

Urban Development Program



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09

Regional
Residential
Report

City of Wodonga

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Minister's message

I am pleased to launch the inaugural regional editions of the highly reputed Urban Development Program.

Established by the Victorian Government, the Urban Development Program is an initiative of the planning framework *Melbourne 2030*. The program aims to ensure there is sufficient residential and industrial land both in metropolitan Melbourne and regional Victoria to meet population growth, ensure a competitive land market and reduce pressure on housing affordability.

In June 2010, the Victorian Government released *Ready for Tomorrow*, a Blueprint for Regional and Rural Victoria, which seeks to ensure that regional Victoria can continue to grow, remain prosperous and deliver investment and better liveability outcomes.

The Blueprint's long-term Regional Settlement Framework is for 'A State of Many Choices', which includes a settlement plan for regional Victoria that complements the *Melbourne @ 5 Million* policy, bringing together a comprehensive plan for the whole of the State.

This new approach helps to ensure that regional Victoria maintains its character, identity and sustainable way of life; that services and infrastructure keep pace with growth and economic development; and that growth is focused in places that have the capacity to accommodate and sustain higher populations. The Urban Development Program has been identified as a key component in assisting to deliver the outcomes of this approach across regional Victoria

One of the primary objectives of the Urban Development Program is to provide accurate and up-to-date information to assist the Victorian Government, local councils, infrastructure and service providers, and other major stakeholders in making informed decisions to help ensure an ongoing provision of land supply and supporting infrastructure for housing and employment requirements.

The Government is also speeding up the release of land in regional centres through place based projects. We are working with Councils to support planning for large scale growth in major regional areas such as the Ballarat West Growth Area and the Armstrong Creek Growth Area within Greater Geelong.

Additionally, the Regional Towns Development Program was introduced two years ago to help expedite the delivery of land for housing and employment across a number of these major areas. To date it has delivered Township Plans for Huntly and Strathfieldsaye within Bendigo, a Residential Infill Opportunities study for Ballarat, the Traralgon Inner South Masterplan in Latrobe City, and the Leneva Valley Design Guidelines in Wodonga.

With Victoria's regional population growing at its highest rate since 1982, it is important to carefully plan for this growth by providing liveable and sustainable communities with housing and employment.

The expansion of the Urban Development Program across regional Victoria will help ensure that regional cities can continue to grow and prosper for future generations.



JUSTIN MADDEN MLC
MINISTER FOR PLANNING





Executive summary

The 2009 Urban Development Program for Regional Victoria provides an analysis of supply and demand for residential and industrial land across parts of regional Victoria. Initially, this covers the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, but will cover other areas of regional Victoria in oncoming years. This component provides information on residential supply and demand for the municipality of Wodonga.

The following residential land supply assessment was undertaken by Spatial Economics Pty Ltd and commissioned by the Department of Planning and Community Development in conjunction with Regional Development Victoria and the Wodonga City Council.

It draws on important information and feedback obtained through a number of comprehensive consultations with key council officers, and Department of Planning and Community Development regional officers, undertaken through the course of the project.

Recent Activity

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Wodonga has averaged 234 dwellings per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent.

The vast majority of building approvals (93%) over the last three years from 2005/06 have been for separate houses and 7% for semi-detached dwellings.

From 2006 to 2009 there was an average annual residential lot construction of 227. The majority (72%) were broadhectare lots, 23% were minor infill and 4% low density. There was no major infill lot construction activity. Specifically:

- ▶ Broadhectare lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 164 lots per annum;
- ▶ Minor infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 53 lots per annum; and
- ▶ Low density lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 10 lots per annum.

In 2005/06 the median sales value for a vacant residential allotment was \$118,000 this increased to \$130,000 in 2007/08 and remained and declined slightly to \$128,000 in 2008/09. From 2005/06 to 2008/09, the median sales value for a vacant residential allotment increased by 0.4% per annum.

As measured from 2005/06 to 2008/09, the median sales value for a separate house increased by 0.5% per annum, increasing from \$250,000 to \$255,000.

Projected Demand

From 2011 to 2016 it is projected that the average annual dwelling demand across the municipal area of Wodonga will be 253; from 2016 to 2021 – 250 per annum and 255 per annum from 2021 to 2026.

Victoria in Future 2008 based demand projections broadly align with recent residential lot construction and building approval activity.

For the land supply assessment for Wodonga, an alternative demand scenario has also been presented. This scenario is simply an alternative view developed by the Wodonga City Council regarding the amount of future household growth within the municipality. The alternative demand scenario is fundamentally based on the assertion that Wodonga has been characterised in recent years by a 'constrained' residential land supply market.

As land is now becoming available for residential development, lot construction rates are also increasing. This in turn indicates that underlying demand for land and housing in this area is now largely being realized.

Identified Residential Land Supply

In total (excluding existing vacant residential lots) there is a residential lot supply of approximately 29,300. This is comprised of:

- ▶ 6,205 zoned broadhectare lots (20% of supply);
- ▶ 930 minor infill lots (3% of supply);
- ▶ 284 major infill lots (1% of supply);
- ▶ 63 vacant low density residential lots (0.2% of supply); and
- ▶ 23,608 designated future residential lots (76% of supply).

As at July 2009 there was a total residential vacant lot stock of 486, 89% of which was zoned Residential 1 (R1Z). There were 53 lots zoned Mixed Use (MUZ).

Within the municipal area of Wodonga, there is an estimated lot potential within Future Residential areas of 23,608. Currently land designated for urban development zoned Urban Growth (UGZ) represents 7% of the Future Residential land stocks or 1,715 lots, all of which is located in Baranduda.

Years of Residential Land Supply

Under both demand scenarios/projections, there are sufficient land stocks to satisfy **over 15 years** for zoned residential land stocks.

This is based on a zoned lot potential of 7,419 lots, of which:

- ▶ 6,205 lots are broadhectare;
- ▶ 930 are minor infill; and
- ▶ 284 are major infill.

For future residential land supply stocks, there is sufficient land to satisfy over **15 years** of projected demand (under both demand scenarios/projections).

In addition the vacant residential lot stock of 486 lots also constitutes around **1.7 years** supply of vacant land (*Victoria in Future 2008* based).

Current Actions

Current actions in the City of Wodonga include:

- ▶ Amendment C69 to the City of Wodonga Planning Scheme (Riverview Estate) which proposes rezoning more than 220ha of land for residential purposes, with a potential lot yield of over 2,000 lots; or an additional 6 to 8 years supply of developable residential land;
- ▶ Recent preparation of a structure plan for the Leneva area which identifies a residential lot capacity of approximately 29,000 lots, or in excess of 25 years supply of developable residential land. The City of Wodonga is currently preparing Amendment C82 to the City of Wodonga Planning Scheme which proposes to rezone some of this land for residential purposes.

In total the City of Wodonga has in excess of 15 years supply of residential land; consistent with Clause 11.02-1 of the State Planning Policy Framework which aims to ensure that sufficient land is available to meet forecast demand; and accommodate projected population growth over at least a 15 year period.

1.0 Introduction

1.1 Purpose and Context

The Urban Development Program has been one of the Victorian Government's major initiatives to support the strategic intent of its key planning document for metropolitan Melbourne, *Melbourne 2030*. The Urban Development Program was set up in 2003 to assist in managing the growth and development of metropolitan Melbourne and the Geelong region, and help ensure the continued sustainable growth of these areas in order to maintain their high levels of liveability.

The primary purpose of the Urban Development Program is to improve the management of urban growth by ensuring that government, councils, public utilities and the development industry have access to up-to-date and accurate information on residential and industrial land availability, development trends, new growth fronts, and their implications for planning and infrastructure investment.

The main purpose of the UDP is to provide accurate, consistent and updated intelligence on residential and industrial land supply, demand and consumption. This in turn assists decision-makers in:

- ▶ maintaining an adequate supply of residential and industrial land for future housing and employment purposes
- ▶ providing information to underpin strategic planning in urban centres
- ▶ linking land use with infrastructure and service planning and provision
- ▶ taking early action to address potential land supply shortfalls and infrastructure constraints
- ▶ contributing to the containment of public sector costs by the planned, coordinated provision of infrastructure to service the staged release of land for urban development.

The information contained and reported within the Urban Development Program enables early action to be taken in areas where land shortfalls have been identified.

1.2 Regional Context

During 2009, the Urban Development Program was expanded across key provincial areas across regional Victoria. Initially, this covers the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, but will be expanded to other key areas in oncoming years.

An expanded Urban Development Program into regional Victoria will build local and regional data bases and, importantly, provide a platform for mapping and spatial analysis in each region. This will in turn allow councils and other key stakeholders in the planning and development sectors to make more informed decisions in the growth and investment of these key areas across regional Victoria.

The residential land supply assessments for the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development in conjunction with Regional Development Victoria and the City Councils of Ballarat, Greater Bendigo, Latrobe and Wodonga.

These areas form the initial expansion of the Urban Development Program across regional Victoria. Other areas will be incorporated into the Urban Development Program in oncoming years.

1.3 2009 Urban Development Program Reports

The 2009 Urban Development Program Reports for Ballarat, Greater Bendigo, Latrobe and Wodonga, as well as the 2009 Urban Development Program Annual Report for metropolitan Melbourne and the Geelong region, are available online at www.dpcd.vic.gov.au/urbandevelopmentprogram

Interactive online maps are also available. MapsOnline enables users to search for specific projects, generate reports and print or download maps and statistical reports. It allows users to search for specific land supply areas by region or municipality, estate name, Melway reference, street address or lot number.

To access the UDP MapsOnline visit www.land.vic.gov.au/udp

For more information about the Urban Development Program, email the Department of Planning and Community Development at urbandevelopment.program@dpcd.vic.gov.au



2.0 Approach & Methodology

The following provides a brief outline of the major methodologies and approach in the assessment of recent residential lot construction, residential land supply, projections of demand and determining adequacy of land stocks. In addition, key definitions of terms used within the following assessment are detailed.

Information is presented at both a Statistical Local Area (SLA) and suburb (VicMap locality boundaries) level. A table and associated map highlights the location of these boundaries, this is located within the data appendices.

Note that for the purposes of this report the regional component of the expanded Urban Development Program is referred to as the 'Regional Urban Development Program'.

Estimating future dwelling requirements

The Victorian Population and Household Projections 2006–2036, released by the Department of Planning and Community Development and outlined in *Victoria in Future 2008*, are used by the Regional Urban Development Program as the basis for determining projected demand for residential allotments. Demand information is assessed at both a municipal level and by the component Statistical Local Areas (SLAs).

For the land supply assessment for Wodonga, an alternative demand scenario has also been presented. This scenario is simply an alternative view developed by the Wodonga City Council regarding the amount of future household growth within the municipality. The alternative demand scenario is fundamentally based on the assertion that Wodonga has been characterised in recent years by a 'constrained' residential land supply market.

As land is now becoming available for residential development, lot construction rates are also increasing. This in turn indicates that underlying demand for land and housing in this area is now largely being realized.

The Urban Development Program will continue to report on changes to projected demand levels within these areas, and incorporate updated *Victoria in Future 2008* population and household projections as they become available.

Residential Land

In the following land supply assessments residential lot construction and land supply have been designated by differing supply types, namely:

- ▶ **Vacant Lots:** Existing residential vacant lots, sized less than 1,000sqm if zoned Residential 1 (R1Z) or no size limitation if zoned Mixed Use (MUZ) or Township (TZ). A vacant lot is defined as no existing habitable dwelling or 'significant' existing use, eg. playgrounds.
- ▶ **Minor Infill:** Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less from 1,000sqm to 1ha.
- ▶ **Major Infill:** Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha.
- ▶ **Broadhectare:** Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.
- ▶ **Future Residential:** Land identified by the relevant municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which is has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.
- ▶ **Low Density:** Land zoned Low Density Residential (LDRZ) or Rural Living (RLZ).

Residential Lot Construction

Residential lot construction has been determined via the processes established within the State Governments Housing Development Data project. It involves the extensive cleaning of the residential cadastre and the application of this cadastre to the land supply types identified above.

A constructed lot is defined by the year of construction and the finalisation of certificate of title.

Construction activity has been assessed on an annual basis as at July of each year from 2006 to 2009.

Vacant lots

As defined above. Vacant residential lots were identified via customised GIS software that has been developed by Spatial Economics, to visually recognise built structures as well as vacant allotments. The software has the ability to recognise via colour intensity and colour distribution associated with built structures and straight lines created by roof- lines. This combined with titling and zoning information allows the recognition of both built structures on a parcel by parcel basis, as well as the incidence of vacant lots.

Lot Yields

Lot yields have been established on a parcel by parcel basis for the following land supply types: minor infill, major infill, broadhectare and future residential.

In establishing the lot yield for each individual land parcel the following information was used: incidence and location of native vegetation, zoning, natural features such as creeks, old mineshafts, escarpments, floodways, localised current/recent market yields, existing studies such as structure plans, municipal strategic statements etc.

In addition to site specific issues, 'standard' land development take-outs are employed, including local and regional. The amount/proportion of such take-outs are dependent on the site of the land parcel i.e. a 1ha site will have less take-outs than say a 50ha site. This approach has been utilised by both the residential and industrial land supply assessments since 2004 in the metropolitan Urban Development Program.

Further intelligence and verification is sourced from local municipal planning officers.

A small number of broadhectare supply sites have been allocated a zero lot yield because they were assessed as being unlikely to be developed over the next 15 years due to issues such as significant ownership fragmentation on relatively small parcels of land.

Development Timing

Staging for lot construction or development timing has been established for four broad time periods, namely:

- ▶ 1 to 2 years (2010–2011)
- ▶ 3 to 5 years (2012–2014)
- ▶ 6 to 10 years (2015–2019)
- ▶ 11 years or more (2020 and beyond).

Land identified for development over the next 2 years is available for residential purposes, and the required permits to subdivide the land generally exist and are being implemented.

Land parcels identified for development in 3 to 5 years are normally zoned, or may have rezonings finalised or approaching finalisation. They may also have permits to subdivide the land. Some degree of confidence can be applied to the timing and staging of these developments.

Where land has been identified as 'Future Residential' there are no associated timings, as these cannot be confidently applied until such time the land is zoned to allow residential development to occur. Similarly, land which has been lies within an Urban Growth Zone, where a precinct structure plan has not been approved, falls into a similar category. At such time a precinct structure plan has been prepared and approved, potential timings of residential development associated to these areas can be applied with a higher degree of confidence.

It should also be noted that timing of lot construction is cyclical, and highly dependent on underlying demand, economic cycles and industry capacity. This can mean that stated development intentions will vary from on-the-ground construction activity over time and by location. However, it is highly accurate in terms of the general direction and amount of growth.

Development timings have only been established for both Major Infill land supply stocks and broadhectare land.

Anticipated development timings are primarily sourced from existing planning permits, historic and current market activity, knowledge of industry capacity, projected demand and most importantly intelligence from local council staff.

Low density

Low density residential allotments have been established via the assessment of the cadastre and zoning information. All allotments zoned either Rural Living (RLZ) and Low Density Residential (LDRZ) is included. Custom technology as described above was utilised to establish the stock of vacant low density allotments, this was subsequently verified via a manual process in conjunction with aerial imagery.

Assessing adequacy

A key purpose of the Regional Urban Development Program is to identify if sufficient residential land is available to meet projected dwelling requirements within the relevant municipal area. Sufficient stock of residential land is required to maintain an ongoing supply to the market and to contribute to:

- ▶ adequate competition in the land development market to avoid unnecessary upward pressure on land prices and housing affordability; and
- ▶ sufficient lead times for planning and service provision agencies to undertake appropriate strategic and infrastructure planning activities.

For the purpose of reporting on the adequacy of residential stocks, the Regional Urban Development Program assesses the existing stock of residential land (Minor Infill, Major Infill, broadhectare and Future Residential) relative to projected demand. Adequacy of land stocks is presented by the number of years of supply.

Years of supply is undertaken at both a municipal level (total) and by Statistical Local Area. Years of supply is expressed for both the total zoned stocks of identified residential land and future residential land stocks.



3.0 Recent Activity

This section of the report covers the trends and shifts in building activity across the municipality of Wodonga, and provides an insight into proposed future residential development activity.

The information in this section has been compiled resulting from a number of comprehensive consultations with key representatives from the Wodonga City Council. It is supported by datasets from the Australian Bureau of Statistics.

Section Three of the report details the recent activity in terms of residential lot construction, dwelling approvals and sales values achieved across the municipal area of Wodonga. Residential lot construction activity is detailed from July 2006 to July 2009 and is presented at a suburb and municipal level. Residential lot construction is further analysed by supply type/location, namely:

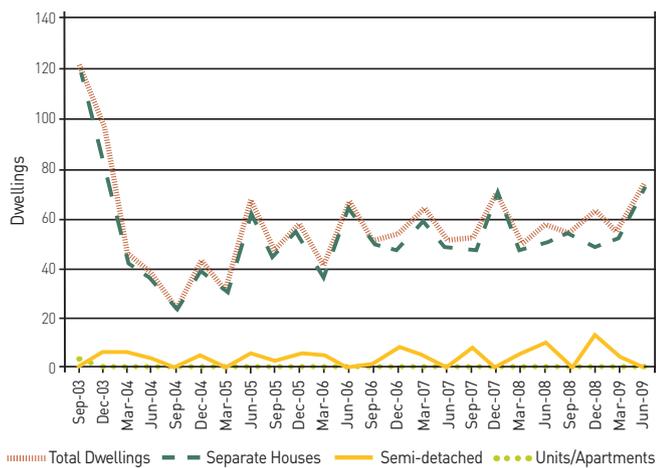
- ▶ Minor Infill;
- ▶ Major Infill;
- ▶ Broadhectare; and
- ▶ Low Density.

Analysis of the median sales value achieved by supply type/location for both vacant land and separate houses is presented.

3.1 Residential Building Approvals

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Wodonga has averaged 234 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. Graph 3.1 illustrates the amount of building approval activity by dwelling type on a quarterly basis for the municipal area of Wodonga.

Graph 3.1: Number of Residential Building Approvals, 2003/04 to 2008/09



Source: Australian Bureau of Statistics, Catalogue No. 8731.0

In 2003/04 there was a total of 302 residential dwelling approvals, declining to 164 in 2004/05 and remaining at the low to mid 200's from 2005/06 onwards.

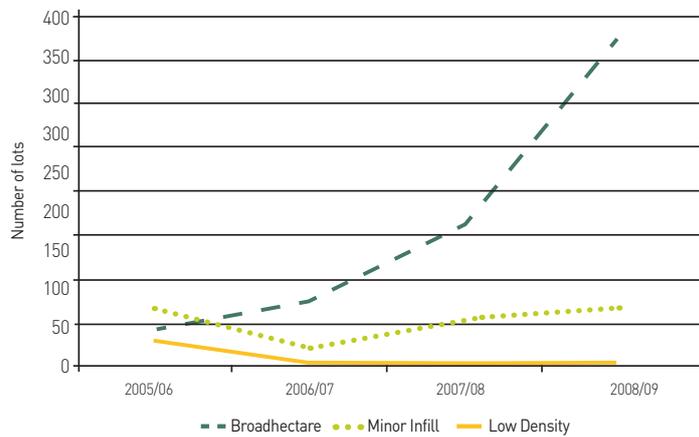
The vast majority of building approvals (93%) over the last three years from 2008/09 have been for separate houses and 7% for semi-detached dwellings.

3.2 Residential Lot Construction

Analysis has been undertaken to determine on a lot by lot basis the location and amount of residential lot construction activity from July 2006 to July 2009. Lot construction activity has been classified into distinct supply types and or supply locations as defined above.

Graph 3.2 summarises the amount of residential lot construction by supply type for the municipal area of Wodonga.

Graph 3.2: Number of Residential Lots Constructed by Supply Type, 2005/06 to 2008/09



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

From 2005/06 to 2008/09 there was an average annual residential lot construction of 227. The majority (72%) were broadhectare lots, 23% were minor infill and 4% low density. There was no major infill lot construction activity.

In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2007 at 102 lots and 'peaked' in 2009 at 449 lots.

Average lot construction and residential building approval activity as measured from 2005/06 to 2008/09 aligns in terms of the identified volumes.

3.2.1 Minor Infill Lot Construction

Minor infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 53 lots per annum. This represents 23% of all residential lot construction activity across the municipal area. Minor infill lot construction activity was relatively substantial within the suburbs of Wodonga (72%) and West Wodonga (24%).

As measured annually from 2005/06 to 2008/09, the amount of minor infill lot construction activity has varied significantly. In 2006 there were approximately 66 minor infill lots constructed, declining to 23 in 2007, increasing to 54 lots in 2008 and 69 lots in 2009.

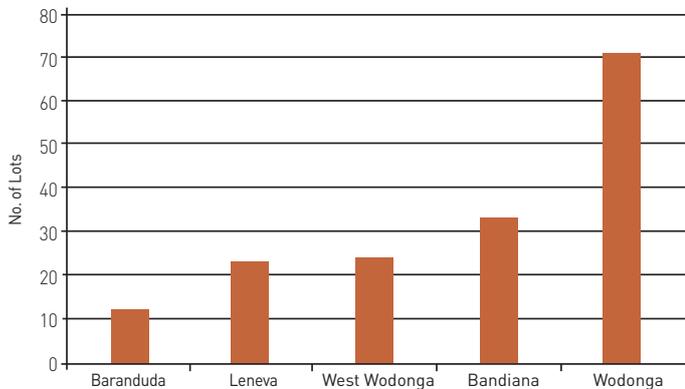
3.2.2 Major Infill Lot Construction

As measured from 2005/06 to 2008/09 there was no major infill lot construction activity within the municipality of Wodonga.

3.2.3 Broadhectare Lot Construction

Broadhectare lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 164 lots per annum. This represents 72% of all residential lot construction activity across the municipal area. Graph 3.3 summarises the average annual amount of broadhectare lots constructed from 2005/06 to 2008/09 by suburb.

Graph 3.3: Average Annual Number of Broadhectare Lots Constructed by Suburb, 2005/06 to 2008/09



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

There was relatively significant broadhectare lot construction activity within the suburbs of Wodonga (45%), and Bandiana (19%). As measured annually from 2005/06 to 2008/09, the amount of broadhectare lot construction activity has varied significantly. In 2006 there were approximately 42 broadhectare lots constructed, increasing to 75 in 2007, 164 lots in 2008 and 376 lots in 2009.

3.2.4 Low Density Lot Construction

Low density lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Wodonga averaged 10 lots per annum. This represents 4% of all residential lot construction activity across the municipal area. West Wodonga was the location of the majority of low density lot production.

3.3 Residential Land and House Prices

Analysis has been undertaken in conjunction with the Department of Planning and Community Development to match sales information for both vacant land and separate house sales by supply location. In addition, sales values have been determined for the entire municipal area. Sale values are a key 'outcome' indicator that can assist in determining the 'state of the land supply' market.

Table 3.1 summarise the median sales value of both vacant residential land and separate houses from 2005/06 to 2008/09.

In 2005/06 the median sales value for a vacant residential allotment was \$118,000 this increased to \$130,000 in 2007/08 and remained and declined slightly to \$128,000 in 2008/09. From 2005/06 to 2008/09, the median sales value for a vacant residential allotment increased by 0.4% per annum.

Table 3.1: Median Sales Price for Vacant Residential Allotments by Supply Type

	2005/06	2006/07	2007/08	2008/09
Vacant Allotments	\$118,000	\$120,000	\$130,000	\$120,000
Separate Houses	\$250,000	\$255,000	\$263,000	\$255,000

Source: Department of Planning and Community Development, 2009

Notes: Sale price data is only for vacant residential lots under 1,000sqm. Sales values are as at the nominal year.

As measured from 2005/06 to 2009/09, the median sales value for a separate house increased by 0.5% per annum, increasing from \$250,000 to \$255,000.

Summary & Conclusions

From 2005/06 to 2008/09 there was an average annual residential lot construction of 227. The majority (72%) were broadhectare lots, 23% were minor infill, and 4% low density.

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Wodonga has averaged 234 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent.

In 2005/06 the median sales value for a vacant residential allotment was \$118,000 this increased to \$120,000 in 2008/09, an average annual increase of 0.4%.

Analysis of the amount of building approvals, residential lot construction and price movements of vacant residential allotments indicates a functioning residential land market within Wodonga i.e. land sale price movements below the consumer price index and lot production broadly matching dwelling construction (building approvals).

4.0 Residential Land Supply

Section 4 of the report details the stock (measured in lots) of residential land across the municipality of Wodonga as at July 2009. Residential lot stock/supply is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential land supply is further analysed by supply type/location, namely:

- ▶ Vacant Lots
- ▶ Minor Infill;
- ▶ Major Infill;
- ▶ Broadhectare;
- ▶ Future Residential; and
- ▶ Low Density.

For both major Infill and broadhectare land supply areas, anticipated lot construction timing is presented. This refers to the likely timing of lot construction, not dwelling construction.

'Future Residential' land refers to land identified by the relevant municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which is has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

Table 3.2 details the residential land supply, measured in lots, by supply type across the municipal area of Wodonga as at July 2009. In total (excluding existing vacant residential lots) there is a residential lot supply of approximately 31,090. This is comprised of:

- ▶ 6,205 zoned broadhectare lots (20% of supply);
- ▶ 930 minor infill lots (3% of supply);
- ▶ 284 major infill lots (1% of supply);
- ▶ 63 vacant low density residential lots (0.2% of supply); and
- ▶ 23,608 designated future residential lots (76% of supply).

Each of the supply types are further detailed below, including a series of maps illustrating land supply areas and anticipated lot construction.

Table 4.1: Residential Lot Potential by Supply Type, 2009

SUBURB	MINOR INFILL	MAJOR INFILL	BROAD HECTARE	FUTURE RES	LOW DENSITY	TOTAL
BANDIANA	35		1,451	1,600		3,086
BARANDUDA	18		1,117	12,630	8	13,773
BONEGILLA				40	8	48
CASTLE CREEK				270		270
EBDEN			480	82		562
HUON CREEK			210	1,060	1	1,271
KILLARA (WODONGA)				1,120		1,120
LENEVA	7		805	6,650	6	7,468
STAGHORN FLAT				101	6	107
WEST WODONGA	293	111	723		34	1,161
WODONGA	577	173	1,419	55	0	2,224
WODONGA LGA	930	284	6,205	23,608	63	31,090

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

4.1 Vacant lots

A detailed assessment utilising custom GIS software to detect the incidence and location of vacant residential lots was undertaken as at July 2009. A vacant residential lot is defined as any lot that is sized less than 1,000sqm, has no existing residential dwelling/or existing use and is zoned Residential 1(R1Z). In addition vacant lots zoned Mixed Use (MUZ) is identified however, no land size is specified.

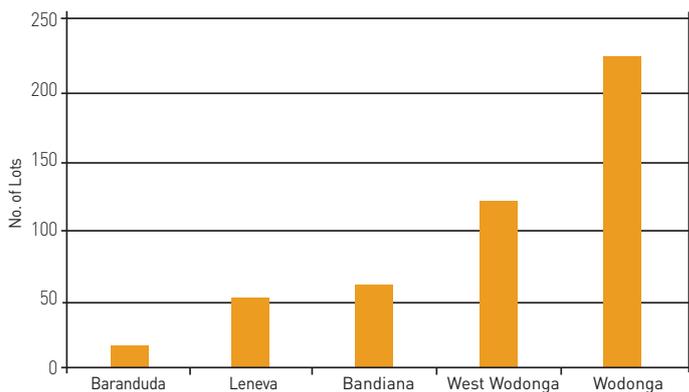
As at July 2009 there was a total residential vacant lot stock of 486, of which 89% was zoned Residential 1 (R1Z). There were 53 lots zoned Mixed Use (MUZ). The distribution of this vacant lot stock by suburb is illustrated in Graph 4.1.

The suburbs with relatively high volumes of vacant lot stock tend to be the location of broadhectare style developments, such suburbs include:

- ▶ Wodonga – 229 lots; and
- ▶ West Wodonga – 126 lots.

The existing stock of vacant allotments has the potential to satisfy approximately 1.7 years of projected demand (*Victoria In Future 2008* based). The stock of vacant lots relative to the estimated number of existing dwellings is 3.3%. These two indicators are considered to illustrate a land supply market that is functioning in terms of short and longer term land requirements.

Graph 4.1: Stock of Vacant Residential Allotments, 2009



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

4.2 Minor Infill Supply

As at July 2009, there was a residential lot capacity within minor infill sites of approximately 930. The locations of these minor infill sites are concentrated in the suburbs of Wodonga and West Wodonga.

Minor infill lot potential represents 12% of the total existing zoned residential land supply across the municipal area of Wodonga. There are 189 minor infill sites across the municipality.

4.3 Major Infill Supply

As at July 2009, there was a residential lot capacity within major infill sites of approximately 284, all of which were located in the suburbs of Wodonga and West Wodonga.

Major infill lot potential represents 4% of the total existing zoned residential land supply across the municipal area of Wodonga. There are 9 major infill sites across the municipality.

Table 4.2: Anticipated Lot Construction Activity – Major Infill, 2009

SUBURB	DEVELOPMENT TIMING				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
WEST WODONGA	47	64			111
WODONGA	58	85	30		173
WODONGA LGA	105	149	30		284

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 50 lots per annum will be constructed within major infill sites.

4.4 Broadhectare Supply

As at July 2009, there was a residential lot capacity within broadhectare areas of approximately 6,200. There are particularly high numbers of zoned broadhectare lot stock in:

- ▶ Bandiana (1,450 lot potential or 24% of total broadhectare supply);
- ▶ Wodonga (1,419 lot potential or 23% of total broadhectare supply); and
- ▶ Baranduda (1,117 lot potential or 18% of total broadhectare supply).

Broadhectare lot potential represents 83% of the total existing zoned residential land supply across the municipal area of Wodonga.

Table 4.3: Anticipated Lot Construction Activity – Broadhectare, 2009

SUBURB	DEVELOPMENT TIMING				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
BANDIANA		94	269	1,088	1,451
BARANDUDA	113	146	168	690	1,117
EBDEN				480	480
HUON CREEK		105		105	210
LENEVA	54	358	38	355	805
WEST WODONGA	363	285	60	15	723
WODONGA	179	130	1,110		1,419
WODONGA LGA	709	1,118	1,645	2,733	6,205

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 365 lots per annum will be constructed within existing zoned broadhectare areas.

4.5 Future Residential Land Supply

Analysis has been undertaken in conjunction with municipal planning officers to identify the location and associated lot yield of future residential land stocks. Future residential land stocks are identified by the Wodonga City Council and contained within various municipal planning policy and strategy planning documents.

Future residential land stocks are not zoned to support immediate 'normal' residential development, and rezoning and structure planning processes are required before normal residential development proceeds.

Within the municipal area of Wodonga, there is an estimated lot potential within Future Residential areas of approximately 23,600. Currently land designated for urban development zoned Urban Growth (UGZ) represents 7% of the Future Residential land stocks or 1,700 lots, all of which is located in Baranduda. The Urban Growth Zone, in conjunction with PSPs, will:

- ▶ manage the transition of non-urban land into urban land;
- ▶ encourage the development of well-planned and well-serviced new urban communities in accordance with an overall plan;
- ▶ reduce the number of development approvals needed in areas where an agreed plan is in place; and
- ▶ safeguard non-urban land from use and development that could prejudice its future urban development.

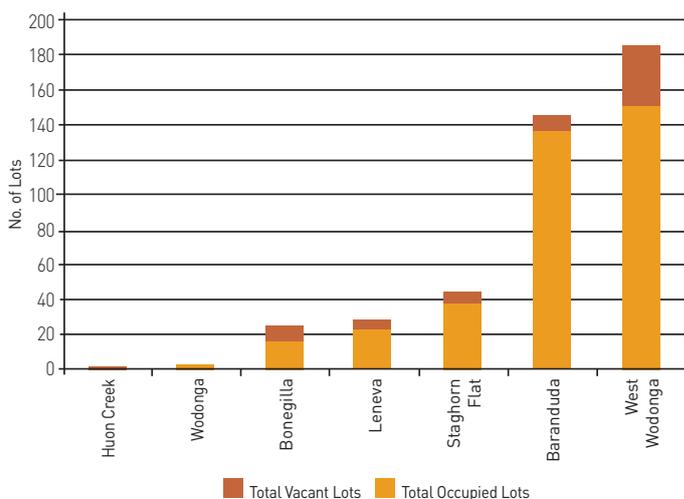
4.6 Low Density Supply

The stock of both occupied and vacant low density residential allotments have been determined on a lot by lot basis as at July 2009. A low density residential allotment is defined as all allotments that are zoned Low Density Residential (LDRZ) and Rural Living (RLZ). Occupied is defined as evidence of a 'habitable' dwelling and vacant is defined as no evidence of a habitable dwelling via the interpretation of aerial imagery.

As at July 2009 across the municipality of Wodonga there was a total lot stock of low density allotments of 429. Of this stock, 63 lots were vacant, a land vacancy rate of 15%. Graph 4.2 summarises the stock of both occupied and vacant low density residential allotments by suburb.

The vast majority (54%) of vacant low density lot stock is located within the suburbs of West Wodonga.

Graph 4.2: Stock of Vacant and Occupied 'Low Density' Allotments, 2009



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Localities with relatively high numbers of low density vacant lot stock include Traralgon (60 lots), Boolara (51 lots), Yinnar South (50 lots) and Hazelwood North (42 lots).

Summary & Conclusions

In total (excluding existing vacant residential lots) there is a residential lot supply of approximately 31,090. This is comprised of:

- ▶ 6,205 zoned broadhectare lots (20% of supply);
- ▶ 930 minor infill lots (3% of supply);
- ▶ 284 major infill lots (1% of supply);
- ▶ 63 vacant low density residential lots (0.2% of supply); and
- ▶ 23,608 designated future residential lots (76% of supply).

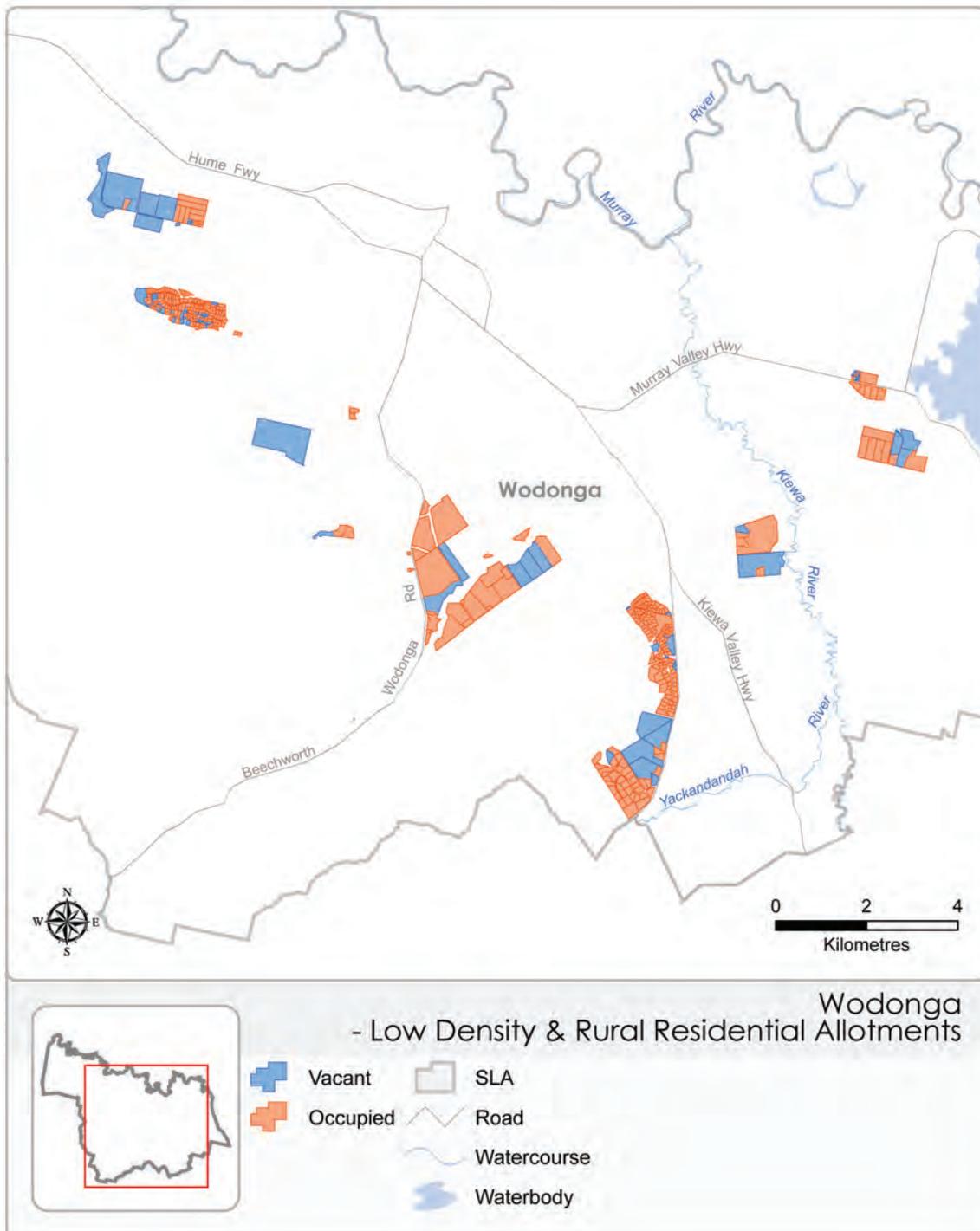
As at July 2009 there was a total residential vacant lot stock of 486, 89% of which was zoned Residential 1 (R1Z). There were 53 lots zoned Mixed Use (MUZ).

Within the municipal area of Wodonga, there is an estimated lot potential within Future Residential areas of approximately 23,608. Currently land designated for urban development zoned Urban Growth (UGZ) represents 7% of the future residential land stocks or 1,700 lots, all of which is located in Baranduda.

Based on the existing stock of vacant lots, identified zoned supply and identified future residential land stocks relative to recent construction rates and projected demand there is sufficient land to satisfy short, medium and long-term demand for residential lots.

4.7 Overview Maps

Overview Map 1: Occupied and Vacant Low Density Residential Allotments, 2009



5.0 Projected Demand

This report incorporates the most recently available demand figures to project dwelling requirements and future adequacy of residential land. These figures currently use the *Victoria in Future 2008* projections as the basis for demand, which are updated in line with state population and household projections.

Victoria in Future 2008 is the Victorian Government's official population and household projections. Information is provided for state-wide, regional and metropolitan areas as well as local government areas. *Victoria in Future 2008* reflects the latest available trends such as changes to levels of immigration or economic conditions, or changes to policy affecting population growth locations and levels, and subsequent demand for housing.

Victoria in Future 2008 projections cover the period 2006 to 2056 for the state, regional Victoria and Melbourne; for 2006 to 2036 for the Statistical Divisions in regional Victoria; and for 2006 to 2026 for local government areas and statistical local areas.

Overall, regional Victoria is projected to grow by 477,000 people in the next 30 years, compared with 320,000 in the previous 30 years. Most of this growth is projected to come from net migration from Melbourne. Strong population growth can be expected in:

- ▶ regional centres, which have diverse employment opportunities and services;
- ▶ coastal areas, which are popular locations for sea-changers such as young families and retirees; and
- ▶ tree change and other 'lifestyle' locations such as rural areas around Melbourne and the regional centres as well as the Alpine areas and the Murray River.

For the land supply assessment for Wodonga, an alternative demand scenario has been presented. This scenario is simply a view of projected demand from the Wodonga City Council due to a historically restrained land supply market.

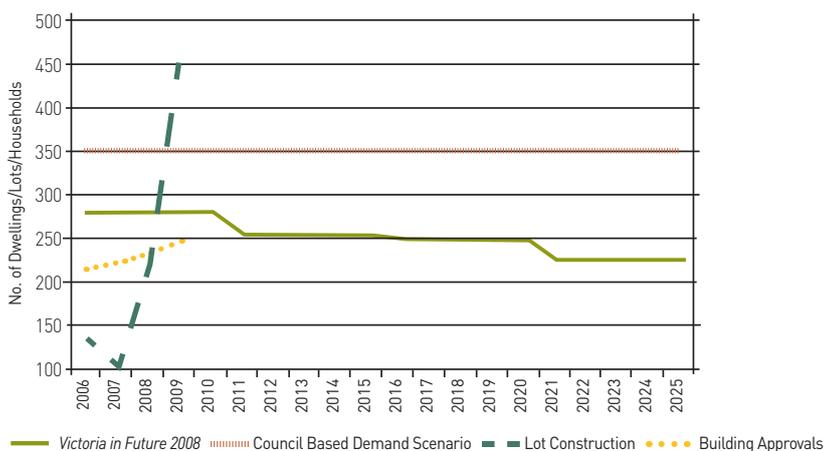
Graph 5.1 summarises the projected demand for residential dwellings for the municipal area of Wodonga.

From 2006 to 2009, it was estimated that there was an average annual demand for residential dwellings of 280. Over the same period, residential lot construction averaged 227 per annum and residential building approvals 234.

From 2011 to 2016 it is projected that the average annual demand across the municipal area of Wodonga to decrease to 253, from 2016 to 2021 – 250 per annum and 255 per annum from 2021 to 2026.

The alternative demand scenario simply assumes a constant demand of 350 dwellings per annum.

Graph 5.1: Projected Demand for Residential Dwellings, 2006 - 2026



Source: Australian Bureau of Statistics, Catalogue No. 8731.0, Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Summary & Conclusions

From 2006 to 2009, it was estimated that there was an average annual demand for residential dwellings of 280. Over the same period, residential lot construction averaged 227 per annum and residential building approvals 234.

From 2011 to 2016 it is projected that the average annual demand across the municipal area of Wodonga to decrease to 253, from 2016 to 2021 – 250 per annum and 255 per annum from 2021 to 2026.

Demand projections contained in *Victoria In Future 2008* broadly align with recent residential lot construction and building approval activity.

For the land supply assessment for Wodonga, an alternative demand scenario has been presented. This scenario is simply a view of projected demand from the Wodonga City Council due to a historically restrained land supply market.

The alternative demand scenario simply assumes a constant demand of 350 dwellings per annum.

6.0 Adequacy of Land Stocks

Analysis has been undertaken to estimate the years of residential land supply. In estimating the years of residential land supply only minor infill, major infill, zoned broadhectare and future residential supply types are considered. Demand for residential lots/dwellings is sourced from the Victorian Governments population and household projections *Victoria in Future 2008* and the alternative demand scenario outlined above.

This is a conservative approach as it does not consider the supply of existing vacant lots and demand for low density lots. Table 6.1 summarises the estimated years of residential land supply for both zoned and future residential land stocks.

Table 6.1: Estimated Years of Residential Land Supply

	LOTS						YEARS OF SUPPLY	
	Minor Infill	Major Infill	Zoned BH	Total Zoned	Future Res	Total	Total Zoned	Total Future
<i>Victoria in Future 2008</i>	930	284	6,205	7,419	23,608	31,027	15+	15+
Council Scenario	930	284	6,205	7,419	23,608	31,207	15+	15+

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

For both demand projections/scenarios the existing zoned residential land stocks is estimated to be sufficient to satisfy over 15 years of future demand. This is based on a zoned lot potential of 7,419 lots, of which:

- ▶ 6,205 lots are broadhectare;
- ▶ 930 are minor infill; and
- ▶ 284 are major infill.

In the assessment of adequacy only 'un-subdivided' land stocks are considered, vacant residential allotments do not form a component to adequacy. This is a deliberate and conservative approach.

In terms of future residential land supply stocks, there is sufficient land to satisfy over 15 years of projected demand (for both demand scenarios).

Summary & Conclusions

For zoned residential land stocks, it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy **over 15 years** of future demand.

For future residential land supply stocks, there is sufficient land to satisfy over **15 years** of projected demand.

The existing stock of vacant residential allotments is sufficient to satisfy **1.7 years** of demand. It is important that a suitable stock of vacant residential allotments is maintained to satisfy immediate demand for allotments. It is considered that one to two years supply of vacant residential allotments is a suitable buffer.

8.0 Residential Tables

Table 8.1: Minor Infill Lot Construction, 2005/06 to 2008/09

SUBURB	Year of Construction				TOTAL
	2005/06	2006/07	2007/08	2008/09	
BARANDUDA			8		8
WEST WODONGA	16	6	12	19	53
WODONGA	50	17	34	50	151
WODONGA LGA	66	23	54	69	212

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.2: Broadhectare Lot Construction, 2005/06 to 2008/09

SUBURB	Year of Construction				TOTAL
	2005/06	2006/07	2007/08	2008/09	
BANDIANA	42		63	27	132
BARANDUDA		50			50
LENEVA			64	31	95
WEST WODONGA				98	98
WODONGA		25	37	220	282
WODONGA LGA	42	75	164	376	657

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.3: Low Density Lot Construction, 2005/06 to 2008/09

SUBURB	Year of Construction				TOTAL
	2005/06	2006/07	2007/08	2008/09	
BARANDUDA	2				2
BONEGILLA			2	4	6
LENEVA	4				4
WEST WODONGA	22	4			26
WODONGA LGA	28	4	2	4	38

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.4: Minor Infill Lot Potential, 2009

SUBURB	NO. OF LOTS
BANDIANA	35
BARANDUDA	18
LENEVA	7
WEST WODONGA	293
WODONGA	577
WODONGA LGA	930

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.5: Major Infill Lot Potential and Anticipated Development Timing, 2009

SUBURB	Development Timing				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
WEST WODONGA	47	64			111
WODONGA	58	85	30		173
WODONGA LGA	105	149	30		284

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.6: Broadhectare Lot Potential and Anticipated Development Timing, 2009

SUBURB	Development Timing				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
BANDIANA		94	269	1,088	1,451
BARANDUDA	113	146	168	690	1,117
EBDEN				480	480
HUON CREEK		105		105	210
LENEVA	54	358	38	355	805
WEST WODONGA	363	285	60	15	723
WODONGA	179	130	1,110		1,419
WODONGA LGA	709	1,118	1,645	2,733	6,205

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.7: Future Residential Supply (lots), 2009

SUBURB	UGZ	UNZONED	TOTAL
BANDIANA		1,600	1,600
BARANDUDA	1,715	10,915	12,630
BONEGILLA		40	40
CASTLE CREEK		270	270
EBDEN		82	82
HUON CREEK		1,060	1,060
KILLARA (WODONGA)		1,120	1,120
LENEVA		6,650	6,650
STAGHORN FLAT		101	101
WODONGA		55	55
WODONGA LGA	1,715	21,893	23,608

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.8: Residential Vacant Lot Stock by Zone Type, 2009

SUBURB	ZONE TYPE		TOTAL
	MUZ	R1Z	
BANDIANA		60	60
BARANDUDA		18	18
LENEVA		53	53
WEST WODONGA	53	73	126
WODONGA		229	229
WODONGA LGA	53	433	486

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.9: Occupied and Vacant 'Low Density' Lot Stock, 2009

SUBURB	LDRZ			RLZ			TOTAL	
	VACANT	OCCUPIED	VACANCY RATE (%)	VACANT	OCCUPIED	VACANCY RATE (%)	TOTAL VACANT LOTS	TOTAL VACANCY RATE (%)
BARANDUDA	6	133	4%	2	4	33%	8	6%
BONEGILLA	5	9	36%	3	7	30%	8	33%
HUON CREEK	1	0	100%				1	100%
LENEVA				6	22	21%	6	21%
STAGHORN FLAT				6	38	14%	6	14%
WEST WODONGA	30	145	17%	4	6	40%	34	18%
WODONGA	0	2	0%				0	0%
WODONGA LGA	42	289	13%	21	77	21%	63	15%

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.10(a): Estimated and Projected Number of Households, 2006 to 2026
(Victoria in Future 2008 Based)

SLA Name	2006	2011	2016	2021	2026
WODONGA LGA	13,588	14,986	16,251	17,500	18,626

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Table 8.10(b): Estimated and Projected Average Annual Change in the Number of Households, 2006 to 2026 (Victoria in Future 2008 Based)

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
WODONGA LGA	280	253	250	225

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Table 8.10(c): Estimated and Projected Average Annual Percentage Change in the Number of Households, 2006 to 2026 (Victoria in Future 2008 Based)

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
WODONGA LGA	2.0%	1.6%	1.5%	1.3%

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Table 8.11(a): Estimated and Projected Number of Households, 2006 to 2026 (Council Based)

SLA Name	2006	2011	2016	2021	2026
WODONGA LGA	13,588	15,338	17,088	18,838	20,588

Source: Wodonga City Council, 2010

Table 8.11(b): Estimated and Projected Average Annual Change in the Number of Households, 2006 to 2026 (Council Based)

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
WODONGA LGA	350	350	350	350

Source: Wodonga City Council, 2010

Table 8.11(c): Estimated and Projected Average Annual Percentage Change in the Number of Households, 2006 to 2026 (Council Based)

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
WODONGA LGA	2.5%	2.2%	2.0%	1.8%

Source: Wodonga City Council, 2010

Locations of Suburbs and Statistical Local Areas – Wodonga

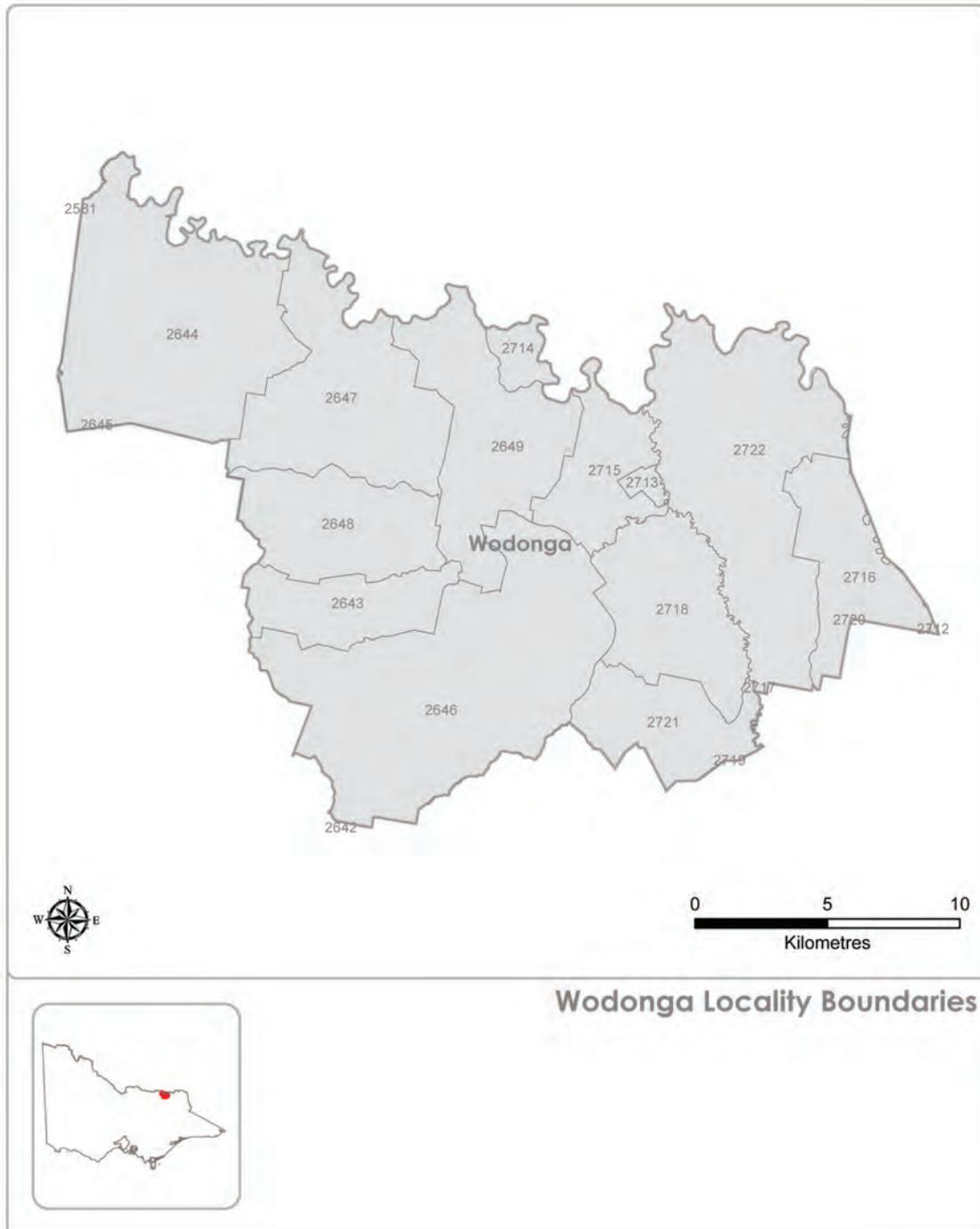


Table 8.12: List of Suburbs by SLA

SUBURB	REF #
BANDIANA	2715
BARANDUDA	2718
BARNAWARTHA	2581
BARNAWARTHA NORTH	2644
BETHANGA	2712
BONEGILLA	2722
CASTLE CREEK	2643
EBDEN	2716
GATEWAY ISLAND	2714
HUON	2720
HUON CREEK	2648
INDIGO VALLEY	2645
KIEWA	2719
KILLARA (WODONGA)	2713
LENEVA	2646
STAGHORN FLAT	2721
TANGAMBALANGA	2717
WEST WODONGA	2647
WODONGA	2649
YACKANDANDAH	2642

Broadhectare land

Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.

Constructed lot

For the purposes of the UDP, a lot is created when land has been subdivided ('constructed') whether or not a separate title has been issued.

Dwelling

A building used as a self-contained residence, may include house, apartment, student accommodation, retirement or aged care facilities or a mobile dwelling such as a caravan.

Future residential land

Land identified by the relevant municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which is has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

Greenfield sites (see also Broadhectare land)

Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.

High density

For the purposes of UDP reporting, redevelopment projects that are four storeys or greater are considered high density.

Local Government Area (LGA)

A geographical area that is administered by a local council. Victoria has 79 LGAs.

Lot (broadhectare)

For the purposes of the UDP, a lot is created when land has been subdivided ('constructed') whether or not a separate title has been issued.

Lot density (broadhectare land)

Number of potential lots associated to land parcels. Net density excludes non-residential land uses except local roads and local open space, while gross lot density includes other land uses.

Low density land

Land zoned Low Density Residential (LDRZ) or Rural Living (RLZ).

Major infill

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha.

Major redevelopment sites

Sites predominantly in existing urban areas that are proposed to be converted or redeveloped for residential purposes and that will yield 10 or more dwellings.

MapsOnline

An interactive online program that gives users the ability to search for specific projects, generate reports, and print or download maps and statistical reports. It also allows the user to search for specific land supply areas by region or LGA, estate name, Melway reference, street address or lot number, and contains mapping and statistical information sourced through the UDP. Registered users can also make site-specific feedback on-line.

Medium density

For the purposes of UDP reporting, redevelopment projects consisting of attached one, two and three-storey dwellings are considered medium density.

Minor infill

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less from 1,000sqm to 1ha.

Precinct Structure Plans

In the Urban Growth Zone (UGZ), the precinct structure plan (PSP) is the key document that triggers the conversion of non-urban land into urban land. A precinct structure plan is a long-term strategic plan that describes how a precinct or a series of sites will be developed.

Statistical Local Area (SLA)

A geographical area created by the Australian Bureau of Statistics for statistical purposes. Victoria is divided into 200 SLAs. SLAs may be the same as an LGA or in most cases several SLAs aggregate to form LGAs.

Vacant Lots

Existing residential vacant lots, sized less than 1,000sqm. A vacant lot is defined as no existing habitable dwelling or 'significant' existing use such as a playground or park.



Acknowledgements

This Urban Development Program report would not have been possible with the assistance and contribution of Spatial Economics Pty Ltd, the Wodonga City Council and Regional Development Victoria.

The Department of Planning and Community Development would like to thank the representatives from these organisations for their valuable contributions.

