Office of Economic and Statistical Research
Queensland Treasury

Residential Infill Development Profile

South East Queensland – Number 6, June 2011

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This profile presents a summary of infill multiple dwelling project applications and approvals in South East Queensland (SEQ) by local government area as at 30 June 2011. An analysis of Australian Bureau of Statistics' residential building approvals data by dwelling type is also presented for 2009–10 and 2010–11.

Key findings

- There were 3,590 infill multiple dwelling projects identified in the planning pipeline within SEQ at June 2011, with the potential to contribute 82,073 new dwellings (Table 1). This was a 6.4% increase in the number of infill multiple dwellings over the 12 months from June 2010 (77,166 dwellings).
- The number of infill multiple dwellings in projects at the application stage declined by 31.7% from 23,970 at June 2010 to 16,360 at June 2011.
- Over the same period, the number of multiple dwellings in approved projects increased by 24.6% to 59,998 dwellings (this figure excludes preliminary approvals given the further requirement for development permits).
- Brisbane (40,471 dwellings) and Gold Coast (18,483) cities together accounted for 71.8% of the total SEQ multiple dwellings in identified infill projects at June 2011.
- The largest increases in infill multiple dwellings in the planning pipeline over the 12 months to June 2011 were recorded in Brisbane City (up 5,038 dwellings or 14.2%) and Moreton Bay Regional Council (up 556 dwellings or 9.6%).
- Infill multiple dwellings in the planning pipeline for the suburb of Brisbane City (CBD) increased by 39.3% over the year to June 2011, to 3,611. Substantial increases were also recorded for South Brisbane (81.7%), Hamilton (72.1%) and Woolloongabba (47.9%).
- Of the 3,590 identified infill multiple dwelling projects in SEQ at June 2011, 69.0% were small projects of 10 or fewer dwellings, 20.3% were medium-sized with 11–49 dwellings and 10.7% were larger projects with 50 or more dwellings.
- The proportion of building approvals for new dwellings in SEQ that were infill (that is, located within the existing urban area) was 64.7% in 2010–11 (13,167 approvals).

Table 1 Infill multiple dwellings in live Material Change of Use (MCU) applications and approvals by category, by SEQ local government areas, at June 2011

Local government area	Applications (1)	Preliminary approvals (2)	**MEDIUM TERM (1+2)**	Development permits (3)	Other approvals[1] (4)	**SHORT TERM (3+4)**	**Total at Jun 2011 (1+2+3+4)**	Total at Jun 2010	**% change Jun 2010 to Jun 2011**
Brisbane	8,183	3,274	**11,457**	28,019	995	**29,014**	**40,471**	35,433	**14.2%**
Gold Coast	4,754	1,516	**6,270**	12,109	104	**12,213**	**18,483**	19,161	**-3.5%**
Ipswich	317	-	**317**	2,717	68	**2,785**	**3,102**	3,097	**0.2%**
Lockyer Valley	66	66	**132**	114	32	**146**	**278**	243	**14.4%**
Logan	359	632	**991**	3,653	63	**3,716**	**4,707**	4,606	**2.2%**
Moreton Bay	1,297	-	**1,297**	4,950	92	**5,042**	**6,339**	5,783	**9.6%**
Redland	500	15	**515**	2,153	116	**2,269**	**2,784**	2,801	**-0.6%**
Scenic Rim	2	-	**2**	7	25	**32**	**34**	35	**-2.9%**
Somerset	-	-	**-**	17	-	**17**	**17**	27	**-37.0%**
Sunshine Coast	733	210	**943**	3,321	427	**3,748**	**4,691**	4,723	**-0.7%**
Toowoomba[2]	149	2	**151**	984	32	**1,016**	**1,167**	1,257	**-7.2%**
South East Queensland	16,360	5,715	**22,075**	58,044	1,954	**59,998**	**82,073**	77,166	**6.4%**

[1] Other approvals includes MCUs where it was not possible to identify the type of approval (that is, preliminary approval or development permit). These were typically older approvals. It also includes approvals granted by Southbank Corporation and the Department of Communities.

[2] In this profile, 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).

Sources: 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 and 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 related building activity in SEQ.

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

The Residential Land Development Activity monitoring program reports on land in the development pipeline involving subdivision through Reconfiguring a Lot approvals and lot production. This profile supplements this information by providing data on the development of multiple dwelling projects.

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

Multiple dwelling project data from non-council approval bodies such as the Urban Land Development Authority (ULDA), Southbank Corporation and the Department of Communities are also included in the results.

Multiple dwelling developments include those where more than one self-contained dwelling is planned for a parcel, or where there is one dwelling per lot and they are subject to a Community Titles Scheme. This includes self-contained relative's accommodation, duplexes and dual occupancies, townhouses and apartments.

OESR performs additional work to clarify dwelling numbers in projects and to remove applications and approvals that were refused, lapsed or withdrawn.

As this profile only reports on potential infill multiple dwellings within the planning pipeline, further analysis is performed to identify and exclude projects that have been built.

Figures 2, 3 and 4 present an example of registration of title data and aerial imagery used to identify and exclude a completed project.

Further information on the residential infill program methodology and the EUA boundary can be found on the OESR website at www.oesr.qld.gov.au.

Figure 1 Typical multiple dwelling development pipeline

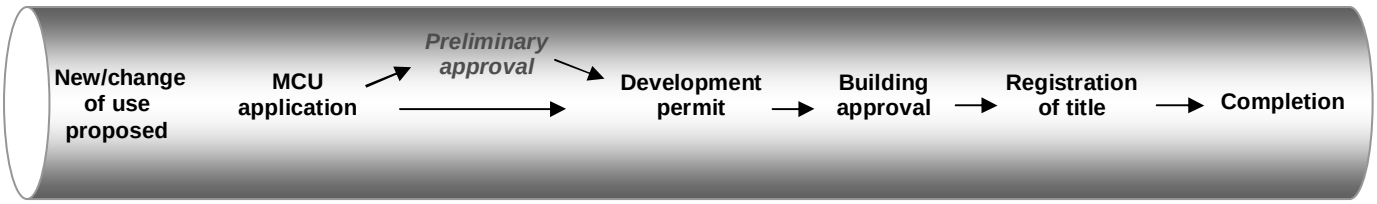


Figure 2 Spatial extent (in red) of development permit for 24 townhouses approved July 2007

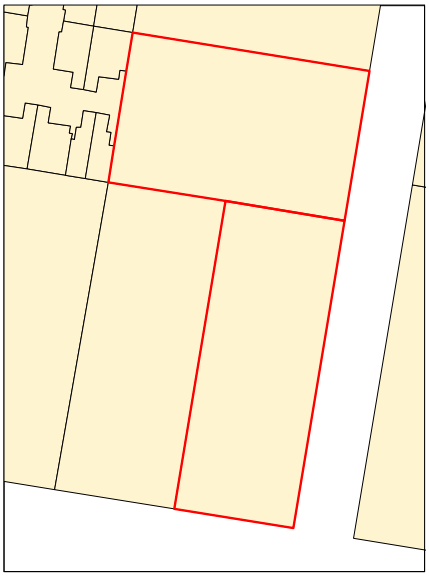


Figure 3 Registration of title for 24 townhouses in March quarter 2009 (in blue)

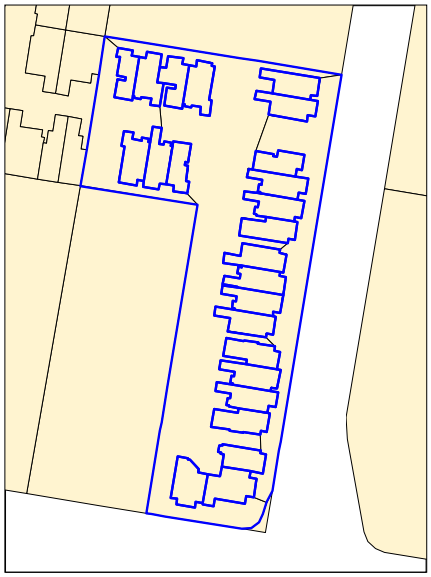


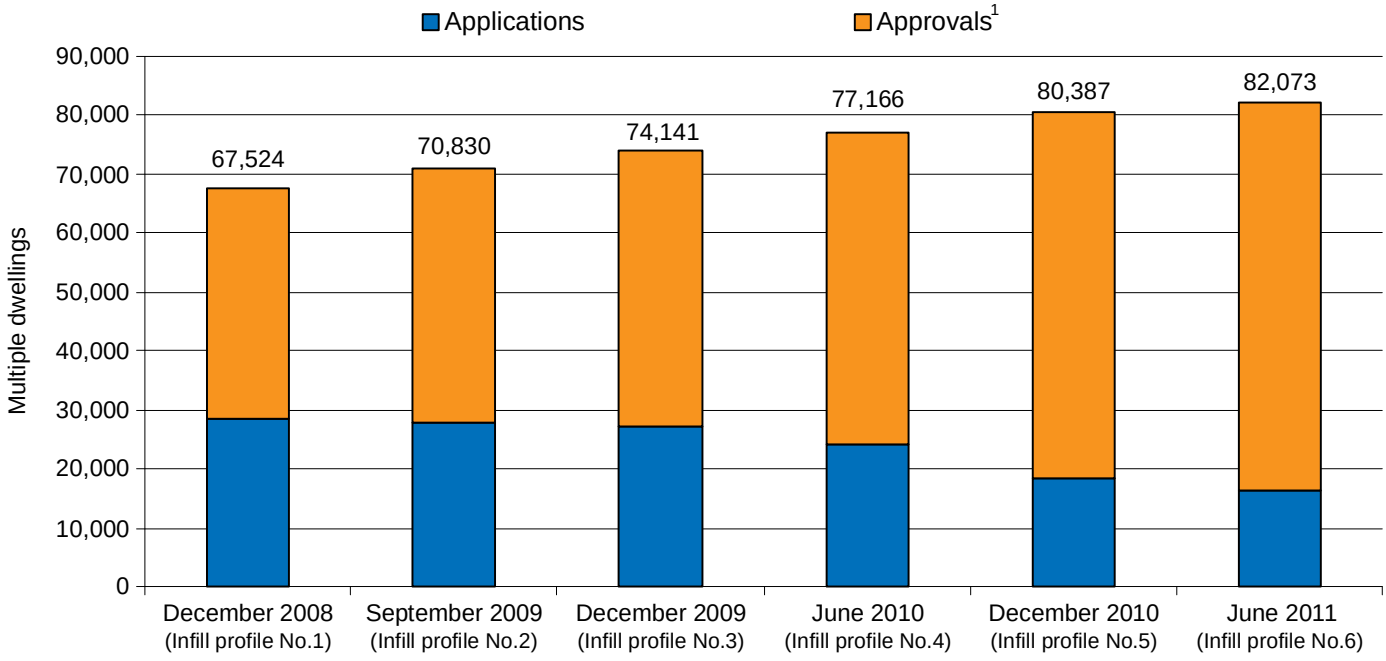
Figure 4 Aerial imagery flown mid to late 2009 showing completed development

Sources: Figure 2 – Dept Environment and Resource Management (DERM) Digital Cadastral Database (DCDB) at June 2007; OESR Infill MCU database. Figure 3 – DERM DCDB at September 2009; OESR lot registration database (based on DERM registration of title data). Figure 4 – DERM aerial imagery flown approximately August-October 2009; OESR Infill MCU database.

Infill multiple dwelling projects in SEQ at June 2011

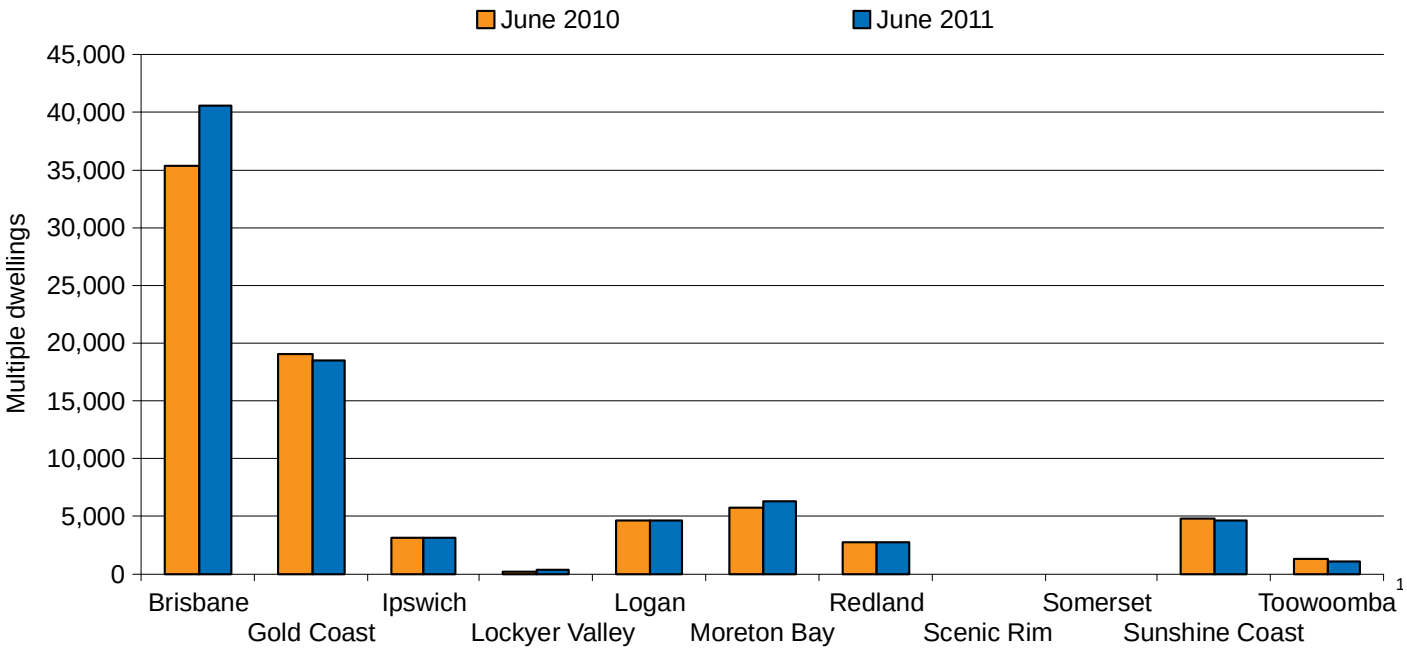
- The total number of infill multiple dwellings in the planning pipeline increased across each of the six infill profile reporting periods (Figure 5).
- At 30 June 2011, there were 3,590 multiple dwelling infill projects in SEQ, with the potential to contribute an additional 82,073 dwellings. This was an increase of 2.3% in the number of identified projects and 6.4% in the number of dwellings over the 12 months from June 2010.
- The number of infill multiple dwellings in projects awaiting decision (at the application stage) has declined over each of the six reporting periods to date. Over the 12 months to June 2011, the number of infill multiple dwellings within applications fell 31.7% from 23,970 to 16,360.
- This decline in dwellings within MCU applications may be due to a slowing in the number of new multiple dwelling projects submitted for planning approval, and/or a reduction in the time taken for projects to progress from application to approval stage (for example, for smaller projects such as dual occupancies).
- The number of dwellings within approved projects increased by 24.6% over the year to June 2011, from 48,152 to 59,998 dwellings. 'Approved projects' excludes those with preliminary approvals only, given the further requirement for development permits.
- While the stock of infill multiple dwelling projects with planning approval has increased in each successive reporting period, it should be noted that not all approved projects will proceed through to construction and completion.
- Brisbane and Gold Coast cities accounted for 71.8% of the SEQ total with 40,471 and 18,483 potential new dwellings respectively at June 2011 (Figure 6).
- Moreton Bay Regional Council recorded the third highest number in SEQ with 6,339 infill multiple dwellings in the planning pipeline, followed by Logan City (4,707) and Sunshine Coast Regional Council (4,691).
- The largest increase in infill multiple dwellings over the year to June 2011 was recorded in Brisbane City, with an additional 5,038 dwellings to reach 40,471 (growth of 14.2%).
- Moreton Bay also recorded a substantial increase in the number of identified infill multiple dwellings, up 9.6% from 5,783 to 6,339 over the same period.
- The largest declines in infill multiple dwellings were recorded in Toowoomba (-7.2%) and Gold Coast (-3.5%) over the year to June 2011.

Figure 5 Infill multiple dwellings in live MCUs, SEQ, December 2008 to June 2011



[1] Approvals include preliminary approvals, development permits and approval types not able to be identified (typically older approvals).
Source: OESR, based on data extracts from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Communities.

Figure 6 Infill multiple dwellings in live MCUs by SEQ local government areas, at June 2010 and June 2011



[1] In this profile, 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 ULDA, Southbank Corporation and the Department of Communities.

Infill multiple dwelling project size

- Table 2 presents the number of SEQ infill projects and dwellings by project size at June 2010 and June 2011.
- Of the 3,590 identified multiple dwelling projects in SEQ at June 2011, 69.0% included 10 or fewer dwellings, 20.3% between 11 and 49 dwellings and 10.7% included 50 or more dwellings.
- The proportion of SEQ's infill multiple dwellings arising from projects of 10 or fewer dwellings declined over the 12 months to June 2011, from 12.0% to 11.4%.
- Of the 2,478 SEQ projects with 10 or fewer dwellings at June 2011, 1,105 (44.6%) included just one or two new dwellings, such as self-contained relative's accommodation and dual occupancies.
- Almost 80% of the total growth in SEQ infill multiple dwellings over the year to June 2011 occurred in the 'large project' category (of 50 or more dwellings), increasing from 51,908 to 55,798.
- There were 196 infill multiple dwelling projects in SEQ at June 2011 with 100 or more dwellings each. Around 78% of these projects were in Brisbane and Gold Coast cities, with the potential to yield 36,198 new dwellings collectively.

Table 2 Projects and dwellings by project size in live infill multiple dwelling MCU applications and approvals, SEQ, at June 2010 and June 2011

	at June 2010				at June 2011			
Size of project (dwellings)	No. of projects	% of projects	No. of dwellings	% of dwellings	No. of projects	% of projects	No. of dwellings	% of dwellings
Small (10 or fewer)	2,441	69.5	9,257	12.0	2,478	69.0	9,323	11.4
Medium (11–49)	711	20.3	16,001	20.7	730	20.3	16,952	20.6
Large (50 or more)	359	10.2	51,908	67.3	382	10.7	55,798	68.0
Total	**3,511**	**100.0**	**77,166**	**100.0**	**3,590**	**100.0**	**82,073**	**100.0**

Source: OESR, based on data extracts from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Communities.

Top ranked suburbs by local government area

- Table 3 presents the top 10 suburbs in Brisbane City ranked in descending order by number of infill multiple dwellings in the planning pipeline at June 2011. These top 10 suburbs accounted for 45.0% of the total infill multiple dwellings for Brisbane City with 18,195 of the total of 40,471 at June 2011.
- Infill multiple dwellings in the planning pipeline within the suburb of Brisbane City (CBD) increased by 39.3% over the year to June 2011, to 3,611. Substantial increases were also recorded for South Brisbane (81.7% to 1,899), Hamilton (72.1% to 1,984), Woolloongabba (47.9% to 1,454) and Fortitude Valley (30.9% to 1,707) over the same period.
- Just over one-third of Gold Coast City's total infill multiple dwellings at June 2011 were in the suburbs of Surfers Paradise (3,371) and Southport (2,975) (Table 4).
- Goodna was the highest ranked suburb in Ipswich City with 532 dwellings across 21 projects, followed by Redbank Plains with 345 dwellings across 35 projects.
- The top five suburbs in Logan City accounted for almost half of the total for that local government area. The highest ranked suburb was Beenleigh with 615 dwellings.
- In Moreton Bay Regional Council, the suburbs of Kallangur, Murrumba Downs and Caboolture each included more than 600 infill multiple dwellings in the planning pipeline.
- A large proportion of Redland City's infill multiple dwellings at June 2011 were located in Cleveland, with 1,236 dwellings or 44.4% of the city's total.
- Sippy Downs was the highest ranked suburb in Sunshine Coast Regional Council at June 2011 with 461 identified infill multiple dwellings across four projects.
- Within Toowoomba Regional Council, South Toowoomba was the highest ranked suburb with 209 infill multiple dwellings at June 2011.

Table 3 Top 10 suburbs in Brisbane City ranked by multiple dwellings in live MCUs, at June 2011

	Suburb	Projects	Dwellings
1	Brisbane City (CBD)	20	3,611
2	Newstead	14	2,296
3	Hamilton	16	1,984
4	South Brisbane	29	1,899
5	Fortitude Valley	19	1,707
6	West End	30	1,516
7	Woolloongabba	15	1,454
8	Chermside	37	1,375
9	Bowen Hills	15	1,294
10	Calamvale	23	1,059

Table 4 Top suburbs by local government area, ranked by infill multiple dwellings in live MCUs, at June 2011

Gold Coast	Projects	Dwellings
1 Surfers Paradise	40	3,371
2 Southport	81	2,975
3 Labrador	38	1,220
4 Hope Island	12	1,012
5 Clear Island Waters	1	970

Ipswich	Projects	Dwellings
1 Goodna	21	532
2 Redbank Plains	35	345
3 Bundamba	20	224
4 Riverview	2	205
5 Ipswich	12	196

Logan	Projects	Dwellings
1 Beenleigh	26	615
2 Eagleby	14	451
3 Marsden	32	447
4 Daisy Hill	5	404
5 Kingston	19	297

Moreton Bay	Projects	Dwellings
1 Kallangur	23	849
2 Murrumba Downs	9	641
3 Caboolture	44	608
4 Mango Hill	9	447
5 Scarborough	26	372

Redland	Projects	Dwellings
1 Cleveland	55	1,236
2 Capalaba	19	404
3 Redland Bay	30	314
4 Wellington Point	18	193
5 Birkdale	26	187

Sunshine Coast	Projects	Dwellings
1 Sippy Downs	4	461
2 Noosa Heads	18	375
3 Mooloolaba	18	351
4 Maroochydore	36	276
5 Kings Beach	12	239

Toowoomba	Projects	Dwellings
1 South Toowoomba	18	209
2 Newtown	36	149
3 Middle Ridge	5	145
4 Harristown	23	139
5 Wilsonton	15	95

Lockyer Valley	Projects	Dwellings
1 Gatton	24	222
2 Forest Hill	2	29
3 Helidon	3	27

Scenic Rim	Projects	Dwellings
1 Boonah	3	13
2 Beaudesert	2	10
3 North Tamborine	6	7

Somerset	Projects	Dwellings
1 Esk	1	7
2 Kilcoy	1	4
3 Toogoolawah	1	2

Sources (Tables 3 and 4): OESR, based on data extracts from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Communities.

Redevelopment of sites for infill multiple dwelling developments in Brisbane City

This section reports on preliminary OESR research into the redevelopment of infill sites for multiple dwelling developments.

Redevelopment is defined in this context as the change of use of an urban land parcel from non-residential to residential, or if already residential in use, an increase in dwelling yield or density.

Results for Brisbane City are presented based on documents lodged with council for Material Change of Use applications for multiple dwellings. The current use of the development site at the time of application was collected, as well as the number of dwellings to be lost (if any) through removal or demolition.

Only infill MCU applications lodged, and approvals granted, with Brisbane City Council by 30 June 2011 were included in the analysis.

Infill multiple dwellings under the jurisdiction of the ULDA, Southbank Corporation and the Department of Communities were not included due to difficulties in sourcing documentation regarding current use at time of application. For this reason, the total dwelling yield for Brisbane City in Table 5 will not match that presented in Table 1.

- At June 2011, 98.1% of Brisbane's infill multiple dwelling projects were located on sites that had a previous urban use. The remaining 1.9% of sites were either non-urban in nature (a turf farm) or had not ever been previously developed (Table 5).
- Around three-quarters (76.6%) of infill multiple dwelling project sites in Brisbane City had an existing residential use at the time of application, at 982 of the 1,282 sites assessed.
- Most of these residential redevelopment sites (793 or 80.8%) comprised detached houses only. There were 106 'mixed use' sites which included a residential component and 83 sites which were solely 'other residential' in use at the time of application, such as units and apartments.
- Smaller infill projects of 10 or fewer dwellings were more often proposed for redevelopment sites with an existing residential use at the time of application. Of the 834 smaller infill projects assessed, 725 or 86.9% were on residential redevelopment sites.
- Conversely, larger infill projects of 50 or more dwellings were more often proposed on redevelopment sites that were non-residential in use, or that had already been cleared at the time of application (previous use unknown). Of the 163 sites with larger proposed infill projects of 50 or more dwellings, just 60 or 36.8% of the sites had a residential use at the time of application.
- Based on documentation lodged with MCU applications, around three-quarters (74.9%) of infill projects on residential redevelopment sites will involve dwelling loss through demolition or removal.
- The total loss was estimated at 1,133 dwellings, or around 3.1% of the total dwelling yield of 36,308.

Table 5 Infill multiple dwelling projects and dwelling yields in live MCUs by current use at time of application, Brisbane City[1], at June 2011

Current use at time of application	*Projects*	*Dwelling yield*
Commercial	38	1,865
Community	35	2,072
Industrial	25	1,497
Mixed use, no residential	41	6,020
Non-urban	1	252
Retail	20	1,586
Previously undeveloped	23	2,621
Vacant[2]	117	5,600
Total 'non-residential' current use	*300*	*21,513*
Detached house/s	793	8,714
Other residential (units, apartments)	83	1,442
Mixed use, including residential	106	4,639
Total 'residential' current use	*982*	*14,795*
Total	**1,282**	**36,308**

[1] MCUs lodged with Brisbane City Council only; does not include MCUs with other approval bodies such as the ULDA, Southbank Corporation and the Department of Communities.
[2] Vacant as described by the applicant at the time of lodging the development application. Previous use prior to clearing could potentially have included residential.
Source: OESR, based on data extracts from Brisbane City Council's development assessment database.

Building approvals for new dwellings

While MCU development permits provide planning permission for the nature of use to change, a new development must also be granted building approval before construction may commence.

The Australian Bureau of Statistics releases residential building approvals data at the Census Collection District (CD) level. Estimates of total infill residential development by dwelling type and local government area were produced by aggregating CD level data to match the existing urban area boundary. Local government area (LGA) totals derived from the aggregation of CDs may not match published LGA totals and are provided in Table 6 for completeness only.

South East Queensland

- The share of SEQ residential building approvals that were infill (that is, that were located within the existing urban area) was 64.7% during 2010–11 (Table 6). This represented a small decrease from the 65.1% share recorded during 2009–10.
- SEQ infill dwelling approvals declined by 17.0% from 15,867 in 2009–10 to 13,167 in 2010–11. Separate houses accounted for 46.3% of the SEQ total with 6,092 approvals in 2010–11, while 'other dwellings' (such as attached dwellings) contributed the remaining 53.7% with 7,075 approvals.
- Around half (50.9%) of the separate house dwelling approvals in SEQ during 2010–11 were located within the existing urban area. This proportion is expected to decline as remnant broadhectare land within the existing urban area is consumed.
- 'Other dwelling' infill building approvals for SEQ decreased by 13.6% from 8,192 in 2009–10 to 7,075 in 2010–11. Most (84.4%) of the total 'other dwelling' building approvals in SEQ occurred within the existing urban area during 2010–11.

By local government area

- Logan (176.0%), Somerset (113.6%) and Lockyer Valley (78.9%) were the only SEQ local governments to record growth in infill dwelling approvals over the period 2009–10 to 2010–11. Logan City's infill dwelling approvals more than doubled from 626 during 2009–10 to 1,728 during 2010–11 (adjusted data; please see footnote 2).
- Infill dwelling approvals in Redland City decreased by 46.9% from 911 in 2009–10 to 484 in 2010–11, the largest percentage decline of all SEQ local governments. Brisbane and Gold Coast infill dwelling approvals declined by 21.7% and 20.4% respectively over the same period.
- Brisbane (92.5%) and Redland (67.1%) cities recorded the largest proportions of total dwelling approvals as infill during 2010–11.
- While most SEQ local governments recorded declines in separate house and 'other dwelling' approvals over the period 2009–10 to 2010–11 (Figures 7 and 8), Logan City recorded substantial growth in approvals across both dwelling types.

Table 6 Infill and total residential building approvals[1] by type of dwelling, by SEQ local government areas, 2010–11

	Houses			Other dwellings			Total dwellings		
Local government area (LGA)	Inside EUA	Total for LGA	**% inside EUA**	Inside EUA	Total for LGA	**% inside EUA**	Inside EUA	Total for LGA	**% inside EUA**
Brisbane	1,774	2,144	**82.7**	3,893	3,982	**97.8**	5,667	6,126	**92.5**
Gold Coast	512	1,462	**35.0**	963	1,184	**81.3**	1,475	2,646	**55.7**
Ipswich	849	1,738	**48.8**	193	213	**90.6**	1,042	1,951	**53.4**
Lockyer Valley	15	221	**6.8**	19	21	**90.5**	34	242	**14.0**
Logan[2]	948	1,874	**50.6**	780	839	**93.0**	1,728	2,713	**63.7**
Moreton Bay	556	1,683	**33.0**	689	1,092	**63.1**	1,245	2,775	**44.9**
Redland	334	512	**65.2**	149	208	**71.6**	483	720	**67.1**
Scenic Rim	18	114	**15.8**	-	7	**0.0**	18	121	**14.9**
Somerset	45	242	**18.6**	2	2	**100.0**	47	244	**19.3**
Sunshine Coast	908	1,486	**61.1**	238	678	**35.1**	1,146	2,164	**53.0**
Toowoomba[3]	133	484	**27.5**	149	156	**95.5**	282	640	**44.1**
SEQ total	**6,092**	**11,960**	**50.9**	**7,075**	**8,382**	**84.4**	**13,167**	**20,342**	**64.7**

[1] Totals for local governments may not match published figures as they are aggregated from Census Collection District (CD) level data.

[2] Logan City data has been adjusted upwards to account for under-reporting in the unpublished CD level building approvals data supplied by the ABS for 2010–11 (under-reporting by 29% for houses and 27% for other dwellings compared with published data).

[3] In this profile, 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).

Sources: OESR, based on Australian Bureau of Statistics unpublished building approvals data aggregated from Census Collection District level.

Figure 7 Separate house infill building approvals by SEQ local government areas, 2009–10 and 2010–11

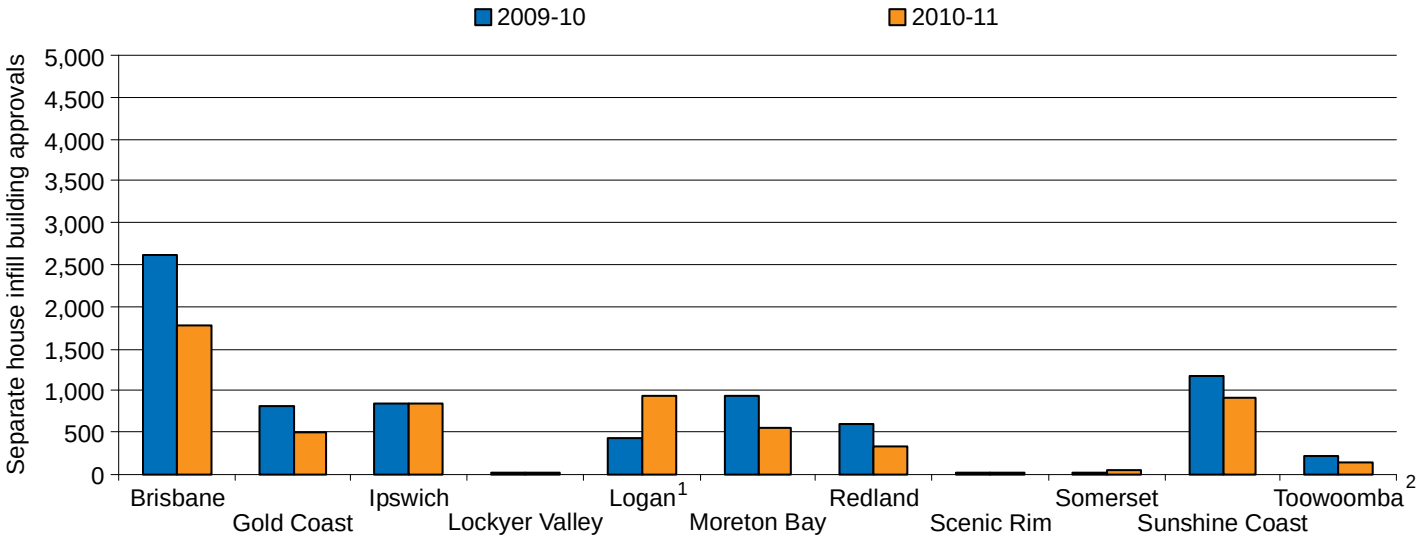
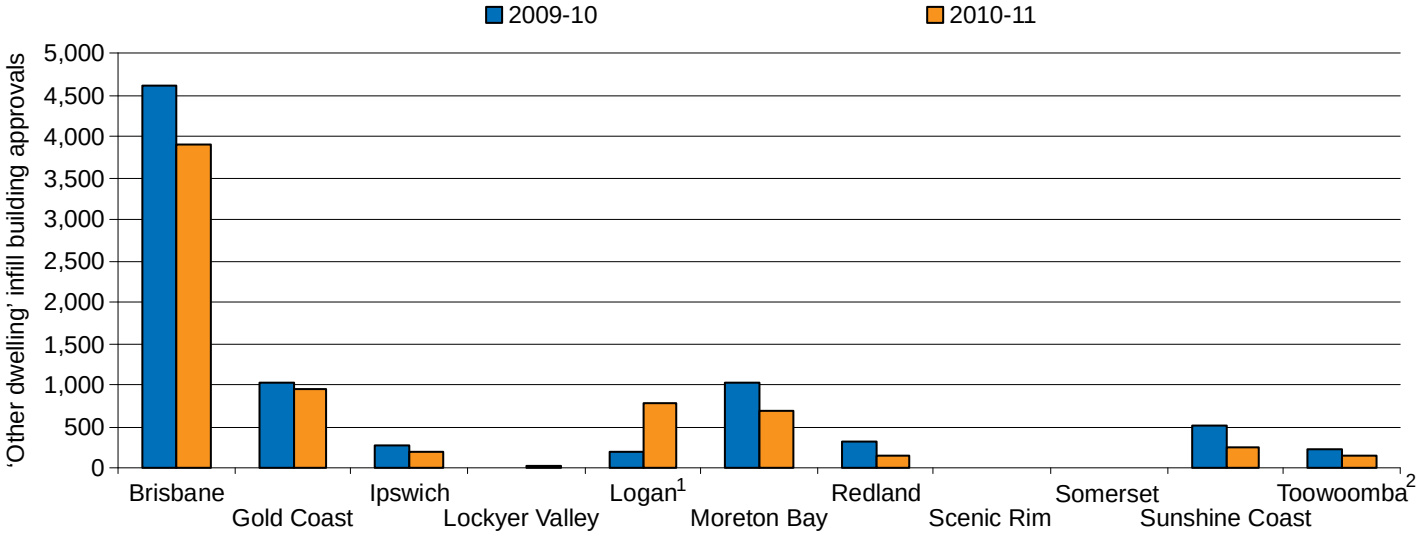


Figure 8 'Other dwelling' infill building approvals by SEQ local government areas, 2009–10 and 2010–11



[1] Logan City data presented in Figures 7 and 8 have been adjusted upwards to account for under-reporting in the unpublished CD level building approvals data supplied by the ABS for 2010–11 (under-reporting by 29% for houses and 27% for other dwellings compared with published data).

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Sources (Figures 7 and 8): OESR, based on Australian Bureau of Statistics unpublished building approvals data aggregated from Census Collection District level.

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