Urban Development Program 2013

Regional Residential Report

Shire of East Gippsland

State Government Victoria
Department of Transport, Planning and Local Infrastructure

ACKNOWLEDGEMENTS

This Urban Development Program was undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Transport, Planning and Local Infrastructure.
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EXECUTIVE SUMMARY

The Urban Development Program for Regional Victoria provides an analysis of supply and demand for residential and industrial land across parts of regional Victoria. Assessments completed to date include the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. Residential land supply assessments for the G21 consortium of councils are available on the G21 Regional Growth Plan - Implementation Plan website.

Additional land supply assessments undertaken for the municipalities of Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland are also near completion.

This round of land supply assessments include the municipal areas of: Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla.

This component provides information on residential supply and demand for the Shire of East Gippsland.

The following residential land supply assessment was undertaken by Spatial Economics Pty Ltd and commissioned by the Department of Transport, Planning and Local Infrastructure in conjunction with the Shire of East Gippsland.

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

RECENT ACTIVITY

As measured from July 2006 to June 2012 residential building approval activity within the Shire of East Gippsland has averaged 391 per annum. The vast majority of building approvals (94%) since July 2006 have been separate houses, the remaining 6% for medium density dwellings.

From July 2006 to June 2012 there was an average annual residential lot construction of 283. The majority (48%) were broadhectare/major infill lot construction, followed by minor infill lots at 29% and 23% rural residential. The majority (25%) of residential lot construction activity was located within the suburbs of Eastwood, followed by Lakes Entrance (9%), Forge Creek (7%), Metung (7%), Wy Yung (7%), Paynesville (6%) and Bairnsdale (6%).

PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2031 there will be a total dwelling requirement of 10,139 (507 average per annum).

The average annual projected demand by SLA within the Shire of East Gippsland is:

- Bairnsdale: 393 dwellings per annum (e.g. Bairnsdale (part), Paynesville, Lakes Entrance);
- Orbost: 52 dwellings per annum (e.g. Orbost, Mallacoota, Lake Tyers Beach);
- South-West: 47 dwellings per annum (e.g. Bairnsdale (part), Lucknow, Lindenow); and

- Balance: 14 dwellings per annum (e.g. Swifts Creek, Omeo).

An alternative demand projection has been developed that is based on recent (2006 to 2012) building approval activity - this growth scenario results in a 5% (494 dwellings) decrease in total dwelling requirements from 2011 to 2031.

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total, there is a residential lot supply of approximately 8,686. This is comprised of:

- 4,343 zoned broadhectare/major infill lots (50% of supply);
- 1,103 vacant rural residential lots (13% of supply); and
- 3,240 designated future residential lots (37% of supply).

As at March 2013, there was 1,887 minor infill lots identified. Of these lots, 312 were sized greater than 2,000sqm or 16% of the identified lots.

As at March 2013, there was a zoned residential lot capacity within broadhectare/major infill areas of approximately 4,343, of which 18% (818 lots) is located in Bairnsdale, 733 lots in Lucknow and 459 lots in Lakes Entrance.

Within the Shire of East Gippsland, there is an estimated lot potential within Future Residential areas of approximately 3,240. Of this lot potential:

- 1,120 lots are located in Lakes Entrance;
- 850 lots in Paynesville/Forge Creek*;
- 680 in Eagle Point;
- 390 in Lucknow; and
- 200 in Lake Tyers Beach.

* Note that although this land falls within the 'State Suburb Code' of Forge Creek as classified by the Australian Bureau of Statistics, it is located on the western edge of Paynesville settlement.

As at March 2013 across the Shire of East Gippsland there was a total lot stock of rural residential allotments of 3,932. Of this stock, 1,103 lots were vacant, a lot vacancy rate of 28%. By zone type, there were 2,288 Low Density Residential (LDRZ) allotments, of which 834 were vacant across the municipality, a lot vacancy of 36%. In comparison, there were a total of 1,644 Rural Living (RLZ) zoned allotments, of which 269 were vacant – a lot vacancy rate of 16%.

YEARS OF RESIDENTIAL LAND SUPPLY

Two projected demand scenarios are used to assess the years of residential land stocks, the outcomes are summarised below.

Victoria in Future 2012 Demand Scenario

In terms of zoned broadhectare and major infill residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA and selected urban centre is sufficient to satisfy:

- East Gippsland - Bairnsdale, 15+ years of demand;
    - Bairnsdale – 12 years

- Lakes Entrance – 14 years
    - Paynesville/Eagle Point – 15+ years
- East Gippsland – Orbost, 15+ years of demand; and
    - Mallacoota – 8 years
    - Orbost – n.a.
- East Gippsland – South West, 15+ years of demand.

In terms of future residential land supply stocks, there is sufficient land to satisfy 13 years of projected demand. Future residential land stocks by SLA and selected urban centre is sufficient to satisfy:

- East Gippsland - Bairnsdale, 12 years of demand; and
    - Bairnsdale – 3 years
    - Lakes Entrance – 15+ years
    - Paynesville/Eagle Point – 15+ years
- East Gippsland – Orbost, 15+ years of demand;
    - Mallacoota – n.a.
    - Orbost – n.a.

Historic Trend Based Demand Scenario

In terms of zoned broadhectare/major infill residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy 15+ years of future demand. In regard to future (unzoned) residential land stocks, there is sufficient land to meet 13 years of future demand.

Conclusions and Current Actions

In summary there is an adequate stock of zoned residential land to meet *Victoria in Future 2012* and trend based consumption rates within the Shire of Campaspe, although this differs across the various settlements. Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand.

East Gippsland Shire Council has prepared a 'Bairnsdale Growth Strategy' to help guide the growth and development of Bairnsdale over the next 20 years. It contains recommendations for a growth boundary, future residential growth areas, improvements to existing neighbourhoods, revitalisation of the central business district, commercial and industrial growth, and a range of other matters.

Similarly, structure plans for precincts in Paynesville and Eagle Point are being developed, which aim to provide a clear guide for the subdivision of residential zoned land and the development of community infrastructure over the next 20 years.

Amendment C112 proposes to insert the Lakes Entrance Northern Growth Area Outline Development Plan into the East Gippsland Planning Scheme and rezone land within the Lakes Entrance Northern Growth Area from Farming Zone 3 to Residential Zone 1.

1.0 INTRODUCTION

1.1 PURPOSE AND CONTEXT

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.

To achieve the primary purpose the Urban Development Program provides 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; and
- 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 PROGRAM CONTEXT

During 2009-2010, the Urban Development Program was expanded across key provincial areas across regional Victoria, and is incrementally being rolled out across the State. Assessments completed to date include the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. Residential land supply assessments for the G21 consortium of councils are available on the G21 Regional Growth Plan - Implementation Plan website.

Additional land supply assessments undertaken for the municipalities of Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland are also near completion.

This round of land supply assessments include the municipal areas of: Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla.

The 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 industrial and residential land supply assessments were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Transport, Planning and Local Infrastructure in conjunction with the associated councils.

1.3 URBAN DEVELOPMENT PROGRAM REPORTS

The 2013 Urban Development Program Reports for Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla, as well as additional Regional Reports and the metropolitan Urban Development Program Annual Report, are available online at www.dpcd.vic.gov.au/urbandevelopmentprogram

For more information about the Urban Development Program, email the Department of Planning and Community Development at urbandevelopment.program@dtpli.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 the years of supply of current land stocks. In addition, key definitions of terms used within the following assessment are detailed in the glossary of terms at the end of this report.

Information is presented at both a Statistical Local Area (SLA) and suburb (Australian Bureau of Statistics definition) level. A map highlighting the location of these boundaries is located within the data appendices. The report retains ABS terminology for the geographic areas, however it is appreciated that the term 'suburbs' includes urban and rural areas.

Assessments of land supply are dependant on the availability of aerial imagery. The most current imagery available for this assessment was taken during the summer of 2009/2010.

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 Population and Household Projections 2011-2031 for Victoria and Its Regions, released by the (former) Department of Planning and Community Development and outlined in *Victoria in Future 2012*, 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).

RESIDENTIAL LAND

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

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

Major Infill: Undeveloped land or sites identified for redevelopment 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 has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

Rural Residential: Land zoned or identified for future Low Density Residential (LDRZ) or Rural Living (RLZ).

RESIDENTIAL LOT CONSTRUCTION

Residential lot construction has been determined via the processes established within the State Government's 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 2012, additional analysis has been included to identify lot construction to December 2012.

LOT YIELDS

Lot yields have been established on a parcel by parcel basis for the following land supply types: 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 council planning officers.

A small number of supply sites have been allocated a zero lot yield due to a number of varying factors, these include but not limited to:

- unlikely to be developed over the next 15 years due to issues such as significant ownership fragmentation on relatively small parcels of land;
- subdivision restricted until sewerage is provided;
- the site is within an area of low demand and is unlikely to be developed with any certainty within the foreseeable future; and
- potential/likely lot density could be low.

Sites with a zero lot yield have been identified and are summarised by location and area.

DEVELOPMENT TIMING

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

- 1 to 2 years (2013–2014);
- 3 to 5 years (2015–2017);
- 6 to 10 years (2018–2022);
- 11 years or more (2023 and beyond); and
- No timing.

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.

Confidence about lot yields and staging declines for developments proposed beyond 5 years as it is industry practice to regard developments beyond this period with less certainty in terms of exact staging, timing and yields.

A no timing category has been established for potential residential development sites that are within low demand areas (generally small outlying settlements). These sites typically in addition are allocated a zero potential lot yield. They are identified as potential and are measured by area.

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 is 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.

RURAL RESIDENTIAL

Rural 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. The assessment is undertaken on the date of the latest aerial imagery.

YEARS OF SUPPLY FOR RESIDENTIAL LAND

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 municipality. 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 years of supply of residential stocks, the Regional Urban Development Program assesses the existing stock of residential land (major infill, broadhectare and future residential) relative to projected demand.

In assessing the number of years of broadhectare, major infill and designated future (unzoned) residential land supply, only a component of the total projected demand is apportioned to estimate future demand for broadhectare and major infill supply. The remainder is apportioned for future demand for other forms of residential supply such as low density and rural living.

The number of 'years of supply' of residential land 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.

Two projected demand scenarios are illustrated:

- Dwelling requirements contained within the (former) DPCD's Population and Household Projections (*Victoria in Future 2012*); and
- Recent residential building approval trends (2006 to 2012).

Both sets of projections are discounted by the historic average of total broadhectare and major infill lot construction relative to total residential lot construction activity. In addition, the historic trend scenario applies the projected proportional rate of change as identified within the population projections.

3.0 OVERVIEW

East Gippsland Shire covers over 21,000 square kilometres, stretching from west of Bairnsdale to the NSW border. This diverse region make up 10 per cent of the state, with over 70 per cent as National Park, State forest or other Crown land.

East Gippsland has an abundance of natural and environmental resources: a temperate climate, Australia's largest navigable inland lake system, an extensive coastline and areas of stunning beauty make the Shire a popular choice for sea and tree-change lifestyle seekers.[1]

This report covers the trends and shifts in building activity across the Shire of East Gippsland, 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 Shire of east Gippsland. It is supported by datasets from the Australian Bureau of Statistics.

[1] Council website

4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction and dwelling approvals across the Shire of East Gippsland. Residential lot construction activity is detailed from July 2006 to March 2013 and is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential lot construction is further analysed by supply type/location, namely:

- Minor Infill;
- Broadhectare/Major Infill (combined); and
- Rural Residential.

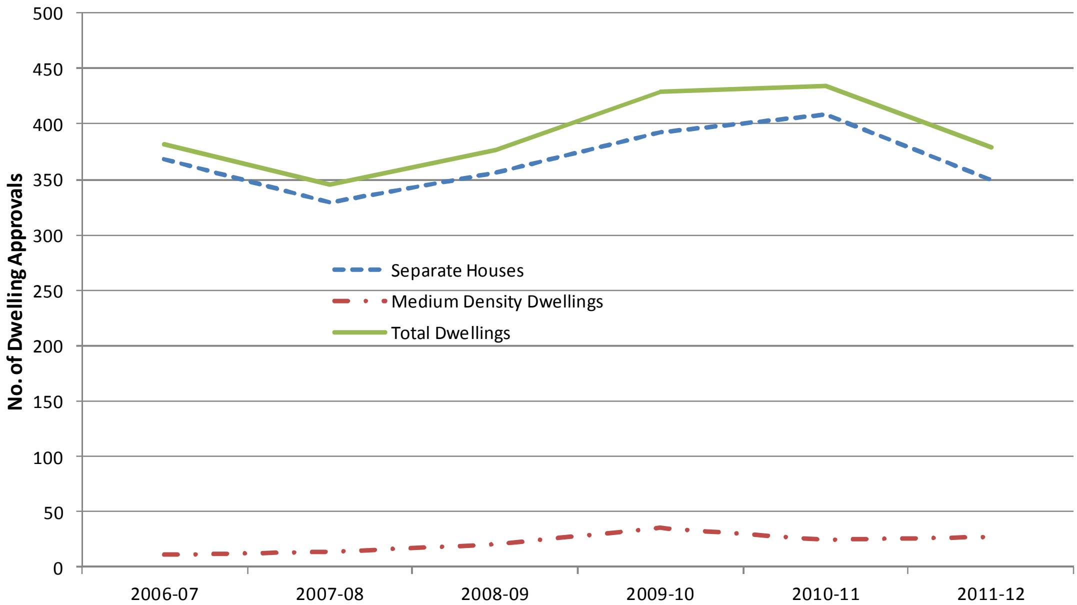
4.1 RESIDENTIAL BUILDING APPROVALS

As measured from July 2006 to June 2012 residential building approval activity within the Shire of East Gippsland has averaged 391 per annum, the amount of building approval activity as measured on an annual basis has been varied, peaking at 435 in 2010-11 and troughed at 346 in 2007-08.

Graph 1 illustrates the amount of building approval activity by dwelling type on an annual basis for the Shire of East Gippsland.

The vast majority of building approvals (94%) since July 2006 have been separate houses, the remaining 6% for medium density dwellings.

Graph 1: Number of Residential Building Approvals by Type, July 1996 to June 2012



Source: *Australian Bureau of Statistics, Catalogue No.8731.0*

The majority (72% or 280 per annum) of building approval activity since 2006 has been located within the Statistical Local Area (SLA) of Bairnsdale, which includes the urban centres of Bairnsdale, Paynesville and Lakes Entrance.

4.2 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 June 2012. Lot construction activity has been classified into distinct supply types and or supply locations as defined above.

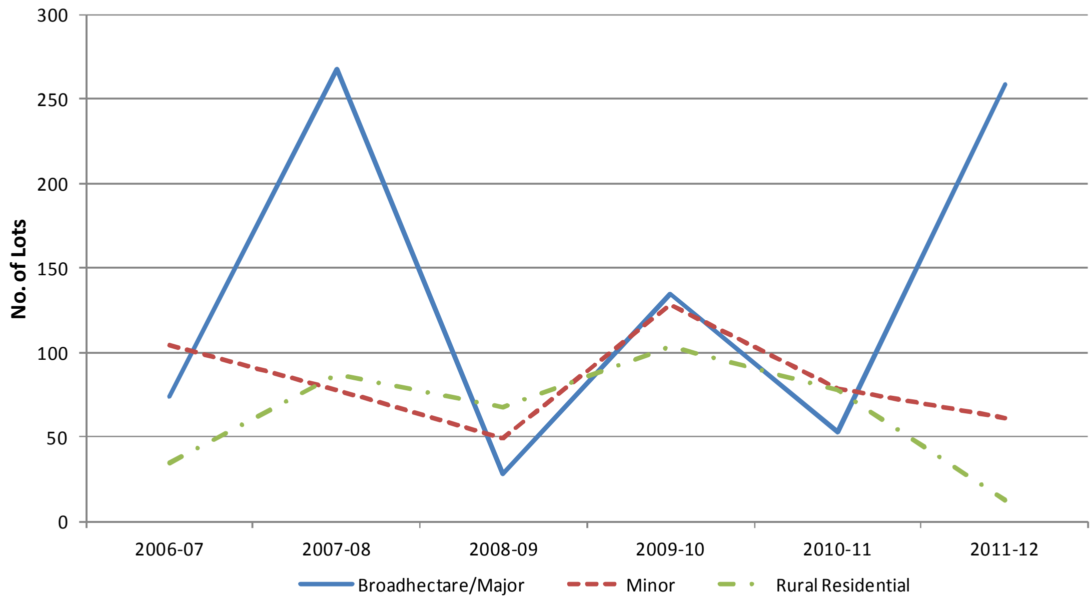
Graph 2 summarises the amount of residential lot construction by supply type for the Shire of East Gippsland. From July 2006 to June 2012 there was an average annual residential lot construction of 283. The majority (48%) were broadhectare/major infill lot construction, followed by minor infill lots at 29% and 23% rural residential.

In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2008/09 at 145 lots and 'peaked' in 2007/08 at 433 lots.

The lot construction variance over-time is a typical trend illustrated from the land development industry and indicates no significant supply or policy issues. In addition, the significant difference between lot construction and building approval activity illustrates the construction of dwellings on existing vacant lots, of which there is still considerable stock.

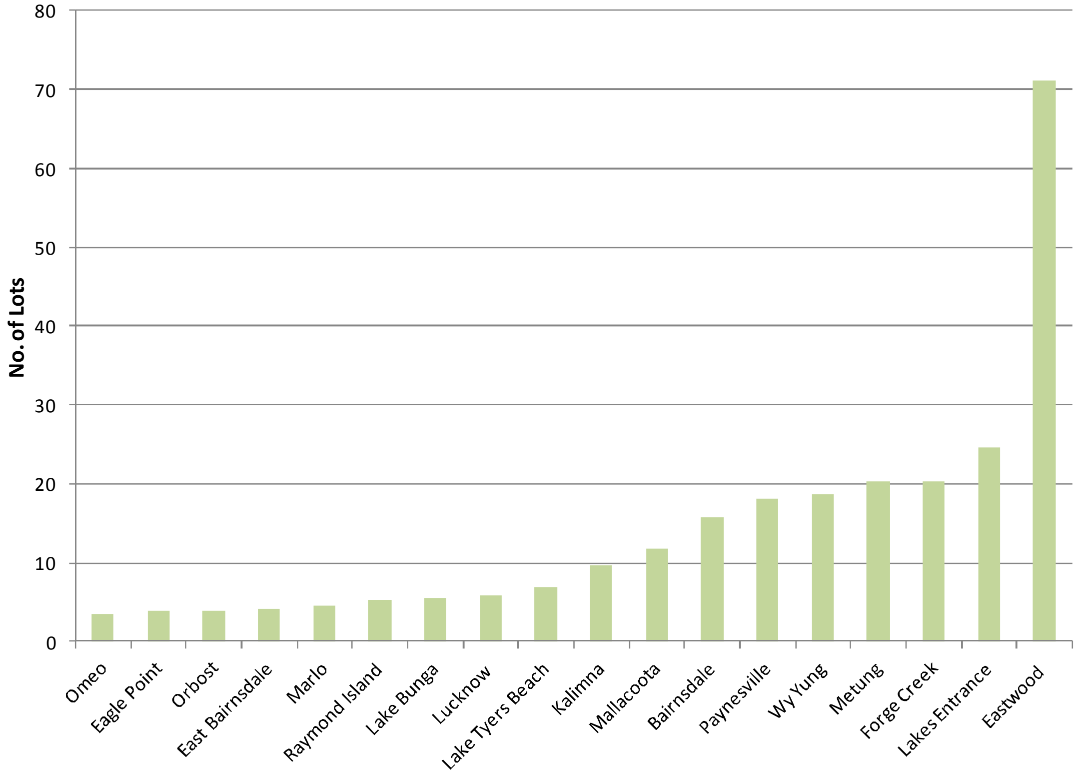
Graph 3 illustrates the average annual volume of all residential lot production by suburb. The majority (25%) of residential lot construction activity was located within the suburbs of Eastwood, followed by Lakes Entrance (9%), Forge Creek (7%), Metung (7%), Wy Yung (7%), Paynesville (6%) and Bairnsdale (6%).

Graph 2: Number of Residential Lots Constructed by Supply Type, July 2006 to June 2012



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Graph 3: Average Annual Number of Residential Lots Constructed by Suburb, July 2006 to June 2012



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
Note: *Includes – broadhectare, major infill, minor infill and rural residential lot construction.*

4.2.1 MINOR INFILL LOT CONSTRUCTION

Minor infill lot construction activity as measured from July 2006 to June 2012 across the Shire of East Gippsland averaged 83 lots per annum. This represents 29% of all residential lot construction activity across the municipality.

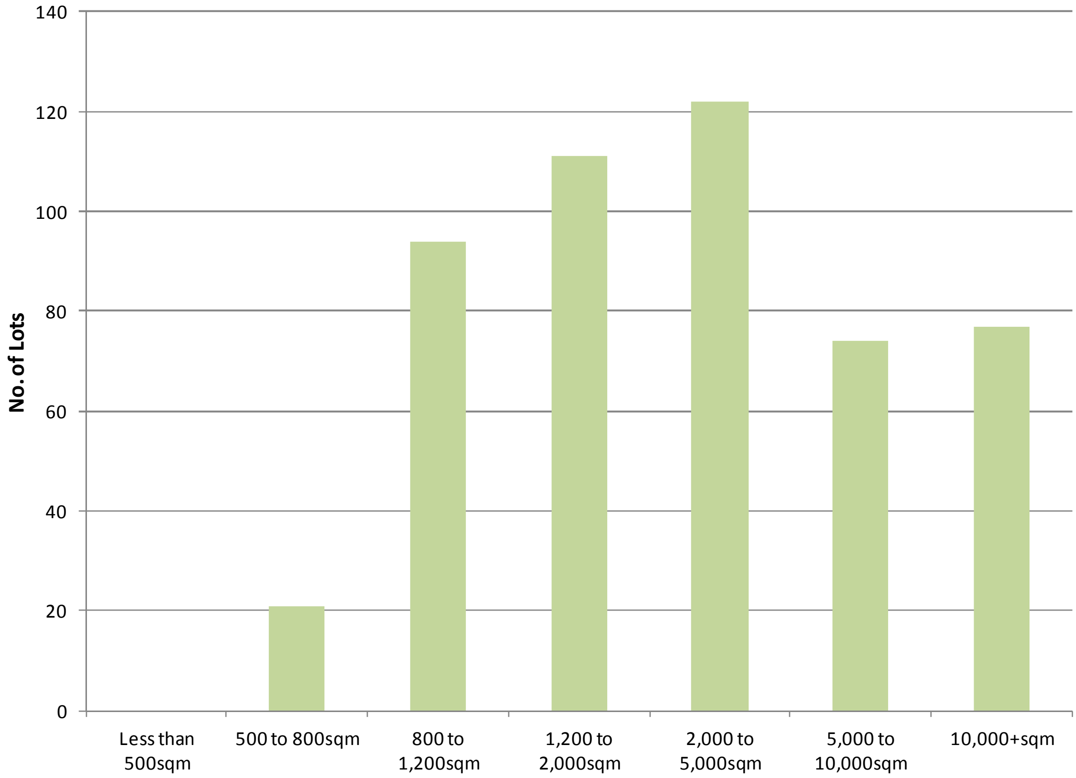
Minor infill lot construction activity was primarily concentrated within the established urban area of Bairnsdale (15% of activity), followed by Lakes Entrance (15%), Paynesville (11%) and Mallacoota (6%).

As measured annually from July 2006 to June 2012, the amount of minor infill lot construction activity has varied. In the years 2006-07 to 2008-09 construction activity ranged between 104 and 49 increasing to 128 in 2009-10. As measured in 2011-12 there were 61 minor infill lots constructed.

Analysis has been undertaken to determine the 'parent' lot size of subdivided minor infill lots, specifically the lot size prior to subdivision. Graph 4 summarises the number of minor infill lot construction projects by selected 'parent' lot size cohorts.

Of the 499 minor infill lot constructed, 55% were constructed on 'parent' lots sized greater than 2,000sqm and 22% on lots sized between 1,200 to 2,000sqm.

Graph 4: Parent Lot Size of Minor Infill Lot Subdivision, July 2006 to June 2012



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
Note: *Parent lot size refers to the size of the allotment prior to subdivision.*

4.2.2 BROADHECTARE AND MAJOR INFILL LOT CONSTRUCTION

Broadhectare/Major Infill lot construction activity as measured from July 2006 to June 2012 across the Shire of East Gippsland averaged 136 lots per annum. This represents 48% of all residential lot construction activity across the municipality.

Broadhectare/major infill lot construction activity was primarily located within the suburb of Eastwood and to a lesser degree Forge Creek.

As measured annually from July 2006 to June 2012, the amount of broadhectare lot construction activity has varied significantly. Broadhectare/major infill lot construction activity peaked in 2007-08 at 268 lots and 258 lots in 2011-12 and low levels of activity recorded in 2008-09 at 28 lots and 53 lots in 2010-11.

4.2.3 RURAL RESIDENTIAL LOT CONSTRUCTION

Rural Residential lot construction activity as measured from July 2006 to June 2012 across the Shire of East Gippsland has averaged 64 lots per annum. This represents 23% of all residential lot construction activity across the municipality.

Of the rural residential lot construction activity, 64% was zoned Low Density Residential (LDRZ), the remaining Rural Living (RLZ). The majority of this subdivision activity was located in the suburbs of Metung and Wy Yung.

From July 2006 to June 2012 there was an average annual residential lot construction of 283. The majority (48%) were broadhectare/major infill lot construction, followed by minor infill lots at 29% and 23% rural residential.

The majority (25%) of residential lot construction activity was located within the suburbs of Eastwood, followed by Lakes Entrance (9%), Forge Creek (7%), Metung (7%), Wy Yung (7%), Paynesville (6%) and Bairnsdale (6%).

As measured from July 2006 to June 2012 residential building approval activity within the municipal area of East Gippsland has averaged 391 per annum, the vast majority of building approvals (94%) since July 2006 have been separate houses

Analysis of the amount of building approvals and residential lot construction overall indicates a functioning residential land market across the municipal area of East Gippsland. The significant difference between lot construction and building approval activity illustrates the construction of dwellings on existing vacant lots, of which there is still considerable stock.

5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the Shire of East Gippsland as at March 2013. 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:

- Minor Infill;
- Broadhectare & Major Infill; and
- Rural Residential.

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.

Table 1 details the residential land supply, measured in lots, by supply type across the Shire of East Gippsland as at March 2013. In total, there is a residential lot supply of approximately 8,686. This is comprised of:

- 4,343 zoned broadhectare/major infill lots (50% of supply);
- 1,103 vacant rural residential lots (13% of supply); and
- 3,240 designated future residential lots (37% of supply).

Each of the supply types are further detailed below, including maps of each of the supply type, including the location of recent residential lot construction activity.

Table 1: Residential Lot Potential by Supply Type, March 2013

SLA/Suburb/LGA	Lots				No Estimated Yield (Area ha) - Broadhectare/ Major
	Broadhectare/ Major	Rural Residential	Future (unzoned)	Total Lots	
E. Gippsland (S) - Bairnsdale	***2,688***	***774***	***3,040***	***6,502***	***43.12***
Bairnsdale	20	2	0	22	1.03
Eagle Point	374	16	680	1,070	0
East Bairnsdale	252	5	0	257	14.22
Eastwood (Vic.)	152	1	0	153	3.92
Forge Creek /Paynesville	350	37	850	1,237	0
Johnsonville	16	7	0	23	6.63
Kalimna	25	1	0	26	0
Lake Bunga	129	1	0	130	7.18
Lakes Entrance	459	0	1,120	1,579	0
Lucknow (Vic.)	176	5	390	571	0
Metung	406	565	0	971	0
Newlands Arm	0	17	0	17	0
Nicholson (Vic.)	0	21	0	21	0
Nungurner	0	24	0	24	0
Ocean Grange	0	10	0	10	0
Paynesville (Vic.)	250	0	0	250	0
Raymond Island	0	16	0	16	0
Sarsfield	0	9	0	9	0
Swan Reach (Vic.)	79	10	0	89	7.18
Tambo Upper	0	2	0	2	0
Wy Yung	0	25	0	25	2.96
E. Gippsland (S) - Orbost	***198***	***157***	***200***	***555***	***71.63***
Bendoc	0	0	0	0	6.07
Bete Bolong	0	2	0	2	0
Bruthen	0	4	0	4	0
Buchan	8	0	0	8	41.74
Cann River	0	0	0	0	1.32
Genoa	0	13	0	13	0
Lake Tyers Beach	48	10	200	258	0
Lakes Entrance	0	32	0	32	0
Mallacoota	28	32	0	60	7.19
Marlo	106	40	0	146	0
Newmerella	0	2	0	2	0
Nowa Nowa	0	2	0	2	6.66
Orbost	0	1	0	1	3.19
Swan Reach (Vic.)	8	19	0	27	5.46

E. Gippsland (S) - South-West	***1,457***	***105***	***0***	***1,562***	***0***
Bairnsdale	798	0	0	798	0
Dargo	0	8	0	8	0
Granite Rock	0	6	0	6	0
Lindenow	44	3	0	47	0
Lindenow South	58	11	0	69	0
Lucknow (Vic.)	557	24	0	581	0
Mount Taylor	0	3	0	3	0
Sarsfield	0	7	0	7	0
Wy Yung	0	43	0	43	0
E. Gippsland (S) Bal	***0***	***67***	***0***	***67***	***22.59***
Benambra	0	0	0	0	5.91
Bruthen	0	14	0	14	0
Mossiface	0	11	0	11	0
Omeo	0	35	0	35	4.17
Reedy Flat	0	0	0	0	8.86
Sarsfield	0	7	0	7	0
Swifts Creek	0	0	0	0	3.65
East Gippsland LGA	**4,343**	**1,103**	**3,240**	**8,686**	**137.34**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
Note: *Rural Residential supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments. It does not assess the development capacity of existing zoned lots developed with a single dwelling or the development potential of vacant lots.*

5.1 MINOR INFILL SUPPLY

A parcel by parcel assessment was undertaken to identify minor infill supply, specifically zoned vacant allotments sized less than one hectare. The assessment is based on municipal valuation data as at March 2013. The identification of vacant allotments sized less than one hectare does not provide an estimated dwelling yield. Rather it simply identifies the vacant allotment by lot size and location.

Dwelling yields on such allotments can vary significantly, examples range from:

- 800sqm vacant allotment within a broadhectare estate typically would yield one dwelling;
- 800sqm vacant allotment within the urban centre, could typically range from one to four dwellings; and
- 5,000sqm allotment within a township zone (un-sewered) one dwelling versus anything from five plus dwellings within a larger urban settlement.

As at March 2013, there was 1,887 minor infill lots identified. Of these lots, 312 were sized greater than 2,000sqm or 16% of the identified lots. In addition there were:

- 341 vacant lots sized between 1,200 to 2,000sqm;
- 685 lots sized from 800 to 1,200sqm; and
- 478 lots sized from 500 to 800sqm.

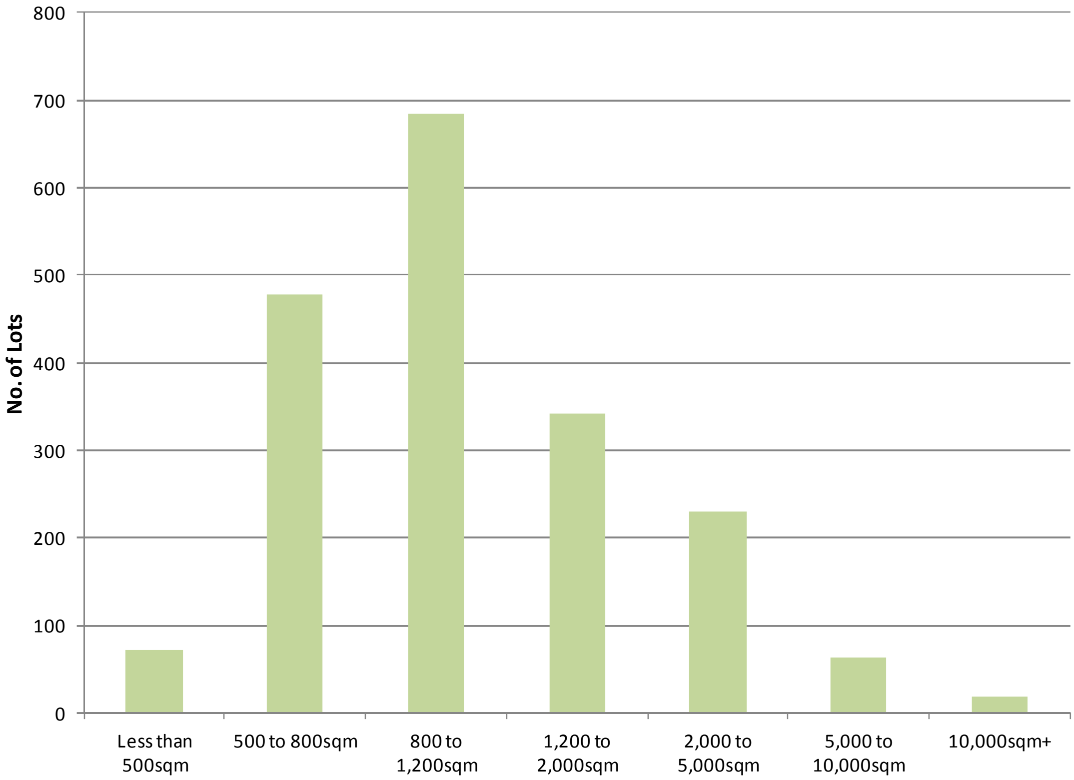
Graph 5 summarises the size distribution of identified minor infill supply.

Most of these allotments have potential to yield multiple lots post subdivision. As noted previously 29% of lot construction activity across East Gippsland was minor infill.

The majority of minor infill supply is located in the suburbs of:

- Lakes Entrance – 290 lots;
- Paynesville – 220 lots;
- Mallacoota – 165 lots;
- Newlands Arm – 149 lots; and
- Eastwood – 145 lots.

Graph 5: Minor Infill Supply – Number of Vacant Zoned Residential Allotments, by Lot Size Cohort, March 2013



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012*

5.2 BROADHECTARE AND MAJOR INFILL SUPPLY

As at March 2013, there was a zoned residential lot capacity within broadhectare/major infill areas of approximately 4,343, of which 18% (818 lots) is located in Bairnsdale, 733 lots in Lucknow and 459 lots in Lakes Entrance. Table 2 identifies the lot yield and estimated development timing of zoned broadhectare/major infill lot stock.

Table 2: Anticipated Lot Construction Activity – Broadhectare/Major Infill, March 2013

SLA/LGA	1-2 years	3-5 years	6-10 years	11+ years	No Timing[1]	Total Zoned Stocks	Future (unzoned)	Total Lots (zoned/un-zoned)
E. Gippsland (S) - Bairnsdale	595	634	281	200	978	**2,688**	3,040	**5,728**
E. Gippsland (S) - Orbost	37	10	0	0	151	**198**	200	**398**
E. Gippsland (S) - South-West	135	360	130	730	102	**1,457**	**0**	**1,457**
East Gippsland (S)	**767**	**1,004**	**411**	**930**	**1231**	**4,343**	**3,240**	**7,583**

1: *The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 354 lots per annum will be constructed within existing zoned broadhectare/major infill areas. This activity is primarily anticipated to be in Bairnsdale (69 lots per annum) and the remainder in:

- Forge Creek/Paynesville (50 lots per annum);
- Eagle Point (38 lots per annum);
- Paynesville (38 lots per annum);
- Lakes Entrance (34 lots per annum); and
- Lucknow (30 lots per annum).

In addition, there is a total broadhectare lot potential of 1,231 with no anticipated development timing allocated. This supply is mainly located in Metung (386 lots), Lucknow (151 lots) and Eagle Point (150 lots).

NO YIELD

A total 137 hectares (55 lots) of zoned vacant land over one hectare in size has been identified that has the potential for broadhectare style subdivision. However, these parcels are typically in low demand areas, zoned Township (TZ), strategic assessments have not been completed and in many instances un-sewered. Such stock is located in:

- Buchan – 42 hectares;
- East Bairnsdale – 14 hectares; and
- Reedy Flat – 9 hectares

This potential residential land supply source has deliberately been excluded from a lot yield and timing perspective as it is considered unlikely that any significant volume of subdivision activity will occur within the sites.

5.3 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 East Gippsland Shire 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 Shire of East Gippsland, there is an estimated lot potential within Future Residential areas of approximately 3,240. Of this lot potential:

- 1,120 lots are located in Lakes Entrance;
- 850 lots in Paynesville/Forge Creek*;
- 680 in Eagle Point;
- 390 in Lucknow; and
- 200 in Lake Tyers Beach.

* Note that although this land falls within the 'State Suburb Code' of Forge Creek as classified by the Australian Bureau of Statistics, it is located on the western edge of Paynesville settlement.

5.4 RURAL RESIDENTIAL ALLOTMENTS

The stock of both occupied and vacant rural residential allotments have been determined on a lot by lot basis as at March 2013. A Rural 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 and municipal valuation data. Rural residential supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments. It does not assess the development capacity of existing zoned lots developed with a single dwelling or the development potential of vacant lots.

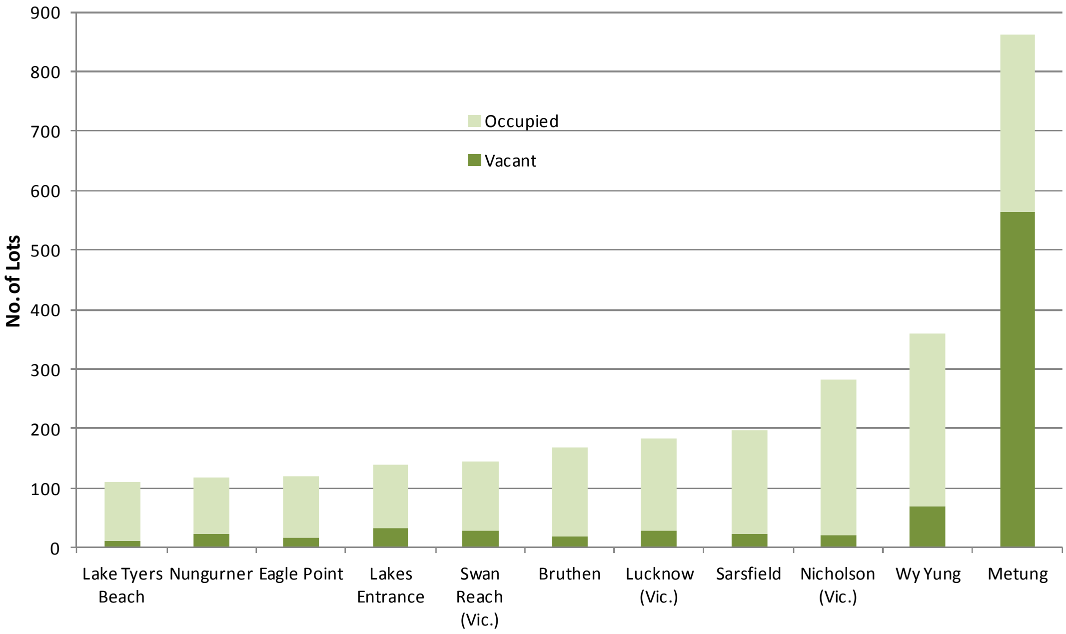
As at March 2013 across the Shire of East Gippsland there was a total lot stock of rural residential allotments of 3,932. Of this stock, 1,103 lots were vacant, a lot vacancy rate of 28%. Graph 6 summarises the stock of both occupied and vacant rural residential allotments by suburb.

By zone type, as at March 2013 there were 2,288 Low Density Residential (LDRZ) allotments, of which 834 were vacant across the municipality, a lot vacancy of 36%. In comparison, there were a total of 1,644 Rural Living (RLZ) zoned allotments, of which 269 were vacant – a lot vacancy rate of 16%.

The location of the majority of non-urban lots across the municipality includes:

- Metung - total 861 lots (lot vacancy of 66%);
- Wy Yung - total 360 lots (lot vacancy of 19%);
- Nicholson - total 281 lots (lot vacancy of 7%);
- Sarsfield - total 198 lots (lot vacancy of 12%); and
- Lucknow - total 182 lots (lot vacancy of 16%).

Graph 6: Stock of Vacant and Occupied 'rural residential' Allotments, 2013



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

There are no identified future (unzoned) rural residential land stocks across the municipality.

In total, there is a residential lot supply of approximately 8,686. This is comprised of:

- *4,343 zoned broadhectare/major infill lots (50% of supply);*
- *1,103 vacant rural residential lots (13% of supply); and*
- *3,240 designated future residential lots (37% of supply).*

As at March 2013, there was 1,887 minor infill lots identified. Of these lots, 312 were sized greater than 2,000sqm or 16% of the identified lots. In addition there were:

- *341 vacant lots sized between 1,200 to 2,000sqm;*
- *685 lots sized from 800 to 1,200sqm; and*
- *478 lots sized from 500 to 800sqm.*

As at March 2013, there was a zoned residential lot capacity within broadhectare/major infill areas of approximately 4,343, of which 18% (818 lots) is located in Bairnsdale, 733 lots in Lucknow and 459 lots in Lakes Entrance.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 354 lots per annum will be constructed within existing zoned broadhectare/major infill areas.

There is an estimated lot potential within Future Residential areas of approximately 3,240. Of this lot potential:

- *850 lots in Paynesville/Forge Creek;*
- *680 in Eagle Point;*
- *390 in Lucknow; and*
- *200 in Lake Tyers Beach.*

As at March 2013 there were 2,288 Low Density Residential (LDRZ) allotments, of which 834 were vacant across the municipality, a lot vacancy of 36%. In comparison, there were a total of 1,644 Rural Living (RLZ) zoned allotments, of which 269 were vacant – a lot vacancy rate of 16%.

6.0 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 published population and household projections contained in Victoria in Future 2012 (VIF2012) undertaken by the Department of Planning and Community Development as the basis for projected dwelling requirements

Victoria in Future 2012 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 2012* 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.

Graph 7 summarises the projected demand for residential dwellings for the Shire of East Gippsland. In addition, it highlights historic 'expressed' demand for residential dwellings in the form of residential building approvals and lot construction.

Projected dwelling requirements sourced from VIF 2012 indicate that from 2011 to 2031 there will be a total dwelling requirement of 10,139 (507 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 407;
- 2016 to 2021 - 511;
- 2021 to 2026 - 549 and
- 2026 to 2031 - 560.

As measured from 2011 to 2031, the average annual projected demand by SLA within the Shire of East Gippsland is:

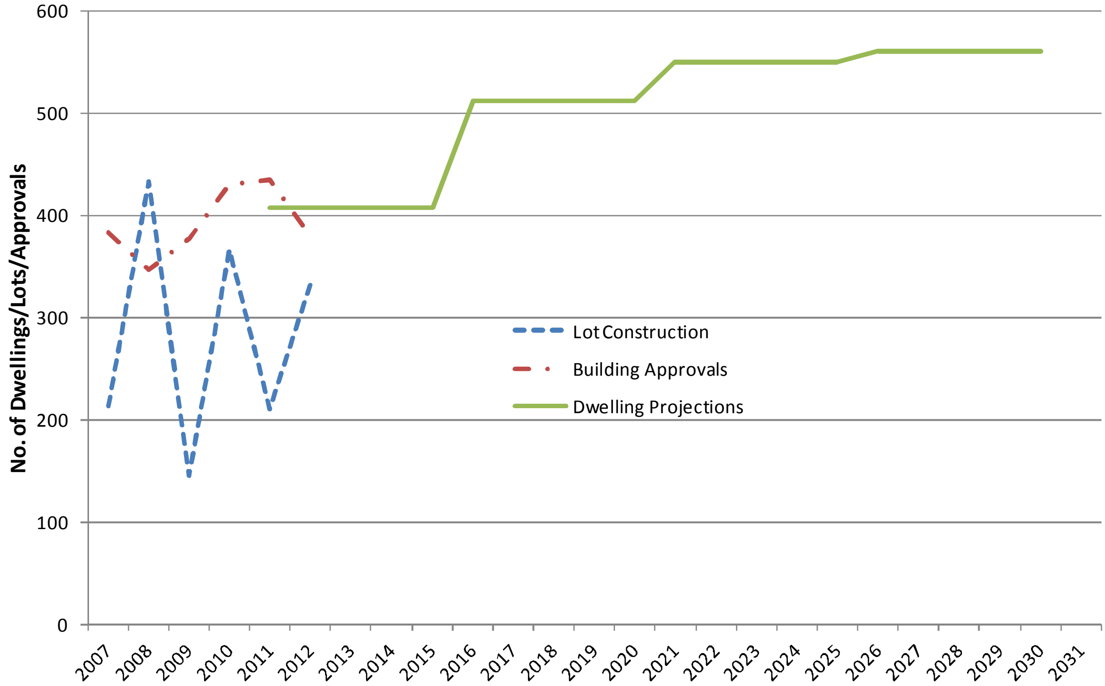
- Bairnsdale: 393 dwellings per annum (e.g. Bairnsdale (part), Paynesville, Lakes Entrance);
- Orbost: 52 dwellings per annum (e.g. Orbost, Mallacoota, Lake Tyers Beach);
- South-West: 47 dwellings per annum (e.g. Bairnsdale (part), Lucknow, Lindenow); and
- Balance: 14 dwellings per annum (e.g. Swifts Creek, Omeo).

An alternative demand projection has been developed that is based on recent (2006 to 2012) building approval activity – a measure of expressed demand, in conjunction with growth rates identified in the State Governments' projections. In summary, utilising this growth rate scenario results in average dwelling requirements of:

- 2011 to 2016 - 390;
- 2016 to 2021 - 487;
- 2021 to 2026 - 521 and
- 2026 to 2031 - 531.

This growth scenario results in a 5% (494 dwellings) decrease in total dwelling requirements from 2011 to 2031.

Graph 7: Historic and Projected Demand for Residential Dwellings, 2006 to 2031



Source: *(former) Department of Planning and Community Development Victoria in Future 2012*
Australian Bureau of Statistics, Catalogue No.8731.0
Spatial Economics Pty Ltd

Projected dwelling requirements sourced from VIF 2012 indicate that from 2011 to 2031 there will be a total dwelling requirement of 10,139 (507 average per annum). The average annual projected demand by SLA within the municipality of East Gippsland is:

- *Bairnsdale: 393 dwellings per annum (e.g. Bairnsdale, Paynesville, Lakes Entrance);*
- *Orbost: 52 dwellings per annum (e.g. Orbost, Mallacoota, Lake Tyers Beach);*
- *South-West: 47 dwellings per annum (e.g. Lindenow,); and*
- *Balance: 14 dwellings per annum (e.g. Swifts Creek, Omeo).*

7.0 YEARS OF SUPPLY – RESIDENTIAL LAND

Analysis has been undertaken to estimate the years of residential land supply by Statistical Local Area. In estimating the years of residential land supply only major infill, zoned broadhectare and future residential land supply types are considered. In assessing the estimated years of supply, the demand component for the above supply types are estimated via the assessment of historic consumption.

The Population and Household Projections 2011-2031 for Victoria, outlined in *Victoria in Future 2012*, are used by the Regional Urban Development Program as the basis for determining projected demand for residential allotments. Demand information is assessed at a municipal level, by the component Statistical Local Areas (SLAs) and selected urban centres. An alternative demand scenario is presented based on historic building approval activity.

Based on historic (July 2006 to June 2012) lot construction activity it is estimated that within the:

- East Gippsland - Bairnsdale SLA 60% of dwelling requirements were for broadhectare/major infill allotments,
    - Bairnsdale – 76%
    - Lakes Entrance – 57%
    - Paynesville/Eagle Point – 57%
- 18% within the East Gippsland – Orbost SLA;
    - Mallacoota – 15%
    - Orbost - 0%
- 0% within the East Gippsland – South West SLA; and
- 0% within the East Gippsland – Balance SLA.

Table 3 summarises the estimated years of supply by demand scenario for major infill and broadhectare stocks combined.

YEARS OF SUPPLY – *VICTORIA IN FUTURE 2012* DEMAND SCENARIO

In terms of zoned broadhectare and major infill residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA and selected urban centre is sufficient to satisfy:

- East Gippsland - Bairnsdale, 15+ years of demand;
    - Bairnsdale – 12 years
    - Lakes Entrance – 14 years

    - Paynesville/Eagle Point – 15+ years
- East Gippsland – Orbost, 15+ years of demand; and
    - Mallacoota – 8 years
    - Orbost – n.a.
- East Gippsland – South West, 15+ years of demand.

In terms of future residential land supply stocks, there is sufficient land to satisfy **13 years** of projected demand. Future residential land stocks by SLA and selected urban centre is sufficient to satisfy:

- East Gippsland - Bairnsdale, 12 years of demand; and
    - Bairnsdale – 3 years
    - Lakes Entrance – over 15+ years
    - Paynesville/Eagle Point – over 15+ years
- East Gippsland – Orbost, 15+ years of demand;
    - Mallacoota – n.a.
    - Orbost – n.a.

YEARS OF SUPPLY – HISTORIC TREND BASED DEMAND SCENARIO

In terms of zoned broadhectare/major infill residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy 15+ years of future demand. In regard to future (unzoned) residential land stocks, there is sufficient land to meet 13 years of future demand.

Table 3: Estimated Years of Residential Broadhectare and Major Infill Land Supply, March 2013

SLA/Urban Area/LGA	VIF2012 Demand Projections			Trend Demand Projections		
	Total Zoned Stocks	**Future (unzoned)**	**Total Lots (zoned/un-zoned)**	**Total Zoned Stocks**	**Future (unzoned)**	**Total Lots (zoned/un-zoned)**
E. Gippsland (S) - Bairnsdale	***15+***	***12***	***15+***	***15+***	***13***	***15+***
Bairnsdale	12	3	**15**	14	3	**17**
Lakes Entrance	14	15+	**15+**	15+	15+	**15+**
Paynesville/Eagle Point	15+	15+	**15+**	15+	15+	**15+**
E. Gippsland (S) - Orbost	***15+***	***15+***	***15+***	***15***	***15***	***15+***
Mallacoota	8	0	**8**	6	0	**6**
Orbost	n.a.	n.a.	**n.a.**	n.a.	n.a.	**n.a.**
E. Gippsland (S) - South-West	*15+*	*0*	***15+***	*15+*	*0*	***15+***
E. Gippsland (S) Bal	*n.a.*	*n.a.*	***n.a.***	***n.a.***	***n.a.***	***n.a.***
E. Gippsland LGA	**15+**	**13**	**15+**	**15+**	**13**	**15+**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

8.0 RESIDENTIAL TABLES

Table 4: Minor Infill Lot Construction Activity, July 2006 to June 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	Average Lot Production
E. Gippsland (S) - Bairnsdale	***78***	***49***	***21***	***88***	***51***	***51***	***56***
Bairnsdale	12	17	6	10	15	14	**12**
Eagle Point	1	0	1	8	0	1	**2**
East Bairnsdale	0	0	0	0	1	7	**1**
Eastwood (Vic.)	4	0	1	10	3	4	**4**
Johnsonville	0	4	0	0	0	0	**1**
Kalimna	6	5	0	3	2	2	**3**
Lake Bunga	0	3	0	0	0	2	**1**
Lakes Entrance	15	10	7	26	6	10	**12**
Lucknow (Vic.)	3	0	0	5	5	2	**3**
Metung	12	2	0	10	0	2	**4**
Paynesville (Vic.)	14	6	2	13	15	4	**9**
Raymond Island	10	0	1	2	2	0	**3**
Swan Reach (Vic.)	1	0	0	0	0	0	**0**
Wy Yung	0	2	3	1	2	3	**2**
E. Gippsland (S) - Orbost	***22***	***19***	***24***	***26***	***24***	***6***	***20***
Bemm River	6	0	0	2	0	0	**1**
Bendoc	0	0	0	0	3	0	**1**
Buchan	0	1	0	1	2	0	**1**
Cann River	1	1	3	0	0	1	**1**
Lake Tyers Beach	5	2	8	3	3	0	**4**
Mallacoota	4	4	3	6	11	3	**5**
Marlo	2	2	7	5	0	0	**3**
Nowa Nowa	0	1	2	3	0	0	**1**
Orbost	2	8	0	6	5	2	**4**
Swan Reach (Vic.)	2	0	1	0	0	0	**1**
E. Gippsland (S) - South-West	***0***	0	***1***	***6***	***0***	***1***	***1***
Lindenow	0	0	0	5	0	1	**1**
Lindenow South	0	0	1	1	0	0	**0**
E. Gippsland (S) Bal	***4***	***10***	***3***	***8***	***4***	***3***	***5***
Benambra	0	0	1	4	0	3	**1**
Bruthen	0	5	1	1	0	0	**1**
Omeo	3	5	0	2	4	0	**2**
Reedy Flat	1	0	0	1	0	0	**0**
Swifts Creek	0	0	1	0	0	0	**0**
East Gippsland LGA	**104**	**78**	**49**	**128**	**79**	**61**	**83**

Source: *Spatial Economics Pty Ltd and Department of Planning and Community Development 2013*

Table 5: Parent Lot Size of Minor Infill Lot Construction, July 2006 to June 2012

SLA/Suburb/LGA	Less than 500 sqm	500 to 800 sqm	800 to 1,200 sqm	1,200 to 2,000 sqm	2,000 to 5,000 sqm	5,000 to 10,000 sqm	10,000 + sqm
E. Gippsland (S) - Bairnsdale	***0***	***19***	***79***	***87***	***70***	***39***	***44***
Bairnsdale	0	8	37	16	9	4	0
Eagle Point	0	1	0	3	0	0	7
East Bairnsdale	0	0	3	0	5	0	0
Eastwood (Vic.)	0	0	8	2	3	0	9
Johnsonville	0	0	0	0	2	2	0
Kalimna	0	0	0	9	6	3	0
Lake Bunga	0	0	0	0	0	2	3
Lakes Entrance	0	8	7	30	10	10	9
Lucknow (Vic.)	0	0	5	2	3	0	5
Metung	0	1	2	8	9	0	6
Paynesville (Vic.)	0	0	15	11	12	11	5
Raymond Island	0	1	1	5	3	5	0
Swan Reach (Vic.)	0	0	0	1	0	0	0
Wy Yung	0	0	1	0	8	2	0
E. Gippsland (S) - Orbost	***0***	***2***	***14***	***22***	***39***	***17***	***27***
Bemm River	0	0	0	0	6	2	0
Bendoc	0	0	0	0	0	3	0
Buchan	0	0	0	0	2	1	1
Cann River	0	0	0	1	3	0	2
Lake Tyers Beach	0	2	7	3	1	6	2
Mallacoota	0	0	2	4	11	0	14
Marlo	0	0	5	6	1	0	4
Nowa Nowa	0	0	0	0	1	3	2
Orbost	0	0	0	8	14	1	0
Swan Reach (Vic.)	0	0	0	0		1	2
E. Gippsland (S) - South-West	***0***	0	0	0	***4***	***4***	***0***
Lindenow	0	0	0	0	2	4	0
Lindenow South	0	0	0	0	2	0	0
E. Gippsland (S) Bal	***0***	0	***1***	***2***	***9***	***14***	***6***
Benambra	0	0	0	0	0	3	5
Bruthen	0	0	0	0	6	0	1
Omeo	0	0	0	2	1	11	0
Reedy Flat	0	0	1	0	1	0	0
Swifts Creek	0	0	0	0	1	0	0
East Gippsland LGA	**0**	**21**	**94**	**111**	**122**	**74**	**77**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 6: Broadhectare/Major Lot Construction Activity, July 2006 to June 2012

SLA/Suburb/LGA	2006- 07	2007- 08	2008- 09	2009- 10	2010- 11	2011- 12
E. Gippsland (S) - Bairnsdale	***64***	***252***	***28***	***122***	***53***	***258***
Bairnsdale	19	0	0	0	0	0
East Bairnsdale	0	0	0	0	0	16
Eastwood (Vic.)	28	75	28	106	32	135
Forge Creek	0	0	0	0	0	90
Johnsonville	0	0	0	0	11	0
Kalimna	0	23	0	16	0	0
Lake Bunga	0	28	0	0	0	0
Lakes Entrance	0	44	0	0	0	17
Lucknow (Vic.)	0	12	0	0	0	0
Paynesville (Vic.)	0	44	0	0	10	0
Raymond Island	17	0	0	0	0	0
Wy Yung	0	26	0	0	0	0
E. Gippsland (S) - Orbost	***10***	***16***	***0***	***13***	***0***	***0***
Lake Tyers Beach	0	16	0	0	0	0
Mallacoota	0	0	0	13	0	0
Marlo	10	0	0	0	0	0
East Gippsland LGA	**74**	**268**	**28**	**135**	**53**	**258**

Note: *Broadhectare/Major lot construction refers to residential projects yielding 10 or more lots.*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 7: Low Density Residential Lot Construction Activity, July 2006 to June 2012

SLA/Suburb/LGA	2006- 07	2007- 08	2008- 09	2009- 10	2010- 11	2011- 12
E. Gippsland (S) - Bairnsdale	***19***	***30***	***2***	***49***	***55***	***5***
Eagle Point	0	0	0	4	7	1
Forge Creek	1	2	0	21	1	2
Johnsonville	0	0	1	0	0	0
Kalimna	1	0	0	0	0	0
Metung	5	22	0	17	44	2
Nicholson (Vic.)	0	5	0	0	3	0
Nungurner	0	1	0	6	0	0
Sarsfield	10	0	0	0	0	0
Wy Yung	2	0	1	1	0	0
E. Gippsland (S) - Orbost	***0***	***29***	***0***	***2***	***0***	***1***
Lake Tyers Beach	0	2	0	2	0	0
Mallacoota	0	27	0	0	0	0
Marlo	0	0	0	0	0	1
E. Gippsland (S) - South-West	***2***	***10***	***6***	***26***	***1***	***4***
Dargo	0	0	0	0	0	2
Lindenow	0	7	0	0	0	0
Lindenow South	0	0	0	15	0	1
Mount Taylor	0	3	1	0	0	0
Sarsfield	2	0	3	0	1	0
Wy Yung	0	0	2	11	0	1
E. Gippsland (S) Bal	***0***	***2***	***0***	***1***	***0***	***0***
Mossiface	0	0	0	1	0	0
Omeo	0	2	0	0	0	0
East Gippsland LGA	**21**	**71**	**8**	**78**	**56**	**10**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 8: Rural Living Lot Construction Activity, July 2006 to June 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
E. Gippsland (S) - Bairnsdale	***3***	***1***	***14***	***3***	***6***	***2***
Bairnsdale	0	1	0	0	0	0
East Bairnsdale	0	0	1	0	0	0
Forge Creek	2	0	0	1	0	2
Metung	0	0	0	0	5	0
Nicholson (Vic.)	0	0	2	2	1	0
Sarsfield	1	0	0	0	0	0
Wy Yung	0	0	11	0	0	0
E. Gippsland (S) - Orbost	***4***	***2***	***13***	***19***	***2***	***0***
Genoa	0	0	13	0	0	0
Lakes Entrance	4	1	0	6	2	0
Newmerella	0	1	0	0	0	0
Swan Reach (Vic.)	0	0	0	13	0	0
E. Gippsland (S) - South-West	***4***	***8***	***33***	***1***	***14***	***1***
Granite Rock	0	4	0	0	0	0
Lindenow South	0	0	0	0	0	1
Lucknow (Vic.)	0	3	4	1	0	0
Sarsfield	0	0	0	0	2	0
Wy Yung	4	1	29	0	12	0
E. Gippsland (S) Bal	***3***	***5***	***0***	***2***	***0***	***0***
Mossiface	1	4	0	0	0	0
Omeo	2	1	0	2	0	0
East Gippsland LGA	**14**	**16**	**60**	**25**	**22**	**3**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 9: Minor Infill (vacant lots) Supply by Lot Size Cohort, March 2013

SLA/Suburb/LGA	Less than 500sqm	500 to 800sqm	800 to 1,200sqm	1,200 to 2,000sqm	2,000 to 5,000sqm	5,000 to 10,000sqm	10,000 sqm+
E. Gippsland (S) - Bairnsdale	***51***	***352***	***481***	***220***	***130***	***29***	***7***
Bairnsdale	3	13	31	16	5	0	1
Eagle Point	5	3	11	6	3	1	0
East Bairnsdale	0	3	8	3	5	0	0
Eastwood (Vic.)	0	31	63	28	20	3	0
Johnsonville	0	0	10	1	2	0	0
Kalimna	2	31	18	11	18	2	0
Lake Bunga	0	8	17	2	7	1	0
Lakes Entrance	6	111	103	30	25	11	4
Lucknow (Vic.)	3	8	2	0	1	0	0
Metung	5	13	37	29	17	0	1
Newlands Arm	0	53	53	32	9	2	0
Nicholson (Vic.)	0	1	2	0	1	2	1
Paynesville (Vic.)	23	56	98	36	6	1	0
Raymond Island	4	19	13	1	0	0	0
Swan Reach (Vic.)	0	0	1	14	3	4	0
Wy Yung	0	2	14	11	8	2	0
E. Gippsland (S) - Orbost	***8***	***102***	***161***	***75***	***72***	***24***	***11***
Bemm River	0	0	8	10	10	0	0
Bendoc	0	0	3	7	6	3	0
Buchan	0	1	3	2	5	1	3
Cann River	0	1	9	3	6	6	2
Genoa	0	0	0	0	3	0	0
Lake Tyers Beach	4	52	30	1	1	2	1
Mallacoota	2	37	77	30	11	6	2
Marlo	1	5	5	9	3	0	0
Nowa Nowa	1	0	1	2	14	4	2
Orbost	0	5	17	6	9	1	1
Swan Reach (Vic.)	0	1	8	5	4	1	0
E. Gippsland (S) - South-West	***0***	***1***	***10***	***4***	***2***	***0***	***1***
Lindenow	0	1	8	1	2	0	0
Lindenow South	0	0	2	3	0	0	0
Walpa	0	0	0	0	0	0	1
E. Gippsland (S) Bal	***12***	***23***	***33***	***42***	***26***	***10***	***0***
Benambra	0	16	19	25	7	0	0
Bruthen	5	2	2	1	5	6	0
Omeo	7	5	11	15	14	4	0
Reedy Flat	0	0	0	1	0	0	0
Swifts Creek	0	0	1	0	0	0	0
East Gippsland LGA	**71**	**478**	**685**	**341**	**230**	**63**	**19**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 10: Broadhectare/Major Infill Lot Potential and Anticipated Development Timing (lots), March 2013

SLA/Suburb/LGA	1-2 years	3-5 years	6-10 years	11+ years	No Timing[1]	Total Zoned Stocks	Future (unzoned)	Total Lots (zoned/ un-zoned)
E. Gippsland (S) - Bairnsdale	***595***	***634***	***281***	***200***	***978***	***2,688***	***3,040***	***5,728***
Bairnsdale	0	20	0	0	0	**20**	**0**	**20**
Eagle Point	189	0	35	0	150	**374**	680	**1,054**
East Bairnsdale	20	18	116	0	98	**252**	**0**	**252**
Eastwood (Vic.)	114	38	0	0	0	**152**	**0**	**152**
Forge Creek/Paynesville	60	190	100	0	0	**350**	850	**1,200**
Johnsonville	0	0	0	0	16	**16**	**0**	**16**
Kalimna	0	0	0	0	25	**25**	**0**	**25**
Lake Bunga	57	70	0	0	2	**129**	**0**	**129**
Lakes Entrance	51	120	0	200	88	**459**	1,120	**1,579**
Lucknow (Vic.)	0	25	0	0	151	**176**	390	**566**
Metung	20	0	0	0	386	**406**	**0**	**406**
Paynesville (Vic.)	75	113	0	0	62	**250**	**0**	**250**
Swan Reach (Vic.)	9	40	30	0	0	**79**	**0**	**79**
Wy Yung	0	0	0	0	0	**0**	0	**0**
E. Gippsland (S) - Orbost	***37***	***10***	***0***	0	***151***	***198***	***200***	***398***
Buchan	8	0	0	0	0	**8**	**0**	**8**
Lake Tyers Beach	0	0	0	0	48	**48**	200	**248**
Mallacoota	18	10	0	0	0	**28**	**0**	**28**
Marlo	11	0	0	0	95	**106**	**0**	**106**
Swan Reach (Vic.)	0	0	0	0	8	**8**	0	**8**
E. Gippsland (S) - South-West	***135***	***360***	***130***	***730***	***102***	***1,457***	***0***	***1,457***
Bairnsdale	73	270	45	410	0	**798**	**0**	**798**
Lindenow	0	0	0	0	44	**44**	**0**	**44**
Lindenow South	0	0	0	0	58	**58**	**0**	**58**
Lucknow (Vic.)	62	90	85	320	0	**557**	**0**	**557**
East Gippsland LGA	**767**	**1004**	**411**	**930**	**1231**	**4,343**	**3,240**	**7,583**

1: *The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.*

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 11: Broadhectare/Major Infill Stocks – No Timing or Yield, March 2013

SLA/Suburb/LGA	Area (ha)	No. of Lots
E. Gippsland (S) - Bairnsdale	***43.12***	***19***
Bairnsdale	1.03	1
East Bairnsdale	14.22	7
Eastwood (Vic.)	3.92	3
Johnsonville	6.63	1
Lake Bunga	7.18	2
Swan Reach (Vic.)	7.18	3
Wy Yung	2.96	2
E. Gippsland (S) - Orbost	***71.63***	***24***
Bendoc	6.07	3
Buchan	41.74	11
Cann River	1.32	1
Mallacoota	7.19	5
Nowa Nowa	6.66	1
Orbost	3.19	2
Swan Reach (Vic.)	5.46	1
E. Gippsland (S) Bal	***22.59***	***12***
Benambra	5.91	1
Omeo	4.17	3
Reedy Flat	8.86	7
Swifts Creek	3.65	1
East Gippsland LGA	**137.34**	**55**

Note: *The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential yield and development timing. This potential is primarily is located in low demand areas where there has been historically minimal to no subdivision activity.*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 12: Occupied and Vacant Rural Residential Lot Stock by Zone Type, March 2013

	LDRZ				RLZ			
SLA/Suburb/LGA	Vacant	Occupied	Vacancy Rate (%)	Total Lots	Vacant	Occupied	Vacancy Rate (%)	Total Lots
E. Gippsland (S) - Bairnsdale	***701***	***803***	***47%***	***1,504***	***73***	***550***	***12%***	***623***
Bairnsdale	0	0	0%	**0**	2	8	20%	**10**
Boole Poole	0	1	0%	**1**	0	1	0%	**1**
Eagle Point	16	80	17%	**96**	0	25	0%	**25**
East Bairnsdale	0	0	0%	**0**	5	29	15%	**34**
Eastwood (Vic.)	1	3	25%	**4**	0	1	0%	**1**
Forge Creek	35	21	63%	**56**	2	39	5%	**41**
Johnsonville	4	6	40%	**10**	3	26	10%	**29**
Kalimna	1	18	5%	**19**	0	0	0%	**0**
Lake Bunga	1	20	5%	**21**	0	0	0%	**0**
Lucknow (Vic.)	0	0	0%	**0**	5	51	9%	**56**
Metung	558	293	66%	**851**	7	3	70%	**10**
Newlands Arm	17	31	35%	**48**	0	0	0%	**0**
Nicholson (Vic.)	10	79	11%	**89**	11	181	6%	**192**
Nungurner	24	94	20%	**118**	0	0	0%	**0**
Ocean Grange	10	34	23%	**44**	0	0	0%	**0**
Raymond Island	2	4	33%	**6**	14	63	18%	**77**
Sarsfield	7	40	15%	**47**	2	32	6%	**34**
Swan Reach (Vic.)	0	0	0%	**0**	10	14	42%	**24**
Tambo Upper	0	0	0%	**0**	2	54	4%	**56**
Wy Yung	15	79	16%	**94**	10	23	30%	**33**
E. Gippsland (S) - Orbost	***79***	***263***	***23%***	***342***	***78***	***360***	***18%***	***438***
Bete Bolong	0	0	0%	**0**	2	14	13%	**16**
Bruthen	0	9	0%	**9**	4	24	14%	**28**
Genoa	0	0	0%	**0**	13	9	59%	**22**
Lake Tyers Beach	7	56	11%	**63**	3	45	6%	**48**
Lakes Entrance	7	38	16%	**45**	25	68	27%	**93**
Mallacoota	23	25	48%	**48**	9	10	47%	**19**
Marlo	40	56	42%	**96**	0	0	0%	**0**
Newmerella	1	33	3%	**34**	1	21	5%	**22**
Nowa Nowa	0	0	0%	**0**	2	67	3%	**69**
Orbost	1	46	2%	**47**	0	0	0%	**0**
Swan Reach (Vic.)	0	0	0%	**0**	19	102	16%	**121**
E. Gippsland (S) - South-West	***40***	***262***	***13%***	***302***	***65***	***299***	***18%***	***364***
Bairnsdale	0	0	0%	**0**	0	1	0%	**1**
Dargo	8	14	36%	**22**	0	0	0%	**0**
Fernbank	0	24	0%	**24**	0	0	0%	**0**
Granite Rock	0	0	0%	**0**	6	55	10%	**61**

Lindenow	3	57	5%	**60**	0	0	0%	**0**
Lindenow South	11	29	28%	**40**	0	8	0%	**8**
Lucknow (Vic.)	0	0	0%	**0**	24	102	19%	**126**
Mount Taylor	3	47	6%	**50**	0	0	0%	**0**
Sarsfield	7	18	28%	**25**	0	16	0%	**16**
Wy Yung	8	73	10%	**81**	35	117	23%	**152**
E. Gippsland (S) Bal	***14***	***126***	***10%***	***140***	***53***	***166***	***24%***	***219***
Bruthen	2	67	3%	**69**	12	49	20%	**61**
Mossiface	2	30	6%	**32**	9	34	21%	**43**
Omeo	10	13	43%	**23**	25	30	45%	**55**
Sarsfield	0	16	0%	**16**	7	53	12%	**60**
East Gippsland LGA	**834**	**1,454**	**36%**	**2,288**	**269**	**1,375**	**16%**	**1,644**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 13(a): Estimated and Projected Population, 2011 to 2031

SLA/LGA	Estimated Resident Population				
	2011	**2016**	**2021**	**2026**	**2031**
E. Gippsland (S) - Bairnsdale	28,544	30,839	33,693	36,745	39,805
E. Gippsland (S) - Orbost	9,133	9,310	9,545	9,777	10,011
E. Gippsland (S) - South-West	4,276	4,653	5,081	5,541	6,020
E. Gippsland (S) Bal	2,727	2,778	2,830	2,895	2,972
E. Gippsland LGA	**44,680**	**47,581**	**51,149**	**54,958**	**58,808**

Source: *(former) Department of Planning and Community Development Victoria in Future 2012*

Table 13(b): Estimated and Projected Number of Dwellings, 2011 to 2031

SLA/LGA	Structural Private Dwellings				
	2011	**2016**	**2021**	**2026**	**2031**
E. Gippsland (S) - Bairnsdale	14,688	16,245	18,224	20,369	22,555
E. Gippsland (S) - Orbost	5,066	5,305	5,578	5,848	6,113
E. Gippsland (S) - South-West	1,714	1,902	2,133	2,386	2,654
E. Gippsland (S) Bal	1,496	1,549	1,619	1,697	1,781
E. Gippsland LGA	**22,964**	**25,000**	**27,555**	**30,300**	**33,103**

Source: *(former) Department of Planning and Community Development Victoria in Future 2012*

Table 13(c): Projected Average Annual Change in the Number of Persons and Dwellings, 2011 to 2031

SLA/LGA	Estimated Resident Population					Structural Private Dwellings				
	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031
E. Gippsland (S) - Bairnsdale	459	571	610	612	563	311	396	429	437	393
E. Gippsland (S) - Orbost	35	47	46	47	44	48	55	54	53	52
E. Gippsland (S) - South-West	75	86	92	96	87	38	46	51	53	47
E. Gippsland (S) Bal	10	10	13	15	12	10	14	16	17	14
E. Gippsland LGA	**580**	**714**	**762**	**770**	**706**	**407**	**511**	**549**	**560**	**507**

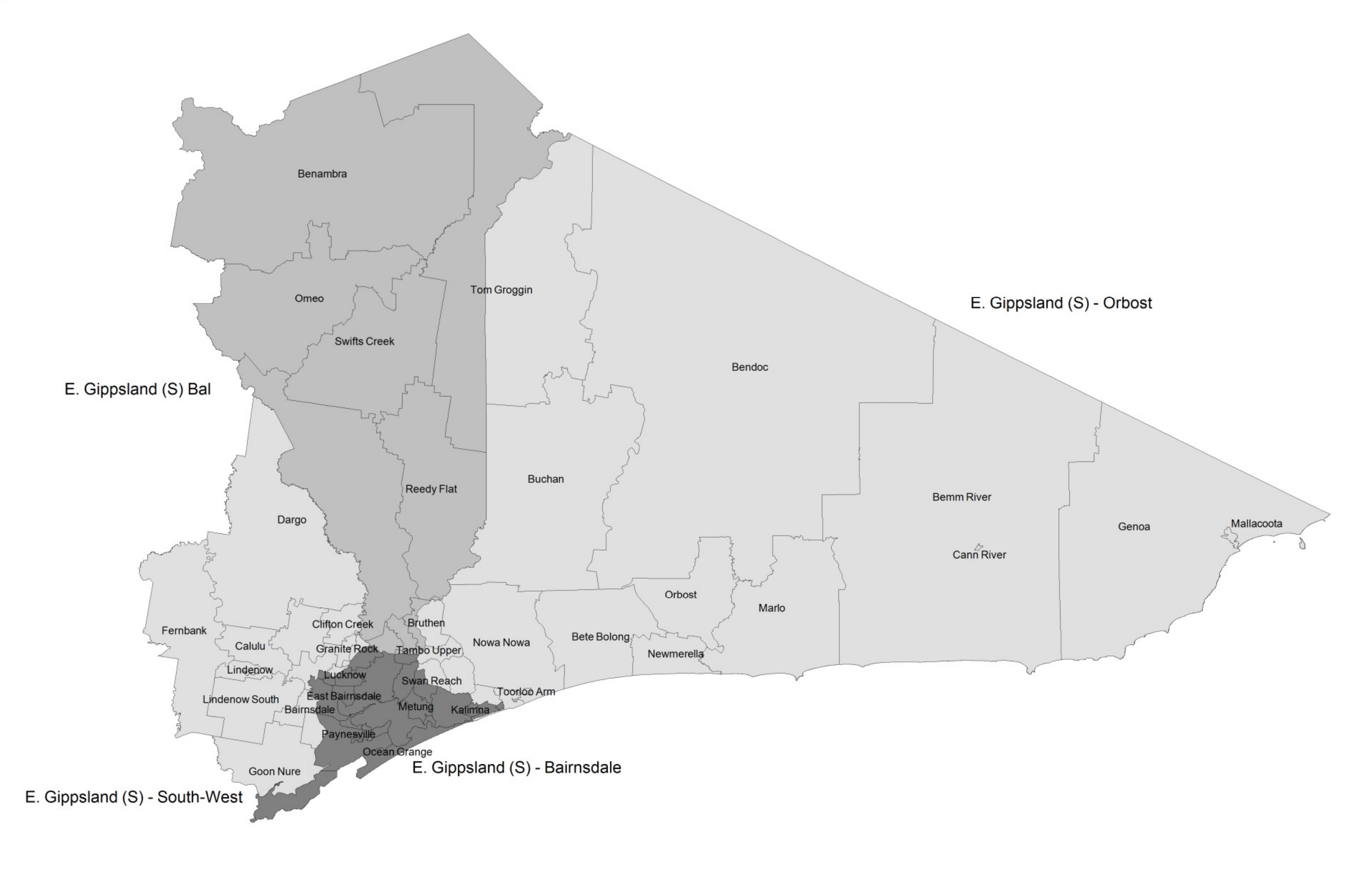
Source: *(former) Department of Planning and Community Development Victoria in Future 2012*

Table 13(d): Projected Average Annual Percentage Change in the Number of Persons and Dwellings, 2011 to 2031

SLA/LGA	Estimated Resident Population					Structural Private Dwellings				
	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031
E. Gippsland (S) - Bairnsdale	1.6%	1.8%	1.7%	1.6%	1.7%	2.0%	2.3%	2.3%	2.1%	2.2%
E. Gippsland (S) - Orbost	0.4%	0.5%	0.5%	0.5%	0.5%	0.9%	1.0%	0.9%	0.9%	0.9%
E. Gippsland (S) - South-West	1.7%	1.8%	1.7%	1.7%	1.7%	2.1%	2.3%	2.3%	2.1%	2.2%
E. Gippsland (S) Bal	0.4%	0.4%	0.5%	0.5%	0.4%	0.7%	0.9%	0.9%	1.0%	0.9%
E. Gippsland LGA	**1.3%**	**1.5%**	**1.4%**	**1.4%**	**1.4%**	**1.7%**	**2.0%**	**1.9%**	**1.8%**	**1.8%**

Source: *(former) Department of Planning and Community Development Victoria in Future 2012*

LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS – EAST GIPPSLAND



GLOSSARY OF TERMS

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.

FUTURE RURAL RESIDENTIAL LAND

Land identified by the relevant municipal authority for future rural residential development and current zoning not supportive of such residential development. This includes both future zone types of Low Density Residential (LDRZ) and Rural Living (RLZ).

LOCAL GOVERNMENT AREA (LGA)

A geographical area that is administered by a local council.

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.

MINOR INFILL

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less one hectare.

RURAL RESIDENTIAL LAND

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

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.

SUBURB (AUSTRALIAN BUREAU OF STATISTICS)

This is a census-specific area where Collection Districts are aggregated to approximate suburbs.

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.