td>no response</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethnicity</td>
<td>2,211</td>
</tr>
<tr>
<td>New Zealand Maori</td>
<td>8%</td>
</tr>
<tr>
<td>New Zealand European or Pakeha</td>
<td>83%</td>
</tr>
<tr>
<td>Pacific Islander</td>
<td>2%</td>
</tr>
<tr>
<td>Asian</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>Other European</td>
<td>3%</td>
</tr>
<tr>
<td>no response</td>
<td>1%</td>
</tr>
<tr>
<td>Ward</td>
<td>2,211</td>
</tr>
<tr>
<td>Shirley-Papanui Ward</td>
<td>17%</td>
</tr>
<tr>
<td>Fendalton-Waimairi Ward</td>
<td>16%</td>
</tr>
<tr>
<td>Burwood-Pegasus Ward</td>
<td>16%</td>
</tr>
<tr>
<td>Riccarton-Wigram Ward</td>
<td>18%</td>
</tr>
<tr>
<td>Hagley-Ferrymead Ward</td>
<td>15%</td>
</tr>
<tr>
<td>Spreydon-Heathcote Ward</td>
<td>16%</td>
</tr>
<tr>
<td>Banks Peninsula Ward</td>
<td>2%</td>
</tr>
<tr>
<td>no response</td>
<td>0%</td>
</tr>
</tbody>
</table>
These tables show the sample profile for the total sample collected.

### Demographics

<table>
<thead>
<tr>
<th>Household composition</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Younger couple without children</td>
<td>7%</td>
</tr>
<tr>
<td>Household with youngest child under 5</td>
<td>14%</td>
</tr>
<tr>
<td>Household with youngest child 5-13</td>
<td>13%</td>
</tr>
<tr>
<td>Household with youngest child 14 or over</td>
<td>14%</td>
</tr>
<tr>
<td>Mature couple – no children or none living at home</td>
<td>27%</td>
</tr>
<tr>
<td>Single/one person household</td>
<td>13%</td>
</tr>
<tr>
<td>Flat – not a family home</td>
<td>7%</td>
</tr>
<tr>
<td>Family with adult child/ren</td>
<td>2%</td>
</tr>
<tr>
<td>Live with family/extended family</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>no response</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Occupation of main income earner

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>12%</td>
</tr>
<tr>
<td>Professional</td>
<td>25%</td>
</tr>
<tr>
<td>Technician and Trades Worker</td>
<td>11%</td>
</tr>
<tr>
<td>Community and Personal Services Worker</td>
<td>3%</td>
</tr>
<tr>
<td>Clerical and Administrative Worker</td>
<td>7%</td>
</tr>
<tr>
<td>Sales or Retail Worker</td>
<td>6%</td>
</tr>
<tr>
<td>Machinery Operator and Driver</td>
<td>4%</td>
</tr>
<tr>
<td>Labourer</td>
<td>5%</td>
</tr>
<tr>
<td>Student</td>
<td>4%</td>
</tr>
<tr>
<td>Home Executive (full time parent/caregiver)</td>
<td>2%</td>
</tr>
<tr>
<td>Beneficiary</td>
<td>4%</td>
</tr>
<tr>
<td>Retired</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>no response</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Total household income

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss</td>
<td>0%</td>
</tr>
<tr>
<td>No income</td>
<td>1%</td>
</tr>
<tr>
<td>Less than $10,000</td>
<td>1%</td>
</tr>
<tr>
<td>$10,001 - $20,000</td>
<td>6%</td>
</tr>
<tr>
<td>$20,001 - $30,000</td>
<td>7%</td>
</tr>
<tr>
<td>$30,001 - $40,000</td>
<td>6%</td>
</tr>
<tr>
<td>$40,001 - $50,000</td>
<td>8%</td>
</tr>
<tr>
<td>$50,001 - $60,000</td>
<td>8%</td>
</tr>
<tr>
<td>$60,001 - $70,000</td>
<td>7%</td>
</tr>
<tr>
<td>$70,001 - $80,000</td>
<td>6%</td>
</tr>
<tr>
<td>$80,001 - $90,000</td>
<td>6%</td>
</tr>
<tr>
<td>$90,001 - $100,000</td>
<td>6%</td>
</tr>
<tr>
<td>$100,001 - $150,000</td>
<td>14%</td>
</tr>
<tr>
<td>$150,001 - $200,000</td>
<td>5%</td>
</tr>
<tr>
<td>More than $200,000</td>
<td>4%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>15%</td>
</tr>
<tr>
<td>no response</td>
<td>1%</td>
</tr>
</tbody>
</table>
Summary of Findings
48% will consider moving into the central city

- Segmenting these people by their possible move-in date shows four groups of possible residents, each with distinct lifestage and lifestyle profiles.

- **Confirmed Suburbanites, 52%**
  Will not live in the central city

- **Inner City Dwellers, 5%**
  Already living in the central city

- **Keen Rebuilders, 6%**
  Keen to move in now (within next 2 years)

- **Mid-Stage Movers, 8%**
  Will move in the next 3-5 years

- **Established Movers, 29%**
  Will move in the next 5-10 years
The Segments do have many distinct preferences, budgets & lifestyles

Younger people without kids / older empty nesters already living the inner city lifestyle with smaller, rented residences and more socialising ‘out and about’.
A third looking to buy:
• 2.9 bedrooms on average.
• Stand alone house most preferred (87%), but still more likely than other segments to consider flats / apartments / attached houses.
• Detached laneway house preferred option (21%).
Some 55% looking to spend $200k - $400k

Keen Rebuilders, 6%
Keen to move in now (within next 2 years)

Mid-Stage Movers, 8%
Will move in the next 3-5 years

Established Movers, 29%
Will move in the next 5-10 years

More established households, typically with older children or children left home.
Lower home ownership rates but 55% looking to buy
• $384k, 3.1 bedrooms.
• Stand alone house most preferred (78%), but still quite likely to consider flats / apartments / attached houses as long as lifestyle is similar to their current suburbia, e.g. with parks, carparking at the house etc.
• Detached laneway house preferred option (21%).
Some 59% looking to spend $200k - $400k

More established, wealthier households, typically with children or children left home. Sporty, healthy and active.
Higher home ownership rates, less affected by quakes, only 24% looking to buy
• $413k, 3.2 bedrooms.
• Stand alone house most preferred, esp. with green design features.
• Detached laneway house preferred option (18%).
Some 52% looking to spend $200k - $400k

Younger people without kids / students & professionals happy to live the inner city lifestyle with smaller, rented residences and more socialising ‘out and about’.
Typically renters; more transient, already less likely to be in standalone houses.
Around half looking to buy:
• $371k, 2.8 bedrooms.
• Stand alone house most preferred (77%), but still quite likely to consider flats / apartments / attached houses.
• Detached laneway house preferred option (35%).
Some 58% looking to spend $200k - $400k
But regardless of lifestyle, most still want the basic human comforts of conviviality, security and sense of belonging.

My lifestyle is all about maximizing the pleasure and enjoyment I can get, enjoying myself without worrying about the consequences. I am spontaneous, follow my instincts and live for the moment.

My lifestyle is about being unique, special and ahead of the pack. I’m proud of my own special abilities, whether they are intellectual, cultural, or material.

My lifestyle is about being the best. I want to be respected, praised and acknowledged for the choices I make and for the successes I have achieved in my life.

My lifestyle is about security, about feeling relaxed. I prefer to feel soothed, comforted and taken away from the stresses and strains of hectic daily life.

My lifestyle is about friendliness. For me, meeting people is a joy. I love having good times with good friends and loved ones, being in harmony, interacting and sharing experiences regardless of any differences we might have.

My lifestyle is about keeping myself in check and controlling my emotions and feelings. I like to be completely in control, to keep things in order, have discipline and stick to a routine which feels quite comfortable and safe.

Q18. There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
It’s difficult to expect New Zealanders to give up their preferences for a ‘patch of grass’ and a feeling of being in a traditional detached house that they have control over

- All the segments strongly preferred stand-alone houses, whether renting or buying.
- People want the ability to have pets, privacy, and safety at night.
- Of the four housing concepts shown, the one closest to the traditional New Zealand house was clearly preferred (the Detached Laneway).
- People want to feel a sense of belonging – to feel a welcomed part of a safe, comfortable community of friends and friendly neighbours.
  - Fear of inner-city developments being poorly managed or becoming high-density ‘urban slums’ was apparent, especially when respondents referred to ‘shoebox’ developments in Auckland.
  - Well-designed Body Corporates could help with this and should be actively used by developers and Council alike to ensure long-term attractiveness and to allay potential residents’ fears.
- Promotions centering on the vitality, fun and fashion of central city living should not over-shadow the core human desire to be able to “safely walk back to your home at night to be with your family and pets in peace.”
## Summary of Housing Needs for Likely Central City Residents

<table>
<thead>
<tr>
<th>Likely time when moving into Central City</th>
<th>Next 2 years (11%) (refer to Inner City Dwellers and Keen Rebuilders section)</th>
<th>3-5 years (8%) (refer to Mid-Stage Movers section)</th>
<th>5-10 years (29%) (refer to Established Movers section)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are they?</td>
<td>Singles or couples, generally younger moving into the central city.</td>
<td>A wider range of people moving into central city. Still preferred by the younger age group.</td>
<td>Starting to see families moving into the central city. Still more likely to be young people moving into the city.</td>
</tr>
<tr>
<td>What type of housing do they want?</td>
<td>Happy to look at more intensified housing, many are already in this. Smaller numbers of bedrooms</td>
<td>While most are in more traditional stand-alone housing, they are willing to consider the options. Needing more housing with larger no. of bedrooms (i.e. 3)</td>
<td>This group prefers stand-alone housing.</td>
</tr>
<tr>
<td>What are the most important aspects to a dwelling?</td>
<td>Privacy, safety at night and pets. Also for walking distance to services for Keen Rebuilders.</td>
<td>Privacy, safety at night and pets. Green building features important.</td>
<td>Privacy, safety at night and pets.</td>
</tr>
<tr>
<td>What facilities do they want available?</td>
<td>Bars/ restaurants/ cafes. Cultural activities – music, theatres, movies.</td>
<td>Bars/ restaurants/ cafes. Cultural activities. Outdoor spaces such as parks or playgrounds.</td>
<td>A more active/ sporty group, this is when the sports facilities need to be made available.</td>
</tr>
<tr>
<td>How many are there? *</td>
<td>5% are already living in the inner city and 6% are Keen Rebuilders.</td>
<td>8% are Mid-Stage Movers</td>
<td>29% are Established Movers.</td>
</tr>
</tbody>
</table>

*Balance to 100% comprises those not interested in central city living at all – 52%.
The remaining 52% are ‘Confirmed Suburbanites’ who are unlikely to ever live in the central city

- Families with children of all ages, and mature couples.
- A fifth of this group are retired and a quarter are aged over 65+.
- High levels of home ownership, with 1 in 7 owning their home.
- Tend to be long stayers, with over a quarter having lived in their home for over 15 years.
- The majority are living in standalone homes and would like to keep it that way as few are willing to consider intensified housing options.
- They tend to be looking for bigger homes with 3 or 4 bedrooms.
- They don’t want to live in the central city because they perceive it to be too cramped, lacking in privacy, too busy and just not appealing. They are also happy living where they are and have everything close that they need.

- This group is not further examined in this summary report as they are not the target market for inner-city developments.

Reasons for Wanting to Stay in the Suburbs

- Like my space / open spaces, too cramped / confined
- Want land, garden, trees, outdoor living, play areas
- Suburbs / outskirts of the city preferred
- Noise - like peace & quiet
- Happy / like where I am, access what I need, close to city
- Have family / not suited to raise a family
- Privacy is important to me
- Landscape / views, want to be near the sea, hills, parks, walks
- The central city does not appeal
- Too many people, crowded, living too close together
- Too busy, dislike hustle & bustle of the city
- Lifestyle / interests, etc
- Earthquake issues / memories, concerns
- Country / rural living preferred, am a country person
- Stand-alone / own home wanted
- Cost, too expensive
- High-rise / apartment living not for me
- Traffic, traffic congestion, traffic noise
- Have animals / pets, not pet friendly
- Crime, violence, security, alcohol, vandalism, safety issues
- Age, too old
- I could consider it if / but...
- Types of neighbours / tenants / no community atmosphere / impersonal
- Design / construction / building quality / concrete jungle
- Not convenient for work
- DX / NR
- Parking issues / costs
- Other
- Pollution, dirty, untidy, no clean air
- Access / travelling
- Schools, preschools
- One level / no stairs / easy access wanted
- Dislike what is happening in city / council actions
- Safety issues (unsure if code 5 or 12)
- Leaving / considering leaving CHCH
- Storage / workshop / garage, bigger home, etc needed
- The shopping / malls / supermarkets outside the city
- Want to be near family / friends
- City is commercial / business / shopping / bars / cafés
- Like the concept, would suit... but not for me
- Want to live away from where I work
Conclusions and Recommendations

- There is clearly a solid, encouraging level of interest in moving back to the rebuilt central city.

- Yet there is a natural tension between an interest in considering a move to the central city and a desire to wait until development has progressed to a point at which people can see that the planned rebuild is succeeding.
  
  - This means that the earliest developments will better suit childless professionals (renting and buying) who are prepared to ‘take a risk’. Those with children want more assurance that they will be moving into a safe, established neighbourhood and not a building site. Developers should build with segments in mind, dictated to some extent by the planned dates of occupancy.

- The reasons why confirmed suburbanites want to stay where they are echo the preferences that people cite when considering a central city lifestyle (i.e. most people want the same thing regardless of where they live), which is a desire for a nice neighbourhood, privacy, safety, pets, and some outdoor green space, preferably through having a detached house.

  - This means that developers will have to build complexes that deliver these attributes as much as possible. Granted it appears that people ‘want their cake and to eat it too’ in regards to their inner-city design preferences – more exploratory qualitative research may be useful to uncover more about what people want.

- Also of importance is the need to address people’s preconceptions of central city residential developments. There remains the perception that these can be of poor quality, with high density ‘shoebox’ housing and poor long-term maintenance.

  - Therefore it will be important for potential residents to know that they will have the same, if not greater, level of control over their property and neighbourhood as they feel they have in suburbia. Our understanding is that these is best achieved in multi-tenant/owner developments via well designed and managed body corporates. Therefore these should be actively encouraged to the fullest extent possible by both the Council and developers.
Key Findings: Segment Preferences
Inner-city dwellers

This group is made up of participants who indicated they already live in the central city.

Confirmed Suburbanites, 52%

Keen rebuilders, 6%

Mid-stage movers, 8%

Established movers, 29%

All other segments, n=2,112

Inner-city dwellers, 5% n=99

Note: base sizes for segments apply to whole chapter unless otherwise stated
Segment Summaries: Inner City Dwellers (5%)

- Singles and couples with no children.
- More likely to have moved since the earthquake.
- Less likely to own their own home.
- Nearly half are living in intensified housing.
- Many looking for smaller places e.g. a third looking for studio apartments to rent and flats, apartments and attached houses to purchase.
- They are most often out shopping, going to bars/cafes during the day, or playing outdoor sports. They are more likely to go out to movies, concerts, and art galleries than the other groups.

- Inner-city dwellers have more energetic, self/fun-focussed lives, stronger than the other segments on the elements of vitality, enjoyment and power – but still valuing security, conviviality and a sense of belonging.

Inner-city dwellers (n=99)
Inner-city dwellers – who are they? (i)

Households without children dominate this segment; in particular, there is a significantly higher proportion of younger couples without children than in the other segments. The ‘Inner-City Dweller’ segment also has a higher percentage of beneficiaries and lower household incomes (less than $40,000) than the other segments.

### Occupation of main income earner

- **Manager**: 14% Inner-city dwellers, 12% all others
- **Professional**: 25% Inner-city dwellers, 10% all others
- **Technician & trades worker**: 11% Inner-city dwellers, 10% all others
- **Community & personal services worker**: 5% Inner-city dwellers, 3% all others
- **Clerical & administrative worker**: 7% Inner-city dwellers, 4% all others
- **Sales or retail worker**: 5% Inner-city dwellers, 8% all others
- **Machinery operator & driver**: 0% Inner-city dwellers, 4% all others
- **Labourer**: 8% Inner-city dwellers, 4% all others
- **Student**: 5% Inner-city dwellers, 4% all others
- **Home executive**: 1% Inner-city dwellers, 2% all others
- **Beneficiary**: 12% Inner-city dwellers, 4% all others
- **Retired**: 6% Inner-city dwellers, 15% all others
- **Other**: 3% Inner-city dwellers, 1% all others
- **No response**: 5% Inner-city dwellers, 1% all others

**Household situation - Top 5 groups**

- **24%** - Mature couple – no children / none at home
- **17%** - Single- / one-person household
- **15%** - Younger couple without children (other segments 7%)
- **11%** - Household with youngest child 5-13
- **10%** - Flat – not a family home

### Total household income before tax

- **Loss**: 2% Inner-city dwellers, 1% all others
- **No income**: 1% Inner-city dwellers, 2% all others
- **Less than $40,000**: 29% Inner-city dwellers, 29% all others
- **$40,001-$80,000**: 24% Inner-city dwellers, 24% all others
- **$80,001-$150,000**: 21% Inner-city dwellers, 26% all others
- **More than $150,000**: 9% Inner-city dwellers, 9% all others
- **Prefer not to say**: 14% Inner-city dwellers, 15% all others
- **No response**: 1% Inner-city dwellers, 1% all others

*Significantly higher than other segments = GREEN*
*Significantly lower than other segments = RED*
*Base: Total sample*
A higher proportion of females indicated they are already in the inner city. Inner-city dwellers have a similar age profile as the other segments – peaking in the 35-49 year age group. Ethnicity also follows a similar profile, although some indicative results show more cultural diversity, i.e. more Pacific Islanders and ‘other’ ethnicities in this group.

**Gender**

- **All other segments**: 49% female, 51% male
- **Inner-city dwellers**: 49% female, 51% male

**Ethnicity**

- **New Zealand Maori**: 8% All other segments, 6% Inner-city dwellers
- **New Zealand European**: 84% All other segments, 81% Inner-city dwellers
- **Pacific Islander**: 1% All other segments, 5% Inner-city dwellers
- **Asian**: 6% All other segments, 6% Inner-city dwellers
- **Other**: 5% All other segments, 7% Inner-city dwellers
- **No response**: 1% All other segments, 0% Inner-city dwellers

**Ward**

- **Shirley-Papanui Ward**: 25%
- **Fendalton-Waimairi Ward**: 11%
- **Burwood-Pegasus Ward**: 2%
- **Riccarton-Wigram Ward**: 9%
- **Hagley-Ferrymead Ward**: 48%
- **Spreydon-Heathcote Ward**: 11%
- **Banks Peninsula Ward**: 3%

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample
Inner-city dwellers – where do they live now?

Unsurprisingly, a higher proportion of those living in the inner city now have had to move due to the earthquake (19%). In this segment it is more common to live an attached house, flat or apartment than other segments, likely to due to the central-city location with its more readily available intensified housing. Home ownership is also lower, as well as tenure in home (a lower proportion of Inner-City Dwellers have lived in their homes for more than 15 years).

Ownership of usual dwelling

<table>
<thead>
<tr>
<th>Ownership</th>
<th>63%</th>
<th>46%</th>
</tr>
</thead>
<tbody>
<tr>
<td>You personally or jointly own it</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Family member owns it</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>You rent it from the local council, or Housing New Zealand</td>
<td>19%</td>
<td>37%</td>
</tr>
<tr>
<td>You rent from a private landlord</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Living in same dwelling as Feb 2011 earthquake

- No, moved for other reason, 16%
- No, moved due to earthquake, 19%
- Yes, 65%

Length of time at usual address

- Less than one year: 11%
- 1-2 years: 16%
- 3-5 years: 21%
- 6-10 years: 20%
- 11-15 years: 10%
- More than 15 years: 23%

Type of usual dwelling

- 47% Stand-alone house (83% all other segments)
- 17% Attached house (8% all other segments)
- 17% Flat (7% all other segments)
- 13% Apartment (1% all other segments)
- 8% Other

Q4. Which of the following best describes who owns the dwelling (that is the house / townhouse / flat / apartment, etc) that you usually live in? Q5. Are you living in the same dwelling that you were in during the February 22nd 2011 earthquake? Q6. What type of dwelling is your usual dwelling? Q7. How long have you been living in your usual dwelling?
Inner-city dwellers have more energetic, self/fun-focused lives

‘Security’ and ‘conviviality’ are the strongest personality aspects across all segments. In terms of personality, a higher proportion amongst those who already live in the inner city relate to ‘enjoyment’, ‘vitality’ and ‘power’ than in other segments.

Inner-city dwellers (n=99)

- **Vitality**, 26%
- **Power**, 24%
- **Recognition**, 18%
- **Control**, 15%
- **Enjoyment**, 19%
- **Conviviality**, 35%
- **Belonging**, 23%
- **Security**, 38%

Total Sample (n=2,112)

- **Vitality**, 12%
- **Power**, 15%
- **Recognition**, 12%
- **Control**, 21%
- **Belonging**, 29%
- **Security**, 15%
- **Conviviality**, 31%
- **Enjoyment**, 12%

Showing percentage who gave each lifestyle segment an 8-10 score out of 10.

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q18. There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?

Inner-city dwellers are more likely to be doing arts and cultural activities such as going to the movies, museums and the theatre, often when compared to the other segments.

Are more likely to often*…
- Go to the movies
- Go to a concert or the theatre
- Visit a museum or art gallery
- Shopping

Are less likely to often*…
- Garden

*‘Often’ refers to at least once a week
Inner-city dwellers – leisure time (ii)

Inner-city dwellers do a lot of shopping; they also visit bars and restaurants regularly.

**Frequency of spare time activities**

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 or more times a week</th>
<th>2 to 4 times a week</th>
<th>Once a week</th>
<th>Less than once a month</th>
<th>Never</th>
<th>2 to 3 times a month</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to a bar / café / restaurant during the day</td>
<td>10%</td>
<td>21%</td>
<td>18%</td>
<td>14%</td>
<td>11%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Play an outdoor sport without special facilities</td>
<td>14%</td>
<td>19%</td>
<td>13%</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
<td>29%</td>
</tr>
<tr>
<td>Visit a public park or playground</td>
<td>8%</td>
<td>15%</td>
<td>22%</td>
<td>16%</td>
<td>13%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Gardening</td>
<td>11%</td>
<td>11%</td>
<td>19%</td>
<td>15%</td>
<td>11%</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>Go to a bar / café / restaurant at night</td>
<td>4%</td>
<td>10%</td>
<td>23%</td>
<td>16%</td>
<td>12%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Go to a gym or recreation centre</td>
<td>5%</td>
<td>8%</td>
<td>11%</td>
<td>11%</td>
<td>6%</td>
<td>13%</td>
<td>43%</td>
</tr>
<tr>
<td>Visit a public swimming pool</td>
<td>7%</td>
<td>15%</td>
<td>6%</td>
<td>7%</td>
<td>24%</td>
<td>35%</td>
<td>4%</td>
</tr>
<tr>
<td>Meet with people for an indoor hobby</td>
<td>3%</td>
<td>4%</td>
<td>15%</td>
<td>6%</td>
<td>7%</td>
<td>21%</td>
<td>40%</td>
</tr>
<tr>
<td>Play an outdoor sport at a special facility</td>
<td>4%</td>
<td>5%</td>
<td>13%</td>
<td>8%</td>
<td>3%</td>
<td>13%</td>
<td>51%</td>
</tr>
<tr>
<td>Go to the library</td>
<td>8%</td>
<td>10%</td>
<td>9%</td>
<td>15%</td>
<td>29%</td>
<td>25%</td>
<td>3%</td>
</tr>
<tr>
<td>Go to movies</td>
<td>3%</td>
<td>7%</td>
<td>12%</td>
<td>21%</td>
<td>41%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Play an indoor sport</td>
<td>3%</td>
<td>7%</td>
<td>1%</td>
<td>6%</td>
<td>18%</td>
<td>60%</td>
<td>4%</td>
</tr>
<tr>
<td>Visit a museum or art gallery</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>49%</td>
<td>17%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Go to a concert or the theatre</td>
<td>6%</td>
<td>9%</td>
<td>15%</td>
<td>42%</td>
<td>21%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Go to a sports event as a spectator</td>
<td>5%</td>
<td>7%</td>
<td>11%</td>
<td>28%</td>
<td>42%</td>
<td>42%</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Significantly higher than other segments = GREEN  Significantly lower than other segments = RED*

Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
Keen Rebuilders

This group is made up of participants who indicated they would consider living in the central city now (within the next two years).

- Keen Rebuilders, 6% n=109
- Mid-Stage Movers, 8%
- Established movers, 29%
- All other segments, n=2,102
- Inner-city dwellers, 5%
- Anti-central city, 52%

Note: base sizes for segments apply to whole chapter unless otherwise stated.
Segment Summary: Keen Rebuilders (6%)

- Singles or couples, with a skew towards the younger age groups – students or young professionals.
- Also more in the higher income bracket, $80,000-$150,000.
- Homeownership much lower than other groups, only a third own their homes, whereas nearly half rent them.
- A bit more transient, with a third having moved since the earthquake for some ‘other reason’ and more likely to have only lived in current house for less than 2 years.
- While two thirds do live in standalone homes, there are more who live in flats or attached houses than across other segments. They are certainly willing to consider moving into more intensified housing options.
- 2 bedroom homes popular amongst this group.
- Similar to current inner city dwellers they like to go shopping, visit bars and cafes and play outdoor sports.

- Keen Rebuilders are more focussed on the vitality of their lives, less so on power or control.
- As with all segments, more Keen Rebuilders also associate themselves with ‘conviviality’ and ‘security’.
Keen Rebuilders – who are they? (i)

Keen Rebuilders are most often coming from households without children, generally younger households such as flats or young couples, although nearly a fifth are mature couples. They are more likely than other segments to be students. Also, a higher proportion in the $80-$100k household income bracket.

### Occupation of main income earner

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Keen Rebuilders (n=109)</th>
<th>All other segments (n=2,102)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>Professional</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Technician &amp; trades worker</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Community &amp; personal services worker</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Clerical &amp; administrative worker</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Sales or retail worker</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Machinery operator &amp; driver</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Labourer</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Student</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Home executive</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Beneficiary</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Retired</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>No response</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Household situation - Top 5 groups

- **18%** - Flat – not a family home (other segments 6%)
- **17%** - Mature couple – no children / none at home (other segments 27%)
- **16%** - Single- / one-person household
- **15%** - Younger couple without children (other segments 7%)
- **12%** - Household with youngest child 14 and over

### Total household income before tax

- Less than $40,000: Keen Rebuilders 21%, All other segments 9%
- $40,001-$60,000: Keen Rebuilders 18%, All other segments 10%
- $60,001-$80,000: Keen Rebuilders 29%, All other segments 25%
- $80,001-$100,000: Keen Rebuilders 24%, All other segments 24%
- More than $100,000: Keen Rebuilders 36%, All other segments 9%
- Prefer not to say: Keen Rebuilders 15%, All other segments 12%
- No response: Keen Rebuilders 12%, All other segments 1%
Keen Rebuilders – who are they? (ii)

They tend to be younger, with a significantly higher proportion in the 18-24 year age bracket and significantly lower in the 50+ age bracket. Although not significant, a slightly higher proportion of Maori and ‘other’ ethnicities.

**Age**

- **18-24 years**: Keen Rebuilders (11%) vs. All other segments (13%)
- **25-34 years**: Keen Rebuilders (19%) vs. All other segments (17%)
- **35-49 years**: Keen Rebuilders (24%) vs. All other segments (26%)
- **50-64 years**: Keen Rebuilders (15%) vs. All other segments (24%)
- **65+ years**: Keen Rebuilders (11%) vs. All other segments (13%)

**Ethnicity**

- **New Zealand Maori**: Keen Rebuilders (11%) vs. All other segments (7%)
- **New Zealand European**: Keen Rebuilders (86%) vs. All other segments (83%)
- **Pacific Islander**: Keen Rebuilders (2%) vs. All other segments (0%)
- **Asian**: Keen Rebuilders (6%) vs. All other segments (2%)
- **Other**: Keen Rebuilders (5%) vs. All other segments (8%)
- **No response**: Keen Rebuilders (1%) vs. All other segments (0%)

**Ward**

- **Shirley-Papanui Ward**: Keen Rebuilders (23%) vs. All other segments (17%)
- **Fendalton-Waimairi Ward**: Keen Rebuilders (14%) vs. All other segments (16%)
- **Burwood-Pegasus Ward**: Keen Rebuilders (18%) vs. All other segments (16%)
- **Riccarton-Wigram Ward**: Keen Rebuilders (18%) vs. All other segments (16%)
- **Hagley-Ferrymead Ward**: Keen Rebuilders (15%) vs. All other segments (12%)
- **Spreydon-Heathcote Ward**: Keen Rebuilders (15%) vs. All other segments (16%)
- **Banks Peninsula Ward**: Keen Rebuilders (3%) vs. All other segments (2%)

**Gender**

- **All other segments**: Male (52%) vs. Female (48%)
- **Keen Rebuilders**: Male (55%) vs. Female (45%)

*Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample*
Keen Rebuilders – where do they live now?

The ‘Keen Rebuilder’ group is more transient, with more living in rented dwellings for two years or less. They are also more likely to have moved since February 2011 for reasons other than the earthquake. A higher proportion of this group are living in flats and attached houses, and fewer are living in stand-alone homes.

Ownership of usual dwelling

- You personally or jointly own it: 64%
- Family member owns it: 12%
- You rent it from the local council, or Housing New Zealand: 3%
- You rent from a private landlord: 19%
- Other: 1%

Living in same dwelling as Feb 2011 earthquake

- No, moved for other reason: 32%
- No, moved due to earthquake: 10%
- Yes: 58%

Length of time at usual address

- Less than one year: 26%
- 1-2 years: 24%
- 3-5 years: 21%
- 6-10 years: 20%
- 11-15 years: 13%
- More than 15 years: 23%

78% of all other segments are in the same house

Type of usual dwelling

- 62% Stand-alone house
- 20% Flat
- 13% Attached house
- 2% Apartment
- 3% Other

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample

Q4. Which of the following best describes who owns the dwelling (that is the house / townhouse / flat / apartment, etc) that you usually live in? Q5. Are you living in the same dwelling that you were in during the February 22nd 2011 earthquake? Q6. What type of dwelling is your usual dwelling? Q7. How long have you been living in your usual dwelling?
Keen Rebuilders – more focussed on the vitality of their lives, less so on power or control.

As with all segments, more Keen Rebuilders associate themselves with ‘conviviality’ and ‘security’. A higher proportion of Keen Rebuilders associate themselves with ‘vitality’ than across other segments.

Keen Rebuilders (n=109)

Vitality, 25%
Conviviality, 26%
Power, 16%
Belonging, 21%
Recognition, 6%
Security, 28%
Control, 7%
Enjoyment, 13%

Total Sample (n=2,102)

Vitality, 12%
Conviviality, 32%
Power, 15%
Belonging, 29%
Recognition, 13%
Security, 33%
Control, 21%
Enjoyment, 12%

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q18. There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
Keen Rebuilders – leisure time (i)

Keen Rebuilders are often out socialising at bars and restaurants (a higher proportion do ‘at least once a week’ than across the other segments). They are also at concerts or keeping fit at the gym.

Are more likely to often*...
• Go to a concert or the theatre
• Got to a gym or recreation centre
• Go to a bar / café / restaurant during the day
• Go to a bar / café / restaurant at night

Are less likely to often*...
• Garden

*Often refers to at least once a week

Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
## Keen Rebuilders – leisure time (ii)

Shopping, visiting cafés during the day and going to the gym are activities done most often.

### Frequency of spare time activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 or more times a week</th>
<th>2 to 4 times a week</th>
<th>Once a week</th>
<th>Less than once a month</th>
<th>Never</th>
<th>2 to 3 times a month</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>7%</td>
<td>22%</td>
<td>32%</td>
<td>19%</td>
<td>7%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Go to a bar / café / restaurant during the day</td>
<td>6%</td>
<td>21%</td>
<td>26%</td>
<td>16%</td>
<td>12%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Play an outdoor sport without special facilities</td>
<td>13%</td>
<td>22%</td>
<td>14%</td>
<td>7%</td>
<td>8%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Go to a gym or recreation centre</td>
<td>9%</td>
<td>14%</td>
<td>14%</td>
<td>2%</td>
<td>4%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Go to a bar / café / restaurant at night</td>
<td>3%</td>
<td>18%</td>
<td>14%</td>
<td>3%</td>
<td>5%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Visit a public park or playground</td>
<td>4%</td>
<td>12%</td>
<td>17%</td>
<td>15%</td>
<td>23%</td>
<td>20%</td>
<td>8%</td>
</tr>
<tr>
<td>Gardening</td>
<td>3%</td>
<td>18%</td>
<td>14%</td>
<td>16%</td>
<td>13%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Meet with people for an indoor hobby</td>
<td>6%</td>
<td>17%</td>
<td>9%</td>
<td>15%</td>
<td>20%</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Visit a public swimming pool</td>
<td>6%</td>
<td>11%</td>
<td>11%</td>
<td>7%</td>
<td>39%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Play an outdoor sport at a special facility</td>
<td>4%</td>
<td>14%</td>
<td>5%</td>
<td>5%</td>
<td>29%</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Go to the library</td>
<td>7%</td>
<td>8%</td>
<td>16%</td>
<td>16%</td>
<td>30%</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>Play an indoor sport</td>
<td>9%</td>
<td>5%</td>
<td>11%</td>
<td>24%</td>
<td></td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Go to a concert or the theatre</td>
<td>7%</td>
<td>8%</td>
<td>16%</td>
<td>24%</td>
<td>55%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Go to the movies</td>
<td>7%</td>
<td>18%</td>
<td>21%</td>
<td>45%</td>
<td>44%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Go to a sports event as a spectator</td>
<td>5%</td>
<td>14%</td>
<td>16%</td>
<td>45%</td>
<td></td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Visit a museum or art gallery</td>
<td>11%</td>
<td>21%</td>
<td>52%</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Significantly higher than other segments = GREEN  Significantly lower than other segments = RED**

**Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?**
Mid-Stage Movers

- Keen Rebuilders, 6%
- Inner-city dwellers, 5%
- Confirmed Suburbanites, 52%
- Established Movers, 29%
- Mid-Stage Movers, 8% n=166

All other segments, n=2,045

Note: base sizes for segments apply to whole chapter unless otherwise stated.
**Segment Summary: Mid-Stage Movers (8%)**

- More of a mixture of household types, with more family groups, but still also a lot of single/couple households (who may be thinking of moving in to the central city once they have started their families).
- Still plenty of students and younger people.
- Homeownership still lower amongst this group (about half), with a third renting their home.
- This group is still currently living in more traditional standalone homes, but they are open to other options when it comes to renting or purchasing a home.
- They are looking for slightly bigger homes with half wanting a 3 bedroom home when they make a purchase.
- Beyond the activities of the previous segments, this group also goes to a public park/playground more often.

- Mid-Stage Movers value a sense of belonging, security & conviviality.
- This is not markedly different from the other segments. This is likely to be due to the mix of life-stages and types of people that are included in this segment.
Mid-Stage Movers are not as easily defined by their demographic characteristics, with a mixture of life stages, incomes and occupations falling into this category. There are significantly higher proportions of flatters, students, beneficiaries and managers.

Occupation of main income earner

- Manager: 17% Mid-stage movers vs 12% All other segments
- Professional: 24% Mid-stage movers vs 31% All other segments
- Technician & trades worker: 12% Mid-stage movers vs 6% All other segments
- Community & personal services worker: 4% Mid-stage movers vs 3% All other segments
- Clerical & administrative worker: 8% Mid-stage movers vs 3% All other segments
- Sales or retail worker: 8% Mid-stage movers vs 5% All other segments
- Machinery operator & driver: 4% Mid-stage movers vs 4% All other segments
- Labourer: 4% Mid-stage movers vs 5% All other segments
- Student: 9% Mid-stage movers vs 4% All other segments
- Home executive: 2% Mid-stage movers vs 2% All other segments
- Beneficiary: 4% Mid-stage movers vs 3% All other segments
- Retired: 7% Mid-stage movers vs 9% All other segments
- Other: 1% Mid-stage movers vs 1% All other segments
- No response: 1% Mid-stage movers vs 1% All other segments

Household situation - Top 5 groups

- 18% - Household with youngest child over 14
- 17% - Mature couple – no children / none at home (other segments 28%)
- 15% - Household with youngest child under 5
- 14% - Single- / one-person household
- 11% - Flat – not a family home (other segments 7%)

Total household income before tax

- Loss: 1%
- No income: 1%
- Less than $40,000: 21%
- $40,001-$50,000: 19%
- $50,001-$70,000: 28%
- $70,001-$100,000: 32%
- More than $100,000: 26%
- Prefer not to say: 12%
- No response: 10%

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample
Mid-Stage Movers – who are they? (ii)

Mid-Stage Movers do, however, include a higher proportion of young people aged 18-24, and a lower proportion of those aged 65+.

They are perhaps more multi-cultural with a higher proportion identifying with ‘other’ ethnicities.

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample
Mid-Stage Movers – where do they live now?

The majority of Mid-Stage Movers are currently in a stand-alone house. There is a higher proportion of those who rent. They are also more likely to have lived in the address for less than 1 year.

Ownership of usual dwelling:
- You personally or jointly own it: 64% (48% for Mid-stage movers)
- Family member owns it: 12% (15% for Mid-stage movers)
- You rent it from the local council, or Housing New Zealand: 3% (4% for Mid-stage movers)
- You rent from a private landlord: 19% (31% for Mid-stage movers)
- Other: 1% (2% for Mid-stage movers)

Living in same dwelling as Feb 2011 earthquake:
- Yes, 72%
- No, moved due to earthquake, 13%
- No, moved for other reason, 15%

Length of time at usual address:
- Less than one year: 11% (18% for Mid-stage movers)
- 1-2 years: 16% (16% for Mid-stage movers)
- 3-5 years: 20% (21% for Mid-stage movers)
- 6-10 years: 19% (21% for Mid-stage movers)
- 11-15 years: 10% (11% for Mid-stage movers)
- More than 15 years: 13% (23% for Mid-stage movers)

Type of usual dwelling:
- Stand-alone house: 78%
- Attached house: 10%
- Flat: 7%
- Apartment: 3%
- Other: 2%

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample

Q4. Which of the following best describes who owns the dwelling (that is the house / townhouse / flat / apartment, etc) that you usually live in? Q5. Are you living in the same dwelling that you were in during the February 22nd 2011 earthquake? Q6. What type of dwelling is your usual dwelling? Q7. How long have you been living in your usual dwelling?
Mid-Stage Movers value a sense of belonging, security & conviviality.

There are no strong personality traits that are markedly different from the other segments. This is likely to be due to the mix of life-stages and types of people that are included in this segment.

Q18. There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
Mid-Stage Movers – leisure time (i)

This group is more likely to participate in cultural activities, socialising at bars and restaurants, and activities such as the gym or visiting the park.

Are more likely to often*...
• Go to the movies
• Go to a concert or the theatre
• Go to a gym or recreation centre
• Go to a bar / café / restaurant during the day
• Go to a bar / café / restaurant at night
• Visit a public park or playground
• Visit a museum or art gallery

Are less likely to often*...
• Garden

*Often refers to at least once a week

Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
Mid-Stage Movers – leisure time (ii)

Shopping is the most regular activity, followed by visiting cafés during the day and playing outdoor sports.

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 or more times a week</th>
<th>2 to 4 times a week</th>
<th>Once a week</th>
<th>2 to 3 times a month</th>
<th>Never</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to a bar / café / restaurant during the day</td>
<td>3%</td>
<td>32%</td>
<td>37%</td>
<td>14%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Play an outdoor sport without special facilities</td>
<td>10%</td>
<td>27%</td>
<td>15%</td>
<td>8%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Visit a public park or playground</td>
<td>5%</td>
<td>13%</td>
<td>28%</td>
<td>19%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Go to a bar / café / restaurant at night</td>
<td>8%</td>
<td>37%</td>
<td>10%</td>
<td>4%</td>
<td>6%</td>
<td>18%</td>
</tr>
<tr>
<td>Go to a gym or recreation centre</td>
<td>8%</td>
<td>24%</td>
<td>22%</td>
<td>10%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Gardening</td>
<td>4%</td>
<td>14%</td>
<td>22%</td>
<td>10%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Play an outdoor sport at a special facility</td>
<td>7%</td>
<td>15%</td>
<td>7%</td>
<td>7%</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Go to the library</td>
<td>4%</td>
<td>18%</td>
<td>15%</td>
<td>16%</td>
<td>27%</td>
<td>38%</td>
</tr>
<tr>
<td>Visit a public swimming pool</td>
<td>4%</td>
<td>13%</td>
<td>13%</td>
<td>8%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Play an indoor sport</td>
<td>6%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
<td>21%</td>
<td>47%</td>
</tr>
<tr>
<td>Meet with people for an indoor hobby</td>
<td>3%</td>
<td>13%</td>
<td>12%</td>
<td>24%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Go to the movies</td>
<td>9%</td>
<td>18%</td>
<td>23%</td>
<td>39%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Go to a concert or the theatre</td>
<td>8%</td>
<td>8%</td>
<td>18%</td>
<td>45%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Visit a museum or art gallery</td>
<td>7%</td>
<td>9%</td>
<td>24%</td>
<td>41%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Go to a sports event as a spectator</td>
<td>4%</td>
<td>7%</td>
<td>16%</td>
<td>45%</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Ordered from activities carried out the most ‘at least once per week’ to those carried out the least ‘at least once per week’

Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Established Movers

- Keen Rebuilders, 6%
- Inner-city dwellers, 5%
- Mid-Stage Movers, 8%
- Established Movers, 29%, n=622
- All other segments, n=1,589

Confirmed Suburbanites, 52%

Note: base sizes for segments apply to whole chapter unless otherwise stated.
Segment Summary: Established Movers (29%)

- This segment will bring more families into the central city.
- There are more professionals in this group and those in the household income bracket of $80,000-$150,000.
- They are currently living in standalone homes, and a small proportion are willing to consider other options. They would like to live in bigger homes with 3 bedrooms.
- This group is very active, playing sports more often than other segments.

- Established Movers show little differentiation from all other segments, scoring highest in the areas of ‘conviviality’, ‘belonging’ and ‘security’.

Established Movers (n=622)
Established Movers – who are they? (i)

Established Movers are significantly more likely to sit in higher-income brackets, and for the main income earner to be a professional. Although around a quarter of the group are a mature couple with no children / no children at home, the group has more households with children over 14 in it than all other segments.

### Occupation of main income earner

- **Manager**: 12% in Established movers, 13% in all other segments
- **Professional**: 23% in Established movers, 6% in all other segments
- **Technician & trades worker**: 11% in Established movers, 8% in all other segments
- **Community & personal services worker**: 4% in Established movers, 3% in all other segments
- **Clerical & administrative worker**: 7% in Established movers, 6% in all other segments
- **Sales or retail worker**: 5% in Established movers, 6% in all other segments
- **Machinery operator & driver**: 4% in Established movers, 4% in all other segments
- **Labourer**: 4% in Established movers, 5% in all other segments
- **Student**: 3% in Established movers, 3% in all other segments
- **Home executive**: 2% in Established movers, 2% in all other segments
- **Beneficiary**: 2% in Established movers, 5% in all other segments
- **Retired**: 16% in Established movers, 11% in all other segments
- **Other**: 1% in Established movers, 0% in all other segments
- **No response**: 2% in Established movers, 1% in all other segments

### Household situation - Top 5 groups

- **25%** - Mature couple – no children / none at home
- **19%** - Household with youngest child over 14 (other segments 12%)
- **14%** - Household with youngest child under 5
- **13%** - Household with youngest child 5-13
- **11%** - Single- / one-person household

### Total household income before tax

- **Less than $40,000**: 22% in Established movers, 16% in all other segments
- **$40,001-$80,000**: 29% in Established movers, 29% in all other segments
- **$80,001-$150,000**: 24% in Established movers, 29% in all other segments
- **More than $150,000**: 7% in Established movers, 12% in all other segments
- **Prefer not to say**: 15% in Established movers, 13% in all other segments
- **No response**: 2% in Established movers, 2% in all other segments

*Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample*
Established Movers – who are they? (ii)

Established Movers are predominantly 35-64 years old; however, there is a higher number of 18-24 year olds than in all other sections. A fifth of the Established Movers are from the Fendarlon-Pegasus Ward, which is significantly higher than would be expected from all other segments.

- **Age**:
  - 18-24 years: 13% (Others: 19%)
  - 25-34 years: 17% (Others: 15%)
  - 35-49 years: 26% (Others: 28%)
  - 50-64 years: 23% (Others: 25%)
  - 65+ years: 21% (Others: 13%)

- **Ethnicity**:
  - New Zealand Maori: 8% (Established: 8%)
  - New Zealand European: 84% (Established: 83%)
  - Pacific Islander: 2% (Established: 1%)
  - Asian: 5% (Established: 7%)
  - Other: 5% (Established: 5%)
  - No response: 1% (Established: 1%)

- **Ward**:
  - Shirley-Papanui Ward: 17%
  - Fendarlon-Wimalri Ward: 15%
  - Burwood-Pegasus Ward: 16%
  - Riccarton-Wigrum Ward: 18%
  - Hagley-Ferrymead Ward: 16%
  - Spreydon-Heathcote Ward: 15%
  - Banks Peninsula Ward: 2%

- **Gender**:
  - All other segments: 52% Male, 47% Female
  - Established Movers: 49% Male, 51% Female

Significantly higher than other segments = **GREEN**
Significantly lower than other segments = **RED**
Base: Total sample
Established Movers – where do they live now?

Established Movers were less likely to own their house, or to have lived in it for less than a year compared to all other segments. The vast majority of the group still live in the same dwelling as February 2011, and for the majority this dwelling is a stand-alone house.

### Ownership of usual dwelling

<table>
<thead>
<tr>
<th>Ownership Type</th>
<th>Established Movers (n=622)</th>
<th>All other segments (n=1,589)</th>
</tr>
</thead>
<tbody>
<tr>
<td>You personally or jointly own it</td>
<td>64%</td>
<td>59%</td>
</tr>
<tr>
<td>Family member owns it</td>
<td>10%</td>
<td>18%</td>
</tr>
<tr>
<td>You rent it from the local council, or Housing New Zealand</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>You rent from a private landlord</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>Trust / family trust</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Significantly higher than other segments = GREEN**  
**Significantly lower than other segments = RED**  
**Base: Total sample**

### Living in same dwelling as Feb 2011 earthquake

- No, moved for other reason, 13%
- No, moved due to earthquake, 8%
- Yes, 78%

76% of all other segments are in the same house

### Length of time at usual address

<table>
<thead>
<tr>
<th>Length of Time</th>
<th>Established Movers (n=622)</th>
<th>All other segments (n=1,589)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>1-2 years</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>11-15 years</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>More than 15 years</td>
<td>23%</td>
<td>20%</td>
</tr>
</tbody>
</table>

### Type of usual dwelling

- 84% Stand-alone house  
- 8% Attached house  
- 5% Flat (other segments 8%)  
- 1% Apartment  
- 1% Other

**Q4. Which of the following best describes who owns the dwelling (that is the house / townhouse / flat / apartment, etc) that you usually live in?**  
**Q5. Are you living in the same dwelling that you were in during the February 22nd 2011 earthquake?**  
**Q6. What type of dwelling is your usual dwelling?**  
**Q7. How long have you been living in your usual dwelling?**
Established Movers value a sense of belonging, security & conviviality.

Established Movers show little differentiation from all other segments, scoring highest in the areas of ‘conviviality’, ‘belonging’ and ‘security’.

Q18. There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
Established Movers appear to be both an active sporting and an social group, being more likely more often to play sports in a variety of ways and to visit bars / cafés / restaurants.

Are more likely to often* ...
• Go to the movies
• Go to a gym or recreation centre
• Go to a bar / café / restaurant during the day
• Go to a bar / café / restaurant at night
• Visit a public park or playground
• Play an indoor sport
• Play an outdoor sport at a special facility
• Play an outdoor sport without special facilities
• Go to the library
• Meet people for an indoor hobby

Are less likely to often* ...
• Garden

*Often refers to at least once a week

Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
**Established Movers – leisure time (ii)**

Established Movers are likely to often undertake activities such as shopping, playing an outdoor sport without special facilities and going to a bar / café / restaurant during the day.

### Frequency of spare time activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 or more times a week</th>
<th>2 to 4 times a week</th>
<th>Once a week</th>
<th>Less than once a month</th>
<th>Never</th>
<th>2 to 3 times a month</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shopping</strong></td>
<td>2%</td>
<td>28%</td>
<td>35%</td>
<td>7%</td>
<td></td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Play an outdoor sport without special facilities</strong></td>
<td>11%</td>
<td>27%</td>
<td>20%</td>
<td>8%</td>
<td>12%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td><strong>Go to a bar / café / restaurant during the day</strong></td>
<td>4%</td>
<td>19%</td>
<td>20%</td>
<td>7%</td>
<td>15%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Gardening</strong></td>
<td>6%</td>
<td>19%</td>
<td>23%</td>
<td>14%</td>
<td>10%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Visit a public park or playground</strong></td>
<td>6%</td>
<td>15%</td>
<td>21%</td>
<td>14%</td>
<td>17%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Go to a gym or recreation centre</strong></td>
<td>4%</td>
<td>19%</td>
<td>9%</td>
<td>6%</td>
<td></td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td><strong>Go to a bar / café / restaurant at night</strong></td>
<td>8%</td>
<td>23%</td>
<td>9%</td>
<td>4%</td>
<td>6%</td>
<td>21%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Meet with people for an indoor hobby</strong></td>
<td>7%</td>
<td>15%</td>
<td>8%</td>
<td>11%</td>
<td></td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Play an outdoor sport at a special facility</strong></td>
<td>1%</td>
<td>8%</td>
<td>13%</td>
<td>7%</td>
<td>10%</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Go to the library</strong></td>
<td>5%</td>
<td>16%</td>
<td>13%</td>
<td>18%</td>
<td>30%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td><strong>Visit a public swimming pool</strong></td>
<td>6%</td>
<td>11%</td>
<td>7%</td>
<td>10%</td>
<td>37%</td>
<td></td>
<td>27%</td>
</tr>
<tr>
<td><strong>Play an indoor sport</strong></td>
<td>6%</td>
<td>10%</td>
<td>4%</td>
<td>6%</td>
<td>27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Go to a sports event as a spectator</strong></td>
<td>4%</td>
<td>7%</td>
<td>12%</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Go to the movies</strong></td>
<td>6%</td>
<td>10%</td>
<td>24%</td>
<td></td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visit a museum or art gallery</strong></td>
<td>5%</td>
<td>6%</td>
<td>18%</td>
<td></td>
<td>59%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Go to a concert or the theatre</strong></td>
<td>3%</td>
<td>5%</td>
<td>22%</td>
<td></td>
<td>58%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Significantly higher than other segments = GREEN  Significantly lower than other segments = RED*

**Q19. For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?**
Confirmed Suburbanites

This group is made up of participants who indicated they would not consider living in the central city.

- Established movers, 29%
- Mid-stage movers, 8%
- Keen rebuilders, 6%
- Inner-city dwellers, 5%

All other segments, n=1,009

Confirmed Suburbanites, 52% n=1,202

Note: base sizes for segments apply to whole chapter unless otherwise stated
Confirmed Suburbanites (52%): Summary

- Families with children of all ages, and mature couples.
- A fifth of this group are retired and a quarter are aged over 65+.
- High levels of home ownership, with 1 in 7 owning their home. Tend to be long stayers, with over a quarter having lived in their home for over 15 years.
- The majority are living in standalone homes and would like to keep it that way as few are willing to consider intensified housing options.
- They tend to be looking for bigger homes with 3 or 4 bedrooms.
- They don’t want to live in the central city because they perceive it to be too cramped, lacking in privacy, too busy and just not appealing. They are also happy living where they are and have everything close that they need.
Confirmed Suburbanites – who are they? (i)

The Confirmed Suburbanites are significantly more likely to be made up by retired or mature couples (with no children or no children at home). Thus these people are also less likely to fall into the higher-income brackets.

**Occupation of main income earner**

- Manager: 14% (Confirmed Suburbanites: 21%)
- Professional: 11% (Confirmed Suburbanites: 28%)
- Technician & trades worker: 10% (Confirmed Suburbanites: 21%)
- Community & personal services worker: 4% (Confirmed Suburbanites: 5%)
- Clerical & administrative worker: 7% (Confirmed Suburbanites: 5%)
- Sales or retail worker: 6% (Confirmed Suburbanites: 5%)
- Machinery operator & driver: 3% (Confirmed Suburbanites: 5%)
- Labourer: 4% (Confirmed Suburbanites: 5%)
- Student: 2% (Confirmed Suburbanites: 7%)
- Home executive: 2% (Confirmed Suburbanites: 3%)
- Beneficiary: 4% (Confirmed Suburbanites: 4%)
- Retired: 10% (Confirmed Suburbanites: 19%)
- Other: 1% (Confirmed Suburbanites: 1%)

**Household situation - Top 5 groups**

- 31% - Mature couple – no children / none at home (other segments 23%)
- 15% - Household with youngest child under 5
- 14% - Household with youngest child 5-13
- 11% - Household with youngest child over 14 (other segments 17%)
- 12% - Single- / one-person household

**Total household income before tax**

- Loss: 1% (Confirmed Suburbanites: 19%)
- No income: 1% (Confirmed Suburbanites: 1%)
- Less than $40,000: 18% (Confirmed Suburbanites: 22%)
- $40,001-$80,000: 22% (Confirmed Suburbanites: 28%)
- $80,001-$150,000: 29% (Confirmed Suburbanites: 28%)
- More than $150,000: 23% (Confirmed Suburbanites: 12%)
- Prefer not to say: 12% (Confirmed Suburbanites: 6%)
- No response: 17% (Confirmed Suburbanites: 2%)
Confirmed Suburbanites – who are they? (ii)

Matching the occupation statistics, the Confirmed Suburbanites group is significantly more likely to be aged 65+ years and less likely to be aged 18-24. The group is divided fairly evenly between 6 of the wards (excluding the Banks Peninsula), but does have significantly more people from the Burwood-Pegasus Ward.

**Age**

- **18-24 years**: 21% (Confirmed), 8% (All other segments)
- **25-34 years**: 16% (Confirmed), 17% (All other segments)
- **35-49 years**: 27% (Confirmed), 25% (All other segments)
- **50-64 years**: 23% (Confirmed), 25% (All other segments)
- **65+ years**: 13% (Confirmed), 24% (All other segments)
- **No response**: 1% (Confirmed), 1% (All other segments)

**Ethnicity**

- **New Zealand Maori**: 8% (Confirmed), 8% (All other segments)
- **New Zealand European**: 83% (Confirmed), 84% (All other segments)
- **Pacific Islander**: 1% (Confirmed), 2% (All other segments)
- **Asian**: 6% (Confirmed), 5% (All other segments)
- **Other**: 6% (Confirmed), 4% (All other segments)
- **No response**: 1% (Confirmed), 1% (All other segments)

**Gender**

- **51%** (Confirmed Suburbanites), **49%** (All other segments)
- **51%** (Confirmed Suburbanites), **48%** (All other segments)

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample
Confirmed Suburbanites – where do they live now?

The majority of the Confirmed Suburbanites group are still living in the same house as in February 2011, with over a quarter reporting they have been at their current address for more than 15 years. Nearly three-quarters personally or jointly own their dwelling. Most are likely to live in a stand-alone house and are significantly less likely to live in an apartment or flat.

Ownership of usual dwelling

<table>
<thead>
<tr>
<th>Ownership</th>
<th>Confirmed Suburbanites (n=1,202)</th>
<th>All other segments (n=1,009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>You personally or jointly own it</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>Family member owns it</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>You rent it from the local council, or Housing New Zealand</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>You rent from a private landlord</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Living in same dwelling as Feb 2011 earthquake

- Yes, 80%
- No, moved for other reason, 12%
- No, moved due to earthquake, 8%

73% of all other segments are in the same house

Length of time at usual address

<table>
<thead>
<tr>
<th>Length of Time</th>
<th>Confirmed Suburbanites (n=1,202)</th>
<th>All other segments (n=1,009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>1-2 years</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>6-10 years</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>11-15 years</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>More than 15 years</td>
<td>17%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Type of usual dwelling

- 85% Stand-alone house (other segments 10%)
- 7% Attached house (other segments 10%)
- 6% Flat (other segments 8%)
- 0% Apartment (other segments 3%)
- 1% Other

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED
Base: Total sample

Q4. Which of the following best describes who owns the dwelling (that is the house / townhouse / flat / apartment, etc) that you usually live in? Q5. Are you living in the same dwelling that you were in during the February 22nd 2011 earthquake? Q6. What type of dwelling is your usual dwelling? Q7. How long have you been living in your usual dwelling?
Confirmed Suburbanites – reasons for not considering living in the central city

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Like my space / open spaces, too cramped / confined</td>
<td>24%</td>
</tr>
<tr>
<td>Want land, garden, trees, outdoor living, play areas</td>
<td>23%</td>
</tr>
<tr>
<td>Suburbs / outskirts of the city preferred</td>
<td>21%</td>
</tr>
<tr>
<td>Noise – like peace &amp; quiet</td>
<td>19%</td>
</tr>
<tr>
<td>Happy / like where I am, access what I need, close to city</td>
<td>12%</td>
</tr>
<tr>
<td>Have family / not suitable to raise a family</td>
<td>9%</td>
</tr>
<tr>
<td>Privacy is important to me</td>
<td>9%</td>
</tr>
<tr>
<td>Landscape / views, want to be near the sea, hills, parks, walks</td>
<td>8%</td>
</tr>
<tr>
<td>The central city does not appeal</td>
<td>8%</td>
</tr>
<tr>
<td>Too many people, crowded, living too close together</td>
<td>8%</td>
</tr>
<tr>
<td>Too busy, dislike hustle &amp; bustle of the city</td>
<td>8%</td>
</tr>
<tr>
<td>Lifestyle / interests, etc</td>
<td>7%</td>
</tr>
<tr>
<td>Earthquake issues / memories, concerns</td>
<td>7%</td>
</tr>
<tr>
<td>Country / rural living preferred, am a country person</td>
<td>6%</td>
</tr>
<tr>
<td>Stand-alone / own home wanted</td>
<td>5%</td>
</tr>
<tr>
<td>Cost, too expensive</td>
<td>5%</td>
</tr>
<tr>
<td>High-rise / apartment living not for me</td>
<td>5%</td>
</tr>
<tr>
<td>Traffic, traffic congestion, traffic noise</td>
<td>4%</td>
</tr>
<tr>
<td>Have animals / pets, not pet friendly</td>
<td>4%</td>
</tr>
<tr>
<td>Crime, violence, security, alcohol, vandalism, safety issues</td>
<td>4%</td>
</tr>
<tr>
<td>Age, too old</td>
<td>4%</td>
</tr>
<tr>
<td>I could consider it if / but..</td>
<td>4%</td>
</tr>
<tr>
<td>Types of neighbours / tenants / no community atmosphere / impersonal</td>
<td>4%</td>
</tr>
<tr>
<td>Design / construction / building quality / concrete jungle</td>
<td>3%</td>
</tr>
<tr>
<td>Not convenient for work</td>
<td>3%</td>
</tr>
<tr>
<td>DK / NR</td>
<td>3%</td>
</tr>
<tr>
<td>Parking Issues / costs</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>Pollution, dirty, untidy, smog, no clean air</td>
<td>2%</td>
</tr>
<tr>
<td>Access / travelling</td>
<td>2%</td>
</tr>
<tr>
<td>Schools, preschools</td>
<td>2%</td>
</tr>
<tr>
<td>One level / no stairs / easy access wanted</td>
<td>2%</td>
</tr>
<tr>
<td>Dislike what is happening in city / council actions</td>
<td>2%</td>
</tr>
<tr>
<td>Safety issues (unsure if code 5 or 12)</td>
<td>2%</td>
</tr>
<tr>
<td>Leaving / considering leaving CHCH</td>
<td>2%</td>
</tr>
<tr>
<td>Storage / workshop / garage, bigger home, etc needed</td>
<td>1%</td>
</tr>
<tr>
<td>The shopping / malls / supermarkets outside the city</td>
<td>1%</td>
</tr>
<tr>
<td>Want to be near family / friends</td>
<td>1%</td>
</tr>
<tr>
<td>City is commercial / business / shopping / bars / cafés</td>
<td>1%</td>
</tr>
<tr>
<td>Like the concept / would suit... but not for me</td>
<td>1%</td>
</tr>
<tr>
<td>Want to live away from where I work</td>
<td>1%</td>
</tr>
</tbody>
</table>

The main reasons are that these people want the spaces, peace, quiet and greenery of suburbia.

**Q15. Why not? Can you please explain to me why you would not consider purchasing or renting in the central city?**
Confirmed Suburbanites want more control and less ‘vitality’ in their lives than most others.

Possibly reflecting the retired nature of the majority of the Confirmed Suburbanites group, ‘vitality’ is significantly less important and ‘control’ is seen as being more important than the other segments.

**Confirmed Suburbanites**  
\(n=1,202\)

- **Vitality**, 15%  
- **Power**, 15%  
- **Recognition**, 12%  
- **Control**, 23%  
- **Enjoyment**, 11%  
- **Conviviality**, 32%  
- **Belonging**, 29%  
- **Security**, 34%

**Total Sample**  
\(n=1,009\)

- **Vitality**, 13%  
- **Power**, 16%  
- **Recognition**, 14%  
- **Control**, 18%  
- **Enjoyment**, 13%  
- **Conviviality**, 30%  
- **Belonging**, 28%  
- **Security**, 32%

**Showing percentage who gave each lifestyle segment an 8-10 score out of 10.**

Significantly higher than other segments = **GREEN**  
Significantly lower than other segments = **RED**

**Q18.** There are lots of ways that people live their lives. Below you’ll see eight descriptions. For each one shown, please indicate how closely it matches the general way you like to live your life.
The Confirmed Suburbanites group appear to be less active, engaging in various sport and dining events less often. However, gardening is an activity undertaken more often.

**Are more likely to often*...**
- Garden

**Are less likely to often*...**
- Go to the movies, concerts / theatre
- Go to a bar / café / restaurant at night
- Visit a public park or playground
- Visit a public swimming poo
- Visit a museum or art gallery
- Meet with people to participate in an indoor hobby
- Play an indoor sport
- Play an outdoor sport at a special facility
- Play an outdoor sport without special facilities
- Go to the library
- Go to the gym / recreation centre
- Go to bars / cafes / restaurants during the day

*Often refers to at least once a week

Q19. For this next set of questions I'd like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
The top-three activities the Confirmed Suburbanites group would like to participate in were shopping, gardening and playing an outdoor sport without special facilities.

### Frequency of spare time activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>5 or more times a week</th>
<th>2 to 4 times a week</th>
<th>Once a week</th>
<th>Less than once a month</th>
<th>Never</th>
<th>2 to 3 times a month</th>
<th>2 to 3 months</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>4%</td>
<td>26%</td>
<td>37%</td>
<td>11%</td>
<td>9%</td>
<td>6%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Gardening</td>
<td>11%</td>
<td>24%</td>
<td>23%</td>
<td>1%</td>
<td>7%</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Play an outdoor sport without special facilities</td>
<td>12%</td>
<td>23%</td>
<td>12%</td>
<td>7%</td>
<td>15%</td>
<td>14%</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>Visit a public park or playground</td>
<td>5%</td>
<td>14%</td>
<td>16%</td>
<td>15%</td>
<td>18%</td>
<td>25%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Go to a bar / café / restaurant during the day</td>
<td>2%</td>
<td>10%</td>
<td>19%</td>
<td>15%</td>
<td>18%</td>
<td>25%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Go to a gym or recreation centre</td>
<td>3%</td>
<td>11%</td>
<td>5%</td>
<td>4%</td>
<td>21%</td>
<td>51%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Go to a bar / café / restaurant at night</td>
<td>1%</td>
<td>4%</td>
<td>14%</td>
<td>21%</td>
<td>34%</td>
<td>4%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Meet with people for an indoor hobby</td>
<td>5%</td>
<td>12%</td>
<td>5%</td>
<td>10%</td>
<td>25%</td>
<td>42%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Play an outdoor sport at a special facility</td>
<td>8%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
<td>20%</td>
<td>25%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Go to the library</td>
<td>4%</td>
<td>11%</td>
<td>10%</td>
<td>16%</td>
<td>32%</td>
<td>25%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Visit a public swimming pool</td>
<td>5%</td>
<td>9%</td>
<td>6%</td>
<td>10%</td>
<td>33%</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Play an indoor sport</td>
<td>3%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>20%</td>
<td>60%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Go to a sports event as a spectator</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>46%</td>
<td>10%</td>
<td>46%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Visit a museum or art gallery</td>
<td>2%</td>
<td>3%</td>
<td>10%</td>
<td>46%</td>
<td>10%</td>
<td>46%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Go to the movies</td>
<td>2%</td>
<td>6%</td>
<td>16%</td>
<td>46%</td>
<td>10%</td>
<td>46%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Go to a concert or the theatre</td>
<td>5%</td>
<td>3%</td>
<td>12%</td>
<td>56%</td>
<td>21%</td>
<td>25%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = **GREEN**  
Significantly lower than other segments = **RED**

**Q19.** For this next set of questions I’d like you to think about what you do in your spare time. If the facilities were available, how regularly would you like to participate in the following activities?
Key Findings: Housing Expectations
Inner-city dwellers

This group is made up of participants who indicated they already live in the central city.

Confirmed suburbanites, 52%

Keen rebuilders, 6%

Mid-stage movers, 8%

Established movers, 29%

All other segments, n=2,112

Note: base sizes for segments apply to whole chapter unless otherwise stated
Inner-city dwellers – future housing plans: purchasers (ii)

Amongst this group, a third (33%) are planning to purchase a home in Christchurch in the next five years. There is more readiness amongst this group to purchase intensified housing types with a smaller number of bedrooms.

**Plans to purchase home in Christchurch**

- Yes, within next year: 8% (All other segments) vs 2% (Inner-city dwellers)
- Yes, within next 2 years: 9% (All other segments) vs 7% (Inner-city dwellers)
- Yes, within next 3 years: 15% (All other segments) vs 13% (Inner-city dwellers)
- No, not for a while: 10% (All other segments) vs 7% (Inner-city dwellers)
- No plans to do this: 50% (All other segments) vs 60% (Inner-city dwellers)

**Number of bedrooms would expect to purchase**

- 1 bedroom: 13% (All other segments) vs 0% (Inner-city dwellers)
- 2 bedrooms: 4% (All other segments) vs 0% (Inner-city dwellers)
- 3 bedrooms: 14% (All other segments) vs 2% (Inner-city dwellers)
- 4 bedrooms: 15% (All other segments) vs 1% (Inner-city dwellers)
- 5 bedrooms: 3% (All other segments) vs 0% (Inner-city dwellers)
- 6 or more bedrooms: 3% (All other segments) vs 0% (Inner-city dwellers)
- No separate bedrooms: Minorities
- Single room in dwelling: Minorities
- No response: Minorities

**Average numbers of bedrooms expected:** 2.9

(price band for purchasing home in Christchurch)

- Less than $200,001: 3% (All other segments) vs 12% (Inner-city dwellers)
- $200,001 to $300,000: 21% (All other segments) vs 24% (Inner-city dwellers)
- $300,001 to $400,000: 32% (All other segments) vs 31% (Inner-city dwellers)
- $400,001 to $500,000: 18% (All other segments) vs 8% (Inner-city dwellers)
- $500,001 to $600,000: 11% (All other segments) vs 14% (Inner-city dwellers)
- $600,001 to $700,000: 4% (All other segments) vs 5% (Inner-city dwellers)
- $700,001 or more: 5% (All other segments) vs 7% (Inner-city dwellers)
- Don’t know: 5% (All other segments) vs 4% (Inner-city dwellers)
- No response: 1% (All other segments) vs 1% (Inner-city dwellers)

**Average purchase price:** $363,901

Significantly higher than other segments = GREEN  
Significantly lower than other segments = RED

*Base: Those purchasing within the next 5 years – note: small base size, results indicative only

**Q8.** Thinking about your future plans, how likely are you to… purchase and move into a different home for yourself / your family within Christchurch? **Q9a.** What price band would you be looking at to purchase a dwelling? **Q10.** How many bedrooms would you expect / hope this dwelling to have? **Q11.** What type of dwelling would you consider purchasing or renting? Please select all that apply.
Only one-fifth (19%) of Inner-City Dwellers plan to rent another home in Christchurch within the next 5 years. These people are looking for smaller homes than other segments, with nearly half looking for 2 bedrooms and 31% considering a studio apartment.

### Plans to rent home in Christchurch

<table>
<thead>
<tr>
<th></th>
<th>Yes, within next year</th>
<th>Yes, within next 2 years</th>
<th>Yes, within next 3 years</th>
<th>Yes, not for a while</th>
<th>No plans to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments</td>
<td>6%</td>
<td>45%</td>
<td>29%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Inner-city dwellers</td>
<td>8%</td>
<td>8%</td>
<td>69%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### Price band for renting (per week) in Christchurch

- Less than $200: 16%
- $201-$300: 22%
- $301-$400: 32%
- $401-$500: 37%
- Over $501: 10%
- 5%: 5%
- 3%: 3%
- 5%: 2%
- Don’t know: 2%
- No response: 1%

**Average price per week:** $263

- Significantly higher than other segments = GREEN
- Significantly lower than other segments = RED

*Base: Total sample

### Type of dwelling would consider renting

- Stand-alone house: 84%
- Attached house: 26%
- Apartment: 17%
- Flat: 41%
- Mobile home / caravan: 2%
- Micro flat / studio apartment: 31%
- Retirement village / apartment: 1%
- Other type of dwelling: 6%

### Number of bedrooms would expect to rent

- 1 bedroom: 3%
- 2 bedrooms: 29%
- 3 bedrooms: 28%
- 4 bedrooms: 47%
- 5 bedrooms: 17%
- 6 or more bedrooms: 2%

### Average numbers of bedrooms expected:

- All other segments: 1.8
- Inner-city dwellers: 2.8

---

Q8. Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? Q9a. What price band would you be looking at to rent a house (per week)? Q10. How many bedrooms would you expect / hope this dwelling to have? Q11. What type of dwelling would you consider purchasing or renting? Please select all that apply.
Q16. The next question asks you to think about 4 factors to consider when making a decision about buying or renting a dwelling. Imagine you have 10 points to split amongst these factors. The more points you allocate to a certain factor, the more important you consider it to be when making a decision about buying or renting a dwelling.

Interestingly, all the high-level preferences when looking for a new dwelling are almost equally important when making a decision. Slightly ahead of the rest is ‘the neighbourhood’ (3.1); this was similar across all segments.
Dwelling allowing for **pets** is the most important factor for Inner-City Dwellers, followed by **safety** in the neighbourhood at night and **privacy** from neighbours. Across all segments these were the most desired factors when looking for a dwelling.

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the **ONE which is the MOST IMPORTANT** to you, and which is the **LEAST IMPORTANT**.
Inner-city dwellers – detailed preferences for dwellings

Dwelling allowing for pets is the most important factor for Inner-City Dwellers, followed by safety in the neighbourhood at night and privacy from neighbours. Across all segments these were the most desired factors when looking for a dwelling.

Results of MaxDiff trade-off analysis (the more points, the more important)

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Unsurprisingly Inner-City Dwellers are more open to these housing options, although over half (53%) would not like to live in the terraced mews example.

**Q13.** The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Inner-city dwellers – housing preferences (ii)

Compared to the other segments, a higher proportion of Inner-City Dwellers would be prepared to live in this style of housing; however, there is still a large proportion who would not consider it.

**Appeal of walk-up corner housing for ‘Inner-City Dwellers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

- **All other segments (n=2,112)**
  - Mean: 2.6
  - 73% 5-7
  - 20% 8-10
  - 5% No response

- **Inner-city dwellers (n=99)**
  - Mean: 3.6
  - 58% 5-7
  - 30% 8-10
  - 8% No response

Significantly higher than other segments = **GREEN**
Significantly lower than other segments = **RED**

**Appeal of 6-storey housing for ‘Inner-City Dwellers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

- **All other segments (n=2,112)**
  - Mean: 2.6
  - 74% 0-4
  - 18% 5-7
  - 6% 8-10

- **Inner-city dwellers (n=99)**
  - Mean: 3.8
  - 53% 0-4
  - 29% 5-7
  - 14% 8-10

**Q13.** The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Keen Rebuilders

Note: base sizes for segments apply to whole chapter unless otherwise stated

This group is made up of participants who indicated they would consider living in the central city now (within the next two years).

Anti-central city, 52%

Inner-city dwellers, 5%

Keen Rebuilders, 6%

n=109

Mid-Stage Movers, 8%

Established movers, 29%

All other segments, n=2,102
Half of the Keen Rebuilders are looking to purchase a home in the next 5 years. They tend to be looking for smaller number of bedrooms than the average of other segments, and are prepared to purchase more intensified housing.

Q8. Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? Q9a. What price band would you be looking at to purchase a dwelling? Q10. How many bedrooms would you expect / hope this dwelling to have? Q11. What type of dwelling would you consider purchasing or renting? Please select all that apply.
Keen Rebuilders – future housing plans: renters (ii)

Nearly a quarter (24%) of Keen Rebuilders are looking to rent a home in Christchurch in the next five years. Nearly half are looking for a 2-bedroom home.

**Plans to rent home in Christchurch**

- **Yes, within next year**: 16%
- **Yes, next 4-5 years**: 4% (Keen rebuilders) vs 14% (All other segments)
- **Yes, within 2 years**: 14% (Keen rebuilders) vs 32% (All other segments)
- **Yes, within 3 years**: 71% (Keen rebuilders) vs 45% (All other segments)
- **Yes, not for awhile**: 3% (Keen rebuilders) vs 1% (All other segments)
- **No plans to do this**: 14% (Keen rebuilders) vs 29% (All other segments)

**Price band for renting (per week) in Christchurch**

- **Less than $200**: 15%
- **$201-$300**: 45%
- **$301-$400**: 37%
- **$401-$500**: 29%
- **Over $501**: 5%
- **Don’t know**: 4% (Keen rebuilders) vs 3% (All other segments)
- **No response**: 2%

**Average price per week**: $210

Significantly higher than other segments = **GREEN**  
Significantly lower than other segments = **RED**

*Base: Those renting within the next 5 years – note small base size, results indicative only

Q8. Thinking about your future plans, how likely are you to… purchase and move into a different home for yourself / your family within Christchurch?  
**Q9a.** What price band would you be looking at to rent a house (per week)?  
**Q10.** How many bedrooms would you expect / hope this dwelling to have?  
**Q11.** What type of dwelling would you consider purchasing or renting? Please select all that apply.
Keen Rebuilders – high-level preferences in dwelling factors

For Keen Rebuilders the neighbourhood is the most important consideration for a dwelling (3.3), but this is closely followed by the other three factors of layout (2.4), property surroundings (2.2) and quality of dwelling (2.1).

Q16. The next question asks you to think about 4 factors to consider when making a decision about buying or renting a dwelling. Imagine you have 10 points to split up amongst these factors. The more points you allocate to a certain factor, the more important you consider it to be when making a decision about buying or renting a dwelling.
Keen Rebuilders – detailed preferences for dwellings

As with other segments, privacy, pets and safety at night are most important to Keen Rebuilders. Also important for Keen Rebuilders is for dwellings to be within walking distance to services and to be in mixed housing zones (where residential development is included or is adjacent to other activities).

The larger the size of the box, the more importance is placed on it. Full headings shown in appendix.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Dwelling features</th>
<th>Neighbourhood</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privacy</td>
<td>Pets allowed</td>
<td>Feel safe</td>
<td>Development</td>
</tr>
<tr>
<td></td>
<td>Open plan</td>
<td></td>
<td>Low maintenance</td>
</tr>
<tr>
<td>Car parking</td>
<td>'green'</td>
<td>Walking distance</td>
<td>Quiet streets</td>
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<tr>
<td></td>
<td>Sheltered</td>
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<td>F...</td>
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<td></td>
<td>Storage</td>
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<tr>
<td></td>
<td>Good views</td>
<td></td>
<td>Garden</td>
</tr>
<tr>
<td></td>
<td>Public transpor</td>
<td></td>
<td>Neighbours</td>
</tr>
<tr>
<td>Single level</td>
<td>Variety</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Keen Rebuilders – detailed preferences for dwellings

As with other segments, privacy, pets and safety at night are most important to Keen Rebuilders. Also important for Keen Rebuilders is for dwellings to be within walking distance to services and to be in mixed housing zones (where residential development is included or is adjacent to other activities).

Results of MaxDiff trade-off analysis (the more points, the more important)

Points
14.3
13.1
6.7
4.8
4.5
2.9
2.5
1.9
1.7
1.0
0.5
0.1

- Privacy by minimising views & noise between neighbours
- Feel safe when walking around the neighbourhood at night
- Car parking attached to the dwelling
- Residential development that also includes or is adjacent to other activities
- Sunny & sheltered aspect
- Buildings set back or located away from busy streets
- A short commute to work, childcare or places of education
- In desired school zones
- Single-level dwelling or minimal use of stairs
- Good views
- Has shared facilities such as BBQ areas, swimming pools, gyms
- Shared entrances or outdoor spaces that encourage interaction with neighbours

Points
14.1
8.5
5.5
4.7
4.1
2.9
2.3
1.7
1.3
0.5
0.3
0.1

- Dwelling allows for a cat or dog
- Within walking distance to services such as shops, banks, doctors
- Open-plan living with good indoor / outdoor flow
- A small private garden, courtyard or outdoor area
- Low-maintenance building & landscaping
- Building has ‘green’ features
- Good access to public transport
- Close to parks, recreation areas or leisure facilities
- Adequate secure storage for large items such as recreational gear
- A neighbourhood with a wide variety of people & households
- Community gardens, vegetable & flower beds

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

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Keen Rebuilders – housing preferences (i)

A higher proportion of Keen Rebuilders find these housing propositions appealing, particularly the detached laneway example.

**Appeal of detached laneway housing for ‘Keen Rebuilders’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

- 0-4
- 5-7
- 8-10
- No response
- Mean

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments</td>
<td>45%</td>
<td>40%</td>
<td>13%</td>
<td>4.4</td>
<td></td>
</tr>
<tr>
<td>Keen rebuilders</td>
<td>22%</td>
<td>42%</td>
<td>35%</td>
<td>6.4</td>
<td></td>
</tr>
</tbody>
</table>

*Significantly higher than other segments = GREEN
Significantly lower than other segments = RED*

**Appeal of terraced mews and green housing for ‘Keen Rebuilders’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

- 0-4
- 5-7
- 8-10
- No response

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments</td>
<td>69%</td>
<td>23%</td>
<td>6%</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Keen rebuilders</td>
<td>38%</td>
<td>47%</td>
<td>15%</td>
<td>5.1</td>
<td></td>
</tr>
</tbody>
</table>

*Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.*
Keen Rebuilders – housing preferences (ii)

Once again, stronger desire from Keen Rebuilders for this type of housing. However, it is still only a small proportion that these housing types appeal to – only 1 in 10 would consider the 6-storey housing option.

**Appeal of walk-up corner housing for ‘Keen Rebuilders’**

*Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?*

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,102)</td>
<td>75%</td>
<td>19%</td>
<td>4%</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>Keen rebuilders (n=109)</td>
<td>41%</td>
<td>43%</td>
<td>15%</td>
<td>4.7</td>
<td></td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of 6-storey housing for ‘Keen Rebuilders’**

*Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?*

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,102)</td>
<td>74%</td>
<td>18%</td>
<td>7%</td>
<td>2.6</td>
<td></td>
</tr>
<tr>
<td>Keen rebuilders (n=109)</td>
<td>52%</td>
<td>36%</td>
<td>12%</td>
<td>4.4</td>
<td></td>
</tr>
</tbody>
</table>

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Mid-Stage Movers

- Keen Rebuilders, 6%
- Inner-city dwellers, 5%
- Confirmed Suburbanites, 52%
- Established Movers, 29%
- All other segments, n=2,045

Note: base sizes for segments apply to whole chapter unless otherwise stated.
Over half (55%) are planning to purchase a home within the next 5 years. Mid-Stage Movers are prepared to consider more intensified housing such as attached houses, apartments and flats more so than other segments.

**Plans to purchase home in Christchurch**

- **Yes, within next year**: 10% (Mid-stage movers: 8%)
- **Yes, within next 2 years**: 8% (Mid-stage movers: 8%)
- **Yes, within next 3 years**: 14% (Mid-stage movers: 14%)
- **Yes, not for a while**: 23% (Mid-stage movers: 23%)
- **No plans to do this**: 9% (Mid-stage movers: 9%)
- **No response**: 2% (Mid-stage movers: 2%)

**Price band for purchasing home in Christchurch**

- **Less than $200,000**: 3%
- **$200,001 to $300,000**: 27%
- **$300,001 to $400,000**: 32%
- **$400,001 to $500,000**: 18%
- **$500,001 to $600,000**: 13%
- **$600,001 to $700,000**: 10%
- **$700,001 or more**: 4%
- **Don't know**: 5%
- **No response**: 5%

**Average purchase price**: $384,625

- **59% Look to spend $200k - $400k**

**Number of bedrooms would expect to purchase**

- **1 bedroom**: 1%
- **2 bedrooms**: 13%
- **3 bedrooms**: 15%
- **4 bedrooms**: 34%
- **5 bedrooms**: 32%
- **6 or more bedrooms**: 3%
- **No separate bedrooms**: 1%
- **Single room in dwelling**: 3%
- **No response**: 2%

**Average numbers of bedrooms expected**: 3.1

**Q8.** Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? **Q9a.** What price band would you be looking at to purchase a dwelling? **Q10.** How many bedrooms would you expect / hope this dwelling to have? **Q11.** What type of dwelling would you consider purchasing or renting? Please select all that apply.
Mid-Stage Movers – future housing plans: renters (ii)

Just over a quarter (28%) of Mid-Stage Movers are looking to rent within the next five years. Amongst these people, a third would consider an apartment and nearly half would consider an attached house or a flat.

Plans to rent home in Christchurch

- **Yes, within next year**
- **Yes, within next 2 years**
- **Yes, within next 3 years**
- **Yes, not for a while**
- **No plans to do this**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Yes, within next year</th>
<th>Yes, within next 2 years</th>
<th>Yes, within next 3 years</th>
<th>Yes, not for a while</th>
<th>No plans to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,045)</td>
<td>6%</td>
<td>1%</td>
<td>1%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Mid-stage movers (n=166)</td>
<td>11%</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: Total sample

Price band for renting (per week) in Christchurch

<table>
<thead>
<tr>
<th>Price Band</th>
<th>Less than $200</th>
<th>$201-$300</th>
<th>$301-$400</th>
<th>$401-$500</th>
<th>Over $501</th>
<th>Don’t know</th>
<th>No response</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td>35%</td>
<td>27%</td>
<td>35%</td>
<td>5%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Average price per week: $263

Significantly higher than other segments = GREEN  
Significantly lower than other segments = RED  
*Base: Those renting within the next 5 years

Q8. Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? 

Q9a. What price band would you be looking at to rent a house (per week)? 

Q10. How many bedrooms would you expect / hope this dwelling to have? 

Q11. What type of dwelling would you consider purchasing or renting? Please select all that apply.
The Mid-Stage Movers place more emphasis on layout (2.5) and less on the neighbourhood (3.0) than the other segments (2.3 & 3.2 respectively). However, the neighbourhood is still the most important aspect overall.

Q16. The next question asks you to think about 4 factors to consider when making a decision about buying or renting a dwelling. Imagine you have 10 points to split up amongst these factors. The more points you allocate to a certain factor, the more important you consider it to be when making a decision about buying or renting a dwelling.
Mid-Stage Movers – detailed preferences for dwellings

Once again, privacy, safety and pets are the key concerns for a dwelling; however, also important to this group is that the building has green features, living is open plan with indoor/outdoor flow and there is car parking attached to the dwelling.

The larger the size of the box, the more importance is placed on it. Full headings shown in appendix.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Dwelling features</th>
<th>Neighbourhood</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pets allowed</td>
<td>Open plan</td>
<td>Car parking</td>
<td>Feel safe</td>
</tr>
<tr>
<td>Privacy</td>
<td>Outdoor area</td>
<td>Single level</td>
<td>Walking distance</td>
</tr>
<tr>
<td>'green'</td>
<td>Sheltered</td>
<td>St...</td>
<td>School zone</td>
</tr>
<tr>
<td>Good...</td>
<td>Good views</td>
<td>Storage</td>
<td>Public transpor</td>
</tr>
<tr>
<td>Low maintenance</td>
<td>Quiet streets</td>
<td>Development</td>
<td>Low maintenance</td>
</tr>
<tr>
<td>Gardens</td>
<td>Facilities</td>
<td>Neighbours</td>
<td>Neighbours</td>
</tr>
<tr>
<td>Neighbours</td>
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<td>Storage</td>
<td>Public transpor</td>
</tr>
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</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

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Once again, privacy, safety and pets are the key concerns for a dwelling; however, also important to this group is that the building has green features, living is open plan with indoor/outdoor flow and there is car parking attached to the dwelling.

**Results of MaxDiff trade-off analysis (the more points, the more important)**

<table>
<thead>
<tr>
<th>Points</th>
<th>Feels safe when walking around the neighbourhood at night</th>
<th>Privacy by minimizing views &amp; noise between neighbours</th>
<th>Open-plan living with good indoor/outdoor flow</th>
<th>A small private garden, courtyard or outdoor area</th>
<th>Single-level dwelling or minimal use of stairs</th>
<th>Buildings set back or located away from busy streets</th>
<th>Residential development that also includes or is adjacent to other activities</th>
<th>A short commute to work, childcare or places of education</th>
<th>Good views</th>
<th>Has shared facilities such as BBQ areas, swimming pools, gyms</th>
<th>Shared entrances or outdoor spaces that encourage interaction with neighbours</th>
<th>A neighbourhood with a wide variety of people &amp; households</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.1</td>
<td>12.5</td>
<td>12.6</td>
<td>6.2</td>
<td>5.9</td>
<td>5</td>
<td>3.8</td>
<td>4.9</td>
<td>5.7</td>
<td>4.6</td>
<td>4.2</td>
<td>3.6</td>
<td>4.1</td>
</tr>
<tr>
<td>10.3</td>
<td>Dwelling allows for a cat or dog</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>7.3</td>
<td>Building has ‘green’ features</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>6.6</td>
<td>Car parking attached to the dwelling</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>4.6</td>
<td>Within walking distance to services such as shops, banks, doctors</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.4</td>
<td>Sunny &amp; sheltered aspect</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.6</td>
<td>In desired school zones</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.5</td>
<td>Low-maintenance building &amp; landscaping</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.7</td>
<td>Close to parks, recreation areas or leisure facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Good access to public transport</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.0</td>
<td>Community gardens, vegetable &amp; flower beds</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>0.8</td>
<td>Adequate secure storage for large items such as recreational gear</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Q17.** Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Detached laneway housing was appealing to one in five of the Mid-Stage Movers, and the terraced mews were appealing to 14%; both of these are higher proportions when compared to the other segments.

**Appeal of detached laneway housing for ‘Mid-Stage Movers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this — when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,045)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mid-stage movers (n=166)</td>
<td>27%</td>
<td>52%</td>
<td></td>
<td>21%</td>
<td>5.7</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of terraced mews and green housing for ‘Mid-Stage Movers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this — when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,045)</td>
<td>70%</td>
<td>23%</td>
<td>6%</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Mid-stage movers (n=166)</td>
<td>40%</td>
<td>45%</td>
<td></td>
<td>14%</td>
<td>5</td>
</tr>
</tbody>
</table>

Base: Total sample

87

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
While a higher proportion of Mid-Stage Movers find these housing options appealing, over half do not find these appealing at all.

**Appeal of walk-up corner housing for ‘Mid-Stage Movers’**
Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,045)</td>
<td>19%</td>
<td>74%</td>
<td>4%</td>
<td>1%</td>
<td>2.5</td>
</tr>
<tr>
<td>Mid-stage movers (n=166)</td>
<td>33%</td>
<td>53%</td>
<td>13%</td>
<td>13%</td>
<td>4.2</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of 6-storey housing for ‘Mid-Stage Movers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=2,045)</td>
<td>18%</td>
<td>6%</td>
<td>74%</td>
<td>18%</td>
<td>2.5</td>
</tr>
<tr>
<td>Mid-stage movers (n=166)</td>
<td>26%</td>
<td>54%</td>
<td>18%</td>
<td>13%</td>
<td>4.3</td>
</tr>
</tbody>
</table>

Base: Total sample

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Established Movers

Note: base sizes for segments apply to whole chapter unless otherwise stated

- **Confirmed Suburbanites, 52%**
- **Inner-city dwellers, 5%**
- **Keen Rebuilders, 6%**
- **Mid-Stage Movers, 8%**
- **Established Movers, 29%** n=622

This group is made up of participants who indicated they would consider living in the central city once the new central city has taken shape (5-10 years).

All other segments, n=1,589
Established Movers – future housing plans: purchasers (ii)

Less than half had no plans to purchase a home in Christchurch, with significantly more than all other groups saying they would do this in the next 4-5 years. The majority of those who did said they would consider purchasing a stand-alone house.

 Plans to purchase home in Christchurch

- Yes, within next year
- Yes, within next 2 years
- Yes, within next 3 years
- Yes, next 4-5 years
- Yes, not for a while
- No plans to do this

All other segments (n=1,589)
- 8% Yes, within next year
- 8% Yes, within next 2 years
- 7% Yes, within next 3 years
- 13% Yes, next 4-5 years
- 9% Yes, not for a while
- 52% No plans to do this

Mid-stage movers (n=622)
- 7% Yes, within next year
- 10% Yes, within next 2 years
- 7% Yes, within next 3 years
- 17% Yes, next 4-5 years
- 12% Yes, not for a while
- 46% No plans to do this

Number of bedrooms would expect to purchase

- 1 bed
- 2 beds
- 3 beds
- 4 beds
- 5 beds
- 6 or more beds
- No separate bedrooms
- Single room in dwelling
- No response

Average numbers of bedrooms expected: 3.2

Price band for purchasing home in Christchurch

- Less than $200,000
- $200,001 to $300,000
- $300,001 to $400,000
- $400,001 to $500,000
- $500,001 to $600,000
- $600,001 to $700,000
- $700,001 or more
- Don't know
- No response

52% Look to spend $200k - $400k

Average purchase price: $413,130

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q8. Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? Q9a. What price band would you be looking at to purchase a dwelling? Q10. How many bedrooms would you expect / hope this dwelling to have? Q11. What type of dwelling would you consider purchasing or renting? Please select all that apply.
Established Movers – future housing plans: renters (ii)

Nearly three-quarters said they had no plans to rent in Christchurch. Over half (51%) would like to rent in 3 bedroom homes.

Plans to rent home in Christchurch

- Yes, within next year: 16%
- Yes, within next 2 years: 69%
- No plans to do this: 16%

Base: Total sample

Price band for renting (per week) in Christchurch

- Less than $200: 19%
- $201-$300: 30%
- $301-$400: 34%
- $401-$500: 40%
- Over $501: 5%
- Don’t know: 3%
- No response: 3%

Average price per week: $255

Type of dwelling would consider renting

- Stand-alone house: 84%
- Attached house: 20%
- Apartment: 10%
- Flat: 3%
- Mobile home / caravan: 2%
- Micro flat / studio apartment: 5%
- Retirement village / apartment: 2%
- Other type of dwelling: 1%
- No response: 2%

Number of bedrooms would expect to rent

- 1 bedroom: 5%
- 2 bedrooms: 32%
- 3 bedrooms: 37%
- 4 bedrooms: 91%
- 5 bedrooms: 3%
- 6 or more bedrooms: 1%
- No separate bedrooms: 1%
- Single room in dwelling: 1%
- No response: 1%

Average numbers of bedrooms expected: 2.8

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q8. Thinking about your future plans, how likely are you... purchase and move into a different home for yourself / your family within Christchurch? Q9a. What price band would you be looking at to rent a house (per week)? Q10. How many bedrooms would you expect / hope this dwelling to have? Q11. What type of dwelling would you consider purchasing or renting? Please select all that apply.
Established Movers – high-level preferences in dwelling factors

For Established Movers the layout of the dwelling shows more relative importance and the neighbourhood less when compared against all other groups.

Established Movers (n=622) vs. All other segments (n=1,589)

- **Layout of dwelling**: Established Movers (2.4) vs. All other segments (2.3)
- **Quality of dwelling**: Established Movers (2.3) vs. All other segments (2.2)
- **Property surroundings**: Established Movers (2.3) vs. All other segments (2.3)
- **The neighbourhood**: Established Movers (3.1) vs. All other segments (3.2)

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Q16.** The next question asks you to think about 4 factors to consider when making a decision about buying or renting a dwelling. Imagine you have 10 points to split up amongst these factors. The more points you allocate to a certain factor, the more important you consider it to be when making a decision about buying or renting a dwelling.
Established Movers – detailed preferences for dwellings

Despite ranking the neighbourhood lower than all other groups at a higher level, when looking at a multitude of feature the most important feature for Established Movers is feeling safe in their neighbourhood at night. Privacy, having a dwelling which allows for cats and dogs, and ‘green’ features were also ranked as important.

The larger the size of the box, the more importance is placed on it. Full headings shown in appendix.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Dwelling features</th>
<th>Neighbourhood</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privacy</td>
<td>‘green’</td>
<td>Open plan</td>
<td>Quiet streets</td>
</tr>
<tr>
<td>Pets allowed</td>
<td>Car park</td>
<td>Outdoor area</td>
<td>Low mainte...</td>
</tr>
<tr>
<td>Sheltered</td>
<td>Single level</td>
<td>Feel safe</td>
<td>Development</td>
</tr>
<tr>
<td>Good views</td>
<td>Storage</td>
<td>Walking distance</td>
<td>Facilities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School zone</td>
<td>Gardens</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public transpor</td>
<td>Neighbours</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Established Movers – detailed preferences for dwellings

Despite ranking the neighbourhood lower than all other groups at a higher level, when looking at a multitude of features the most important feature for Established Movers is feeling safe in their neighbourhood at night. Privacy, having a dwelling which allows for cats and dogs, and ‘green’ features were also ranked as important.

Results of MaxDiff trade-off analysis (the more points, the more important)

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Established Movers – housing preferences (i)

Both the detached laneway housing and the terrace mews and green housing options were seen as significantly more favourable than for all other groups. The detached laneway housing showed the most favour on average from the Established Movers.

**Appeal of detached laneway housing for ‘Established Movers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th>Score</th>
<th>Established Movers (n=622)</th>
<th>All other segments (n=1,589)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>27%</td>
<td>51%</td>
</tr>
<tr>
<td>5-7</td>
<td>55%</td>
<td>34%</td>
</tr>
<tr>
<td>8-10</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>No response</td>
<td>13%</td>
<td>4</td>
</tr>
<tr>
<td>Mean</td>
<td>5.6</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: Total sample

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of terraced mews and green housing for ‘Established Movers’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th>Score</th>
<th>Established Movers (n=622)</th>
<th>All other segments (n=1,589)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>56%</td>
<td>72%</td>
</tr>
<tr>
<td>5-7</td>
<td>35%</td>
<td>21%</td>
</tr>
<tr>
<td>8-10</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>No response</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Mean</td>
<td>4.1</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Base: Total sample

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Established Movers – housing preferences (ii)

Around three-fifths of the Established Movers found the walk-up corner housing and the 6-storey housing not at all appealing; however, these options were seen as generally more appealing by this group compared to all other segments. The Established Movers show a preference for houses over apartments.

**Appeal of walk-up corner housing for ‘Established Movers’**  
Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,589)</td>
<td>16%</td>
<td>77%</td>
<td>4%</td>
<td>2.3</td>
<td></td>
</tr>
<tr>
<td>Established movers (n=622)</td>
<td>31%</td>
<td>62%</td>
<td>7%</td>
<td>3.5</td>
<td></td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of 6-storey housing for ‘Established Movers’**  
Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,589)</td>
<td>78%</td>
<td>14%</td>
<td>5%</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td>Established movers (n=622)</td>
<td>59%</td>
<td>30%</td>
<td>11%</td>
<td>3.8</td>
<td></td>
</tr>
</tbody>
</table>

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Confirmed Suburbanites

- Established movers, 29%
- Mid-stage movers, 8%
- Keen rebuilders, 6%
- Inner-city dwellers, 5%

All other segments, n=1,009

Confirmed Suburbanites, 52% n=1,202

This group is made up of participants who indicated they would not consider living in the central city.

Note: base sizes for segments apply to whole chapter unless otherwise stated
Just over half of the Confirmed Suburbanites group have no plans to purchase a house in Christchurch, which is significantly higher than all other segments. Reflecting the current dwelling they are likely to live in, nearly all would consider purchasing a stand-alone house.

**Plans to purchase home in Christchurch**

- **Yes, within next year**: 8%
- **Yes, within next 2 years**: 11%
- **Yes, within next 3 years**: 8%
- **Yes, not for a while**: 16%
- **No plans to do this**: 45%

**Type of dwelling would consider purchasing**

- **Stand-alone house**: 84%
- **Attached house**: 24%
- **Apartment**: 14%
- **Flat**: 13%
- **Mobile home / caravan**: 4%
- **Micro flat / studio apartment**: 1%
- **Retirement village / apartment**: 1%
- **Other type of dwelling**: 1%
- **No response**: 5%

**Number of bedrooms would expect to purchase**

- **All other segments (n=426*)**
  - 1 bedroom: 20%
  - 2 bedrooms: 16%
  - 3 bedrooms: 49%
  - 4 bedrooms: 22%
  - 5 bedrooms: 3%
  - 6 or more bedrooms: 1%
  - No separate bedrooms: 1%
  - No response: 2%

- **Confirmed Suburbanites (n=367*)**
  - 1 bedroom: 22%
  - 2 bedrooms: 12%
  - 3 bedrooms: 42%
  - 4 bedrooms: 27%
  - 5 bedrooms: 3%
  - 6 or more bedrooms: 1%
  - Single room in dwelling: 2%
  - No response: 3%

**Average numbers of bedrooms expected:**

- **All other segments**: 3.4
- **Confirmed Suburbanites**: 3.1 rooms

**Price band for purchasing home in Christchurch**

- **Less than $200,000**: 14%
- **$200,001 to $300,000**: 34%
- **$300,001 to $400,000**: 14%
- **$400,001 to $500,000**: 22%
- **$500,001 to $600,000**: 12%
- **$600,001 to $700,000**: 4%
- **$700,001 or more**: 4%
- **Don’t know**: 5%
- **No response**: 5%

**Average purchase price**: $399,580

**Q8.** Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? **Q9a.** What price band would you be looking at to purchase a dwelling? **Q10.** How many bedrooms would you expect / hope this dwelling to have? **Q11.** What type of dwelling would you consider purchasing or renting? Please select all that apply.

*Base: Those purchasing within the next 5 years

*Note: Significantly higher than other segments = GREEN * Significantly lower than other segments = RED *Numbers may not add up to the total as some respondents did not answer.
Confirmed Suburbanites – future housing plans: renters (ii)

Nearly three-quarters have no plans to rent in Christchurch; however, those who do expect a rental with significantly more rooms than the other segments.

**Plans to rent home in Christchurch**

- **Yes, within next year**: 9% for all other segments, 4% for anti-central city.
- **Yes, within next 2 years**: 7% for all other segments, 2% for anti-central city.
- **Yes, within next 3 years**: 67% for all other segments, 73% for anti-central city.
- **Yes, not for a while**: 12% for all other segments, 16% for anti-central city.
- **No plans to do this**: 2% for all other segments, 2% for anti-central city.

**Price band for renting (per week) in Christchurch**

- **Less than $200**: 19% for all other segments, 10% for anti-central city.
- **$201-$300**: 35% for all other segments, 31% for anti-central city.
- **$301-$400**: 35% for all other segments, 38% for anti-central city.
- **$401-$500**: 5% for all other segments, 5% for anti-central city.
- **Over $501**: 3% for all other segments, 3% for anti-central city.
- **Don't know**: 9% for all other segments, 0% for anti-central city.
- **No response**: 3% for all other segments, 4% for anti-central city.

*Base: Total sample*

**Average price per week: $270**

- **Significantly higher than other segments = GREEN**
- **Significantly lower than other segments = RED**

**Type of dwelling would consider renting**

- Stand-alone house: 79% for all other segments, 91% for anti-central city.
- Attached house: 33% for all other segments, 18% for anti-central city.
- Apartment: 27% for all other segments, 2% for anti-central city.
- Flat: 38% for all other segments, 12% for anti-central city.
- Mobile home / caravan: 2% for all other segments, 2% for anti-central city.
- Micro flat / studio apartment: 13% for all other segments, 3% for anti-central city.
- Retirement village / apartment: 1% for all other segments, 1% for anti-central city.
- Other type of dwelling: 1% for all other segments, 2% for anti-central city.
- No response: 1% for all other segments, 2% for anti-central city.

**Number of bedrooms would expect to rent**

- 1 bedroom: 7% for all other segments, 24% for confirmed suburbanites.
- 2 bedrooms: 32% for all other segments, 39% for confirmed suburbanites.
- 3 bedrooms: 47% for all other segments, 47% for confirmed suburbanites.
- 4 bedrooms: 14% for all other segments, 20% for confirmed suburbanites.
- 5 bedrooms: 3% for all other segments, 3% for confirmed suburbanites.
- 6 or more bedrooms: 2% for all other segments, 3% for confirmed suburbanites.
- No separate bedrooms: 6% for all other segments, 4% for confirmed suburbanites.
- Single room in dwelling: 4% for all other segments, 2% for confirmed suburbanites.
- No response: 2% for all other segments, 2% for confirmed suburbanites.

Average numbers of bedrooms expected: 2.9

(All other segments: 2.6 rooms)

---

**Q8.** Thinking about your future plans, how likely are you to... purchase and move into a different home for yourself / your family within Christchurch? **Q9a.** What price band would you be looking at to rent a house (per week)? **Q10.** How many bedrooms would you expect / hope this dwelling to have? **Q11.** What type of dwelling would you consider purchasing or renting? Please select all that apply.
Confirmed Suburbanites – high-level preferences in dwelling factors

The Confirmed Suburbanites find the **neighbourhood** the most important aspect of the dwelling (3.3). The group is, however, less likely to find the layout of the dwelling important when compared to the other segments.

Q16. The next question asks you to think about 4 factors to consider when making a decision about buying or renting a dwelling. Imagine you have 10 points to split up amongst these factors. The **more points you allocate** to a certain factor, the **more important** you consider it to be when making a decision about buying or renting a dwelling.
Confirmed Suburbanites – detailed preferences for dwellings

Consistent with the other groups, Confirmed Suburbanites find safety, having a dwelling that allows for cats and dogs, and privacy the top-three most important factors when deciding on a dwelling. The group is, however, more likely to find having a single-level dwelling or minimal use of stairs important compared to the other segments.

The larger the size of the box, the more importance is placed on it. Full headings shown in appendix.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Dwelling features</th>
<th>Neighbourhood</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pets allowed</td>
<td>Single level</td>
<td>Feel safe</td>
<td>Quiet streets</td>
</tr>
<tr>
<td>Privacy</td>
<td>Open plan</td>
<td>Walking distance</td>
<td>Low maintenance</td>
</tr>
<tr>
<td></td>
<td>Car parking</td>
<td>School zone</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Outdoor area</td>
<td>Public transpor</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sheltered</td>
<td>Park...</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Storage</td>
<td>Sho...</td>
<td></td>
</tr>
<tr>
<td></td>
<td>G...</td>
<td>Variety</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Development</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gardens</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Facilities</td>
<td></td>
</tr>
<tr>
<td>Good views</td>
<td></td>
<td>Neighbours</td>
<td></td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Confirmed Suburbanites – detailed preferences for dwellings

Consistent with the other groups, Confirmed Suburbanites find safety, having a dwelling that allows for cats and dogs, and privacy the top-three most important factors when deciding on a dwelling. The group is, however, more likely to find having a single-level dwelling or minimal use of stairs important compared to the other segments.

MaxDiff analysis

Q17. Next I’d like to ask you some questions about how important various factors are to you when deciding on buying or renting a dwelling. This process will identify which factors are most important to you. There are two different sets of questions which cover topics about the neighbourhood, the property and the dwelling. There are about 18 questions in total, each question asks you to consider 4 factors at a time. We’ll let you know when you have made it half way through. For each group of factors, please select the ONE which is the MOST IMPORTANT to you, and which is the LEAST IMPORTANT.
Over half of the Confirmed Suburbanites group report finding the detached laneway house not at all appealing, and over three-quarters report finding the terraced mews and green housing not at all appealing. Although the majority of the Confirmed Suburbanites group report never wanting to live in any of the dwelling options, the detached laneway was the most popular.

**Appeal of detached laneway housing for ‘Confirmed Suburbanites’**

*Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?*

<table>
<thead>
<tr>
<th>Segment</th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,009)</td>
<td>26%</td>
<td>52%</td>
<td></td>
<td>21%</td>
<td>5.7</td>
</tr>
<tr>
<td>Anti-central city (n=1,202)</td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of terraced mews and green housing for ‘Confirmed Suburbanites’**

*Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?*

<table>
<thead>
<tr>
<th>Segment</th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,009)</td>
<td>51%</td>
<td>37%</td>
<td></td>
<td>11%</td>
<td>4.4</td>
</tr>
<tr>
<td>Anti-central city (n=1,202)</td>
<td></td>
<td></td>
<td></td>
<td>13%</td>
<td>2</td>
</tr>
</tbody>
</table>

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
As with the previous dwelling options, the majority of the Confirmed Suburbanites group would not consider living in any of the options.

**Appeal of walk-up corner housing for ‘Confirmed Suburbanites’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,009)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.8</td>
</tr>
<tr>
<td>Anti-central city (n=1,202)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.6</td>
</tr>
</tbody>
</table>

Significantly higher than other segments = GREEN
Significantly lower than other segments = RED

**Appeal of 6-storey housing for ‘Confirmed Suburbanites’**

Where 0 is I would NEVER want to live in a place like this and 10 is I would love to live in a place like this – when can I move in?

<table>
<thead>
<tr>
<th></th>
<th>0-4</th>
<th>5-7</th>
<th>8-10</th>
<th>No response</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>All other segments (n=1,009)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.9</td>
</tr>
<tr>
<td>Anti-central city (n=1,202)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.5</td>
</tr>
</tbody>
</table>

Q13. The types of houses that could be built in the new central Christchurch area could vary a lot. Next I’m going to show you some pictures of different types of houses and housing developments. For each one you see, please tell me how much you think you might like to live in it if you were to live in the central city of Christchurch sometime.
Recommendations
It’s difficult to expect New Zealanders to give up their preferences for a ‘patch of grass’ and a feeling of being in a traditional detached house that they have control over

- All the segments strongly preferred stand-alone houses, whether renting or buying.
- People want the ability to have pets, privacy, and safety at night.
- Of the four housing concepts shown, the one closest to the traditional New Zealand house was clearly preferred (the Detached Laneway).
- People want to feel a sense of belonging – to feel a welcomed part of a safe, comfortable community of friends and friendly neighbours.
  - Fear of inner-city developments being poorly managed or becoming high-density ‘urban slums’ was apparent, especially when respondents referred to ‘shoebox’ developments in Auckland.
  - Well-designed Body Corporates could help with this and should be actively used by developers and Council alike to ensure long-term attractiveness and to allay potential residents’ fears.
- Promotions centering on the vitality, fun and fashion of central city living should not over-shadow the core human desire to be able to “safely walk back to your home at night to be with your family and pets in peace.”
The Segments in Summary: what do they want?

**Younger people without kids / older empty nesters** already living the inner city lifestyle with smaller, rented residences and more socialising ‘out and about’.
A third looking to buy:
• 2.9 bedrooms on average.
• Stand alone house most preferred (87%), but still more likely than other segments to consider flats / apartments / attached houses.
• Detached laneway house preferred option (21%).
Some 55% looking to spend $200k - $400k

**Keen Rebuilders**, 6% Keen to move in now (within next 2 years)

**Mid-Stage Movers**, 8%
Will move in the next 3-5 years

**Established Movers**, 29%
Will move in the next 5-10 years

**More established households**, typically with older children or children left home.
Lower home ownership rates but 55% looking to buy
• $384k, 3.1 bedrooms.
• Stand alone house most preferred (78%), but still quite likely to consider flats / apartments / attached houses.
• Detached laneway house preferred option (21%).
Some 55% looking to spend $200k - $400k

**More established, wealthier households**, typically with children or children left home. Sporty, healthy and active.
Higher home ownership rates, less affected by quakes, only 24% looking to buy
• $413k, 3.2 bedrooms.
• Stand alone house most preferred, esp. with green design features.
• Detached laneway house preferred option (18%).
Some 52% looking to spend $200k - $400k

Younger people without kids / students & professionals happy to live the inner city lifestyle with smaller, rented residences and more socialising ‘out and about’. Typically renters; more transient, already less likely to be in standalone houses.
Around half looking to buy:
• $371k, 2.8 bedrooms.
• Stand alone house most preferred (77%), but still quite likely to consider flats / apartments / attached houses.
• Detached laneway house preferred option (35%).
Some 58% looking to spend $200k - $400k
10-14% of Chch residents would consider moving into the central city, but most want others to establish it first and standalone houses are still preferred.

- Around half the Christchurch population is not interested in living in the inner city as they prefer their more established, leafier suburban neighbourhoods and communities.
  - Which means that half the population would consider central city living.
  - Yet 60% of these people would rather wait until others have moved in first and got things established.

- The proportion of people willing to consider moving in within the next few years, is 10-14%.
  - Around half are looking to buy – and they prefer 3 bedroom standalone houses.
  - Renters also prefer standalone houses.
  - Few have a realistic understanding or purchase or rental costs.
  - If cheaper, the detached laneway option could work too.
  - They tend to be young flatters and young professionals / older empty nesters.
  - Central city living has to accommodate pets, but children are not expected.
  - Houses have to be within walking distance of all the special amenities that central city living promises (sporting and healthy outdoors activities as well as bars, theatres, cafes etc)
The challenges are significant but Council legislative powers should be able to overcome them

1. People are reluctant to be the first to move in – it’s risky, less homely, and living in a building site.
   - Incentives need to be considered, for developers, residents and would-be local businesses.
   - Marketing could also help build attraction – the 5th ship?

2. People want their cake and to eat it too – suburban comforts with inner-city vitality and convenience.
   - Design has to account for this – e.g. town houses rather than apartments?

3. Purchases are most likely to be made by empty nesters and young professionals, rentals by students.
   - These groups have different lifestyles to be accommodated for!

4. The pet issue will need careful management and cannot be ignored.
Conclusions and Recommendations

- There is clearly a solid, encouraging level of interest in moving back to the rebuilt central city.

- Yet there is a natural tension between an interest in considering a move to the central city and a desire to wait until development has progressed to a point at which people can see that the planned rebuild is succeeding.
  - This means that the earliest developments will better suit childless professionals (renting and buying) who are prepared to ‘take a risk’. Those with children want more assurance that they will be moving into a safe, established neighbourhood and not a building site. Developers should build with segments in mind, dictated to some extent by the planned dates of occupancy.

- The reasons why confirmed suburbanites want to stay where they are echo the preferences that people cite when considering a central city lifestyle (i.e. most people want the same thing regardless of where they live), which is a desire for a nice neighbourhood, privacy, safety, pets, and some outdoor green space, preferably through having a detached house.
  - This means that developers will have to build complexes that deliver these attributes as much as possible. Granted it appears that people ‘want their cake and to eat it to’ in regards to their inner-city design preferences – more exploratory qualitative research may be useful to uncover more about what people want.

- Also of importance is the need to address people’s preconceptions of central city residential developments. There remains the perception that these can be of poor quality, with high density ‘shoebox’ housing and poor long-term maintenance.
  - Therefore it will be important for potential residents to know that they will have the same, if not greater, level of control over their property and neighbourhood as they feel they have in suburbia. Our understanding is that these is best achieved in multi-tenant/owner developments via well designed and managed body corporates. Therefore these should be actively encouraged to the fullest extent possible by both the Council and developers.
Appendix
Appendix: Mean score calculations

- The following values were used to calculate the means scores for the average number of bedrooms desired, the average desired house price and average desired weekly rent.

<table>
<thead>
<tr>
<th>Q9a. What price band would you be looking at to purchase a dwelling?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response categories</td>
</tr>
<tr>
<td>Less than $200,000</td>
</tr>
<tr>
<td>$200,001 to $300,000</td>
</tr>
<tr>
<td>$300,001 to $400,000</td>
</tr>
<tr>
<td>$400,001 to $500,000</td>
</tr>
<tr>
<td>$500,001 to $600,000</td>
</tr>
<tr>
<td>$600,001 to $700,000</td>
</tr>
<tr>
<td>$700,001 or more</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q9b. What price band would you be looking at to rent a house (per week)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response categories</td>
</tr>
<tr>
<td>Less than $200 per week</td>
</tr>
<tr>
<td>$201-$300 per week</td>
</tr>
<tr>
<td>$301-$400 per week</td>
</tr>
<tr>
<td>$401-$500 per week</td>
</tr>
<tr>
<td>$501-$600 per week</td>
</tr>
<tr>
<td>$601-$700 per week</td>
</tr>
<tr>
<td>$701-$800 per week</td>
</tr>
<tr>
<td>$801 or more per week</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q10. How many bedrooms would you expect / hope this dwelling to have?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response categories</td>
</tr>
<tr>
<td>1 bedroom</td>
</tr>
<tr>
<td>2 bedrooms</td>
</tr>
<tr>
<td>3 bedrooms</td>
</tr>
<tr>
<td>4 bedrooms</td>
</tr>
<tr>
<td>5 bedrooms</td>
</tr>
<tr>
<td>6 or more bedrooms</td>
</tr>
<tr>
<td>No separate bedrooms</td>
</tr>
<tr>
<td>Single room in dwelling</td>
</tr>
</tbody>
</table>
## Appendix: Maxdiff full headings

Full attribute headings have been shortened on the charts for ease of reading – this list shows the complete list.

<table>
<thead>
<tr>
<th>Neighbourhood</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short commute</td>
<td>A short commute to work, childcare or places of education</td>
</tr>
<tr>
<td>Parks</td>
<td>Close to parks, recreation areas or leisure facilities</td>
</tr>
<tr>
<td>Walking distance</td>
<td>Within walking distance to services such as shops, banks, doctors</td>
</tr>
<tr>
<td>School zones</td>
<td>In desired school zones</td>
</tr>
<tr>
<td>Public transport</td>
<td>Good access to public transport</td>
</tr>
<tr>
<td>Feel safe</td>
<td>Feel safe when walking around the neighbourhood at night</td>
</tr>
<tr>
<td>Variety</td>
<td>A neighbourhood with a wide variety of people and households</td>
</tr>
<tr>
<td>Facilities</td>
<td>Has shared facilities such as BBQ areas, swimming pools, gyms.</td>
</tr>
<tr>
<td>Gardens</td>
<td>Community gardens, vegetable and flower beds</td>
</tr>
<tr>
<td>Neighbours</td>
<td>Shared entrances or outdoor spaces that encourage interaction with neighbours</td>
</tr>
<tr>
<td>Development</td>
<td>Residential development that also includes or is adjacent to other activities such as shops etc</td>
</tr>
<tr>
<td>Quiet streets</td>
<td>Buildings set back or located away from busy streets</td>
</tr>
<tr>
<td>Low maintenance</td>
<td>Low maintenance building and landscaping</td>
</tr>
<tr>
<td>Dwelling features</td>
<td></td>
</tr>
<tr>
<td>Sheltered</td>
<td>Sunny and sheltered aspect</td>
</tr>
<tr>
<td>Good views</td>
<td>Good views</td>
</tr>
<tr>
<td>Outdoor area</td>
<td>A small private garden, courtyard or outdoor area</td>
</tr>
<tr>
<td>Open plan</td>
<td>Open plan living with good indoor / outdoor flow</td>
</tr>
<tr>
<td>Single level</td>
<td>Single level dwelling or minimal use of stairs</td>
</tr>
<tr>
<td>Pets allowed</td>
<td>Dwelling allows for a cat or dog</td>
</tr>
<tr>
<td>Storage</td>
<td>Adequate secure storage for large items such as recreational gear</td>
</tr>
<tr>
<td>Privacy</td>
<td>Privacy by minimising views and noise between neighbours</td>
</tr>
<tr>
<td>‘green’</td>
<td>Building has ‘green’ features such as renewable energy, rainwater collection, or good insulation</td>
</tr>
<tr>
<td>Car parking</td>
<td>Car parking attached to the dwelling</td>
</tr>
</tbody>
</table>
Contact:
jonathan.dodd@ipsos.com
mob. 021 538 634
tel. 09 538 0500