

Broadhectare study 2013 profile

South East Queensland

Introduction

The preliminary estimated resident population of South East Queensland (hereafter referred to as SEQ) at 30 June 2012 was 3,202,000 persons (Source: ABS 3218.0). This is expected to increase to between 3,762,000 (low series) and 3,936,000 (high series) persons by 2021, representing population growth over the 2012–2021 period of between 560,000 (low series) and 734,000 (high series) (Source: Queensland Government Population Projections, 2013 edition).

Land stock

The total area of broadhectare land available in SEQ for residential development is 39,740 hectares, representing only a very small percentage of the total land area (Tables 1 and 2). This includes a number of areas which have been declared as Priority Development Areas for residential development by Economic Development Queensland.

Broadhectare land is defined as the amount of unconstrained residential land under the current planning scheme including existing residential developments approved by council.

Broadhectare land can be further classified as follows:

- urban residential broadhectare land — 30,323 hectares
- rural residential broadhectare land — 9,417 hectares.

The broadhectare study refers to 'rural residential' development as yielding three dwellings or less per hectare, or as otherwise defined in the planning scheme. Whilst development at 'standard urban density' and 'higher density' is classified as yielding between 4 to 20 dwellings and greater than 20 dwellings per hectare respectively.

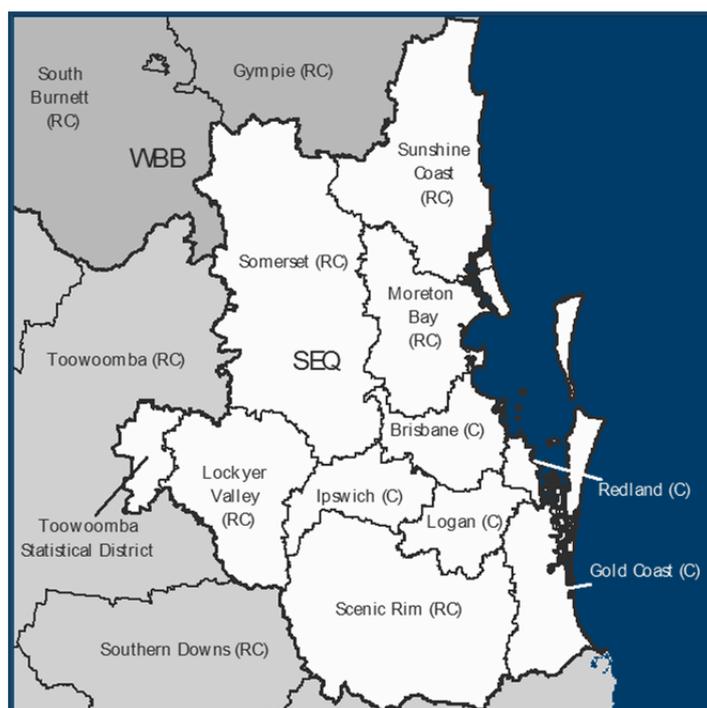


Table 1 South East Queensland land use profile

Land use category	Area	% of total
Suitable for urban residential broadhectare development	30,324 ha	1.32%
Suitable for rural residential broadhectare development	9,416 ha	0.41%
Assumed existing urban residential use	70,284 ha	3.07%
Assumed existing lower density residential use	159,214 ha	6.95%
Roads, watercourses and railway casements	143,396 ha	6.26%
Rural/Green/Open space	1,821,706 ha	79.57%
Balance area ^(a)	55,501 ha	2.42%

(a) Includes all land uses other than residential.

Dwelling yields

Table 2 shows 'theoretical dwelling yield' (the potential number of dwellings that could be constructed based on the identified land stock) and 'expected dwelling yield' (which takes into account factors affecting development of land such as ownership and land fragmentation).

Table 2 South East Queensland broadhectare stock and dwelling yield ^(a)

Timeframe	Broadhectare stock (hectares)				Theoretical dwelling yield (dwellings) ^(b)	Expected dwelling yield (dwellings) ^(c)			
	Higher density	Standard urban density	Rural density	Total stock		Higher density	Standard urban density	Rural density	Total dwellings
0-<2 years	245	3,385	3,687	7,317	45,175	10,458	30,869	3,847	45,175
2-<5 years	645	3,926	1,500	6,071	77,311	23,770	39,776	1,243	64,789
5-<10 years	945	5,420	746	7,111	115,566	45,538	54,914	1,907	102,359
10+ years	2,307	9,481	1,346	13,134	205,736	73,174	96,867	4,050	174,092
Not specified	737	3,233	2,138	6,108	85,878	39,070	28,729	2,922	70,721
Total	4,879	25,445	9,416	39,740	529,665	192,011	251,155	13,969	457,135

(a) Components may not sum exactly to totals due to rounding.

(b) Yield if all broadhectare stock is developed irrespective of ownership and/or fragmentation.

(c) Yield has been reduced to account for likelihood of development due to factors such as ownership and fragmentation.

The main points from Table 2 are:

- Broadhectare land is likely to yield approximately 457,100 dwellings.
- Development at higher density accounts for 42 per cent of the total expected dwelling yield.
- Development at standard urban density will account for almost 55 per cent of the total expected dwelling yield.

Stock composition

The broadhectare stock in SEQ is contained primarily within land parcels greater than 10 hectares in area (Table 3). For all broadhectare parcels, the difference between the overall parcel area (54,647 hectares) and the area available for development (39,740 hectares) indicates that some parcels are affected by physical or environmental constraints. The main points from Table 3 include:

- Residential stock is contained within 10,760 land parcels.
- Parcels less than or equal to 1.2 hectares account for over 51 per cent of all parcels.
- Of the urban broadhectare stock, almost 62 per cent is contained in parcels sized 10 hectares or more.
- Parcels sized 10 hectares or more account for over 58 per cent of the expected total dwelling yield from broadhectare land.

Table 3 South East Queensland broadhectare stock composition ^(a)

Parcel size categories (hectares)	Land parcels (number)	Total area of parcels (hectares)	Broadhectare area (hectares)			Expected dwelling yield (number)		
			Urban residential ^(b)	Rural residential	Total stock	Urban residential ^(b)	Rural residential	Total dwellings
<= 1.2	5529	3,389	3,291	446	3,737	59,840	270	60,109
1.3-2.0	1746	3,005	2,163	396	2,559	33,727	443	34,170
2.1-4.9	1924	6,375	3,696	1,282	4,978	57,074	2,136	59,210
5.0-9.9	612	4,370	2,460	897	3,357	35,006	1,483	36,489
10.0+	949	37,508	18,713	6,396	25,109	257,519	9,637	267,157
Total	10,760	54,647	30,324	9,416	39,740	443,166	13,969	457,135

(a) Components may not sum exactly to totals due to rounding.

(b) Includes dwellings at higher and standard urban densities.

Population capacity

Average household size for occupied private dwellings in SEQ at the time of the 2011 Census was 2.8 and 1.8 persons for houses and attached dwellings respectively. Table 4 shows a range of possible population yields for the total identified broadhectare stock in each density category by a range of household sizes. The current household sizes at the time of the 2011 Census are highlighted.

The main finding from Table 4 is that, depending on average household size, land from broadhectare development could accommodate between 905,100 and 1,270,800 people. Further development in existing residential areas, where the parcel size is less than 2,500 square metres, could also accommodate additional population.

Table 4 South East Queensland population yields based on a range of household sizes (persons) ^(a)

Development type	Number of dwellings	Household size (average persons per household)				
		2.4	2.6	2.8	3.0	3.2
Possible population yield						
Rural residential	13,969	33,526	36,319	39,113	41,907	44,701
Standard urban density residential	251,155	602,772	653,003	703,234	753,465	803,696
Household size (average persons per household)						
Possible population yield						
Higher density residential	192,011	268,815	307,218	345,620	384,022	422,424
Total	457,135	905,113	996,540	1,087,967	1,179,394	1,270,821

(a) Count of all persons enumerated in the dwelling on census night, including visitors from within Australia.

Excludes usual residents who were temporarily absent on census night.

Total potential dwelling yield

Land ownership and fragmentation of land are potential constraints to residential development, and adjustments have been made to the broadhectare stock by applying potential development rates to land parcels. Furthermore, to determine overall residential land supply for this study, existing vacant residential land stock below 2,500 square metres has been added to the broadhectare supply. Residential land supply based on these components indicates a total potential dwelling yield of 457,100 dwellings (See Table 5).

It is important to note that this dwelling yield does not include dwellings that would have been achieved through infill and redevelopment of smaller parcels below the broadhectare model threshold.

Years' supply — illustrative only

Evidently, not all future dwelling demand will be met through development of broadhectare land. Nevertheless, an indicator of the adequacy of the supply of residential land (broadhectare and vacant lots) can be calculated by comparing the total supply as indicated above with future demand.

To make an assessment of future demand and determine whether there is an adequate supply of residential land, three scenarios of dwelling projections have been used based on the Queensland Government's population projection series — low, medium and high. Figure 1 and Table 5 show, based on these scenarios, the amount of land supply in terms of years remaining.

Figure 1 South East Queensland projected demand for land stock based on dwelling projections

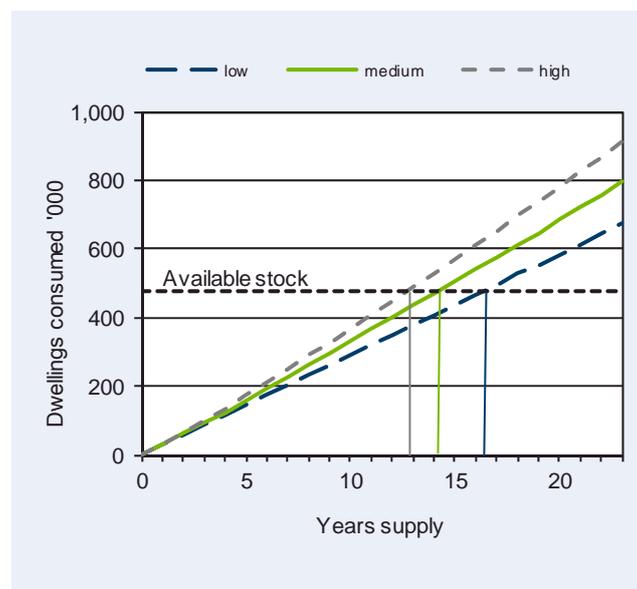


Table 5 also shows that developed land parcels that are vacant account for over four per cent of the total potential dwelling yield.

Table 5 South East Queensland broadhectare supply scenarios

Dwelling production scenario ^(a)	Demand for residential lots	Supply - Stock of residential lots			
	Dwellings required to 2036 ^(b)	Broadhectare dwelling yield ^(c)	Existing vacant land parcels ^(d)	Total potential dwellings ^(e)	Years supply ^(f)
Low trend	673,112	457,135	20,245	477,380	16
Medium trend	795,613	457,135	20,245	477,380	14
High trend	914,041	457,135	20,245	477,380	13

(a) Based on dwelling projection levels produced in 2013.

(b) Dwellings required to 2036 based on Government Statistician dwelling projections.

(c) Adjusted to take into account the propensity of development.

(d) Estimate of vacant residential parcels at September 2013.

(e) Supply of residential lots.

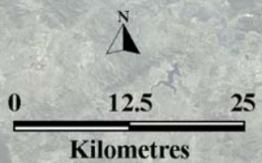
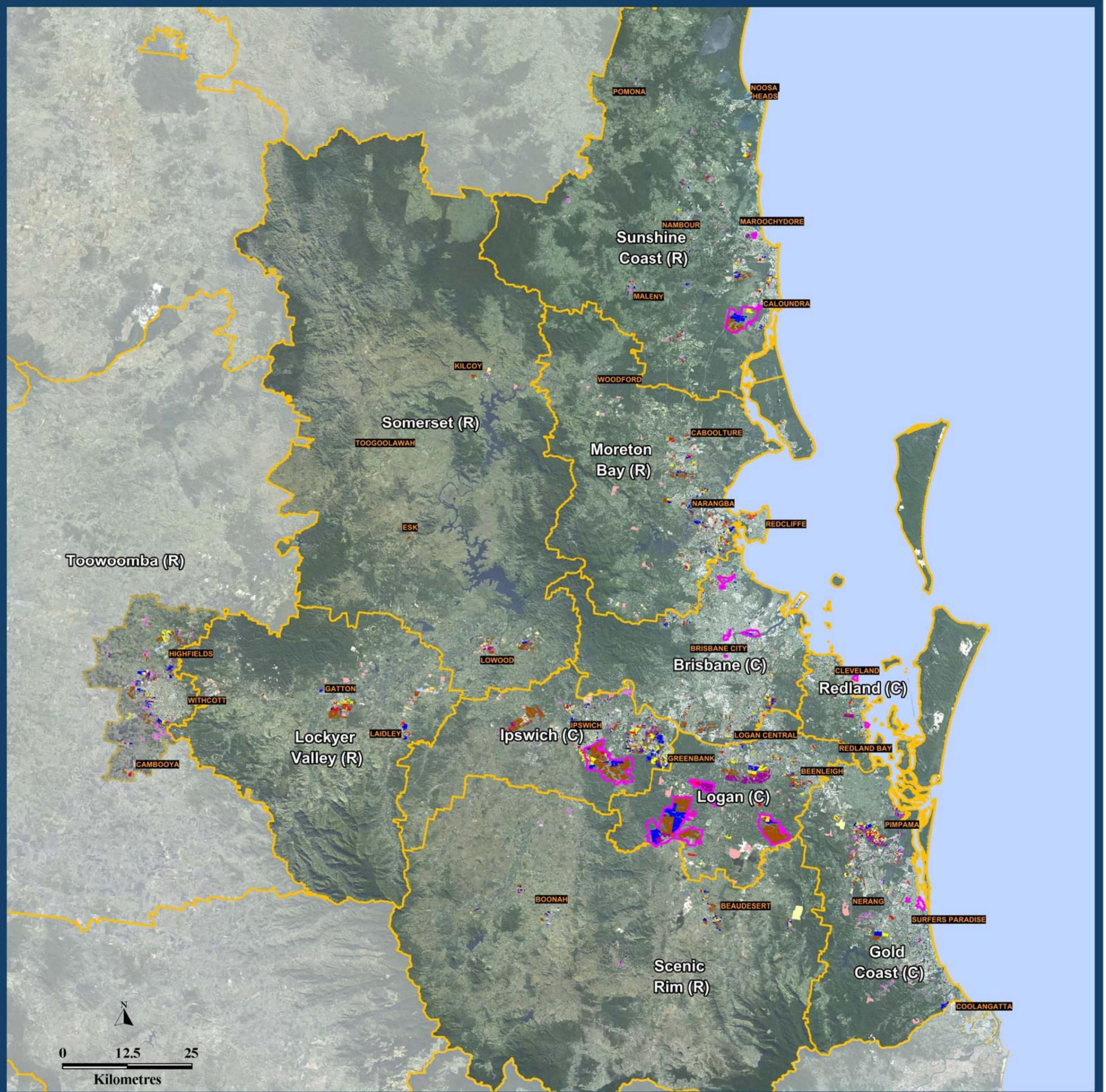
(f) Illustrative only, if no development occurs outside of broadhectare land.

Conclusion — South East Queensland

The study has estimated that the total area of broadhectare land available for residential development is 39,740 hectares. If this land were fully developed it has the potential to yield approximately 457,000 dwellings and accommodate 1,088,000 people, using current average household sizes.

Based on current medium series household projections and the expected broadhectare dwelling yield, the available residential land stock indicates approximately 14 years of supply.

Broadhectare study 2013 - South East Queensland



Legend

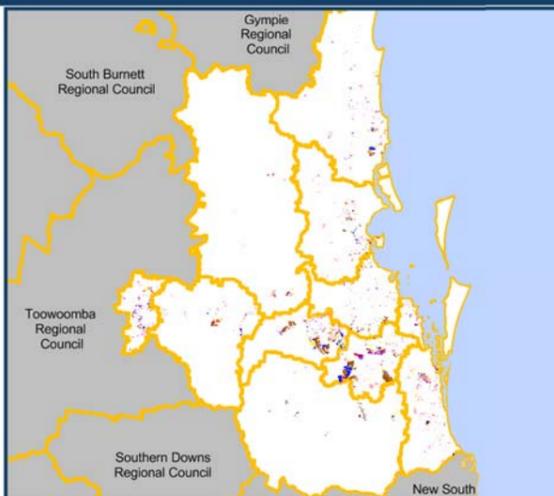
Broadhectare land

Timeframe	Urban residential	Rural residential
0 – 2 years	3,630 ha	3,687 ha
2 – 5 years	4,571 ha	1,500 ha
5 – 10 years	6,365 ha	746 ha
10+ years	11,788 ha	1,346 ha
Not specified	3,970 ha	2,138 ha

Land suitable and potentially available for residential development. Timeframes are indicative only.

Other map features

- Local government boundaries
- Major roads
- Priority Development Areas



Notes

This map indicates the areas which are suitable and potentially available for residential development. This map does not commit council to approve developments within these identified areas or within the indicated timeframes. This map forms part of the Broadhectare Study and is to be read in conjunction with the main text of the profile.

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