

P5 presentation Marjolein Bons

*AR4R010 Graduation Laboratory Management in the Built Environment,
Delft University of Technology*

July 05, 2021

Marjolein Bons

Student Number: 4270193

**Board of Examiners
delegate**

- Geert Coumans

Mentors

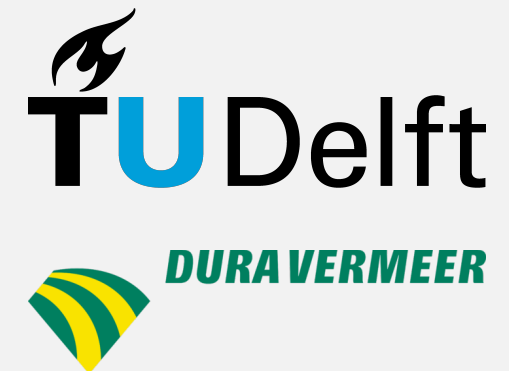
- Sylvia Jansen
- Ellen Geurts
- Peter Boelhouwer

**Graduation
Company**

- Dura Vermeer

Under supervision of

- Rink Drost



Content



Introduction



Theoretical
background



The research
execution



Research Results &
conclusions

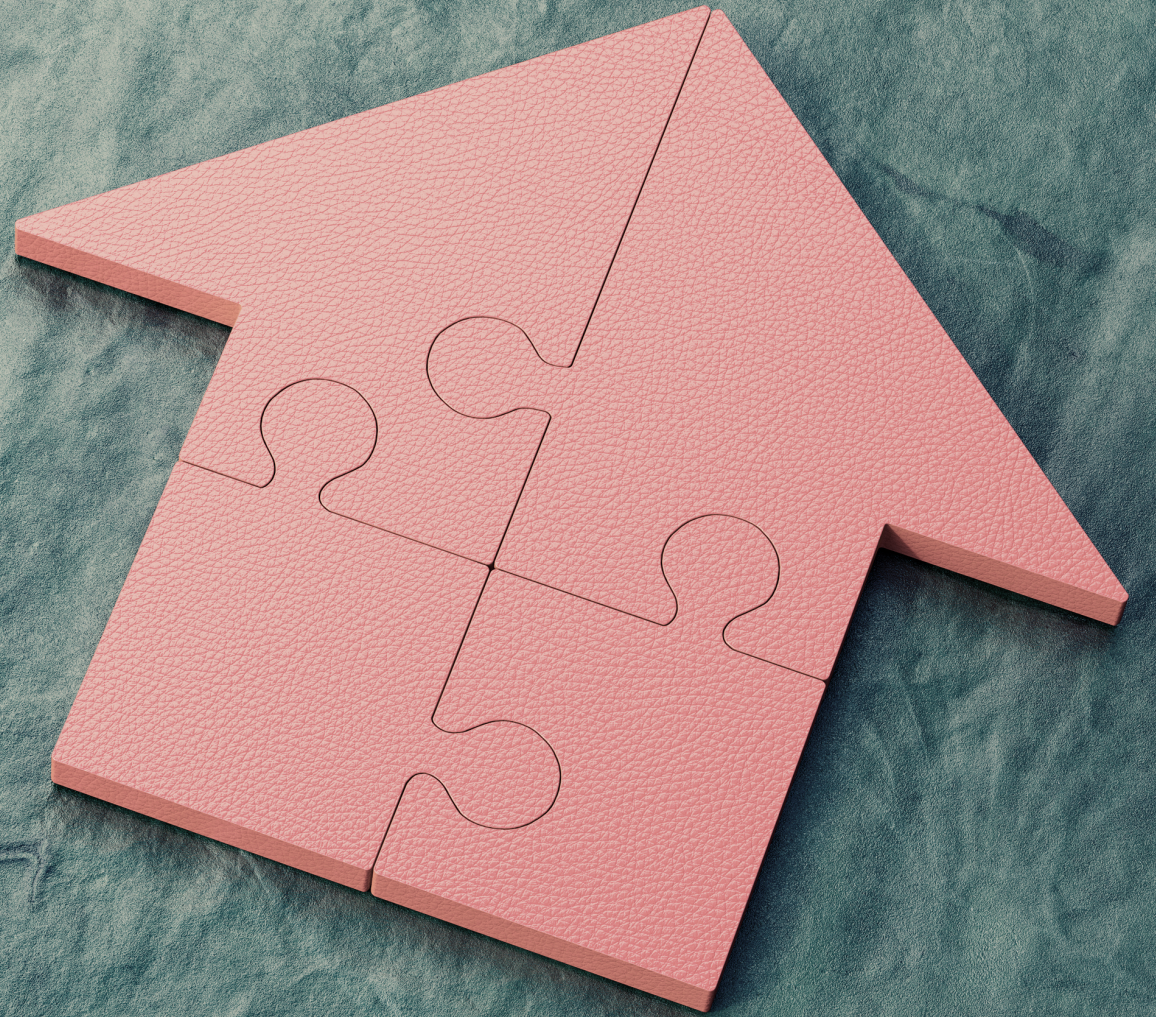


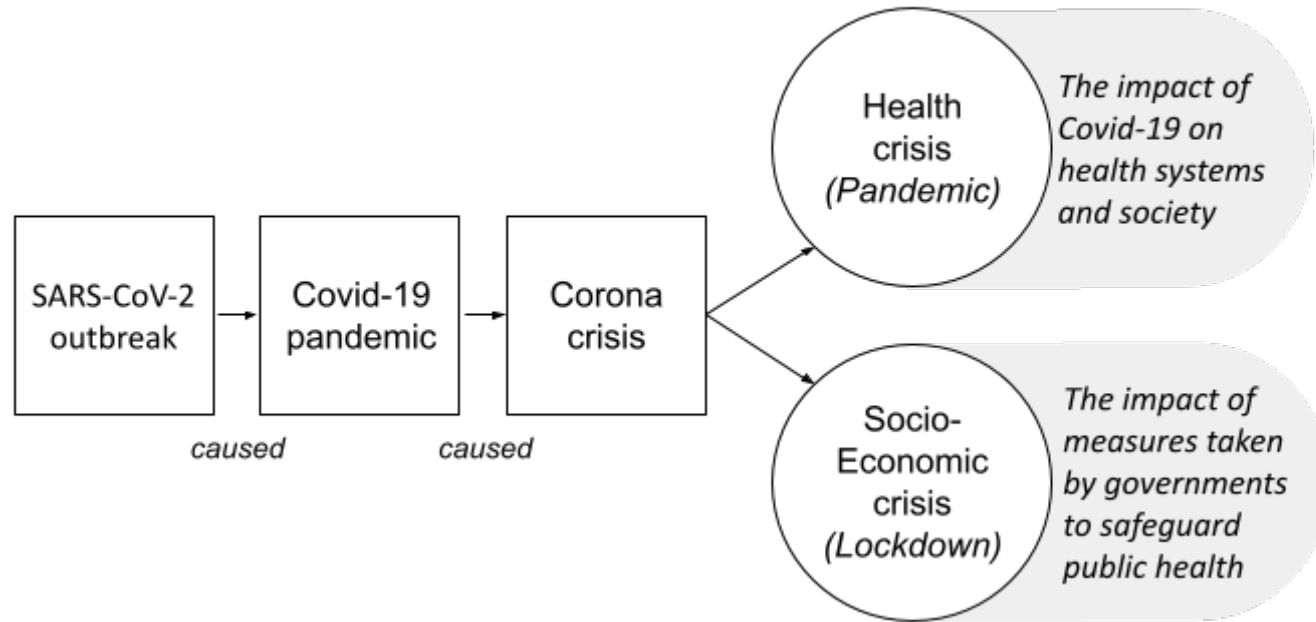
Recommendations



Closing

Would this
change the way
we **use** and
approach our
built
environment?







“[When there is a societal change in the way people live and use their home] this affects many more things than just homes. It also affects mobility, the living environment and [amenities] in the district.”

Paling (2020)



“Due to the corona crisis, more urbanites want to move to the countryside than before”

~ Nieuwsuur, 2020

“The COVID-19 outbreak [...] will further strengthen the preference for lively central locations with high levels of urban amenities”

~ Hesselink and van der Sluys, 2020

12%

considers switching the city life for village-living due to Corona

~ Nieuwsuur, 2020



“Corona is not yet driving homeowners out of the city”

~ Hueck (2020)

“the migration from the Randstad is also continuing and even seems to be getting stronger”

~ Hegger (2020)

“A massive exodus to the countryside is unlikely, let alone to the fringes of the Netherlands”

de Groot, 2020



As such, in my thesis I researched whether and how housing preferences have changed due to the Corona crisis.



Focus on owner-occupied housing market



Research Question

What is the **effect** of the **Corona Crisis** on the **housing preferences** of (aspiring) owner-occupiers in the Dutch housing market?

Which changes in preferences were already in progress before the start of the crisis

Whether change transpired because of the crisis

What change transpired

Among **which groups** change transpired

Why this change transpired

Whether the change is expected to be **temporary** or **permanent**



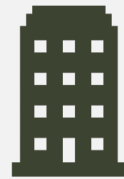
Relevance



Societal



Scientific

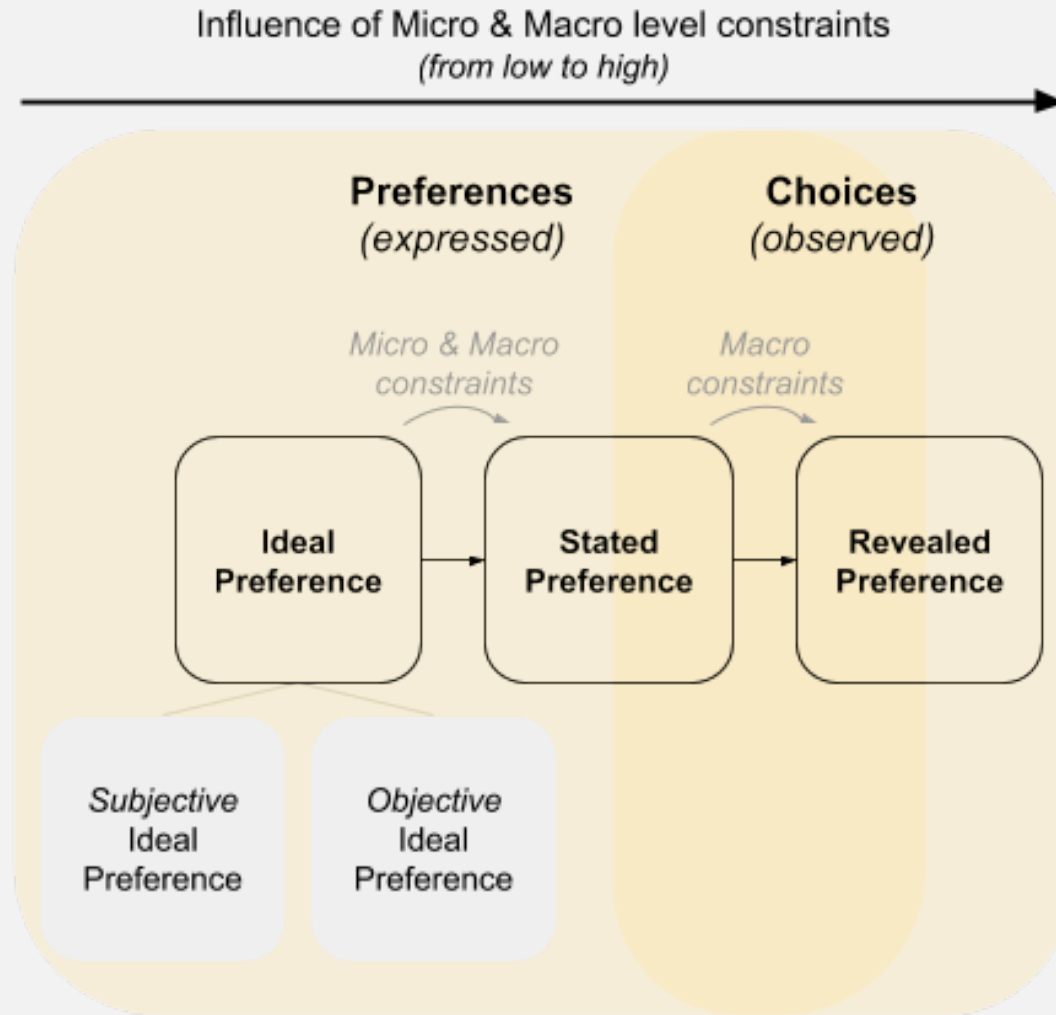


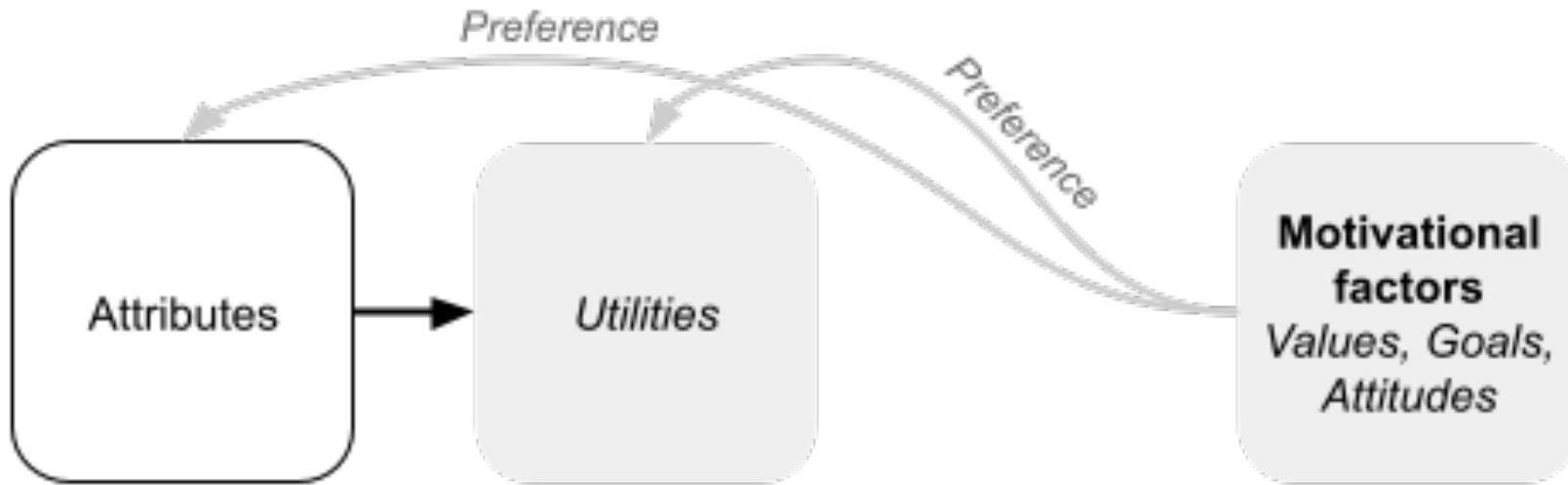
Corporate



So, how does the Corona crisis
instigate change in housing
preferences?

Theoretical background

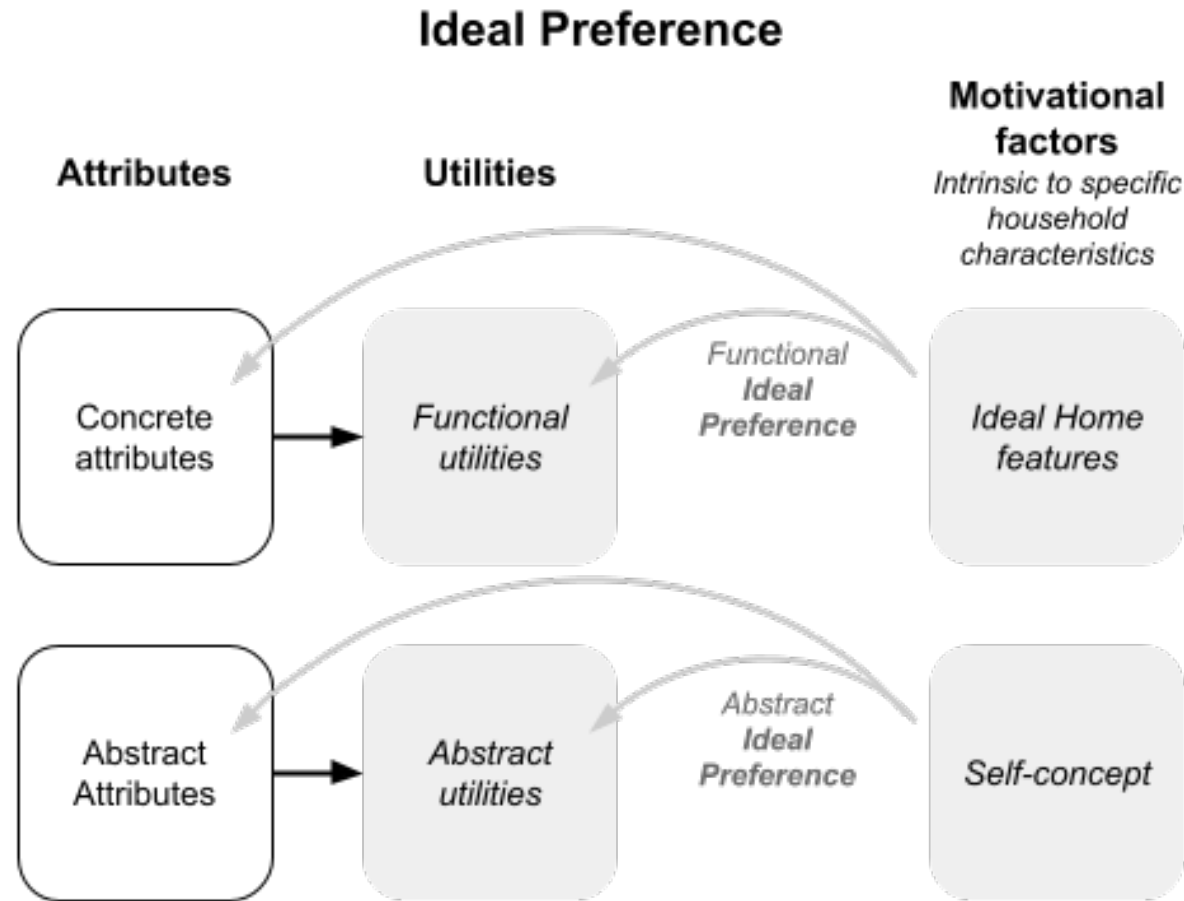






The formation of a preference

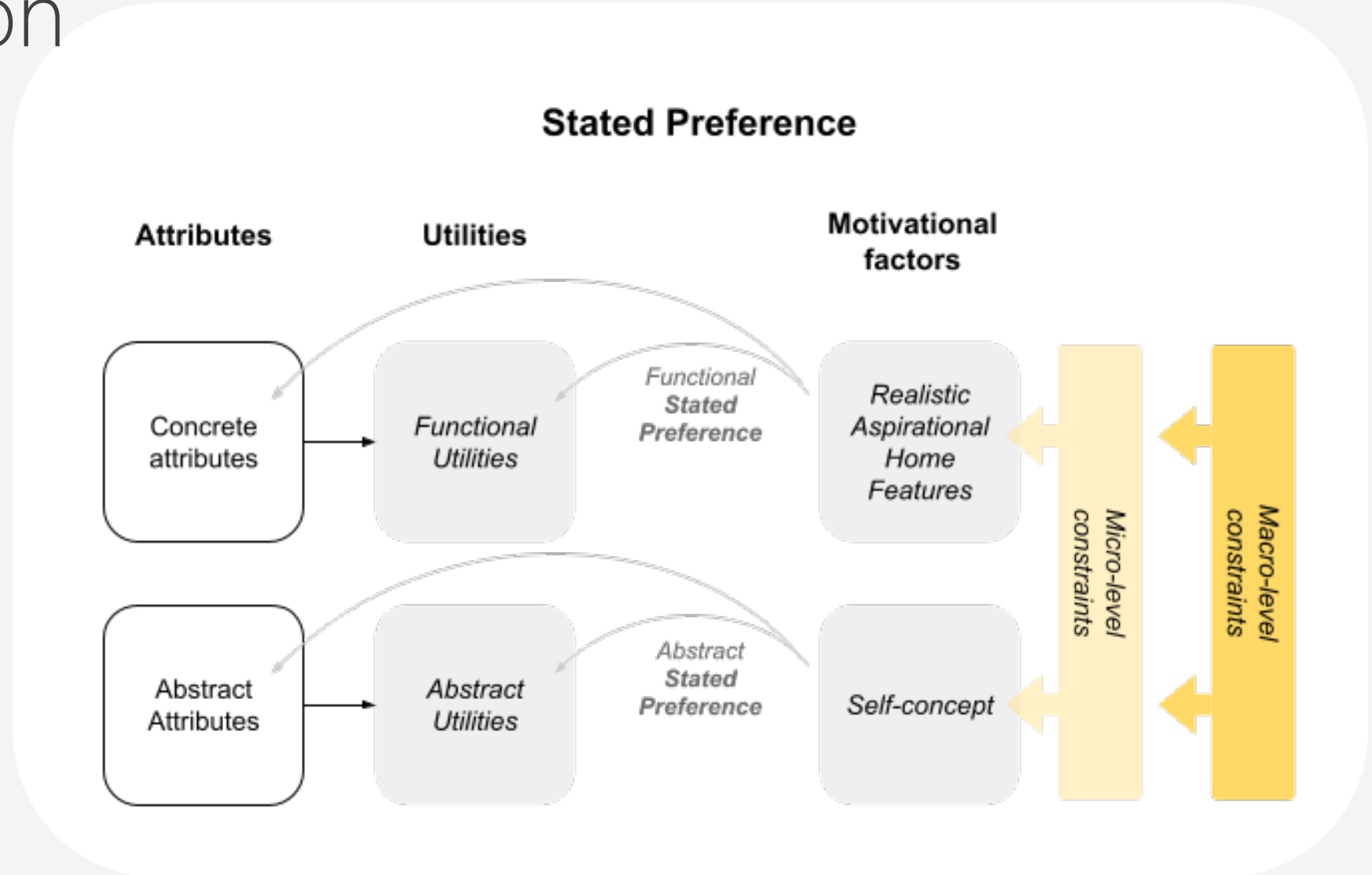
In theory





The formation of a preference

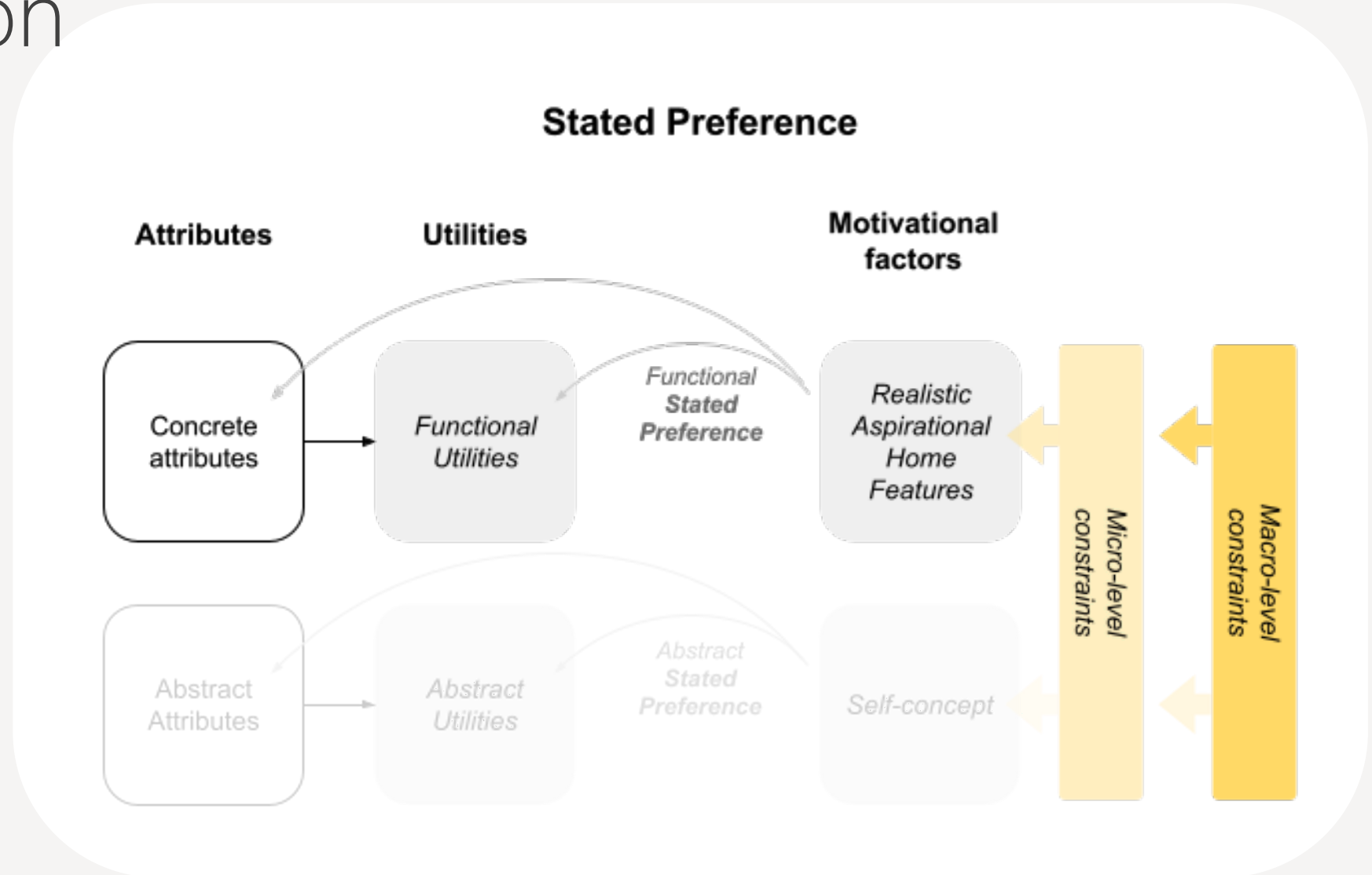
In theory





The formation of a preference

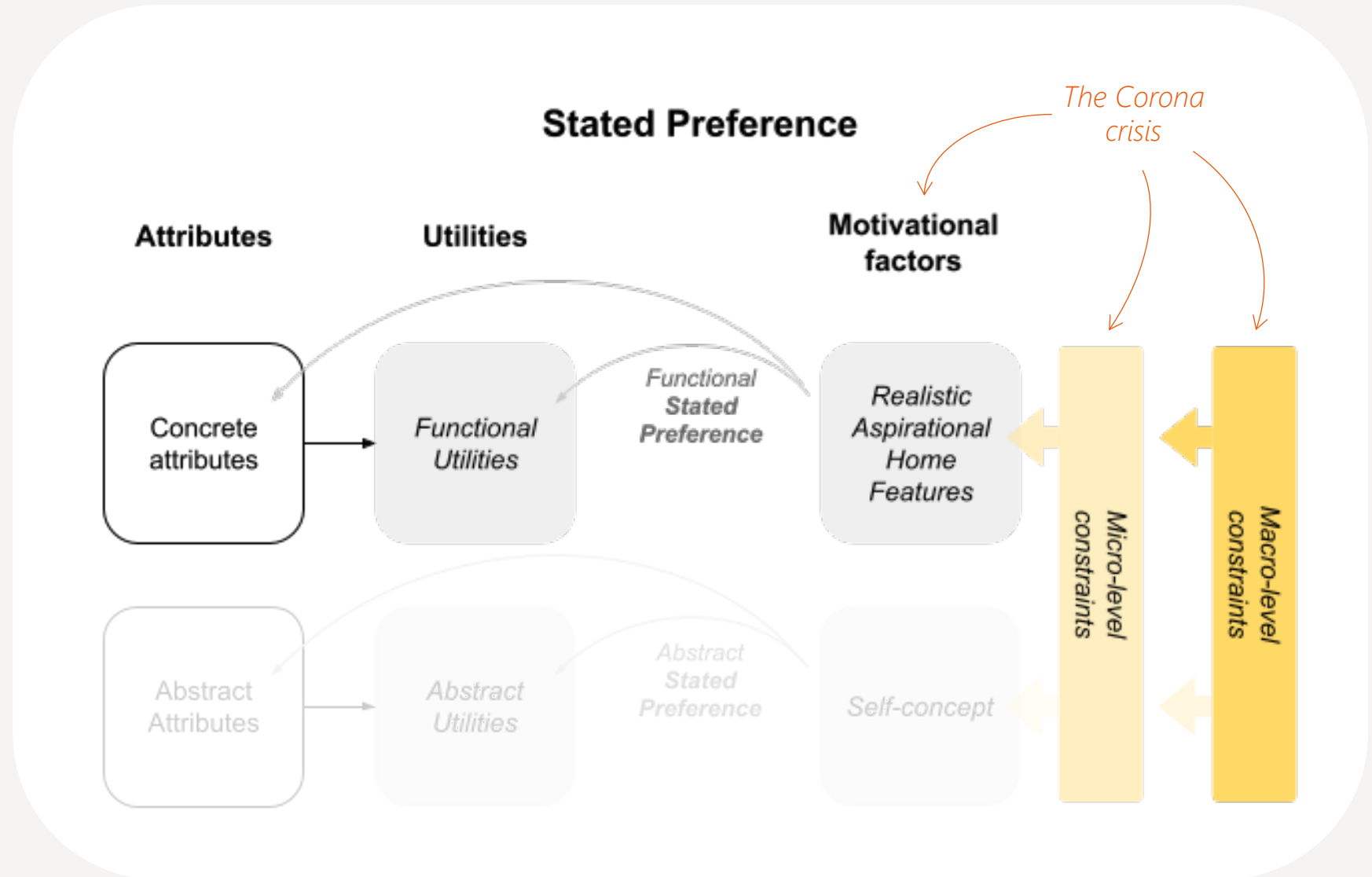
In theory



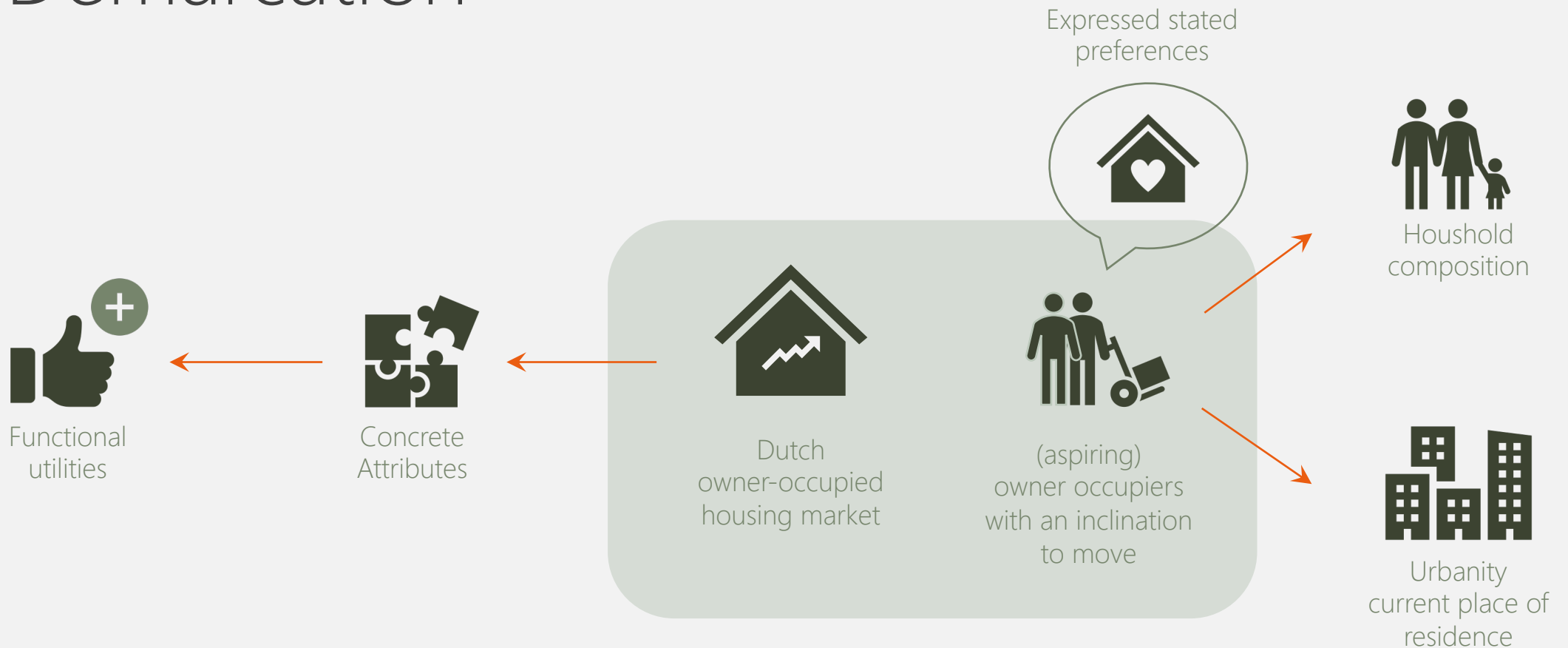


The *change* of a preference

In theory



Demarcation





MARKET RESEARCH



SURVEY



Data collection



Survey tool

Online questionnaire

Distribution tool

Digital newsletter of NieuwbouwNL

Invitation

Email containing a link to the survey

Scope

50.000 subscribers were invited

Onderzoek TU Delft, Dura Vermeer en
Nieuwbouw Nederland



Nieuwbouw Nederland



Marjolein

Zoals je wellicht in de media hebt vernomen, kent Nederland momenteel een groot woningtekort. Er moeten daarom veel nieuwe woningen worden bijgebouwd. Maar voldoen deze woningen aan de huidige woonwensen?

De **TU Delft** (faculteit *Architecture, Urbanism and Building Sciences*) doet in samenwerking met **Dura Vermeer** (een aannemende bouwer) en **Nieuwbouw Nederland** onderzoek naar of de woonwensen van Nederlanders zijn veranderd door de huidige Corona crisis. En zo ja, in welk opzicht zijn deze woonwensen veranderd?

Jouw antwoorden zijn hiervoor van groot belang. De resultaten zullen worden gebruikt voor wetenschappelijk onderzoek en om de juiste woningen en woonwijken te kunnen bouwen.

De enquête bevat zowel open als gesloten vragen, en gaan in op o.a. je huidige woonsituatie en de woonsituatie die je wenst te hebben. Het zal ongeveer 10 minuten van je tijd in beslag nemen. Als je wilt kun je de uitkomsten achteraf krijgen.

[Naar de enquête](#)

Privacy

Nieuwbouw Nederland verstrekt geen persoonsgegevens ten behoeve van deze mailing en de onderliggende enquête. Alle antwoorden worden anoniem verwerkt.

Mocht je een vraag hebben over het onderzoek dan kun je een email sturen naar info@nieuwbouw-nederland.nl

- Team Nieuwbouw Nederland -

[Uitschrijven voor de nieuwsbrief](#)



Welkom bij dit woonvoorkeuren onderzoek!

Zoals je wellicht in de media hebt vernomen, kent Nederland momenteel een groot woningtekort. Er moeten daarom veel nieuwe woningen bijgebouwd gaan worden. Maar voldoen deze woningen aan de huidige woonwensen?

De TU Delft (faculteit *Architecture, Urbanism and Building Sciences*) doet in samenwerking met Dura Vermeer (een aannemende bouwer) onderzoek naar of de woonwensen van Nederlanders veranderd zijn door de huidige Corona crisis. En zo ja, in welk opzicht zijn deze woonwensen veranderd? Graag willen we dat je meedoet aan dit onderzoek. Wil je daarom de vragenlijst invullen? Jouw antwoorden zijn voor ons van groot belang. De resultaten zullen worden gebruikt voor wetenschappelijk onderzoek en om de juiste woningen en woonwijken te kunnen bouwen.

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Privacy. We gaan vertrouwelijk om met je antwoorden. Je antwoorden worden anoniem verwerkt. Mocht je een vraag of klacht hebben over de verwerking van je gegevens dan kun je een email sturen naar privacyofficer@duravermeer.nl.

Mocht je een vraag hebben over het onderzoek dan kun je een email sturen naar Rink Drost (rink.drost@duravermeer.nl).

Alvast bedankt voor je inbreng.

VOLGENDE





Response

- 2719 people opened the questionnaire
- 2471 people filled in the questionnaire

→ Response rate of 4.94%

Some respondents did not meet the selection criteria or did not provide key information

Useful respondents: n=1458





Respondent group and applicability of results

- Large enough sample for extrapolating conclusions to its target group, i.e., people with an inclination to move and who (aspire to) participate in the Dutch owner-occupied housing market.
- Specific group
- Relatively high freedom of choice
- Limitation: Interest in the newly built housing market



Dwelling | Type

Dwelling | Number of rooms

Dwelling | Size

Dwelling | Outdoor space

Price

Location | Moving distance from the current place of residence

Location | City size

Location | Neighborhood characteristic

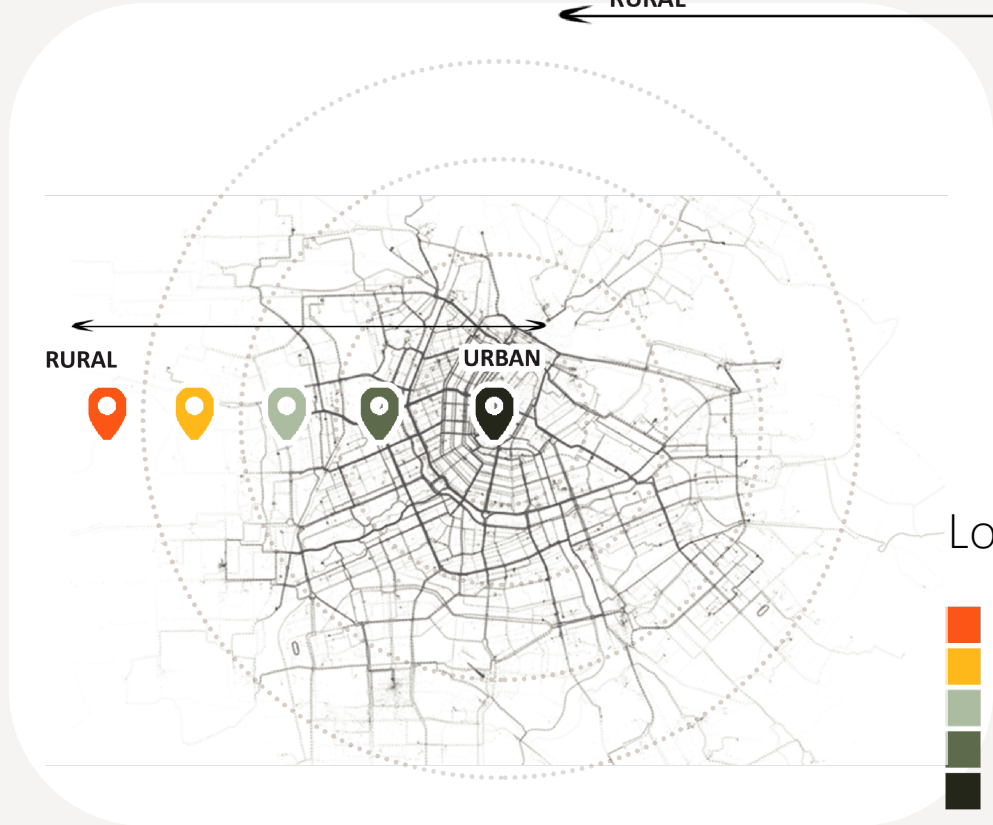
Location | Amenities nearby (walking distance)

The researched
housing preference
attributes



Data collection

Location | City size



Location | Neighborhood characteristics

- Rural
- Village-like
- Quiet Residential Area
- City District
- City Centre



All analyses can be found in the 'Tabulation Publication'

Tabulation Publication

This publication contains the tables and graphs resulting from the survey, conducted in the Dutch language. Tables and graphs are published in the original language. Names of tables and graphs coincide with the variable names in de dataset.

Part of Master Thesis

"A crisis that triggered change; How the Corona crisis impacted (aspiring) homeowners' housing preferences"

A study into possible change of housing preferences of (aspiring) owner-occupiers in the Netherlands resulting from the Covid-19 crisis, as to give insight into the lasting impact on future demand for the housing stock.

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Supervisors TU Delft

First mentor | Sylvia Jansen

Second mentor | Ellen Geurts

Third mentor | Peter Boelhouwer

Board of examiners delegate | Geert Coumans

Graduation Company | Dura Vermeer

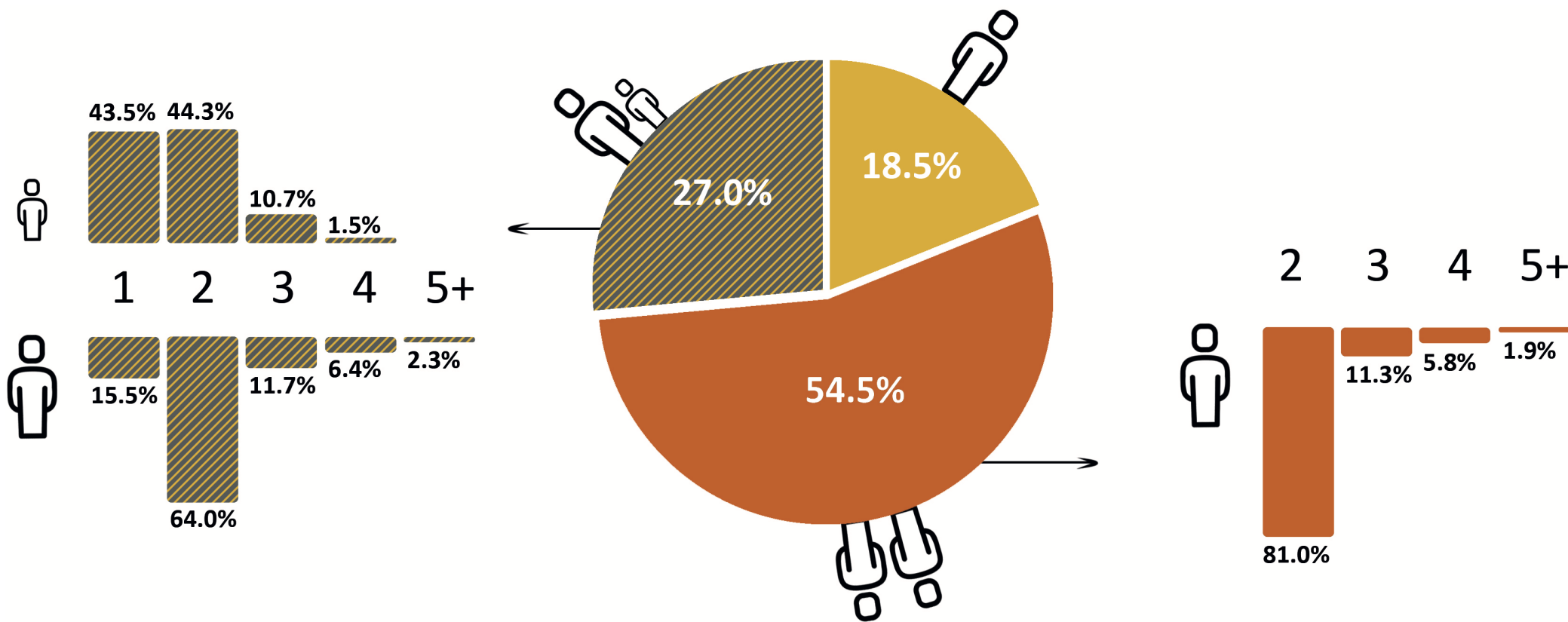
Supervisor | Rink Drost



So, who are the respondents?



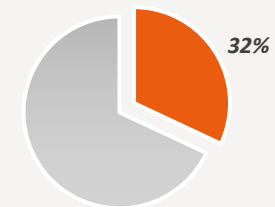
Demographics | Household type



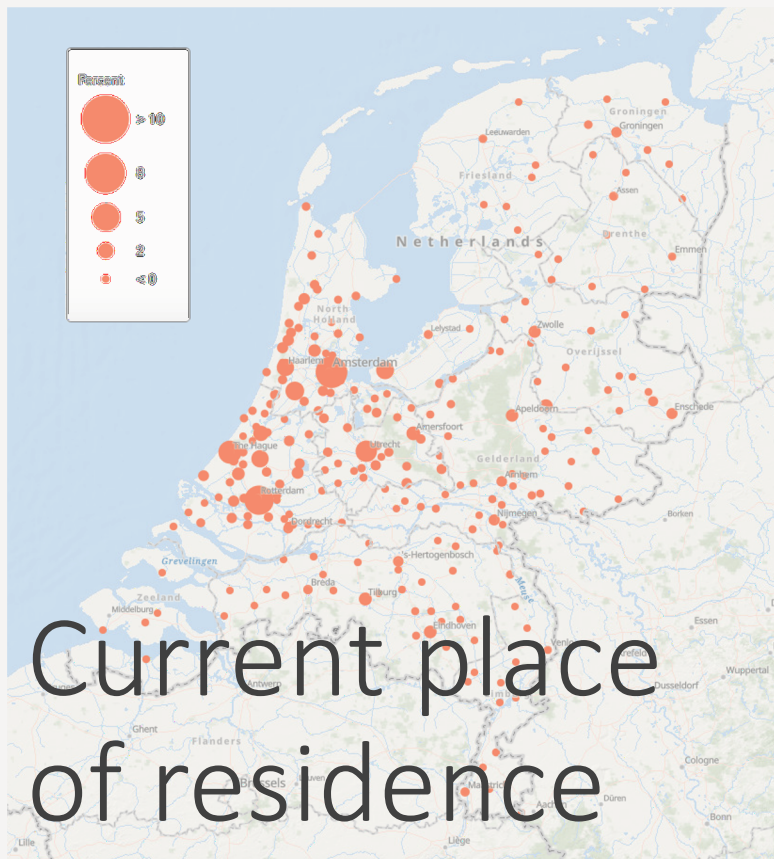
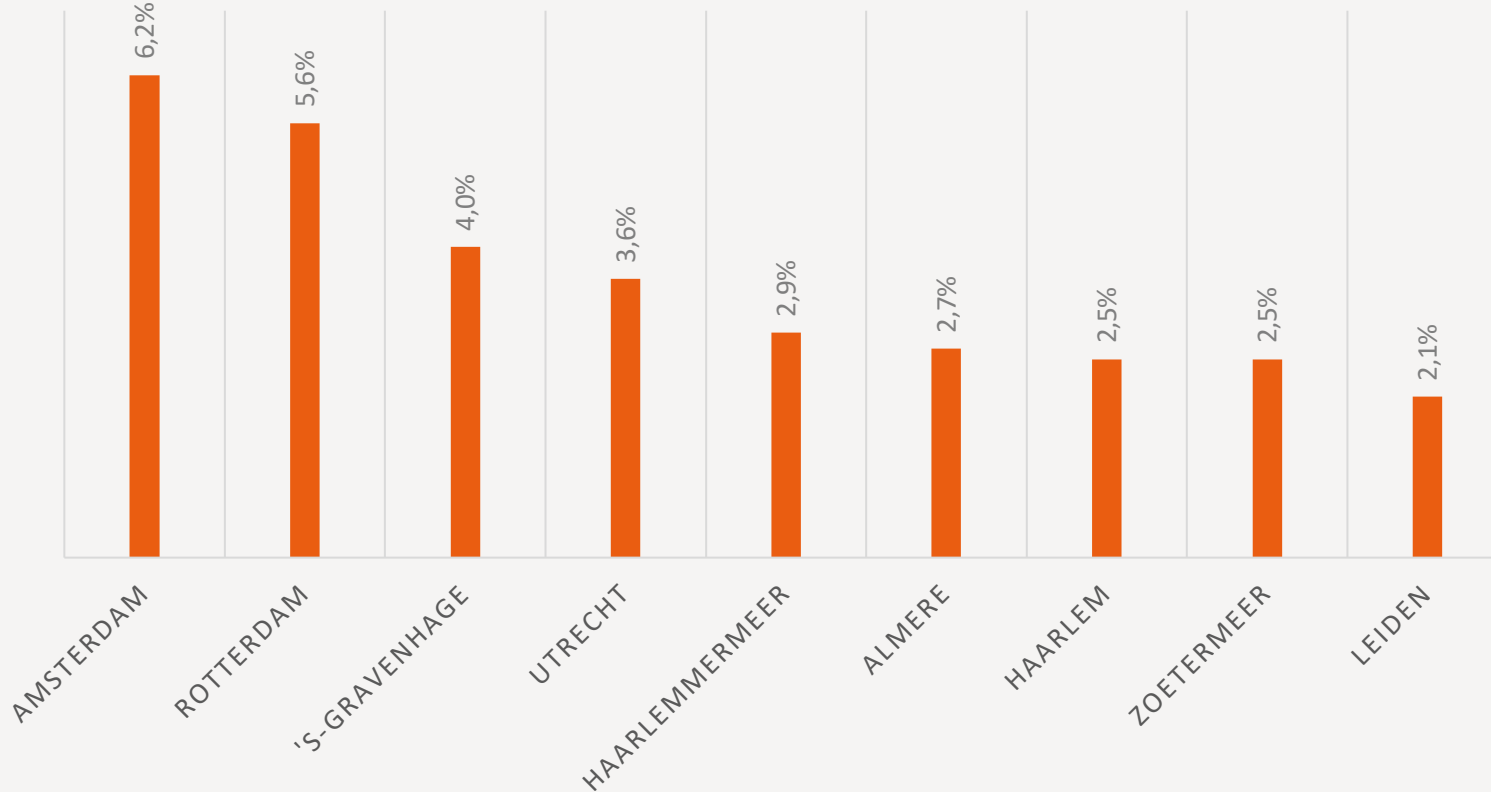


Current place of residence



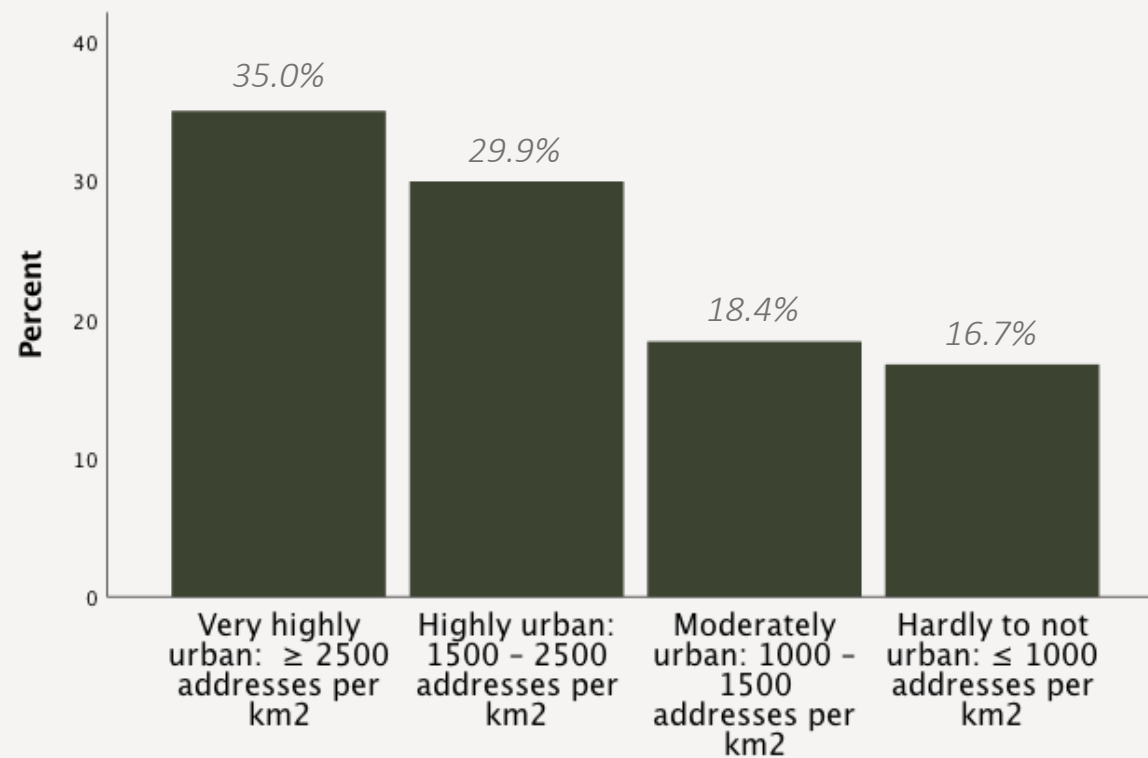


MOST COMMON MUNICIPALITIES



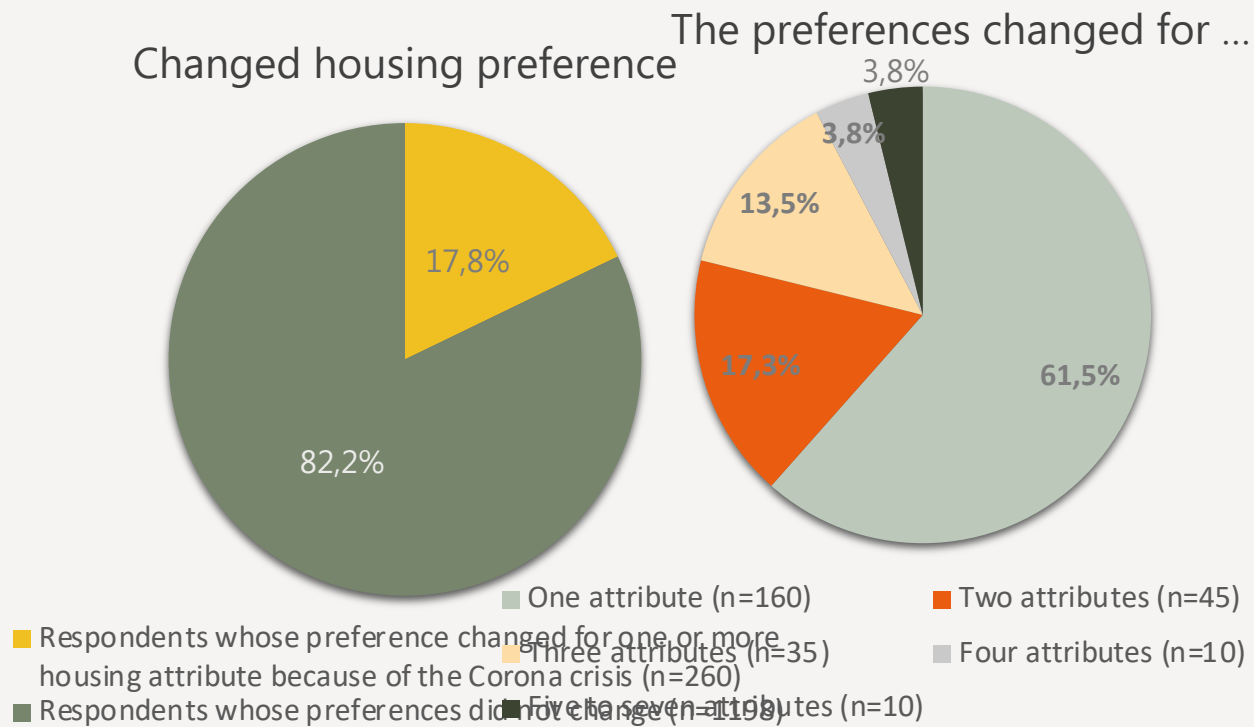


Current level of Urbanity





So, what has been the effect of the Corona crisis on housing preferences?









Which attributes were affected most?

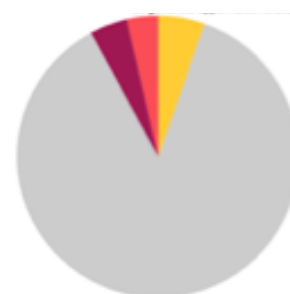


Research Results

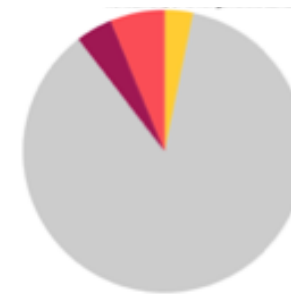
I don't know 
The preference stayed the same 
The preference has changed since the Corona crisis, but not because of the Corona crisis 
The preference changed because of the Corona crisis 



Dwelling type



Dwelling size (m²)



Dwelling size (n rooms)



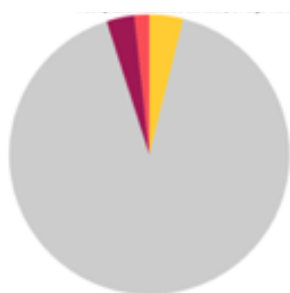
Outdoor space



Price



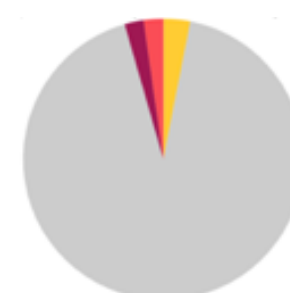
Location; moving distance



City-size



Neighbourhood characteristics



Amenities closeby



Unsatisfaction with dwelling

Requirements

- More rooms
- More space

- Different dwelling types
- Outdoor space (Preferably a garden)

Cause

- Working from home



Unsatisfaction with living environment

Preference

- More tranquility
- More space
- More privacy
- More greenery
- More nature close by

Enabler / cause

- Increased possibility / willingness to move further away from the workplace
- Discovery of new lifestyles (more nature and less amenities).



Preferred Moving distance

Preferred moving distance (Multiple responses possible)	<i>Before</i>		<i>Currently</i>	
Within the current neighborhood	9	16.1%	9	16.1%
Within the current district	9	16.1%	10	17.9%
Within the current municipality	29	51.8%	32	57.1%
To another municipality within the current province	17	30.4%	40	71.4%
To another province	7	12.5%	22	39.3%
To another country	2	3.6%	2	3.6%

Changes in moving distance preferences **caused by** the Corona crisis (n=56).



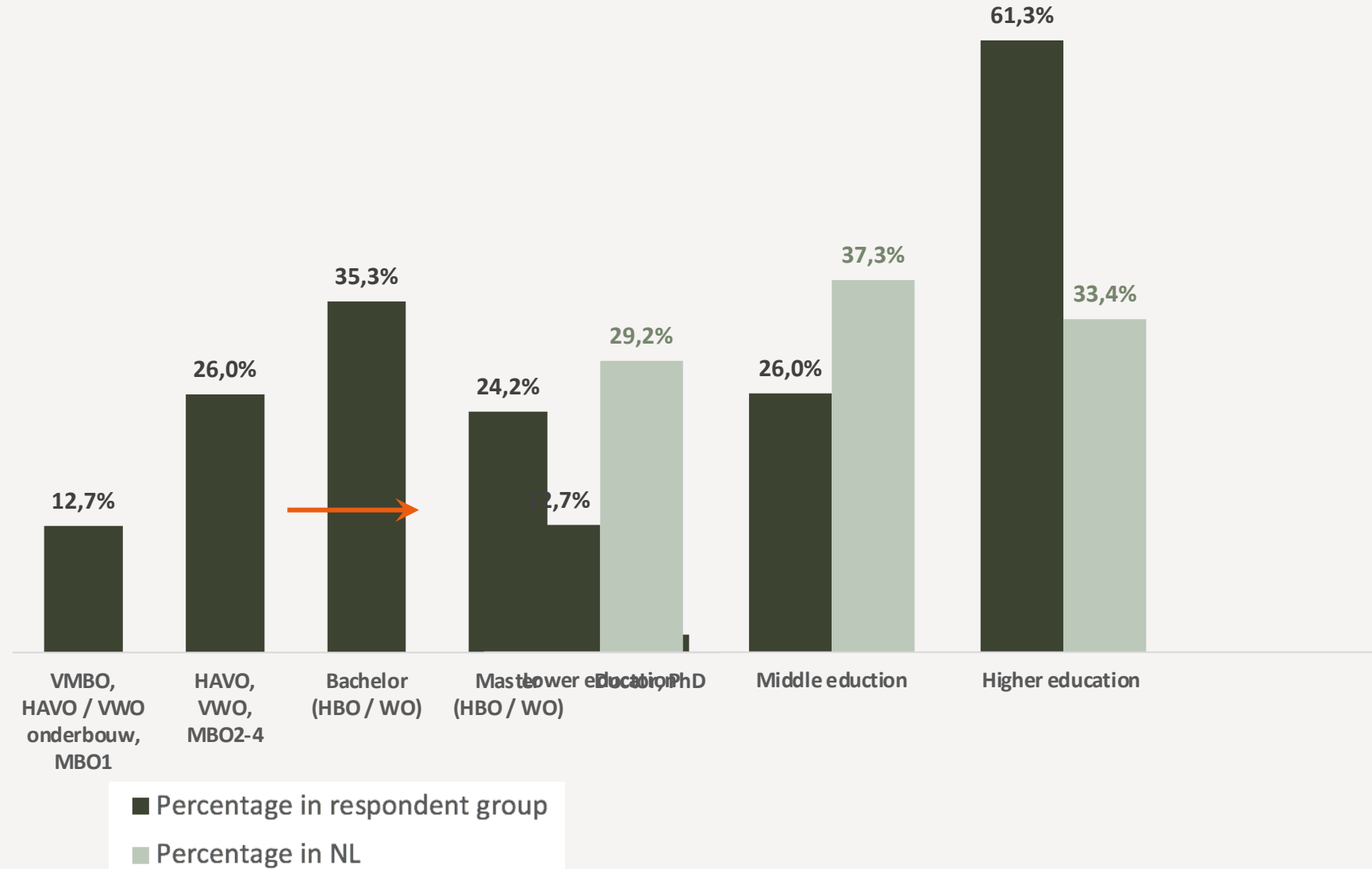
Preferred Moving distance

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Changes in moving distance preferences **caused by** the Corona crisis (n=56).



Working from home | Level of Education

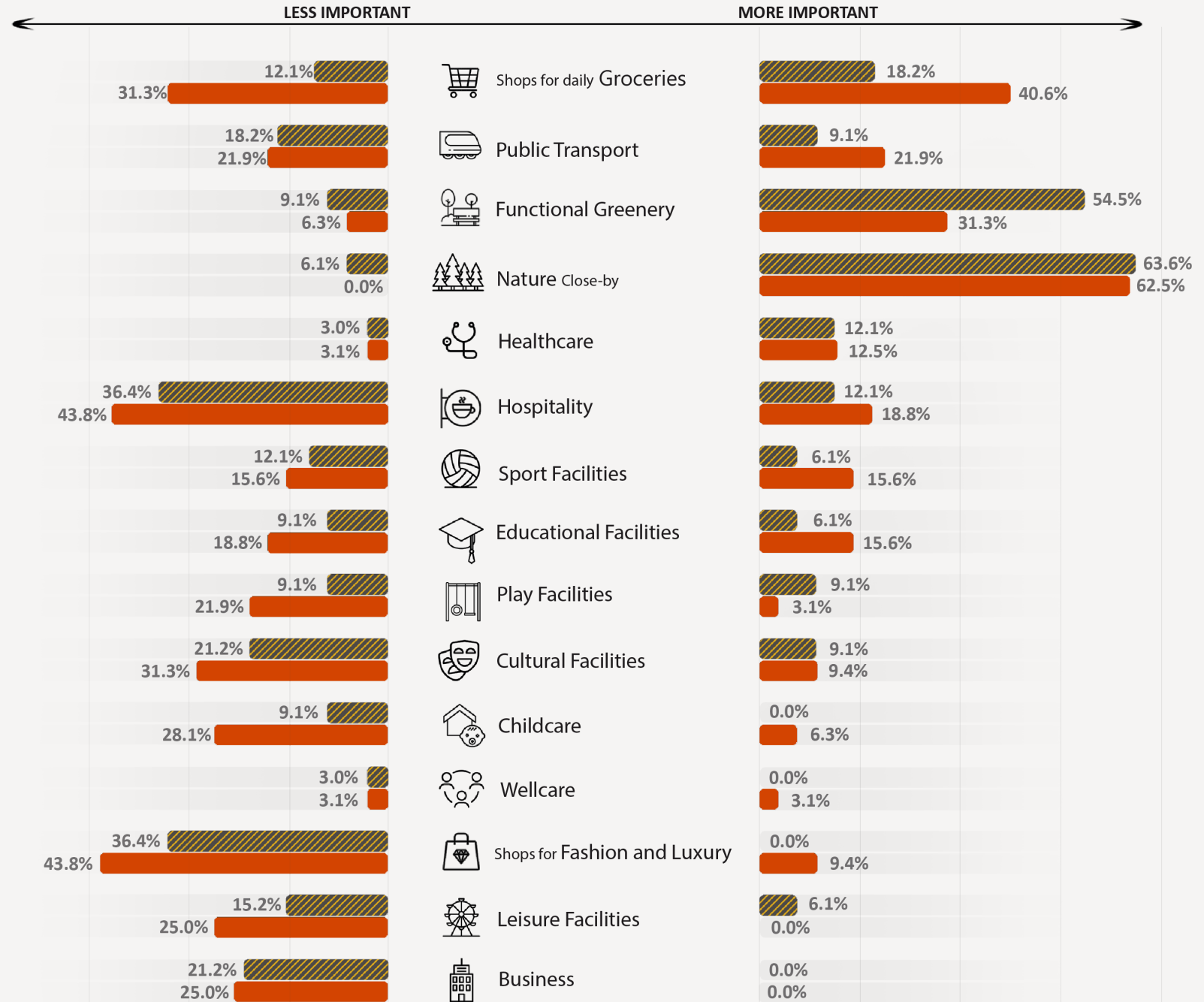
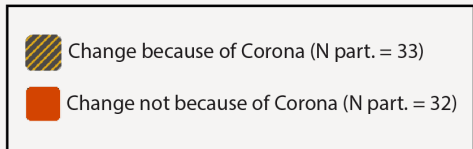




Research Results

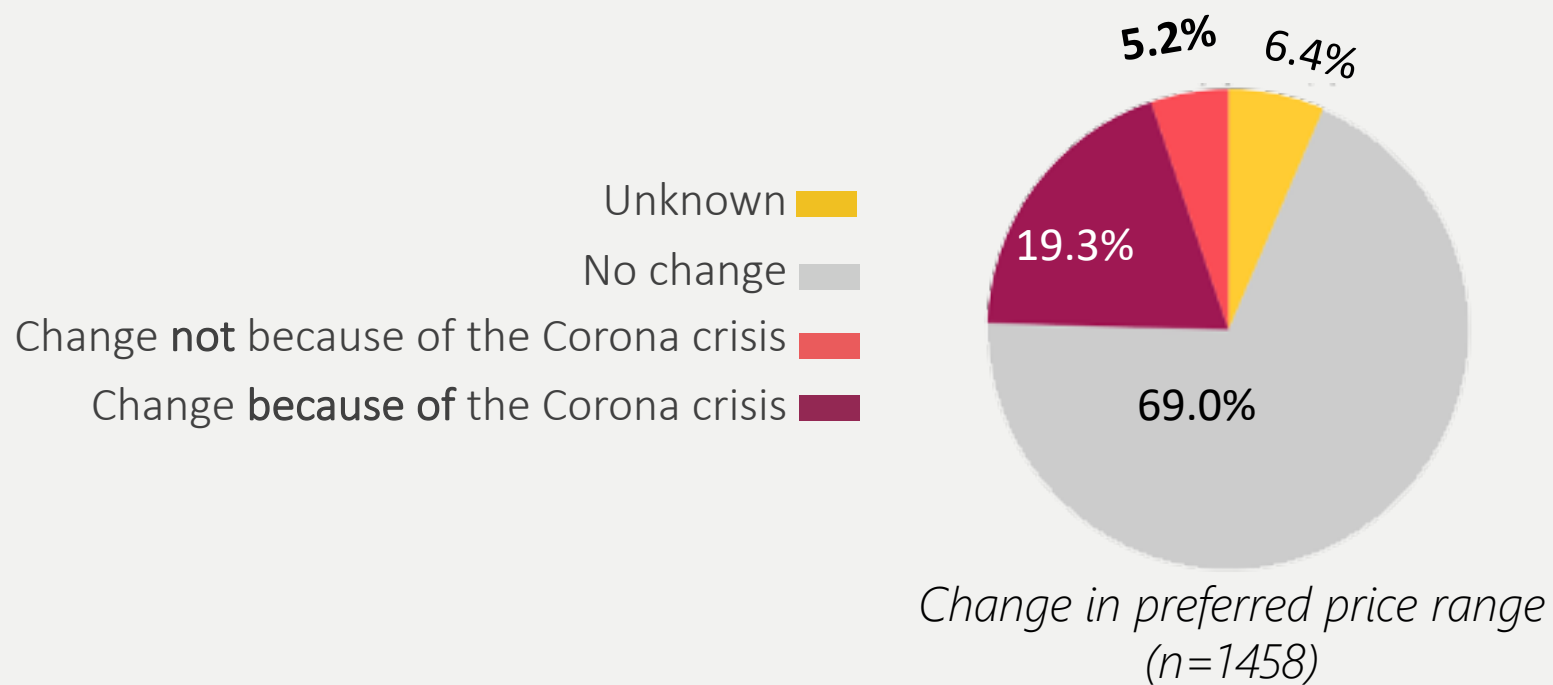
Discovery of new lifestyles:

The change in preferred amenities at walking distance





Changed preferences for the price range





Changed preferences for the price range

<i>Why did the preference change?</i>	<i>The preference has changed since the Corona crisis, but not because of the Corona crisis (n=248)</i>	<i>The preference changed because of the Corona crisis (n=69)</i>
Changing household composition	2.7%	1.4%
More financial possibilities	41.2%	11.3%
Less financial possibilities	4.3%	23.9%
Price increase	46.3%	52.1%
In need of a bigger dwelling	1.6%	8.5%
Other	3.9%	2.8%

Reasons mentioned for the change in price range preferences, differentiated on changes because of Corona and since Corona.



Changed preferences for the price range

<i>Why did the preference change?</i>	<i>The preference has changed since the Corona crisis, but not because of the Corona crisis (n=248)</i>	<i>The preference changed because of the Corona crisis (n=69)</i>
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More financial possibilities	41.2%	11.3%
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Price increase	46.3%	52.1%
In need of a bigger dwelling	1.6%	8.5%
Other	3.9%	2.8%

Reasons mentioned for the change in price range preferences, differentiated on changes because of Corona and since Corona.



Who were affected most?
Differences between the
subgroups



Who were affected?

The Corona crisis affected the preferences of multi person households with children, and the preferences of single person households **more often** than those of the multi person households without children.



Who were affected?

The Corona crisis affected the preferences of multi person households with children, and the preferences of single person households **more often** than those of the multi person households without children. Additionally, preferences of households in highly urban areas are **more often** affected by the Corona crisis than households in hardly to not urban areas.



Who were affected?

Due to the crisis, **multi person households with children** more often changed their:

- Moving reasons,
- Preferred dwelling type
- Preferred price range

Due to the crisis, **single person households** more often changed their:

- Preferred moving distance
- Preferred neighborhood characteristics



Who were
affected?

Due to the crisis, **respondents living in highly urban places** more often changed their:

- Preferred number of rooms
- Preferred price range
- Preferred moving distance



Will it last?

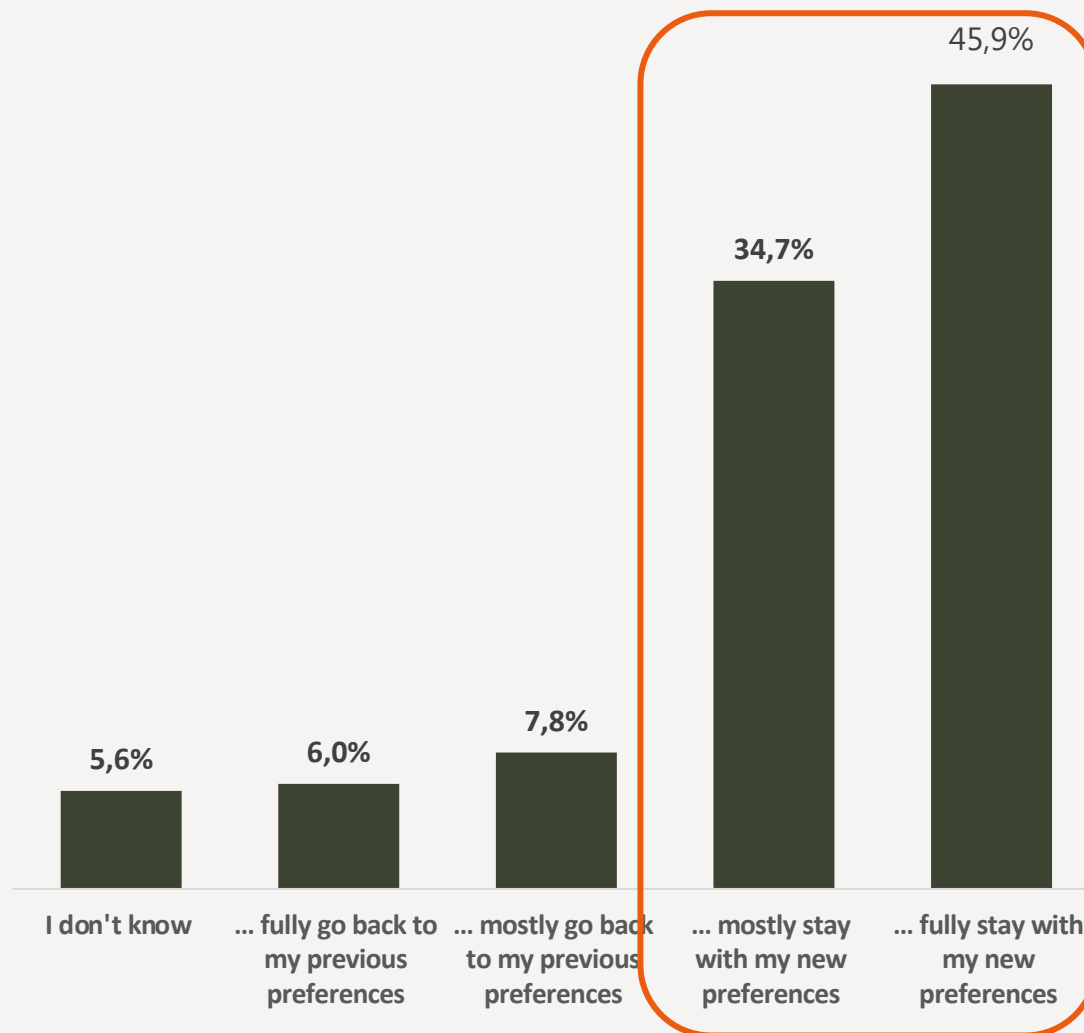
Permanence of the change



Research Results



After the Corona crisis is over, I expect to ...





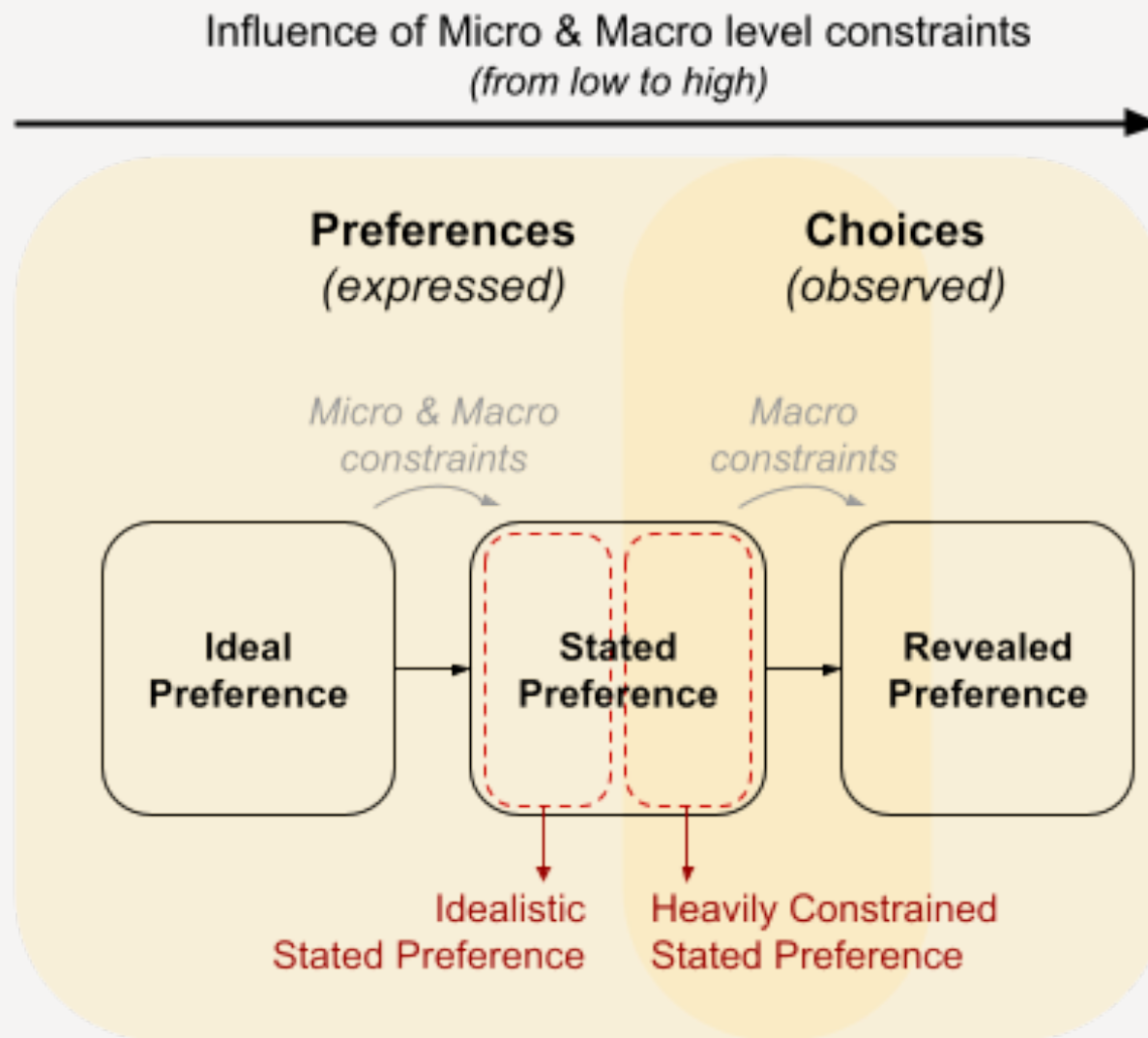
Limitations of the results

- **Caution** with interpreting **expressed** preferences
- **Caution** with interpreting **retrospective** preferences
- The findings and its permanency regards **expectancy** of respondents and thus regard **uncertainties**
- **Discrepancy** between **stated** and **revealed** preferences in the Netherlands
- **Discrepancy** in the level of **ideality** or **reality** of the expressed preferences



Limitations of the results

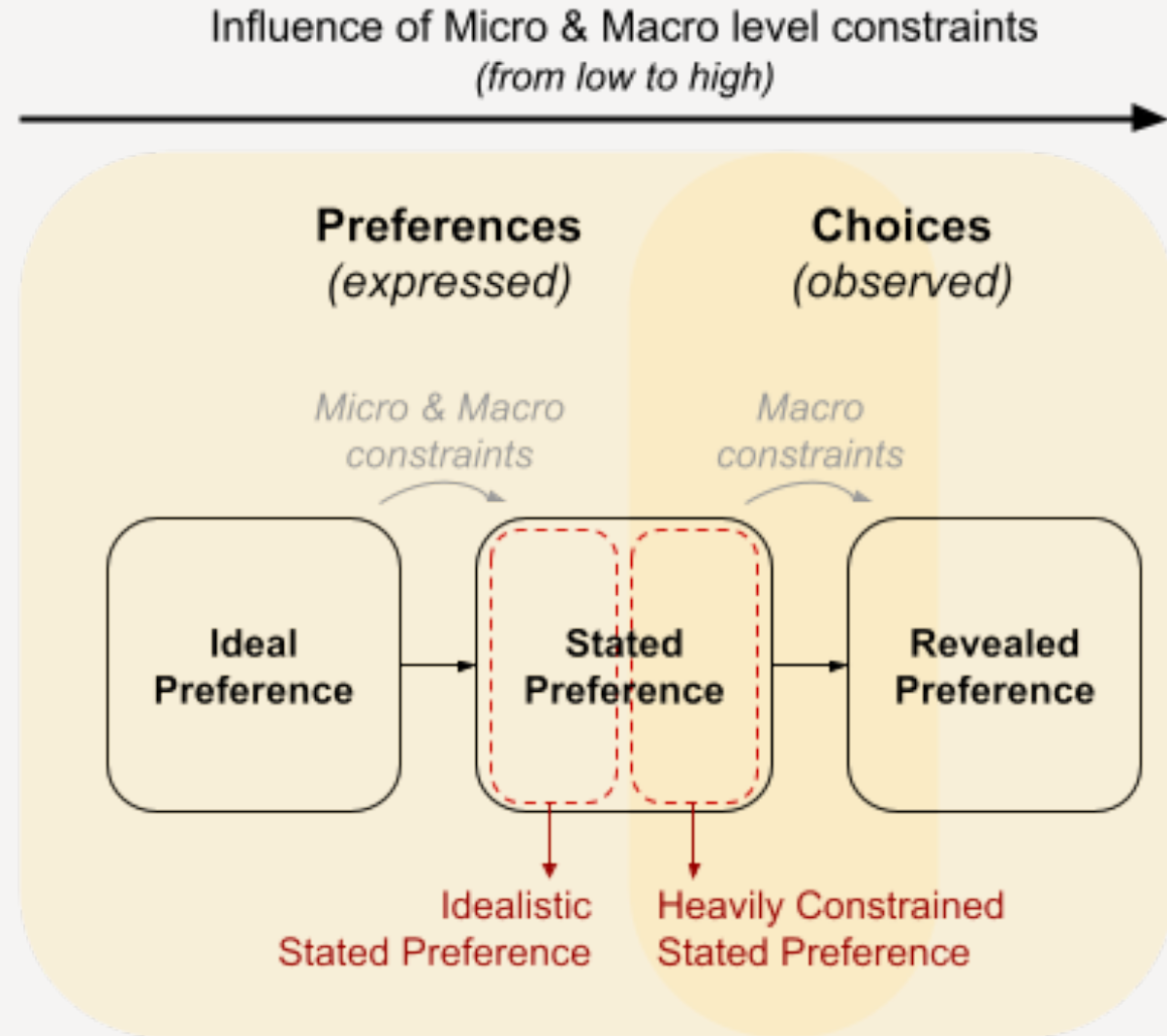
- Discrepancy in the level of **ideality** or **reality** of the expressed preferences





Hidden effect

- **Discrepancy** in the level of **ideality** or **reality** of the expressed preferences
- **Difficulty** in **identifying** Corona as the cause for change in case of **diffuse attributes**

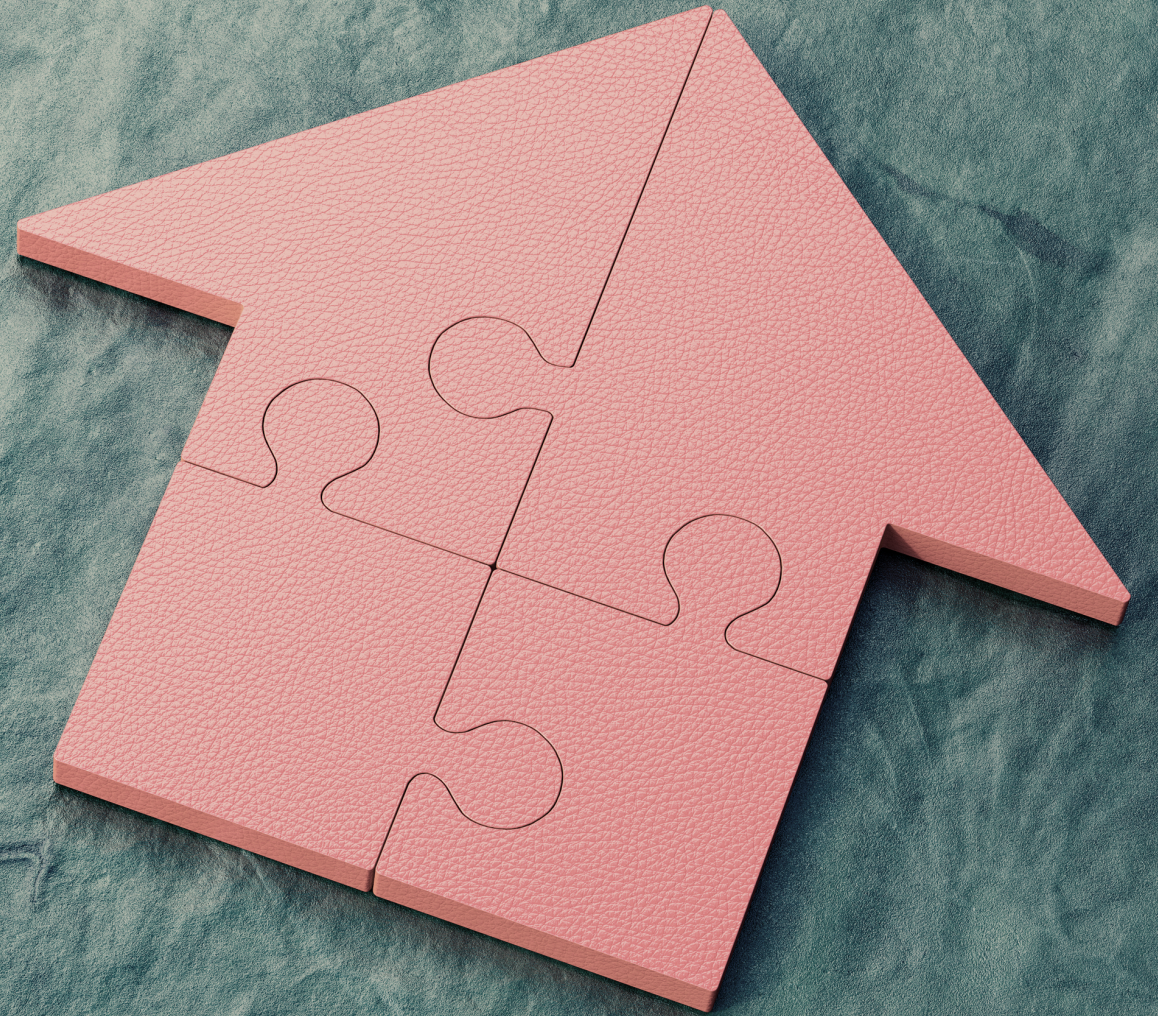




Recommendations

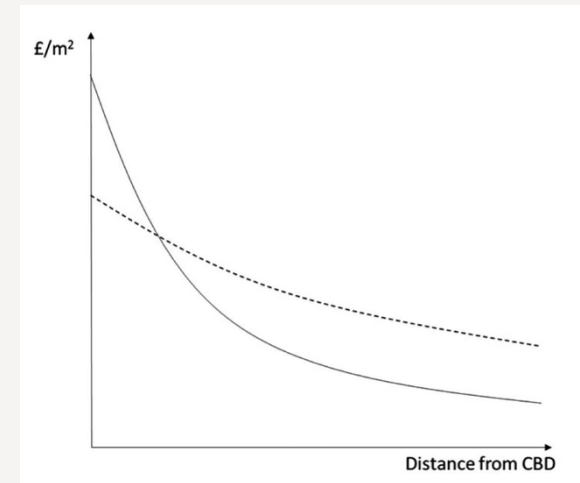
"We will be '*consuming*' our homes much more than in pre-pandemic levels in the foreseeable future, and we will need to *adapt* to some significant and more enduring changes in *how we use our homes* and in our *perceptions of living and working at home.*"

*Nanda, Thanos, Valtonen, Xu, and Zandieh
(2021, p. 1)*



The preferences changed, now supply should follow

- Dwelling layout
- Sound isolation
- Location and environment
- Pricing and location



*Bid rent curves before (solid line) and after (broken line) the Corona crisis.
(Nanda et al., 2021, p. 2)*



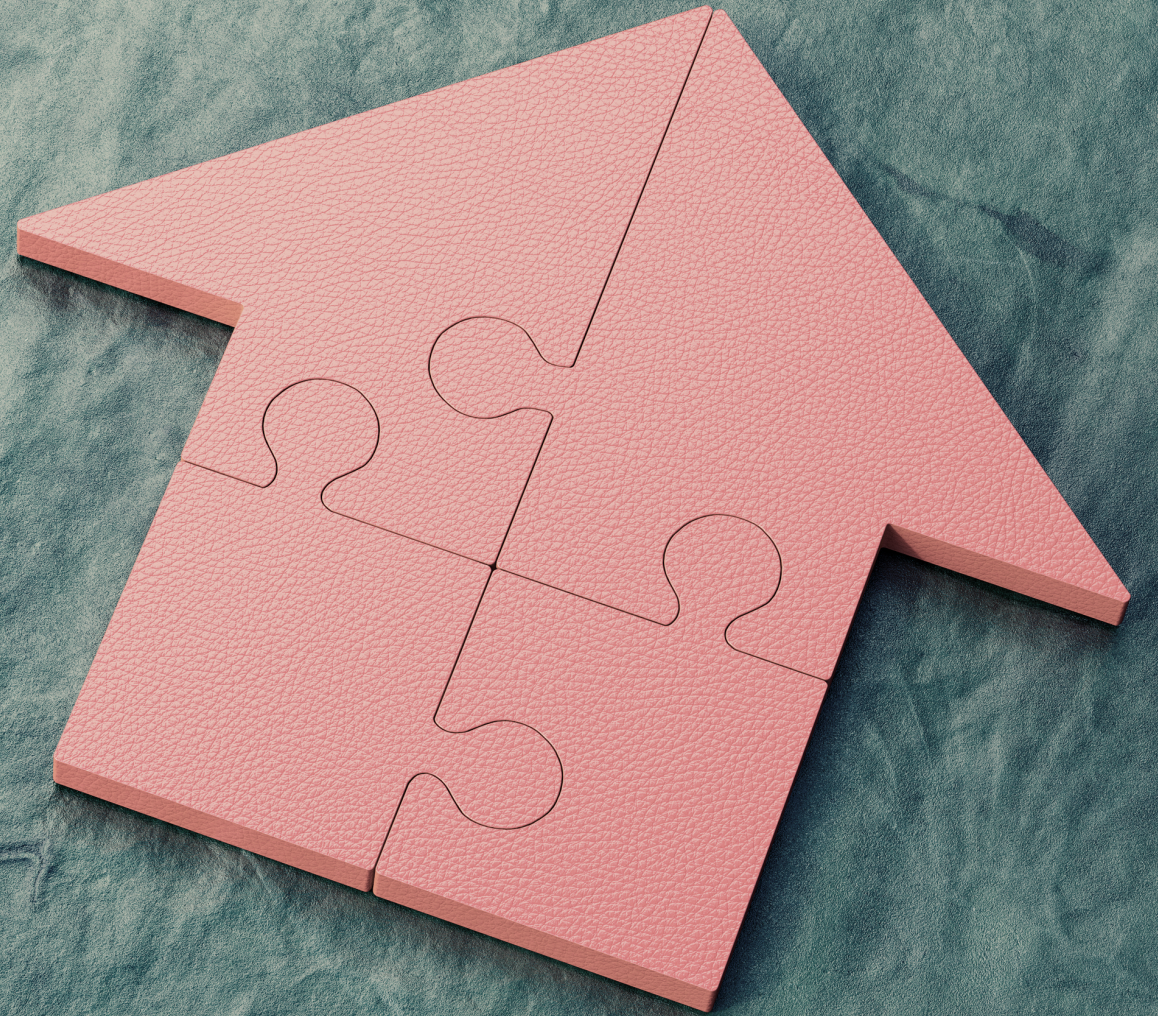
The preferences might change again,
supply should adapt in advance

The “integration of the building hygiene and wellbeing” since “the consequences of the pandemic, and the imminent risk of its repetition, highlight the need to apply a new concept of health, in terms of indoor wellbeing, [...]”

(Daniela et al., 2020, pp. 1-2).

“The COVID-19 pandemic
has made ‘home’ an
absolute focal point of our
lives.”

Nanda, Thanos, Valtonen, Xu, and Zandieh
(2021, p. 1)





Thank you
for your
time and interest



Wrap up



- This thesis researched whether and how stated housing preferences of (aspiring) owner occupiers in the Dutch housing market changed due to Corona.



- The respondents were all inclined to move and were actively looking to buy a house, and thus a stated preference could be measured.
- The research focused on expressed stated preferences, and thus measured the perception of the respondents of how Corona influenced their housing preferences.



- The respondent group consisted of people who have shown an interest in buying a newly built house.
- The respondent group was thus oriented to the newly built housing market.



Wrap up

- Preferences changed for 17.8% of the respondent group.
- The lasting effect is expected to be a change in preferences for 14.3% of the group.
- People want to have the functionality of the extra room.
- People require outdoor space.
- More space, greenery, tranquillity and privacy is required of the living environment.
- People are more willing to move further away.
- Most preference changes relate to working from home.
- Or to a discovery of new lifestyles (more nature and less amenities).
- People in highly urban areas and multi person households with children were affected most.
- The effect of the crisis might be bigger than this survey uncovered.

References

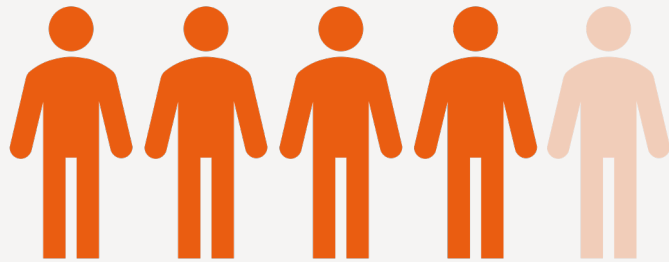
Nanda, A., Thanos, S., Valtonen, E., Xu, Y., & Zandieh, R. (2021). Forced homeward: the COVID-19 implications for housing. *Town Planning Review*, 92(1), 25-32. doi:<https://doi.org/10.3828/tpr.2020.79>

Paling, R. (2020, 11 October). Woongeluk na corona: 'Belegger moet veel gedifferentieerder gaan denken'. *Vastgoedmarkt*. Retrieved from <https://www.vastgoedmarkt.nl/woningen/nieuws/2020/10/woongeluk-na-corona-belegger-moet-veel-gedifferentieerder-gaan-denken-101157515>

Extra slides

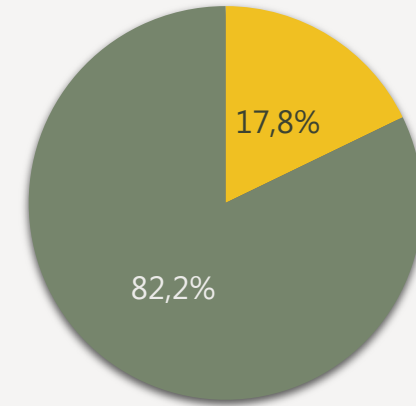


Research Results



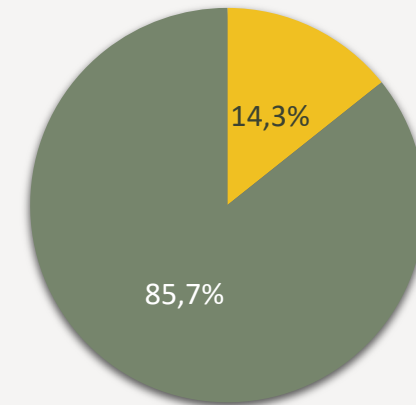
- Respondents whose preference changed for one or more housing attribute because of the Corona crisis (n=260)
- Respondents whose preferences did not change (n=1198)

Changed housing preference



- Respondents whose changed preferences are expected to last – different dwellings required
- Requirements unchanged or uncertain

Lasting changed housing preferences (expectancy)





Unsatisfaction with dwelling | *Wanting more rooms*

<i>Why did the preference change?</i>	<i>The preference has changed since the Corona crisis, but not because of the Corona crisis (n=44)</i>	<i>The preference changed because of the Corona crisis (n=87)</i>
Changing household composition	43.5%	2.2%
Financial reasons	13.0%	2.2%
In need of a workplace	23.9%	88.9%
In need of a place to workout	2.2%	2.2%
Other	17.4%	4.4%

Reasons for the change in dwelling size (n rooms) preferences, differentiated on changes because of Corona and since Corona.



Unsatisfaction with dwelling | *wanting more space*

<i>Why did the preference change?</i>	<i>The preference has changed since the Corona crisis, but not because of the Corona crisis (n=45)</i>	<i>The preference changed because of the Corona crisis (n=45)</i>
Personal circumstances	2.2%	2.2%
Changing household composition	34.8%	4.3%
Financial reasons	30.4%	10.9%
In need of a workplace	13.0%	56.5%
Living in each other's pockets	6.5%	15.2%
Garden / nature	2.1%	6.5%
Other	10.9%	4.3%

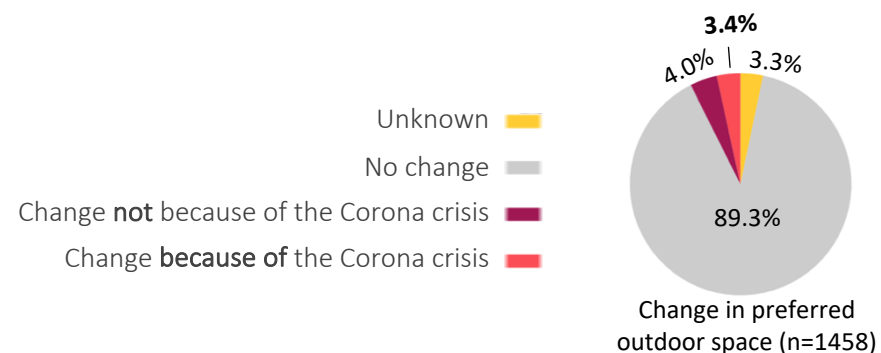
Reasons for the change in dwelling size (surface) preferences, differentiated on changes because of Corona and since Corona.







Unsatisfaction with dwelling

Requirements

- Different dwelling types
- Outdoor space (Preferably a garden)



	<i>Preferred outdoor space (Multiple responses possible)</i>		<i>Before</i>		<i>Currently</i>	
	Preference is a (Bigger) Garden		29	65.9%	40	90.9%
	Preference is a (Bigger) Balcony		21	47.7%	12	27.3%
	Preference is a (Bigger) (Court) yard (Dutch: Erf)		2	4.5%	8	18.2%
	Preference is a (Bigger) (Court)yard (Dutch: Binnenplaats)		1	2.3%	3	6.8%
	Preference is a (Bigger) Patio		1	2.3%	6	13.6%