

# Nelson Tasman Annual Monitoring Report

June 2024

**National Policy Statement on Urban Development**

## KEY RESULTS

This report summarises quarterly data for the 12 months ending June 2024 and compares it with the previous year's results (year ending June 2023), unless otherwise stated. Using annual data means any consistent changes to trends in the data are likely to be more reliable. Some of the datasets can exhibit a large degree of variance between quarters due to seasonal fluctuations.

### Population Trends

- The population in the Nelson Tasman urban environment grew by 0.9% over 12 months to reach 88,600.

### Residential Development Trends

#### Housing Demand Indicators

##### Social Housing:

- Nelson Register: 303 applicants, up from 282.
- Tasman Register: 147 applicants, similar to last year (141).
- Considered High Priority Applicants: 90% (approx.) for both regions.
- 686 additional households need affordable housing but don't qualify for the register (Dec 2023).
- Kāinga Ora delivered 43 new state homes.

#### Housing Supply Indicators

##### Dwelling Breakdown

- New dwellings consented in Nelson Tasman decreased by 42% to a total of 493 new dwellings.
- Tasman: Over 50% decline in new dwellings.
  - 94% of new dwellings are stand-alone houses.
  - 6% are townhouses, flats, units, or other dwellings.
- Nelson: 19% decline in building consents.
  - 47% of new dwellings are standalone houses.
  - 32% are apartments.
  - 15% is comprised of attached dwellings (townhouses, flats, units and other dwellings)
  - 5% retirement village units.
- New Zealand: 24% decline in consented dwellings.

#### Sections Created By Subdivision

- Nelson:
  - 138 new residential sections created.
  - 91 greenfield, 32 infill, 15 redevelopments.
  - 93 new residential lots granted resource consent.
- Tasman:
  - 372 new residential sections created.
  - 331 (89%) in the Urban Environment.
  - 146 new residential lots granted resource consent, 38 in the Urban Environment.

## Housing Prices, Rents and Affordability

### **Ministry of Housing and Urban Development House Prices show:**

- Nelson peak: \$758,000 (Dec 2021); now \$686,000 (Jun 2024).
- Tasman peak: \$848,000 (Dec 2021); now \$751,000 (Jun 2024).
- Compared to June 2023: Nelson unchanged, Tasman down 4%.

### **Massey University's quarterly Home Affordability Report shows:**

- Over 12 months Nelson's affordability improved significantly (11%); Tasman's declined.
- Between Feb-May 2024: Both improved; Nelson (9.3%) Tasman (0.1%).
- Tasman: 3rd least affordable (after Auckland and Bay of Plenty) of 16 regions.
- Nelson: 11th least affordable (between Gisborne at 10th, and Wellington at 12th) of 16.

### **Infometrics measures housing and rental affordability shows:**

- Rent as percentage of income in Nelson City (25.2%) and Tasman District (25.3%) was less affordable than the New Zealand average (22.1%).
- Rental affordability has declined over the past year.
- 2023 rental rankings: Nelson 4th, Tasman 1st least affordable of 16 regions.
- Current rental ranking: Nelson 4th, Tasman 3rd least affordable.

## Greenfield and Forecasted Development

- Percentage development classified as greenfield:
  - Nelson: 66%
  - Tasman: 84%
- Projected and actual growth:
  - Nelson: 52 households projected; 222 new dwellings granted building consent.
  - Tasman: 451 dwellings projected; 271 actual new dwellings granted building consent.

## BUSINESS DEVELOPMENT TRENDS

### **Demand of Business Land**

#### **June 2024 Infometrics Quarterly Economic Monitor for Nelson-Tasman**

- GDP: Down 1.3%
- Employment: Increased by 0.9%

### **Supply of Business Land**

- 33% lower new commercial and industrial floor area consented compared to the previous year.
- Nelson: 0 New Business lots and 7 Business Resource Consents.
- Tasman: 26 New Business Lots created in Richmond and 0 Business Resource Consents.

## MONITORING REQUIREMENTS OF NATIONAL POLICY STATEMENT ON URBAN DEVELOPMENT 2020

The National Policy Statement on Urban Development 2020 (**NPSUD**) came into force in August 2020 and sets out the objectives and policies for planning well-functioning urban environments under the Resource Management Act 1991. The NPSUD applies to all local authorities with an urban environment within their boundaries. The NPSUD replaced the earlier National Policy Statement on Urban Development Capacity.

The NPSUD requires all local authorities with an urban environment to monitor quarterly, a set of indicators relating to housing and business land development, and to publish the results of its monitoring at least annually. Regular monitoring helps councils better understand factors affecting the demand and delivery of residential and business development and helps inform planning processes, including infrastructure investment.

As Nelson City Council and Tasman District Council (**the Councils**) each have jurisdiction over parts of the Nelson Tasman tier 2 Urban Environment, the Councils are jointly responsible for monitoring development trends. The Councils also monitor development trends more widely, including at the region-wide level and for rural areas outside of the Urban Environment. Where relevant data is available, this has been included in this annual report.

Since 2017, the Councils have monitored urban development trends, as required by the previous National Policy Statement on Urban Development Capacity 2016. These earlier reports are available on the Councils' websites. See [Tasman District Council Urban Development Monitoring Reports](#) and [Nelson City Council Urban Development Monitoring Reports](#).

## NELSON TASMAN URBAN ENVIRONMENT

This report covers development trends for the Nelson Tasman Urban Environment, as well as the wider Nelson City and Tasman District local authority areas. The Councils are jointly responsible for the NPSUD monitoring requirements.

The Councils have agreed the Nelson Tasman Urban Environment comprises the following city and towns: Nelson, Richmond, Motueka, Māpua, Wakefield, Brightwater, Cable Bay and Hira. This is based on the NPSUD definition of 'urban environment', recognising these communities are part of the same labour and housing market, and are or are intended to be predominantly urban in character and can include non-contiguous areas of urban land.

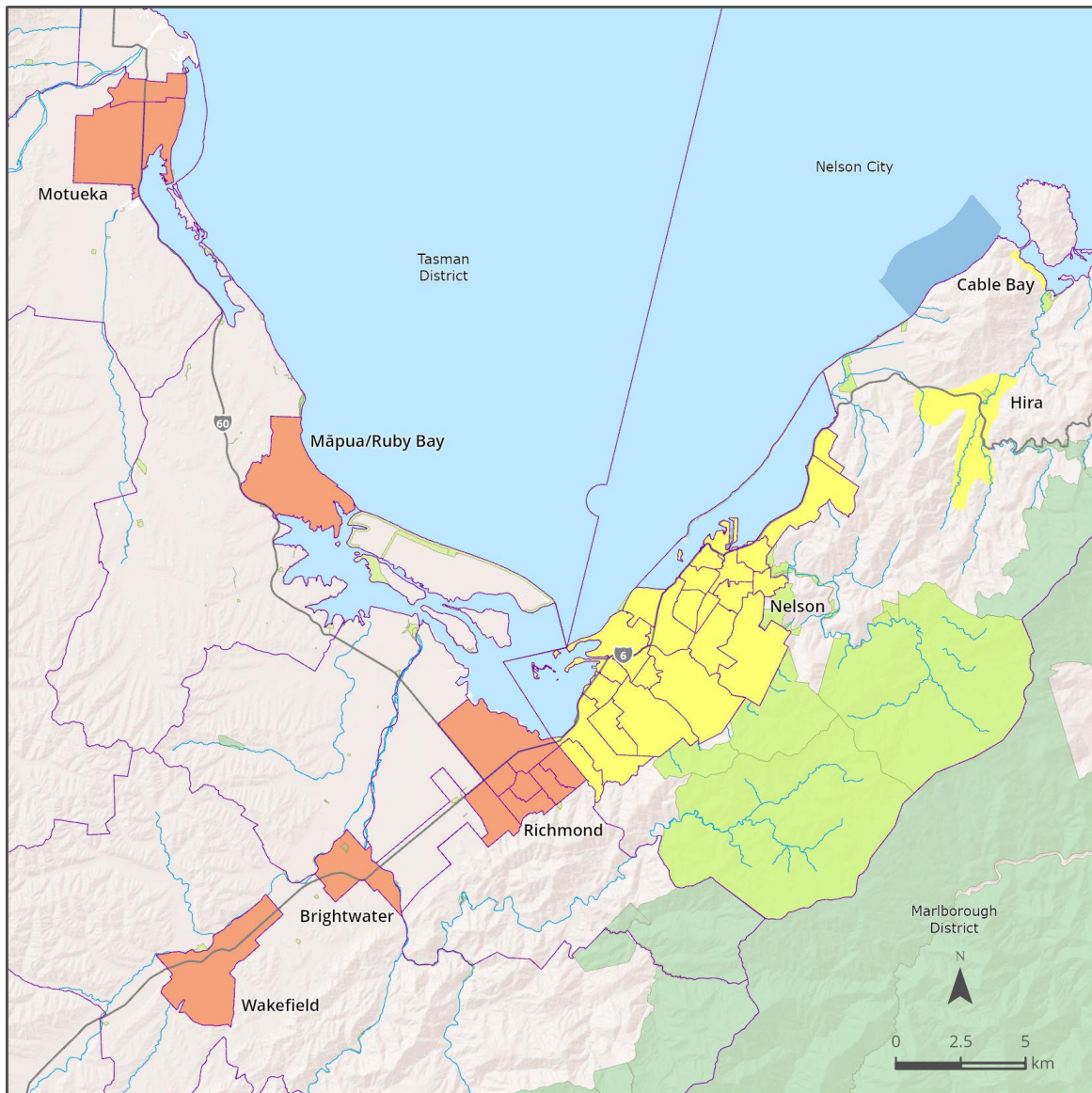


Fig 1 Nelson Tasman Urban Environment

### POPULATION TRENDS

In the year ending June 2024, Nelson and Tasman experienced a 0.7% population growth, reaching 55,200 and 60,000 residents respectively. The Nelson Tasman Urban Environment's population grew by 0.9%, totalling 88,600, with 60% (53,100) residing in Nelson and 40% (35,500) in Tasman.

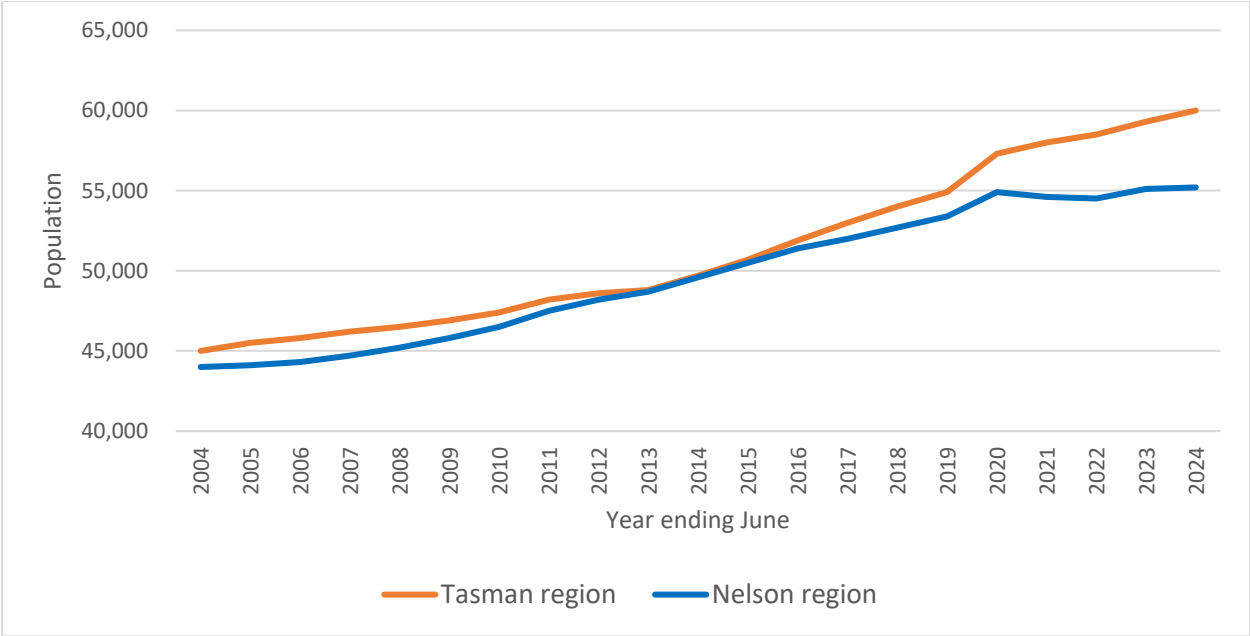


Figure 2 Statistics New Zealand Population Estimates, Nelson and Tasman

## RESIDENTIAL DEVELOPMENT TRENDS

### Housing Demand and Supply

There are many market dynamics that affect the supply and price of housing. These include the cost of infrastructure and building materials, the availability of skilled labour, and bank lending policies to both developers and buyers. The release of new land and housing to the market, the types of new housing, and investor purchase of housing significantly impact the housing market.

The Councils have responded to growth pressures in various planning processes and infrastructure investments. This included the adoption of the Nelson Tasman Future Development Strategy 2022-2052 and its Implementation Plan which tracks progress on growth projects and is reviewed annually. The most recent Implementation Plan is scheduled for adoption in November 2024. Other ongoing processes include the recently adopted Long Term Plans (LTP) 2024-2034 and plan changes to the Nelson and Tasman Resource Management Plans.

The Nelson Tasman Housing and Business Capacity Assessments 2024 considered demand and capacity for housing and business land over a 30-year period. The assessment for the combined Nelson Tasman Urban Environment demonstrated sufficient housing capacity in the short term (1-3 years) and long term (11-30 years) but not in the medium term (4-10 years). The insufficiency over the medium term is a result of constrained funding to provide infrastructure on time, but this is planned to be resolved over the longer term.

Dwellings Capacity by Urban Environment			
	Tasman	Nelson	Combined
Short Term (1 - 3 years)	√	√	√
Medium Term (4 - 10 years)	X	X	X
Long Term (11 - 30 years)	√	√	√

√ = Sufficient Capacity X = Insufficient Capacity

Table 2 Sufficiency of Capacity for Dwellings in the Nelson Tasman Urban Environment

On business land demand and capacity, there is sufficient capacity for the next 30 years in the Nelson Tasman Urban Environment. Individually, surplus business land capacity in Tasman over the 30 years will address the shortfall of retail, commercial and industrial land in Nelson in both the medium and long term.

The following charts from the Ministry of Housing and Urban Development (MHUD) illustrate the trends in housing supply (solid line) and housing demand (dotted line). Housing supply data is derived from consented new dwellings, while housing demand is inferred from household growth, incorporating population growth and household size estimates.



Figure 3: Nelson City Housing Supply and Demand 2024



Figure 4: Tasman District Housing Supply and Demand 2024

Between 2014 and 2021, the housing supply in Nelson and Tasman did not generally keep up with the increasing demand for housing. However, in recent years the number of new dwellings has theoretically exceeded household growth at a regional level, noting that this does not account for issues of affordability or the market for holiday homes.



## Housing Demand Indicators

According to the Ministry of Social Development's Social Housing Register, the number of eligible applicants on the waiting list for social housing has risen over the past year. In Nelson, the number of applicants has increased by approximately 7%. In comparison, the number for Tasman is similar to last year's figures.

As of June 2024, there were 303 eligible applicants for social housing in Nelson and 147 in Tasman. Most applicants are considered high priority for both Nelson (91%) and Tasman (90%) aligning with the slightly higher national average of 93%. This compares with 282 for Nelson in June 2023 and 141 for Tasman. For context, when compared to eight years ago, Nelson has seen its number of applicants rise significantly, increasing from 38 in June 2016 to over seven times that amount. Similarly, Tasman has experienced a nearly nine-fold growth, with the number of applicants growing from 16 in June 2016.

As of 31 December 2023, a survey by the Nelson Tasman Housing Trust revealed that the demand for affordable housing extends beyond those on the Social Housing Register. Specifically, an additional 686 households were identified as needing affordable housing but did not qualify for the public housing register.

Motor camps in the region have accommodated a significant number of people wintering over. However, many of these people will need to move out either for the busy summer season or because there are new limits on the length of stays (50 days). Some campsites have opted to move away from long-term and permanent residents.

Kāinga Ora delivered 43 new state homes in Nelson Tasman in the 2023/2024 period.

## Housing Supply Indicators

The Councils have additional data on recent residential development trends, detailing the type and location of development.

### New Dwellings Granted Building Consent

The number of new dwellings consented in Nelson Tasman decreased by 42% compared with the previous year, with 493 new dwellings consented. Nelson saw a 20% decline in building consents and Tasman experienced a significant decline of over 50% fewer new dwellings than the previous year. This reflects the downturn in the market and a national downward trend. All regions experienced a decrease in consented dwellings for the year ending June 2024, with the total for New Zealand declining by 24% compared to the previous year. Economists are predicting the start of a recovery of the residential construction market sometime in 2025.

Year Ending	Jun 2020	Jun 2021	Jun 2022	Jun 2023	Jun 2024	Annual Change 2023/2024
<b>NEW DWELLINGS</b>						
<b>Total Nelson City and Tasman District</b>	755	878	819	853	493	-360
Tasman	491	618	562	577	271	-306
Nelson	264	260	257	276	222	-57
<b>Urban Environment</b>	597	718	645	677	381	-296
Urban Environment (Tasman part)	344	467	396	407	171	-236
Urban Environment (Nelson part)	253	251	249	270	210	-60

Table 1 Building Consents 2020-2024

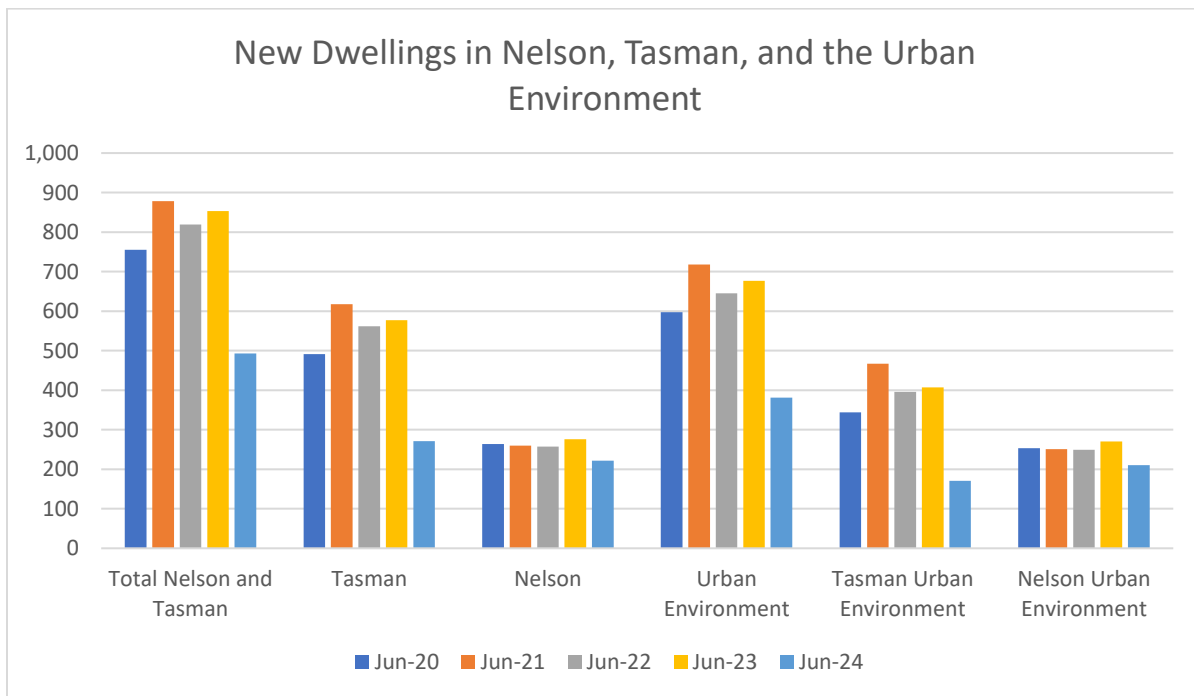


Figure 5 Building Consents 2020-2024

## Dwellings by Type

### Nelson

An increasing proportion of new dwellings in Nelson have been apartments, which make up just under a third of the new dwellings for the 2023/2024 year. Standalone houses still make up the largest share of new dwellings (47%).

### Tasman

Stand-alone houses continue to be the dominant housing typology in Tasman, making up 94% of total dwellings in 2023/2024. New dwellings classed as townhouses, flats, units or other dwellings consented made up the remaining 6%.

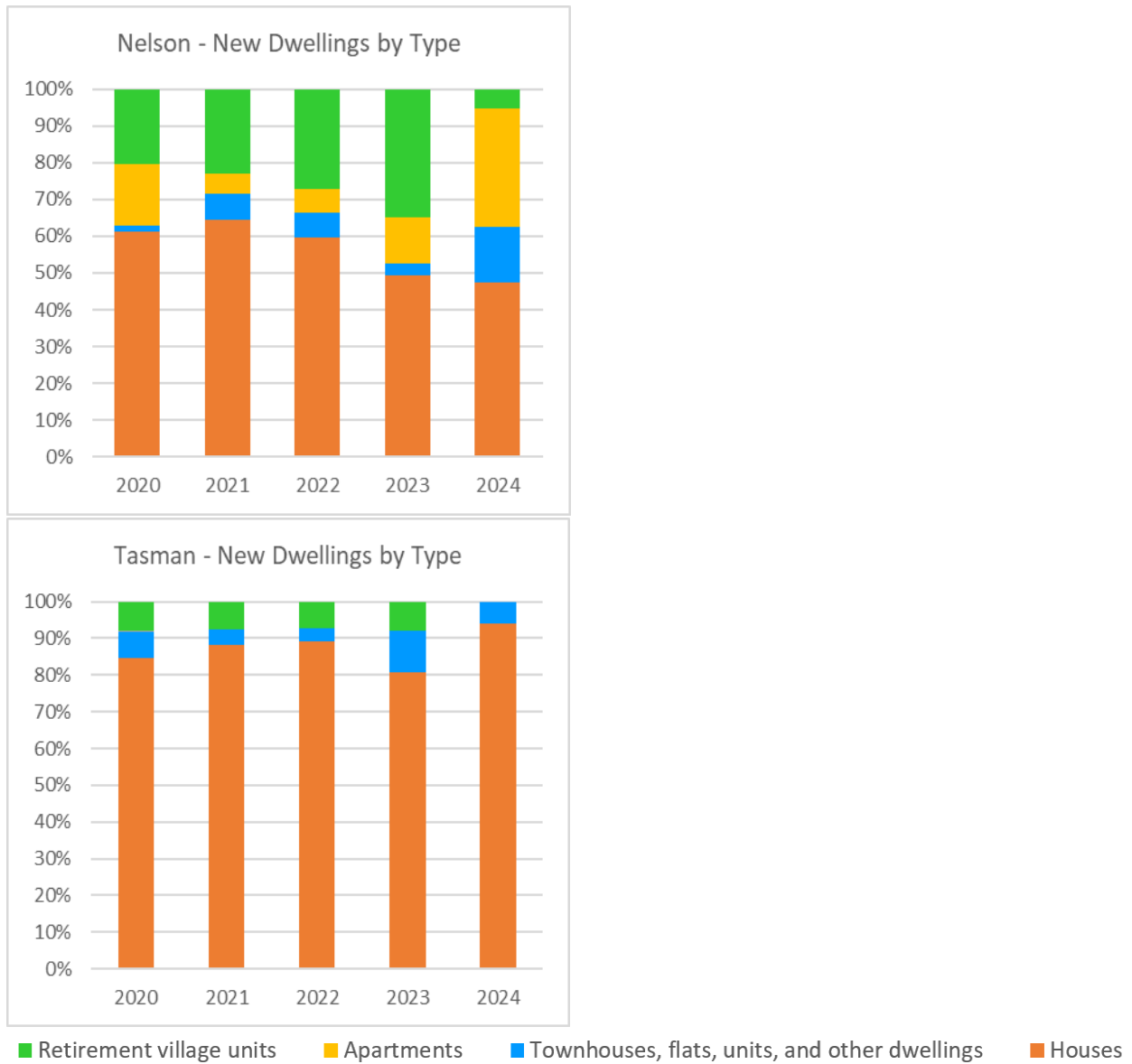


Figure 6 Residential Building Consents by Type

## Sections Created and Granted Resource Consent

The number of residential sections being created and granted resource consent (subdivision) are lead indicators on the capacity for future housing supply. The number of sections created uses LINZ data on subdivision consents, where the developer has sent the survey plan to LINZ for approval.

The number of new residential resource consents is based on the resource consents for subdivisions.

	2022/2023		2023/2024	
<b>New Residential Sections Created (LINZ)</b>				
	Urban Environment Only	All of District	Urban Environment Only	All of District
Nelson	181	181	136	138
Tasman	346	375	331	372
<b>Residential Resource Consents (Subdivision)</b>				
	2022/2023		2023/2024	
	Urban Environment Only	All of District	Urban Environment Only	All of District
Nelson	169	169	91	93
Tasman	160	239	38	146

*Table 2 New Residential Sections Created Through Subdivision and Resource Consents (Subdivision)*

### Nelson

There were 138 new residential sections created, in Nelson. Of these 91 were greenfield sites, 32 were infill and 15 were redevelopment sites. This is slightly less than the number of sections created in the previous 12 months.

There were 93 new lots granted resource consent (subdivision) in Nelson City. The bulk of these subdivisions were for the Marsden Park, Solitaire (Marsden Valley), and Bayview greenfield developments (58).

### Tasman

There were 372 new residential sections created for Tasman (331 (89%) in the Urban Environment), which is very similar to the previous two years. Of these, 274 sections were created in Richmond with between 24-27 sections each in Brightwater and Wakefield. The majority of the Richmond sections were in Lower Queen Street in the Applebyfields and Meadows developments, with the remainder in Richmond South and Richmond intensification area.

The rest of the sections were spread around the Tasman District, predominantly located in the Moutere ward and a small number in Golden Bay (Matenga road subdivision).

Despite the significant drop off in building consents for this period, the number of new residential sections created has remained the same as the two previous years, which is a positive indicator for potential future building consents.

There were 146 new residential lots granted resource consent (subdivision) in all of Tasman District, of which 38 were in the Urban Environment. This total is 40% lower than in 2022/2023 and has been trending downwards since 2021. They comprise a large number of small subdivisions on the whole, with markedly more outside the Urban Environment during this period. There was a 12-lot subdivision consented in Wakefield.

### Housing Prices, Rents and Affordability

Housing affordability is the cost of housing relative to a household’s income.

#### House Prices

Data from the MHUD shows a steep rise in house prices in Nelson and Tasman between 2016 and 2022. Since then, house prices have reduced. The peak median sales price for a house in Nelson reached \$758,000 and \$848,000 in Tasman in December 2021. As of June 2024, now sitting at \$686,000 and \$751,000 respectively. When compared with the same period for 2023 there was a decrease of 4% for Tasman, while Nelson house prices remained the same. However, compared with five years ago, Nelson house prices are 21% higher, and Tasman house prices are 26% higher.



Figure 7 Median Sales Price (MHUD)

#### House Rent

Data from MHUD shows a continuing increase in average rents in Nelson and Tasman. As of June 2024, the average rent in Nelson was \$544, up 3% compared with a year ago, and 30% higher than five years ago. The average rent in Tasman was \$541, up 3% and 37% respectively.

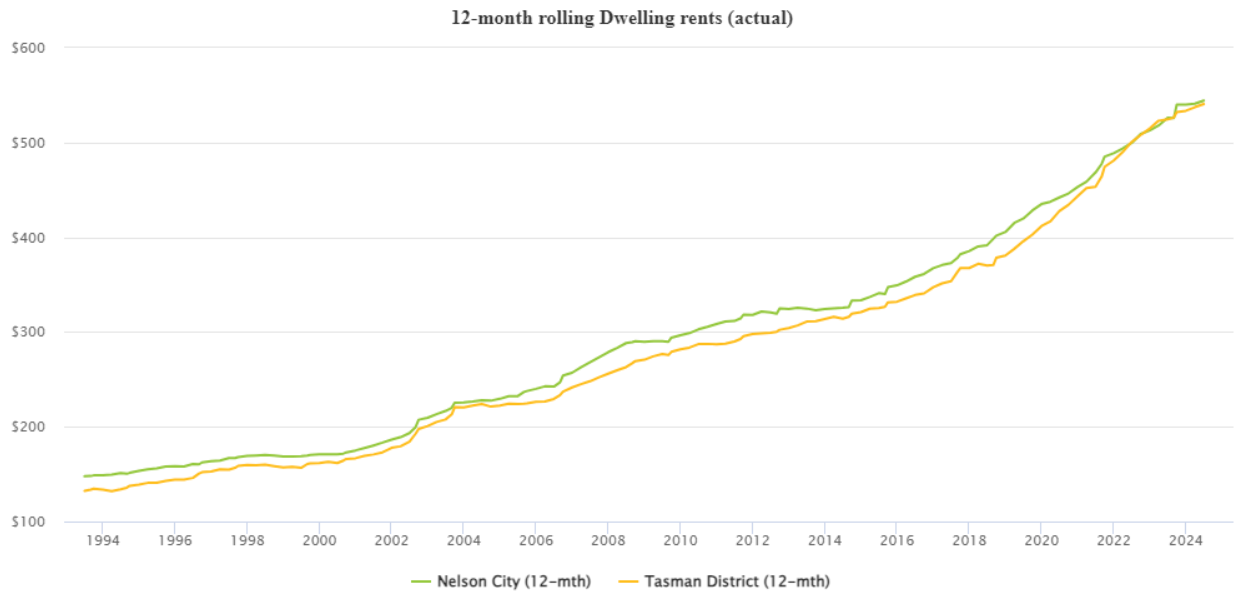


Figure 8 Average Rents (MHUD)

**Massey University Home Affordability and Residential Rental Reports**

Massey University publishes a quarterly Home Affordability Report with a home affordability index by region. The index takes into account house prices, the cost of borrowing (interest rates), and wage levels. The June 2024 report shows a significant improvement in home affordability in Nelson but a decline in Tasman over the last 12 months. Both showed an improvement between February and May 2024 although Tasman’s improvement was only slight (0.1%).

According to the Home Affordability Index, Tasman is the third least affordable region to buy a house (behind Auckland and Bay of Plenty). Nelson is currently the 11<sup>th</sup> least affordable sitting between Gisborne at 10<sup>th</sup> place and Wellington at 12<sup>th</sup>.

HOME AFFORDABILITY INDEX				PERCENTAGE CHANGE IN HOME AFFORDABILITY IN THE LAST 12 MONTHS		PERCENTAGE CHANGE IN HOME AFFORDABILITY IN THE LAST 3 MONTHS	
Region	May 2023	Feb 2024	May 2024	Improvement	Decline	Improvement	Decline
Northland	39.7	41.5	37.6	5.5%		9.5%	
Auckland	44.4	47.9	46.6		4.8%	2.9%	
Waikato	38.3	40.0	38.2	0.1%		4.4%	
Bay of Plenty	42.3	44.5	44.3		4.7%	0.4%	
Gisborne	35.8	36.3	34.8	2.9%		4.2%	
Hawke's Bay	37.0	38.5	37.7		1.8%	2.1%	
Manawatū/Whanganui	27.9	27.5	29.9		7.0%		8.6%
Taranaki	29.4	34.7	32.1		9.3%	7.3%	
Wellington	34.3	35.8	34.3		0.0%	4.2%	
Tasman	41.3	43.7	43.7		5.7%	0.1%	
Nelson	39.0	38.3	34.7	11.0%		9.3%	
Marlborough	34.3	37.8	37.2		8.4%	1.7%	
West Coast	20.3	18.5	22.8		12.0%		23.2%
Canterbury	38.4	40.9	39.6		3.2%	3.2%	
Otago	36.9	37.1	36.7	0.6%		1.0%	
Southland	24.6	25.5	25.7		4.7%		1.0%
All Regions	38.1	39.8	38.1		0.1%	4.3%	

Table 3 Massey University Home Affordability Report (June 2024)

Massey University also publishes a quarterly Rental Report with rental affordability by region. Rental affordability is calculated by comparing average weekly wages and average rents. The December 2023 quarterly report shows an improvement in rental affordability from June 2023 to September 2023 in Nelson of 3.3% and in Tasman of 8.7%. This is a significant improvement when compared to the National Improvement during the same period at 0.4%.

### Infometrics Housing and Rental Affordability

Infometrics publishes measures of housing and rental affordability. Housing affordability is measured by the ratio between average house values and average annual household income.

The average house value in Nelson is 7.8 times the average household income, while in Tasman, it is 7.4 times. During the last ten years, the ratio for Nelson and Tasman peaked and was least affordable between December 2021 and March 2022 with ratios of 9.8 and 9.0 respectively.

Based on this measure, both Nelson and Tasman have worse housing affordability than the national average (6.9 times the average household income).

Infometrics use a rent affordability measure which is the ratio of the average weekly rent to average household income. A higher ratio, therefore, suggests that the average rent takes up a greater proportion of the average income, which indicates lower rent affordability.

Rental affordability in Nelson and Tasman has seen a decline over the past year. In 2023, Nelson and Tasman were ranked in the top four least affordable regions, at 4th and 1st, respectively. Nelson still ranks as the 4th least affordable territorial authority for renting, while Tasman has moved to 3rd place.

The proportion of income spent on rent in Nelson City stands at 25.2%, while in Tasman District it is slightly higher at 25.3%. These figures indicate that residents in these areas are dedicating a larger share of their income to housing costs compared to the national average of 22.1%.

### Proportion of Capacity in Greenfield Areas or in Previously Developed Areas

A new monitoring requirement of the NPSUD is the proportion of housing development capacity which has been realised, in either existing urbanised areas or in previously undeveloped areas (greenfield).

There were 138 new residential sections created in Nelson. Of these 91 (66%) were greenfield sites, 32 were infill and 15 were redevelopment sites. The bulk of these subdivisions were for the Marsden Park, Solitaire (Marsden Valley), and Bayview greenfield developments.

Of the 171 new dwellings granted building consent in Tasman's part of the Urban Environment (see table 1), the majority (143 dwellings, 84%) have been in previously undeveloped areas, mostly in Richmond West. There have been 28 new dwellings in the existing urbanised areas of Richmond and Motueka.

### Comparing Actual and Forecast Development

Although Nelson and Tasman recently adopted their respective 2024-2034 LTPs, this Monitoring Report focuses on year ending June 2024, while year one of the 2024-2034 LTPs are for 2024/2025. Therefore, the projections used for forecasting below are from year three of the 2021-2031 LTP (2023-2024).

#### **Nelson**

Year three of the 2021-2031 LTP contains projections for household growth over 10 years from 2021. For the year ending 30 June 2024, there was a projected growth of an additional 52 households. In total, there were 222 new dwelling building consents granted in the year.

Council has updated its growth assumption for the LTP 2024-2034, with 1,108 new household expected from 2023 to 2028.

#### **Tasman**

Tasman estimates demand and capacity for its main townships and communities. The following table compares the actual number of new dwellings with the number projected in Council's growth model. The actual number is based on building consents for new dwellings. The numbers of projected new dwellings were based on the population growth assumption and the infrastructure work programme in the 2021-2031 LTP.

Growth in Tasman District has been lower than expected in most of the main towns and communities during 2023/2024. Actual growth in Tasman District in 2021/2022 and 2022/2023 was significantly higher than expected, particularly in Richmond.



Growth in Golden Bay has been higher than expected for the last three years. Growth has been lower than expected for the last three years in Brightwater, Wakefield, Motueka and Lakes-Murchison.

	<b>Tasman's Growth Model 2023/2024</b>		
	<b>Number of new dwellings projected (based on LTP projections)</b>	<b>Actual number of new dwellings (granted building consent)</b>	<b>Difference between actual and projected new dwellings</b>
Richmond	185	131	-54
Brightwater	16	6	-10
Wakefield	36	10	-26
Māpua	34	19	-15
Motueka	39	5	-34
Moutere	53	31	-22
Lakes-Murchison	26	14	-12
Golden Bay	26	29	+3
Tasman District	451	271	-180

*Table 4 Tasman's Growth Model Dwelling Forecasts Compared with Building Consents 2023/2024*

The growth assumption for the LTP 2021-2031 was made in 2020 based on the best information available at the time. Council has updated its growth assumption for the LTP 2024-2034, with 399 new dwellings expected each year from 2024/2025 to 2027/2028.

## BUSINESS DEVELOPMENT TRENDS

### Demand for Business Land

The June 2024 Infometrics Quarterly Economic Monitor for Nelson Tasman, shows that Gross Domestic Product was provisionally down 1.3% for the year to June 2024. This was driven by reduced activity in manufacturing, construction, retail and transport, which may have an impact on demand for business floorspace. However, employment numbers increased, by 0.9% annually, led by health and public administration.

#### Gross domestic product

Annual level, Nelson-Tasman

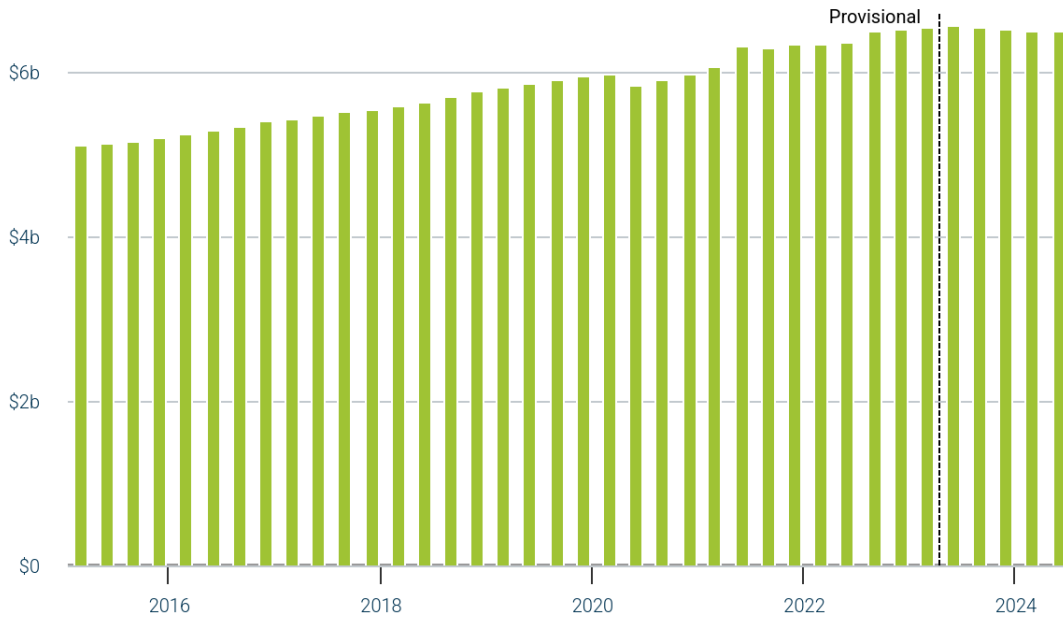


Fig 9 GDP June 2024 Quarter Infometrics

## Employment (place of residence)

Annual level, Nelson-Tasman

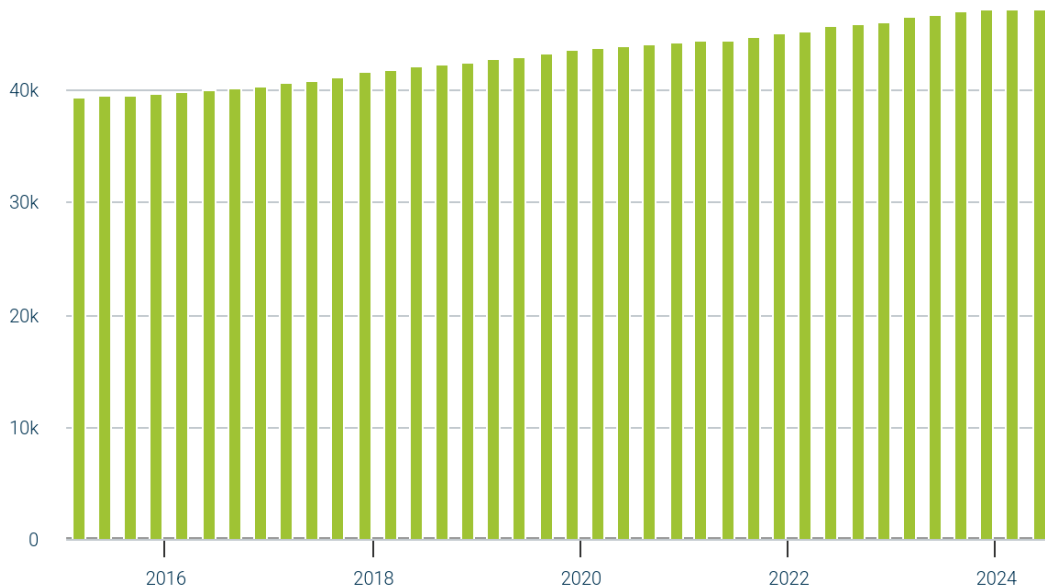


Fig 10 Employment Numbers June 2024 Infometrics

## Supply of Business Land

### New Buildings Granted Building Consent

One measure of retail, commercial and industrial business land development is the total floor area for new building consents, for new buildings which are either commercial buildings (including shops, restaurants, bars, offices), factories, industrial and storage buildings, or hotels, motels and other short-term accommodation.

The amount of new commercial and industrial floor area consented in the Nelson Tasman Urban Environment was 33% lower than the previous year. This decline may be attributed to a significant increase in the year ending June 2023, when the amount of floor space consented in Nelson was notably higher than in previous years. Most of this increase is attributed to a single retail development (10,712 sqm) at Cadillac Way. Tasman also consented significantly more business space last year, due to large industrial projects (wood and hop processing) in the rural environment.

	Year ending June					Annual Change 23/24	
	Jun-20	Jun-21	Jun-22	Jun-23	Jun-24		
<b>Total Nelson City and Tasman District</b>	21,283	25,603	34,619	45,888	26,998	-18,890	-41%
Tasman	14,229	18,043	31,450	29,367	17,399	-11,968	-41%
Nelson	7,054	7,560	3,169	16,521	9,599	-6,922	-42%
<b>Urban Environment</b>	15,113	19,540	18,213	28,230	18,967	-9,263	-33%
Urban Environment (Tasman part)	9,209	12,455	15,116	11,953	9,368	-2,585	-22%
Urban Environment (Nelson part)	5,904	7,085	3,097	16,277	9,599,	-6,678,	-41%

Table 5 New Commercial and Industrial Buildings Granted Building Consent by Floorspace (sqm)

### Business Sections Created and Granted Resource Consent

The numbers of commercial and industrial sections being created according to LINZ and sections granted resource consent are useful lead indicators on the capacity for future business land supply. The number of sections created uses LINZ data on subdivision consents, where the developer has sent the survey plan to LINZ for approval. The number of new business lots granted resource consent is based on subdivision consent.

	2022/2023	2023/2024
<b>New Business Sections Created (LINZ)</b>		
Nelson City	0	0
Tasman District	21	26
<b>New Business Sections Granted Resource Consent</b>		
Nelson City	0	7
Tasman District	27	0

Table 6 New Business Sections Created and Business Resource Consents

#### Nelson

In 2023/2024, there were no new business lots created in Nelson. There were 7 business resource consents granted.

#### Tasman

In 2023/2024, there were 27 new business lots created in Tasman, all in Richmond in Lower Queen Street, (McShane Rd) comprising light industrial lots. In 2023/2024, there were no new commercial or light industrial lots granted resource consent.

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