

# Residential Infill Development Profile

## South East Queensland – Number 7, December 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 31 December 2011. An analysis of Australian Bureau of Statistics' residential building approvals data by dwelling type is also presented for 2010 and 2011.

### Key findings

- There were 3,223 infill multiple dwelling projects identified in the planning pipeline within SEQ at December 2011, with the potential to contribute 80,688 new dwellings (Table 1). This was similar to the number of infill multiple dwellings as at December 2010 (80,387 dwellings).
- The number of infill multiple dwellings in projects at the application stage declined by 28.9% from 18,336 at December 2010 to 13,039 at December 2011.
- Over the same period, the number of multiple dwellings in approved projects increased by 9.1% to 61,754 dwellings (this figure excludes preliminary approvals given the further requirement for development permits).
- Brisbane (40,283 dwellings) and Gold Coast (17,929) cities together accounted for 72.1% of the total SEQ multiple dwellings in identified infill projects at December 2011.
- The only local government areas that had an increase in infill multiple dwellings in the planning pipeline over the 12 months to December 2011 were Brisbane City (up 1,275 dwellings or 3.3%) and Gold Coast City (up 12 dwellings or 0.1%).
- Of the 3,223 identified infill multiple dwelling projects in SEQ at December 2011, 66.0% were small projects of 10 or fewer dwellings, 21.7% were medium-sized with 11–49 dwellings and 12.3% 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 69.7% in 2011 (12,831 approvals). This represented a small increase from the 67.4% share recorded during 2010.

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

Local government area	Applications (1)	Preliminary approvals (2)	<b>MEDIUM TERM (1+2)</b>	Development permits (3)	Other approvals <sup>1</sup> (4)	<b>SHORT TERM (3+4)</b>	<b>Total at Dec 2011 (1+2+3+4)</b>	Total at Dec 2010	<b>% change Dec 2010 to Dec 2011</b>
Brisbane	7,756	3,073	<b>10,829</b>	28,701	753	<b>29,454</b>	<b>40,283</b>	39,008	<b>3.3%</b>
Gold Coast	2,718	2,004	<b>4,722</b>	13,065	142	<b>13,207</b>	<b>17,929</b>	17,917	<b>0.1%</b>
Ipswich	293	-	<b>293</b>	2,651	34	<b>2,685</b>	<b>2,978</b>	3,086	<b>-3.5%</b>
Lockyer Valley	44	66	<b>110</b>	127	24	<b>151</b>	<b>261</b>	297	<b>-12.1%</b>
Logan	518	519	<b>1,037</b>	3,598	48	<b>3,646</b>	<b>4,683</b>	4,738	<b>-1.2%</b>
Moreton Bay	919	-	<b>919</b>	5,445	74	<b>5,519</b>	<b>6,438</b>	6,609	<b>-2.6%</b>
Redland	489	15	<b>504</b>	2,182	20	<b>2,202</b>	<b>2,706</b>	2,959	<b>-8.6%</b>
Scenic Rim	2	-	<b>2</b>	9	18	<b>27</b>	<b>29</b>	32	<b>-9.4%</b>
Somerset	-	-	<b>-</b>	17	-	<b>17</b>	<b>17</b>	27	<b>-37.0%</b>
Sunshine Coast	269	216	<b>485</b>	3,552	300	<b>3,852</b>	<b>4,337</b>	4,461	<b>-2.8%</b>
Toowoomba <sup>2</sup>	31	2	<b>33</b>	962	32	<b>994</b>	<b>1,027</b>	1,253	<b>-18.0%</b>
<b>South East Queensland</b>	<b>13,039</b>	<b>5,895</b>	<b>18,934</b>	<b>60,309</b>	<b>1,445</b>	<b>61,754</b>	<b>80,688</b>	<b>80,387</b>	<b>0.4%</b>

<sup>1</sup> 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 Housing and Public Works.

<sup>2</sup> 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 as at December 2011 from local government development assessment databases, the Urban Land Development Authority (ULDA), Southbank Corporation and the Department of Housing and Public Works.

## 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 are also included in the results. This includes data current to 31 December 2011 from the Department of Housing and Public Works, the Urban Land Development Authority (ULDA) and Southbank Corporation.

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](http://www.oesr.qld.gov.au).

Figure 1 Typical multiple dwelling development pipeline

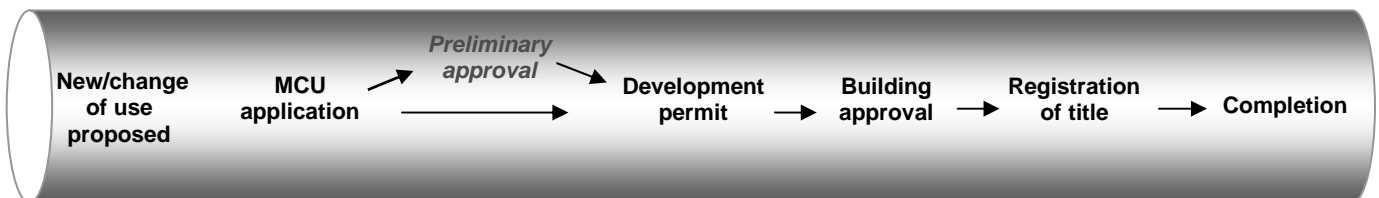


Figure 2 Spatial extent (in red) of development permit for 16 townhouses approved September 2006

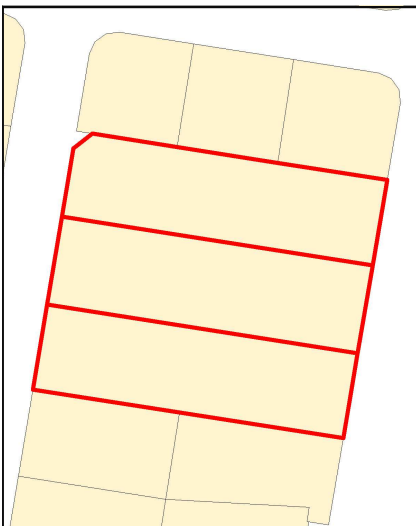


Figure 3 Registration of title for 16 townhouses in March quarter 2011 (in blue)

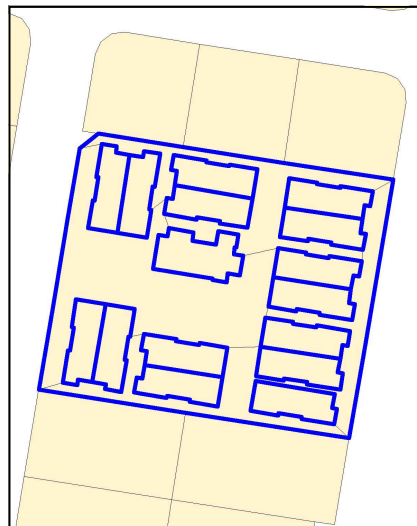


Figure 4 Aerial imagery flown mid 2011 showing completed development

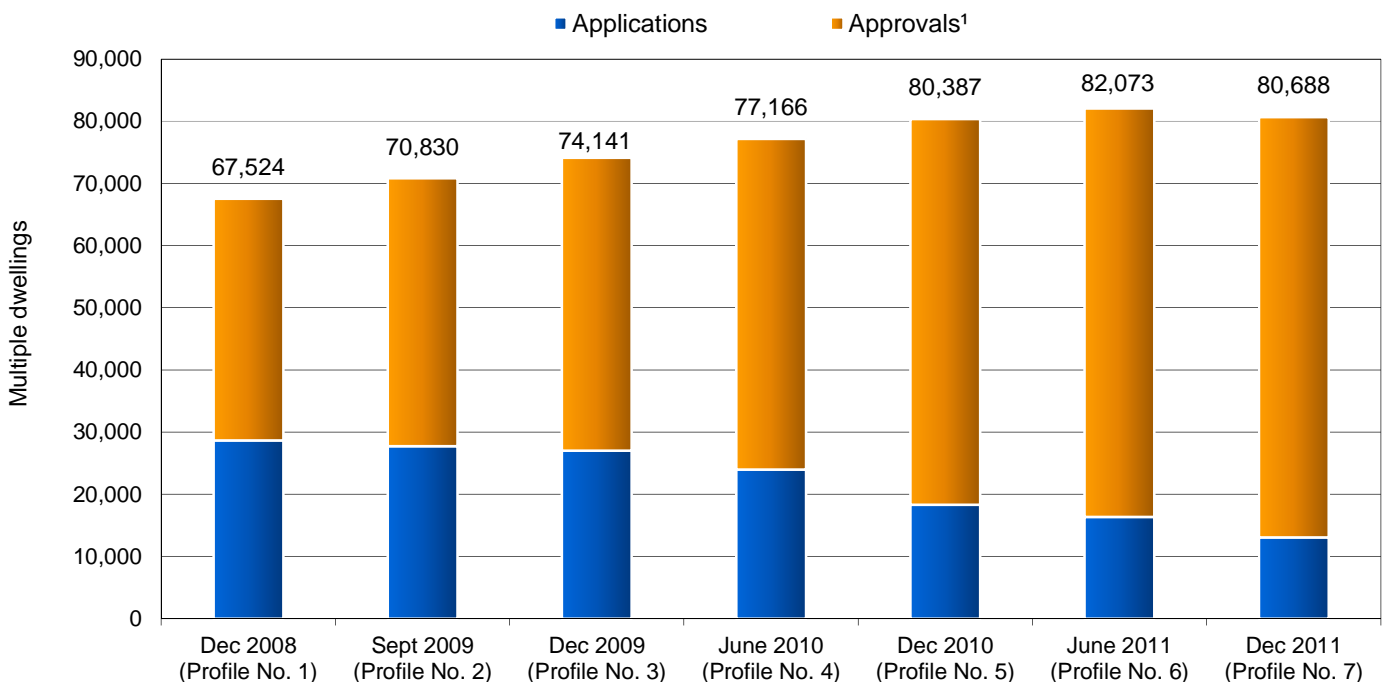


Sources: Figure 2 – Department of Natural Resources and Mines (DNRM) Digital Cadastral Database (DCDB) at December 2006; OESR Infill MCU database. Figure 3 – DNRM DCDB at June 2011; OESR lot registration database (based on DNRM registration of title data). Figure 4 – DNRM aerial imagery flown 2011; OESR Infill MCU database.

## Infill multiple dwelling projects in SEQ at December 2011

- The total number of infill multiple dwellings in the planning pipeline decreased slightly in the latest reporting period (Figure 5).
- At 31 December 2011, there were 3,223 multiple dwelling infill projects in SEQ, with the potential to contribute an additional 80,688 dwellings. This was a decrease of 11.2% in the number of identified projects, and an increase of only 0.4% in the number of dwellings over the 12 months from December 2010.
- The number of infill multiple dwellings in projects awaiting decision (at the application stage) has declined over each of the seven reporting periods to date. Over the 12 months to December 2011, the number of infill multiple dwellings within applications fell 28.9% from 18,336 to 13,039.
- 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 9.1% over the year to December 2011, from 56,584 to 61,754 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 except the current period, it should be noted that not all approved projects will proceed through to construction and completion.
- Brisbane and Gold Coast cities accounted for 72.1% of the SEQ total with 40,283 and 17,929 potential new dwellings respectively at December 2011 (Figure 6).
- Moreton Bay Regional Council recorded the third highest number in SEQ with 6,438 infill multiple dwellings in the planning pipeline, followed by Logan City (4,683) and Sunshine Coast Regional Council (4,337).
- The largest increase in infill multiple dwellings over the year to December 2011 was recorded in Brisbane City, with an additional 1,275 dwellings to reach 40,283 (growth of 3.3%).
- Gold Coast City was the only other council area in SEQ that did not record a decline in infill multiple dwellings in the pipeline.
- The largest declines in infill multiple dwellings were recorded in Redland (253 dwellings or -8.6%) and Toowoomba (226 dwellings or -18.0%) over the year to December 2011.

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

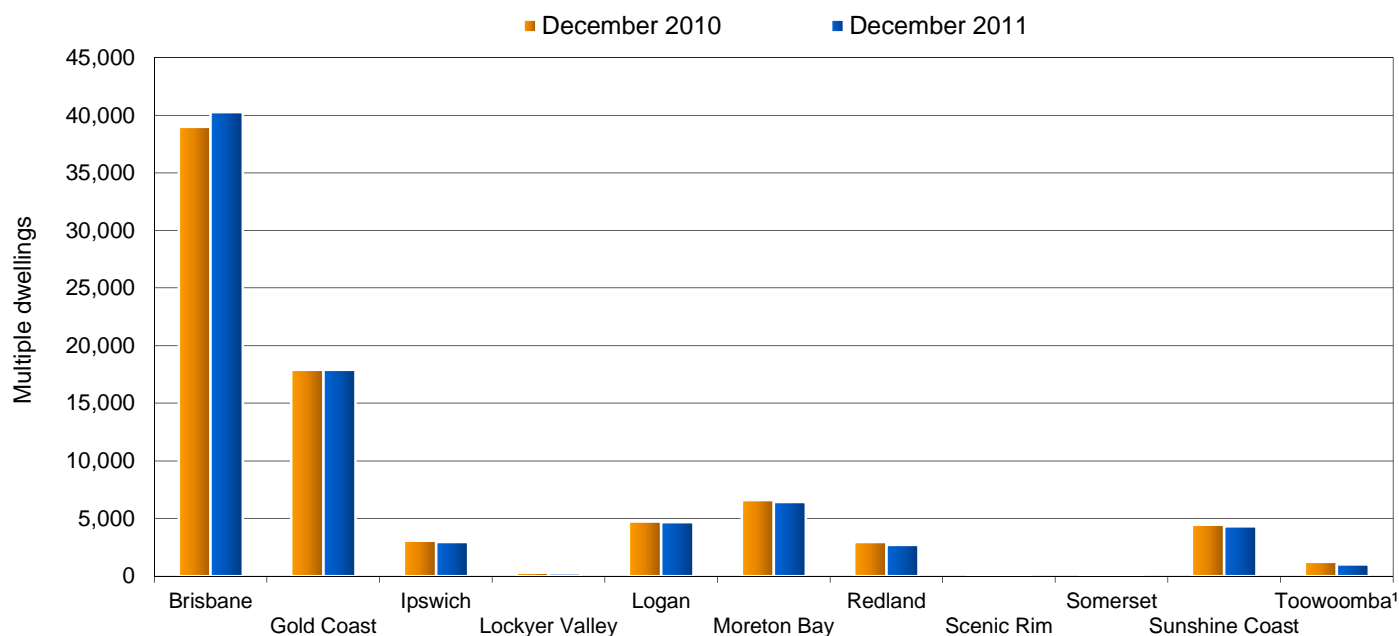


<sup>1</sup> Approvals include preliminary approvals, development permits and approval types not able to be identified (typically older approvals).

Source: OESR, based on data extracts as at December 2011 from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Housing and Public Works.



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



<sup>1</sup> 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 as at December 2011 from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Housing and Public Works.

### Infill multiple dwelling project size

- Table 2 presents the number of SEQ infill projects and dwellings by project size at December 2010 and December 2011.
- Of the 3,223 identified multiple dwelling projects in SEQ at December 2011, 66.0% included 10 or fewer dwellings, 21.7% between 11 and 49 dwellings and 12.3% 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 December 2011, from 11.8% to 10.3%.
- Of the 2,127 SEQ projects with 10 or fewer dwellings at December 2011, 864 (40.6%) included just one or two new dwellings, such as self-contained relative's accommodation and dual occupancies.
- The number of infill multiple dwellings in small and medium project categories declined in the year to December 2011. Only the 'large project' category (of 50 or more dwellings) recorded an increase, from 53,723 to 55,853 dwellings.
- There were 181 infill multiple dwelling projects in SEQ at December 2011 with 100 or more dwellings each. Around 76% of these projects were in Brisbane and Gold Coast cities, with the potential to yield 31,488 new dwellings collectively.

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

Size of project (dwellings)	at December 2010				at December 2011			
	No. of projects	% of projects	No. of dwellings	% of dwellings	No. of projects	% of projects	No. of dwellings	% of dwellings
Small (10 or fewer)	2,499	68.8	9,487	11.8	2,127	66.0	8,302	10.3
Medium (11–49)	753	20.8	17,177	21.4	700	21.7	16,533	20.5
Large (50 or more)	378	10.4	53,723	66.8	396	12.3	55,853	69.2
<b>Total</b>	<b>3,630</b>	<b>100.0</b>	<b>80,387</b>	<b>100.0</b>	<b>3,223</b>	<b>100.0</b>	<b>80,688</b>	<b>100.0</b>

Source: OESR, based on data extracts as at December 2011 from local government development assessment databases, the ULDA, Southbank Corporation and the Department of Housing and Public Works.





## 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 31 December 2011 were included in the analysis.

Infill multiple dwellings under the jurisdiction of the ULDA, Southbank Corporation and the Department of Communities as at December 2011 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 3 will not match that presented in Table 1.

- At December 2011, 97.4% of Brisbane's infill multiple dwelling projects were located on sites that had a previous urban use. The remaining 2.6% of sites were either non-urban in nature (turf farm or former quarry) or had not ever been previously developed (Table 3).
- Around three-quarters (75.6%) of infill multiple dwelling project sites in Brisbane City had an existing residential use at the time of application, at 936 of the 1,238 sites assessed.
- Most of these residential redevelopment sites (774 or 82.7%) comprised detached houses only. There were 87 'mixed use' sites which included a residential component and 75 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 777 smaller infill projects assessed, 674 or 86.7% 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 171 sites with larger proposed infill projects of 50 or more dwellings, just 60 or 35.1% of the sites had a residential use at the time of application.
- Based on documentation lodged with MCU applications, around three-quarters (76.0%) of infill projects on residential redevelopment sites will involve dwelling loss through demolition or removal.
- The total loss was estimated at 1,089 dwellings, or around 3.0% of the total dwelling yield of 36,210.

*Table 3 Infill multiple dwelling projects and dwelling yields in live MCUs by current use at time of application, Brisbane City<sup>1</sup>, at December 2011*

<i>Current use at time of application</i>	<i>Projects</i>	<i>Dwelling yield</i>
Commercial	40	2,307
Community	36	2,637
Industrial	27	1,606
Mixed use, no residential	30	4,531
Non-urban	3	476
Retail	19	1,290
Previously undeveloped	29	2,801
Vacant <sup>2</sup>	118	6,013
<b>Total 'non-residential' current use</b>	<b>302</b>	<b>21,661</b>
Detached house/s	774	9,140
Other residential (units, apartments)	75	1,604
Mixed use, including residential	87	3,805
<b>Total 'residential' current use</b>	<b>936</b>	<b>14,549</b>
<b>Total</b>	<b>1,238</b>	<b>36,210</b>

<sup>1</sup> 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.

<sup>2</sup> 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 (ABS) released residential building approvals data at the Census Collection District (CD) level up to 30 June 2011. From 1 July 2011, the ABS introduced a new statistical geography, the Australian Statistical Geography Standard (ASGS), with small area building approvals data available for Statistical Areas Level 1 (SA1). Estimates of total infill residential building approvals for 2010 and 2011 were created by aggregating the relevant CD data (to June quarter 2011) and SA1 data (for September and December quarters 2011) to approximate the existing urban area boundary. Local government area (LGA) totals derived from these aggregations may not match published LGA totals and are provided in Table 4 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 69.7% during 2011 (Table 4). This represented a small increase from the 67.4% share recorded during 2010.
- SEQ infill dwelling approvals declined by 13.6% from 14,865 in 2010 to 12,831 in 2011. Separate houses accounted for 42.5% of the SEQ total with 5,455 approvals in 2011, while 'other dwellings' (such as attached dwellings) contributed the remaining 57.5% with 7,376 approvals.
- Over half (56.1%) of the separate house dwelling approvals in SEQ during 2011 were located within the existing urban area. This proportion is expected to decline as remnant broadacre land within the existing urban area is consumed.
- 'Other dwelling' infill building approvals for SEQ decreased by 5.6% from 7,816 in 2010 to 7,376 in 2011. Most (84.8%) of the total 'other dwelling' building approvals in SEQ occurred within the existing urban area during 2011.

### By local government area

- Somerset (27.3%) and Logan (3.1%) were the only SEQ local governments to record growth in infill dwelling approvals over the period 2010 to 2011.
- Infill dwelling approvals in Lockyer Valley decreased by 52.7% from 55 in 2010 to 26 in 2011, the largest percentage decline of all SEQ local governments. Gold Coast and Brisbane infill dwelling approvals declined by 13.6% and 3.5% respectively over the same period.
- Brisbane (93.4%) and Redland (69.3%) cities recorded the largest proportions of total dwelling approvals as infill during 2011.
- Most SEQ local governments recorded declines in separate house and 'other dwelling' approvals over the period 2010 to 2011 (Figures 7 and 8).

Table 4 Infill and total residential building approvals<sup>1</sup> by type of dwelling, by SEQ local government areas, 2011

Local government area (LGA)	Houses			Other dwellings			Total dwellings		
	Inside EUA	Total for LGA	% inside EUA	Inside EUA	Total for LGA	% inside EUA	Inside EUA	Total for LGA	% inside EUA
Brisbane	1,657	1,915	86.5	4,516	4,694	96.2	6,713	6,609	93.4
Gold Coast	524	1,188	44.1	860	1,116	77.1	1,384	2,304	60.1
Ipswich	473	939	50.4	240	305	78.7	713	1,244	57.3
Lockyer Valley	25	208	12.0	1	4	25.0	26	212	12.3
Logan <sup>2</sup>	671	1,336	50.2	742	824	90.0	1,413	2,160	65.4
Moreton Bay	744	1,521	48.9	594	923	64.4	1,338	2,444	54.7
Redland	403	581	69.4	70	102	68.6	473	683	69.3
Scenic Rim	26	156	16.7	1	4	25.0	27	160	16.9
Somerset	26	195	13.3	2	2	100.0	28	197	14.2
Sunshine Coast	730	1,217	60.0	262	614	42.7	992	1,831	54.2
Toowoomba <sup>3</sup>	176	464	37.9	88	105	83.8	264	569	46.4
<b>SEQ total</b>	<b>5,455</b>	<b>9,720</b>	<b>56.1</b>	<b>7,376</b>	<b>8,693</b>	<b>84.8</b>	<b>12,831</b>	<b>18,413</b>	<b>69.7</b>

<sup>1</sup> Totals for local governments may not match published figures as they are aggregated from Census Collection District (CD) and SA1 level data.

<sup>2</sup> 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).

<sup>3</sup> 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.



Figure 7 Separate house infill building approvals by SEQ local government areas, 2010 and 2011

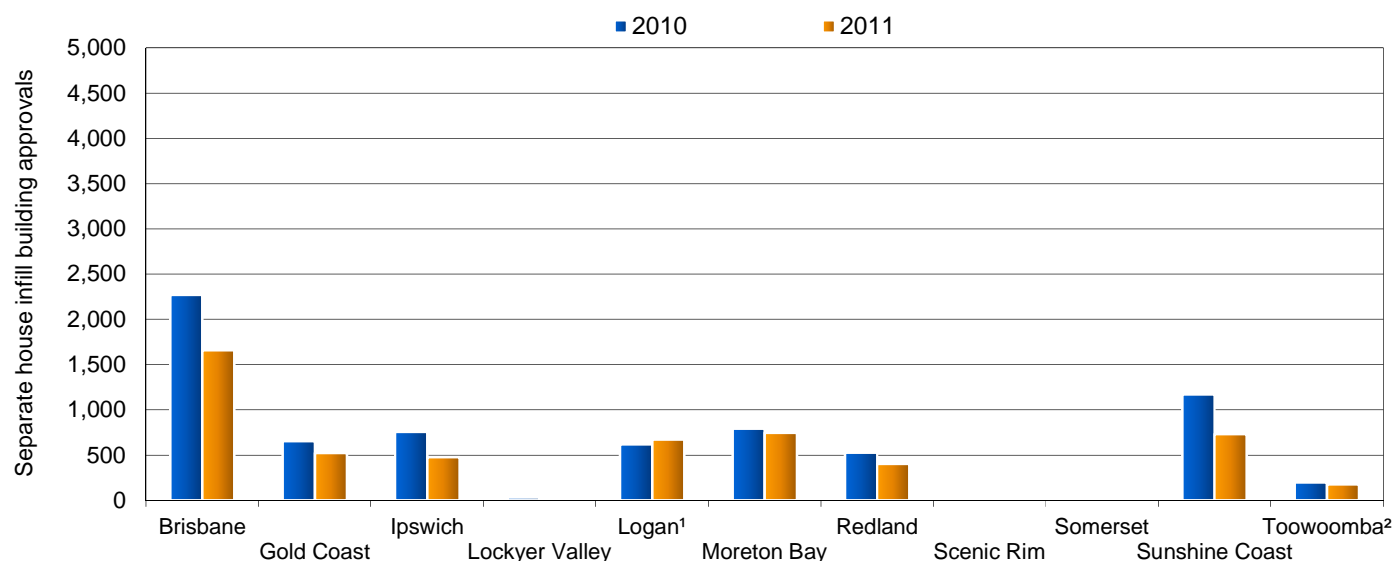
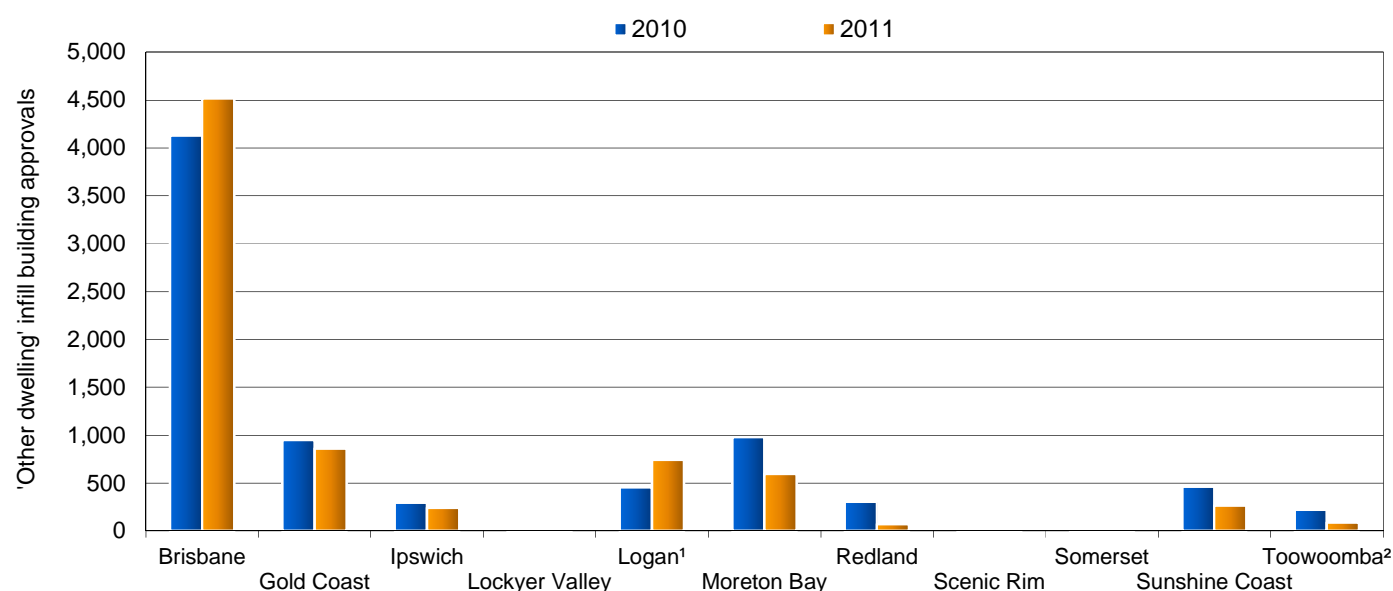


Figure 8 'Other dwelling' infill building approvals by SEQ local government areas, 2010 and 2011



<sup>1</sup> 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).

<sup>2</sup> 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 (Figures 7 and 8): OESR, based on Australian Bureau of Statistics unpublished building approvals data.

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