Urban Development Program

2012

Regional Residential Report

Shire of Baw Baw

State Government Victoria
Department of Transport, Planning and Local Infrastructure

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 Baw Baw.

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 Baw Baw.

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 Baw Baw has averaged 542 per annum.

The vast majority of building approvals (98%) since July 2006 have been separate houses, 1% semi-detached dwellings and 2% units/apartments.

The majority (82% or 444 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Baw Baw – Part B West, this SLA includes the urban areas of Warragul, Drouin and Longwarry.

From July 2006 to March 2012 there was an average annual residential lot construction of 522. The majority (77%) were broadhectare/major infill lots, closely followed by rural residential at 12% and minor infill lot construction 10%.

The majority (40%) of residential lot construction activity was located within the suburb of Drouin, followed by Warragul (35%) and Trafalgar (11%).

Lot construction and residential building approval activity as measured from July 2006 to March 2012 broadly aligns in terms of the identified volume at 522 and 542 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 8,459 (564 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 574 dwellings per annum.

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total (excluding minor infill) there is a residential lot supply of approximately 19,969. This is comprised of:

- 6,648 zoned broadhectare/major infill lots (35% of supply);
- 300 vacant rural residential lots (1% of supply); and
- 13,021 designated future residential lots (63% of supply).

As at December 2009, there was 1,331 minor infill lots identified. Of these lots, 1,106 were sized less than 1,200sqm or 83% of the identified lots.

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 6,648, of which 36% (2,377) is located in Warragul, 35% (2,348 lots) in Drouin and 14% (917 lots) in Trafalgar.

Within the municipal area of Baw Baw, there is an estimated lot potential within Future Residential areas of approximately 13,021.

As at December 2009 across the municipality of Baw Baw there was a total lot stock of rural residential allotments of 1,782. Of this stock, 300 lots were vacant, a lot vacancy rate of 17%.

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 12 years of future demand.

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

- 6 years: Baw Baw (S) - Pt A SLA;
- 15+ years Baw Baw (S) - Pt B East SLA; and
- 11 years: Baw Baw (S) - Pt B West SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy over 15+ years of projected demand across the municipal area.

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:

- 6 years: Baw Baw (S) - Pt A SLA;
- 15+ years Baw Baw (S) - Pt B East SLA; and
- 15+ years: Baw Baw (S) - Pt B West SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy 15+ years of projected demand.

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 Baw Baw. 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 Baw Baw currently has around 12 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 15+ years of additional demand.

Baw Baw Shire Council, in conjunction with the Department of Transport, Planning and Local Infrastructure, is currently preparing a Settlement Management Plan which will help the Council and the community to sustainably manage the growth and development of the Shire over the next 15-30 years; as well as define preferred residential, commercial, industrial and public and community areas.

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 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 MapsOnline 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

There are around 43,000 residents living in the Baw Baw Shire. The main population centres are Warragul, Drouin and Trafalgar with other towns of Longwarry, Yarragon, Darnum, Neerim, Neerim South, Baw Baw Alpine Resort, Walhalla, Erica, Hill End, Willow Grove, Noojee, Jindivick, Thorpdale and Ellinbank.

Baw Baw Shire is 100km south east of Melbourne in West Gippsland. The area has abundant natural features and rural landscapes making the area a popular area for day trippers. The municipality has high quality agricultural land as well as high value conservation and recreation areas including the closest ski fields to Melbourne at Baw Baw Alpine Resort.

Warragul and Drouin are the two largest urban and employment centres. This has been reinforced by a history of rezoning of land on the outskirts of both towns for future urban and low density residential development. The 'Growth Management Strategy and Structure Plans - Warragul and Drouin' identified a need to review the zoning of land for residential purposes in Warragul and Drouin to respond to growth pressures.[1]

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

[1] *Shire of Baw Baw 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 Baw Baw. 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 Baw Baw has averaged 542 per annum. The amount of building approval activity as measured on an annual basis has been consistently increasing since 2006-07, when there were 381 approvals steadily increasing to 690 in 2010-11. As measured at the March Quarter 2012 there was 481 residential dwelling approvals.

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

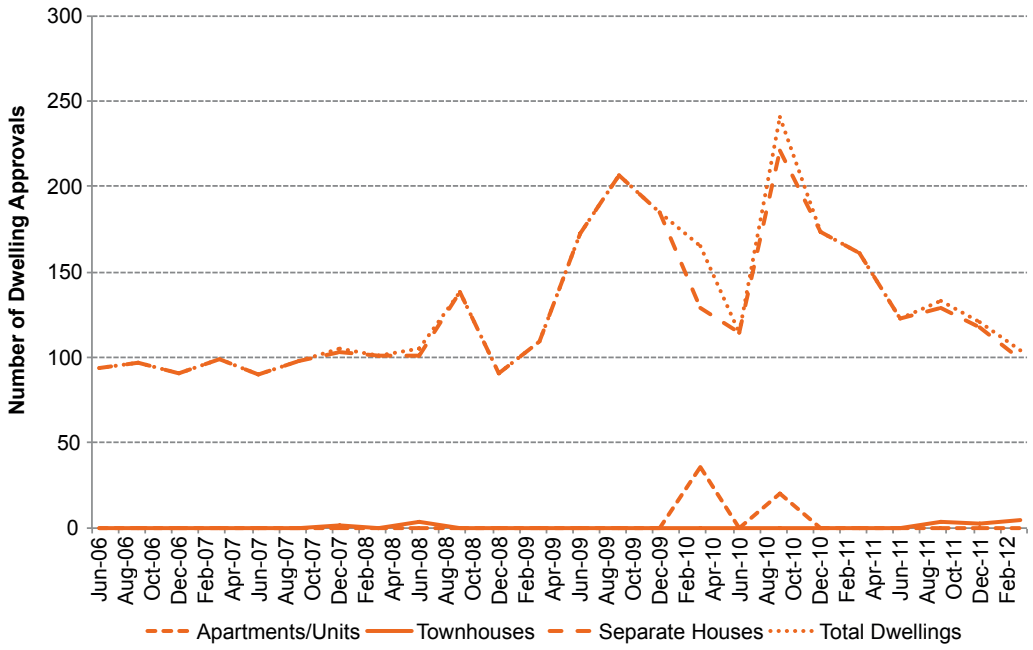
The vast majority of building approvals (98%) since July 2006 have been separate houses, 1% semi-detached dwellings and 2% units/apartments.

The majority (82% or 444 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Baw Baw – Part B West, this SLA includes the urban areas of Warragul, Drouin and Longwarry.

Within the Baw Baw – Part A SLA there was 60 residential dwelling approvals per annum from July 2006 to March 2012, representing 11% of the municipalities total approval activity. The major urban area contained in is Trafalgar.

There was an average of 39 residential building approvals within the SLA of Baw Baw – Part B East, of which the urban centres of Thorpdale and Yarragon area located.

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 Baw Baw. From July 2006 to March 2012 there was an average annual residential lot construction of 522. The majority (77%) were broadhectare/major infill lots, closely followed by rural residential at 12% and minor infill lot construction 10%.

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 248 lots and 'peaked' in 2009-10 at 771 lots. As measured to the March Quarter 2012 there have been 253 residential lots constructed.

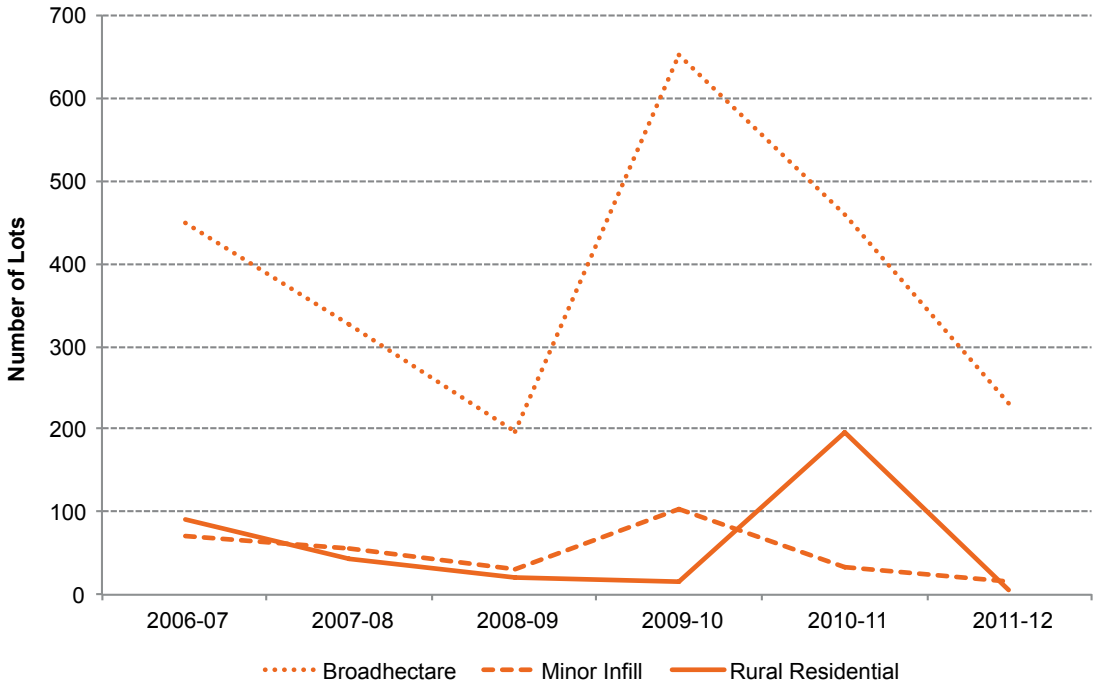
The lot construction variance over-time is a typical trend illustrated from the land development industry and indicates no significant supply or policy issues.

Graph 3 illustrates the average annual volume of all residential lot production by suburb.

The majority (40%) of residential lot construction activity was located within the suburb of Drouin, followed by Warragul (35%) and Trafalgar (11%).

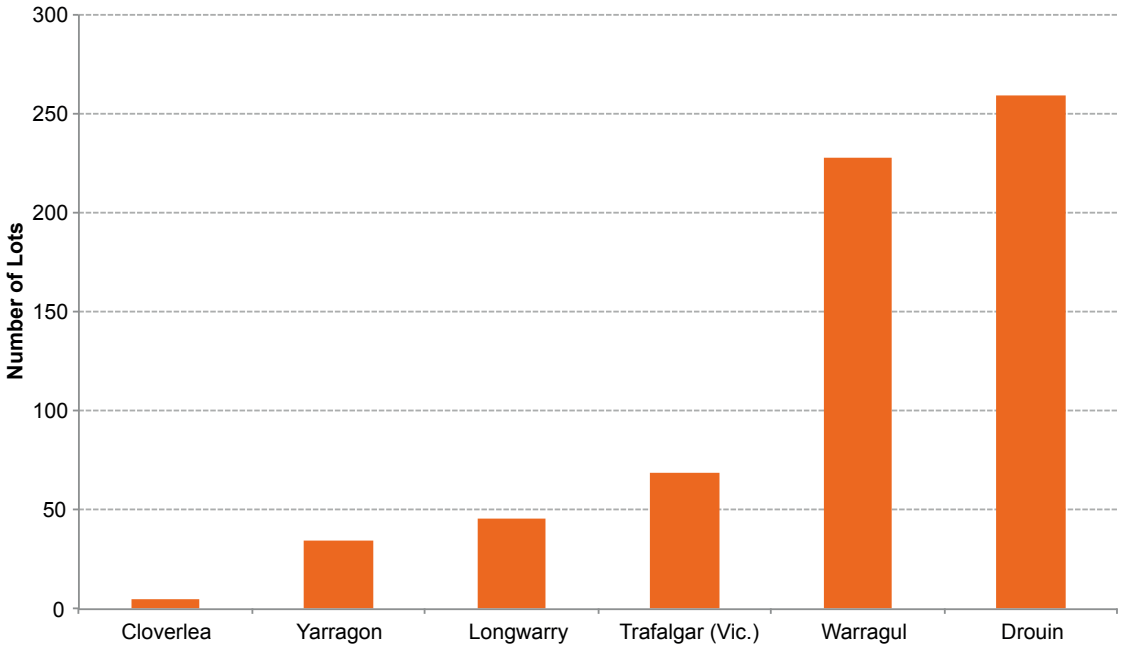
Lot construction and residential building approval activity as measured from July 2006 to March 2012 broadly aligns in terms of the identified volume at 522 and 542 respectively per annum.

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

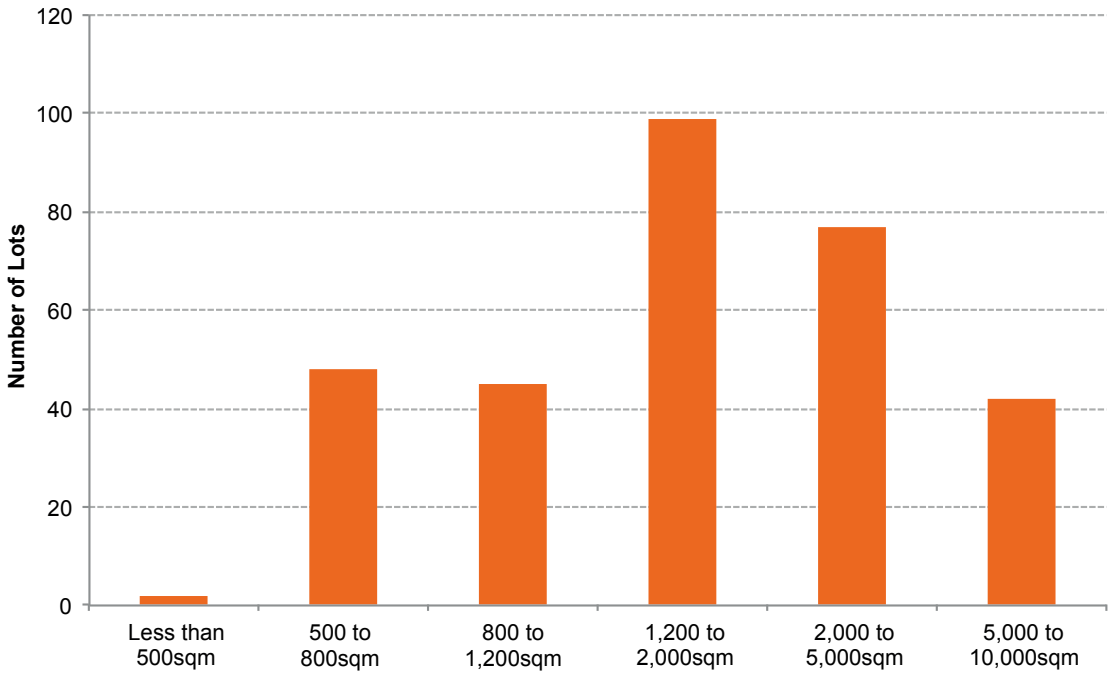
Minor infill lot construction activity as measured from July 2006 to March 2012 across the municipal area of Baw Baw averaged 54 lots per annum. This represents 10% of all residential lot construction activity across the municipal area.

Minor infill lot construction activity was concentrated within the established urban areas of Drouin, Warragul and to a lesser degree Trafalgar.

As measured annually from July 2006 to March 2012, the amount of minor infill lot construction activity has varied significantly. In 2008/09 there were approximately 31 minor infill lots constructed, increasing to 104 in 2009/10 and declining to 34 the following year. As measured to the March Quarter 2012 there have been only 16 minor infill lots constructed.

Of the 313 minor infill lots constructed 30% were constructed on 'parent' lots sized less than 1,200sqm, there were two lots constructed on 'parent lots less than 500sqm. There were 99 lots constructed (32%) 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 Baw Baw averaged 402 lots per annum. This represents 77% of all residential lot construction activity across the municipal area.

Broadhectare lot construction activity was mainly located within the urban areas of Drouin and Warragul.

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 450 broadhectare lots constructed declining to 326 the following year and further declining to 197 lots in 2008-09. Broadhectare lot production rapidly increased to 651 in 2009-10, decreasing to 458 in 2010-11.

As measured to the March Quarter 2012 there have been 232 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 Baw Baw has averaged 65 lots per annum. This represents 12% of all residential lot construction activity across the municipal area.

Of this lot construction activity – 97% was zoned Low Density Residential (LDRZ) and 3% Rural Living (RLZ). The majority of this subdivision activity was located in the suburbs of Warragul and Drouin.

From July 2006 to March 2012 there was an average annual residential lot construction of 522. The majority (77%) were broadhectare/major infill lots, closely followed by rural residential at 12% and minor infill lot construction 10%.

Over the same period residential building approval activity has averaged 542 per annum. The vast majority of building approvals (98%) have been for separate houses

Analysis of the amount of building approvals relative to residential lot construction indicates a functioning residential land market across the municipality of Baw Baw.

5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the municipality of Baw Baw 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 Baw Baw as at March 2012. In total (excluding minor infill) there is a residential lot supply of approximately 19,969. This is comprised of:

- 6,648 zoned broadhectare/major infill lots (35% of supply);
- 300 vacant rural residential lots (1% of supply); and
- 13,021 designated future residential lots (63% 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			
	Broad hectare	Rural Residential	Future (unzoned)	Total Lots
Baw Baw (S) - Pt A	**347**	**9**	**0**	**356**
Tanjil South	0	2	0	**2**
Trafalgar (Vic.)	317	0	0	**317**
Trafalgar East	0	7	0	**7**
Willow Grove	30	0	0	**30**
Baw Baw (S) - Pt B East	**848**	**7**	**0**	**855**
Rawson	0	7	0	**7**
Trafalgar (Vic.)	600	0	0	**600**
Yarragon	248	0	0	**248**
Baw Baw (S) - Pt B West	**5,453**	**284**	**13,021**	**18,758**
Cloverlea	90	1	0	**91**
Darnum	40	0	0	**40**
Drouin	2,348	145	1,000	**3,493**
Drouin East	26	0	0	**26**
Drouin South	0	0	2,191	**2,191**
Jindivick	0	3	0	**3**
Labertouche	0	9	0	**9**
Longwarry	236	0	130	**366**
Neerim	0	24	0	**24**
Neerim South	328	23	0	**351**
Noojee	8	0	0	**8**
Rokeby (Vic.)	0	1	0	**1**
Warragul	2,377	78	9,700	**12,155**
Baw Baw (S)	**6,648**	**300**	**13,021**	**19,969**

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 1,331 minor infill lots identified. Of these lots, 1,106 were sized less than 1,200sqm or 83% of the identified lots. In addition there were:

- 114 vacant lots sized between 1,200 to 2,000sqm;
- 85 lots sized from 2,000sqm to 5,000sqm; and

- 26 lots sized from 5,000 to 10,000sqm.

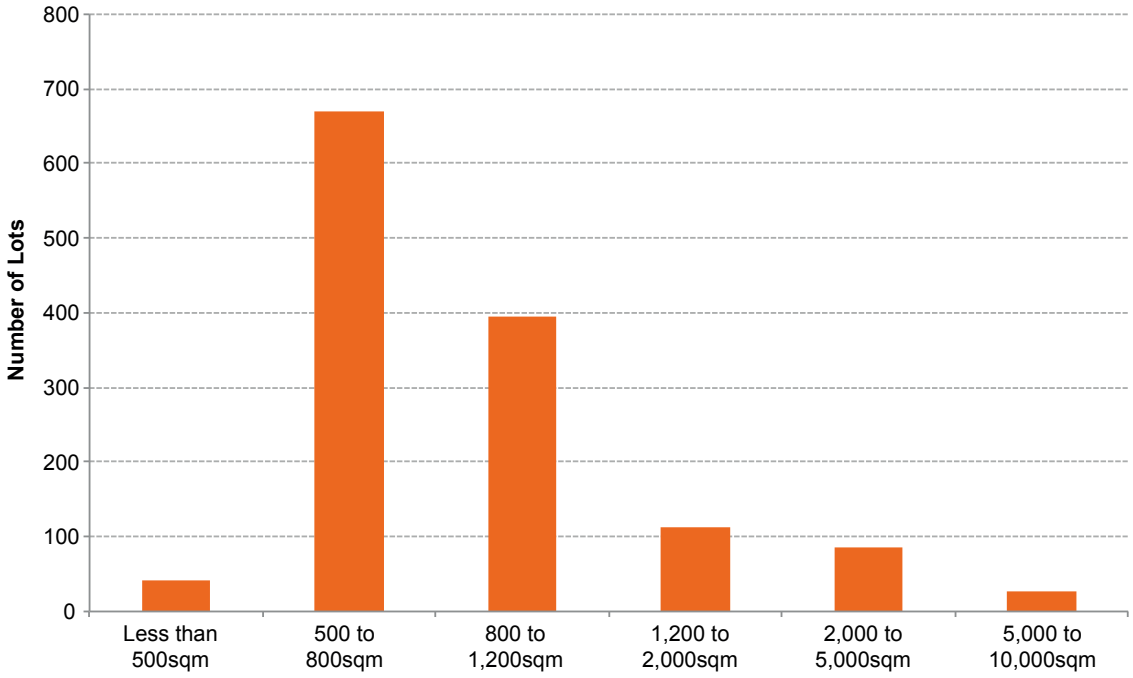
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 10% of lot construction activity across Baw Baw was minor infill, and of this lot construction, 70% was from parent lots sized greater than 1,200sqm.

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

- Drouin – 510 lots;
- Warragul – 371 lots;
- Trafalgar – 124 lots; and
- Longwarry – 85 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 7,310, of which 39% (2,867) is located in Warragul, 34% (2,520 lots) in Drouin and 8% (600 lots) in Trafalgar. 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						Potential Residential (unzoned)	Total Lots (zoned/ un-zoned)
	1-2 years	3-5 years	6-10 years	11+ years	No Timing[2]	Total Zoned Stocks		
Baw Baw (S) - Pt A	231	100	0	0	16	347	0	**347**
Baw Baw (S) - Pt B East	18	80	600	0	150	848	0	**848**
Baw Baw (S) - Pt B West	1,117	1,460	1,302	1,002	572	5453	13,021	**18,474**
Baw Baw (S)	**1,366**	**1,640**	**1,902**	**1,002**	**738**	**6,648**	**13,021**	**19,969**

[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

Broadhectare lot potential (zoned) represents 33% of the total existing residential land supply across the municipal area of Baw Baw.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 601 lots per annum will be constructed within existing zoned broadhectare areas. Recent broadhectare lot construction across the municipality has averaged 402 per annum.

In addition, there is a broadhectare lot potential of 738 lots that no anticipated development timing has been allocated. This stock is located in Drouin (301 lots), Yarragon (150 lots), Cloverlea (90 lots) and Warragul (35 lots).

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 Baw Baw 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 Baw Baw, there is an estimated lot potential within Future Residential areas of approximately 13,021. Of this lot potential:

- 9,700 lots are located in Warragul;
- 2,191 lots are located in Drouin South'
- 1,000 lots are located in Drouin; and
- 130 lots in Longwarry.

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.

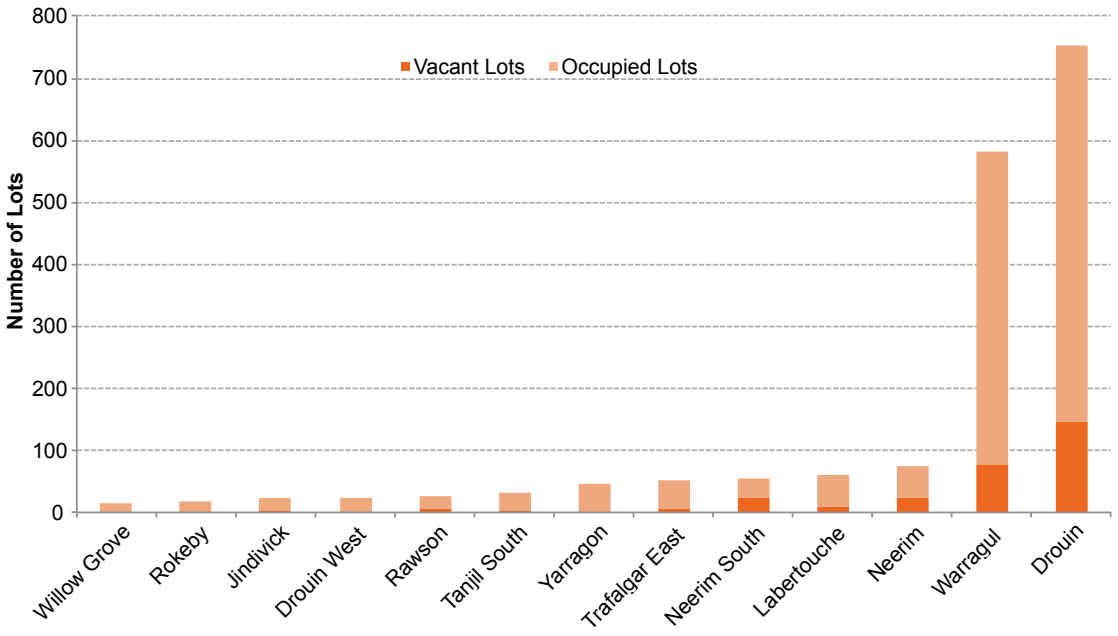
As at December 2009 across the municipality of Baw Baw there was a total lot stock of rural residential allotments of 1,782. Of this stock, 300 lots were vacant, a lot vacancy rate of 17%. Graph 6 summarises the stock of both occupied and vacant rural residential allotments by suburb.

By zone type, as at December 2009 there were 1,452 Low Density Residential (LDRZ) allotments, of which 256 were vacant across the municipality, a lot vacancy of 18%. In comparison, there were a total of 330 Rural Living (RLZ) zoned allotments, of which 44 were vacant – a lot vacancy rate of 13%.

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

- Drouin - total 752 lots (lot vacancy of 19%);
- Warragul - total 582 lots (lot vacancy of 13%);
- Neerim - total 75 lots (lot vacancy of 32%);
- Labertouche - total 61 lots (lot vacancy of 15%);
- Neerim South - total 56 lots (lot vacancy of 41%); and
- Trafalgar East - total 53 lots (lot vacancy of 13%).

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

In total (excluding minor infill) there is a residential lot supply of approximately 19,969. This is comprised of:

6,648 zoned broadhectare/major infill lots (35% of supply);

300 vacant rural residential lots (1% of supply); and

13,021 designated future residential lots (63% of supply).

As at December 2009, there was 1,331 minor infill lots identified. Of these lots, 1,106 were sized less than 1,200sqm or 83% of the identified lots.

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 6,648, of which 36% (2,377) is located in Warragul, 35% (2,348 lots) in Drouin and 14% (917 lots) in Trafalgar.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 663 lots per annum will be constructed within existing zoned broadhectare areas. Recent broadhectare lot construction across the municipality has averaged 402 per annum.

Within the municipal area of Baw Baw, there is an estimated lot potential within Future Residential areas of approximately 13,021.

As at December 2009 across the municipality of Baw Baw there was a total lot stock of rural residential allotments of 1,782. Of this stock, 300 lots were vacant, a lot vacancy rate of 17%.

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 Baw Baw. 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 8,459 (564 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 533;
- 2016 to 2021 - 577; and
- 2021 to 2026 - 582.

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

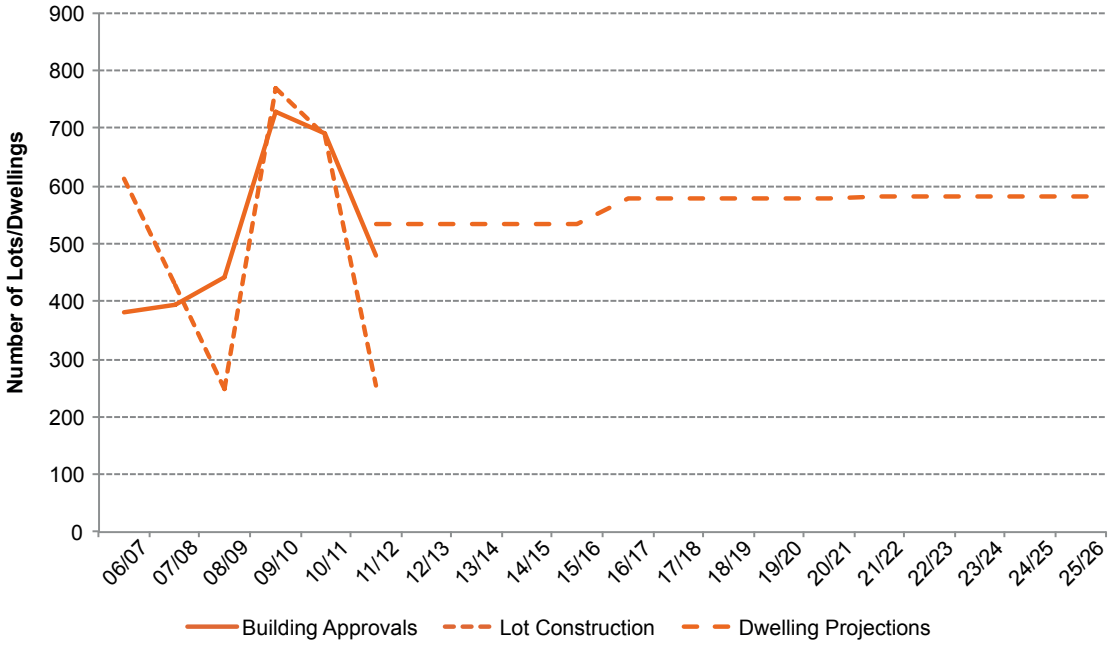
- Part A: 57 dwellings per annum (e.g. Trafalgar);
- Part B East: 40 dwellings per annum (e.g. Yarragon); and
- Part B West: 467 dwellings per annum (e.g. Drouin, Warragul, Longwarry).

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 - 542;
- 2016 to 2021 - 587; and
- 2021 to 2026 - 593.

This growth scenario results in a 2% (153 dwellings) increase 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 8,459 (564 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 533;
- 2016 to 2021 - 577; and
- 2021 to 2026 - 582.

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 - 542;
- 2016 to 2021 - 587; and
- 2021 to 2026 - 593.

This growth scenario results in a 2% (153 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 2006 to March 2012) lot construction activity it is estimated that within the Baw Baw (S) - Pt A SLA 86% of dwelling requirements were for broadhectare/ major infill allotments, 94% within the Baw Baw (S) - Pt B East SLA and 77% within the Baw Baw (S) - Pt B West 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 12 years of future demand.

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

- 6 years: Baw Baw (S) - Pt A SLA;
- 12 years Baw Baw (S) - Pt B East SLA; and
- 11 years: Baw Baw (S) - Pt B West SLA.

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

- 0 years: Baw Baw (S) - Pt A SLA (no identified future land stocks);
- 0 years Baw Baw (S) - Pt B East SLA (no identified future land stocks); and
- 12 years: Baw Baw (S) - Pt B West 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:

- 6 years: Baw Baw (S) - Pt A SLA;
- 12 years Baw Baw (S) - Pt B East SLA; and
- 12 years: Baw Baw (S) - Pt B West SLA.

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

- 0 years: Baw Baw (S) - Pt A SLA (no identified future land stocks);
- 0 years Baw Baw (S) - Pt B East SLA (no identified future land stocks); and
- 15+ years: Baw Baw (S) - Pt B West 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
Baw Baw (S) - Pt A	6	0	**6**	6	0	**6**
Baw Baw (S) - Pt B East	15+	0	**15+**	15+	0	**15+**
Baw Baw (S) - Pt B West	11	15+	**15+**	15+	15+	**15+**
Baw Baw (S)	**12**	**15+**	**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
Baw Baw (S) - Pt A	**3**	**12**	**6**	**15**	**8**	**2**	**8**
Trafalgar (Vic.)	3	12	6	14	7	2	**8**
Trafalgar East	0	0	0	1	0	0	**0**
Willow Grove	0	0	0	0	1	0	**0**
Baw Baw (S) - Pt B East	2	2	0	3	1	0	**1**
Thorpdale	0	2	0	3	0	0	**1**
Yarragon	2	0	0	0	1	0	**1**
Baw Baw (S) - Pt B West	**66**	**43**	**25**	**86**	**25**	**14**	**45**
Buln Buln	3	0	0	2	1	0	**1**
Darnum	0	1	0	3	0	0	**1**
Drouin	25	16	11	32	19	5	**19**
Drouin East	1	0	0	0	0	1	**0**
Longwarry	3	11	3	5	0	3	**4**
Neerim South	0	1	0	0	0	0	**0**
Nilma	1	0	0	0	0	0	**0**
Noojee	1	0	0	2	0	0	**1**
Rokeby (Vic.)	0	2	0	0	0	0	**0**
Warragul	32	12	11	42	5	5	**19**
Baw Baw (S)	**71**	**57**	**31**	**104**	**34**	**16**	**54**

[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
Baw Baw (S) - Pt A	**0**	**6**	**6**	**5**	**13**	**16**
Trafalgar (Vic.)	0	6	6	5	11	16
Trafalgar East	0	0	0	0	1	0
Willow Grove	0	0	0	0	1	0
Baw Baw (S) - Pt B East	**0**	**2**	**0**	**4**	**2**	**0**
Thorpdale	0	0	0	3	2	0
Yarragon	0	2	0	1	0	0
Baw Baw (S) - Pt B West	**2**	**40**	**39**	**90**	**62**	**26**
Buln Buln	0	0	0	0	1	5
Darnum	0	0	0	2	1	1
Drouin	2	12	25	29	35	5
Drouin East	0	0	0	1	0	1
Longwarry	0	0	0	5	13	7
Neerim South	0	0	0	0	0	1
Nilma	0	0	0	0	0	1
Noojee	0	0	0	1	2	0
Rokeby (Vic.)	0	0	0	0	0	2
Warragul	0	28	14	52	10	3
Baw Baw (S)	**2**	**48**	**45**	**99**	**77**	**42**

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
Baw Baw (S) - Pt A	**60**	**82**	**0**	**39**	**0**	**0**	**31**
Trafalgar (Vic.)	60	82	0	39	0	0	**31**
Baw Baw (S) - Pt B East	**20**	**94**	**0**	**34**	**24**	**0**	**30**
Yarragon	20	94	0	34	24	0	**30**
Baw Baw (S) - Pt B West	**370**	**150**	**197**	**578**	**434**	**232**	**341**
Cloverlea	0	0	25	0	0	0	**4**
Drouin	184	40	133	333	141	87	**160**
Longwarry	10	46	19	117	0	0	**33**
Neerim South	0	0	0	0	0	6	**1**
Warragul	176	64	20	128	293	139	**143**
Baw Baw (S)	**450**	**326**	**197**	**651**	**458**	**232**	**402**

[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]
Baw Baw (S) - Pt A	**0**	**1**	**0**	**0**	**4**	**0**
Trafalgar East	0	1	0	0	4	0
Baw Baw (S) - Pt B East	**0**	**2**	**0**	**1**	**0**	**0**
Rawson	0	2	0	1	0	0
Baw Baw (S) - Pt B West	**86**	**41**	**14**	**15**	**190**	**5**
Drouin	63	29	13	15	4	5
Neerim South	9	1	0	0	0	0
Warragul	14	11	1	0	186	0
Baw Baw (S)	**86**	**44**	**14**	**16**	**194**	**5**

[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]
Baw Baw (S) - Pt B West	**4**	**0**	**6**	**0**	**3**	**0**
Neerim	4	0	6	0	3	0
Baw Baw (S)	**4**	**0**	**6**	**0**	**3**	**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
Baw Baw (S) - Pt A	**2**	**61**	**51**	**12**	**10**	**3**	**139**
Erica	0	0	2	2	3	0	**7**
Trafalgar (Vic.)	2	57	47	10	6	2	**124**
Trafalgar East	0	0	1	0	0	1	**2**
Willow Grove	0	4	1	0	1	0	**6**
Baw Baw (S) - Pt B East	**1**	**50**	**46**	**3**	**1**	**1**	**102**
Rawson	0	6	6	1	0	0	**13**
Thorpdale	0	1	8	1	0	0	**10**
Yarragon	1	43	32	1	1	1	**79**
Baw Baw (S) - Pt B West	**39**	**559**	**297**	**99**	**74**	**22**	**1,090**
Buln Buln	0	0	0	0	4	2	**6**
Cloverlea	0	0	0	0	1	0	**1**
Darnum	0	1	8	2	4	1	**16**
Drouin	11	308	135	29	16	11	**510**
Drouin East	0	0	0	0	0	1	**1**
Longwarry	1	56	12	1	13	2	**85**
Neerim South	0	5	32	11	11	2	**61**
Nilma	0	0	0	0	3	0	**3**
Noojee	0	5	9	10	7	2	**33**
Rokeby (Vic.)	0	0	0	0	3	0	**3**
Warragul	27	184	101	46	12	1	**371**
Baw Baw (S)	**42**	**670**	**394**	**114**	**85**	**26**	**1,331**

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							
	1-2 years	3-5 years	6-10 years	11+ years	No Timing[4]	Total Zoned Stocks	Potential Residential (unzoned)	Total Lots (zoned/ un-zoned)
Baw Baw (S) - Pt A	**231**	**100**	**0**	**0**	**16**	**347**	**0**	**347**
Trafalgar (Vic.)	201	100	0	0	16	**317**	0	**317**
Willow Grove	30	0	0	0	0	**30**	0	**30**
Baw Baw (S) - Pt B East	**18**	**80**	**600**	**0**	**150**	**848**	**0**	**848**
Trafalgar (Vic.)	0	0	600	0	0	**600**	0	**600**
Yarragon	18	80	0	0	150	**248**	0	**248**
Baw Baw (S) - Pt B West	**1,117**	**1,460**	**1,302**	**1,002**	**572**	**5,453**	**13,021**	**18,474**
Cloverlea	0	0	0	0	90	**90**	0	**90**
Darnum	0	0	0	0	40	**40**	0	**40**
Drouin	498	445	784	320	301	**2,348**	1,000	**3,348**
Drouin East	0	0	0	0	26	**26**	0	**26**
Drouin South	0	0	0	0	0	**0**	2,191	**2,191**
Longwarry	110	60	0	0	66	**236**	130	**366**
Neerim South	11	15	20	282	0	**328**	0	**328**
Noojee	0	0	0	0	8	**8**	0	**8**
Warragul	498	940	498	400	41	**2,377**	9,700	**12,077**
Baw Baw (S)	**1,366**	**1,640**	**1,902**	**1,002**	**738**	**6,648**	**13,021**	**19,669**

[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*: 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
Baw Baw (S) - Pt A	**7**	**47**	**13%**	**54**	**2**	**46**	**4%**	**48**
Tanjil South	0	0	0	**0**	2	31	6%	**33**
Trafalgar East	7	46	13%	**53**	0	0	0	**0**
Willow Grove	0	1	0%	**1**	0	15	0%	**15**
Baw Baw (S) - Pt B East	**7**	**18**	**28%**	**25**	**0**	**56**	**0%**	**56**
Hill End (Vic.)	0	0	0%	**0**	0	9	0%	**9**
Rawson	7	18	28%	**25**	0	0	0%	**0**
Yarragon	0	0	0%	**0**	0	46	0%	**46**
Yarragon South	0	0	0%	**0**	0	1	0%	**1**
Baw Baw (S) - Pt B West	**242**	**1131**	**18%**	**1373**	**42**	**184**	**19%**	**226**
Buln Buln	0	0	0	**0**	0	9	0%	**9**
Cloverlea	1	0	100%	**1**	0	0	0%	**0**
Drouin	143	594	19%	**737**	2	13	13%	**15**
Drouin West	0	0	0%	**0**	0	23	0%	**23**
Jindivick	0	0	0%	**0**	3	19	14%	**22**
Labertouche	0	0	0%	**0**	9	52	15%	**61**
Longwarry	0	1	0%	**1**	0	0	0%	**0**
Neerim	0	0	0%	**0**	24	51	32%	**75**
Neerim South	20	32	38%	**52**	3	1	75%	**4**
Rokeby (Vic.)	0	0	0%	**0**	1	16	6%	**17**
Warragul	78	504	13%	**582**	0	0	0%	**0**
Baw Baw	**256**	**1196**	**18%**	**1452**	**44**	**286**	**13%**	**330**

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

Table 12(a)*: Estimated and Projected Population, 2011 to 2031*

SLA/LGA	Estimated Resident Population				
	2011	2016	2021	2026	2031
Baw Baw (S) - Pt A	4,932	5,432	5,917	6,393	6,854
Baw Baw (S) - Pt B East	4,527	4,746	5,058	5,364	5,655
Baw Baw (S) - Pt B West	34,583	38,996	43,464	47,820	52,099
Baw Baw LGA	**44,042**	**49,174**	**54,439**	**59,578**	**64,608**

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

Table 12(b)*: Estimated and Projected Number of Dwellings, 2011 to 2031*

SLA/LGA	Structural Private Dwellings				
	2011	2016	2021	2026	2031
Baw Baw (S) - Pt A	2,210	2,481	2,774	3,071	3,364
Baw Baw (S) - Pt B East	2,046	2,219	2,429	2,642	2,851
Baw Baw (S) - Pt B West	14,206	16,429	18,809	21,209	23,616
Baw Baw LGA	**18,463**	**21,128**	**24,012**	**26,922**	**29,831**

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

Table 12(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
Baw Baw (S) - Pt A	100	97	95	92	96	54	59	59	59	58
Baw Baw (S) - Pt B East	44	62	61	58	56	35	42	43	42	40
Baw Baw (S) - Pt B West	883	894	871	856	876	445	476	480	481	471
Baw Baw LGA	**1026**	**1053**	**1028**	**1006**	**1028**	**533**	**577**	**582**	**582**	**568**

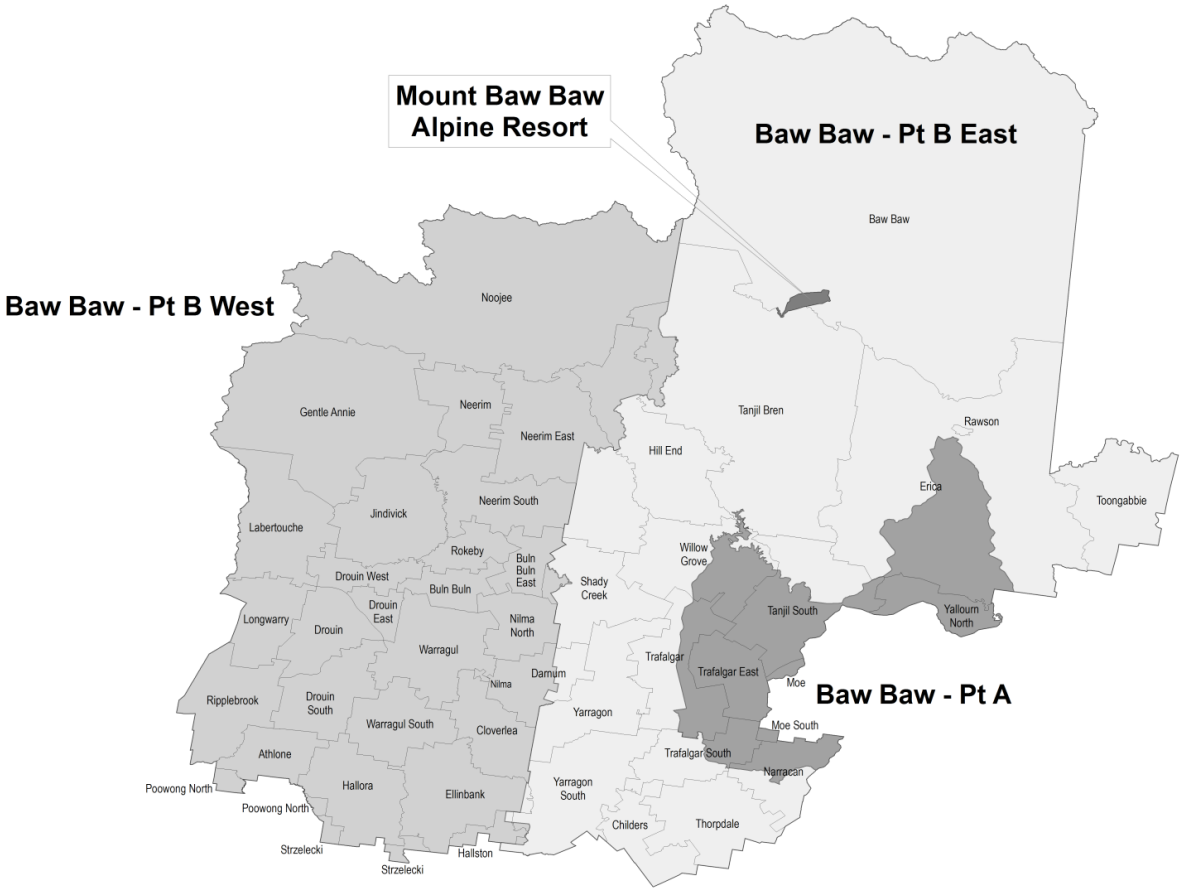
Source: (former) Department of Planning and Community Development Victoria in Future 2012

Table 12(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
Baw Baw (S) - Pt A	2.0%	1.7%	1.6%	1.4%	1.7%	2.3%	2.3%	2.1%	1.8%	2.1%
Baw Baw (S) - Pt B East	0.9%	1.3%	1.2%	1.1%	1.1%	1.6%	1.8%	1.7%	1.5%	1.7%
Baw Baw (S) - Pt B West	2.4%	2.2%	1.9%	1.7%	2.1%	2.9%	2.7%	2.4%	2.2%	2.6%
Baw Baw LGA	**2.2%**	**2.1%**	**1.8%**	**1.6%**	**1.9%**	**2.7%**	**2.6%**	**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 – BAW BAW



GLOSSARY OF TERMS

BROADHECTARE LAND

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

CONSTRUCTED LOT

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

DWELLING

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

FUTURE RESIDENTIAL LAND

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

FUTURE RURAL RESIDENTIAL LAND

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

LOCAL GOVERNMENT AREA (LGA)

A geographical area that is administered by a local council.

LOT

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

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.