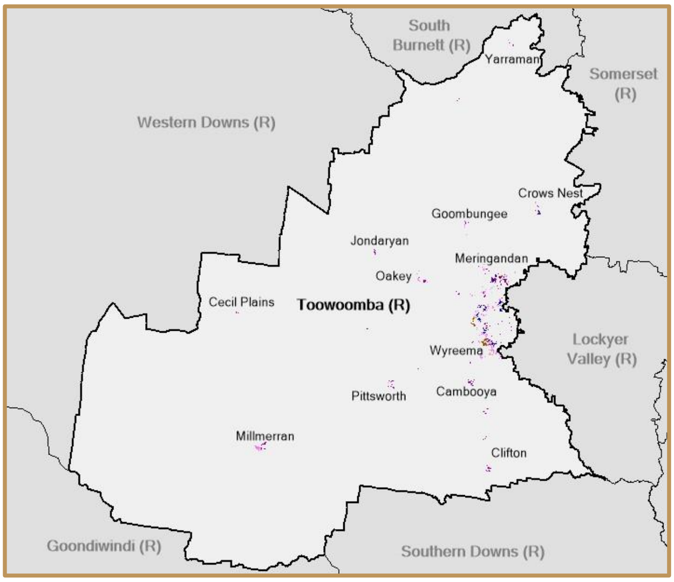
Broadhectare profile – Toowoomba Regional Council, 2023

Key findings:

- **broadhectare land supply of 3,658 hectares**
- **development yield of 18,500 dwellings**
- **additional housing capacity for 48,200 persons**
- **22 years of dwelling supply**



Broadhectare study methodology

This profile contains the results from a broadhectare study of land planned for residential development from parcels with a minimum size of 2,500 m². The broadhectare supply includes only the developable portion of the land parcels after constraints are applied. Constraints, for example flooding or protected vegetation, affect the amount of land available for development.

The study identifies the location of larger land parcels to house future population. It also provides an indication of the timing of development and dwelling yield, based where applicable on the approved number of lots within a development permit. For the remaining land parcels, planning scheme development densities or council advice are applied. The study does not attempt to accommodate the Queensland Government policy intent for housing supply as outlined in the South East Queensland Regional Plan 2017 (*ShapingSEQ*) or subsequent updates, and described in the *Land Supply and Development Monitoring Report* prepared by the Department of State Development, Infrastructure, Local Government and Planning.

Land supply

The total area of broadhectare land that is suitable and potentially available for residential development in Toowoomba Regional Council (Toowoomba) is 3,658 hectares (Table 1). For this study, the supply can be further classified by the net dwelling density of development as follows:

- Higher density broadhectare (over 60 dwellings/ha) — 1 hectare
- Standard urban broadhectare (between 3 and 60 dwellings/ha) — 2,313 hectares
- Rural residential broadhectare (up to 3 dwellings/ha) — 1,344 hectares.

Table 1 Toowoomba broadhectare supply

Development timeframe (years)	Broadhectare supply			
	Higher density	Standard urban density	Rural residential density	Total stock
	— hectares —			
0 – 2	1	135	115	**251**
2^+– 5	>1	129	59	**188**
5^+– 10	0	614	60	**673**
10^+	0	346	27	**373**
Not specified	0	1,089	1,084	**2,172**
Total[(a)]	**1**	**2,313**	**1,344**	**3,658**

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

Broadhectare dwelling yield

Two scenarios are presented in Table 2 as possible outcomes for the total dwelling supply from broadhectare. A high scenario that assumes all identified supply as suitable and available for residential development. Also, a more likely to occur medium scenario showing a lower supply due to the additional factors of land ownership and fragmentation that affect the availability of land.

Based on the medium scenario, the main points from Table 2 are:

- Broadhectare land could potentially accommodate approximately 18,500 dwellings.
- Higher density development accounts for less than 1 per cent of the total potential dwelling yield from broadhectare.
- Development at standard urban density accounts for 90 per cent of the total potential broadhectare dwelling yield.

Table 2 Toowoomba broadhectare dwelling yield by timeframe

Development timeframe (years)	High scenario				Medium scenario			
	Higher density	Standard urban density	Rural residential density	Total dwellings	Higher density	Standard urban density	Rural residential density	Total dwellings
	— dwellings —							
0 – 2	30	1,945	226	**2,202**	30	1,945	226	**2,202**
2⁺– 5	23	1,820	106	**1,949**	23	1,820	106	**1,949**
5⁺–10	0	7,237	165	**7,402**	0	4,735	121	**4,857**
10⁺	0	3,982	56	**4,038**	0	2,146	26	**2,171**
Not specified	0	12,948	2,393	**15,341**	0	5,951	1,414	**7,365**
Total[(a)]	**53**	**27,932**	**2,947**	**30,932**	**53**	**16,597**	**1,893**	**18,543**

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

Broadhectare land characteristics

Stock composition

For all broadhectare parcels, the difference between the overall parcel area (4,794 hectares) and the area available for development (3,658 hectares) indicates that some parcels are affected by physical or environmental constraints.

The main points from Table 3 are:

- Broadhectare stock is contained within 1,570 land parcels.
- Broadhectare parcels between 0.25 and <1.2 hectares make up 48 per cent of all parcels.
- Parcels larger than 10 hectares account for 52 per cent of the dwelling supply in the medium scenario.

Table 3 Toowoomba broadhectare supply by parcel size

Parcel size categories	Land parcels	Total area of parcels	Broadhectare area			Medium scenario		
			Urban residential	Rural residential	Total hectares	Urban residential[(a)]	Rural residential	Total
hectares	number	hectares	— hectares —			— dwellings —		
0.25 < 1.2	755	387	377	5	**382**	1,279	4	**1,282**
1.2 < 2.0	186	306	137	137	**274**	581	108	**689**
2.0 < 5.0	430	1,159	568	419	**986**	3,324	384	**3,708**
5.0 < 10.0	112	843	390	216	**606**	3,042	207	**3,249**
10.0+	87	2,099	842	568	**1,410**	8,424	1,192	**9,616**
Total[(b)]	**1,570**	**4,794**	**2,314**	**1,344**	**3,658**	**16,650**	**1,893**	**18,543**

(a) Includes dwellings at higher and standard urban densities
(b) Components may not sum exactly to totals due to rounding

Approved land development

For this study, approved land development is identified by the presence of a current development permit issued by a council or planning authority over a broadhectare parcel, either for reconfiguring of a lot or a material change of use.

Approximately 439 hectares of approved land development potentially yielding up to 4,150 dwellings

Leading suburbs for broadhectare land

The leading suburbs for supply of broadhectare land and dwellings are shown in Table 4.

Table 4 Toowoomba leading suburbs for broadhectare and dwelling supply

Broadhectare		Dwellings[(a)]	
Suburb	**hectares**	**Suburb**	**dwellings**
Highfields	379	Highfields	3,507
Drayton	312	Glenvale	2,679
Glenvale	249	Drayton	2,650
Millmerran	215	Crows Nest	1,993
Torrington	181	Cotswold Hills	1,797

(a) Dwelling count based on high scenario due to dwelling information for medium scenario not being available at suburb level

Small-scale developments

For this study, development approvals for reconfiguring a lot that yield less than 10 dwellings are considered small-scale. If a large proportion of development approvals are of a smaller scale, then this could indicate a limited number of larger broadhectare parcels available for development.

For Toowoomba as at May 2023:

- There were 68 small–scale development approvals yielding a total of 124 dwellings.
- Small-scale approvals represent 61 per cent of total development approvals and 3 per cent of all approved lots.

Emerging land supply

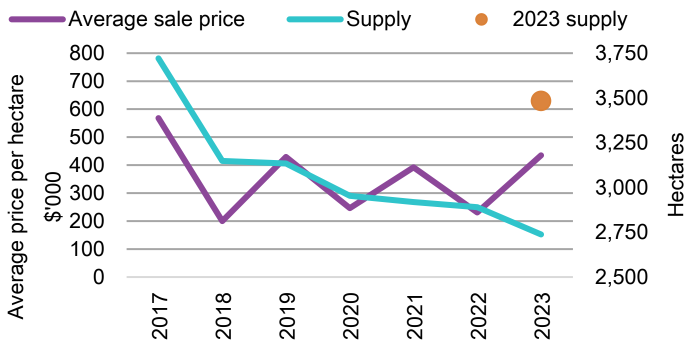
A key issue when discussing land supply is the sale price of developed lots. Variations in supply may lead to changes in average sale price. A leading indicator to monitor this link is changes in the sale price of broadhectare land parcels in the expansion area. For this study, the definition of 'expansion area' is based on that of ShapingSEQ. Land supply outside the existing urban area, as defined by the regional plan, is known as *expansion* and within, *consolidation*.

In Figure 1, expansion area broadhectare supply over the period 2017 to 2023, is compared between the previous broadhectare study and the current edition. The decline in supply over the period to 2023 was due to land development consuming broadhectare land parcels. The increase in supply shown for 2023, of approximately 700 hectares, is due to the use of updated information identifying additional land supply.

Based on sales of broadhectare parcels:

- **the average price per hectare for broadhectare land was $435,000 for the year ending March 2023**
- **an overall decrease of $133,000 in the annual average price per hectare of broadhectare land in the period 2017 to 2023**

Figure 1 Toowoomba expansion area broadhectare



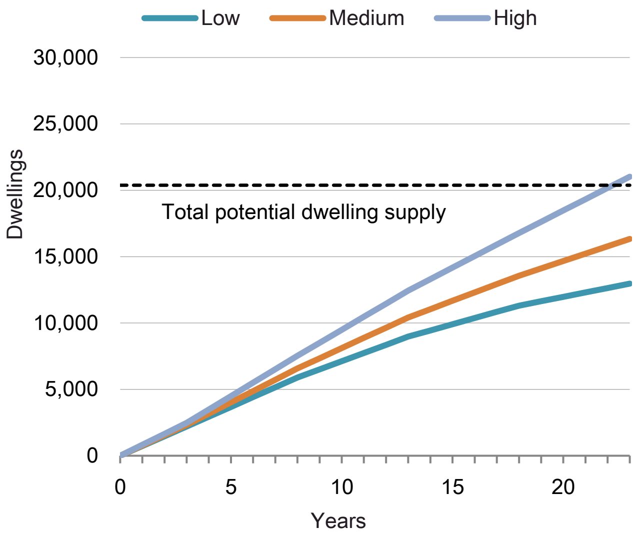
Broadhectare dwelling characteristics

Total potential dwelling supply

Ownership and fragmentation of land parcels are potential constraints to residential land supply that are not easily measured. Owners' intentions can impact the availability of land for development and consequently reduce apparent land supply. Fragmentation of land has a similar impact, particularly due to its effect on factors of development such as economic viability of a project and infrastructure provision. To reflect their impact on land supply and the associated dwelling supply, adjustments have been made to the broadhectare stock. For this study, propensity of development rates have been applied to those land parcels not subject to approvals.

To determine overall dwelling supply for this study, the number of approved multiple dwellings (generally attached dwellings) that are awaiting commencement or completion have been added to the broadhectare dwelling supply. Also included are lots below 2,500 m^2 that have been developed and are vacant. Dwelling supply based on these components indicates a total potential of approximately 20,400 dwellings (Table 5).

Figure 2 Toowoomba dwelling scenarios



Dwelling demand

Not all future dwelling demand will be accommodated through development of broadhectare land. Nevertheless, an indicator of the status of dwelling supply (from broadhectare, vacant lots and approved multiple dwellings), using a medium dwelling supply scenario, can be determined by using dwelling projections as an indicator of future demand. To assess the supply, the Queensland Government's *Projected dwellings, by series, by LGA, 2021 to 2046* has been used (Figure 2).

Table 5 Toowoomba dwelling scenarios

Potential residential dwelling supply			
Broadhectare dwelling supply[b]	Existing vacant land parcels[c]	Approved multiple dwellings[d][e]	Total potential dwellings
18,543	791	1,045	**20,379**

Projected dwelling demand to 2046[a]		Supply (years)
Low series	12,967	n.a*
Medium series	16,334	n.a*
High series	21,023	22

n.a* supply beyond projection range

(a) *Queensland Government Dwelling projections, by series by LGA, 2021 to 2046*
(b) Medium scenario potential dwelling supply as per table 2
(c) Estimate of vacant residential lots at August 2023
(d) Number of approved multiple dwellings awaiting commencement or completion as at March Quarter 2023
(e) Overlaps with broadhectare have been removed

Broadhectare population characteristics

An indication of the population capacity achievable from the broadhectare land can be estimated using household size and dwelling yields. A comparison with the projected population increase can flag potential gaps between demand and land supply. However, further development in existing residential areas via infill development could also accommodate additional population.

Queensland Government 2023 edition dwelling projections have been used as an indicator of the number dwellings required in Toowoomba. These projections are available in 3 series (low, medium, high) to year 2046.

- **Toowoomba is projected to require between 13,000 and 21,000 dwellings to 2046***
- **Dwelling supply from broadhectare land is expected to last approximately 22 years under the high dwelling projection scenario. The dwelling supply is not expected to be exhausted during the current projection period for the low and medium scenarios.**

*** *Source: Queensland Government household and dwelling projections, 2023 edition.***

Estimated resident population

The estimated resident population of Toowoomba is:

- 178,400 persons as at 30 June 2022 (Source: ABS (2020–21), *Regional population*)
- Projected to rise to between 198,411 (low series) and 225,042 (high series) persons by 2046 (Source: *Queensland Government population projections: Regions*, *2021 to 2046*). This represents an increase of between 20,010 persons (low series) and 46,640 persons (high series) by 2046.

Average household size

- The average household size for private dwellings in Toowoomba at the time of the 2021 census was 2.6 and 1.7 persons for houses and attached dwellings respectively. Table 6 shows a range of population yield outcomes based on a range of household sizes for broadhectare land in each density category.

Table 6 Toowoomba broadhectare population yields based on a range of household sizes (persons)

Development type	Dwellings (Medium scenario)	Household size				
		— average persons per household —				
		2.2	**2.4**	**2.6**	**2.8**	**3.0**
	Houses	**Possible population yield (persons)**				
Rural residential	1,893	4,165	4,544	4,922	5,301	5,680
Standard urban density residential	16,597	36,514	39,833	43,153	46,472	49,792
		— average persons per household —				
		1.3	**1.5**	**1.7**	**1.9**	**2.1**
Attached dwellings		**Possible population yield (persons)**				
Higher density residential	53	69	79	90	101	111
Total	**18,543**	**40,748**	**44,457**	48,165	**51,874**	**55,583**

- **Dwellings constructed on broadhectare land have the potential to accommodate between 40,700 and 55,600 persons.**

Conclusion

The total area of broadhectare land currently available in Toowoomba for residential development is 3,658 hectares. Under a medium supply scenario, this land has the potential to yield approximately 18,500 dwellings and accommodate 48,200 persons. Based on current medium series for dwelling projections and dwelling supply as defined in this study, the available residential land stock is expected to last beyond the current projection period.

Abbreviations

ABS	Australian Bureau of Statistics
LGA	local government area
QVAS	Queensland Valuations and Sales System

Explanatory notes

Approved multiple dwellings

Multiple dwelling developments, subject to material change of use (MCU) approvals, include those where there is more than one self-contained dwelling approved for a parcel, or where there is one dwelling per lot and they are subject to a Community Title Scheme. A dwelling must include a kitchen and a bathroom to be assessed as self-contained. Examples include relative's accommodation, dual occupancies / duplexes, flats, units, townhouses, villas, apartments and includes short-term accommodation.

Relocatable homes, tourist accommodation, and dwellings approved in retirement villages/facilities are included where they are self-contained. Group accommodation where facilities are shared and purpose–built student accommodation are not included.

Broadhectare average price in expansion area

The supply was determined by filtering broadhectare parcels to include only parcels in the expansion area that were zoned for detached dwellings. Average price per hectare was calculated by using the value from QVAS sales data of broadhectare parcels divided by their title area. In addition to changes in supply and demand, variations in the average price from year to year are influenced by diversity in the attributes of the parcels sold, including:

- potential dwelling density
- the portion of the parcel that is developable
- proximity of parcels to infrastructure.

Broadhectare supply

Broadhectare refers to land planned for residential development from parcels with a minimum size of 2,500 m². Broadhectare supply includes only the developable portion of the land parcels after constraints that limit the amount of land available for development are applied.

Digital Cadastral Database (Queensland)

A spatial dataset containing the property boundaries and related property description of all land parcels in Queensland.

Existing Urban Area

A statistical boundary used to in the South East Queensland Regional Plan 2017 (*ShapingSEQ*) to measure consolidation and expansion development.

Expansion area

Areas identified in the South East Queensland Regional Plan 2017 (*ShapingSEQ*) for development outside the existing urban area boundary. Previously known as 'greenfield development'.

Higher density

Development on broadhectare yielding greater than 60 dwellings per hectare.

Household size

Calculation is based on count of all persons present in the dwelling on census night, including visitors from within Australia. Excludes usual residents who were temporarily absent on census night (2021).

Land fragmentation

An issue affecting development of land due to the location and shape of land.

Land Supply and Development Monitoring Report

The (now) Department of State Development, Infrastructure, Local Government and Planning's *Land Supply and Development Monitoring* (LSDM) *Report* applies a different approach to determining residential land supply.

Local government area (LGA)

A geographical area under the responsibility of a local government council or an Indigenous council. There are 78 LGAs in Queensland.

Propensity of development rate

A rate applied to a grouping of broadhectare parcels to indicate the availability for development.

Reconfiguring a lot

The potential scale of residential land development can be measured by the number of lots approved as part of a development permit. This type of permit is known as 'reconfiguring a lot' and is often referred to as land subdivision approval.

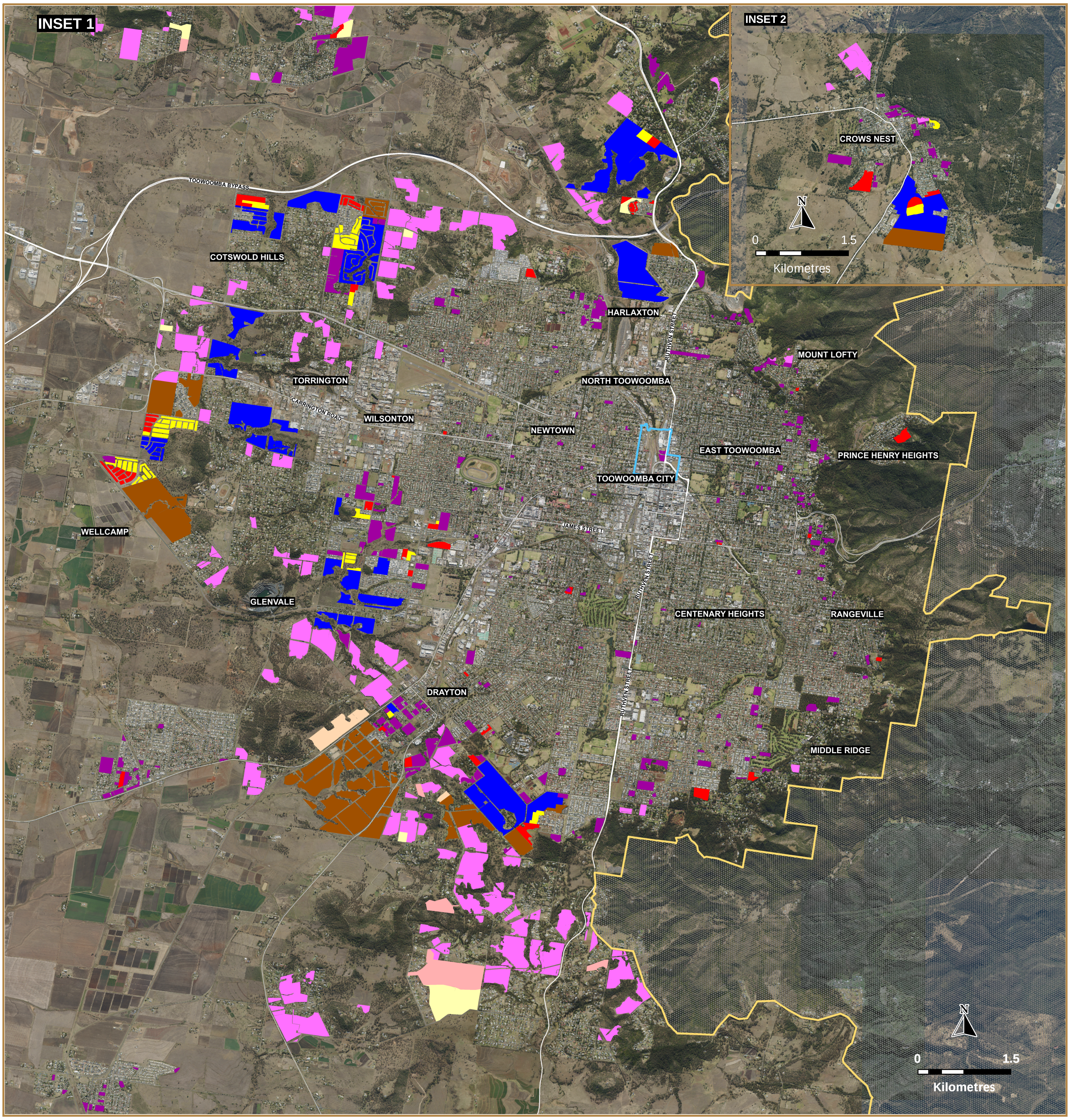
Rural residential density

Development on broadhectare parcels that will yield less than 3 dwellings per hectare.

Standard urban density

Development on broadhectare yielding from 3 to 60 dwellings per hectare.

Broadhectare Study 2023 - Toowoomba Regional Council - Map 1



LEGEND

Broadhectare land

Timeframe	Urban residential	Rural residential
0 – 2 years	136 ha	115 ha
2 – 5 years	129 ha	59 ha
5 – 10 years	614 ha	60 ha
10+ Years	346 ha	27 ha
Not specified	1,090 ha	1,084 ha

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

Other map features

- Local government boundaries
- Major roads
- Priority Development Area

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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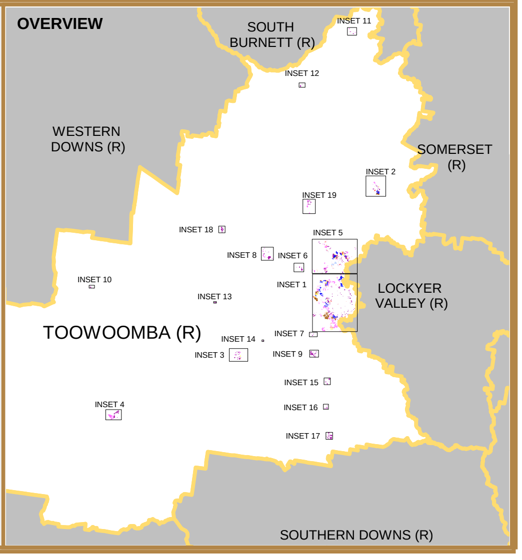
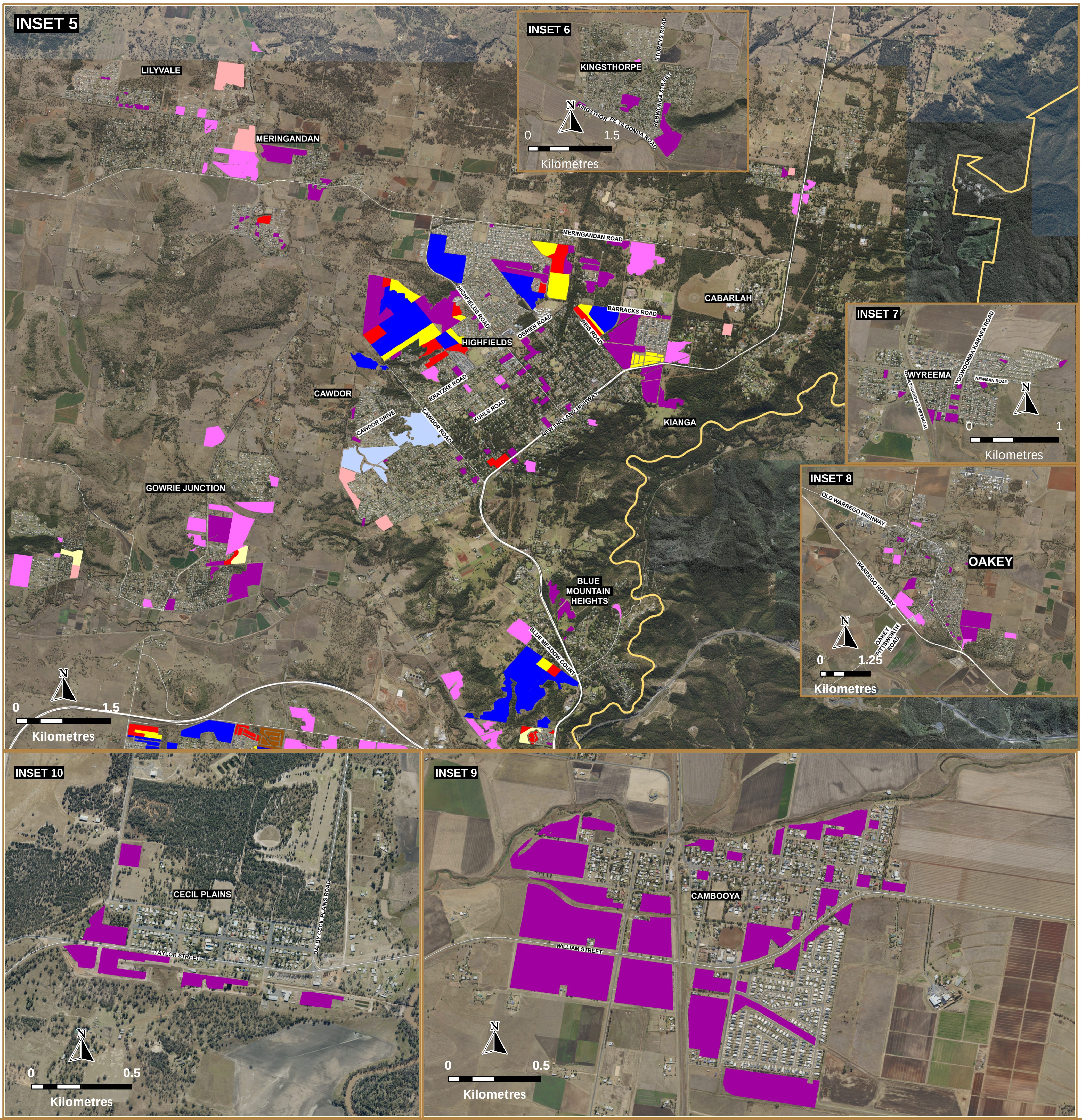


Broadhectare Study 2023 - Toowoomba Regional Council - Map 2



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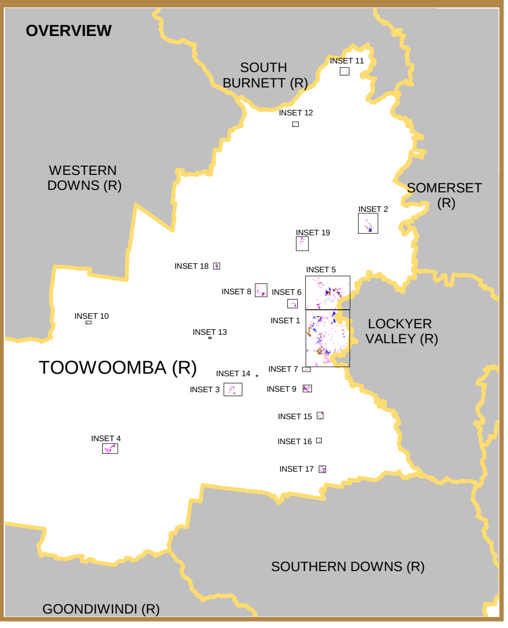
OVERVIEW



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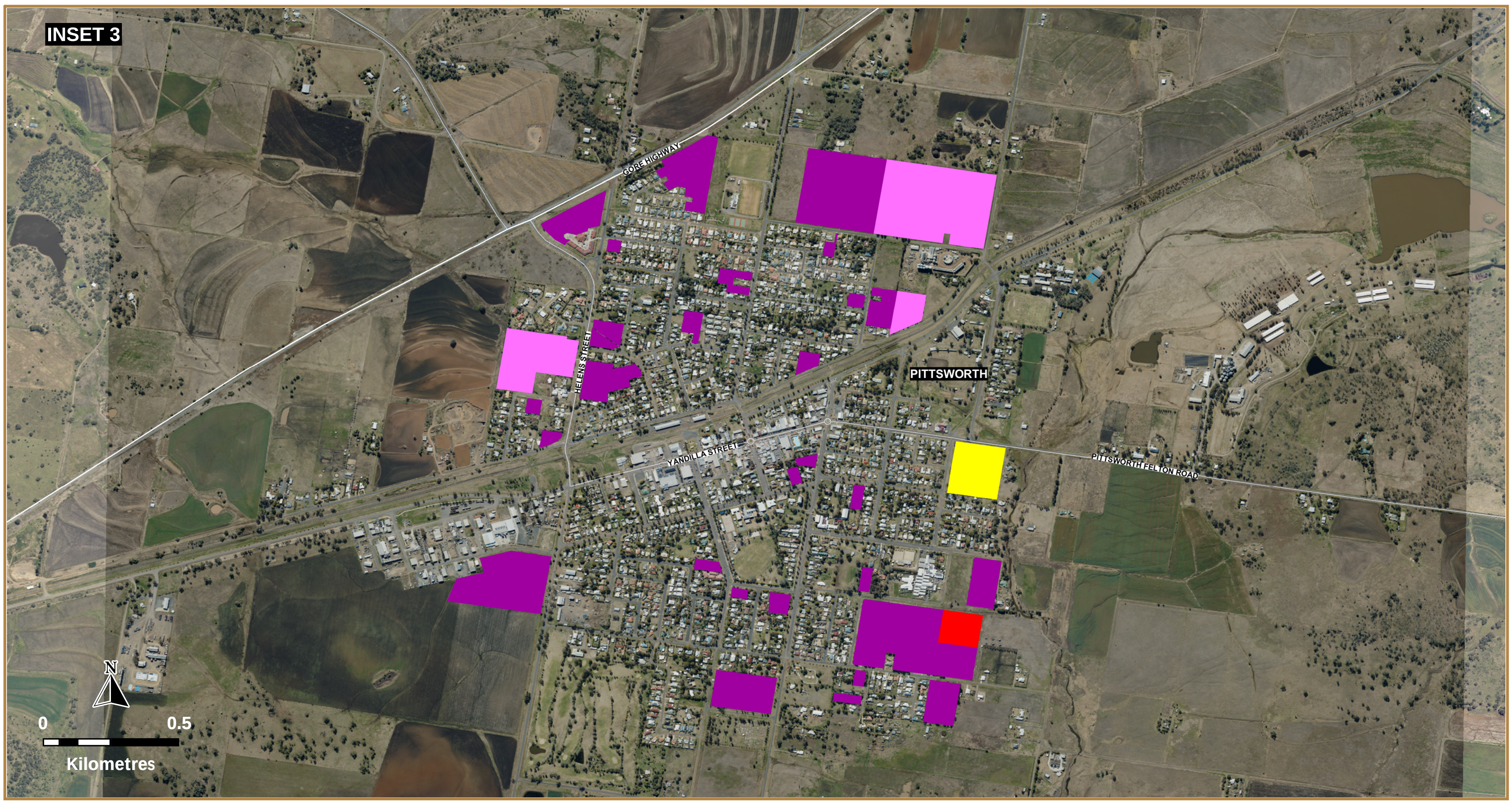
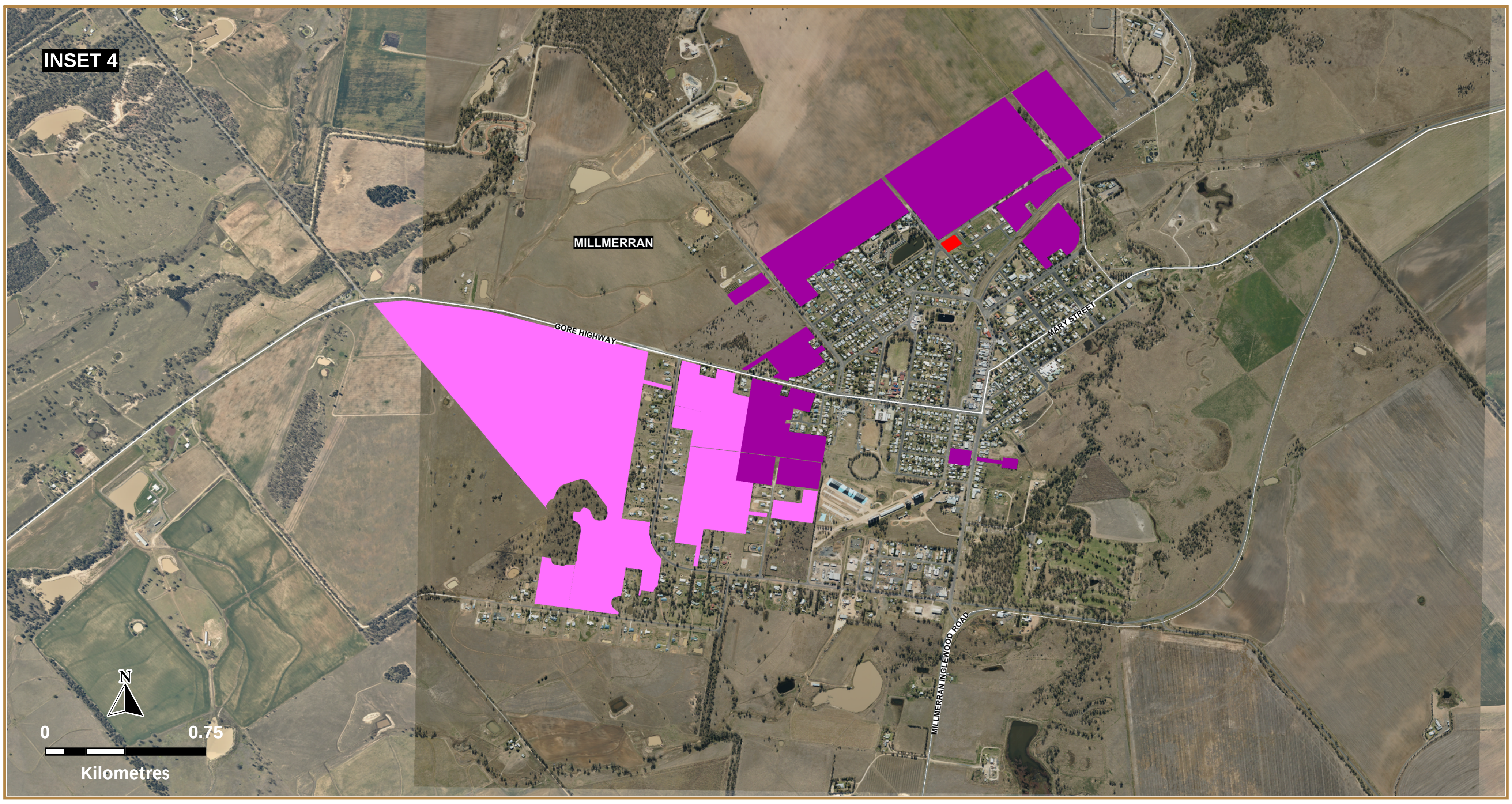
Broadhectare Study 2023 - Toowoomba Regional Council - Map 3





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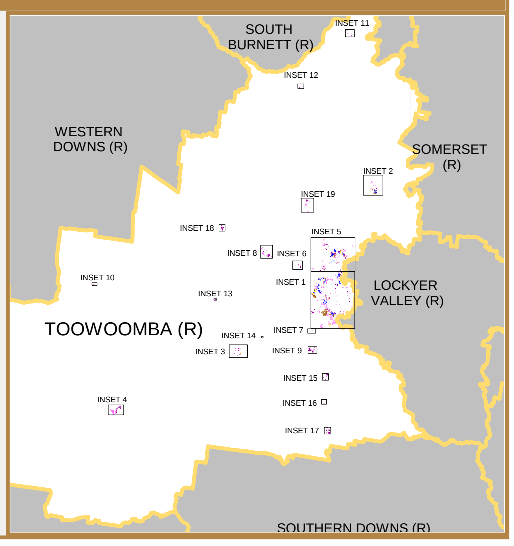

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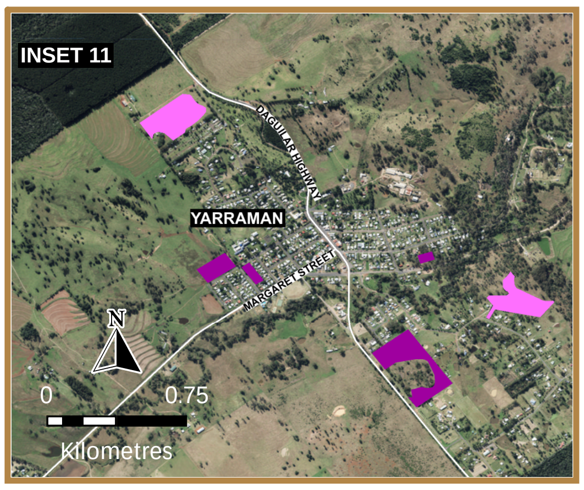
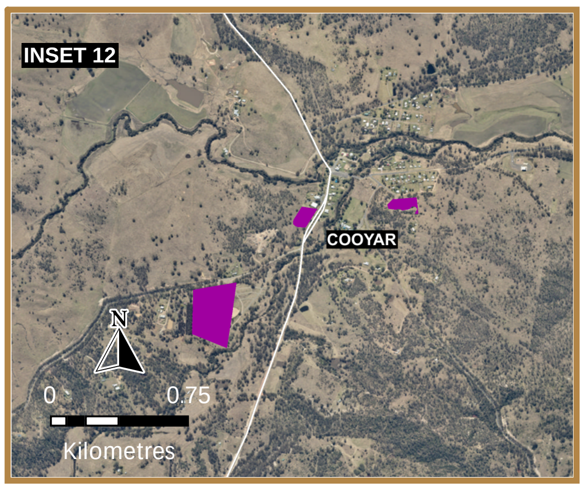
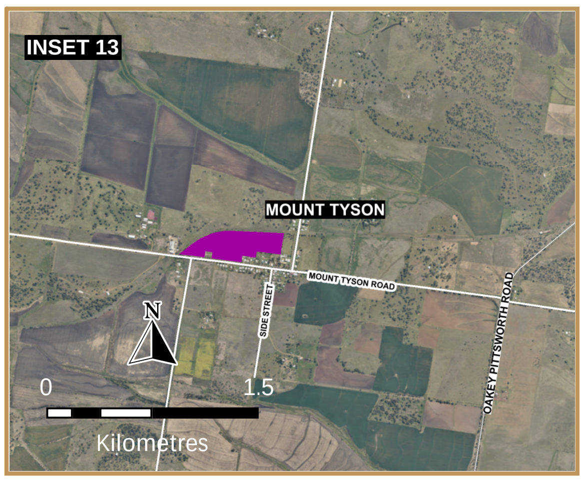
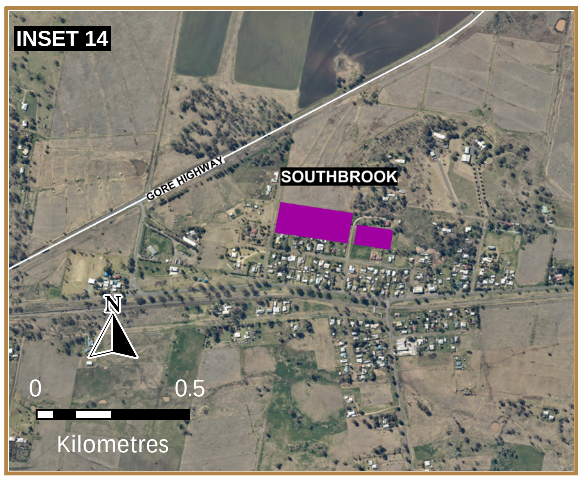
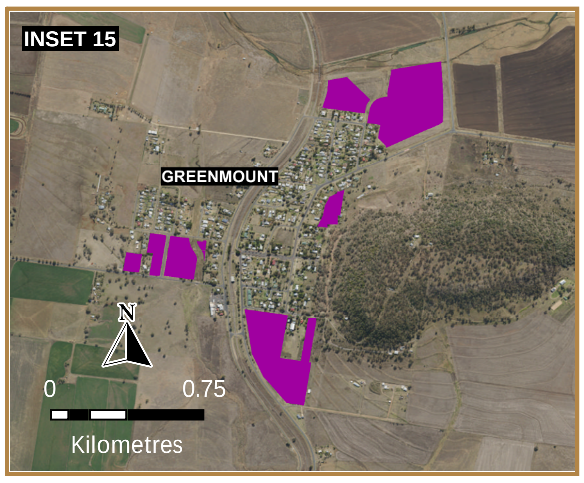
Broadhectare Study 2023 - Toowoomba Regional Council - Map 4

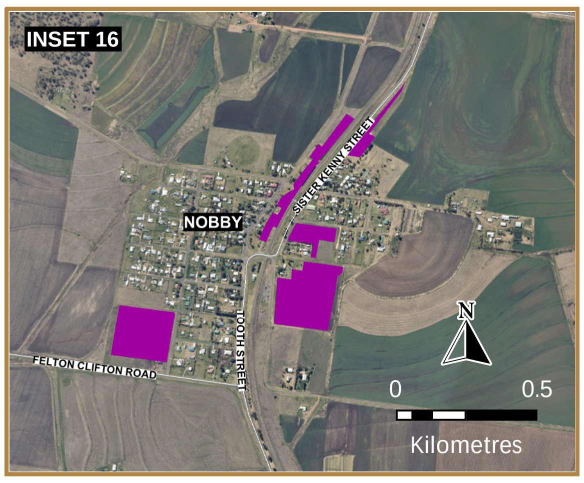


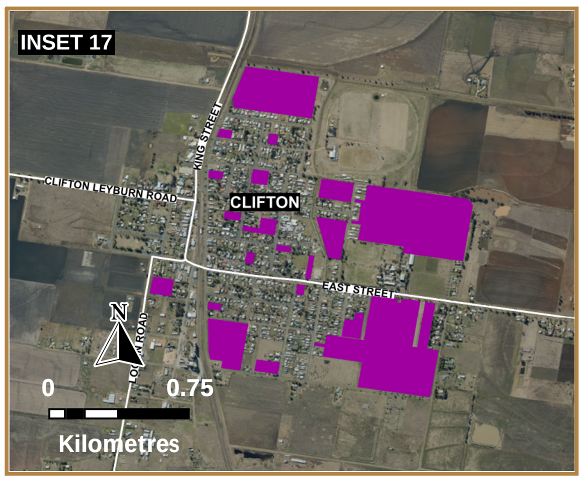


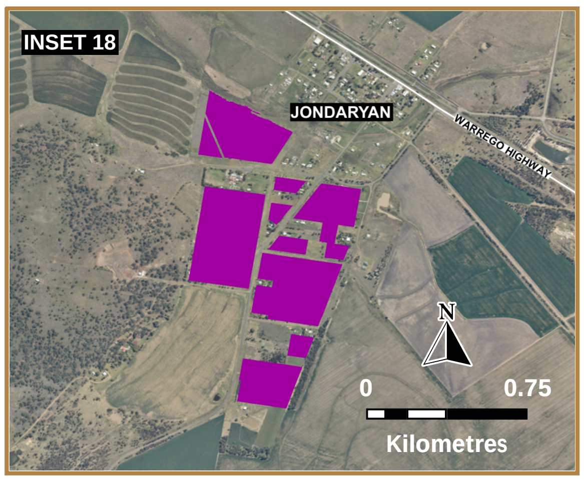


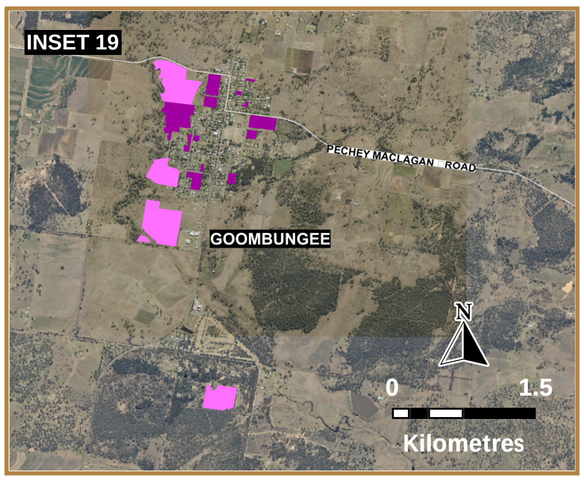












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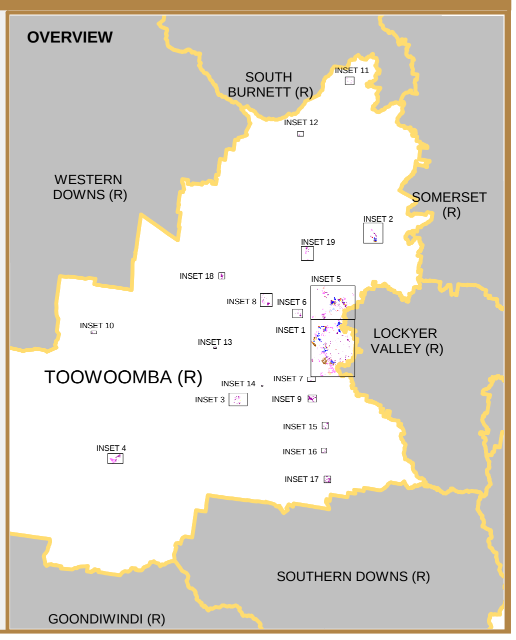

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