Residential Infill Development
South East Queensland – Number 3, July 2010

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Key points:

- There were 3,187 multiple dwelling infill projects identified in the planning pipeline within South East Queensland (SEQ) at December 2009, with the potential to contribute around 74,100 new dwellings (Table 1). This was a 10 per cent increase over the 67,500 potential infill multiple dwellings in SEQ identified at December 2008.

- Fifty-eight per cent of the potential SEQ infill multiple dwellings (42,925) at December 2009 were in projects that may be available within the short term as they held development permits (or some other approval).

- Projects that may be delivered in the medium term were those with preliminary approval or were still in the application stage. Medium term projects contributed the remaining 42 per cent (31,216) of potential dwellings.

- Brisbane and Gold Coast cities together accounted for around 71 per cent of dwellings in identified infill projects at December 2009 with 33,632 and 18,904 dwellings respectively.

- Moreton Bay and Sunshine Coast regional councils were the next largest contributors with 5,822 and 4,612 potential infill multiple dwellings respectively, followed by Logan City with 3,818 dwellings.

- There was a minor shift towards larger projects over the calendar year 2009. Developments with 50 or more dwellings increased from 10 per cent of total projects at December 2008 to 11 per cent at December 2009. Developments with 11 to 49 dwellings increased from 18 to 20 per cent over the same period.

- Infill residential building approvals declined by 31 per cent between calendar year 2008 (18,207 dwellings) and calendar year 2009 (12,632 dwellings). Approvals for separate houses within the existing urban area (EUA) declined by 28 per cent, while ‘other dwellings’ (attached dwellings) declined by one-third.

- The proportion of total dwelling approval activity occurring within the EUA (that is, infill) also declined over this period, from 71 per cent of total dwelling approvals in 2008 to 64 per cent in 2009.

Table 1: Infill multiple dwellings in live Material Change of Use (MCU) applications and approvals by category, by local government area, December 2009

<table>
<thead>
<tr>
<th>Local government area</th>
<th>Applications</th>
<th>Preliminary approvals</th>
<th>MEDIUM TERM</th>
<th>Other approvals</th>
<th>SHORT TERM</th>
<th>Total at Dec 2009</th>
<th>Total at Dec 2008</th>
<th>% change Dec 2008 to Dec 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>14,010</td>
<td>2,117</td>
<td>16,127</td>
<td>17,032</td>
<td>473</td>
<td>17,505</td>
<td>33,632</td>
<td>14</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>6,659</td>
<td>1,479</td>
<td>8,138</td>
<td>10,528</td>
<td>238</td>
<td>10,766</td>
<td>18,904</td>
<td>6</td>
</tr>
<tr>
<td>Ipswich</td>
<td>1,133</td>
<td>0</td>
<td>1,133</td>
<td>1,740</td>
<td>103</td>
<td>1,843</td>
<td>2,976</td>
<td>45</td>
</tr>
<tr>
<td>Lockyer Valley</td>
<td>100</td>
<td>0</td>
<td>100</td>
<td>73</td>
<td>58</td>
<td>131</td>
<td>231</td>
<td>32</td>
</tr>
<tr>
<td>Logan</td>
<td>917</td>
<td>463</td>
<td>1,380</td>
<td>2,310</td>
<td>128</td>
<td>2,438</td>
<td>3,818</td>
<td>7</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>1,659</td>
<td>0</td>
<td>1,659</td>
<td>3,927</td>
<td>236</td>
<td>4,163</td>
<td>5,822</td>
<td>-3</td>
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<tr>
<td>Redland</td>
<td>737</td>
<td>89</td>
<td>826</td>
<td>1,885</td>
<td>142</td>
<td>2,027</td>
<td>2,853</td>
<td>41</td>
</tr>
<tr>
<td>Scenic Rim</td>
<td>9</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>22</td>
<td>22</td>
<td>31</td>
<td>82</td>
</tr>
<tr>
<td>Somerset</td>
<td>4</td>
<td>0</td>
<td>4</td>
<td>24</td>
<td>4</td>
<td>28</td>
<td>32</td>
<td>-22</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>1,547</td>
<td>29</td>
<td>1,576</td>
<td>2,431</td>
<td>605</td>
<td>3,036</td>
<td>4,612</td>
<td>-6</td>
</tr>
<tr>
<td>Toowoomba</td>
<td>262</td>
<td>2</td>
<td>264</td>
<td>788</td>
<td>178</td>
<td>966</td>
<td>1,230</td>
<td>5</td>
</tr>
<tr>
<td>South East Queensland</td>
<td>27,037</td>
<td>4,179</td>
<td>31,216</td>
<td>40,738</td>
<td>2,187</td>
<td>42,925</td>
<td>74,141</td>
<td>10</td>
</tr>
</tbody>
</table>

1 Other approvals includes MCUs that were confirmed as having been approved but where it was not possible to identify the type of approval (that is, preliminary approval or development permit).

2 Moreton Bay Regional Council was unable to provide data prior to September 2006 for the former Redcliffe City. Dwelling yields for this council are therefore likely to be under-represented.

3 MCU data for Redland City Council is current to 17 December 2009, compared with data to 31 December 2009 for all other SEQ councils.

4 Toowoomba refers to the portion of Toowoomba Regional Council that falls within the SEQ Regional Plan study area, which equates to Toowoomba Statistical District plus one additional Census Collection District (3141706).

Source: OESR based on data extracts from local government development assessment databases, the Urban Land Development Authority (ULDA), Southbank Corporation and the Department of Communities.
Definitions & methodology

The residential infill development monitoring program of the Office of Economic and Statistical Research (OESR) captures data relating to future infill dwelling supply and building activity in SEQ.

The definition of infill development is location-based. Any residential development that occurs within the existing urban area (EUA) boundary is considered infill – whether for detached or attached housing, on vacant land or via redevelopment to increase dwelling density or to change uses from non-residential to residential.

The typical development pipeline for new multiple dwelling projects is represented in Figure 1. Multiple dwelling Material Change of Use (MCU) applications and approvals data supplied by SEQ local governments is the primary data source for the infill monitoring program.

Significant desktop research is undertaken by OESR to augment the local government multiple dwelling MCU information, particularly to establish or confirm dwelling numbers for projects. Applications refused by local government, lapsed applications and approvals and withdrawn applications are excluded.

This profile reports on potential infill multiple dwelling supply and therefore only includes projects not yet built. Projects identified as completed through analysis of registration of title data or review of aerial imagery are also excluded.

Multiple dwelling project data from the non-council approval bodies of the Urban Land Development Authority, Southbank Corporation and the Department of Communities is included in the results.

Multiple dwelling developments include those where more than one self-contained dwelling is planned for a property. This may range in size from the addition of a self-contained granny flat, through to duplexes, dual occupancies and townhouses, up to large-scale apartment towers.

This multiple dwelling project information supplements data captured via the Residential Land and Dwelling Activity monitoring program on the development of lots for new detached housing.

Further information on the residential infill program methodology and the EUA boundary can be found in the first residential infill profile, No. 1: November 2009, on the OESR website at www.oesr.qld.gov.au/pifu.

This third residential infill profile presents a summary of multiple dwelling project applications and approvals by SEQ local government as at 31 December 2009, except for Redland City where data was supplied up to 17 December 2009.

An analysis of Australian Bureau of Statistics’ residential building approvals data by dwelling type is also presented for calendar years 2008 and 2009.

Figure 1: Multiple dwelling development pipeline

![Figure 1: Multiple dwelling development pipeline](image)

Multiple dwelling infill projects at December 2009

The following is an analysis of ‘live’ multiple dwelling infill projects including Material Change of Use applications and approvals (for either preliminary approval or a development permit) at December 2009.

- At December 2009, there were 3,187 multiple dwelling infill projects in SEQ, with the potential to contribute an additional 74,141 dwellings.
- Around 55 per cent of the new infill multiple dwellings were in projects with development permits (40,738 dwellings), while 36 per cent were in projects still in the application stage (27,037 dwellings).
- Brisbane and Gold Coast cities accounted for 71 per cent of the SEQ total with 33,632 and 18,904 potential new dwellings respectively (Figure 2).
- Moreton Bay and Sunshine Coast regional councils contributed around 14 per cent of the SEQ total with 5,822 and 4,612 potential infill multiple dwellings respectively.
- This was followed by the cities of Logan (3,818 dwellings), Ipswich (2,976 dwellings) and Redland (2,853 dwellings).
- The western local governments of Toowoomba, Lockyer Valley, Somerset and Scenic Rim contributed around 1,500 potential infill multiple dwellings collectively at December 2009.
While the number of identified infill projects declined by two per cent between December 2008 and December 2009, the number of potential dwellings within these projects increased by 10 per cent from 67,524 to 74,141 over the same period.

- Brisbane City accounted for 61 per cent of this net growth over the year to December 2009 with an additional 4,028 potential infill dwellings in the planning pipeline.
- The number of infill multiple dwellings in projects with development permits in SEQ increased by 24 per cent from 32,759 at December 2008 to 40,738 at December 2009.
- Dwellings in projects still in the application stage (that is, not yet decided) declined by around six per cent (28,674 to 27,037 dwellings) over the same period.
- Scenic Rim (82 per cent), Ipswich (45 per cent) and Redland (41 per cent) recorded the largest proportional growth in potential infill dwellings between December 2008 and December 2009.
- Somerset (-22 per cent), Sunshine Coast (-6 per cent) and Moreton Bay (-3 per cent) were the only SEQ local governments to record declines in the number of potential infill multiple dwellings over the 12 months to December 2009 (Figure 3).

Source (Figures 2 & 3): OESR based on data extracts from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Communities.
Multiple dwelling project size

- Table 2 presents the number of SEQ infill projects and dwellings by project size at December 2008 and December 2009. Of the 3,187 identified multiple dwelling projects at December 2009, 69 per cent included 10 or fewer dwellings, 20 per cent contained between 11 and 49 dwellings and 11 per cent included 50 or more dwellings.

- Over the 12 months to December 2009, mid-size developments (11–49 dwellings) increased from 18 to 20 per cent of projects, while large developments of 50 or more dwellings increased from 10 to 11 per cent of total projects.

- While smaller developments accounted for 69 per cent of projects at December 2009, they contributed just 11 per cent of the 74,141 potential dwellings for SEQ.

- Of the 2,200 projects with 10 or fewer dwellings, 948 (43 per cent) developments contained just one or two new dwellings, such as self-contained relative’s accommodation, duplexes and dual occupancies.

- Identifying ULDA projects at December 2009 were generally larger in size. Of the 12 projects identified across Northshore Hamilton, Fitzgibbon and Bowen Hills, nine included 100 or more dwellings.

- Smaller developments contributed the largest shares of potential infill dwellings within the western local governments of Toowoomba, Lockyer Valley, Somerset and Scenic Rim (Figure 4).

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**Table 2: Projects and dwellings by development size in live infill multiple dwelling MCU applications and approvals, SEQ, December 2008 and December 2009**

<table>
<thead>
<tr>
<th>Size of project (dwellings)</th>
<th>As at December 2008</th>
<th>As at December 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No. of projects</td>
<td>% of projects</td>
</tr>
<tr>
<td>Small (10 or less)</td>
<td>2,353</td>
<td>72</td>
</tr>
<tr>
<td>Medium (11–49)</td>
<td>580</td>
<td>18</td>
</tr>
<tr>
<td>Large (50 or more)</td>
<td>319</td>
<td>10</td>
</tr>
<tr>
<td>Total</td>
<td>3,252</td>
<td>100</td>
</tr>
</tbody>
</table>

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**Figure 4: Proportion of dwellings in live MCU applications and approvals by development size, by local government area, December 2009**

Source (Table 2 & Figure 4): OESR based on data extracts from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Communities.
The Australian Bureau of Statistics releases residential building approvals data at the Census Collection District (CCD) level. Estimates of total infill residential development by dwelling type and local government were produced by aggregating CCD level data to match the existing urban area boundary. Local government area (LGA) totals derived from the aggregation of CCDs may not match published LGA totals.

- The proportion of SEQ residential dwelling approvals occurring within the existing urban area (that is, that were infill) was 64 per cent for the calendar year 2009 (Table 3). This was a decline from the calendar year 2008 result of 71 per cent of dwelling approvals within the EUA.
- The total number of SEQ infill dwelling approvals declined by 31 per cent from 18,207 for the calendar year 2008 to 12,632 for the calendar year 2009. All local governments in SEQ, with the exception of Toowoomba Regional Council, recorded a decline in total infill dwelling approvals over this period. Toowoomba infill dwelling approvals increased by 12 per cent from 304 dwellings in 2008 to 340 in 2009.
- SEQ separate house infill dwelling approvals declined by 28 per cent from 9,802 in 2008 to 7,018 in 2009. Toowoomba was again the only local government to record growth in separate house building approvals over this period with a 26 per cent increase from 151 to 191 dwellings (Figure 5).
- ‘Other dwelling’ (or attached dwelling) infill building approvals for SEQ declined by one-third from 8,405 in the calendar year 2008 to 5,614 in the calendar year 2009. Ninety per cent of ‘other dwelling’ building approvals during 2009 occurred within the existing urban area.
- Brisbane (91 per cent) and Redland (79 per cent) cities were the only local governments to record more than three-quarters of dwelling approvals as infill, that is within the existing urban area.
- ‘Other dwelling’ infill building approvals declined by more than half between 2008 and 2009 in the Sunshine Coast Regional Council (-77 per cent), and the Gold Coast (-55 per cent) and Logan (-54 per cent) cities (Figure 6).
- Of the coastal local governments, Sunshine Coast recorded the lowest proportion of ‘other dwelling’ building approvals within the EUA at just 64 per cent (202 of 318 approvals) during 2009.

Table 3: Infill and total dwelling approvals\(^1\) by type of dwelling by local government area, calendar year 2009

<table>
<thead>
<tr>
<th>Local government area (LGA)</th>
<th>Houses Inside EUA</th>
<th>Total for LGA</th>
<th>% Inside EUA</th>
<th>Other dwellings Inside EUA</th>
<th>Total for LGA</th>
<th>% Inside EUA</th>
<th>Total dwellings</th>
<th>% Inside EUA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>2,196</td>
<td>2,606</td>
<td>84</td>
<td>2,996</td>
<td>3,079</td>
<td>97</td>
<td>5,192</td>
<td>5,685</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>761</td>
<td>1,978</td>
<td>38</td>
<td>1,112</td>
<td>1,332</td>
<td>83</td>
<td>1,873</td>
<td>3,310</td>
</tr>
<tr>
<td>Ipswich</td>
<td>944</td>
<td>1,590</td>
<td>59</td>
<td>94</td>
<td>96</td>
<td>98</td>
<td>1,038</td>
<td>1,686</td>
</tr>
<tr>
<td>Lockyer Valley</td>
<td>17</td>
<td>254</td>
<td>7</td>
<td>2</td>
<td>10</td>
<td>20</td>
<td>19</td>
<td>264</td>
</tr>
<tr>
<td>Logan</td>
<td>298</td>
<td>725</td>
<td>41</td>
<td>78</td>
<td>82</td>
<td>95</td>
<td>376</td>
<td>807</td>
</tr>
<tr>
<td>Moreton Bay</td>
<td>1,140</td>
<td>2,895</td>
<td>39</td>
<td>824</td>
<td>945</td>
<td>87</td>
<td>1,964</td>
<td>3,840</td>
</tr>
<tr>
<td>Redland</td>
<td>434</td>
<td>587</td>
<td>74</td>
<td>151</td>
<td>151</td>
<td>100</td>
<td>585</td>
<td>738</td>
</tr>
<tr>
<td>Scenic Rim</td>
<td>13</td>
<td>222</td>
<td>6</td>
<td>2</td>
<td>2</td>
<td>100</td>
<td>15</td>
<td>224</td>
</tr>
<tr>
<td>Somerset</td>
<td>10</td>
<td>304</td>
<td>3</td>
<td>4</td>
<td>22</td>
<td>18</td>
<td>14</td>
<td>326</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>1,014</td>
<td>1,817</td>
<td>56</td>
<td>202</td>
<td>318</td>
<td>64</td>
<td>1,216</td>
<td>2,135</td>
</tr>
<tr>
<td>Toowoomba(^2)</td>
<td>191</td>
<td>647</td>
<td>29</td>
<td>149</td>
<td>199</td>
<td>75</td>
<td>340</td>
<td>846</td>
</tr>
<tr>
<td>South East Queensland</td>
<td>7,018</td>
<td>13,625</td>
<td>52</td>
<td>5,614</td>
<td>6,236</td>
<td>90</td>
<td>12,632</td>
<td>19,861</td>
</tr>
</tbody>
</table>

\(^1\) Dwelling approval totals for local governments may not match published figures as they are aggregated from Census Collection District level data.

\(^2\) Toowoomba refers to the portion of Toowoomba Regional Council that falls within the SEQ Regional Plan study area. This equates to Toowoomba Statistical District plus one additional Census Collection District (3141706).

Source: OESR, based on Australian Bureau of Statistics unpublished building approvals data aggregated from Census Collection District level.
Figure 5: Separate house infill building approvals by local government area, calendar years 2008 and 2009

Calendar year 2008 | Calendar year 2009
--- | ---
Brisbane | 2,500 | 3,000
Gold Coast | 1,000 | 1,500
Ipswich | 1,500 | 1,000
Lockyer Valley | 500 | 500
Logan | 2,000 | 2,500
Moreton Bay | 1,000 | 1,500
Redland | 500 | 500
Scenic Rim | 1,000 | 1,000
Somerset | 1,500 | 2,000
Sunshine Coast | 500 | 500
Toowoomba | 1,000 | 1,000

Figure 6: ‘Other dwelling’ infill building approvals by local government area, calendar years 2008 and 2009

Calendar year 2008 | Calendar year 2009
--- | ---
Brisbane | 4,000 | 3,500
Gold Coast | 2,500 | 3,000
Ipswich | 1,000 | 1,500
Lockyer Valley | 500 | 500
Logan | 2,000 | 2,500
Moreton Bay | 1,000 | 1,500
Redland | 500 | 500
Scenic Rim | 1,000 | 1,000
Somerset | 1,500 | 2,000
Sunshine Coast | 500 | 500
Toowoomba | 1,000 | 1,000

Source (Figures 5 & 6): OESR, based on Australian Bureau of Statistics unpublished building approvals data aggregated from Census Collection District level.