

Urban Development Program



2012

Regional
Residential
Report

Shire of
Bass Coast

ACKNOWLEDGEMENTS

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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. The next round of completed land supply assessments include the municipal areas of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura, as well as the G21 consortium of councils. This 'round' of land supply assessments includes the following municipalities: Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland.

This component provides information on residential supply and demand for the Shire of Bass Coast.

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 Bass Coast.

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 March 2012 residential building approval activity within the municipal area of Bass Coast has averaged 537 per annum. As measured at the March Quarter 2012 there was 443 residential dwelling approvals.

The majority of building approvals (92%) since July 2006 have been separate houses, 5% semi-detached dwellings and 3% units/apartments. The majority (61% or 325 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Bass Coast – Balance, the location of Wonthaggi, Inverloch, Corinella and Cape Paterson.

From July 2006 to March 2012 there was an average annual residential lot construction of 476. The majority (47%) were broadhectare/major infill lots, closely followed by minor infill lot construction at 45% and 8% rural residential.

The majority (29%) of residential lot construction activity was located within the suburb of Cowes, followed by Inverloch (24%) and Wonthaggi/North Wonthaggi (15%).

Lot construction and residential building approval activity as measured from July 2006 to March 2012 broadly aligns in terms of the identified volume at 476 and 537 respectively per annum.

PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 there will be a total dwelling requirement of 11,289 (753 average per annum).

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. This demand scenario results in an average annual dwelling requirement of 557 dwellings per annum.

This growth scenario results in a 26% (2,928 dwellings) decrease in total dwelling requirements from 2011 to 2026.

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total (excluding minor infill) there is a residential lot supply of approximately 10,025. This is comprised of:

- 5,580 zoned broadhectare/major infill lots (57% of supply);
- 194 vacant rural residential lots (2% of supply); and
- 4,251 designated future residential lots (41% of supply).

As at December 2009, there was 2,509 minor infill lots identified. Of these lots, 2,314 were sized less than 1,200sqm or 92% of the identified lots.

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 5,580 of which 33% (1,822 lots) is located in Wonthaggi/North Wonthaggi/Wattle Bank, 18% (1,020 lots) in Cowes and 14% (802 lots) in Inverloch.

Within the municipal area of Bass Coast, there is an estimated lot potential within Future Residential areas of approximately 4,251. In addition to the above 'future residential' land stocks there are additional supply areas that have not been assessed in terms of potential lot yield. This potential residential land supply is located in San Remo and is approximately 35 hectares in size.

As at December 2009 across the municipality of Bass Coast there was a total lot stock of rural residential allotments of 659. Of this stock, 194 lots were vacant, a lot vacancy rate of 29%. A total of 97 hectares of future rural residential land stocks have been identified.

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 is sufficient to satisfy demand for:

- 15 years: Bass Coast (S) - Phillip Is. SLA; and
- 15 years: Bass Coast (S) Bal SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy over 10 years of projected demand across the municipal area. Unzoned (future) broadhectare supply by SLA is sufficient to satisfy demand for:

- 14 years: Bass Coast (S) Bal SLA.

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 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA is sufficient to satisfy demand for:

- 15+ years: Bass Coast (S) - Phillip Is. SLA; and
- 15+ years: Bass Coast (S) Bal SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy 15+ years of projected demand. Unzoned broadhectare supply by SLA is sufficient to satisfy demand for:

- 15+ years: Bass Coast (S) Bal SLA.

Conclusions and Current Actions

In summary there is an adequate stock of total residential land to meet *Victoria in Future* and trend based consumption rates across the Shire of Bass Coast.

Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand, and identify any impediments to the delivery of allotments in the short-term.

Based on *Victoria in Future 2012* projections, the Shire of Bass Coast currently has around 15 years supply of zoned residential land stocks across the municipality.

In terms of 'future' or unzoned land stocks, there are sufficient stocks to satisfy an additional 10 years of additional demand.

Wonthaggi has been identified within the Bass Coast Planning Scheme's settlement hierarchy as a regional centre with high spatial growth capacity; and will be encouraged to accommodate large scale residential growth within the town boundary, particularly the north east growth area.

The Wonthaggi Strategic Framework Plan establishes a clear direction for the future physical form of Wonthaggi in that it identifies the preferred location for the various forms of land uses within the township; and is supported by the Wonthaggi Dalyston Structure Plan, adopted by Council back in September 2008.

Bass Coast Council has introduced the "Moving Forward" project, which sees the implementation of the Wonthaggi Dalyston Structure Plan. The project will ensure that there is an adequate supply of land for residential, industrial and commercial uses in the area to meet future population growth.

Bass Coast Council is also in the process of finalising a 'Bass Coast Land Release Management Plan'. The Land Release Management Plan is intended to provide a clear direction for managing population growth and the spatial expansion of settlements.

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. Initially, these included the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga. The next group of land supply assessments for completion include the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura; as well as the G21 consortium of councils.

This 'round' of land supply assessments includes the following municipalities: Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland.

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 residential and industrial land supply assessments for Bass Coast Shire 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 2012 URBAN DEVELOPMENT PROGRAM REPORTS

The 2012 Urban Development Program Reports for Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland, as well as additional Regional Reports and the metropolitan Urban Development Program Annual Report, 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 Maps Online visit www.land.vic.gov.au/udp

For more information about the Urban Development Program, email the Department of Transport, Planning and Local Infrastructure 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 (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 Governments Housing Development Data project. It involves the extensive cleaning of the residential cadastre and the application of this cadastre to the land supply types identified above.

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

Construction activity has been assessed on an annual basis as at July of each year from 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, 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 (2012–2013);
- 3 to 5 years (2014–2016);
- 6 to 10 years (2017–2021);
- 11 years or more (2022 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 municipal area. Sufficient stock of residential land is required to maintain an ongoing supply to the market and to contribute to:

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

For the purpose of reporting on the 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

Bass Coast Shire is located in the West and South Gippsland region of Victoria, 52 kilometres south east of Dandenong and an hour and a half drive from central Melbourne. Bass Coast Shire covers approximately 800 square kilometres. It is predominantly a coastal municipality defined by the unique foreshore habitats of Bass Strait, the Bunurong Coast, Western Port and Anderson Inlet. The coastal areas are complemented by rural hinterland, river flats, and the Strzelecki Foothills.

The major population centres are Wonthaggi, Cowes, San Remo and Inverloch. Aside from Wonthaggi the larger centres are coastal communities with large population fluctuations during holiday and summer periods. Wonthaggi is located inland from the coast. It has a predominately permanent population, and has traditionally provided a link with the agricultural and rural communities.

There are a number of other towns and villages in the Shire. These range from small rural communities and small coastal hamlets, to developing activity centres such as Grantville.

Over recent years, Bass Coast Shire Council has been developing structure plans and design frameworks for a number of towns and will continue to develop these plans for the main residential areas across the Shire. The purpose of these plans is to define settlement boundaries for urban areas, provide strategic direction for managing population growth and to ensure sustainable land use practices.¹

This report covers the trends and shifts in building activity across the municipality of Bass Coast, 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 Bass Coast. It is supported by datasets from the Australian Bureau of Statistics.

¹ *Shire of Bass Coast Planning Scheme*

4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction, dwelling approvals and sales values achieved across the municipal area of Bass Coast. Residential lot construction activity is detailed from July 2006 to March 2012 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 March 2012 residential building approval activity within the municipal area of Bass Coast has averaged 537 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 609 in 2010-11 and troughed at 460 in 2008-09. As measured at the March Quarter 2012 there was 443 residential dwelling approvals.

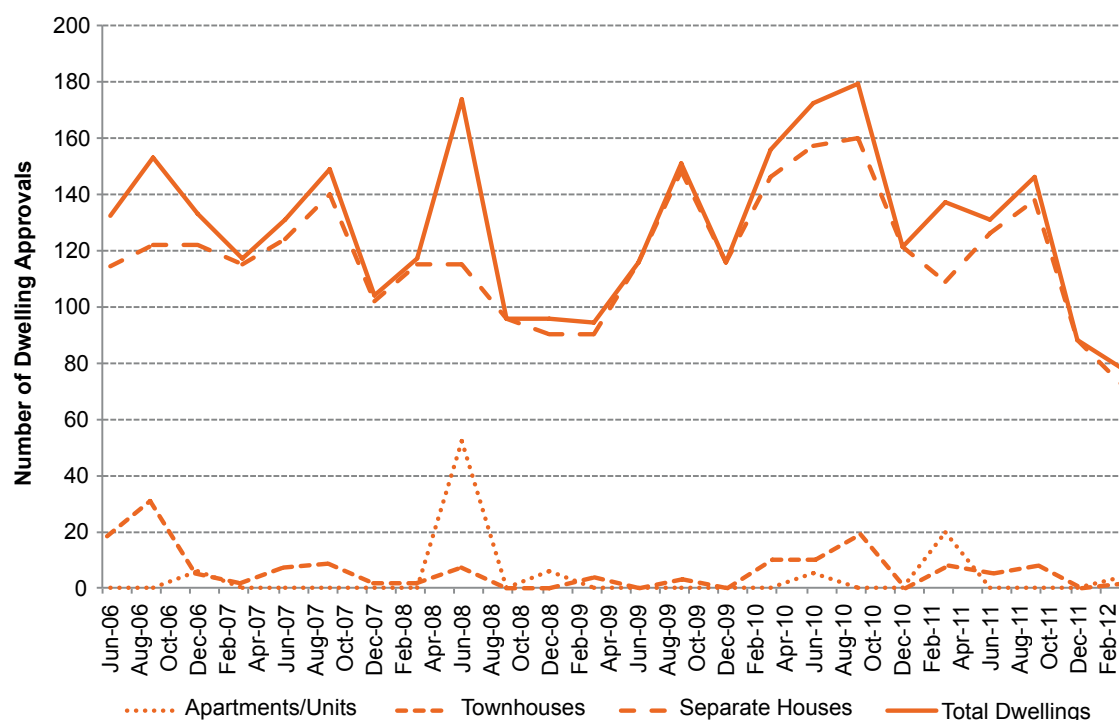
Graph 1 illustrates the amount of building approval activity by dwelling type on a quarterly basis for the municipal area of Bass Coast.

The vast majority of building approvals (92%) since July 2006 have been separate houses, 5% semi-detached dwellings and 3% units/apartments.

The majority (61% or 325 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Bass Coast – Balance, the location of Wonthaggi, Inverloch, Corinella and Cape Paterson.

Within the Bass Coast – Phillip Island SLA there was 212 residential dwelling approvals per annum from July 2006 to March 2012, representing 39% of the municipalities total approval activity. This SLA includes the major urban centre of Cowes.

Graph 1: Number of Residential Building Approvals by Type, July 2006 to March 2012



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 July 2006 to March 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 municipal area of Bass Coast. From July 2006 to March 2012 there was an average annual residential lot construction of 476. The majority (47%) were broadhectare/major infill lots, closely followed by minor infill lot construction at 45% and 8% rural residential.

In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2007-08 at 231 lots and 'peaked' in 2009-10 at 992 lots. As measured to the March Quarter 2012 there have been 476 residential 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 majority (29%) of residential lot construction activity was located within the suburb of Cowes, followed by Inverloch (24%) and Wonthaggi/North Wonthaggi (15%).

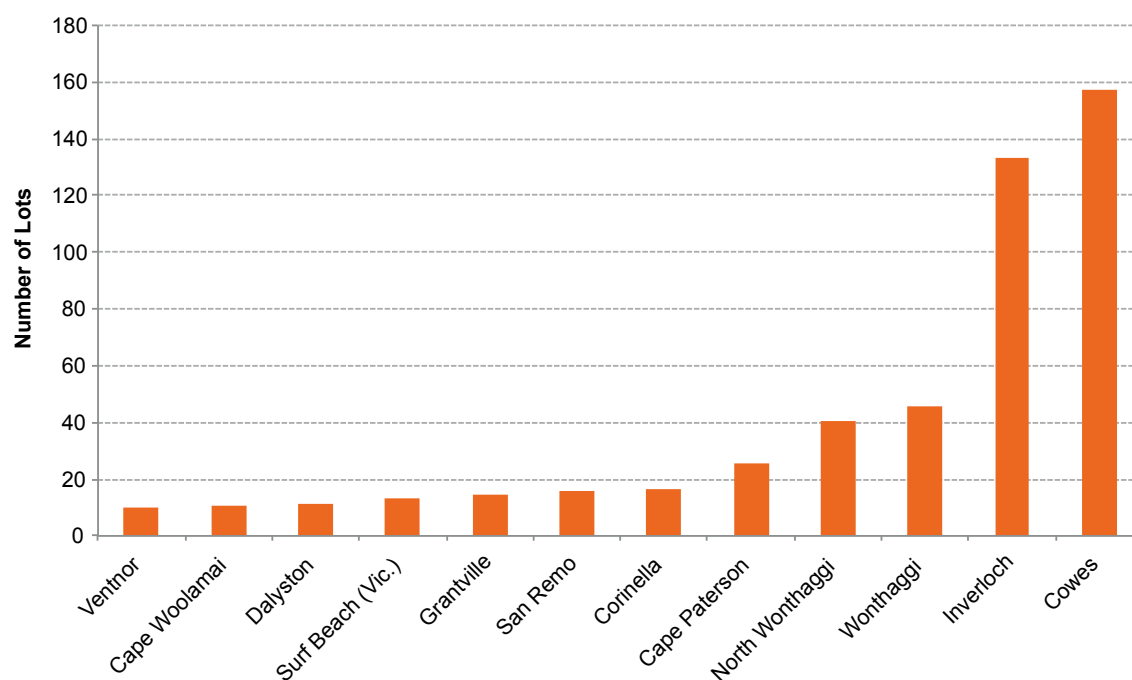
Lot construction and residential building approval activity as measured from July 2006 to March 2012 broadly aligns in terms of the identified volume at 476 and 537 respectively per annum. However the difference infers the construction of dwellings on vacant allotments constructed prior to July 2006.

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



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

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



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

Note: Includes – broadhectare, major infill, minor infill and rural residential lot construction.

4.2.1 MINOR INFILL LOT CONSTRUCTION

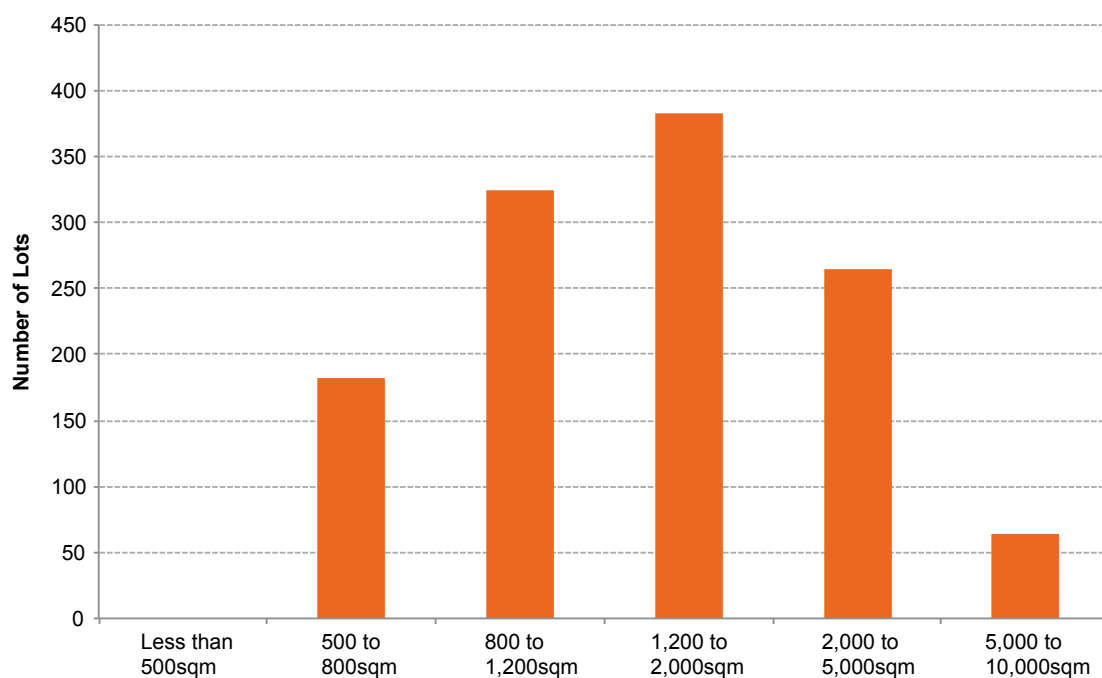
Minor infill lot construction activity as measured from July 2006 to March 2012 across the municipal area of Bass Coast averaged 212 lots per annum. This represents 45% of all residential lot construction activity across the municipal area.

Minor infill lot construction activity was concentrated within the established urban areas of Cowes, Inverloch and Wonthaggi.

As measured annually from July 2006 to March 2012, the amount of minor infill lot construction activity has varied significantly. In 2006-07 there were approximately 289 minor infill lots constructed, decreasing to 98 in 2007-08. The level of activity significantly increased to 542 lots in 2009-10 and subsequently decreased to only 69 lots the following year. As measured to the March Quarter 2012 there have been 99 minor infill lots constructed.

Of the 1,219 minor infill lots constructed 42% were constructed on 'parent' lots sized less than 1,200sqm, there were no lots constructed on 'parent' lots less than 500sqm. There were 383 lots constructed (31%) on parent lots sized from 1,200 to 2,000sqm. 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, July 2006 to March 2012



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

Note: Parent lot size refers to the size of the allotment prior to subdivision.

4.2.2 BROADHECTARE & MAJOR INFILL LOT CONSTRUCTION

Broadhectare/Major Infill lot construction activity as measured from July 2006 to March 2012 across the municipal area of Bass Coast averaged 225 lots per annum. This represents 47% of all residential lot construction activity across the municipal area.

Broadhectare lot construction activity was located mainly in the urban areas of Inverloch, Cowes and Wonthaggi/North Wonthaggi.

As measured annually from July 2006 to March 2012, the amount of broadhectare lot construction activity has varied significantly. In 2006-07 there was approximately 202 broadhectare lots constructed, declining to 111 lots in 2007-08. Broadhectare lot production rapidly increased to 164 in 2008-09, increasing further to 433 in 2009-10. Since then lot production has declined to 156 in 2010-11.

As measured to the March Quarter 2012 there have been 229 broadhectare/major infill lots constructed.

4.2.3 RURAL RESIDENTIAL LOT CONSTRUCTION

Rural Residential lot construction activity as measured from July 2006 to March 2012 across the municipal area of Bass Coast has averaged 39 lots per annum. This represents 8% of all residential lot construction activity across the municipal area.

Of this lot construction activity – 94% was zoned Low Density Residential (LDRZ) and 6% Rural Living (RLZ). The majority of this subdivision activity was located in the suburb of Cowes and to a lesser degree, Harmers Haven and San Remo.

From July 2006 to March 2012 there was an average annual residential lot construction of 476. The majority (47%) were broadhectare/major infill lots, closely followed by minor infill lot construction at 45% and 8% rural residential.

Residential building approval activity over the same period has averaged 537 per annum. Of these building approvals the vast majority (92%) have been for separate houses.

Analysis of the amount of building approvals and residential lot construction indicates a functioning residential land market within Bass Coast. However, the disparity between residential dwelling approvals and lot constructed should be monitored to identify any increasing lot production trends and if not, to investigate if there are any impediments to the delivery of allotments in the short-term.

5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the municipality of Bass Coast as at March 2012. 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;
- Future Residential; 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 municipal area of Bass Coast as at March 2012. In total (excluding minor infill) there is a residential lot supply of approximately 10,025. This is comprised of:

- 5,580 zoned broadhectare/major infill lots (57% of supply);
- 194 vacant rural residential lots (2% of supply); and
- 4,251 designated future residential lots (41% 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 2012

SLA/Suburb/LGA	Lots				No Estimated Yield (Area hectares)	
	Broad hectare	Rural Residential	Future (unzoned)	Total Lots	Broad hectare	Future (unzoned)
Bass Coast (S) - Phillip Is.	1,502	27	77	1,606	0	0
Cape Woolamai	64	0	0	64	0	0
Cowes	1,020	8	0	1,028	0	0
Rhyll	48	0	77	125	0	0
Silverleaves	0	4	0	4	0	0
Sunset Strip (Vic.)	0	2	0	2	0	0
Surf Beach (Vic.)	0	4	0	4	0	0
Ventnor (Vic.)	370	9	0	379	0	0
Bass Coast (S) Bal	4,078	167	4,174	8,419	14.9	34.7
Bass	0	1	0	1	0	0
Corinella (Vic.)	60	3	270	333	0	0
Coronet Bay	231	0	0	231	0	0
Dalyston	233	0	0	233	3.7	0
Grantville	400	19	0	419	0	0
Harmers Haven	0	20	0	20	0	0
Inverloch	802	28	920	1,750	0	0
Kilcunda	124	5	0	129	1.1	0
North Wonthaggi	127	12	0	139	0	0
San Remo (Vic.)	406	41	0	447	10.0	34.7
The Gurdies	0	9	0	9	0	0
Wattle Bank	1,582	10	2,354	3,946	0	0
Wonthaggi	113	18	630	761	0	0
Woolamai	0	1	0	1	0	0
Bass Coast (S)	5,580	194	4,251	10,025	14.9	34.7

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

Note: Rural Residential 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. 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 December 2009, there was 2,509 minor infill lots identified. Of these lots, 2,314 were sized less than 1,200sqm or 92% of the identified lots. In addition there were:

- 113 vacant lots sized between 1,200 to 2,000sqm;
- 68 lots sized from 2,000sqm to 5,000sqm; and
- 14 lots sized from 5,000 to 10,000sqm.

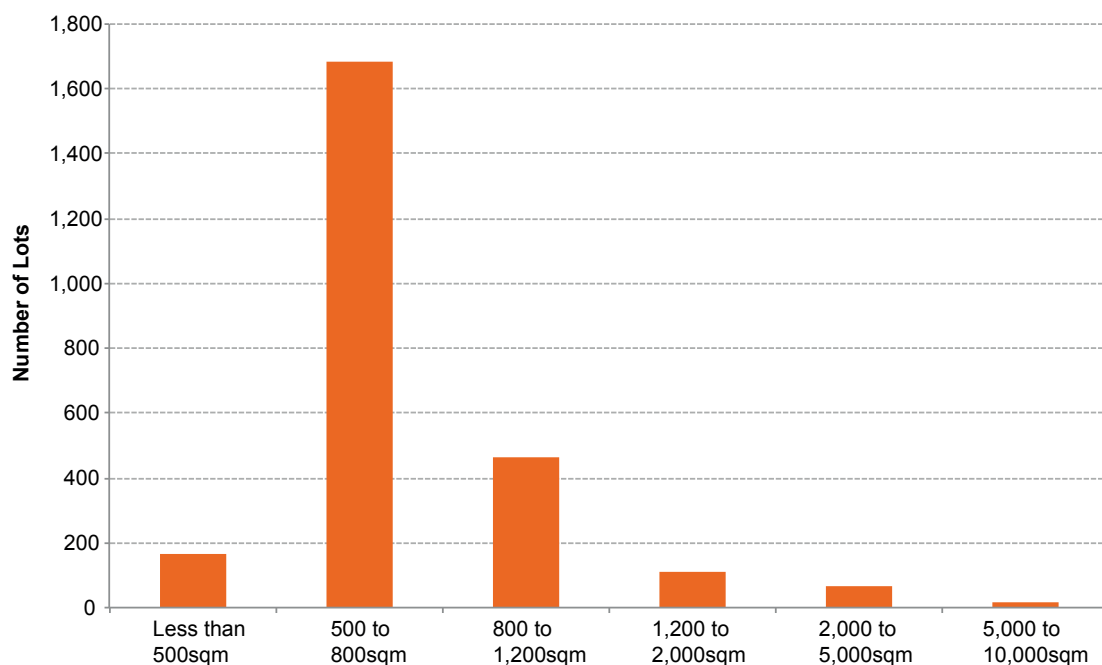
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 45% of lot construction activity across Bass Coast was minor infill, and of this lot construction, 42% was from parent lots sized 1,200sqm or less.

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

- Cowes – 538 lots;
- Inverloch – 435 lots;
- Corinella – 136 lots; and
- Surf Beach – 134 lots.

Graph 5: Minor Infill Supply – Number of Vacant Zoned Residential Allotments, by Lot Size Cohort, 2009



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

5.2 BROADHECTARE & MAJOR INFILL SUPPLY

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 5,580 of which 33% (1,822 lots) is located in Wonthaggi/North Wonthaggi/Wattle Bank, 18% (1,020 lots) in Cowes and 14% (802 lots) in Inverloch. Table 2 identifies the lot yield and estimated development timing of zoned broadhectare lot stock.

Table 2: Anticipated Lot Construction Activity – Broadhectare/Major Infill, 2012

SLA/LGA	Zoned Lot Potential					Total Zoned Stocks	Potential Residential (unzoned)	Total Lots (zoned/un-zoned)
	1-2 years	3-5 years	6-10 years	11+ years	No Timing ²			
Bass Coast (S) - Phillip Is.	421	372	533	0	176	1,502	77	1,579
Bass Coast (S) Bal	888	878	1,118	630	564	4,078	4,174	8,252
Bass Coast (S)	1,309	1,250	1,651	630	740	5,580	4,251	9,831

² 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 2012

Zoned broadhectare lot potential represents 57% of the total existing residential land supply across the municipal area of Bass Coast.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 602 lots per annum will be constructed within existing zoned broadhectare areas. Over the 6-10 year period only 1,651 lots in total are anticipated to be constructed, this is primarily due to the stock of zoned broadhectare land being largely consumed over the next five years.

However, recent broadhectare lot construction activity across the municipality has averaged 225 per annum, a significant difference in terms of anticipated construction levels.

In addition, there is a broadhectare lot stock of 740 that no development timing has been attributed. This stock is located in Grantville, Inverloch, Cowes and Kilcunda.

NO YIELD

A total 15 hectares (4 lots) 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:

- San Remo – 10 hectares;
- Dalyston – 4 hectares; and
- Kilcunda – 1 hectare.

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 Bass Coast 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.

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.

Within the municipal area of Bass Coast, there is an estimated lot potential within Future Residential areas of approximately 4,251. Of this lot potential:

- 2,354 lots are located in Wattle Bank;
- 920 lots are located in Inverloch;
- 630 lots are located in Wonthaggi;
- 270 lots are located in Corinella; and
- 77 lots are located in Rhyll.

In addition to the above 'future residential' land stocks there are additional supply areas that have not been assessed in terms of potential lot yield. This potential residential land supply is located in San Remo and is approximately 35 hectares in size.

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 December 2009. 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.

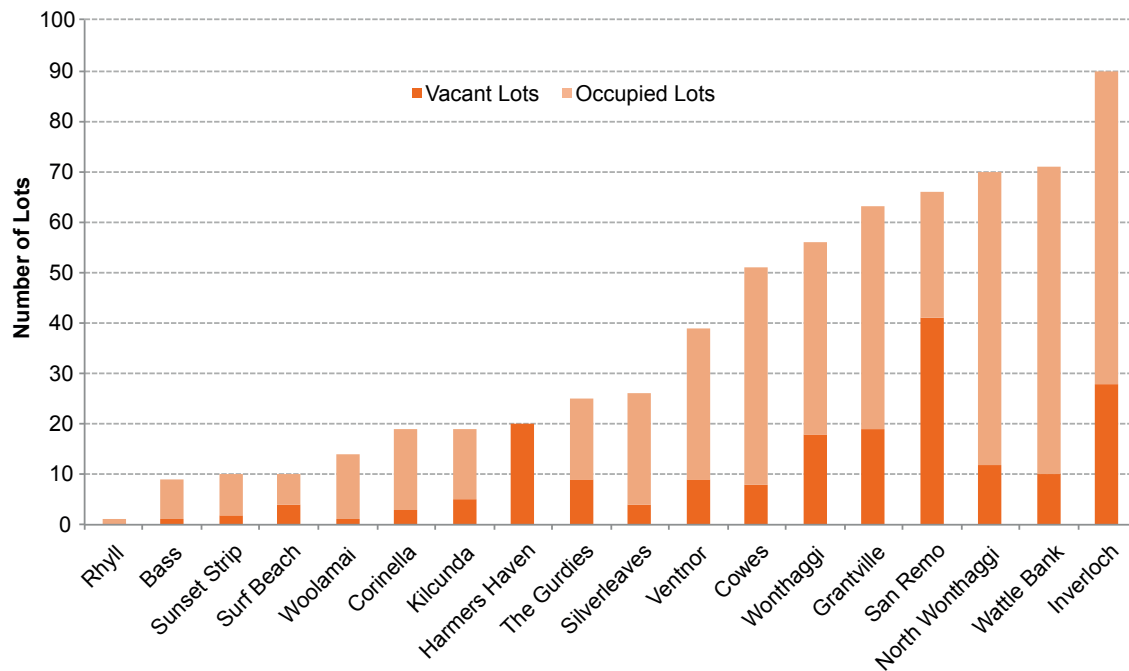
As at December 2009 across the municipality of Bass Coast there was a total lot stock of rural residential allotments of 659. Of this stock, 194 lots were vacant, a lot vacancy rate of 29%. Graph Six summarises the stock of both occupied and vacant rural residential allotments by suburb.

By zone type, as at December 2009 there were 454 Low Density Residential (LDRZ) allotments, of which 149 were vacant across the municipality, a lot vacancy of 33%. In comparison, there were a total of 205 Rural Living (RLZ) zoned allotments, of which 45 were vacant – a lot vacancy rate of 22%.

The location of the majority of rural residential lots across the municipality includes:

- Inverloch - total 90 lots (lot vacancy of 31%);
- Wattle Bank - total 71 lots (lot vacancy of 14%);
- North Wonthaggi - total 70 lots (lot vacancy of 17%);
- San Remo - total 66 lots (lot vacancy of 62%);
- Grantville - total 63 lots (lot vacancy of 30%); and
- Wonthaggi - total 56 lots (lot vacancy of 32%).

Graph 6: Stock of Vacant and Occupied 'rural residential' Allotments, 2009



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

Future rural residential (LDRZ and or RLZ) unzoned areas have been identified through Council consultation and are geographically identified in the accompanying maps. In summary a total of 97 hectares of future rural residential land stocks have been identified, of which 86 hectares is future LDRZ and 11 hectares is for future RLZ. The location of the future rural residential land stocks is detailed in Table 12.

In total (excluding minor infill) there is a residential lot supply of approximately 10,025. This is comprised of:

- 5,580 zoned broadhectare/major infill lots (57% of supply);
- 194 vacant rural residential lots (2% of supply); and
- 4,251 designated future residential lots (41% of supply).

As at December 2009, there was 2,509 minor infill lots identified. Of these lots, 2,314 were sized less than 1,200sqm or 92% of the identified lots.

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 5,580 of which 33% (1,822 lots) is located in Wonthaggi/North Wonthaggi/Wattle Bank, 18% (1,020 lots) in Cowes and 14% (802 lots) in Inverloch.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 602 lots per annum will be constructed within existing zoned broadhectare areas.

However, recent broadhectare lot construction activity across the municipality has averaged 225 per annum, a significant difference in terms of anticipated construction levels.

Within the municipal area of Bass Coast, there is an estimated lot potential within Future Residential areas of approximately 4,251. In addition to the above 'future residential' land stocks there are additional supply areas that have not been assessed in terms of potential lot yield. This potential residential land supply is located in San Remo and is approximately 35 hectares in size.

As at December 2009 across the municipality of Bass Coast there was a total lot stock of rural residential allotments of 659. Of this stock, 194 lots were vacant, a lot vacancy rate of 29%.

A total of 97 hectares of future rural residential land stocks have been identified.

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* undertaken by the (former) 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 municipal area of Bass Coast. 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 there will be a total dwelling requirement of 11,289 (753 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 725;
- 2016 to 2021 - 753; and
- 2021 to 2026 - 780.

As measured from 2011 to 2026, the average annual projected demand by SLA within the municipality of Bass Coast is:

Phillip Island: 256 dwellings per annum (e.g. Cowes, Surf Beach, Ventnor); and

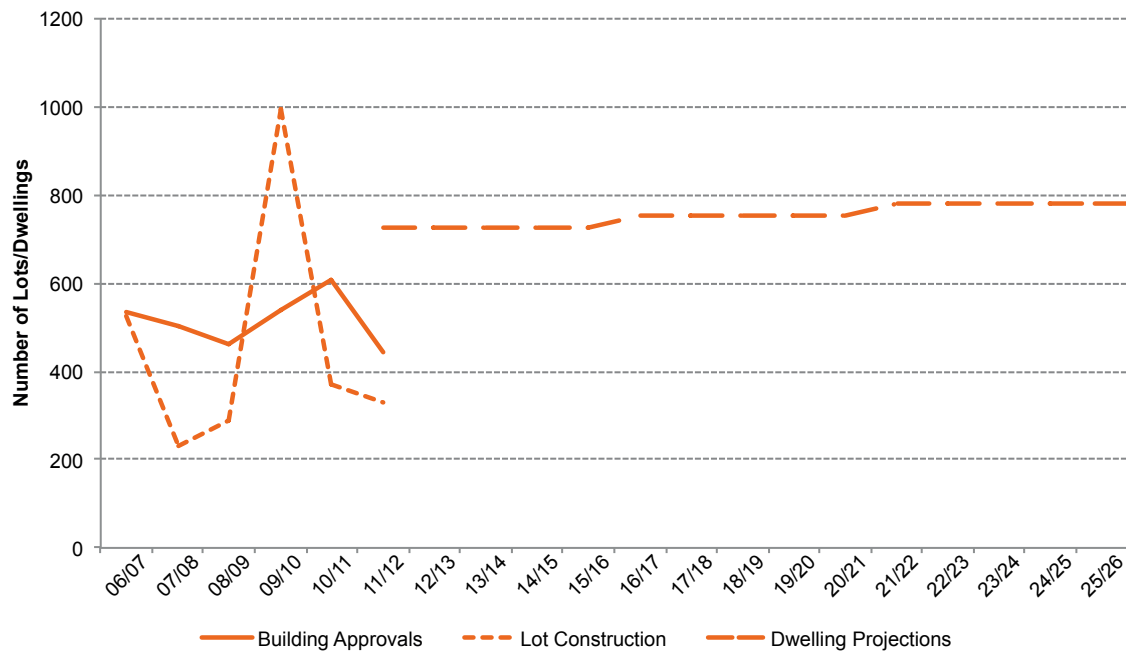
Balance: 496 dwellings per annum (e.g. Inverloch, Wonthaggi, Cape Paterson).

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 - 537;
- 2016 to 2021 - 557; and
- 2021 to 2026 - 578.

This growth scenario results in a 26% (2,928 dwellings) decrease in total dwelling requirements from 2011 to 2026.

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



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 the State Governments Population and Household Projections (Victoria in Future 2012) indicate that from 2011 to 2026 there will be a total dwelling requirement of 11,289 (753 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 725;
- 2016 to 2021 - 753; and
- 2021 to 2026 - 780.

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 - 537;
- 2016 to 2021 - 557; and
- 2021 to 2026 - 578.

This growth scenario results in a 26% (2,928 dwellings) decrease 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 2006 to March 2012) lot construction activity it is estimated that within the Bass Coast (S) - Phillip Is. SLA 35% of dwelling requirements was for broadhectare/major infill allotments and 55% within the Bass Coast (S) Bal 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 is sufficient to satisfy demand for:

- 15 years: Bass Coast (S) - Phillip Is. SLA; and
- 15 years: Bass Coast (S) Bal SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy 10 years of projected demand across the municipal area. Unzoned broadhectare supply by SLA is sufficient to satisfy demand for:

- 14 years: Bass Coast (S) Bal SLA.

YEARS OF SUPPLY – 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 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA is sufficient to satisfy demand for:

- 15+ years: Bass Coast (S) - Phillip Is. SLA; and
- 15+ years: Bass Coast (S) Bal SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy 15+ years of projected demand. Unzoned broadhectare supply by SLA is sufficient to satisfy demand for:

- 15+ years: Bass Coast (S) Bal SLA.

Table 3: Estimated Years of Residential Broadhectare and Major Infill Land Supply, 2012

SLA/LGA	VIF2012 Projection Scenario			Historic Trend Scenario		
	Zoned Stocks	Future Stocks	Total Stocks	Zoned Stocks	Future Stocks	Total Stocks
Bass Coast (S) - Phillip Is.	15	0	15+	15+	0	15+
Bass Coast (S) Bal	15	14	15+	15+	15+	15+
Bass Coast (S)	15	10	15+	15+	15+	15+

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

8.0 RESIDENTIAL TABLES

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ³	Average Lot Production
Bass Coast (S) - Phillip Is.	151	52	59	251	24	20	97
Cape Woolamai	6	11	0	36	0	0	9
Cowes	91	20	42	103	23	11	50
Newhaven	1	2	0	7	0	0	2
Rhyll	22	0	2	9	0	2	6
Silverleaves	0	1	3	19	0	0	4
Smiths Beach	7	4	0	5	0	0	3
Sunset Strip (Vic.)	0	0	0	7	0	2	2
Surf Beach (Vic.)	11	7	9	35	0	2	11
Ventnor (Vic.)	12	6	2	25	1	1	8
Wimbledon Heights	1	1	1	5	0	2	2
Bass Coast (S) Bal	138	46	63	291	45	79	115
Bass	0	1	1	3	0	0	1
Cape Paterson	7	2	8	42	5	0	11
Corinella (Vic.)	31	4	1	15	3	15	12
Coronet Bay	4	1	1	1	2	5	2
Dalyston	8	0	0	19	1	2	5
Grantville	3	1	0	11	5	13	6
Harmers Haven	0	0	0	1	0	0	0
Inverloch	27	26	21	62	13	14	28
Kilcunda	1	3	6	5	0	0	3
North Wonthaggi	12	2	5	36	5	4	11
Pioneer Bay	0	0	0	2	1	2	1
San Remo (Vic.)	4	4	0	7	0	12	5
South Dudley	10	0	3	12	0	0	4
Tenby Point	0	0	0	2	0	0	0
The Gurdies	0	0	2	2	0	0	1
Wonthaggi	31	2	15	71	10	12	25
Bass Coast (S)	289	98	122	542	69	99	212

³ From July 2011 to March 2012

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

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

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
Bass Coast (S) - Phillip Is.	0	105	137	221	82	12
Cape Woolamai	0	12	26	14	1	0
Cowes	0	59	66	109	49	7
Newhaven	0	0	5	2	3	0
Rhyll	0	0	0	20	10	5
Silverleaves	0	4	1	15	3	0
Smiths Beach	0	10	2	4	0	0
Sunset Strip (Vic.)	0	2	1	6	0	0
Surf Beach (Vic.)	0	15	21	28	0	0
Ventnor (Vic.)	0	2	13	17	15	0
Wimbledon Heights	0	1	2	6	1	0
Bass Coast (S) Bal	0	77	188	162	183	52
Bass	0	0	0	0	2	3
Cape Paterson	0	20	28	10	6	0
Corinella (Vic.)	0	0	5	14	43	7
Coronet Bay	0	0	8	6	0	0
Dalyston	0	2	0	9	19	0
Grantville	0	0	3	8	20	2
Harmers Haven	0	0	1	0	0	0
Inverloch	0	25	29	50	28	31
Kilcunda	0	0	2	0	13	0
North Wonthaggi	0	8	19	17	20	0
Pioneer Bay	0	0	5	0	0	0
San Remo (Vic.)	0	8	9	7	3	0
South Dudley	0	2	8	14	1	0
Tenby Point	0	0	0	0	2	0
The Gurdies	0	0	0	2	2	0
Wonthaggi	0	12	71	25	24	9
Bass Coast (S)	0	182	325	383	265	64

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

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ³	Average Lot Production
Bass Coast (S) - Phillip Is.	27	103	0	113	35	106	67
Cape Woolamai	0	0	0	0	0	0	0
Cowes	0	103	0	113	35	106	62
Rhyll	0	0	0	0	0	0	0
Sunset Strip (Vic.)	27	0	0	0	0	0	5
Ventnor (Vic.)	0	0	0	0	0	0	0
Bass Coast (S) Bal	175	8	164	320	121	123	158
Cape Paterson	0	0	65	0	0	0	11
Corinella (Vic.)	14	0	0	0	0	0	2
Coronet Bay	12	0	0	0	0	0	2
Dalyston	0	0	0	28	0	0	5
Grantville	0	0	0	0	32	0	6
Inverloch	116	8	59	142	45	123	86
Kilcunda	0	0	0	0	0	0	0
North Wonthaggi	0	0	40	75	24	0	24
San Remo (Vic.)	0	0	0	28	10	0	7
South Dudley	0	0	0	0	10	0	2
Wattle Bank	0	0	0	0	0	0	0
Wonthaggi	33	0	0	47	0	0	14
Bass Coast (S)	202	111	164	433	156	229	225

³ From July 2011 to March 2012

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 2012

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ³
Bass Coast (S) Bal	34	14	1	8	3	0
Corinella (Vic.)	0	0	0	1	0	0
Grantville	5	1	0	2	0	0
Harmers Haven	18	0	0	0	2	0
Inverloch	2	8	0	0	0	0
San Remo (Vic.)	6	4	0	3	1	0
Wonthaggi	3	1	1	2	0	0
Bass Coast (S)	34	19	3	13	142	0

³ From July 2011 to March 2012

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

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ³
Bass Coast (S) Bal	1	3	0	4	5	0
Inverloch	0	0	0	0	1	0
Wattle Bank	0	3	0	4	4	0
Woolamai	1	0	0	0	0	0
Bass Coast (S)	1	3	0	4	5	0

³ From July 2011 to March 2012

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

Table 9: 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
Bass Coast (S) - Phillip Is.	101	760	212	39	22	5	1,139
Cape Woolamai	2	57	2	0	0	0	61
Cowes	42	369	78	27	20	2	538
Newhaven	5	4	5	0	0	1	15
Rhyll	2	24	15	2	1	2	46
Silverleaves	0	37	8	2	0	0	47
Smiths Beach	7	46	1	0	0	0	54
Sunset Strip (Vic.)	11	50	0	1	0	0	62
Surf Beach (Vic.)	20	56	56	2	0	0	134
Ventnor (Vic.)	3	78	42	4	1	0	128
Wimbeldon Heights	9	39	5	1	0	0	54
Bass Coast (S) Bal	65	925	251	74	46	9	1,370
Bass	0	0	0	1	5	0	6
Cape Paterson	14	84	8	1	2	0	109
Corinella (Vic.)	9	56	54	6	11	0	136
Coronet Bay	16	74	5	0	0	0	95
Dalyston	1	57	28	8	2	2	98
Grantville	0	76	17	8	8	2	111
Harmers Haven	0	5	0	0	0	1	6
Inverloch	11	347	58	12	6	1	435
Kilcunda	1	20	22	5	7	0	55
North Wonthaggi	3	33	13	2	1	0	52
Pioneer Bay	1	35	3	1	0	0	40
San Remo (Vic.)	3	97	9	3	1	0	113
Tenby Point	1	0	1	16	1	0	19
The Gurdies	0	7	0	0	1	0	8
Wonthaggi	5	34	33	11	1	3	87
Bass Coast	166	1,685	463	113	68	14	2,509

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

Table 10: Broadhectare/Major Infill Lot Potential and Anticipated Development Timing (lots), 2012

SLA/Suburb/LGA	Zoned Lot Potential						Potential Residential (unzoned)	Total Lots (zoned/un-zoned)
	1-2 years	3-5 years	6-10 years	11+ years	No Timing ⁴	Total Zoned Stocks		
Bass Coast (S) - Phillip Is.	421	372	533	0	176	1,502	77	1,579
Cape Woolamai	32	32	0	0	0	64	0	64
Cowes	319	220	305	0	176	1,020	0	1,020
Rhyll	0	0	48	0	0	48	77	125
Sunset Strip (Vic.)	0	0	0	0	0	0	0	0
Ventnor (Vic.)	70	120	180	0	0	370	0	370
Bass Coast (S) Bal	888	878	1,118	630	564	4,078	4,174	8,252
Cape Paterson	0	0	0	0	0	0	0	0
Corinella (Vic.)	0	0	60	0	0	60	270	330
Coronet Bay	131	0	100	0	0	231	0	231
Dalyston	103	65	65	0	0	233	0	233
Grantville	78	42	40	0	240	400	0	400
Inverloch	150	247	205	0	200	802	920	1,722
Kilcunda	0	0	0	0	124	124	0	124
North Wonthaggi	127	0	0	0	0	127	0	127
San Remo (Vic.)	78	140	188	0	0	406	0	406
South Dudley	0	0	0	0	0	0	0	0
Wattle Bank	144	370	460	608	0	1,582	2,354	3,936
Wonthaggi	77	14	0	22	0	113	630	743
Bass Coast (S)	1,309	1,250	1,651	630	740	5,580	4,251	9,831

⁴ 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 2012

Table 11: Broadhectare/Major Infill Stocks – No Timing or Yield, 2012

SLA/Suburb/LGA	Area (ha)	No. of Lots
Bass Coast (S) Bal	14.9	4
Dalyston	3.7	1
Kilcunda	1.1	1
San Remo (Vic.)	10.0	2
Bass Coast (S)	14.9	4

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 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 2012

Table 12: Future Rural Residential Stock (Hectares), 2012

SLA/Suburb/LGA	LDRZ	RLZ	Total Area (ha)
Bass Coast (S) Bal	86	11	97
Bass	21	0	21
Corinella (Vic.)	22	0	22
Coronet Bay	44	0	44
Kilcunda	0	11	11
Bass Coast (S)	86	11	97

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

Table 13: Occupied and Vacant Rural Residential Lot Stock by Zone Type, 2009

SLA/Suburb/LGA	LDRZ				RLZ			
	Vacant	Occupied	Vacancy Rate (%)	Total Lots	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Bass Coast (S) - Phillip Is.	27	110	20%	137	0	0	0%	0
Cowes	8	43	16%	51	0	0	0%	0
Rhyll	0	1	0%	1	0	0	0%	0
Silverleaves	4	22	15%	26	0	0	0%	0
Sunset Strip (Vic.)	2	8	20%	10	0	0	0%	0
Surf Beach (Vic.)	4	6	40%	10	0	0	0%	0
Ventnor (Vic.)	9	30	23%	39	0	0	0%	0
Bass Coast (S) Bal	122	195	38%	317	45	160	22%	205
Bass	0	0	0%	0	1	8	11%	9
Corinella (Vic.)	3	16	16%	19	0	0	0%	0
Grantville	19	44	30%	63	0	0	0%	0
Harmers Haven	20	0	100%	20	0	0	0%	0
Inverloch	9	14	39%	23	19	48	28%	67
Kilcunda	0	0	0%	0	5	14	26%	19
North Wonthaggi	12	58	17%	70	0	0	0%	0
San Remo (Vic.)	41	25	62%	66	0	0	0%	0
The Gurdies	0	0	0%	0	9	16	36%	25
Wattle Bank	0	0	0%	0	10	61	14%	71
Wonthaggi	18	38	32%	56	0	0	0%	0
Woolamai	0	0	0%	0	1	13	7%	14
Bass Coast	149	305	33%	454	45	160	22%	205

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

Table 14(a): Estimated and Projected Population, 2010 to 2031

SLA/LGA	Estimated Resident Population				
	2011	2016	2021	2026	2031
Bass Coast (S) - Phillip Is.	9,940	10,887	11,897	13,519	14,672
Bass Coast (S) Bal	22,116	24,876	28,139	31,671	35,274
Bass Coast LGA	32,056	35,763	40,037	45,190	49,946

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

Table 14(b): Estimated and Projected Number of Dwellings, 2010 to 2031

SLA/LGA	Structural Private Dwellings				
	2011	2016	2021	2026	2031
Bass Coast (S) - Phillip Is.	10,669	11,912	13,194	14,511	15,828
Bass Coast (S) Bal	13,763	16,144	18,625	21,210	23,803
Bass Coast LGA	24,432	28,056	31,820	35,721	39,630

Source: [former] Department of Planning and Community Development Victoria in Future 2012

Table 14(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
Bass Coast (S) - Phillip Is.	189	202	324	230	237	248	257	263	263	258
Bass Coast (S) Bal	552	653	706	721	658	476	496	517	519	502
Bass Coast LGA	741	855	1031	951	894	725	753	780	782	760

Source: [former] Department of Planning and Community Development Victoria in Future 2012

Table 14(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
Bass Coast (S) - Phillip Is.	1.8%	1.8%	2.6%	1.6%	2.0%	2.2%	2.1%	1.9%	1.8%	2.0%
Bass Coast (S) Bal	2.4%	2.5%	2.4%	2.2%	2.4%	3.2%	2.9%	2.6%	2.3%	2.8%
Bass Coast LGA	2.2%	2.3%	2.5%	2.0%	2.2%	2.8%	2.5%	2.3%	2.1%	2.4%

Source: [former] Department of Planning and Community Development Victoria in Future 2012

LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS –
BASS COAST



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 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.

MAPSONLINE

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

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.

