# Urban Development Program

2011

## Regional Residential Report

## Rural City of Horsham

State Government Victoria
Department of Planning and Community Development

## ACKNOWLEDGEMENTS

This Urban Development Program was undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development.

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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. The initial municipalities covered were Ballarat, Greater Bendigo, Latrobe and Wodonga. This round of land supply assessments is for the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. This report provides information on residential supply and demand for the Rural City of Horsham.

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 the Rural City of Horsham.

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

From 2005-06 to 2010-11 residential building approval activity within the Rural City of Horsham has averaged 125 dwellings per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 191 dwellings in 2006-07 and troughed at 84 in 2007-08.

The majority of building approvals (91%) since 2005-06 have been separate houses, 8% semi-detached dwellings and 1% units/apartments.

Total residential lot construction for the period 2005-06 to 2010-11 averaged 105 per annum. The majority (63%) were broadhectare lots, 24% were minor infill, 9% non urban and 5% major infill. The vast majority (83%) of residential lot construction activity was located within the suburb of Horsham.

Lot construction and residential building approval activity as measured from 2005-06 to 2010-11 broadly aligns in terms of the identified volume at 105 and 125 respectively per annum. The 'marginal' imbalance between the two suggests a small component of residential dwelling construction is on vacant lots constructed prior to 2005-06.

## PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 1,453 additional dwellings (or on average 97 per annum) will be required to house the projected population for the Rural City of Horsham.

An alternative demand projection has been developed that is based on recent (2005-06 to 2010-11) building approval activity – a measure of expressed demand, in conjunction with growth rates identified in the State Governments' projections. This demand scenario results in an average annual dwelling requirement of 125 dwellings per annum.

This growth scenario results in a 29% (425 dwellings) increase in total dwelling requirements from 2011 to 2026.

## IDENTIFIED RESIDENTIAL LAND SUPPLY

In total there is a residential lot supply of approximately 1,879. This is comprised of:

- 1,213 zoned broadhectare lots (65% of supply);
- 357 vacant non urban residential lots (19% of supply); and
- 309 designated future residential lots (16% of supply).

All broadhectare lots are located within the urban area of Horsham. It is estimated that over the next five years an average 90 lots per annum will be constructed within existing zoned broadhectare areas. Since 2005-06, an average 66 broadhectare lots per annum were constructed.

Over the 6-10 year period 61 lots per annum are anticipated to be constructed (close to historical averages), leaving a total zoned broadhectare lot capacity of 460.

In total there is approximately 52 hectares of land designated for future residential development. Of this area approximately 24 hectares have been assessed to yield approximately 309 lots.

## YEARS OF RESIDENTIAL LAND SUPPLY

Two projected demand scenarios have been used to assess the number of years' supply of residential land stocks. The outcomes are summarised below:

### *VICTORIA IN FUTURE 2012* DEMAND SCENARIO

Based on this demand scenario there is sufficient broadhectare and major infill zoned stock to satisfy **15+ years** of projected demand across Horsham.

For future (unzoned) land supply stocks (with an associated estimated yield), there is sufficient land to satisfy **3 years** of projected demand.

### HISTORIC TREND BASED 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 **12 years** of future demand.

In terms of future (unzoned) residential land supply stocks (with an associated estimated yield), there is sufficient land to satisfy **2 years** of projected demand.

## MINOR INFILL LOT SUPPLY

In addition, the minor infill lot supply of 378 lots also constitutes around **3 to 3.5 years** of vacant land.

## POTENTIAL LOT CONSTRUCTION ACTIVITY

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 90 lots per annum will be constructed within existing zoned broadhectare and major infill areas.

This rate of anticipated lot construction is 27% greater than the recent average of broadhectare and major infill lot production. Based on anticipated lot construction activity over the next five years 37% of the zoned residential broadhectare and major infill stock will be consumed. This indicates that there is sufficient zoned broadhectare lot stock to meet short to medium term requirements.

**Conclusion and Current Actions**

In summary there is an adequate stock of zoned residential land to meet Victoria in Future and trend based consumption rates across the Rural City of Horsham. Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand.

Based on *Victoria in Future 2012* projections, the Rural City of Horsham currently has in excess of 15 years supply of zoned residential land stocks across the municipality; however, has only 3 years of 'future' or unzoned land stocks.

Horsham Council are currently in the process of preparing a 'Framework for Managing Growth', which seeks to establish a broad vision for the future development of the City.

# 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 2009-10, the Urban Development Program was expanded across key provincial areas across regional Victoria. Initially, this included the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga. The next round of completed land supply assessments include the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura.

In addition, land supply assessments for the following municipalities are near completion, these include: Mount Alexander, Mitchell, Macedon, Moorabool, Baw Baw, Bass Coast, South Gippsland, Moyne, Murrindindi, Colac-Otway and Golden Plains.

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 on the growth and investment in these key areas across regional Victoria.

The industrial and residential land supply assessments for the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development in conjunction with the associated councils.

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 the future.

## 1.3 URBAN DEVELOPMENT PROGRAM REPORTS 2011

The 2011 Urban Development Program Reports for Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura, as well as the 2011 Urban Development Program Report for metropolitan Melbourne, 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 Regional Urban Development Program 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 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 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 where the current zoning is not supportive of 'normal' residential development. Land which has an 'Urban Growth Zone' applied, but where a precinct structure plan has not yet been approved, falls into this category.

**Non Urban:** Land zoned Low Density Residential (LDRZ) or Rural Living (RLZ) or identified for future LDRZ or 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 issue of certificate of title.

Construction activity has been assessed on an annual basis as at July of each year from 2005 to 2011.

## 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 and existing studies such as structure plans and municipal strategic statements.

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 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 five broad time periods, namely:

- 1 to 2 years (2011-12 to 2012-13)
- 3 to 5 years (2013-14 to 2015-16)
- 6 to 10 years (2016-17 to 2020/21)
- 11 years or more (2021 and beyond)
- 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.

## NON URBAN

Non Urban 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) are 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 have been applied:

- Dwelling requirements contained within *Victoria in Future 2012*; and
- Recent residential building approval trends (2005 to 2011).

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 preliminary population projections.

# 3.0 OVERVIEW

The Rural City of Horsham includes the regional centre of Horsham, smaller towns and farming communities.

Horsham is located in western Victoria, around 300 kilometres from Melbourne. It is the main regional centre for the Wimmera. It is located on the Melbourne-Adelaide railway and road corridor and is at the junction of a number of other highways, emphasising the regional importance of the centre.

Horsham's largest employment sectors are retail trade and health, complementing the main regional industry of broadacre agriculture.

The regional economy is heavily reliant on agricultural production, whilst Horsham provides a focus for retail, manufacturing, transport, government and community services for the wider Wimmera area.

The city has a range of educational and health facilities including several secondary colleges and a TAFE/university campus.

This report covers the trends and shifts in building activity across the Rural City of Horsham, and provides an insight into proposed future residential development activity.

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

Urban Horsham is represented by Horsham – Central Statistical Local Area.

# 4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction and dwelling approvals across the Rural City of Horsham. Residential lot construction activity is detailed from 2005-06 to 2010-11 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;
- Major Infill;
- Broadhectare; and
- Non Urban.

## 4.1 RESIDENTIAL BUILDING APPROVALS

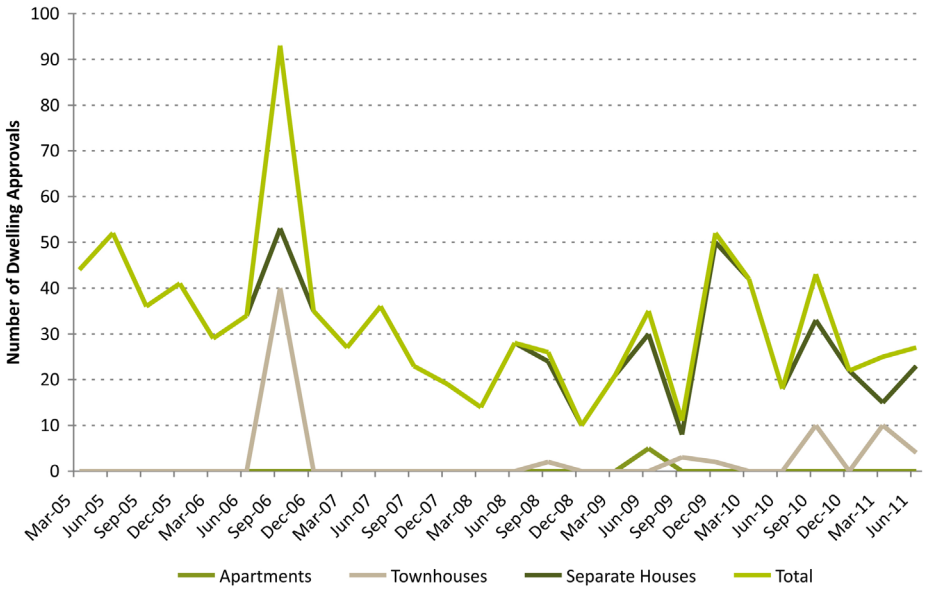
As measured from 2005-06 to 2010-11 residential building approval activity within the Rural City of Horsham has averaged 125 dwellings approved per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 191 dwellings in 2006-07 and troughed at 84 in 2007-08.

Graph 1 illustrates the amount of building approval activity by dwelling type on a quarterly basis for the Rural City of Horsham.

The vast majority of building approvals (91%) since 2005-06 have been separate houses, 8% semi-detached dwellings and 1% units/apartments.

The majority (84% or 105 per annum) of building approval activity since 2005-06 has been located within the Statistical Local Area (SLA) of Horsham – Central, essentially the urban area of Horsham.

***Graph 1: Number of Quarterly Residential Building Approvals by Type, 2005-06 to 2010-11***




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

## 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 2005-06 to 2010-11. Lot construction activity has been classified into distinct supply types and or supply locations as previously defined in this report.

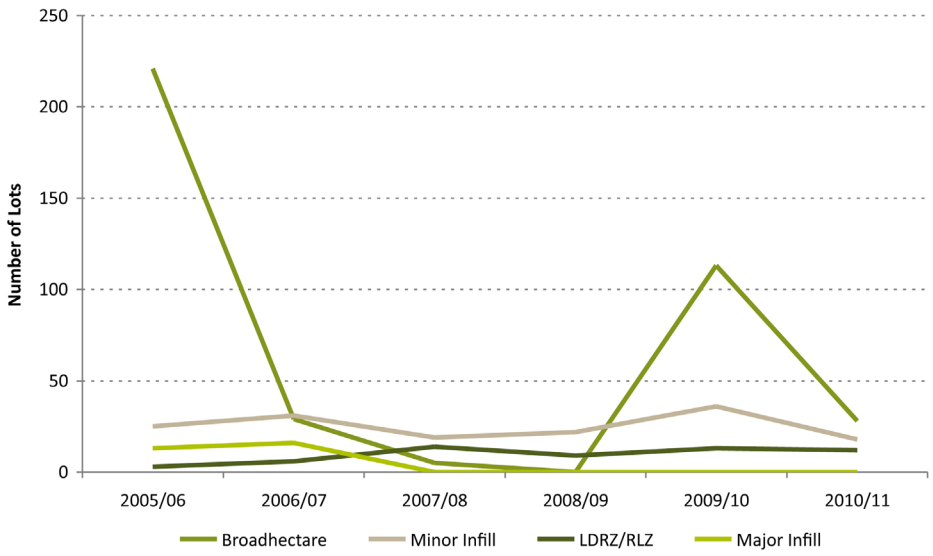
Graph 2 summarises the amount of residential lot construction by supply type for the Rural City of Horsham. From 2005-06 to 2010-11 there was an average annual residential lot construction of 105. The majority (63%) were broadhectare lots, 24% were minor infill, 9% non urban and 5% major infill.

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 31 lots and 'peaked' in 2005-06 at 262 lots. In 2010-11 there were 58 lots constructed. The lot construction variance over-time is a typical trend illustrated from the land development industry and indicates no significant supply or policy issues.

Graph 3 illustrates the average annual volume of all residential lot production by suburb. The vast majority (83%) of residential lot construction activity was located within the suburb of Horsham.

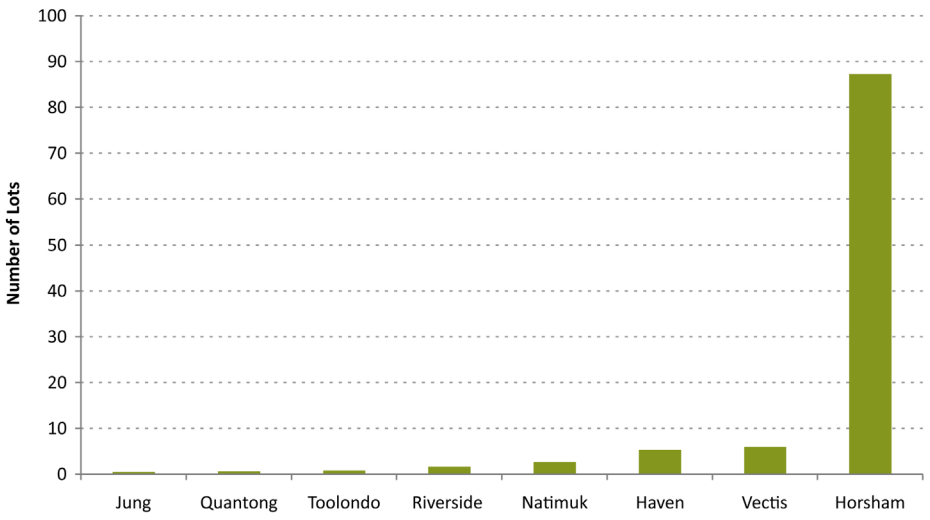
Lot construction and residential building approval activity as measured from 2005-06 to 2010-11 broadly aligns in terms of the identified volume at 105 and 125 respectively per annum. The 'marginal' imbalance between the two suggests a small component of residential dwelling construction is on vacant lots constructed prior to 2005-06.

***Graph 2: Number of Residential Lots Constructed by Supply Type, 2005-06 to 2010-11***




*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Graph 3: Average Annual Number of Residential Lots Constructed by Suburb, 2005-06 to 2010-11***




*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

### 4.2.1 MINOR INFILL LOT CONSTRUCTION

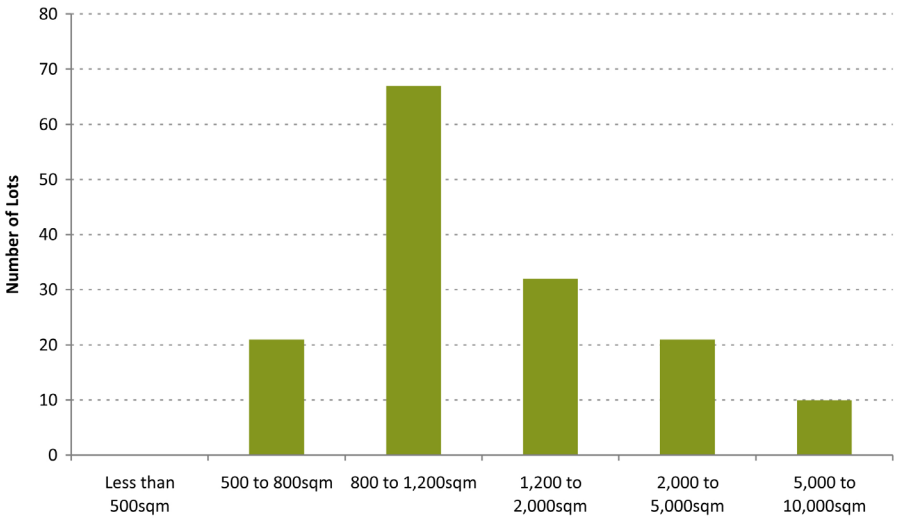
Minor infill lot construction activity as measured from 2005-06 to 2010-11 across the Rural City of Horsham averaged 25 lots per annum. This represents 24% of all residential lot construction activity across the municipality.

Minor infill lot construction activity was concentrated within the established urban area of Horsham. There was negligible minor infill activity within the townships of Natimuk and Toolondo.

As measured annually from 2005-06 to 2010-11, the amount of minor infill lot construction activity has varied. In 2009-10 there were approximately 36 minor infill lots constructed, decreasing to 18 in 2010-11.

Of the 151 minor infill lots constructed 58% were constructed on 'parent' lots sized less than 1,200sqm, there were no lots constructed on 'parent lots less than 500sqm. There were 21 lots constructed (14%) on parent lots sized from 2,000 to 5,000sqm. Graph 4 summarises the volume of minor infill lot construction by 'parent' lot size cohorts.

***Graph 4: Parent Lot Size of Minor Infill Lot Subdivision, 2005-06 to 2010-11***




*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

### 4.2.2 MAJOR INFILL LOT CONSTRUCTION

Major infill lot construction activity as measured from 2005-06 to 2010-11 across the Rural City of Horsham averaged 5 lots per annum. This represents 5% of all residential lot construction activity across the municipality. All major infill lot construction was located within the suburb of Vectis.

There has been no major infill lot construction activity since 2006-07. This is primarily due to no (identified) major infill supply sites.

### 4.2.3 BROADHECTARE LOT CONSTRUCTION

Broadhectare lot construction activity as measured from 2005-06 to 2010-11 across the Rural City of Horsham averaged 66 lots per annum. This represents 63% of all residential lot construction activity across the municipality.

All broadhectare lot construction activity was located within the suburb of Horsham.

As measured annually from 2005-06 to 2010-11, the amount of broadhectare lot construction activity has varied significantly. In 2005-06 there was approximately 221 broadhectare lots constructed, over the next three years only 34 lots were constructed. In 2009-10 there was 113 lots constructed declining to 28 in 2010-11.

### 4.2.4 NON URBAN LOT CONSTRUCTION

Non urban lot construction activity as measured from 2005-06 to 2010-11 across the Rural City of Horsham has averaged approximately 10 lots per annum. This represents 9% of all residential lot construction activity across the municipality.

Of this lot construction activity – 60% was zoned Low Density Residential (LDRZ) the remaining zoned Rural Living (RLZ). The majority of this subdivision activity was located in the suburbs of Haven (37 lots) and Riverside (10 lots).

From 2005-06 to 2010-11 there was an average annual residential lot construction of 105. The majority (63%) were broadhectare lots, 24% were minor infill, 9% non urban, and 5% major infill.

As measured from 2005-06 to 2010-11 residential building approval activity within the Rural City of Horsham has averaged 125 per annum. The vast majority of building approvals (91%) since 2005-06 have been separate houses, 8% semi-detached dwellings and 1% units/apartments.

Analysis of the amount of building approvals and residential lot construction indicates a functioning residential land market within Horsham. Lot construction and residential building approval activity broadly aligns in terms of the identified volume at 105 and 125 respectively per annum. The 'marginal' imbalance between the two suggests a small component of residential dwelling construction is on vacant lots constructed prior to 2005-06.

# 5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the Rural City of Horsham as at July 2011. 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;
- Major Infill;
- Broadhectare;
- Future Residential; and
- Non Urban.

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 potential lot yields, by supply type across the Rural City of Horsham as at July 2011. In total (excluding minor infill) there is a residential lot supply of approximately 1,879. This is comprised of:

- 1,213 zoned broadhectare lots (65% of supply);
- 357 vacant non urban residential lots (19% of supply); and
- 309 designated future residential lots (16% 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, 2011***

| SLA/Suburb/LGA | Broad Hectare | Future Residential (Unzoned) | Major Infill | Non Urban | Total |
|---|---|---|---|---|---|
| **Horsham (RC) – Central** | **1,213** | **309** | **0** | **22** | **1,544** |
| Horsham | **1,213** | 309 | 0 | 22 | **1,544** |
| **Horsham (RC) Bal** | **0** | **0** | **0** | **335** | **335** |
| Dadswells Bridge | **0** | 0 | 0 | 6 | **6** |
| Haven | **0** | 0 | 0 | 95 | **95** |
| Laharum | **0** | 0 | 0 | 3 | **3** |
| Noradjuha | **0** | 0 | 0 | 10 | **10** |
| Quantong | **0** | 0 | 0 | 201 | **201** |
| Riverside | **0** | 0 | 0 | 2 | **2** |
| Toolondo | **0** | 0 | 0 | 15 | **15** |
| Vectis | **0** | 0 | 0 | 3 | **3** |
| **Horsham LGA** | **1,213** | **309** | **0** | **357** | **1,879** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Note: Non-urban supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments.***

## 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 the latest aerial imagery of December 2009/January 2010. 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 compared with anything from five plus dwellings within a larger urban settlement.

As at December 2009, there were 378 minor infill lots identified. Of these lots, 281 were sized less than 1,200sqm or 74% of the identified lots. In addition there were:

- 41 vacant lots sized between 1,200 to 2,000sqm;
- 45 lots sized from 2,000sqm to 5,000sqm; and
- 11 lots sized from 5,000 to 10,000sqm.

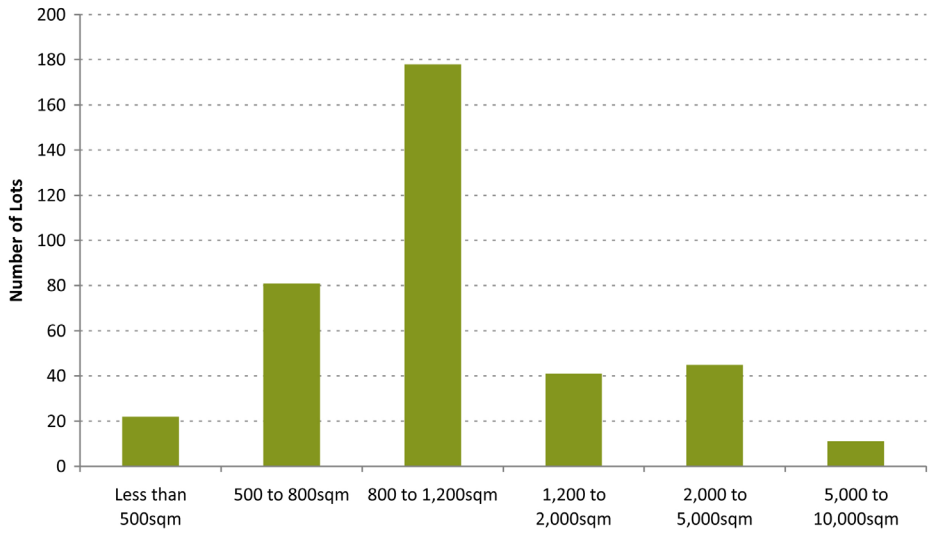
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 24% of lot construction activity across Horsham was minor infill, and of this lot construction, 58% was from parent lots sized 1,200sqm or less.

The majority of minor infill supply is located in :

- Horsham – 318 lots;
- Natimuk – 28 lots;
- Lower Norton – 16 lots; and
- Pimpinio – 12 lots.

***Graph 5: Minor Infill Supply – Number of Vacant Zoned Residential Allotments, by Lot Size Cohort, 2011***




*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

## 5.2 MAJOR INFILL SUPPLY

As at July 2011, there was 9.9 hectares of zoned residential land (vacant) that was comprised of allotments greater than one hectare in size. No development timing or dwelling/lot yield has been applied to these sites due primarily to the lack of 'expressed' historical demand i.e. no recent lot construction activity. Within these locations the potential lot density can be quite diverse, typically achieving one dwelling per hectare. Typically there areas are un-sewered and therefore have limited potential to achieve 'normal' urban densities.

***Table 2: Anticipated Lot Construction Activity – Major Infill, 2011***

| SLA/LGA | Undeveloped No Timing (hectares) |
|---|---|
| **Horsham (RC) – Central** | **9.93** |
| Jung | 1.63 |
| Pimpinio | 2.83 |
| Toolondo | 1.95 |
| Vectis | 3.52 |
| **Horsham LGA** | **9.93** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

## 5.3 BROADHECTARE SUPPLY

As at July 2011, there was a residential lot capacity within broadhectare areas of approximately 1,213, of which all is located in the urban area of Horsham. Broadhectare lot potential represents 65% of the total existing zoned residential land supply across the Rural City of Horsham.

Table 3 identifies the lot yield and estimated development timing of zoned broadhectare lot stock.

***Table 3: Anticipated Lot Construction Activity – Broadhectare, 2011***

| SLA/LGA | Development Timing (lots) | | | | No Timing (hectares) | Total Zoned Lot Potential |
|---|---|---|---|---|---|---|
| | 1-2 years | 3-5 years | 6-10 years | 11+ years | | |
| Horsham (RC) – Central | 162 | 288 | 303 | 460 | 0 | **1,213** |
| Horsham (RC) Bal | 0 | 0 | 0 | 0 | 250 | 0 |
| **Horsham LGA** | **162** | **288** | **303** | **460** | **250** | **1,213** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 90 lots per annum will be constructed within existing zoned broadhectare areas (since 2005-06, on average 66 broadhectare lots per annum were constructed).

Over the 6-10 year period 61 lots per annum are anticipated to be constructed (close to historical averages), leaving a total zoned broadhectare lot capacity of 460.

Additionally, a total of 250 hectares of zoned vacant land over one hectare in size has been identified that has the potential for broadhectare subdivision. However, these parcels are typically in low demand areas, zoned Township (TZ) and in many instances un-sewered. Suburbs that have relatively high levels of this land stock form include:

- Vectis – 138 hectares;
- Toolondo – 48 hectares; and
- Pimpinio – 33 hectares.

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

## 5.4 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 Horsham Rural 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.

Locations which face natural hazards (such as fire, flood and landslide) need to be assessed as part of the decision making associated with a proposed rezoning change.

In total there is approximately 52 hectares of land designated for future residential development. Of this area approximately 24 hectares have been assessed to yield approximately 309 lots.

## 5.5 NON URBAN ALLOTMENTS

The stock of both occupied and vacant non-urban residential allotments have been determined on a lot by lot basis as at December 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.

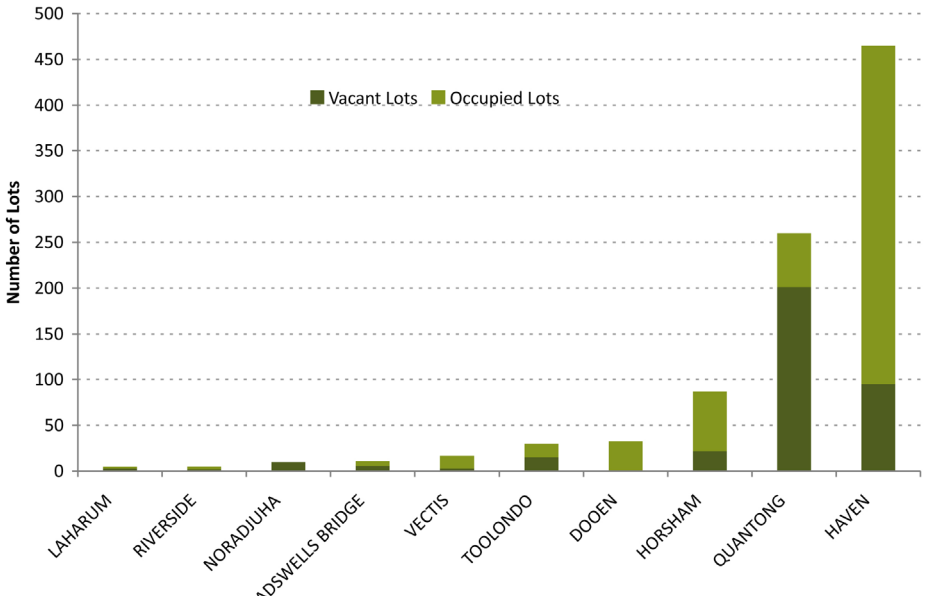
As at December 2009 across the Rural City of Horsham there were a total of 923 non-urban allotments. Of these, 357 lots were vacant, a lot vacancy rate of 39%. Graph 6 summarises the stock of both occupied and vacant non-urban residential allotments by suburb.

By zone type, as at December 2009 there were 317 Low Density Residential (LDRZ) allotments, of which 61 were vacant across the municipality, a lot vacancy of 19%. In comparison, there were a total of 606 Rural Living (RLZ) zoned allotments, of which 296 were vacant – a lot vacancy rate of 49%.

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

- Haven – total 465 lots (lot vacancy of 20%);
- Quantong – total 260 lots (lot vacancy of 77%);
- Horsham – total 87 lots (lot vacancy of 25%);
- Dooen – total 33 lots (lot vacancy of 0%); and
- Toolondo – total 30 lots (lot vacancy of 50%).

***Graph 6: Number of Vacant and Occupied 'non-urban' Allotments, 2009***




*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

In total (excluding minor infill) there is a residential lot supply of approximately 1,879. This is comprised of:

- 1,213 zoned broadhectare lots (65% of supply);
- 357 vacant non urban residential lots (19% of supply); and
- 309 designated future residential lots (16% of supply).

As at December 2009, there were 378 minor infill lots identified. Of these lots, 281 were sized less than 1,200sqm or 74% of the identified lots. Minor infill accounted for 24% of lot construction activity across Horsham, and of this lot construction, 58% was from parent lots sized 1,200sqm or less.

As at July 2011, there was a residential lot capacity within broadhectare areas of approximately 1,213. Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average on average 90 lots per annum will be constructed within existing zoned broadhectare areas (since 2005/06 – 66 broadhectare lots per annum were constructed).

Over the 6-10 year period 61 lots per annum are anticipated to be constructed (close to historical averages), leaving a total zoned broadhectare lot capacity of 460.

In total there is approximately 52 hectares of land designated for future residential development. Of this area approximately 24 hectares have been assessed to yield approximately 309 lots.

As at December 2009 across the Rural City of Horsham there were a total of 923 non-urban allotments. Of these, 357 lots were vacant, a lot vacancy rate of 39%.

# 6.0 PROJECTED DEMAND

This report incorporates the most recently available demand figures to project dwelling requirements and compare with 'years of supply' of residential land. These figures currently use the *Victoria in Future 2012* projections as the basis for demand, which are updated in line with state population and household projections.

*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 Rural City of Horsham. 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 *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 1,453 additional dwellings (or on average 97 per annum) will be required to house the projected population for the Rural City of Horsham.
For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 – 96;
- 2016 to 2021 – 100; and
- 2021 to 2026 – 94.

As measured from 2011 to 2026, the average annual projected demand by SLA within the Rural City of Horsham is:

- Central: 73 dwellings per annum (Horsham); and
- Balance: 23 dwellings per annum (e.g. Haven, Drung and Vectis).

An alternative demand projection has been developed that is based on recent (2005-06 to 2010-11) 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 – 125;
- 2016 to 2021 – 130; and
- 2021 to 2026 – 121.

This growth scenario results in a 29% (425 dwellings) increase in total dwelling requirements from 2011 to 2026.

***Graph 7: Historic and Projected Demand for Residential Dwellings, 2006 to 2026***


*Source: 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 *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 1,453 additional dwellings (or on average 97 per annum) will be required to house the projected population for the Rural City of Horsham. For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 – 96;
- 2016 to 2021 – 100; and
- 2021 to 2026 – 94.

An alternative demand projection has been developed that is based on recent (2005-06 to 2010-11) 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 – 125;
- 2016 to 2021 – 130; and
- 2021 to 2026 – 121.

This growth scenario results in a 29% (425 dwellings) increase in total dwelling requirements from 2011 to 2026.

# 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 both a municipal level and by the component Statistical Local Areas (SLAs). An alternative demand scenario is presented based on historic building approval activity.

Based on historic (July 2005 to July 2011) lot construction activity it is estimated that within the Horsham – Central SLA 77% of dwelling requirements were for broadhectare/major infill allotments. There are no broadhectare or major infill residential land stocks in the Horsham – Balance SLA.

Table 4 summarises the estimated years of supply by demand scenario for major infill and broadhectare stocks combined.

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

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.

In terms of future (unzoned) residential land supply stocks, there is sufficient land to satisfy an additional **3 years** of projected demand.

## YEARS OF SUPPLY – HISTORIC TREND BASED DEMAND

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 **12 years** of future demand.

In terms of future (unzoned) residential land supply stocks, there is sufficient land to satisfy an additional **2 years** of projected demand.

## POTENTIAL LOT CONSTRUCTION ACTIVITY

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 90 lots per annum will be constructed within existing zoned broadhectare and major infill areas.

This rate of anticipated lot construction is 27% greater than the recent average of broadhectare and major infill lot production. Based on anticipated lot construction activity over the next five years, around 37% of the zoned residential broadhectare and major infill stock will potentially be consumed. This indicates that there is sufficient zoned broadhectare lot stock to meet short to medium term requirements.

***Table 4: Estimated Years of Residential Broadhectare and Major Infill Land Supply, 2011***

| SLA | *Victoria in Future 2012* | | | Historic Trend Scenario | | |
|---|---|---|---|---|---|---|
| | Zoned Stocks | Unzoned Stocks | Total Stocks | Zoned Stocks | Unzoned Stocks | Total Stocks |
| Horsham – Central | 15+ | 3 | **15+** | 12 | 2 | **14** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

In total, there is sufficient zoned broadhectare stock to meet projected requirements utilising both *Victoria in Future 2012* and trend based projections. Current demand projections indicate that there is:

- **15+ years** supply of zoned stock – *Victoria in Future 2012* Projections;
- **12 years** supply of zoned stock – trend based construction.

The potential level of lot construction activity over the next five years indicates that around 37% of zoned stock is likely to be consumed during this period.

In terms of future (unzoned) residential land stocks, in total there is sufficient supply to satisfy between two to three years.

# 8.0 RESIDENTIAL TABLES

***Table 5: Minor Infill Lot Construction Activity, 2005-06 to 2010-11***

| SLA/Suburb/LGA | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Average Lots Constructed |
|---|---|---|---|---|---|---|---|
| **Horsham (RC) – Central** | **25** | **26** | **15** | **11** | **30** | **16** | **21** |
| Horsham | 25 | 26 | 15 | 11 | 30 | 16 | **21** |
| **Horsham (RC) Bal** | **0** | **5** | **4** | **11** | **6** | **2** | **5** |
| Jung | 0 | 3 | 0 | 0 | 0 | 0 | **0.5** |
| Natimuk | 0 | 2 | 2 | 7 | 4 | 1 | **3** |
| Pimpinio | 0 | 0 | 0 | 0 | 1 | 1 | **0** |
| Toolondo | 0 | 0 | 1 | 4 | 0 | 0 | **1** |
| Vectis | 0 | 0 | 1 | 0 | 1 | 0 | **0** |
| **Horsham LGA** | **25** | **31** | **19** | **22** | **36** | **18** | **25** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 6: Parent Lot Size of Minor Infill Lot Construction, 2005-06 to 2010-11***

| | Parent Lot Size Area Sqm | | | | | |
|---|---|---|---|---|---|---|
| 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 |
| **Horsham (RC) – Central** | **0** | **21** | **67** | **25** | **10** | **0** |
| Horsham | 0 | 21 | 67 | 25 | 10 | 0 |
| **Horsham (RC) Bal** | **0** | **0** | **0** | **7** | **11** | **10** |
| Jung | 0 | 0 | 0 | 0 | 1 | 2 |
| Natimuk | 0 | 0 | 0 | 6 | 7 | 3 |
| Pimpinio | 0 | 0 | 0 | 0 | 1 | 1 |
| Toolondo | 0 | 0 | 0 | 0 | 2 | 3 |
| Vectis | 0 | 0 | 0 | 1 | 0 | 1 |
| **Horsham LGA** | **0** | **21** | **67** | **32** | **21** | **10** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 7: Major Infill Lot Construction Activity, 2005-06 to 2010-11***

| | Lots/Dwellings Constructed | | | | | | |
|---|---|---|---|---|---|---|---|
| SLA/Suburb/LGA | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Average Lot Production |
| **Horsham (RC) – Central** | **13** | **16** | **0** | **0** | **0** | **0** | **5** |
| Jung | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| Pimpinio | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| Toolondo | 0 | 0 | 0 | 0 | 0 | 0 | **0** |
| Vectis | 13 | 16 | 0 | 0 | 0 | 0 | **5** |
| **Horsham LGA** | **13** | **16** | **0** | **0** | **0** | **0** | **5** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 8: Broadhectare Lot Construction Activity, 2005-06 to 2010-11***

| SLA/Suburb/LGA | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Average Lot Production |
|---|---|---|---|---|---|---|---|
| **Horsham (RC) – Central** | **221** | **29** | **5** | **0** | **113** | **28** | **66** |
| Horsham | 221 | 29 | 5 | 0 | 113 | 28 | **66** |
| **Horsham LGA** | **221** | **29** | **5** | **0** | **113** | **28** | **66** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 9: Low Density Residential Lot Construction Activity, 2005-06 to 2010-11***

| SLA/Suburb/LGA | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Total Lots Constructed |
|---|---|---|---|---|---|---|---|
| **Horsham (RC) – Central** | **0** | **0** | **0** | **2** | **0** | **0** | **2** |
| Horsham | 0 | 0 | 0 | 2 | 0 | 0 | **2** |
| **Horsham (RC) Bal** | **2** | **0** | **11** | **7** | **1** | **11** | **32** |
| Haven | 2 | 0 | 11 | 7 | 1 | 11 | **32** |
| **Horsham LGA** | **2** | **0** | **11** | **9** | **1** | **11** | **34** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 10: Rural Living Lot Construction Activity, 2005-06 to 2010-11***

| SLA/Suburb/LGA | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | Total Lots Constructed |
|---|---|---|---|---|---|---|---|
| **Horsham (RC)** | **1** | **6** | **3** | **0** | **12** | **1** | **23** |
| Haven | 1 | 2 | 1 | 0 | 0 | 1 | **5** |
| Horsham | 0 | 0 | 1 | 0 | 2 | 0 | **3** |
| Quantong | 0 | 4 | 0 | 0 | 0 | 0 | **4** |
| Riverside | 0 | 0 | 0 | 0 | 10 | 0 | **10** |
| Vectis | 0 | 0 | 1 | 0 | 0 | 0 | **1** |
| **Horsham LGA** | **1** | **6** | **3** | **0** | **12** | **1** | **23** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 11: Minor Infill (vacant lots) Supply by Lot Size Cohort, Dec 2009***

| 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 | Total Lots |
|---|---|---|---|---|---|---|---|
| **Horsham (RC) – Central** | **22** | **79** | **173** | **22** | **6** | **1** | **303** |
| Horsham | 22 | 79 | 173 | 22 | 6 | 1 | **303** |
| Horsham (RC) Bal | **0** | **2** | **5** | **19** | **39** | **10** | **75** |
| Dooen | 0 | 0 | 0 | 0 | 1 | 1 | **2** |
| Jung | 0 | 0 | 1 | 1 | 1 | 0 | **3** |
| Lower Norton | 0 | 0 | 1 | 7 | 8 | 0 | **16** |
| Mitre | 0 | 0 | 0 | 2 | 3 | 2 | **7** |
| Natimuk | 0 | 1 | 2 | 6 | 17 | 2 | **28** |
| Nurrabeil | 0 | 1 | 0 | 2 | 3 | 1 | **7** |
| Pimpinio | 0 | 0 | 1 | 1 | 6 | 4 | **12** |
| Horsham LGA | **22** | **81** | **178** | **41** | **45** | **11** | **378** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 12: Major Infill Lot Potential and Anticipated Development Timing (lots), 2011***

| SLA/Suburb/LGA | No Timing (hectares) |
|---|---|
| **Horsham (RC) – Central** | **9.93** |
| Jung | 1.63 |
| Pimpinio | 2.83 |
| Toolondo | 1.95 |
| Vectis | 3.52 |
| **Horsham LGA** | **9.93** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***Table 13: Broadhectare Lot Potential and Anticipated Development Timing (lots), 2011***

| SLA/Suburb/LGA | Development Timing (Lots) | | | | No Timing (ha) | Total Zoned Lot Potential | Future Residential (Unzoned) | Total Broad hectare Lot Stock |
|---|---|---|---|---|---|---|---|---|
| | 1-2 years | 3-5 years | 6-10 years | 11+ years | | | | |
| **Horsham (RC) – Central** | **162** | **288** | **303** | **460** | **0** | **1,213** | **309** | **1,522** |
| Horsham | 162 | 288 | 303 | 460 | 0 | **1,213** | 309 | **1,522** |
| Horsham (RC) Bal | **0** | **0** | **0** | **0** | **250** | **0** | **0** | **0** |
| Jung | 0 | 0 | 0 | 0 | 19 | **0** | 0 | **0** |
| Natimuk | 0 | 0 | 0 | 0 | 8 | **0** | 0 | **0** |
| Pimpinio | 0 | 0 | 0 | 0 | 33 | **0** | 0 | **0** |
| Toolondo | 0 | 0 | 0 | 0 | 48 | **0** | 0 | **0** |
| Vectis | 0 | 0 | 0 | 0 | 138 | **0** | 0 | **0** |
| Wartook | 0 | 0 | 0 | 0 | 5 | **0** | 0 | **0** |
| Horsham LGA | **162** | **288** | **303** | **460** | **250** | **1,213** | **309** | **1,522** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

***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.***

***Table 14(a): Occupied and Vacant Low Density Residential Zoned Lot Numbers, 2009***

| SLA/Suburb/LGA | Vacant | Occupied | Vacancy Rate (%) | Total Lots |
|---|---|---|---|---|
| **Horsham (RC) – Central** | **5** | **22** | **19%** | **27** |
| Horsham | 5 | 22 | 19% | **27** |
| **Horsham (RC) Bal** | **56** | **234** | **19%** | **290** |
| Haven | 55 | 234 | 19% | **289** |
| Vectis | 1 | 0 | 100% | **1** |
| **Horsham LGA** | **61** | **256** | **19%** | **317** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

### *Table 14(b): Occupied and Vacant Rural Living Zoned Lot Numbers, 2009*

| SLA/Suburb/LGA | Vacant | Occupied | Vacancy Rate (%) | Total Lots |
|---|---|---|---|---|
| **Horsham (RC) – Central** | **17** | **43** | **28%** | **60** |
| Horsham | 17 | 43 | 28% | **60** |
| **Horsham (RC) Bal** | **279** | **267** | **51%** | **546** |
| Dadswells Bridge | 6 | 5 | 55% | **11** |
| Dooen | 0 | 33 | 0% | **33** |
| Haven | 40 | 136 | 23% | **176** |
| Laharum | 3 | 2 | 60% | **5** |
| Noradjuha | 10 | 0 | 100% | **10** |
| Quantong | 201 | 59 | 77% | **260** |
| Riverside | 2 | 3 | 40% | **5** |
| Toolondo | 15 | 15 | 50% | **30** |
| Vectis | 2 | 14 | 13% | **16** |
| **Horsham LGA** | **296** | **310** | **49%** | **606** |

*Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011*

### *Table 15(a): Estimated and Projected Population, 2010 to 2026*

| | Estimated Resident Population | | | | |
|---|---|---|---|---|---|
| SLA /LGA | 2010 | 2011 | 2016 | 2021 | 2026 |
| Horsham (RC) – Central | 14,699 | 14,845 | 15,288 | 15,729 | 16,123 |
| Horsham (RC) Bal | 5,533 | 5,552 | 5,714 | 5,857 | 5,994 |
| **Horsham LGA** | **20,232** | **20,397** | **21,002** | **21,586** | **22,116** |

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

### *Table 15(b): Estimated and Projected Number of Dwellings, 2010 to 2026*

| | Structural Private Dwellings | | | | |
|---|---|---|---|---|---|
| SLA /LGA | 2010 | 2011 | 2016 | 2021 | 2026 |
| Horsham (RC) – Central | 6,599 | 6,691 | 7,054 | 7,437 | 7,792 |
| Horsham (RC) Bal | 2,197 | 2,214 | 2,333 | 2,452 | 2,566 |
| **Horsham LGA** | **8,796** | **8,905** | **9,387** | **9,889** | **10,358** |

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

### *Table 15(c): Projected Average Annual Change in the Number of Persons and Dwellings, 2011 to 2026*

| | Estimated Resident Population | | | | Structural Private Dwellings | | | |
|---|---|---|---|---|---|---|---|---|
| SLA /LGA | 2011 to 2016 | 2016 to 2021 | 2021 to 2026 | 2011 to 2026 | 2011 to 2016 | 2016 to 2021 | 2021 to 2026 | 2011 to 2026 |
| Horsham (RC) – Central | 89 | 88 | 79 | 85 | 73 | 77 | 71 | 73 |
| Horsham (RC) Bal | 32 | 29 | 27 | 29 | 24 | 24 | 23 | 23 |
| **Horsham LGA** | **121** | **117** | **106** | **115** | **96** | **100** | **94** | **97** |

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

### *Table 15(d): Projected Average Annual Percentage Change in the Number of Persons and Dwellings, 2011 to 2026*

| | Estimated Resident Population | | | | Structural Private Dwellings | | | |
|---|---|---|---|---|---|---|---|---|
| SLA /LGA | 2011 to 2016 | 2016 to 2021 | 2021 to 2026 | 2011 to 2026 | 2011 to 2016 | 2016 to 2021 | 2021 to 2026 | 2011 to 2026 |
| Horsham (RC) – Central | 0.6% | 0.6% | 0.5% | 0.6% | 1.1% | 1.1% | 0.9% | 1.0% |
| Horsham (RC) Bal | 0.6% | 0.5% | 0.5% | 0.5% | 1.0% | 1.0% | 0.9% | 1.0% |
| **Horsham LGA** | **0.6%** | **0.5%** | **0.5%** | **0.5%** | **1.1%** | **1.0%** | **0.9%** | **1.0%** |

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

## LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS – HORSHAM

# 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 Urban Development Program, 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.

## LOCAL GOVERNMENT AREA (LGA)

A geographical area that is administered by a local council.

## LOT

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

## MAJOR INFILL

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha. Major infill projects include residential redevelopment projects 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 Urban Development Program. Registered users can also make site-specific feedback on-line.

## MINOR INFILL

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

## NON-URBAN 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.