URBIS

HOUSING AND LAND AUDIT ANALYSIS

Prepared for Fraser Coast Council

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Project code	P0034263
Report number	1

Urbis acknowledges the important contribution that Aboriginal and Torres Strait Islander people make in creating a strong and vibrant Australian society.

We acknowledge, in each of our offices, the Traditional Owners on whose land we stand.

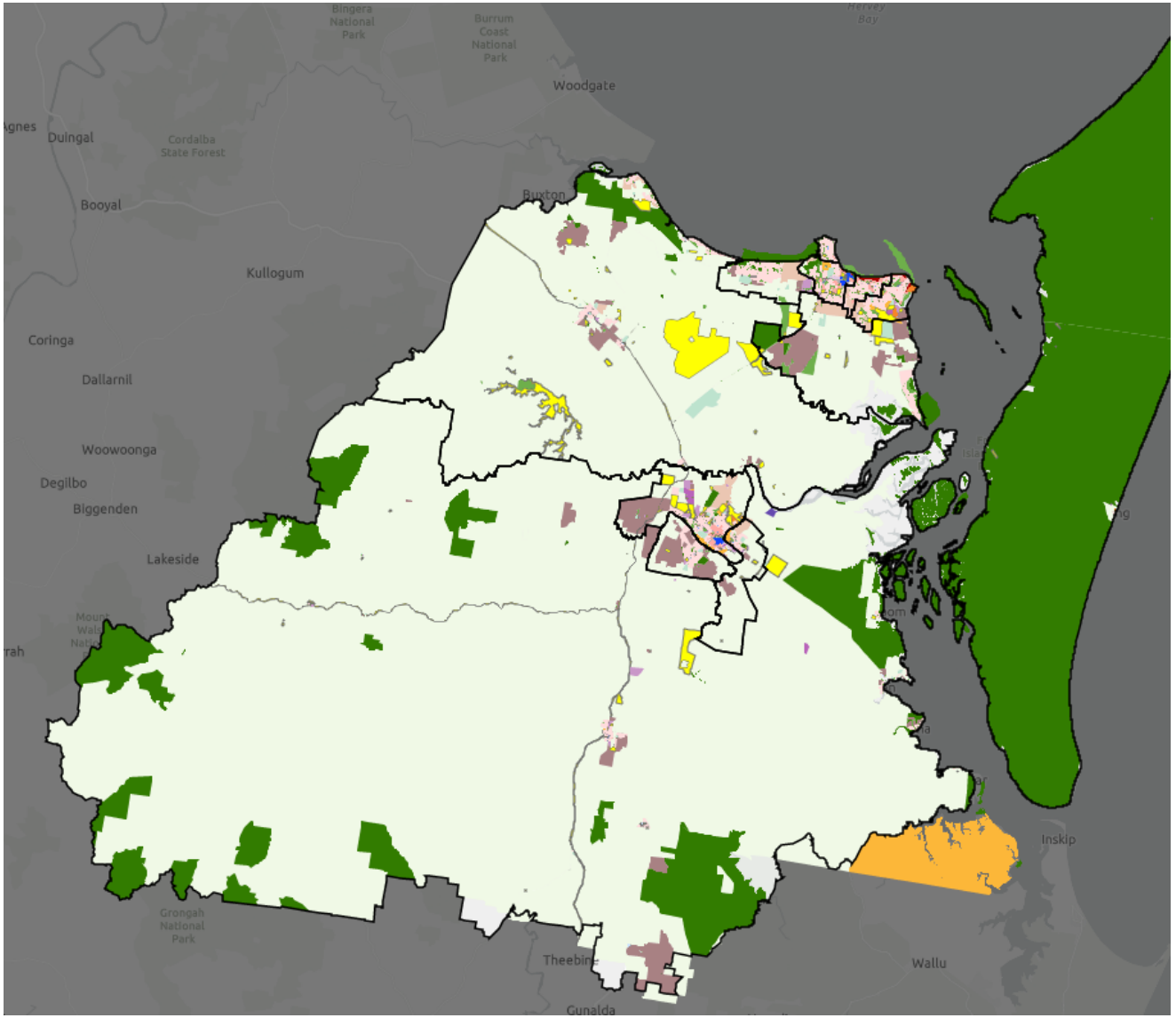
CONTENTS

INTRODUCTION

This report provides a summary of the analysis undertaken as part of Phase 4 of the Housing Diversity and Land Supply Study. Specifically, the outcomes of Phase 4 sought to quantify the existing supply of land and dwellings, as well as the potential future supply of land and dwellings. The following variables and influences have been considered throughout this process:

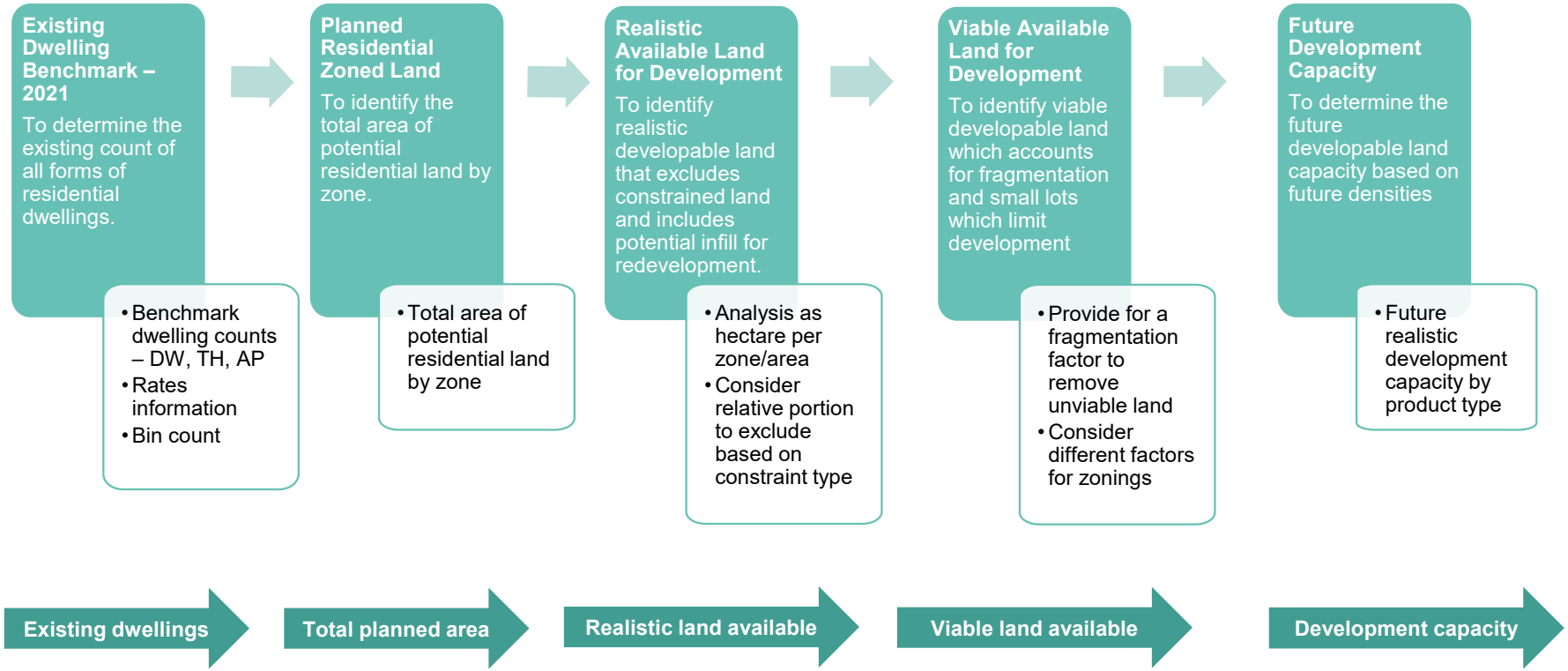
- Dwelling typology/Land use
- Zoning
- Environmental constraints
- Infrastructure servicing
- Fragmentation and small lots
- Existing and future density

Fraser Coast Housing Capacity



METHODOLOGY

In order to undertake the housing land audit, the following methodology was used. For transparency, a detailed inclusion of steps and assumptions is included within the Appendix.



SUMMARY TABLES AND INSIGHTS

FRASER COAST SUMMARY

Dwelling Capacity

Zone/Housing Type	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Available Land	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	Ha	No.
Total	17,795	42,383		2.4	5,460.2	4,085.8	4088.3	16,371
LDR	5,314	31,017			733.5	205.5		
Detached	3,833	29,504	95%	7.7	385.2	38.5	183.6	1,836
Attached	75	1,513	5%	20.3	0.5	0.0	21.9	555
Other	1,406	0			347.9	166.9		
MD	399	4,601			88.0	17.6		
Detached	193	2,124	46%	11.0	57.2	11.4	0.9	9
Attached	45	2,477	54%	54.9	0.1	0.0	16.7	610
Other	161	0			30.6	6.1		
HD	104	1,990			18.2	3.6		
Detached	41	421	21%	10.4	8.7	1.7	0.0	0
Attached	15	1,569	79%	107.7	0.0	0.0	3.5	173
Other	49	0			9.5	1.9		
Rural Res	9,906	4,584			3,184.0	2,615.2		
Detached	6,655	4,522	99%	0.7	1,811.9	1,400.0	2618.0	0
Attached	96	62	1%	0.6	26.8	24.1	0.0	0
Other	3,155	0			1,345.3	1,191.1		
Emerging Community	2,073	191			1,436.5	1,243.8		
Detached	246	182	95%	0.7	184.0	122.6	1172.2	11,132
Attached	9	9	5%	0.9	0.0	0.0	71.7	2,057
Other	1,817	0			1,252.5	1,121.3		

Within Fraser Coast there are almost 42,400 dwellings, which are located across 17,800 hectares of land. When considering constrained land, the realistically available land for development is just 5,460 hectares, of which only 4,086 hectares is viable (not fragmented). At the proposed densities, this equates to a total dwelling capacity of 16,371.

FRASER COAST DEMAND AND SUPPLY

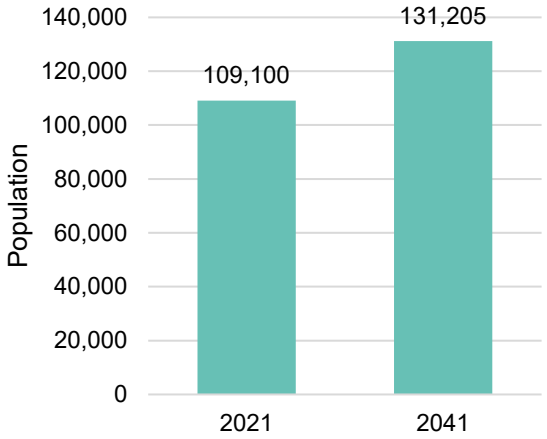
Insights

Under the medium case population series, there are 22,100 new persons projected to live within the region, equating to just over 10,400 new dwellings. With an overall housing capacity of 16,371, there is greater available land than required for detached dwellings.

The high growth population series has a much more aggressive growth rate, increasing the additional persons to just under 35,600 additional residents over the next 20 years. Requirements increase to more than 14,800 dwellings.

Considering the high growth scenario, the capacity within the current zoned land is enough to support future dwellings needs.

Medium Population Growth Series 2021-2041

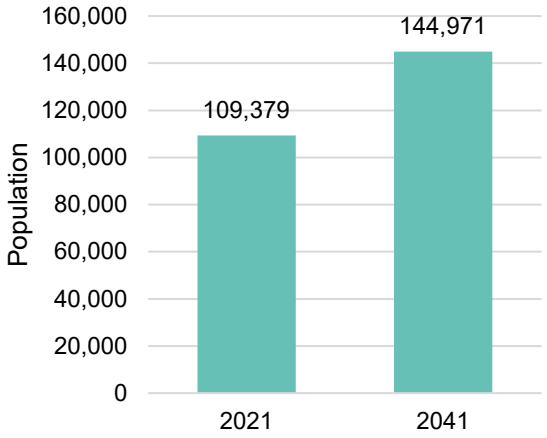


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	22,104
Dwelling Requirements	
Detached	8,738
Attached	1,671
Capacity Surplus*	
Detached	4,239
Attached	1,723

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	35,592
Dwelling Requirements	
Detached	12,462
Attached	2,385
Capacity Surplus*	
Detached	515
Attached	1,009

*Positive figures result in greater capacity of dwellings relative to the required dwellings

MARYBOROUGH REGION DEMAND AND SUPPLY

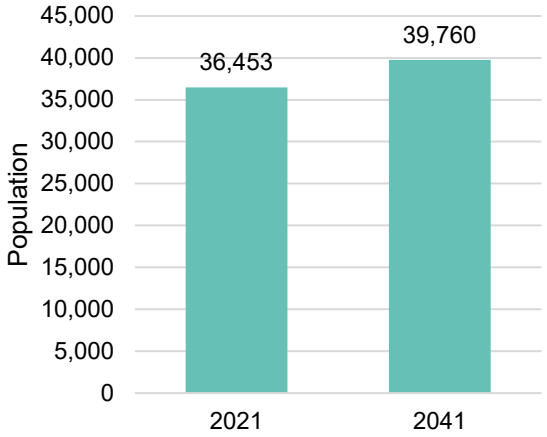
Insights

The Maryborough region is only set to hold 15% of the overall growth under the medium series population growth, equating to just over 3,300 new residents by 2041. With a much lower rate of growth, the capacity for dwellings outperforms the need requirement, particularly for detached homes. This is primarily due to the large areas of Emerging Community zoned land at St. Helens and Granville (as yet developed).

The high growth population series is considerably higher for the region, at more than double the medium series. As a result, the requirement for dwellings is significantly higher (though there remains spare capacity).

There remains significant spare land capacity in Maryborough to cater for projected dwelling needs under the high growth scenario.

Medium Population Growth Series 2021-2041

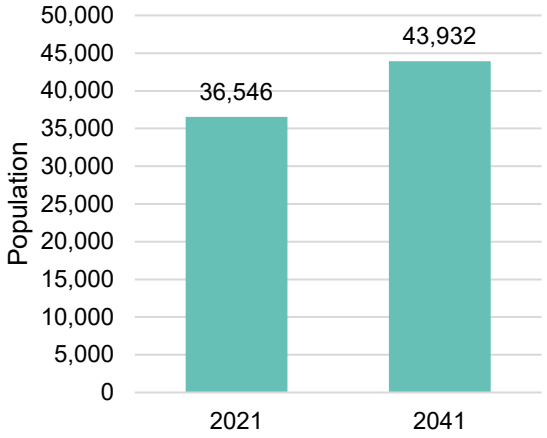


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	3,308
Dwelling Requirements	
Detached	1,303
Attached	174
Capacity Surplus*	
Detached	2,639
Attached	542

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	7,386
Dwelling Requirements	
Detached	2,784
Attached	421
Capacity Surplus*	
Detached	1,158
Attached	295

*Positive figures result in greater capacity of dwellings relative to the required dwellings

HERVEY BAY REGION DEMAND AND SUPPLY

Insights

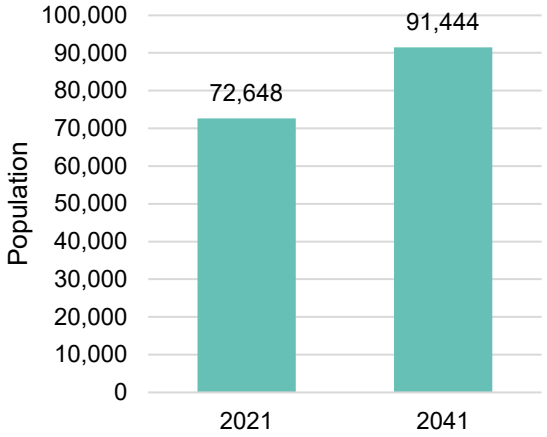
The majority of the growth is set to occur within the Hervey Bay region. Under the medium growth series, there are projected to be an additional 18,800 residents. Under the high growth scenario, an additional 28,200 residents – equating to 11,642 dwellings.

Given the built up nature of a large portion of the region, the bulk of the dwelling capacity is within the Emerging Community zoned areas.

Under a high population series, over the projected 20 year horizon, a deficiency of 643 dwellings is projected.

While this does not equate to an immediate need for expansion areas, there is potential for capacity limits to be reached over the long term, highlighting the need for planning contingencies to be considered.

Medium Population Growth Series 2021-2041

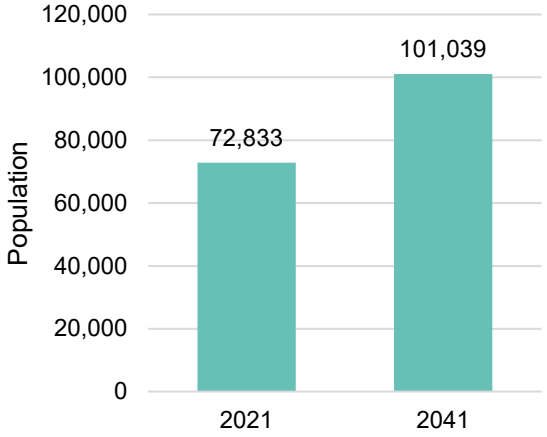


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	18,797
Dwelling Requirements	
Detached	7,435
Attached	1,497
Capacity Surplus*	
Detached	1,600
Attached	1,182

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	28,206
Dwelling Requirements	
Detached	9,678
Attached	1,964
Capacity Surplus*	
Detached	-643
Attached	715

*Positive figures result in greater capacity of dwellings relative to the required dwellings

SUMMARY AUDIT INSIGHTS

Long term growth on the Fraser Coast has trended at 1.1% annual growth between 2010-2020. A significant regional growth expansion, in response to COVID population shifts, has resulted in a significant uplift in recent years. It remains to be seen if this increase will be sustained. While over the long-term, growth may revert to the historical trend, more permanent demographics shifts is an outcome that should be considered. A prudent response to forward land use planning would be to cater for the high series growth projections to properly plan for elevated growth over the next 20 years – especially as the Fraser Coast has a significant affordability advantage over other SEQ coastal LGAs. Accordingly, this land use audit and capacity assessment is based on the QGSO's high level growth projections (estimated at 1.5% annual growth).

In assessing land capacity of within the Fraser Coast, the base principles from the SEQ land supply monitoring program have been adopted in terms of excluding constrained land with additional local factors applied to account for existing developed land, land available for infill development and yield-reduction due to fragmentation (see Appendix A for the methodology details). From the Realistically Viable Land (aggregate land assessed as being potentially suitable for development), the following development densities have been applied to existing residential zoned areas to determine realistic future development capacity:

Low Density Residential (LDR)	Detached: 10 dw/ha
	Attached: 15-30 dw/ha (location dependent)
Medium Density Residential (MDR)	Detached: 10 dw/ha
	Attached: 30 dw/ha
High Density Residential (HDR)	Detached: 10 dw/ha
	Attached: 50 dw/ha
Emerging Community (EC)	Detached: 10 dw/ha
	Attached: 30 dw/ha

These are reasonable and realistic density allowances considering the local Fraser Coast built form typology - being standard residential subdivision at 800m2 allotment size for the bulk of the LDR and EC zoned area and modest densities for multiple dwelling development in MDR zoned areas equating approximately to one unit per 250m2 of developable site area. These are very low density allowances in comparison to SEQ LGAs and reflect realistic factors regarding market demand and resident expectations for the Fraser Coast lifestyle

Considering the Fraser Coast overall, under the high growth population series an additional 14,850 dwellings are required over the next 20 years. This is assumed to be split 12,450 to detached residential subdivision and 2,400 to attached residential product. This represents an approximate 85% - 15% spilt between detached and attached product delivered over the next 20 years. This compares to the existing 90-10 split in the existing and recent built form typology.

Overall, the capacity assessment results in a net surplus of 1,450 dwellings – leading to the base assumption that no net expansion of the urban footprint is required to service projected growth requirements. This outcome relies on a modest increase in the delivery of infill and emerging community attached residential product. While there is an overall net surplus, individual areas do have more specific supply and demand considerations.

Development at Fraser Coast is naturally split between the Maryborough and Hervey Bay sub-regions. In understanding this split, the various statistical areas (SA2s) that make up the Fraser Coast have been allocated to each region with the supply/demand dynamic collated for each sub-region.

The Hervey Bay region dominates with 78% of projected growth over the next 20 years. Under the high growth series, this is projected as 11,650 dwellings spilt 9,700 (83%) to detached dwellings and 1,950 to attached (17%). The capacity assessment leads indicates a balanced supply and demand equation (a nominal surplus of 72 dwellings). With the substantial weighting to detached dwellings – that typology is projected to have a minor deficit of 640 dwellings (balanced by the projected surplus attached capacity).

Conversely, with the comparatively minor growth projected for Maryborough, an additional 3,200 dwellings will be required – split 2,780 (87%) detached and 420 (13%) attached. With the significant undeveloped Emerging Community growth areas at St Helens to the north of Maryborough, there is a significant projected surplus of 1,450 dwellings. A preferred development outcome would be to achieve a proportion of this attached project within infill development sites in proximity of the CBD.

SUMMARY AUDIT INSIGHTS

While overall, the Hervey Bay and Maryborough Regions are adequately served by the existing zoned land, within each of the SA2 assessment areas, there are local supply and demand factors to consider. Forward growth projections over 20 years will be sensitive to local supply and demand factors – with the resulting outcome being that projected growth in under supplied areas is likely to be directed to other areas that are not similarly supply constrained.

Therefore, while there is high confidence in the overall supply and demand assessment for the Fraser Coast not requiring increases in the urban footprint (based on modest land efficiency targets), individual areas will require more specific considerations to deliver sufficient dwelling supply required to meet projected local demand. This is most prevalent within some of the Hervey Bay oriented areas.

Booral River Heads: Given this area takes in the major expansion growth front of Nikenbah, the QGSO growth projections of 388 people are inadequate and out of step with actual development underway. This area is expected to continue strong development growth and will far outstrip projections and fully develop the estimated capacity of 2,605 dwellings. In doing so, it will consume growth that is projected to occur in other coastal SA2 areas.

Burrum Fraser: This large SA2 incorporates the coastal towns of Burrum Heads and Toogoom, the rural townships of Howard and Torbanlea and the large rural area to the northern limits of Maryborough. The Emerging Community zoned land at Burrum Heads provides the bulk of the capacity for this SA2. The majority of this area is covered by existing approvals and additional capacity will be limited by coastal hazard constraints. It may be that the projected growth in this coastal area (leading to an estimated deficit of 690 dwellings) will be curtailed over the long term and that projected growth will occur elsewhere – in planned growth areas such as Nikenbah (Booral-River Heads SA2). The Howard and Torbanlea rural townships lack infrastructure and supporting urban services for a specific growth focus – though changing industrial development in the area may influence residential growth pressures.

Point Vernon: A dwelling deficit of 346 dwellings is projected. Given the area is so well established and is constrained by the coastline, there are minimal areas for expansive development. To deliver on the projected growth targets, development is suggested to be focused on suitably scaled pocket infill in areas where older stock and/or large allotments currently exist and would be suitable for redevelopment.

Torquay – Scarness – Kawungan: The SA contains considerable Emerging Community growth precincts within a growth corridor to the south of the Pialba CBD along with the core coastal residential precinct between Pialba and Urangun. Projected high growth demand within mature suburbs result in a projected deficit of 840 dwellings (detached – oriented to the Emerging Communities zone) and 751 dwellings (attached – split between infill and density with the EC zone). It is therefore considered imperative to maximise the development yield from the Emerging Community zoned land and encourage infill development in this location if forecast growth is to be met.

Craignish – Dundowran: This SA2 covers the existing developed coastal suburb of Craignish and includes a significant Emerging Community area in Dundowran. Growth within the SA is heavily reliant on the coastal EC zoned area where virtually all growth is projected. The area provides a large dwelling surplus with a total projected surplus of 1,210 dwellings. The EC zone has an existing preliminary approval for a significant coastal oriented community – however it is noted that the approval has been in force for some time without commencement. Should this location not proceed (due to commercial or coastal environmental matters) the project growth will need to be provided elsewhere on the Fraser Coast.

Pialba – Eli Waters: The Pialba SA2 is projected to hold a sizable population growth with capacity split between infill areas within LDR-HDR zones and EC zoned land to the south of the Pialba CBD. Under the high growth scenario, a capacity deficiency of 1,050 detached dwellings is identified. It will be important to maximise development yield from existing developed land through infill development in this location if forecast growth is to be serviced. The new Pialba CBD masterplan should be leveraged for additional surrounding infill development as a priority.

SUMMARY AUDIT INSIGHTS

While an overall consideration of land capacity supply and demand leads to the conclusion that no specific fringe expansion is recommended for the urban footprint, it is clear that individual SA2 areas (mainly within the growth areas of Hervey Bay) do rely on infill development for a significant portion of projected dwelling demand. This will require a focus on infill growth initiatives through the planning scheme with consideration of other mechanisms.

While the projected shift from an approximate 90%-10% to 85%-15% product split between detached and attached represents a modest shift to the existing product mix – current market dynamics indicate that a mix of deliberate policy initiatives will be required to enact this change. The strategic framework will be one initiative that will be required to be buttressed by other planning scheme provisions that calibrate an emphasise toward infill and density (such as zone and use codes, local area plans and planning scheme policies). Other initiatives that reinforce this approach outside of the planning scheme should also be part of the policy mix consideration – such as positive development incentives, possible cost disincentives, private industry partnering and industry collaboration on product mix and design standards.

Engagement feedback from industry has been insightful to gain a local market perspective. Two clear points have emerged that require a strategic response:

I. Existing market product is not meeting the modest projected densities as allowed for within the capacity audit. It was recommended that LDR detached densities of 8 dw/ha should be used to match the market expectation for large lots. For MDR density, an allowance of 15 dw/ha was recommended – reflecting overall densities achieved in lifestyle villages (the only current product that is representative of higher density development).

II. The Emerging Community zoned land does the majority of the "heavy lifting" for supply delivery. These are larger lots identified for expansive growth but significant portions of these areas may be at risk of family land banking, speculative approvals for market value only with no intent for development or being unable to be developed due to environmental or feasibility concerns (Dundowran EC land).

In response, it is recommended:

A sensitivity assessment be undertaken as part of Stage 5 of this program that assesses the impact on land capacity should future development be limited to current market product in terms of typology and density. This will be termed the "business as usual" scenario.

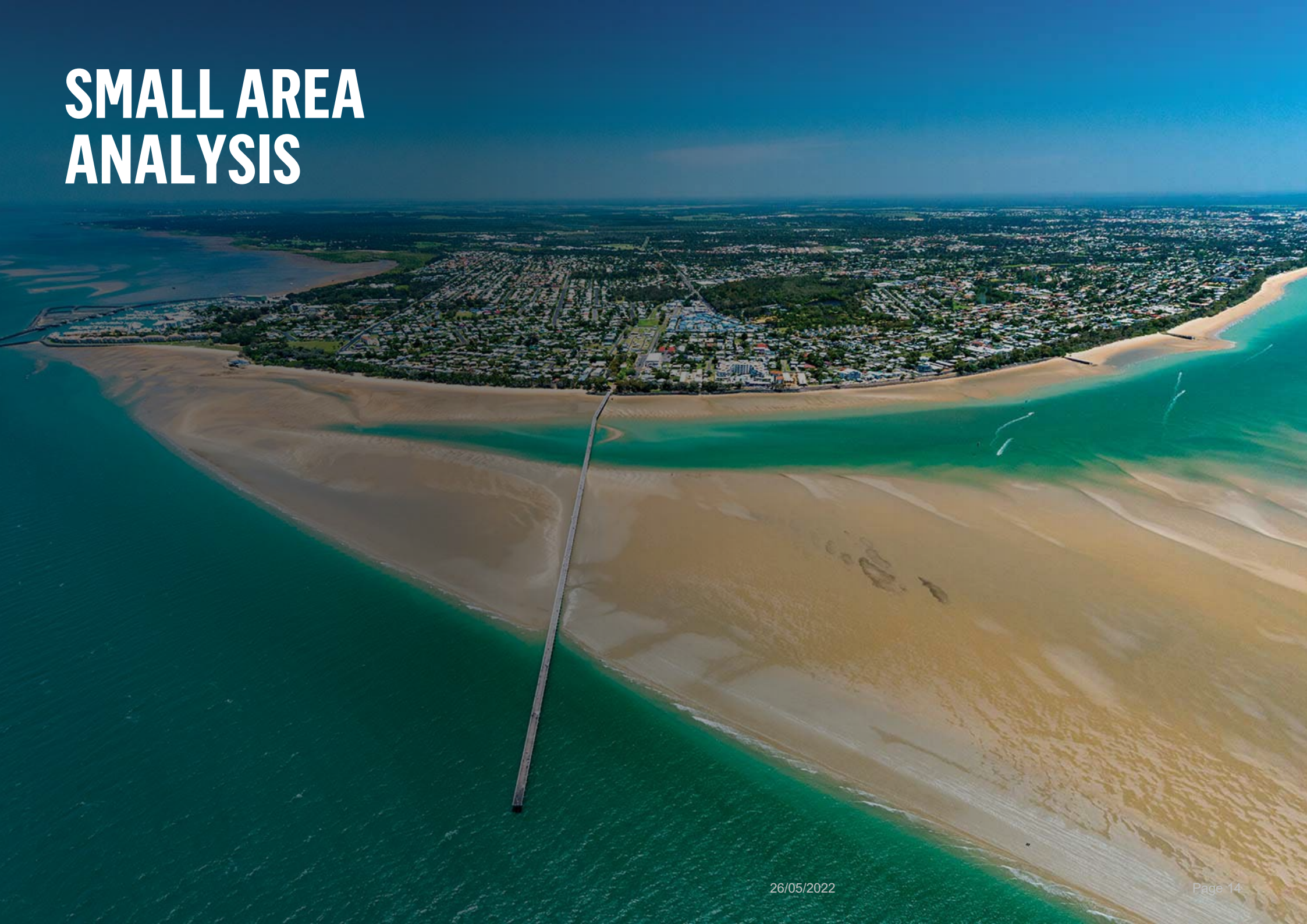
This will be compared to outcomes derived should a more considered and deliberate approach be take to efficient use of developable land – delivering modest density, infill and diversity improvements (as modelled within this report.

The costs and benefits of each approach will be identified with the resulting strategic framework recommendations based on the identified preferred approach.

The risks associated with large areas of identified Emerging Community land not being brought to market are acknowledged. While the theoretical capacity assessment indicates sufficient land is available (considering the high growth scenario), prudent planning requires an allowance be made at the strategic framework level for additional expansive growth should be need arise. It is proposed to identify two preferred areas for expansion and nominate them as investigation areas. It would be intended that these areas are only considered for residential expansion based on a demonstrated need and only when holistic structure planning has been completed (complete with infrastructure servicing plans).

A focus of future growth is a modest level of infill development. This is intended to be located in proximity to centres within Hervey Bay and Maryborough. Infill growth investigation areas will be spatially allocated according to the desired scale of development. It is clear the propensity for mid to high rise development is limited to the Esplanade precinct of Hervey Bay – between the Pialba CDB and Urangan Harbour precincts. Lower scale infill development is preferred within the balance of the centre oriented suburban precincts.

SMALL AREA ANALYSIS



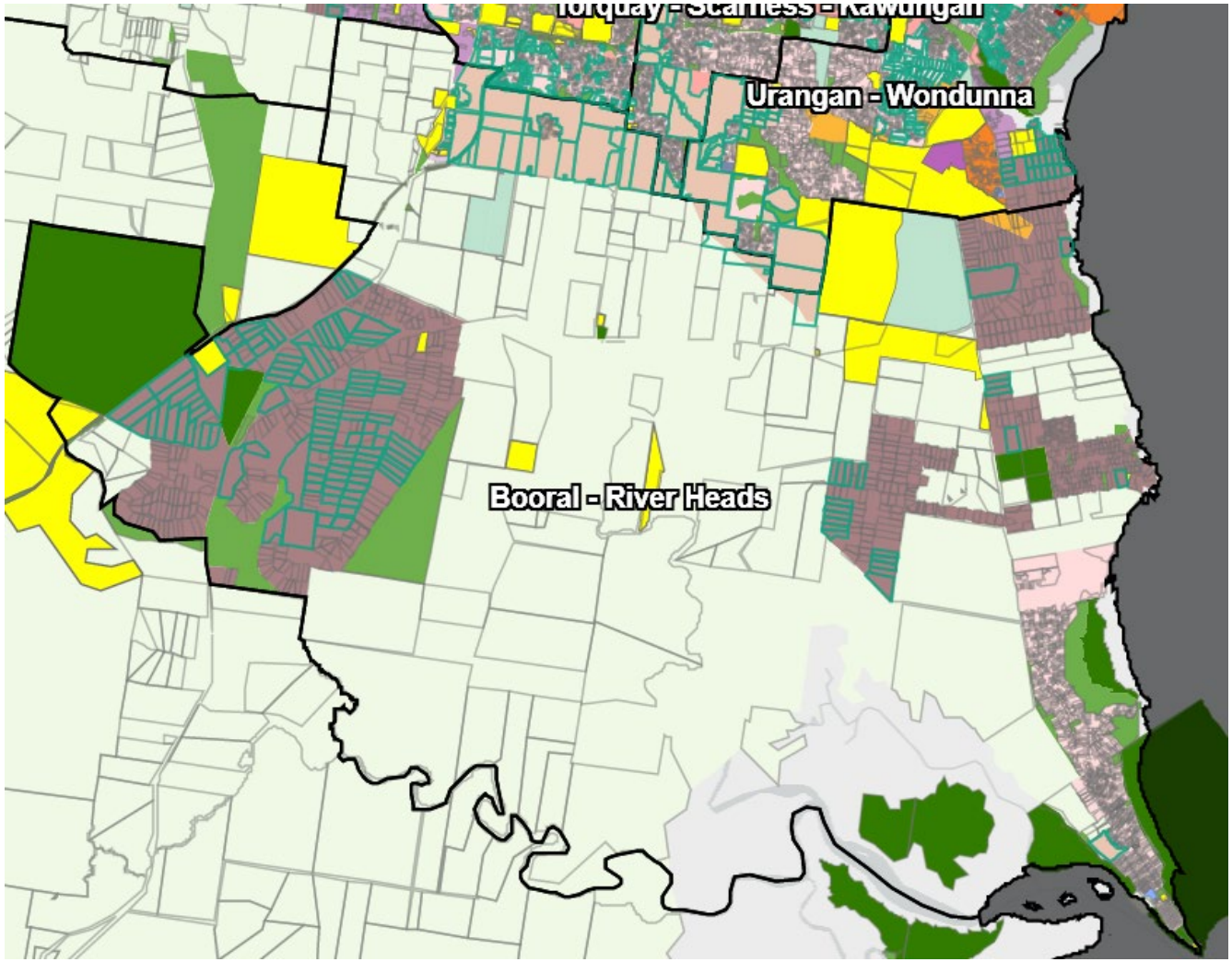
BOORAL – RIVER HEADS

Summary

Booral – River Heads is characterised by largely rural residential land and emerging community land. Rural Residential lands border the area to the west and east and is largely developed into large residential allotments. River Heads is to the south-east and comprises the areas low density residential land.

To the north and adjacent to the established residential land is a large area of Emerging Communities land. This is a major growth area of Fraser Coast and is expected to house a large number of dwellings moving forward.

Map of Available Land



BOORAL – RIVER HEADS DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	2,977	999			272.2	236.9				2,605
LDR	378.7	905								
Detached	183.2	897	99.1%	4.9			95%	0.0	10.0	0
Attached	0.1	8	0.9%	115.3			5%	0.0	15.0	0
Other	195.5									
Rural Res	2,276.3	989			532.9	396.7				
Detached	1,870.8	947	95.8%	0.5	414.9	290.5	100%	396.7		0
Attached	62.2	42	4.2%	0.7	16.2	14.6	0%	0.0		0
Other	343.3		0.0%		101.8	91.6				
Emerging Community	321.8	94			272.2	236.9				
Detached	30.4	94	100.0%	3.1	20.4	10.2	95%	225.0	10.0	2,250
Attached							5%	11.8	30.0	355
Other	291.4				251.9	226.7				

As noted, within Booral Heads – River Heads, the majority of development will occur within the Emerging Community land to the north. There is 237ha of this land which is available for development after considering constraints and fragmentation.

If the densities and typology proportions are adjusted, the dwelling capacity increases. When considering 5% of the market as attached, and increasing densities. The dwelling capacity increases to 2,605. There is therefore much greater capacity if consideration is given to the density, and the area has more potential to continue as a major growth area of Fraser Coast.

BOORAL – RIVER HEADS DEMAND AND SUPPLY

Insights

Under the medium case population series, there is just 388 new persons projected to live within the area, equating to 146 dwellings.

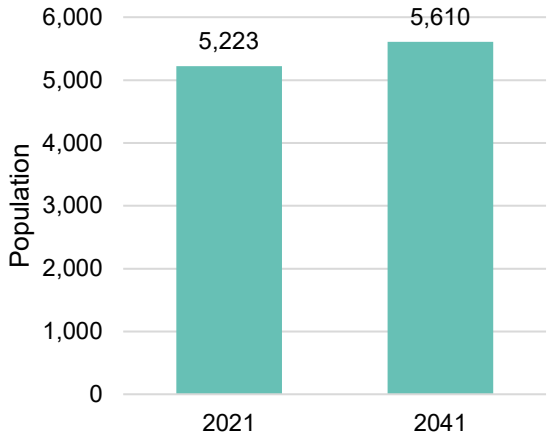
The high growth population series has a more aggressive growth rate, increasing the additional persons to 963 over the next 20 years. Requirements increase to more than 360 dwellings.

Even in the high growth scenario, the QGSO projections will fall well short of the actual growth achieved – due to the substantial area of Emerging Community zoned land and the current level of development activity.

Given the large areas of Emerging Communities land available, there is considerable potential to increase dwelling supply well beyond projected growth levels.

With an overall housing capacity of 2,605 and current activity levels observed (through approvals and commencements on ground) – it is likely that this area will be consumed over the long term and planning contingencies considered. It remains important however to ensure that development in this area remains efficient and supplies a degree of product diversity.

Medium Population Growth Series 2021-2041

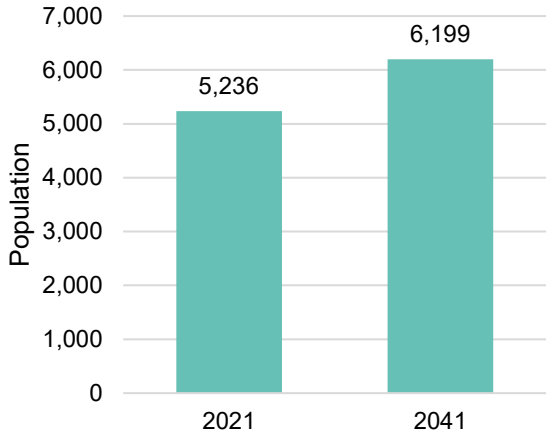


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	388
Dwelling Requirements	
Detached	144
Attached	2
Capacity Surplus*	
Detached	2,106
Attached	353

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	963
Dwelling Requirements	
Detached	357
Attached	6
Capacity Surplus*	
Detached	1,893
Attached	349

*Positive figures result in greater capacity of dwellings relative to the required dwellings

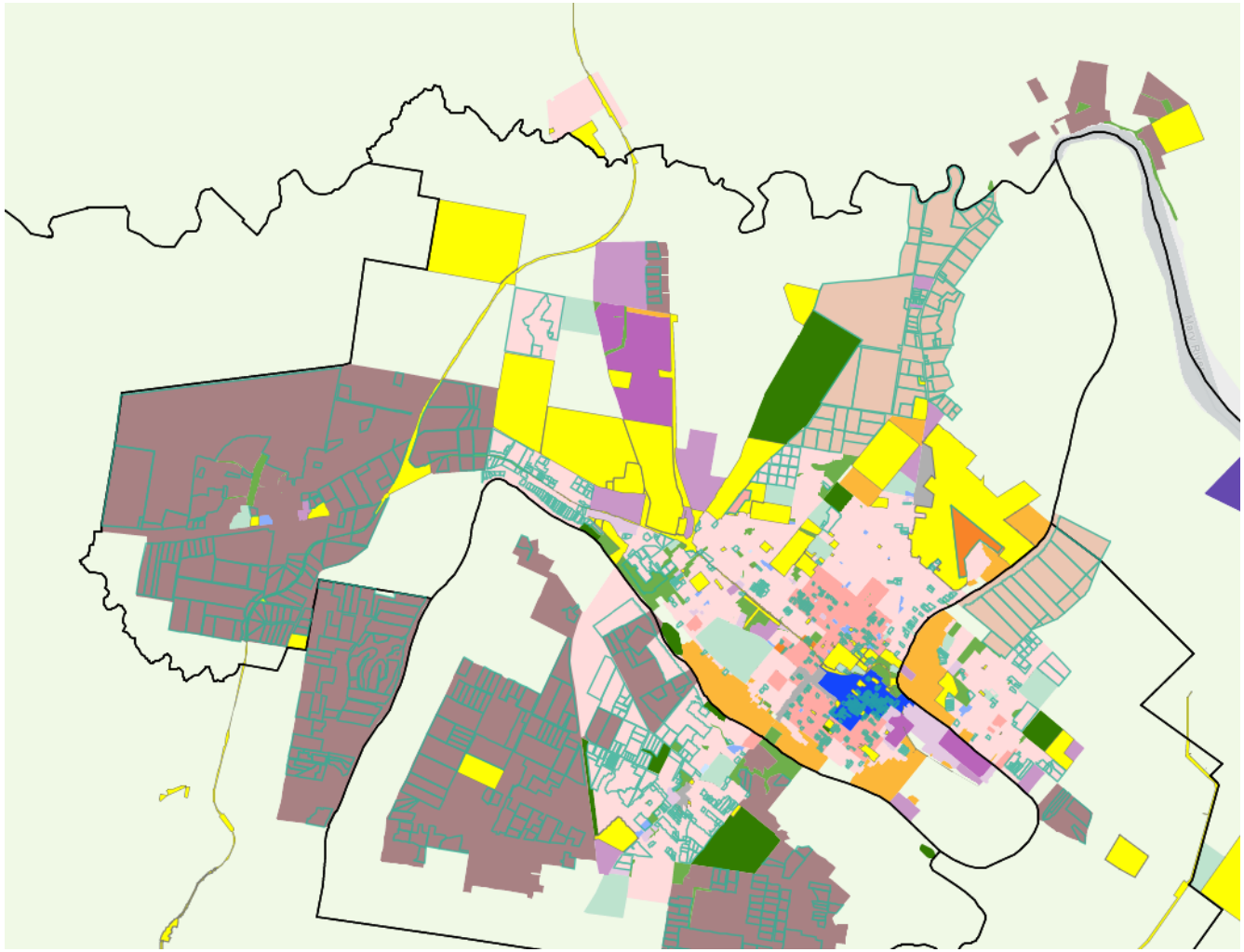
MARYBOROUGH

Summary

Maryborough is one of the main townships within the region. Therefore, the SA2 features the broad spectrum of zoning with the main principal centre to the east, and rural residential lands to the west.

The residential zones provide a radius around the centre, with medium density surrounding the principal centre, and densities declining alongside the zones further out. To the north, there are large areas of low density zone, which are generally improved by large detached lots.

Map of Available Land



MARYBOROUGH DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	1,227	7,011			489.5	327.4				3,654
LDR	590	4,841			135.8	43.8				
Detached	470	4,593	95%	9.8	60.3	6.0	100%	43.8	10.0	438
Attached	7	247	5%	34.1			0%	0.0	15.0	0
Other	113				75.6	37.8				
MDR	150	2,123			25.4	5.1				
Detached	113	1,401	66%	12.4	18.2	3.6	0%	0.0	10.0	0
Attached	15	722	34%	48.0			100%	5.1	30.0	152
Other	22				7.2	1.4				
Rural Residential	885	486			424.8	319.3				
Detached	695	484	100%	0.7	315.0	220.5	100%	319.3		0
Attached	11	2	0%	0.2	10.6	9.5	0%	0.0		0
Other	179				99.2	89.3				
Emerging Community	487	48			328.3	278.5				
Detached	127	42	88%	0.3	84.9	59.4	95%	264.6	10.0	2,646
Attached	5	6	13%	1.1			5%	13.9	30.0	418
Other	354				243.5	219.1				

As noted, there are large areas of available land which are zoned low density, and emerging communities. With majority of this land available and viable, the dwelling capacity does remain high. Overall, there is capacity for an additional 3,654 dwellings, of which majority are expected to be located within the emerging communities zone.

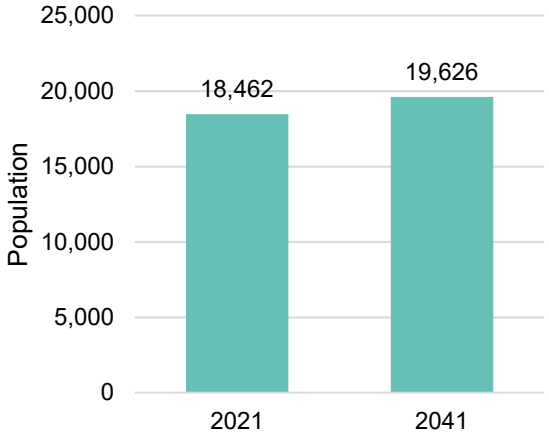
MARYBOROUGH DEMAND AND SUPPLY

Insights

Under the medium case population series, Maryborough may see almost 1,200 new residents, equating to 526 dwellings. With an overall housing capacity of 3,654, there is greater available land than required. The high growth population series has a much more aggressive growth rate, increasing the additional persons to 3,176 over the next 20 years. Requirements increase to more than 1,433 dwellings.

However, given the large areas of Emerging Communities land available with the potential to increase density, there is still capacity for more dwellings than required.

Medium Population Growth Series 2021-2041

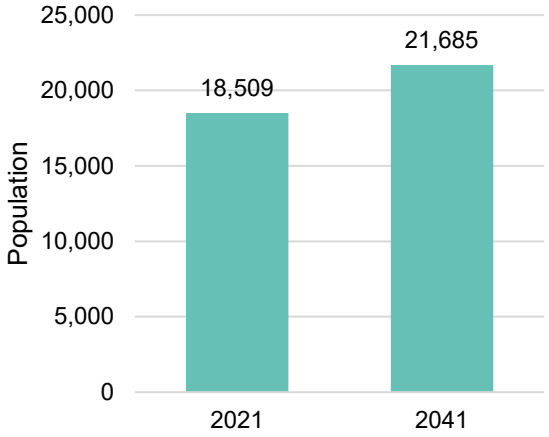


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	1,164
Dwelling Requirements	
Detached	413
Attached	113
Capacity Surplus*	
Detached	2,671
Attached	457

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	3,176
Dwelling Requirements	
Detached	1,127
Attached	306
Capacity Surplus*	
Detached	1,957
Attached	264

*Positive figures result in greater capacity of dwellings relative to the required dwellings

BURRUM – FRASER

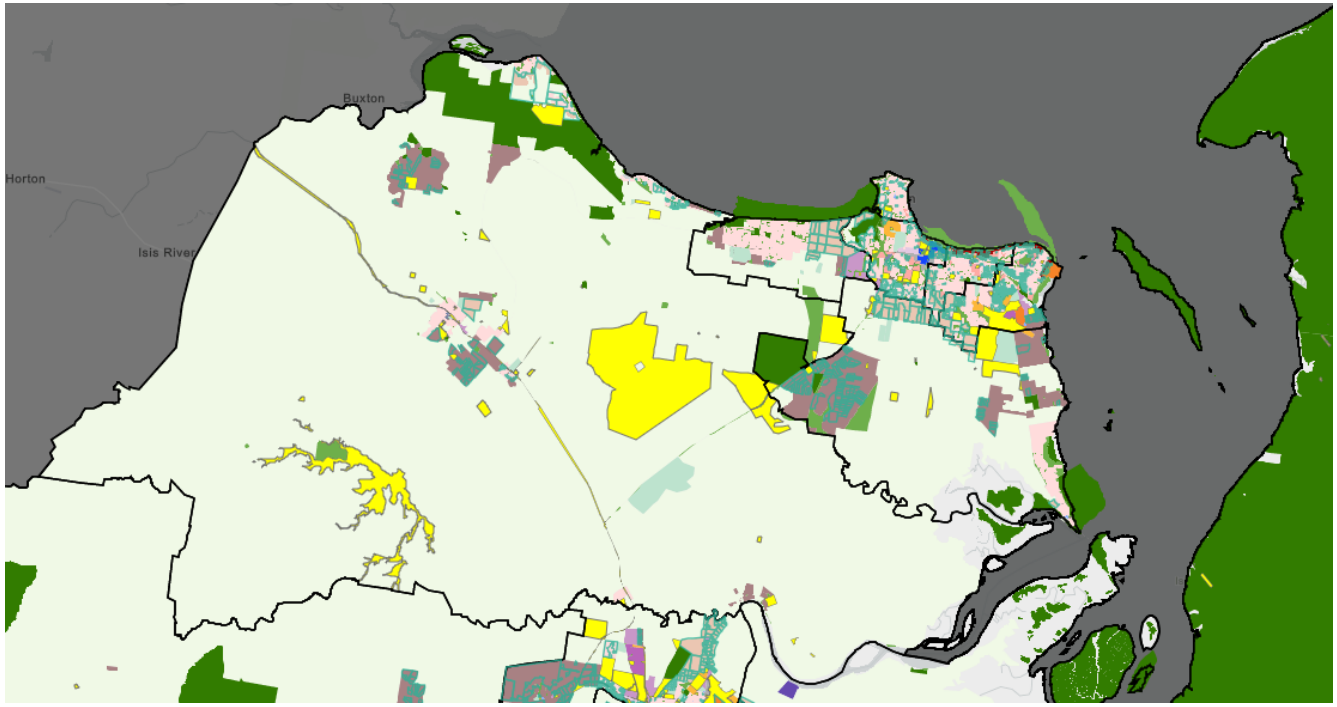
Summary

Burrum Fraser is one of the largest SA2's, which includes the lands between Hervey Bay and Maryborough, and includes K'Gari (Fraser Island).

The majority of this land is rural, with some low density and rural residential around existing residential nodes to the north-west.

K'Gari is largely environmental management zoning.

Map of Available Land



BURRUM – FRASER DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	824	3,551			148.4	102.2				1,113
LDR	698	3,551			54.1	18.7				
Detached	402	3,302	93%	8.2	20.7	2.1	100%	18.7	10.0	187
Attached	7	249	7%	37.1			0%	0.0	30.0	0
Other	289				33.3	16.7				
MDR	6				2.1	0.4				
Detached							0%	0.0	10.0	0
Attached							100%	0.4	30.0	12
Other	6				2.1	0.4				
Rural Residential	1,527	657			250.2	213.8				
Detached	1,102	652	99%	0.6	193.7	174.3	100%	213.8		0
Attached	11	5	1%	0.5			0%	0.0		0
Other	415				56.5	39.6				
Emerging Community	121				92.2	83.0				
Detached							95%	78.9	10.0	789
Attached							5%	4.2	30.0	125
Other	121				92.2	83.0				

Given the more rural nature of this SA2, there is limited capacity of just 1,113 dwellings, of which the majority are within the emerging communities zone. There is not likely to be many attached dwellings, with circa 70 expected across the whole SA2.

It is noted that the densities within this SA2 may be considered aggressive given the more rural nature, particularly for attached product.

BURRUM – FRASER DEMAND AND SUPPLY

Insights

Under the medium case population series, Burrum-Fraser may be home to more than 2,800 new residents in the next 20 years, equating to 1,445 dwellings.

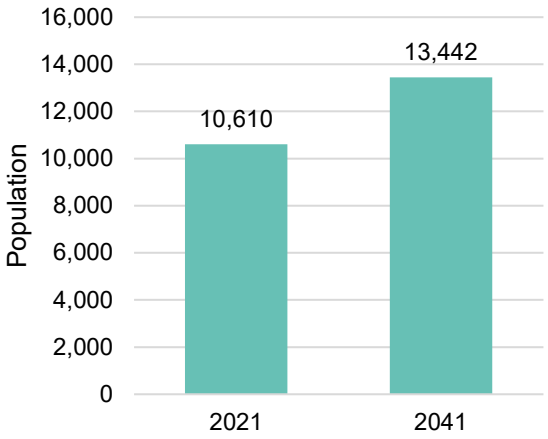
With an overall housing capacity of just 1,113, there may be a shortfall in land for detached dwellings. With higher population growth, this is only set to exuberate the issue.

It is noted that the Emerging Community zoned land at Burrum Heads provides the bulk of the capacity for this SA2. Further the majority of this area is currently covered by existing approvals. Additional capacity will be limited by coastal hazard constraining additional development.

It may be that growth in this coastal area will be curtailed over the long term and that projected growth will occur elsewhere – in planned growth areas such as Nikenbah (Booral-River Heads SA2)

The Howard and Torbanlea rural townships lack infrastructure and supporting urban services for a specific growth focus – through changing industrial development in the area may influence growth pressures.

Medium Population Growth Series 2021-2041

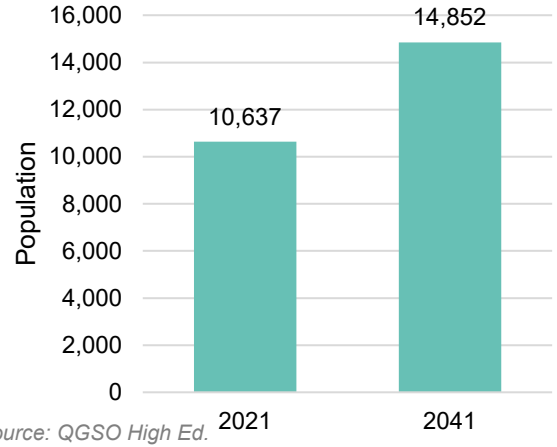


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	2,832
Dwelling Requirements	
Detached	1,321
Attached	124
Capacity Surplus*	
Detached	-345
Attached	13

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	4,215
Dwelling Requirements	
Detached	1,649
Attached	154
Capacity Surplus*	
Detached	-673
Attached	-17

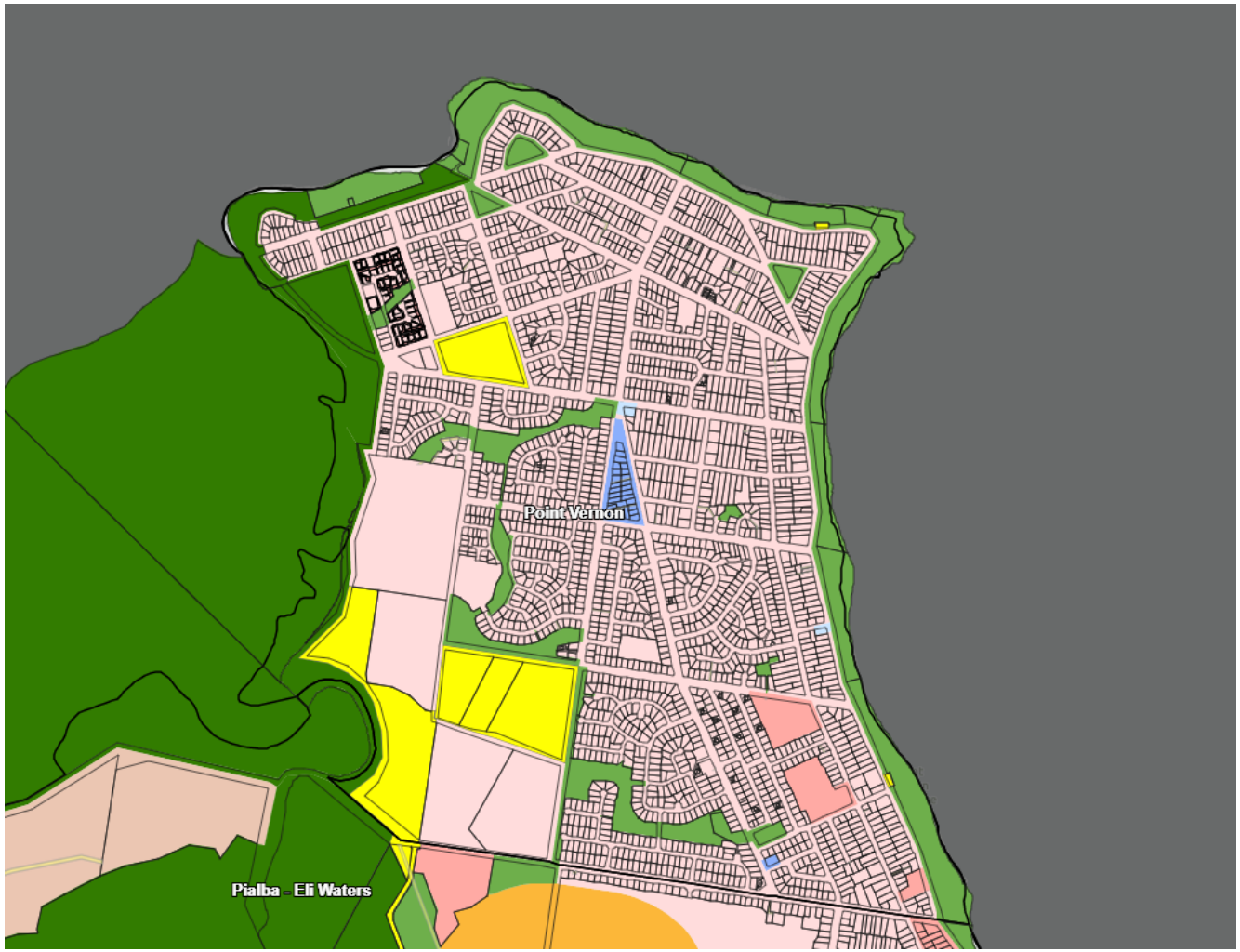
*Positive figures result in greater capacity of dwellings relative to the required dwellings

POINT VERNON

Summary

Point Vernon is one of the smaller SA2's covering just the peninsula. The area is characterised by low density detached dwellings, with a handful of medium density pockets along the southern coastline.

Map of Available Land



POINT VERNON DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	263	2,504			23.6	5.2				72
LDR	256	2,504			23.6	5.2				
Detached	199	2,389	95%	12.0	9.5	1.0	80%	4.1	10.0	41
Attached	5	115	5%	24.7			20%	1.0	30.0	31
Other	52				14.1	4.2				
MDR	6									
Detached							0%	0.0	10.0	0
Attached							100%	0.0	30.0	0
Other	6									

Given Point Vernon is well established and covers just 263ha of land, there is minimal capacity for additional development. Whilst there may be almost 24ha of available land, it is heavily fragmented across several parcels of land, with just 5ha of that being viable for development. As a result, there is capacity for a further 72 dwellings.

POINT VERNON DEMAND AND SUPPLY

Insights

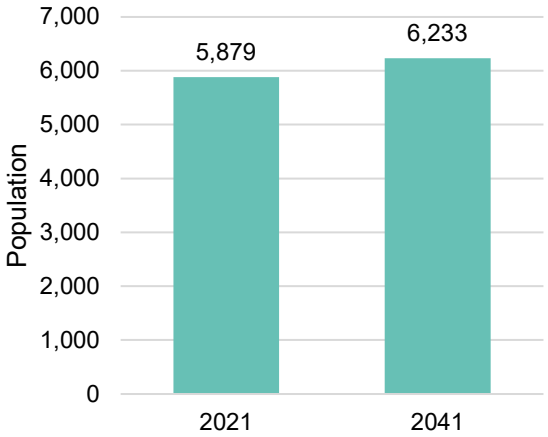
With limited opportunities for new development, Point Vernon is not expected to see any major population growth.

Under the medium case population series, there are just 350 persons expected over the 20 years. However, given the area is already well established, there may be a capacity issue to provide housing.

Under the high growth scenario, there will be a capacity issue, which may result in a need to redevelop suitable areas to cater for future growth.

Given the area is so well established and is constrained by the coastline, there are minimal areas for expansive development. Development is suggested to be focused on suitably scaled pocket infill in areas where older stock and/or large allotments currently exist and would be suitable for redevelopment.

Medium Population Growth Series 2021-2041

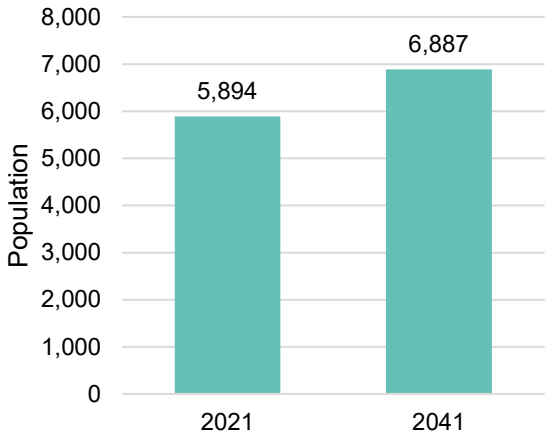


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	354
Dwelling Requirements	
Detached	138
Attached	13
Capacity Surplus*	
Detached	-97
Attached	18

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	993
Dwelling Requirements	
Detached	385
Attached	33
Capacity Surplus*	
Detached	-344
Attached	-2

*Positive figures result in greater capacity of dwellings relative to the required dwellings

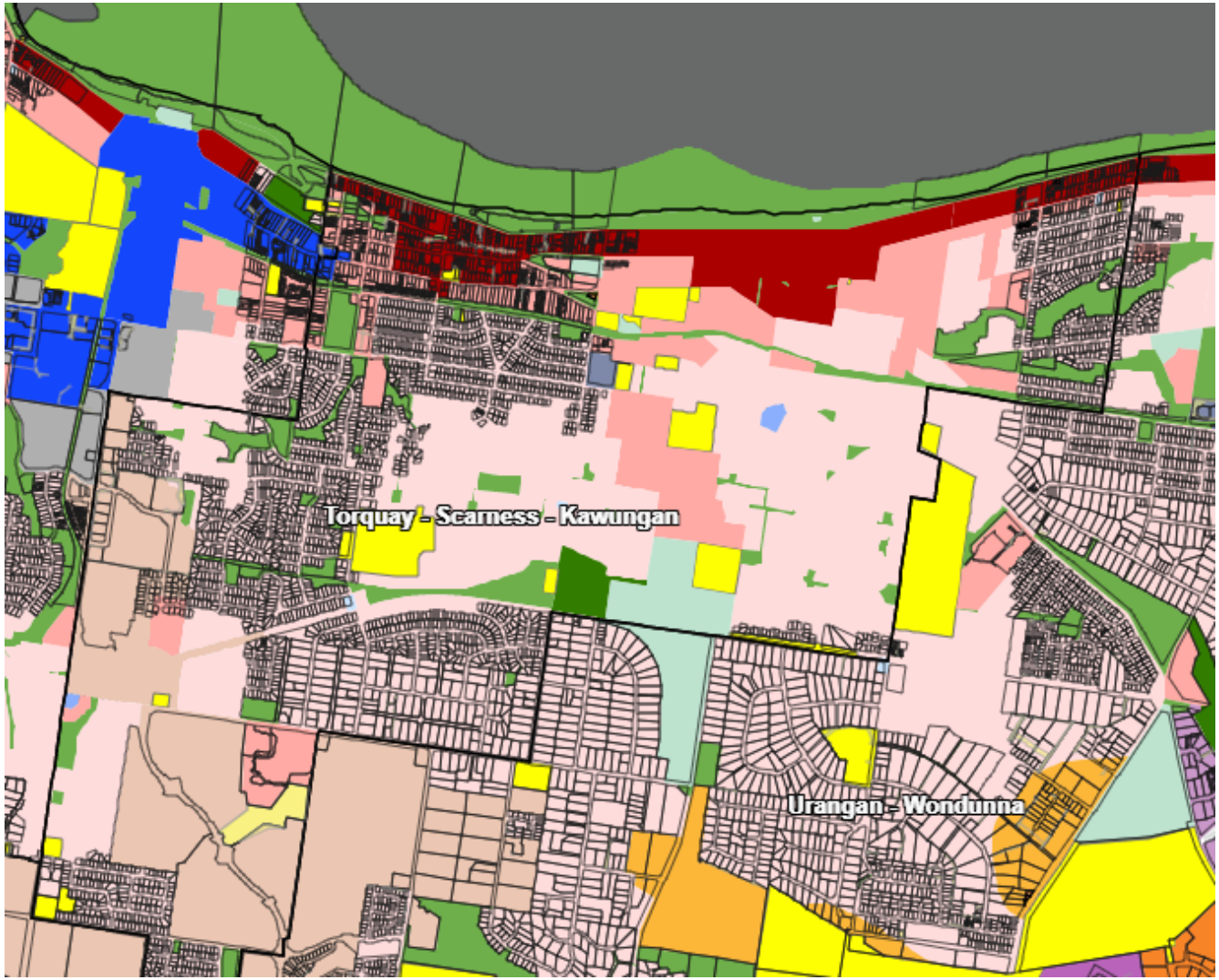
TORQUAY – SCARNESS – KAWUNGAN

Summary

Torquay – Scarness – Kawungan is located on the coastline, with the northern border facing the ocean. As a result, there are a range of zoning areas and product types. This SA2 holds the greatest supply of high density zoning which is located along the coastline. There are also a few blocks of medium density, before reverting to the more standard low density zoning.

For the most part, the SA2 is largely residential, with some areas zoned as community facilities.

Map of Available Land



TORQUAY – SCARNESS – KAWUNGAN DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	710	6,827			177.1	117.0				1,492
LDR	429	4,631			26.3	2.6				
Detached	393	4,379	95%	11.2	21.0	2.1	70%	1.8	10.0	18
Attached	13	252	5%	18.9			30%	0.8	30.0	24
Other	24				5.3	0.5				
MDR	84	1,018			22.1	4.4				
Detached	34	334	33%	10.0	16.7	3.3	0%	0.0	10.0	0
Attached	13	684	67%	52.3			100%	4.4	40.0	177
Other	37				5.4	1.1				
HD	58	1,156			8.2	1.6				
Detached	22	221	19%	10.0	4.5	0.9	0%	0.0	10.0	0
Attached	9	935	81%	107.8			100%	1.6	50.0	82
Other	27				3.8	0.8				
Emerging Community	139	22			120.5	108.3				
Detached	2	22	100%	11.5	0.3	0.1	95%	102.9	10.0	1,029
Attached							5%	5.4	30.0	162
Other	137				120.2	108.2				

As noted prior, the SA2 includes large areas of land which are zoned medium and high density – covering 142ha of land. As a result, the SA2 holds the highest number of units at just almost 1,900. Despite being so heavily built up, there are large areas of emerging community to the south which do have a higher capacity for additional dwellings. Overall, there is a capacity for 1,492 dwellings, of which 80% is located within the emerging communities zone.

TORQUAY – SCARNESS – KAWUNGAN DEMAND AND SUPPLY

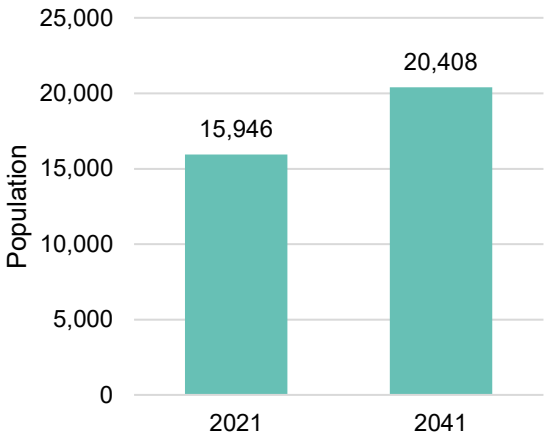
Insights

Despite being relatively established, the Torquay SA2 is still projected to hold a sizable population. Under the medium case population series, there are forecast to be an additional 4,462 persons over the 20 years. Given this strong growth and established nature, there may be a capacity issue to provide housing.

Under the high growth scenario, the capacity issue is further exacerbated, with about 1,600 dwellings not being able to be provided for.

The imperative to maximise development yield from the Emerging Community zoned land and encourage infill development in this location is evident if forecast growth is to be serviced.

Medium Population Growth Series 2021-2041

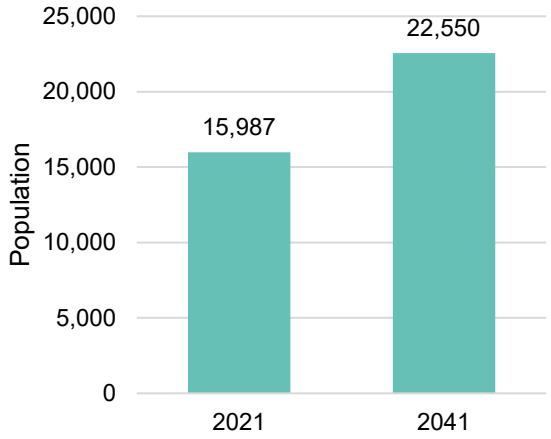


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	4,462
Dwelling Requirements	
Detached	1,283
Attached	813
Capacity Surplus*	
Detached	-236
Attached	-368

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	6,563
Dwelling Requirements	
Detached	1,887
Attached	1,196
Capacity Surplus*	
Detached	-840
Attached	-751

*Positive figures result in greater capacity of dwellings relative to the required dwellings

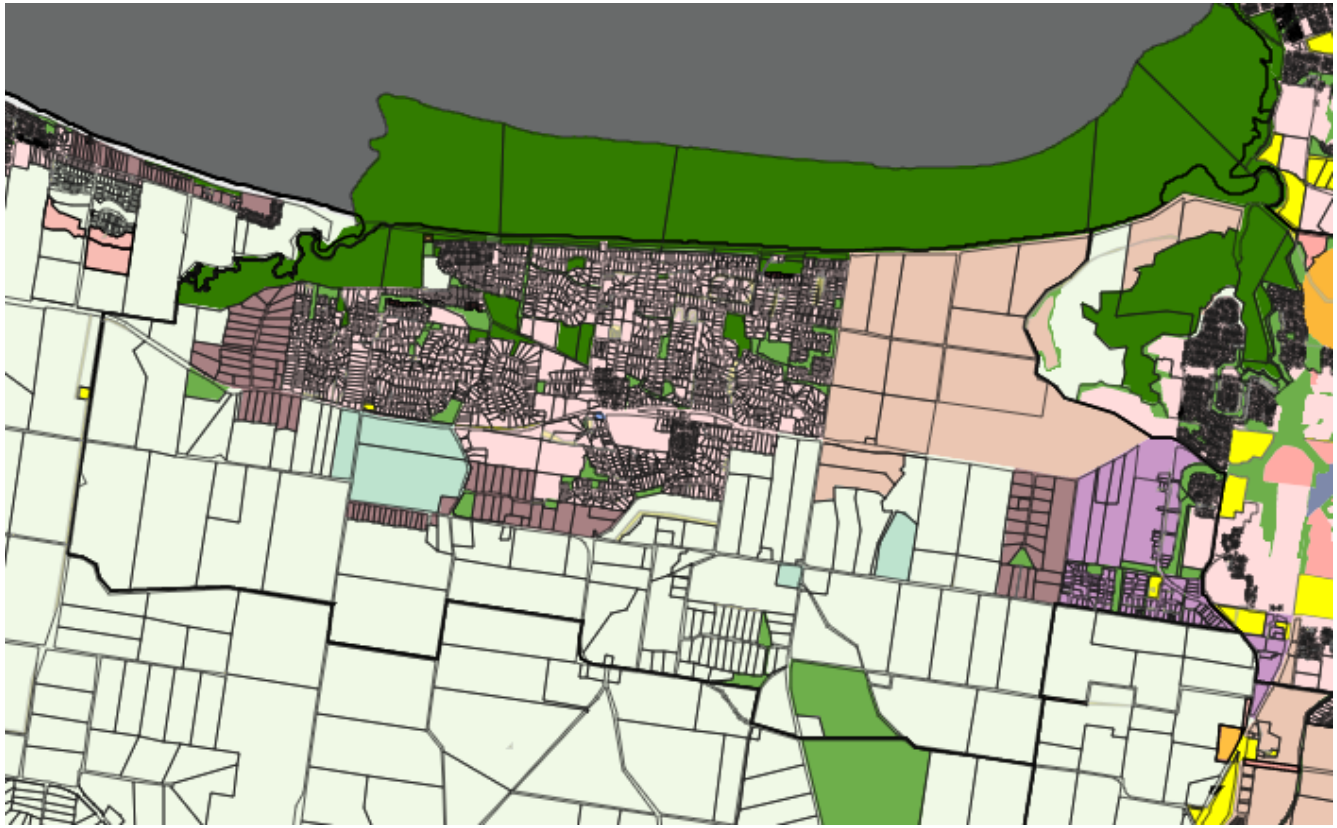
CRAIGNISH – DUNDOWRAN BEACH

Summary

The Craignish – Dundowran Beach SA2 is largely a low density area. The area has an established residential area, which is bordered to the west and south by rural residential, and large areas of emerging communities to the east.

There is an area to the east which holds medium density industrial lands.

Map of Available Land



CRAIGNISH – DUNDOWRAN BEACH DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	1,323	1,928			216.1	190.6				2,285
LDR	704	1,925			2.5	1.2				
Detached	597	1,903	99%	3.2			100%	1.2	10.0	12
Attached	3	22	1%	7.3			0%	0.0	15.0	0
Other	104				2.5	1.2				
Rural Residential	194	90			9.1	6.3				
Detached	166	82	91%	0.5			100%	9.1		0
Attached	9	8	9%	0.8			0%	0.0		0
Other	18				9.1	6.3				
Emerging Community	426	3			213.7	189.4				
Detached	16	3	100%	0.2	14.5	10.1	90%	170.5	10.0	1,705
Attached							10%	18.9	30.0	568
Other	409				199.2	179.3				

As per the map previously, the areas zoned low density are largely developed, with very few parcels remaining. Within this area, only circa 1ha remains viable for development.

However, as noted, there are large areas of emerging communities land to the east, offering circa 190ha of viable, developable land. As a result, the SA2 overall has a total dwelling capacity of 2,285, with that largely being within this zoning.

CRAIGNISH – DUNDOWRAN BEACH DEMAND AND SUPPLY

Insights

Although the area has a large amount of land available, population growth is relatively low. This is likely due to the low density attributes, which may continue into the future.

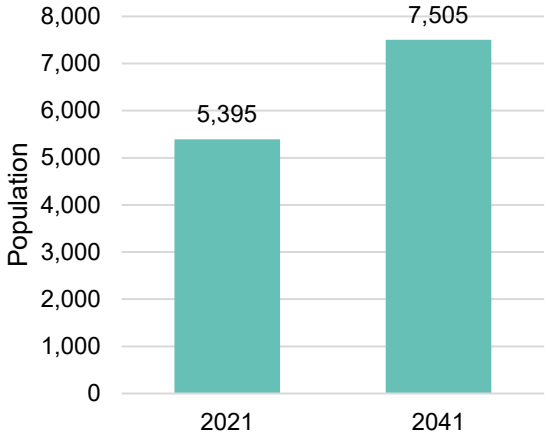
Under the medium case scenario, there will be circa 7,500 residents by 2041, with an additional 800 dwellings needed to house the incoming population.

Should the high case population be achieved, dwelling requirements will increase to 1,075.

However with the significant land available, there is adequate capacity to support growth within this area.

The majority of the forecast growth will be serviced within the coastal Emerging Community zoned land at Dundowran. Should yields be impacted by coastal hazard issues, growth may not be able to be realised resulting in growth pressures elsewhere.

Medium Population Growth Series 2021-2041

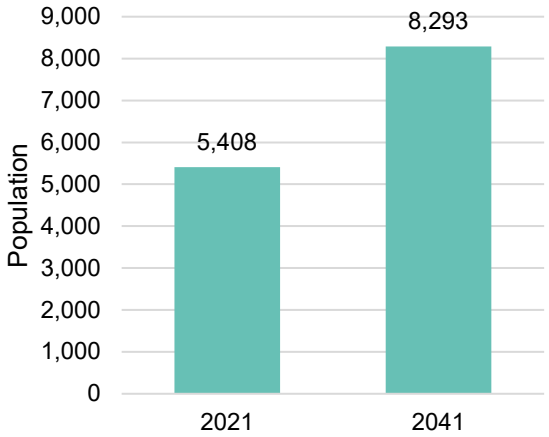


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	2,111
Dwelling Requirements	
Detached	789
Attached	8
Capacity Surplus*	
Detached	928
Attached	560

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	2,884
Dwelling Requirements	
Detached	1,065
Attached	10
Capacity Surplus*	
Detached	652
Attached	558

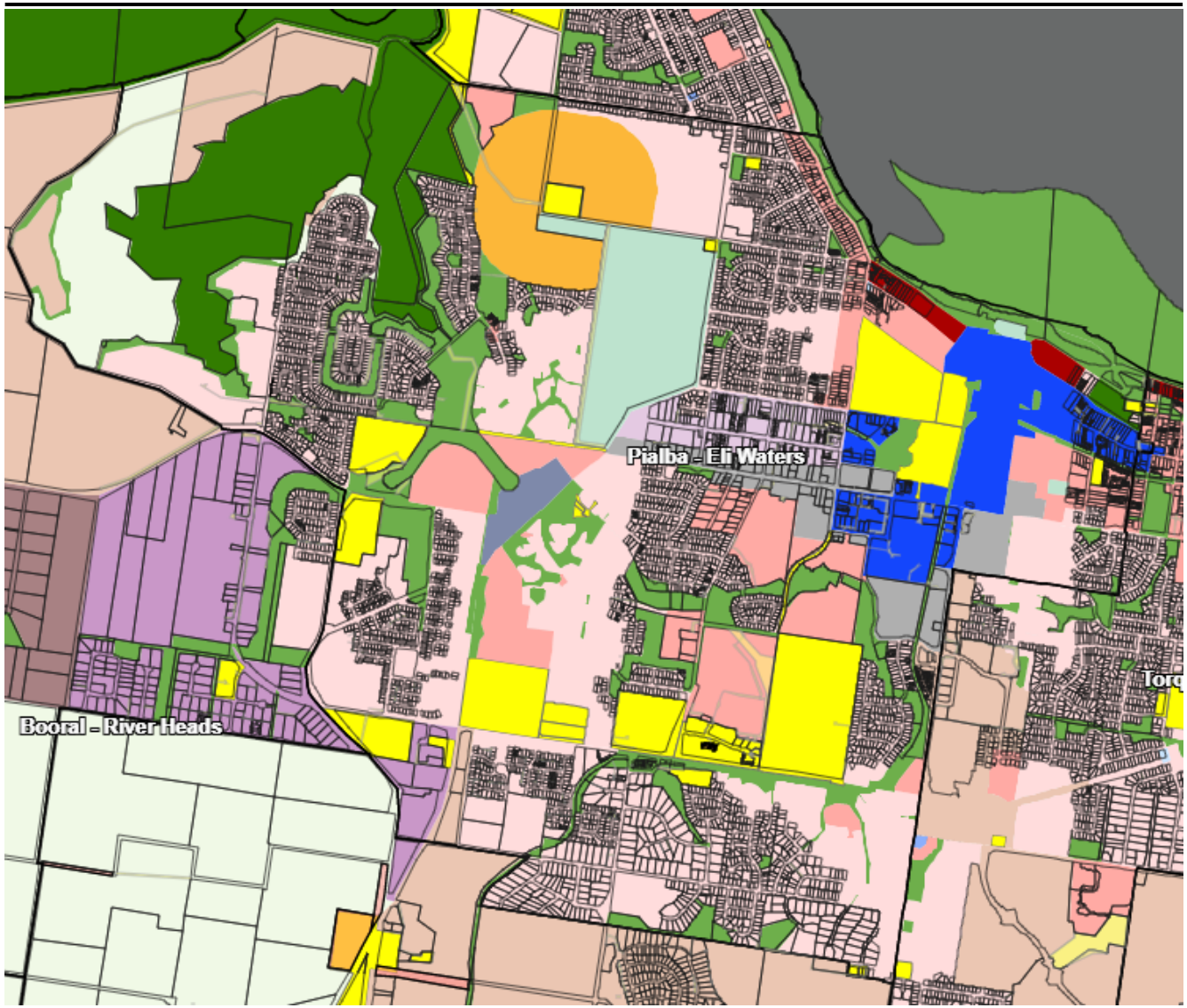
*Positive figures result in greater capacity of dwellings relative to the required dwellings

PIALBA – ELI WATERS

Summary

The Pialba – Eli Waters SA2 covers a large area within the centre of the Hervey Bay Region. As a result, the SA2 includes majority of the zonings with the principle centre located to the east, and medium and high density circling that zone. The areas to the north and east are largely low density areas.

Map of Available Land



PIALBA – ELI WATERS DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	721	5,597		7.8	187.7	84.9				1,148
LDR	544	4,772			106.4	35.0				
Detached	405	4,514	95%	11.1	45.0	4.5	80%	28.0	10.0	280
Attached	8	258	5%	32.0	0.5	0.0	20%	7.0	30.0	210
Other	131				60.9	30.5				
MD	76	732			23.5	4.7				
Detached	30	244	33%	8.2	14.1	2.8	20%	0.9	10.0	9
Attached	9	488	67%	56.3			80%	3.8	40.0	150
Other	38				9.5	1.9				
HD	7	91			1.3	0.3				
Detached	2	20	22%	9.6	0.4	0.1	0%	0.0	10.0	0
Attached	1	71	78%	128.6			100%	0.1	50.0	4
Other	4				0.9	0.2		0.0		
Emerging Community	94	2			56.5	45.0				
Detached	29	2	100%	0.1	26.9	24.2	95%	42.7	10.0	427
Attached							5%	2.2	30.0	67
Other	65				29.7	20.8				

There are 5,597 dwellings currently in the SA2, equating to a relatively high density overall. There is also a large portion of the land which is available for development, however this is highly fragmented. As a result, just 85ha of land is viable for development. There is capacity for just 1,148 additional dwellings across this space, which is spread between the low density zone, and the emerging communities zone.

PIALBA – ELI WATERS DEMAND AND SUPPLY

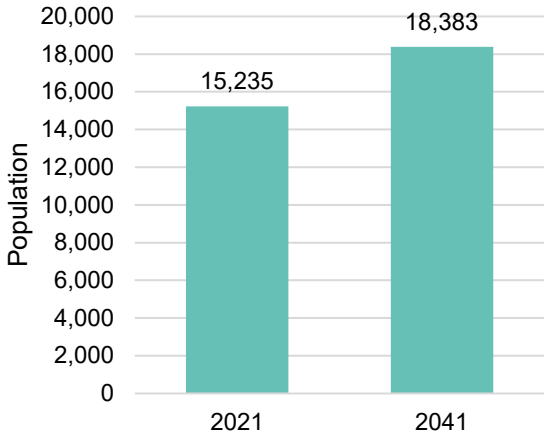
Insights

Despite being relatively established, the Pialba SA2 is still projected to hold a sizable population. Under the medium case population series, there are forecast to be an additional 3,148 persons over the 20 years. Given this strong growth and established nature, there may be a capacity issue to provide housing.

Under the high growth scenario, the capacity issue is further exacerbated, with about 1,050 dwellings not being able to be provided for.

The imperative to maximise development yield from existing developed land through infill development in this location is evident if forecast growth is to be serviced. The new Pialba CBD masterplan should be leveraged for additional infill development as a priority.

Medium Population Growth Series 2021-2041

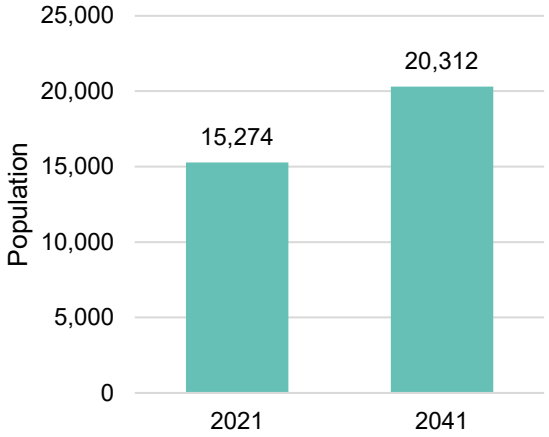


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	3,148
Dwelling Requirements	
Detached	1,361
Attached	317
Capacity Surplus*	
Detached	-645
Attached	111

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	5,038
Dwelling Requirements	
Detached	1,766
Attached	410
Capacity Surplus*	
Detached	-1,050
Attached	22

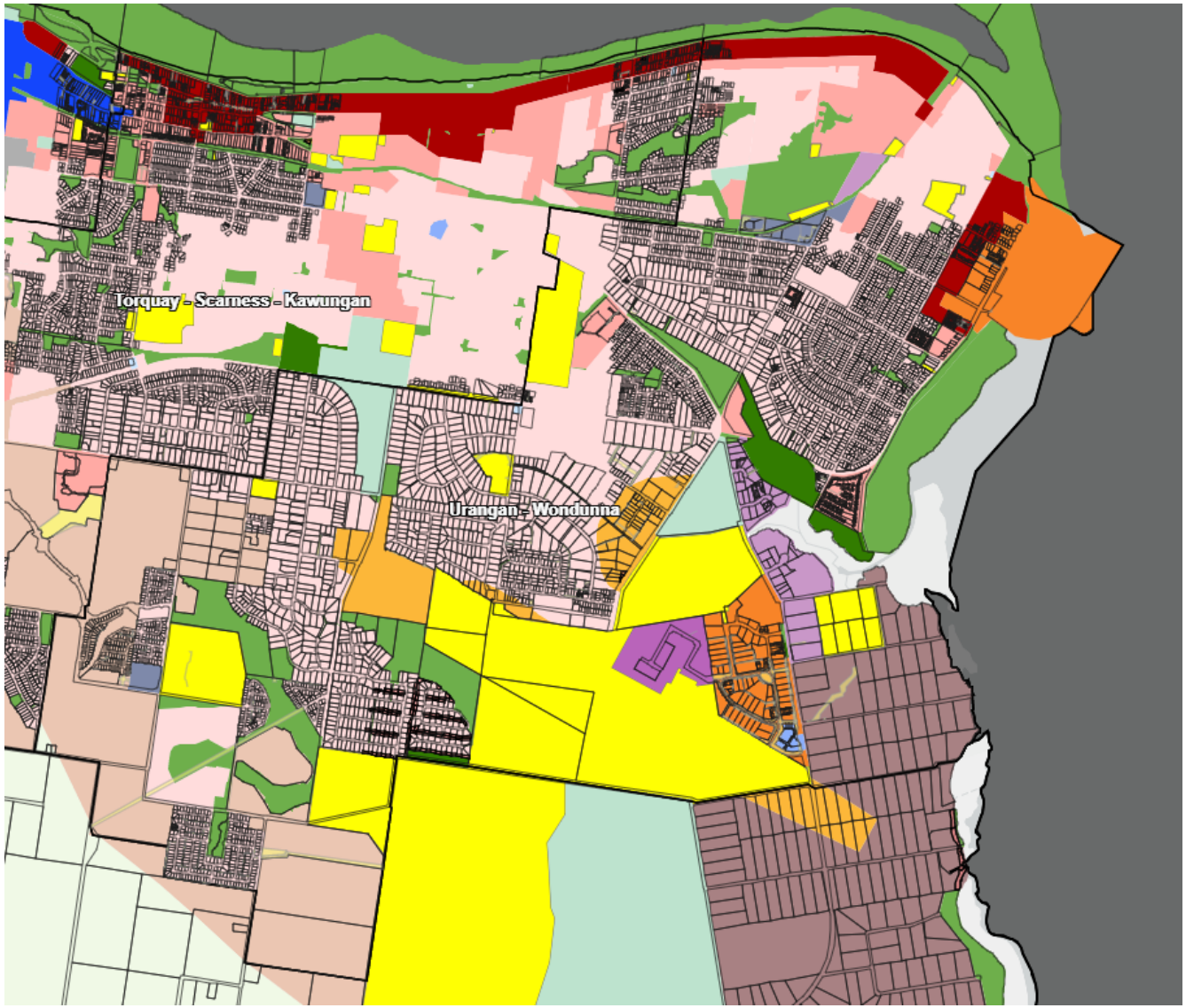
*Positive figures result in greater capacity of dwellings relative to the required dwellings

URANGAN – WONDUNNA

Summary

Urangan – Wondunna is located in the far north-east corner, bordered by the ocean on both sides. Again, the area is largely low density residential, with some mixed use zoning along the eastern coastline. There is also a small area of rural residential land, which adjoins the River Heads area to the south. High density is located to the north, rounding out the two coastline blocks, similar to the adjacent Torquay SA2.

Map of Available Land



URANGAN – WONDUNNA DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	1,206	6,006		5.0	417.9	250.3				2,997
LDR	714	4,521			140.5	31.4				
Detached	608	4,302	95%	7.1	97.0	9.7	80%	25.2	10.0	252
Attached	15	219	5%	14.9			20%	6.3	30.0	189
Other	91				43.5	21.7				
MD	61	720			14.2	2.8				
Detached	17	145	20%	8.5	8.3	1.7	0%	0.0	10.0	0
Attached	8	575	80%	69.6	0.1	0.0	100%	2.8	40.0	113
Other	35				5.8	1.2				
HD	39	743			8.7	1.7				
Detached	16	180	24%	10.9	3.8	0.8	0%	0.0	10.0	0
Attached	5	563	76%	105.5			100%	1.7	50.0	87
Other	17				4.9	1.0				
Rural Res	88	29			34.4	17.2				
Detached	55	27	93%	0.5	18.0	9.0	100%	17.2		0
Attached	2	2	7%	1.0			0%	0.0		0
Other	30				16.4	8.2				
Emerging Community	305	22			254.5	214.2				
Detached	42	19	86%	0.5	37.1	18.6	95%	203.5	10.0	2,035
Attached	4	3					5%	10.7	30.0	321
Other	259				217.4	195.7				

Despite being well established, there are large areas of this SA2 which remain both available, and viable. In total, there is 250ha which is viable for additional development, of which 214ha is located in the emerging communities zone to the south-west.

Overall, there is capacity for an additional 2,997 dwellings. However as noted, these are generally located within the south-west corner, with limited capacity for infill development closer to the coastline.

URANGAN – WONDUNNA DEMAND AND SUPPLY

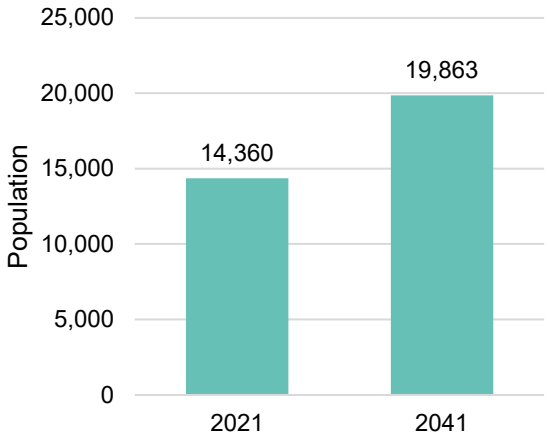
Insights

Despite being relatively established, the Urangan SA2 is still projected to hold a sizable population. Under the medium case population series, there are forecast to be an additional 5,503 persons over the 20 years. With such strong growth, and limited capacity within the medium and high density zones, there may be land supply issues for attached product.

Under the high growth scenario, the capacity issue is further exacerbated, with potential land supply issues for attached housing.

The imperative to maximise development yield from existing developed land through infill development in this location is evident if forecast growth is to be serviced. More intensive development in the vicinity of highly desirable coastal precincts (including Urangan Harbour precinct) should be prioritised.

Medium Population Growth Series 2021-2041

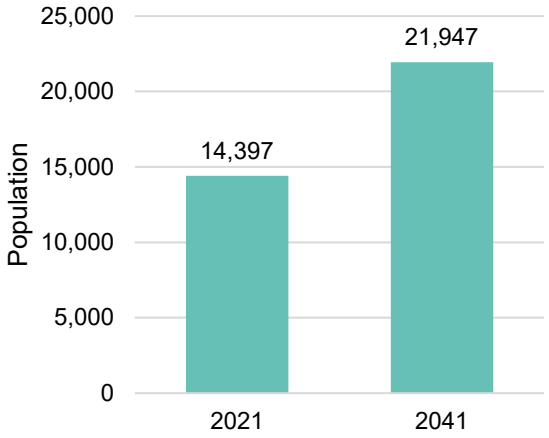


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	5,503
Dwelling Requirements	
Detached	1,683
Attached	689
Capacity Surplus*	
Detached	604
Attached	21

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	7,550
Dwelling Requirements	
Detached	2,285
Attached	936
Capacity Surplus*	
Detached	2
Attached	-226

*Positive figures result in greater capacity of dwellings relative to the required dwellings

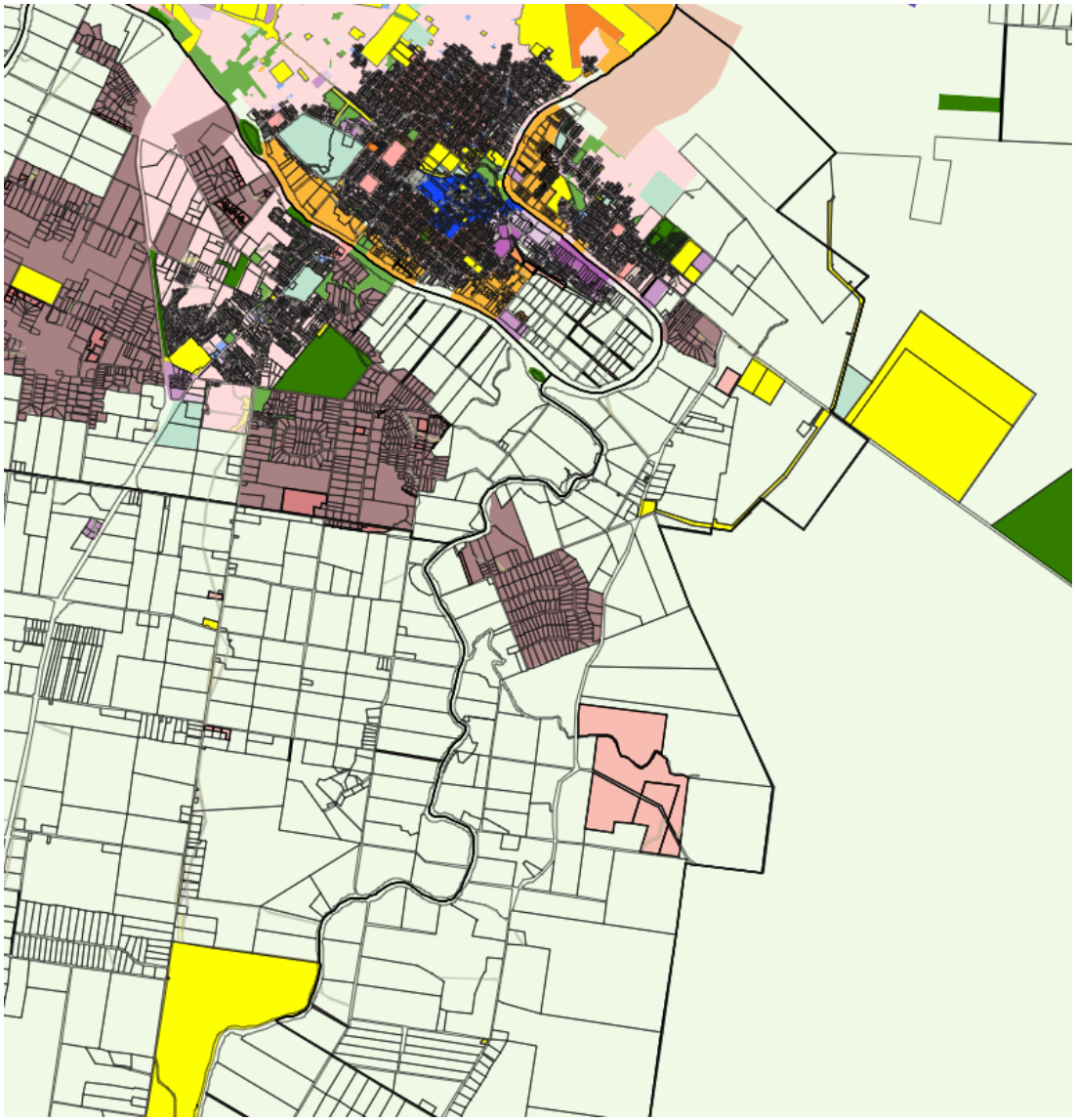
GRANVILLE

Summary

Granville is an SA2 located to the east of Maryborough, stretching from the north of Maryborugh about 14km south. Generally all of the zoned residential land is adjacent to the township, offering mostly low density land, as well as some parcels of medium density land.

There are also some pockets of rural residential and low density residential to the south which is expected to see ongoing development.

Map of Available Land



GRANVILLE DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	515	1,032		2.0	115.2	68.8				71
LDR	148	1,024			46.1	6.7				
Detached	122	931	91%	7.6	35.8	3.6	90%	6.0	10.0	60
Attached	2	93	9%	37.6			10%	0.7	15.0	10
Other	23				10.4	3.1				
MD	6	8			0.1	0.0				
Detached							0%	0.0	10.0	0
Attached	0	8	100%	74.8			100%	0.0	30.0	1
Other	6				0.1	0.0				
Rural Res	220	155			45.7	31.0				
Detached	172	155	100%	0.9	25.4	12.7	100%	31.0		0
Attached							0%	0.0		0
Other	47				20.3	18.3				
Emerging Community	141				69.0	62.1				
Detached							95%	59.0	10.0	0
Attached							5%	3.1	30.0	0
Other	141				69.0	62.1				

It is noted that the client has requested to remove the capacity figures for land zoned emerging community within Granville. It is understood this was zoned as such for a single development and is no longer valid for emerging communities.

Therefore, by discounting this land, there is very little capacity to accommodate any future development. Given all new housing is to be within infill locations, just 71 dwellings are expected to be supportable within the existing zones.

GRANVILLE DEMAND AND SUPPLY

Insights

Despite having low population growth, Granville is still expected to have land supply issues.

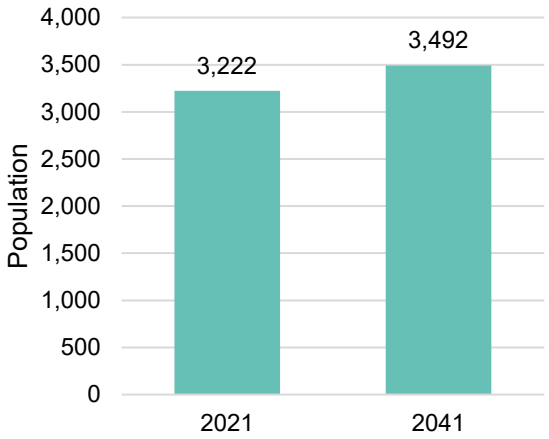
Under the medium case population growth, there is 124 dwellings required to house the 269 residents. Under the high case, this increases to 263 dwellings. With a total capacity of just 71 dwellings, there is a land supply shortfall of at least 43 dwellings over the next 20 years.

Based on client feedback, it is recognised that the existing Emerging Community zoned land is no longer valid for emerging communities. It has therefore been removed from capacity calculations – leading to a shortfall.

Given the large area of Emerging Community zoned land at St. Helens – we do not envisaged any overall constraint of supply in Maryborough.

Attached product within infill development remains something to be encouraged.

Medium Population Growth Series 2021-2041

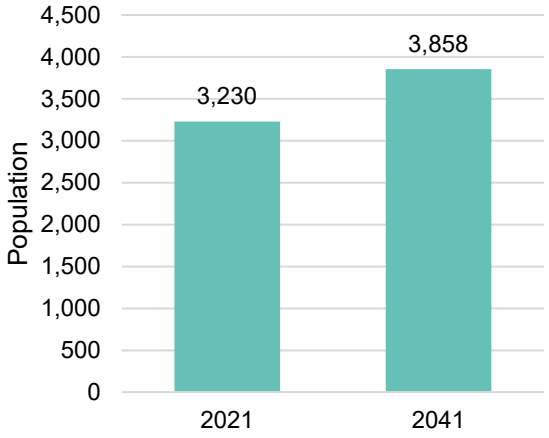


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	269
Dwelling Requirements	
Detached	97
Attached	17
Capacity Surplus*	
Detached	-37
Attached	-6

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	628
Dwelling Requirements	
Detached	225
Attached	38
Capacity Surplus*	
Detached	-165
Attached	-27

*Positive figures result in greater capacity of dwellings relative to the required dwellings

TINANA

Summary

The Tinana SA2 is located to south of Maryborough. The area is characterised by largely rural residential lands, with some low density development within the central area of the SA2.

Map of Available Land

TINANA DWELLING CAPACITY

Dwelling Capacity

Zone/Housing Type	Existing Variables						Projected Housing Capacity			
	Total Area	Total Dwellings	Dwelling Split	Existing Density	Realistically Available Land	Realistically Viable Land	Adjusted Split	Adjusted Available Land	Increased Density	Total Dwelling Capacity
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	1,655	1,207		0.7	198.9	60.9				642
LDR	441	1,207			198.3	60.7				
Detached	238	1,170	97%	4.9	96.0	9.6	90%	54.7	10.0	547
Attached	7	37	3%	5.1			10%	6.1	15.0	91
Other	195				102.3	51.2				
MD	3				0.6	0.1				
Detached							0%	0.0	10.0	0
Attached							100%	0.1	30.0	4
Other	3				0.6	0.1				
Rural Res	1,212	759			540.3	419.0				
Detached	909	758	100%	0.8	336.8	235.7	100%	419.0		0
Attached	1	1	0%	0.8			0%	0.0		0
Other	301				203.6	183.2				

Whilst Tinana has a relatively large area available for development, this is heavily fragmented. As a result, there is just 61ha of land which is viable. Given there is no emerging communities land within Tinana, this land is located within the low density zone. In total, there is capacity for an additional 642 dwellings, of which essentially all will be within the existing low density areas.

TINANA DEMAND AND SUPPLY

Insights

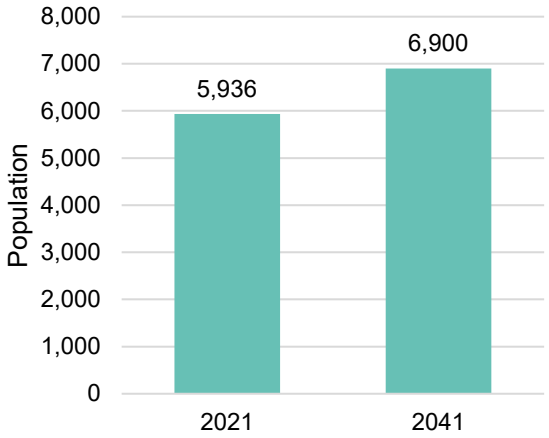
Tinana is not expected to see very strong growth over the 20 years. Under the medium case scenario, there are just under 1,000 new residents. This increases to 1,670 under the high case scenario to reach a population above 7,600.

Under the medium case, with a dwelling requirement of 377, there is enough capacity to provide these dwellings, with a relatively low surplus.

Under the high case however, there is constrained capacity within the zoned land to provide the full amount of the projected 600 detached dwellings.

Efficient use of the existing Low Density Residential zoned land for infill development will be important to service growth.

Medium Population Growth Series 2021-2041

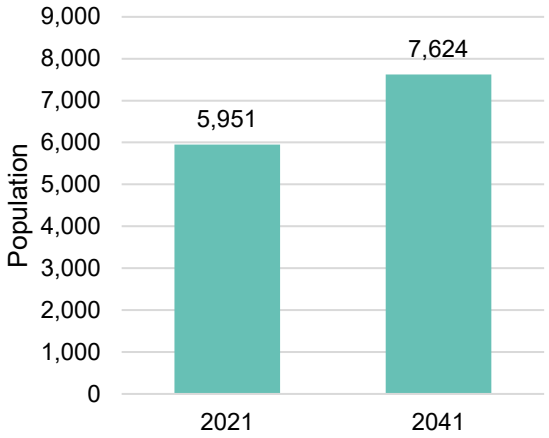


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	964
Dwelling Requirements	
Detached	201
Attached	64
Capacity Surplus*	
Detached	91
Attached	63

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	1,673
Dwelling Requirements	
Detached	600
Attached	54
Capacity Surplus*	
Detached	-53
Attached	41

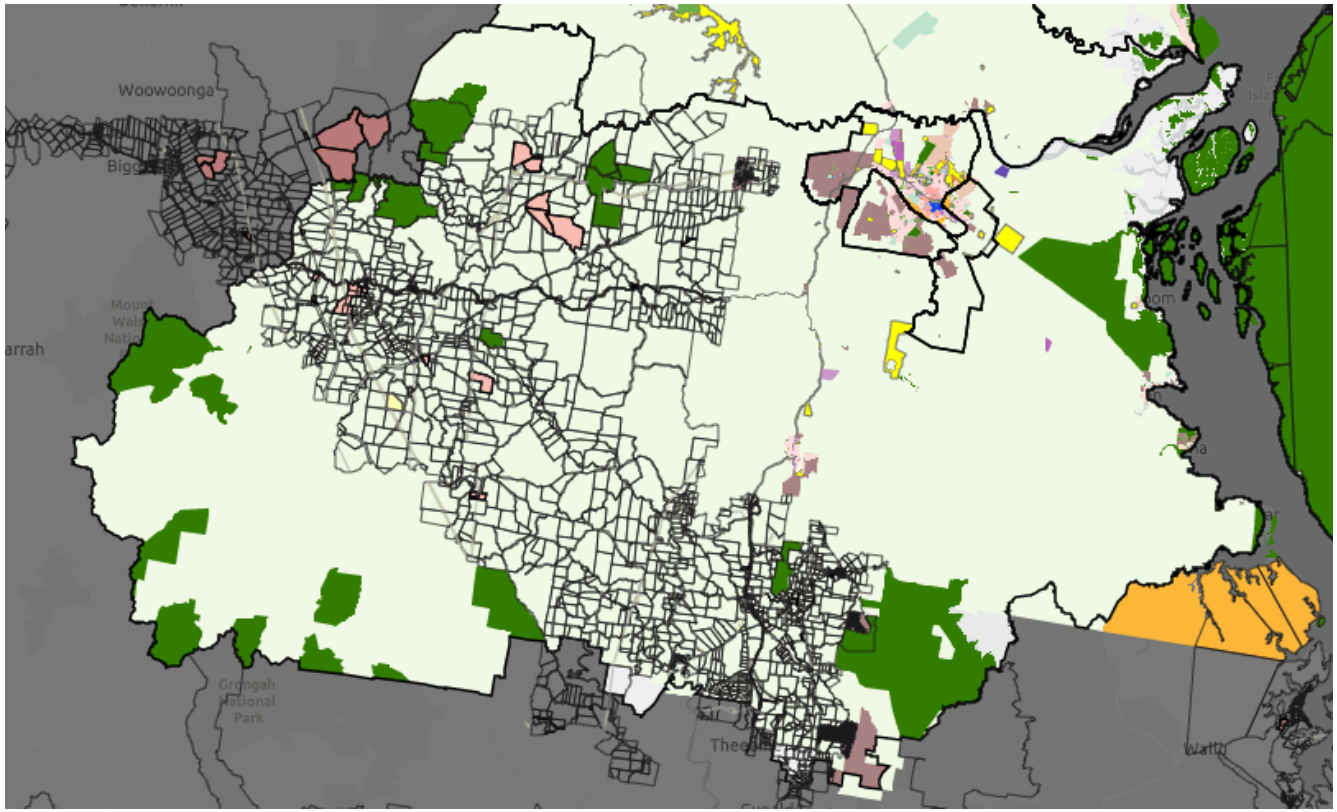
*Positive figures result in greater capacity of dwellings relative to the required dwellings

MARYBOROUGH REGION – SOUTH

Summary

Maryborough Region South is a very large area, which is largely rural zoned land. There is some residential zoned land in small townships such as Tiaro and Bauple with further areas contained in the Great Sandy Strait townships. The southern rural residential area of Glenwood is contained in this SA2.

Map of Available Land



MARYBOROUGH REGION – SOUTH DWELLING CAPACITY

Dwelling Capacity

	Existing Variables						Projected Housing Capacity			
Zone/Housing Type	**Total Area**	**Total Dwellings**	**Dwelling Split**	**Existing Density**	**Realistically Available Land**	**Realistically Viable Land**	**Adjusted Split**	**Adjusted Available Land**	**Increased Density**	**Total Dwelling Capacity**
	Ha	No.	%	dw/Ha	Ha	Ha	%	Ha	dw/Ha	No.
Total	3,961	1,137		0.3	29.4	26.5				291
LDR	411	1,137								
Detached	217	1,124	99%	5.2			90%	0.0	10.0	0
Attached	7	13	1%	1.8			10%	0.0	15.0	0
Other	187									
MD	7									
Detached							30%	0.0	10.0	0
Attached							70%	0.0	30.0	0
Other	7									
Rural Res	3,505	1,419			1,346.7	1,212.0				
Detached	1,684	1,417	100%	0.8	508.2	457.3	100%	1212.0		0
Attached	0	2	0%	23.4			0%	0.0		0
Other	1,821				838.5	754.7				
Emerging Community	39				29.4	26.5				
Detached							95%	25.1	10.0	251
Attached							5%	1.3	30.0	40
Other	39				29.4	26.5				

Given the limited residential zoned land, there is subsequently limited land available for development. Across the whole SA2, just 26.5ha of land remains viable for further development. At a relatively high density for the SA2, this equates to a total of 291 dwellings, which is located in the emerging communities zone.

MARYBOROUGH REGION – SOUTH DEMAND AND SUPPLY

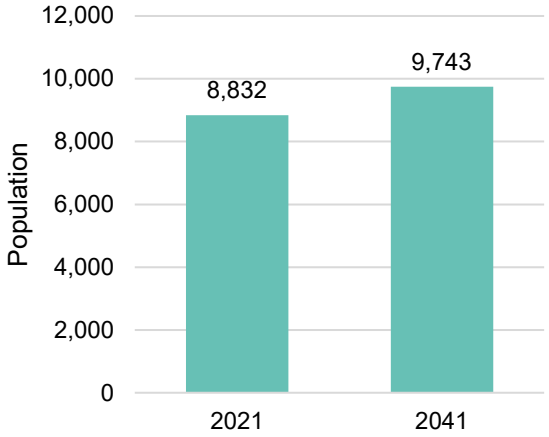
Insights

The Maryborough Region South is not expected to see strong population growth. While as a whole, utilising the high growth scenarios to cover recent “sea-change” and regional town growth pressures, high growth pressures are not envisaged for these more rural locations not tied to demonstrated growth areas. Accordingly, the medium growth scenario would appear more reasonable over the long term.

As such, the region is only set to see a population growth of 910 persons. At this rate, there is not expected to be enough zoned land to provide the required dwellings. A minor dwelling deficit is forecast which would either require growth to be directed to available precincts in Maryborough or considered as part of minor expansion areas around the rural townships.

Coastal township expansion is not a consideration given vulnerability to coastal hazard.

Medium Population Growth Series 2021-2041

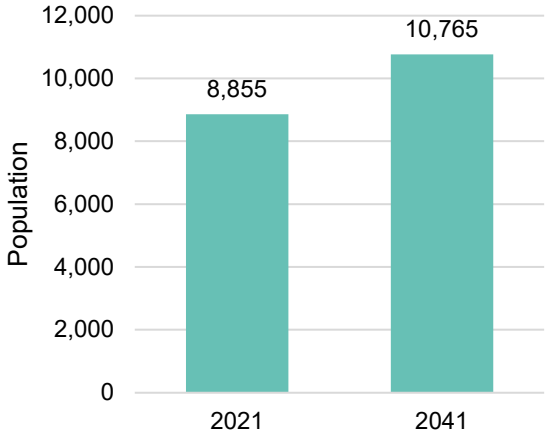


Source: QGSO Med Ed.

	Projected Dwelling Surplus
Total Population Growth	910
Dwelling Requirements	
Detached	447
Attached	13
Capacity Surplus*	
Detached	-246
Attached	7

*Positive figures result in greater capacity of dwellings relative to the required dwellings

High Population Growth Series 2021-2041



Source: QGSO High Ed.

	Projected Dwelling Surplus
Total Population Growth	1,910
Dwelling Requirements	
Detached	832
Attached	23
Capacity Surplus*	
Detached	-631
Attached	-3

*Positive figures result in greater capacity of dwellings relative to the required dwellings

APPENDIX A: DETAILED METHODOLOGY

1. EXISTING DWELLING BENCHMARK

1.1. The categories of dwellings included the following:

- Detached Houses
- Townhouses and Apartments (identified throughout the process as Attached)
- Retirement and Manufactured Home Parks
- Not A Dwelling

1.2. Rates information (provided by Fraser Coast Council) provided the initial category allocations. The following categories were used for each housing type:

- Detached:
  - Cat 1a, 1b: Res owner occupier
  - Cat 2a, 2b: Res non-owner occupier
- Attached:
  - Cat 8a – 8s: Multi-residential – flats, residential resorts, other.
- Retirement/MHP:
  - Cat 9a – 9s: Multi-residential – retirement villages, residential parks, residential services.

1.3. Bin information was then used to determine the number of dwellings within the Attached category.

1.4. Information registered under the Retirement Villages Act and the Residential Parks Act was used to determine the number of dwellings under the Retirement/MHP category.

1.5. If the cadastre did not register a dwelling, it has been listed as “Not a Dwelling”. To further analyse these with respect to the available land, the following land uses (as provided by Fraser Coast Council) have been included for analysis. All other cadastres without a dwelling and outside the below uses have been excluded.

- Farming
- Vacant Land
- Residence
- Farming with Structure
- Garage / Shed
- Motel
- Balance Area of Staged Subdivision
- Backpacker Hostel
- Public Car Park

1.6. The output of this step is to provide a count if dwellings within each category listed in 1. which can be analysed by each SA2.

2. RESIDENTIAL ZONED LAND

2.1. Each cadastre has been assigned their relevant town planning zone. The following zones have been included within the analysis:

- Low Density Residential (LDR)
- Medium Density Residential (MDR)
- High Density Residential (MDR)
- Emerging Communities (EC)
- Rural Residential (RR)

2.2. The total area of the cadastre has been calculated to get an overall area within each zone.

2.3. The output of this step is to allow for the analysis to be conducted at a zoning level.

Notes: Whilst Rural Residential zoned land has been included, it has so only for reference purposes. The overall potential capacity of this land has not been calculated or included in any of the total analysis.

3. REALISTICALLY AVAILABLE LAND

3.1. Each cadastre has been assessed based on the below overlays. Theoretical land has been 'removed' from each cadastre relative to the overlay and assumptions.

Hard Constraints – 100% Unavailable Land:

MSES

-MSES declared fish habitat area [A and B areas]
-MSES Wildlife habitat - threatened and special least concern animal
-MSES declared high ecological value waters [wetland]
-MSES high ecological significance wetlands
-MSES legally secured offset area [offset register]
-MSES legally secured offset area [vegetation offsets]
-MSES marine park [highly protected]
-MSES protected area [estates]
-MSES protected area [nature refuges]
-MSES protected area [special wildlife reserves]
-RVM category A - vegetation offsets; compliance notices; VDecs
-MSES regulated vegetation [category B - endangered or of concern]
-MSES regulated vegetation [category C- endangered or of concern]
-FCPSLocalWetlandsV11CC 2021-12-16 152317
-Contours 5m 25% + Percent Rise Slope

OM-010 Infrastructure

-SPSStockrouteNetworkV11 2021-12-16 152317
-FCWasteManagementFacilityV11 2021-12-16 152317
-FCSewerTPBuffersV11 2021-12-16 152317
-FCDefenceLandV11 2021-12-16 152317
-FCDefenceLandBufferV11 2021-12-16 152317

OM-007 Extractive Resources

-SPSKRSepAreaV11CC 2021-12-16 152317
-SPSKRSepAreaV10CC 2021-12-16 152317
-SPSKRResProcAreaV11CC 2021-12-16 152317
-SPSKRResProcAreaV11CC 2021-12-16 152317
-MiningLeaseCurrent 2021-12-16 152317
-FCPSMinedPropertiesV11CC 2021-12-16 152317

OM-009 Heritage

-FCPSHeritageRegisterV11 2021-12-16 152317

Flood

-EPA_2100_Extent_191105 2021-12-16 090949

Soft Constraints - 50% Unavailable Land:

MSES

-MSES regulated vegetation [100m from wetland]
-MSES regulated vegetation [category R- GBR riverine]
-MSES regulated vegetation [essential habitat]
-MSES strategic environmental area [designated precinct]
-MSES wildlife habitat [SEQ koala habitat - core]
-MSES wildlife habitat [SEQ koala habitat - locally refined]
-MSES wildlife habitat [special least concern animal]

OM-008 Flood Hazard

-FCPSFloodHazardAreaV11CC 2021-12-16 152317

OM-004 Biodiversity Waterways Wetlands W

-FCPSLocalWetlandsBufferV11CC 2021-12-16 152317

Soft Constraints - 25% Unavailable Land:

-Contours 5m 15-25% Percent Rise Slope

3. REALISTICALLY AVAILABLE LAND

3.2. Committed land (with existing development) has been removed from the potential development areas (see 1.5) unless it is deemed to be sufficiently large to offer infill development potential. The following lots are excluded on this basis:

-Land outside of the planned sewer service area;

-Low Density Residential – less than 2000m2 lot area

-Medium Density Residential: 75th percentile – less than 1012.5m2 lot area

-High Density Residential: 75th percentile – less than 1094.5m2 lot area

Rural Res:

-Precinct RR1 – less than 8000m2 lot area

-Precinct RR2 – less than 2 ha lot area

-Precinct Other – then than 4 ha lot area

4. REALISTICALLY VIABLE LAND

4.1. The above steps provide for a ‘realistically’ available land which is zoned residential, and has no constraints. However consideration must be given to the level of fragmentation, and the area remaining within each lot that is actually developable. E.g. IF a lot is 2,000sqm and 1,600sqm is constrained, whilst there is 400sqm of realistically available land, it is not viable for major development due to the size. Therefore, we have applied a Fragmentation Factor.

- Fragmentation Factor is the total area of Unconstrained Land by the number of lots it comprises. If the factor is large, the land is not as fragmented and more viable for development.
- Based on the fragmentation factor, we have applied assumptions around the portion of land that may be viable for development. These are different for the zones.
  - Within Low Density if the factor is:
    - <1 = 10% of land is viable (available lots have less than 1 hectare of land each)
    - >1 & <2 = 30% of land is viable(available lots have 1-2 hectares of land each)
    - >2 & <5 = 50% of land is viable(available lots have 2-5 hectares of land each)
    - >5 & <10 = 90% of land is viable(available lots have 5-10 hectares of land each)
    - >10 = 90% of land is viable(available lots have more than 10 hectares of land each)
  - Within Emerging Communities and Rural Residential if the factor is:
    - <1 = 30% of land is viable(available lots have less than 1 hectare of land each)
    - >1 & <2 = 50% of land is viable(available lots have 1-2 hectares of land each)
    - >2 & <5 = 70% of land is viable(available lots have 2-5 hectares of land each)
    - >5 & <10 = 90% of land is viable(available lots have 5-10 hectares of land each)
    - >10 = 90% of land is viable(available lots have more than 10 hectares of land each)
  - Within Medium and High Density if the factor is:
    - <1 = 20% of land is viable(available lots have less than 1 hectare of land each)
    - >1 & <2 = 30% of land is viable(available lots have 1-2 hectares of land each)
    - >2 & <5 = 40% of land is viable(available lots have 2-5 hectares of land each)
    - >5 & <10 = 70% of land is viable(available lots have 1-2 hectares of land each)
    - >10 = 90% of land is viable(available lots have more than 10 hectares of land each)

4.2. The end of this step provided the Realistically Viable Land, which can be analysed by SA2, zoning, and dwelling type.

5. SCENARIO TESTING ASSUMPTIONS

5.1. A scenario testing calculation was provided in order to determine the overall housing capacity of the land, if various assumptions were made. These assumptions revolved around the adjusted split between detached and attached, and the density of the viable land.

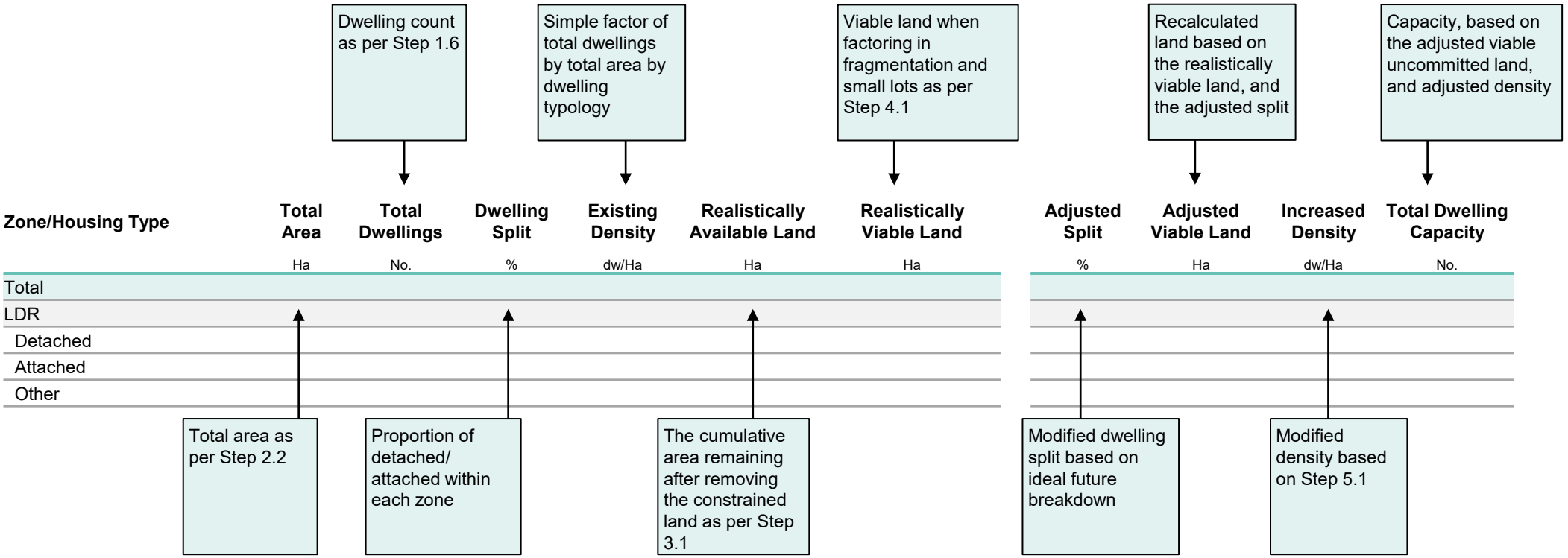
The assumptions for the split between detached/attached is reflective of each SA2. Refer to pages above for a detailed review of each SA2 to view the projected split.

The density assumptions for each zoning were as followed:

- LDR
  - Detached: 10 dw/ha
  - Attached: 15-30 dw/ha
- MDR
  - Detached: 10 dw/ha
  - Attached: 30 dw/ha
- HDR
  - Detached: 10 dw/ha
  - Attached: 50 dw/ha
- EC
  - Detached: 10 dw/ha
  - Attached: 30 dw/ha

6. DWELLING CAPACITY

7.1. With each cadastre now having a dwelling count, typology, zoning, total area, unconstrained area, viable area and committed area, the dwelling capacity can be calculated. The following table has been prepared for each SA2, with aggregate areas for Fraser Coast as well as Hervey Bay and Maryborough Regions.



COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, has and continues to cause considerable business uncertainty which in turn materially impacts market conditions and the Australian and world economies more broadly.

The uncertainty has and is continuing to impact the Australian real estate market and business operations. The full extent of the impact on the real estate market and more broadly on the Australian economy and how long that impact will last is not known and it is not possible to accurately and definitively predict. Some business sectors, such as the retail, hotel and tourism sectors, have reported material impacts on trading performance. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The data and information that informs and supports the Report Content is current as at the date of this report and (unless otherwise specifically stated in the Report) does not necessarily reflect the full impact of the COVID-19 Outbreak on the Australian economy, the asset(s) and any associated business operations to which the report relates. It is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event and the various programs and initiatives governments have adopted in attempting to address its impact. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong has been, and may be further, materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a longer lasting impact than we have assumed. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

Where we have sought to address the impact of the COVID-19 Outbreak in the Report, we have had to make estimates, assumptions, conclusions and judgements that (unless otherwise specifically stated in the Report) are not directly supported by available and reliable data and information. Any Report Content addressing the impact of the COVID-19 Outbreak on the asset(s) and any associated business operations to which the report relates or the Australian economy more broadly is (unless otherwise specifically stated in the Report) unsupported by specific and reliable data and information and must not be relied on.

To the maximum extent permitted by law, Urbis (its officers, employees and agents) expressly disclaim all liability and responsibility, whether direct or indirect, to any person (including the Instructing Party) in respect of any loss suffered or incurred as a result of the COVID-19 Outbreak materially impacting the Report Content, but only to the extent that such impact is not reflected in the data and information used to support the Report Content.

APPENDIX B: STAGE 4 CONSULTATION

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