Broadhectare study 2013 profile

Sunshine Coast Regional Council

Introduction

The preliminary estimated resident population of Sunshine Coast Regional Council (hereafter referred to as the Sunshine Coast) at 30 June 2012 was 322,600 persons (Source: ABS 3218.0). This is expected to increase to between 383,000 (low series) and 409,700 (high series) persons by 2021, representing population growth over the 2011–2021 period of between 60,400 (low series) and 87,100 (high series) (Source: Queensland Government Population Projections, 2013 edition).

Land stock

The total area of broadhectare land available on the Sunshine Coast for residential development is 3,200 hectares, representing only a very small percentage of the total land area (Tables 1 and 2).

This includes a site at Caloundra South Priority Development area which was declared in 2010 by Economic Development Queensland. In addition to the broadhectare land shown, residential development is planned for a recently declared Priority Development Area at Maroochydore.

Broadhectare land is defined as the amount of unconstrained residential land under the current planning scheme including existing residential developments approved by council. For this study, land parcels are excluded that yield less than three dwellings.

Broadhectare land can be further classified as follows:

- urban residential broadhectare land — 2,644 hectares
- rural residential broadhectare land — 556 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 Sunshine Coast land use profile

Land use category	Area	% of total
Suitable for urban residential broadhectare development	2,644 ha	0.84%
Suitable for rural residential broadhectare development	556 ha	0.18%
Assumed existing urban residential use	7,420 ha	2.37%
Assumed existing rural residential use	27,146 ha	8.66%
Roads, watercourses and railway casements	27,006 ha	8.61%
Rural/Green/Open space	246,869 ha	78.72%
Balance area [(a)]	959 ha	0.31%

(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 Sunshine Coast broadhectare stock and dwelling yield [a]

	Broadhectare stock (hectares)				Theoretical	Expected dwelling yield (dwellings) [c]			
Timeframe	Higher density	Standard urban density	Rural density	Total stock	dwelling yield (dwellings) [b]	Higher density	Standard urban density	Rural density	Total dwellings
0–<2 years	37	389	81	508	4,568	1,398	3,075	95	4,568
2–<5 years	122	271	34	428	7,278	4,264	2,773	57	7,094
5–<10 years	168	568	119	854	12,991	5,241	6,869	233	12,343
10+ years	380	373	47	799	15,738	9,286	5,792	124	15,202
Not specified	143	192	276	611	7,047	4,628	1,615	301	6,544
Total	**850**	**1,794**	**556**	**3,200**	**47,622**	**24,817**	**20,124**	**811**	**45,753**

(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 45,800 dwellings.
- Development at higher density accounts for over 54 per cent of the total expected dwelling yield.
- Development at standard urban density will account for 44 per cent of the total expected dwelling yield.

Stock composition

The broadhectare stock on the Sunshine Coast 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 (5,615 hectares) and the area available for development (3,200 hectares) indicates that some parcels are affected by physical or environmental constraints. The main points from Table 3 include:

- Residential stock is contained within 799 land parcels.
- Parcels less than or equal to 1.2 hectares account for over 55 per cent of all parcels.
- Of the urban broadhectare stock, over 72 per cent is contained in parcels sized 10 hectares or more.
- Parcels sized 10 hectares or more account for over 80 per cent of the expected total dwelling yield from broadhectare land.

Table 3 Sunshine Coast 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	442	236	188	2	190	2,235	18	2,253
1.3–2.0	119	197	131	7	138	1,685	9	1,694
2.1–4.9	130	429	270	28	298	3,421	79	3,500
5.0–9.9	44	300	143	54	197	1,484	68	1,552
10.0+	64	4,453	1,912	465	2,377	36,116	637	36,753
Total	**799**	**5,615**	**2,644**	**556**	**3,200**	**44,941**	**811**	**45,753**

(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 on the Sunshine Coast at the time of the 2011 Census was 2.7 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 82,900 and 119,500 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 Sunshine Coast population yields based on a range of household sizes (persons) [(a)]

Development type	Number of dwellings	Household size (average persons per household)				
		2.3	2.5	2.7	2.9	3.1
		Possible population yield				
Rural residential	811	1,865	2,028	2,190	2,352	2,514
Standard urban density residential	20,124	46,285	50,310	54,335	58,360	62,384
		Household size (average persons per household)				
		1.4	1.6	1.8	2.0	2.2
		Possible population yield				
Higher density residential	24,817	34,744	39,707	44,671	49,634	54,597
Total	**45,752**	**82,894**	**92,045**	**101,195**	**110,346**	**119,496**

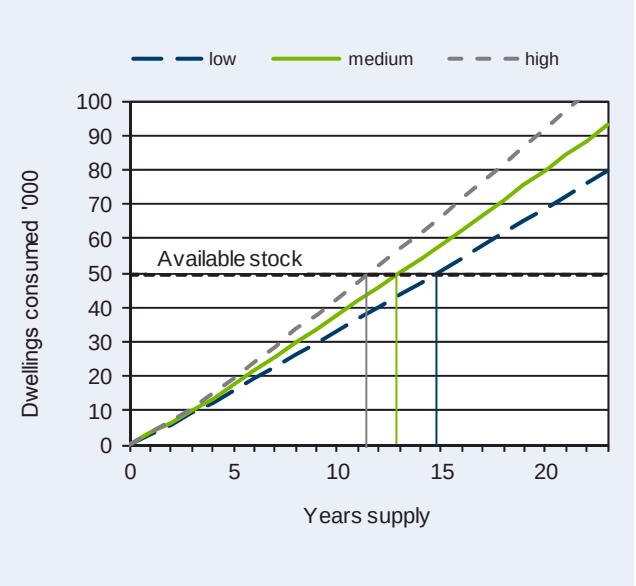
(a) Count of all persons enumerated in the dwelling on census night, including visitors from inside Australia.
Excludes usual residents who were temporarily absent on census night.

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 49,637 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.

Figure 1 Sunshine Coast projected demand for land stock based on dwelling projections



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.

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

Table 5 Sunshine Coast 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	79,625	45,753	3,884	49,637	15
Medium trend	93,039	45,753	3,884	49,637	13
High trend	107,725	45,753	3,884	49,637	11

(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 — Sunshine Coast Regional Council

The study has estimated that the total area of broadhectare land available for residential development is 3,200 hectares. If this land were fully developed it has the potential to yield approximately 45,800 dwellings and accommodate 101,200 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 13 years of supply.

Government Statistician

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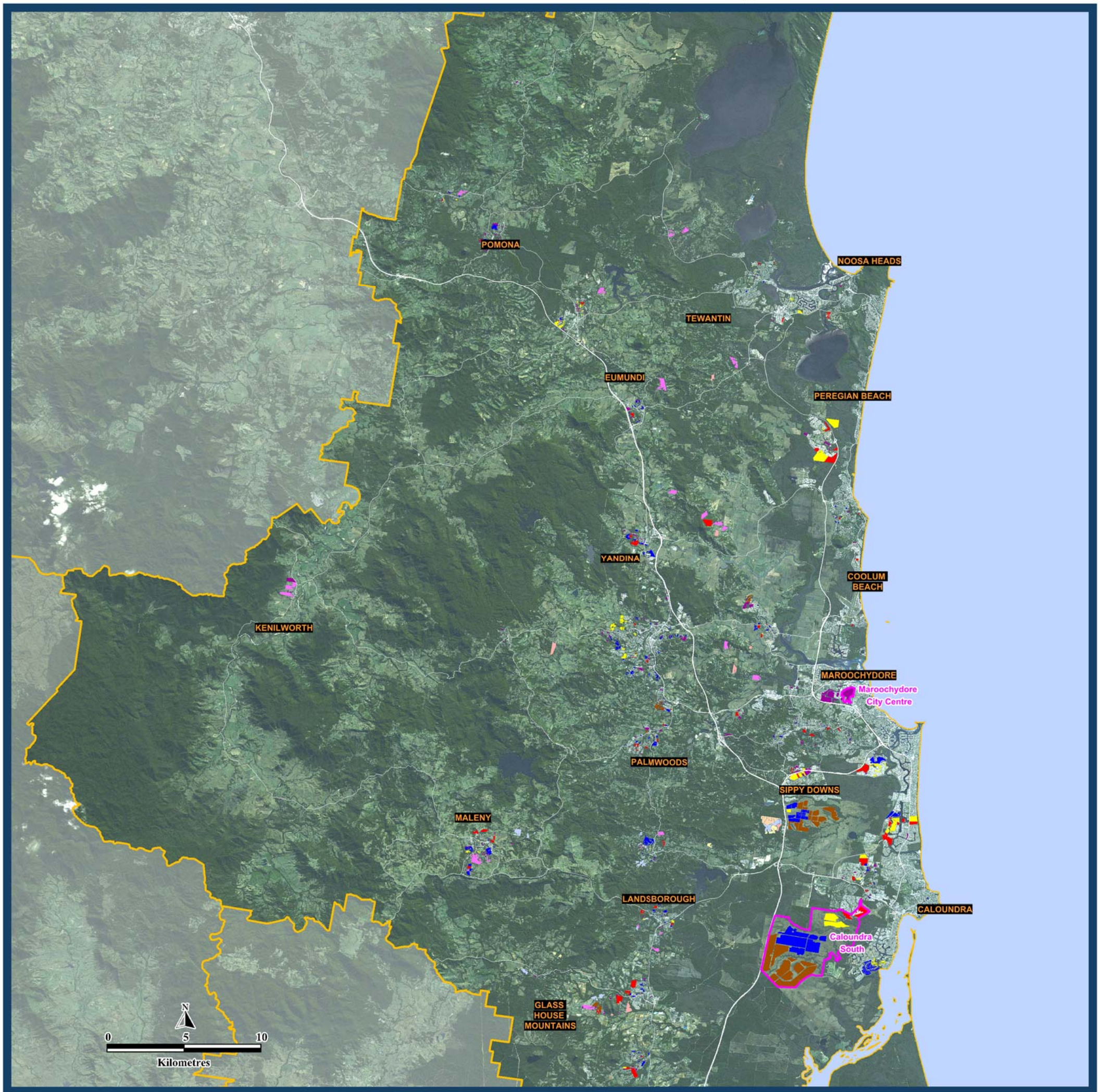


Legend

Broadhectare land

Timeframe	Urban residential	Rural residential
0 – 2 years	426 ha	81 ha
2 – 5 years	393 ha	34 ha
5 – 10 years	736 ha	119 ha
10+ years	753 ha	47 ha
Not specified	335 ha	276 ha

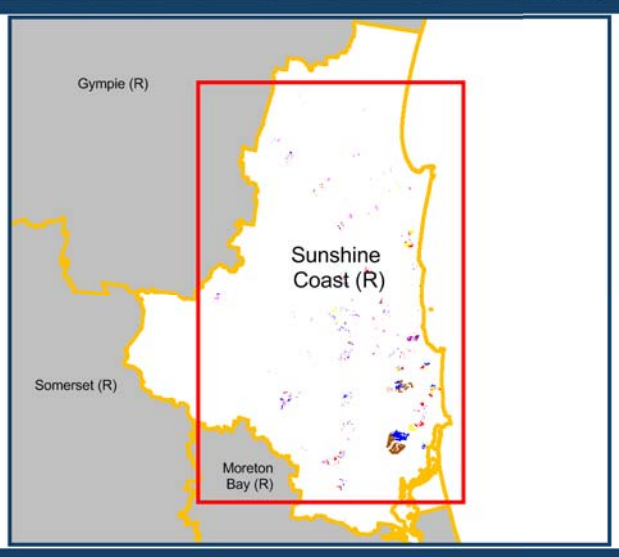
Land suitable and potentially available for residential development. Timeframes are indicative only.

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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This edition of the Broadhectare Study was based on the Digital Cadastral Database, September 2013.

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