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ShapingSEQ 2023 Background Paper 1: Grow Theme

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List of acronyms

ABS	Australian Bureau of Statistics
ADM	Advanced Demographic Modelling
AHURI	Australian Housing and Urban Research Institute
ASGS	Australian Statistical Geography Standard
BAF	Building Acceleration Fund
BTR	Build to Rent
CWISP	Caboolture West Interim Structure Plan
EUA	Existing Urban Area
FFM	Financial Feasibility Model
GAF	Growth Acceleration Fund
GMP	Growth Monitoring Program
HHAP	Housing and Homelessness Action Plan 2021-2025
HIF	Housing Investment Fund
HSEP	Housing Supply Expert Panel
LGA	Local Government Area
LGIP	Local Government Infrastructure Plan
LSDM	Land Supply and Development Monitoring
MRAC	Major Regional Activity Centre
MULTI	Model for Urban Land Use and Transport Interaction
NIUB	Northern Inter-Urban Break
PDA	Priority Development Area
PFGA	Potential Future Growth Area
PRAC	Principal Regional Activity Centre
QAO	Queensland Audit Office
QLUAD	Queensland Land Use and Activity Database
RGCP	Regional Growth Corridor Plan
RLA	Rural Living Area
RLRPA	Regional Landscape and Rural Production Area
RLUC	Regional Land Use Categories
RPS	Regional Planning Committee
RSI	Region-shaping infrastructure
RTP	Regional Transport Plan
SDA	State Development Area
SEIFA	Socio-Economic Indexes for Areas
SEQ	South East Queensland
SEQDA	South East Queensland Development Area
SEQIS	South East Queensland Infrastructure Supplement
SPP	State Planning Policy
STM	Strategic Transport Model
TMR	Department of Transport and Main Roads
UN SDGs	United Nations Sustainable Development Goals
UUF	Underutilised Urban Footprint

Introduction

The South East Queensland Regional Plan, ShapingSEQ is the strategic land use plan for South East Queensland (SEQ), providing a regional framework for growth management. ShapingSEQ 2017 identified that an update of the plan was anticipated between 2022 and 2024. On 20 October 2022, the former Premier and Minister for the Olympic and Paralympic Games, the Honourable Annastacia Palaszczuk, committed to a review of ShapingSEQ 2017 as a key outcome from the Queensland Housing Summit, and ShapingSEQ 2023 was publicly released in December 2023.

The primary purpose of the review of ShapingSEQ was to ensure its land and housing supply settings are fit for purpose and responsive to current growth, and to provide for an enhanced framework to engage with local governments to accelerate delivery of more housing.

The scope of the review of ShapingSEQ was therefore limited to four focus areas including: housing supply and diversity; economic centres and jobs; policy and infrastructure alignment; and implementation assurance. Of relevance to Grow, the scope was limited to:

- Updating population and dwelling forecasts to inform housing supply requirements.
- Undertaking appropriate Urban Footprint changes to provide realistic and updated understanding in support of housing supply requirements.
- Reviewing the approach to housing supply and diversity for future needs.
- Providing new dwelling supply benchmarks to provide for needed housing.
- Developing short- and long-term housing responses to address Queensland Housing Summit and National Housing Accord actions and requirements and accommodate sustained growth.

The purpose of this paper is to identify key data, policy, legislation, trends and other evidence that informed the review of the Grow theme. It supports and provides background material for ShapingSEQ 2023 including key strategies under the Grow theme.

The role of ShapingSEQ

Regional planning in Queensland and South East Queensland (SEQ) has been conducted since the 1990s, and originally provided non-statutory growth management policies for consideration. Statutory regional plans have since evolved to support the changing needs and aspirations of Queensland's regions and are now comprehensive statutory policy documents informed by detailed data modelling and with statutory mechanisms for policy implementation and review.

ShapingSEQ sets planning direction for sustainable growth, global economic competitiveness and high-quality living. The regional plan responds to the region's projected growth, and the opportunities and challenges associated with current and projected trends.

It guides the future of the SEQ region, encompassing the 12 local government areas (LGAs) of Brisbane, Gold Coast, Ipswich, Lockyer Valley, Logan, Moreton Bay, Noosa, Redland, Scenic Rim, Somerset, Sunshine Coast and, Toowoomba (urban extent).

ShapingSEQ allocates all land in SEQ into one of three regional land use categories: Urban Footprint, Rural Living Area (RLA) and the Regional Landscape and Rural Production Area (RLRPA). In doing so, it provides a framework for delivering efficient urban and rural residential growth, a more compact urban form, economic agglomeration, and the protection and sustainable use of SEQ's natural assets, landscape and productive rural areas.

ShapingSEQ provides a framework of outcomes and strategies that support effective and sustainable regional planning and growth management. These include:

» Geographically defined consolidation areas in relation to growth management (Urban Footprint).
» Regional integration of governance that drives the relationship between policy direction and stakeholders and identifies goals, principles and stakeholder responsibilities in addressing these.
» Infrastructure and economic development linked to the regional distribution of population and residential growth.

» Protection of broader landscape values, services and amenities of natural, rural and agricultural production landscapes.
» Prescribing ongoing monitoring and benchmarking of growth, development forms, land supply and the Urban Footprint.

ShapingSEQ 2023 is a part of the Queensland Government's response to the National Housing Accord and National Planning Reform Blueprint. The plan has a critical role to play in setting effective and responsive policies that facilitate the delivery of diverse and well-located homes to meet the housing needs of South East Queenslanders today and into the future.

In response to projected population growth to 2046 ShapingSEQ 2023 sets dwelling supply targets and diversity sub-targets for each LGA as well as a region wide social and affordable housing sub-target. The place-based allocation of dwelling targets with sub-targets for housing mix in each LGA is a nation-leading approach with the purpose of setting clear expectations around how SEQ will sustainably accommodate the projected population growth to 2046. This will assist in delivering on the State's commitment to the National Housing Accord target of 1.2 million well-located homes.

Implementing ShapingSEQ 2023 will require ongoing collaboration, commitment and coordination across all levels of government, First Nations peoples, the industry and the community. Each stakeholder has a role to play in responding to the current housing challenges experienced across SEQ and the overall achievement of the longer-term vision for SEQ. To guide this collaboration and provide greater assurance to all stakeholders and the community on the delivery of ShapingSEQ 2023, a new approach to implementation, governance, monitoring and reporting has been established.

ShapingSEQ 2023 maintains the fundamental elements of ShapingSEQ 2017, including the five themes underpinning the 50-year vision for SEQ: Grow, Prosper, Connect, Sustain and Live.

Grow theme defined

Our urban environment is complex and is continuing to experience change and transition. These changes have important implications on social, economic and environmental functioning and sustainability of our cities, towns and environments. SEQ is continuing to experience population growth, and while this growth was broadly anticipated, the characteristics and impacts of this growth were not holistically addressed.

A global pandemic, urbanisation, a shifting focus on climate resilience and betterment and the de-centralised nature of our regions requires innovative and efficient policy responses that address matters in the regional context. Specifically, ShapingSEQ 2023 seeks to directly respond to the current housing challenges, and reflect new and emerging priorities influencing the growth narrative in SEQ. It responds to the region's projected growth to 2046, having regard to the opportunities and challenges for maintaining and enhancing the region's sustainability, global competitiveness and high-quality living opportunities. It sets the long-term vision for the region which is supported by strategies and actions to deliver on the vision.

The ShapingSEQ Grow theme addresses the opportunities and challenges of growth through the consideration of the preferred pattern of growth to best manage land use change and projected population shifts at a regional scale across SEQ.

ShapingSEQ 2017: Achievements from the last five years

ShapingSEQ 2017 has provided opportunities for sustainable growth management and helped shape a successful future in several ways. A number of implementation actions have been successfully delivered including the following:

» **Growth Monitoring Program (GMP):** The GMP was established as an implementation action of ShapingSEQ 2017 to provide clear evidence to monitor land supply and development in consultation with local government and industry experts. GMP is tasked with improving access to research and insights through modelling, spatial analytics and visualisation to answer questions related to regional growth performance and sustainability and publishing the annual Land Supply and Development Monitoring (LSDM) report.

» **Regional Transport Plans**: Department of Transport and Main Roads (TMR) engaged with key stakeholders, Queensland Government planning agencies and local governments across SEQ to develop the SEQ Regional Transport Plans (RTPs). The SEQ RTPs were released in March 2021 and is currently under review following the release of ShapingSEQ 2023.

» **Density and Diversity Done Well competition**: The Density and Diversity Done Well competition was held from May to July 2017 and received 100 submissions from across Australia. The outcomes of the competition demonstrate that a diverse range of secondary and primary housing forms are possible to address the 'missing middle' and is used to inform government policy moving forward.

» **QDesign**: The Office of the Queensland Government Architect was encouraged to work with the department and other key stakeholders to implement QDesign and QCompanion. QDesign was released by the previous Minister for Housing and Public Works on 19 December 2018.

» **Unlocking Underutilised Urban Footprint (UUF)**: To support the strategy and guiding principles of the regional plan, a specific implementation action was included in ShapingSEQ 2017 to "investigate and expedite the development of underutilised areas in the Urban Footprint". In response to this implementation action, the department established the UUF project. The department worked with SEQ local governments, infrastructure providers and the development industry to identify and investigate constraints impeding the development of these areas. Across SEQ, 75 UUF areas were identified.

In 2022, the Growth Areas Team (GAT) completed the review of the development capacity of 75 UUF areas identified in ShapingSEQ 2017. This work identified areas that require assistance to 'unlock' land in the short and medium term, while providing up to date information for the ongoing monitoring of land supply availability in the SEQ region. GAT worked to identify the barriers and interventions that may be required to unlock land.

» **'Front loading' new expansion areas – Beerwah East SEQ Development Area:** The department continues to collaborate with Sunshine Coast Council (SCC), infrastructure providers, state agencies and other relevant stakeholders, to identify and resolve where possible state and local planning and infrastructure constraints and opportunities for Beerwah East; and develop a more efficient system of satisfying state regulatory requirements. Planning Group prepared and delivered the Beerwah East Preliminary Evaluation Report (PER), which was endorsed in October 2022. The department is advancing the next stage of investigations for Beerwah East, where under ShapingSEQ 2023, this area has been transitioned to a SEQ Development Area. This work is focused on the actions required to unlock Beerwah East to increase land supply for urban development on the Sunshine Coast.

» **Waraba (formerly Caboolture West):** The department has worked in collaboration with the City of Moreton Bay (CMB) Council, state agencies and stakeholders to develop a process that identifies state planning and infrastructure constraints and opportunities for Waraba; and develop a more efficient system of satisfying state regulatory requirements. An important stage of integrated land use and infrastructure planning for Waraba has been completed with the Queensland Government approving the Caboolture West Interim Structure Plan (CWISP). The CWISP paves the way for fast-tracked assessment of 13,000 new homes across 600 hectares of land earmarked for residential development over the next 15 years.

The Queensland Government has approved $10.5 million of Building Acceleration Fund (BAF) and $15 million of Growth Acceleration Fund (GAF) low interest loan funding to co-fund critical water supply & sewer infrastructure that will unlock the delivery of approximately 2,500 homes in the Waraba Growth Area (also known as Caboolture West). This has been achieved through collaboration between the Queensland Government, Unitywater and industry.

Led by the Queensland Government, in partnership with the CMB Council and in collaboration with the Australian Government, the SEQ City Deal Growth Area Compact will invest $210 million in enabling infrastructure to support the delivery of affordable housing options in the Waraba Growth Area (also known as Caboolture West). The Queensland Government has commenced detailed planning to inform project selection in consultation with the CMB, infrastructure providers and industry.

» **City Deals:** A key implementation action was the delivery of the City Deals' for SEQ under the Australian Government's Smart Cities Plan to transform SEQ's cities into prosperous, knowledge based, innovative, sustainable and connected places. On 21 March 2022, the three levels of government signed the SEQ City Deal, a 20-year program to deliver a $1.8 billion package of 31 investments which will support the fastest growing region in the country, with a focus on accelerating job creation, supporting thriving communities and enhancing the liveability and connectivity of our region. The SEQ Implementation Plan was published in July 2023. The SEQ City Deal Implementation Plan has commenced actioning the delivery of the 29 commitments within the implementation plan. The delivery of ShapingSEQ 2023 relies on other instruments

and funding mechanisms from all three levels of government under existing initiatives such as the SEQ City Deal. ShapingSEQ 2023 works in unison with and leverages the SEQ City Deal and SEQ City Deal Implementation Plan.

» **Northern Inter Urban Break (NIUB):** The department worked with a NIUB reference group between 2017 and 2021 which included state agency and local government representatives from the then Moreton Bay Regional Council and SCC to further define the values and objectives of the NIUB and options for protecting it in the longer-term. This work has informed the cadastral boundary for the NIUB in ShapingSEQ 2023 and is supported by updated regulatory provisions in the Planning Regulation 2017.

» **Urban Footprint:** Another notable success factor is the Urban Footprint growth boundary which has contained urban expansion and sprawl. The Urban Footprint, RLA and RLRPA, and policy narrative provides a tentative guideline in directing further growth and protecting valuable agricultural and employment land. The identification of expansion areas has also assisted the direction of growth to appropriate areas since the adoption of the plan.

» **Referrals:** Under the Planning Regulation 2017, any proposed development is assessed against ShapingSEQ's outcomes, strategies and sub-regional directions. Since 2017, there have been over 200 development applications referred to the department. This occurs when a proposed development is inconsistent with ShapingSEQ and the subsequent SEQ regulatory provisions. The SEQ regulatory provisions ensure the strategies within ShapingSEQ 2023 are delivery through the development assessment process.

The inclusion of an implementation framework as part of ShapingSEQ 2017 has also led to a number of positive projects and outcomes related to regional growth management. This included the establishment of a number of growth management and monitoring bodies including the Housing Supply Expert Panel (HSEP) to provide independent expert advice and the GAT to appropriately manage land supply and associated issues in SEQ. This success is reflected by HSEP's expanded remit from SEQ to state-wide and the critical work involved in the approved structure planning for the pilot UUF site of Waraba.

The continued establishment of the GMP in 2018, which has since publicly released four annual LSDM reports, helps to provide an increasingly valuable evidence base to better inform decisions on infrastructure and land use planning. This included an online dashboard for 'Measures that Matter' that launched to assist planning for the forecast population growth in the region, and annual reporting against regional indicators organised under the plan's five themes, including Grow. This dashboard included indicators reporting on years of supply, dwelling growth (urban consolidation and expansion), housing type (limited typologies) and housing density (monitoring efficient land use).

The current GMP provides a strong foundation for assisting to understand growth, development take-up, baseline diversity and allowed for identifying recommendations for improvement as part of ShapingSEQ 2023.

Grow theme background

Demographic and housing profile

The following section provides an analysis of the demographic and housing characteristics of SEQ. By exploring the demographic trends and housing profile of SEQ, key insights are identified that have guided strategies for sustainable growth, community development, and improved quality of life for the region.

Population

SEQ is one of the fastest growing and urbanised regions in Australia and is the third most populous area in Australia. Around 15% of the Australian population lives in the SEQ region.[1] The estimated population was 3.8 million people (at 2021) out of the state's total population of 5.4 million.[2] The region covers approximately 23,000m²

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[1] Bureau of Communications, Arts and Regional Research (2022). South East Queensland – Population, Housing, Jobs, Connectivity and Liveabilty
[2] Population – National, states and territories – at December 2023. Australian Bureau of Statistics

including the four largest cities in Queensland of Brisbane, Gold Coast, Moreton Bay and the Sunshine Coast. Over the past 20 years, SEQ's population has grown consistently by an average of 2.2% per annum.

There has been a marked shift in population growth in SEQ through COVID-19 with an increase in net interstate migration from 2020-21. As a state, Queensland gained the most people through net interstate migration over this period, with an additional 23,066 people, most from New South Wales and Victoria.[3] Queensland continued to have the most interstate migration of any state or territory, with an additional 32,255 in 2022-2023[2] and is projected to return to its long term trend of 19,000 in 2025-26.[4] Interstate migration will continue to be a main driver of the state's population growth through this period.[4]

Since 2020, COVID-19 and resultant immigration policies has resulted in historic fluctuations in population growth. Between 2020 and 2022, population growth has been driven by record levels of net interstate migration and now increasing international immigration. With the ease of COVID-19 border restrictions, Queensland's net overseas migration increased to 83,990 persons in 2022–23.[5] The same upwards trend was apparent throughout Australia and expected to stay consistent through 2023-24, with a forecast of 375,000 persons, before returning to pre-pandemic levels from 2024-2025.[4] Overseas migration typically adds pressure on the rental demand, rather than home ownership.[6]

In the last two decades, the region has experienced large-scale rural to urban transition together with the intensification of development in existing urban centres. The population of SEQ has continued to be located predominately in urban areas and concentrated along the coast. This trend has continued and as of 2021, the two largest population centres of Brisbane (33%) and Gold Coast (17%) account for just under half of the region's population. As at 2021, the highest percentage of growth in Statistical Area (Level 2) (SA2) for SEQ from 2017 to 2021 were Pimpama South (65.9%) and North (63.6%), Ripley (63.5%) and Yarrabilba (61.7%).

Age Structure

The median age of SEQ residents was 37.9 years in 2022, higher than 2016 (36.6) and lower than the state average of 38.6 years**Error! Bookmark not defined.**. However, an increase in the number of people aged over 65 years of age increasing from 14.4% in 2016 to 16.2% in 2022 was identified the largest increase seen across all age groups in the region[3]. This is projected to increase to 19.6% by 2046.[7]

Across the region, 18.7% of people are aged between 0-14 years, and 65.1% are of working-age population.[3] Ipswich LGA has the highest representation of children, and Noosa has the lowest. Brisbane LGA has the highest percentage of the working-age population, and Noosa LGA has the lowest working-age population. Noosa and Scenic Rim have the highest proportion of the population aged 65 and over in the SEQ region.[3]

Between 2017 and 2022, across the 12 LGAs, the population aged 65 and over has increased more than the other two age groups (0-14 years and 15-64 years). Figure 1 provides the change in ages structure for the five-year cohorts between 2016 and 2021.

[3] Regional Profiles – at December 2023. Queensland Government Statisticians Office (custom region – local governments). ABS 3235.0, Population by Age and Sex, Regions of Australia unpublished data and Queensland Treasury estimates

[4] Centre for Population 2023, Population Statement: National Population Projections, 2022-23 to 2033-34, the Australian Government, Canberra.

[5] Australian Bureau of Statistics. Overseas Migration (cat. no. 1269.0).

[6] Queensland Housing Market Update – at May 2023. Queensland Government Statistician's Office

[7] ShapingSEQ 2023 Population Projections

Figure 1 - Change in Age Structure - Five Year Age Groups - 2017 to 2022
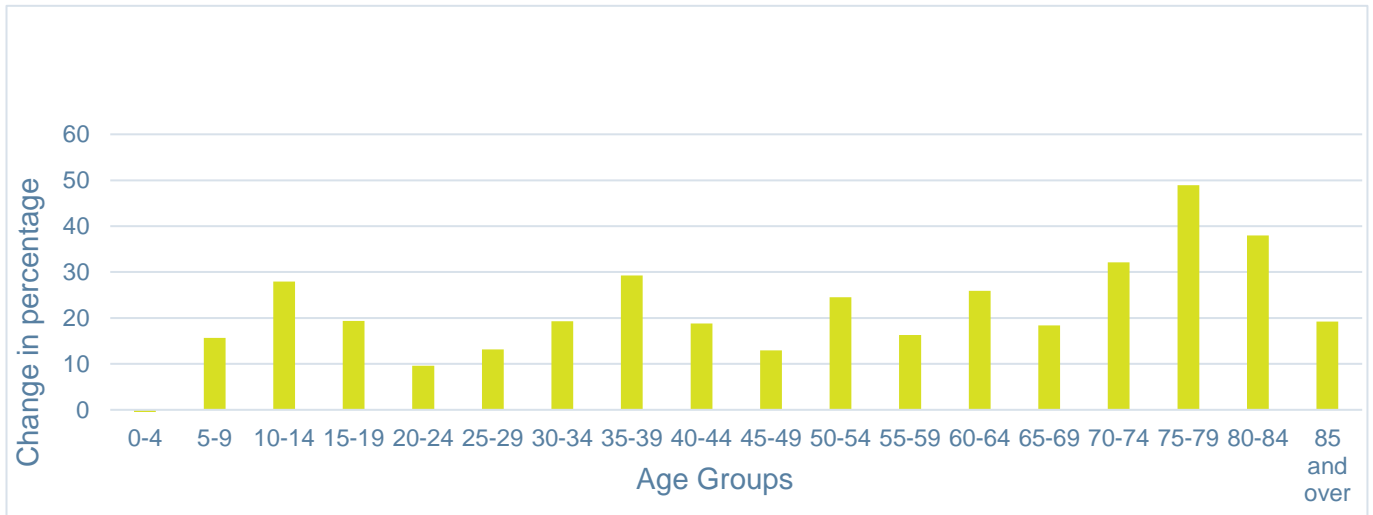
Source: ABS (14 December 2023) Estimated Residential Population

All LGAs in SEQ have experienced an increase of 14% or more in their older age population. Ipswich (26%), Moreton (25.6%) and Redland (24.6%) all show particularly rapid growth in the population aged 65 and over during this period. In contrast, the population of children (under 15 years of age) showed negative growth in Somerset (−9.3%) and Noosa (−2.8% per) between 2017 and 2022.[8] **Error! Bookmark not defined.** The number of children and youth will decrease as a proportion of the overall population from 22.6% in 2021 to 20.5% in 2046.[9]

Gender

The Australian Housing and Urban Research Institute (AHURI) found that women generally experience higher hurdles to accessing housing than their male counterparts.[10] For example, the average affordable rent for women is lower than for men when considering key economic gender indicators such as the current gender pay gap and the median weekly earnings being lower for women than men.[11] The median weekly earnings for a female aged over 55-59 in Australia was $1,172 as at December 2022.

Assuming a typical mortgage (over 30 years with a 20% deposit and 5.37% interest rate which is the average rate in April 2023), a single female aged 55-59 years earning a median wage and wishing to purchase an attached dwelling (unit/flat) in Brisbane would require around 45% of weekly pay to service repayments. For a female aged 60-64 years, she would need 53% of her weekly pay. A single female aged 55-59 years and earning a median wage with a preference to rent a one-bedroom unit/flat would require 34.1% of weekly pay. For a female aged 60-64 years, she would need 40.0% of her weekly pay.[8]

Country of birth, ancestry and language

In 2021, around 26.2% of the SEQ population were born overseas within the region, with Brisbane having the largest number of people born overseas (31.8%), followed by Gold Coast (29.2%) and Logan (27.9%). The top five non-English speaking birthplaces of people within the region are India (1.7%), China (1.4%), Philippines (1.0%), Vietnam (0.6%), and Korea Republic of South (0.5%).

Ethnic and cultural background may influence individuals' preferences for housing and influences the concentration of ethnic groups across the region. There is also evidence that ethnic minority groups are disproportionately affected by homelessness. Housing is also likely to be less affordable for many people from these communities. Overseas migrants and indigenous persons often have a tradition of living with extended family members which significantly affects household size. Analysis of the ancestry responses of the population in SEQ in 2021 shows that the top five ancestries nominated were:

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[8] ABS (2016) Census of Population and Housing

[9] Queensland Regional Profiles – at December 2023. Queensland Government Statistician's Office

[10] Australian Housing and Urban Research Institute (2023). What are the real costs of Australia's housing crisis for women? Retrieved from https://www.ahuri.edu.au/analysis/brief/what-are-real-costs-australias-housing-crisis-women

[11] ABS (2023) Gender indicators. Retrieved from https://www.abs.gov.au/statistics/people/people-and-communities/gender-indicators#gender-pay-gap-measures

- » English (1,434,691 people or 38.2%)
- » Australian (1,208,708 people or 32.2%)
- » Irish (422,434 people or 11.2%)
- » Scottish (389,881 people or 10.4%)
- » German (221,895 people or 5.9%)

A total of 15.6% of people across the region speak a language other than English, with the highest amount of people identified within Brisbane (24%), followed by Logan (18.5%) and Ipswich (14.4%).[12]

First Nations peoples

Approximately 2.9% of Aboriginal and Torres Strait Islander peoples live in SEQ in 2021, presenting a growth of 0.6% since 2016. The largest age group within the region are people aged between 0 – 14 years (33.5%). Of this population, 22.2% of Aboriginal and Torres Strait Islander persons aged 1 year and over were living at a different address one year before Census Night 2021 (higher than the non-Indigenous proportion).

A total of 24.2% of one family households with Aboriginal and/or Torres Strait Islander persons were occupied by one parent families in 2021 compared to 10.6% of non-Indigenous families in SEQ. It was also identified that 5% of Aboriginal and/or Torres Strait Islander peoples within households were multiple families, compared to 1.9% of non-Indigenous families. Less than half of the proportion of Aboriginal and/or Torres Strait Islander peoples (11.6%) owned their dwelling in comparison to non-indigenous people (28.3%) in the region.

Health

Housing safety, stability, quality, and affordability are all deeply connected to health, with unmet housing needs having a direct and deleterious impact. Approximately 28.6% of people within SEQ identified has living with one or more long term health condition, compared to Queensland (28.8%). Somerset LGA had the highest portion of those with an identified long term health condition within the region at 35.7%. At SA4 Level, Moreton Bay – North identified as having 35.8%. The most common health condition for people within the region was mental health issues including depression and anxiety.

A total of 217,949 (or 5.8%) of people within the region identified has a person in need of assistance with a profound or severe disability. Within the region, Somerset (8.3%), Lockyer Valley (7.7%) and Moreton Bay (7.1%) have the highest percentage of persons in need of assistance or with severe disability. [12]

Life expectancy for the Greater Brisbane area is 83.5 with the lowest being 81.9 years in Moreton Bay – North SA4 and 82.6 years in the Toowoomba SA4.

Family composition

The SEQ region currently has just over 1 million families, with 42.6% of total families being couple families with children. Approximately 39.2% of these families also being families with no children, 8.7% higher than the number of younger families with children 15 years and younger. Despite this, fertility rates are increasing, with 45,161 registered births in 2022, at a rate of 11.6 births per 1,000 people.[12]

Within the region, Brisbane (44.9%), Logan (44.9%) and Ipswich (44.8%) had the largest number of couple families with children. Ipswich had the largest percentage of one-parent families with 21.5%, followed by Logan (20.7%) and Moreton Bay (17.9%).

Socio-economic profile

Australian Bureau of Statistics (ABS) utilises the socio-economic indexes for areas (SEFIA) across Australia, showing areas of socio-economic advantage and disadvantage. For the purposes of this report, a review has been undertaken of the IRSAD index for all SEQ LGAs. Variables that this index considers low income, low levels of educational attainment, jobless parents with young children, young people with health issues or disabilities,

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[12] Queensland Regional Profiles – at June 30 (2021). Queensland Government Statistician's Office

unemployment, access to internet and whether their household has a care requirement, single parents, working in low skilled jobs and living in overcrowded households.

Table 1 outlines SEFIA scores across SEQ's LGAs, as well as the portion of the population experience disadvantage or advantage. It is noted in terms of the overall quintile position, number 1 indicates the most disadvantaged, whereas a 5 represents the most advantaged.

Table 1 - IRSAD Index for SEQ LGAs

2021 Local Government Area Name	SEIFA score	Percentage of population in quintile 1 (0 – 20% of values) (most disadvantaged)	Percentage of population in quintile 2 (21 – 40% of values)	Percentage of population in quintile 3 (41 – 60% of values)	Percentage of population in quintile 4 (61 – 80% of values)	Percentage of population in quintile 5 (81 – 100% of values) (least disadvantaged)	Overall quintile position
Brisbane	1,060.7	3.2%	6.1%	13.4%	25.0%	52.3%	5
Gold Coast	1,009.2	6.1%	18.8%	25.2%	30.9%	19.0%	4
Ipswich	940.3	36.8%	24.7%	17.5%	13.8%	7.1%	2
Lockyer Valley	920.8	40.2%	36.3%	19.4%	2.5%	1.6%	1
Logan	929.5	37.6%	25.3%	19.4%	12.1%	5.7%	2
Moreton Bay	969.9	24.7%	24.0%	18.4%	18.1%	14.7%	3
Noosa	1,008.9	3.5%	16.7%	36.6%	25.9%	17.3%	4
Redland	1,003.3	10.5%	16.5%	25.7%	25.3%	22.0%	4
Scenic Rim	958.8	23.2%	16.2%	36.3%	20.8%	3.4%	2
Somerset	912.5	38.2%	43.0%	17.7%	1.1%	0.0%	1
Sunshine Coast	1,000.9	5.4%	19.1%	31.3%	33.7%	10.5%	3
Toowoomba	958.7	26.9%	27.0%	17.9%	18.0%	10.3%	2

Source: ABS (2021) Census of Population and Housing: SEFIA, Australia

Of the LGAs listed in Table 1, Brisbane, Gold Coast, Noosa and Redland's have the highest average advantage scores across the region. The LGAs of Somerset, Lockyer Valley, Scenic Rim, Toowoomba, Logan and Ipswich have the lowest average scores indicating a higher proportion of disadvantaged communities.

Figure 2 demonstrates the level of disadvantage is not concentrated but dispersed throughout the region. Particularly, the mapping shows disadvantaged populations not only reside in the areas that are less accessible by transport infrastructure and essential services, but are also scattered in areas in proximity to transport corridors. This is particularly the case for areas located in the more regional and rural areas of SEQ where there are a limited number of train lines and fewer bus services. However, disadvantage is also identified in areas oriented along transport corridors in areas such as Ipswich and Moreton Bay.

The more advantaged groups tend to agglomerate in the central and inner western area of the Brisbane, scattered across inner suburbs particularly along the Brisbane River, and along the coastline in Redland to the east of Brisbane City.

Further analysis about the connection between age groups, gender and occupational groups and levels of advantage and disadvantage in is included in the following sections.

Figure 2 - Socio-Economic Index (SEIFA) Mapping (IRSAD)
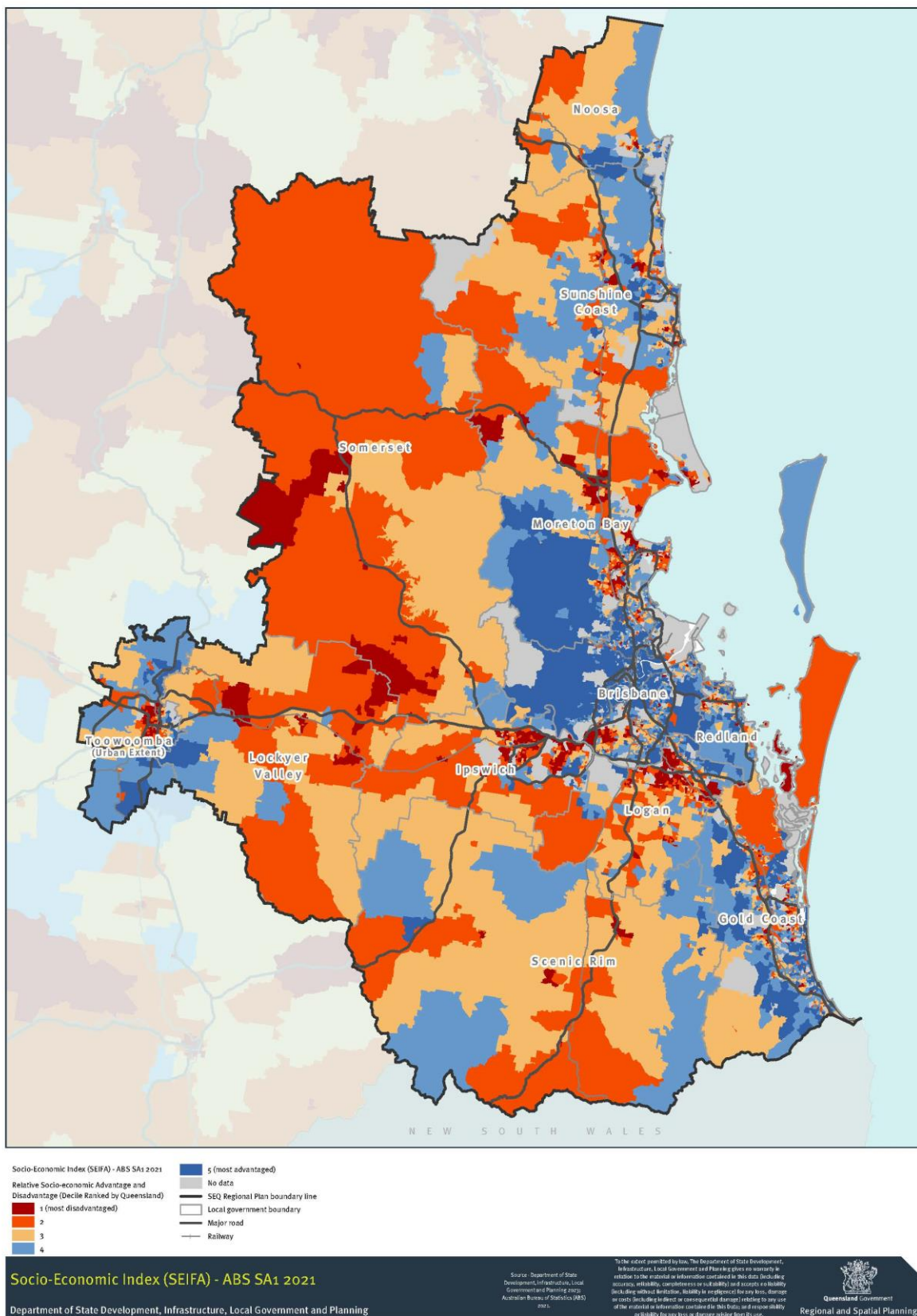
Housing profile

Housing type and supply is a fundamental driver of the current housing challenges, with the population needing housing (type and supply) that meets the users evolving needs throughout their life cycle. People's housing needs change with changes to household composition and age and often directly related to the size of the dwelling. These needs can also be different between households and areas across a region, and are depending on various factors such as employment, cultural background and accessibility.[13]

Household composition

The 2022 SEQ Market Factors Report identified that composition of housing product provided largely does not reflect the product desired by a large portion of the population due to affordability of locations for higher density development and lack of detached dwellings in well-located areas.[14] Currently, the ratio of small households (1-2 persons) to small dwellings (1–2-bedroom households) has increased throughout SEQ between 2016 and 2021 census. This ratio has remained lowest in Brisbane, the Gold Coast, Sunshine Coast and Noosa, indicative of the prevalence of attached dwelling options in these localities.[14]

Household size in Australia has generally declined since the 1970s, but the rate of decline has slowed in recent years. This slowing is likely due to lack of affordable housing opportunities leading to a slowdown in the rate of household formation. This could also be linked to children now choosing not to leave home and an increasing ageing population. Changes in household size over time can also influence the relationship between dwelling approvals and population increases.

This average household size has reduced from 2.8 in 2016 to 2.6 in 2021 across SEQ. There was some notable variation between local governments with Noosa (2.4), Brisbane (2.5), Sunshine Coast (2.5), Gold Coast (2.5) and Toowoomba (2.5) having the lowest household size in the region. Logan recorded the highest size at 2.9 average people per household in 2021.

Table 2 - Household Size (2016 & 2021) Error! Bookmark not defined.

LGA	Household Size	
	2016	**2021**
Brisbane	2.6	2.5
Gold Coast	2.6	2.5
Ipswich	2.8	2.8
Lockyer Valley	2.7	2.7
Logan	2.9	2.9
Moreton Bay	2.7	2.6
Noosa	2.4	2.4
Redland	2.6	2.6
Scenic Rim	2.6	2.6
Somerset	2.6	2.6
Sunshine Coast	2.5	2.5
Toowoomba	2.5	2.5

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[13] Kelly, J., Weidmann, B. & Walsh, M. (2011) *The Housing We'd Choose,* Grattan Institute.
[14] Bull + bear economics (2022) SEQ Market Factors Report. Retrieved from https://planning.statedevelopment.qld.gov.au/planning-framework/plan-making/regional-planning/south-east-queensland-regional-plan/lsdm-report

LGA	Household Size	
SEQ region	2.8	2.6

Source: ABS (2011 & 2016) Census All persons QuickStats

The number of households (i.e. lone, related and unrelated people who live in a dwelling) is also changing, reflecting growth in the adult population as well as shifts in age distribution. For SEQ, the number of lone person households has increased from 21.2% (264,760) to 23.8% (325,023). The number of households has also grown at a faster rate than the population between the 2016 and 2021 Census. The total households grew from 1,261,665 in 2016 to 1,434,318 in 2021, reflecting 14% growth. The total population within SEQ increased by only 12% between 2016 and 2021.

As the population ages, older households will downsize and reduce their housing costs. However, a Queensland Productivity Commission report found that older generations are mostly staying in their family homes rather than downsizing into townhouses and apartments. This is consistent with the Australian Productivity Commission study, which found that older people prefer to age in place and that housing mobility declines with age.[15]

The 2021 Census indicates an increase in the proportion of young adults aged 15 to 24 who are staying on in the family home as either a dependent student or as a non-dependent child. In 2021, 69% of those aged 15 to 24 were living in the family home, up from 64% in 2011. The 2021 Census also shows a fall since 2011 in the proportion of those aged 15 to 24 living independently in group households or choosing to live as a married family. Increasing housing costs, combined with incomes that are around half of those in the 25 to 34 years age group, are very likely the major contributors to these trends.

Housing stock

The lack of diversity in housing types across the region is one of the fundamental drivers of the current housing pressures, with SEQ's population not having appropriate housing that meets the evolving needs throughout their lifecycle. People's housing needs and desires change with household composition and age and often directly relate to the size of the dwelling. These needs can vary between different households and areas across a region and depend on various factors such as income, employment, cultural background and accessibility to services and transport.

On average, Australian homes have far more bedrooms than there are people, with the average number of bedrooms per dwelling being higher than the people per households in 2011, 2016 and 2021 across Australia. This apparent mismatch between the number of people within a household and housing size continues to occur and demonstrates a need for more efficient use of existing housing stock.

Analysis of the housing tenure of households of SEQ in 2021 compared to Queensland shows that there was a smaller proportion of households who owned their dwelling (26.8%), the largest proportion of households are purchasing their dwelling (34.1%) and the remaining proportion who were renters (32.5%). The highest proportion owning their home outright was in Noosa (43.7%), Scenic Rim (38.3%) and Somerset (38.2%), which is likely due to a larger number of retirees living in these areas. The highest proportion renting their home was in Ipswich (39.4%), Brisbane (38.3%) and Logan (34.6%).

Although slowly declining, detached houses remain the dominant housing type across SEQ, accounting for 73.4% of all housing stock in SEQ (Greater Brisbane) in 2021 (down from 75.8% in 2011). This is also true for other major capital cities across the Australia as outlined in Table 3. This is also true for other major capital cities across the Australia as outlined in Table 4.

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[15] Australian Productivity Commission (2015) Housing Decision of Older Australians – Productivity Commission Research Paper

Table 3 - Detached Housing (Capital Cities)

City	% of detached dwellings in 2021
Brisbane	73.4%
Sydney	55.8%
Melbourne	67.8%
Adelaide	75%
Perth	77.8%

Source: ABS (2021) Greater Sydney, Melbourne, Adelaide and Perth - Census Quick Stats

The following provides a breakdown of dwelling diversity across each LGA derived from the 2021 Census as classified as detached or attached (low, medium and high). The classification of these dwelling types will be further described in the section outlining the dwelling diversity targets.

Table 4 - Breakdown of Dwelling Type (SEQ) (2021)
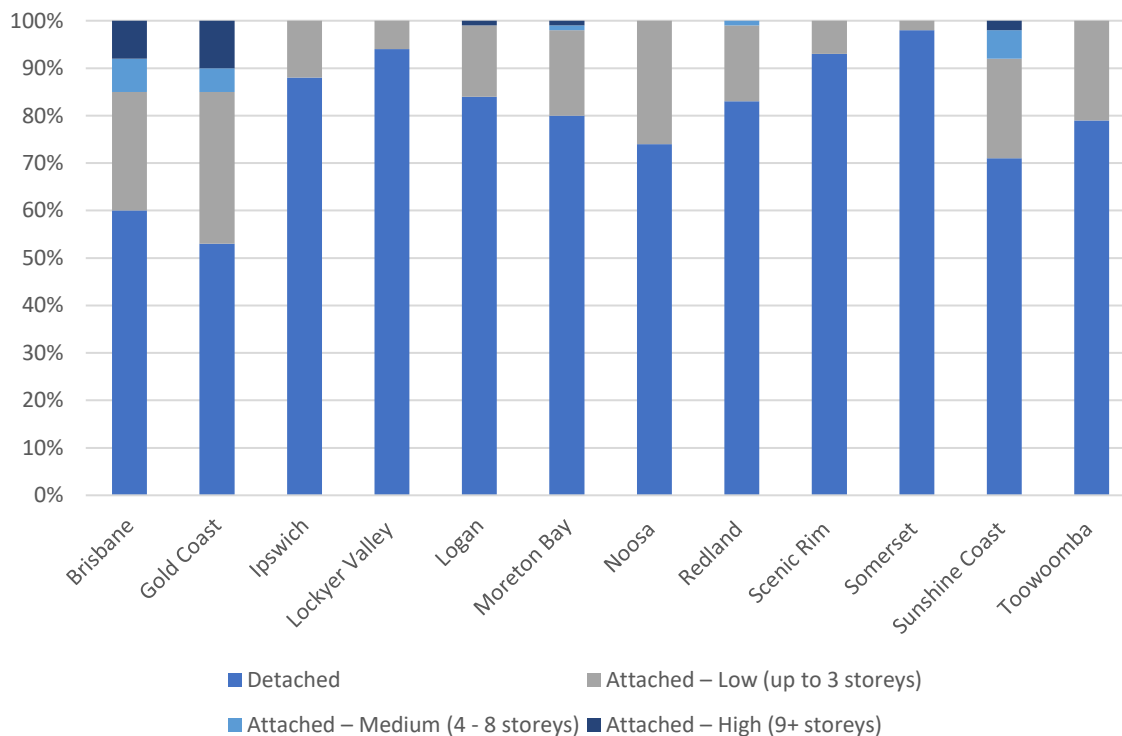
Source: Analysis of ABS 2021 Census data – Dwelling by type at SA2 level. Department of Housing, Local Government, Planning and Public Works (2023).

The highest incidence of detached houses (as a proportion of total housing stock per LGA) is in the more rural parts of SEQ (Somerset, Lockyer Valley and Scenic Rim) followed by the urban fringe LGAs of Ipswich, Logan, Redland and Moreton Bay. Due to necessity, with limited opportunities for expansion land, Brisbane and the City of Gold Coast achieve significantly greater density (attached product) than the rest of the region.

Current research indicates that owning larger houses on large lots is becoming increasingly undesirable with townhouses and apartments of preference for younger people, families and older people.[16] Not all current and future households will be seeking single dwelling houses or multi storey apartments, with a growing need for housing product in between.

Median lot sizes are a housing density indicator that can be used to measure the progress of consolidation policies. The median size of new lots created in SEQ over the 2021/22 period (across both expansion and consolidation areas) was 420 square metres (sqm). Whilst the median size of new lots created in SEQ has decreased from 571sqm to 459sqm since 2012, lot sizes have flattened since 2019/20.

For example, the Greater Capital City areas of Sydney and Brisbane reached average site areas of less than 500 square metres for new houses by 2014, after which site areas trended lower through to 2019 in these cities, before plateauing.

Table 5 – Comparison of median lot sizes in capital cities in Australia

Greater Capital City	Average Site Area (Infill and Greenfield) (2012 & 2021)				
	2012	**2018**	**2019**	**2020**	**2021**
Brisbane	571m^2	459m^2	458m^2	459m^2	459m^2
Sydney	514m^2	444m^2	415m^2	418m^2	423m^2
Melbourne	490m^2	451m^2	447m^2	430m^2	429m^2
Adelaide	498m^2	449m^2	457m^2	453m^2	468m^2
Perth	448m^2	402m^2	402m^2	395m^2	399m^2

Source: ABS (2012 to 2021) Average site area of houses approved, Australian capital cities

Social Housing

Social housing is the collective term for public housing and community housing.

Public housing is long-term housing managed by the Queensland Government. It is for eligible people who are in the highest need of housing assistance and who cannot access any other forms of housing.

Community housing refers to housing assistance delivered by non-government organisations, local governments, and community organisations. It is for eligible people in need of housing assistance, who cannot access other forms of housing.

As of 2021, 2.8% of all dwellings in SEQ were rented through social housing arrangements, which has decreased since 2016 (3.3%). The LGA with the highest percentage of social housing as of 2021 was Logan (3.7%), followed by Brisbane (3.5%) then Ipswich (3.3%).[17]

Housing affordability

The median dwelling price to median household income ratio is often used to monitor changes to housing affordability over time and compare affordability in different areas. Table 6 compares the ratio across 5 Australian capital cities as of 2021, with Sydney being the highest ratio, therefore having the lowest housing affordability of the capital cities. The below uses the ABS Greater Capital City Statistical Areas as the comparative geometry for household income.

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[16] Queensland Productivity Commission (2018). Housing in Queensland: Affordability and Preferences
[17] ABS (2021 & 2016) Census of Population and Housing - Tenure and Landlord Type By Dwelling Structure

Table 6 - Ratio of median dwelling price to median annual household income

	Median dwelling price (2016[18] & 2021)[19]		Median household annual income (2016 & 2021)[20]		Dwelling price to income ratio 2021	
	2016	2021	2016	2021	2016	2021
Sydney	$785,000	$1,090,276	$91,000	$108,004	8.0	10.1
Melbourne	$590,000	$788,484	$80,184	$98,852	7.0	8.0
Brisbane	$470,000	$662,199	$81,224	$96,148	5.7	6.8
Adelaide	$418,000	$558,179	$65,780	$80,496	6.3	6.9
Perth	$480,000	$528,540	$85,436	$96,980	5.8	5.4

Source: CoreLogic (median dwelling prices) and ABS (median household income)

Table 7 suggests a trend in an increase in the dwelling price to household income ratio for each capital city (other than Perth) demonstrating decreasing affordability across the nation. It should be noted that for Greater Brisbane, the ratio was 3.7 in 2001, reached 5.9 in 2011 and fell slightly to 5.8 in 2016.[21]

In 2020, the Sunshine Coast was identified 3rd in the National Cities Performance Framework (2021) least affordable city ranking (dwelling price to income ratio of 8.0), behind Sydney (8.5) and Wollongong (8.3). Gold Coast-Tweed was in 7th place (with a ratio of 7.0) and Brisbane was 10th (5.9). However, Toowoomba was the 3rd most affordable of the included cities, with a dwelling price to income ratio of 4.7.[22]

Mortgage and rental affordability can also be estimated by comparing mortgage or rental repayments to income. Mortgage costs are generally deemed affordable if they make up 30% or less of disposable household income.

The table below provides a breakdown of the percentage of households that were paying 30% or less of their household income on mortgage or rental repayments in 2016 versus 2021 in all the LGAs within SEQ and the region as a whole.

Table 7 – Percentage of households in SEQ LGAs with mortgage and rental payments equal to or less than 30% of household income

	Mortgage Repayments		Rental Repayments	
LGA	**2016**	**2021**	**2016**	**2021**
Brisbane	94%	79%	87%	63%
Gold Coast	92%	72%	83%	49%

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[18] CoreLogic (2016). CoreLogic Hedonic Home Value Index, September 2016 Results. October 3, 2016

[19] CoreLogic (2021). CoreLogic Hedonic Home Value Index. Released 1 December 2021

[20] ABS (2016 & 2021). Census - Greater Capital City Statistical Areas

[21] CoreLogic 2016, *Housing Affordability Report*, December.

[22] Bureau of Infrastructure and Transport Research Economics (BITRE) (2021). National Cities Performance Framework

	Mortgage Repayments		Rental Repayments	
Ipswich	94%	79%	86%	61%
Lockyer Valley	92%	73%	90%	55%
Logan	92%	75%	87%	56%
Moreton Bay	93%	78%	87%	56%
Noosa	92%	68%	87%	44%
Redland	93%	77%	90%	54%
Scenic Rim	92%	72%	90%	49%
Somerset	93%	72%	90%	53%
Sunshine Coast	93%	73%	87%	51%
Toowoomba	95%	78%	89%	61%
SEQ region average	**93%**	**75%**	**88%**	**54%**

Source: ABS (2016 & 2021) - Census All Persons Quick Stats - Local Government Area

These results suggest that mortgage and rental affordability has decreased for households across all LGAs in SEQ. Census data shows that in 2016, 93% of SEQ households had mortgage repayments less than or equal to 30% of household income. This figure dropped to 76% by 2021. For renters in 2016, 86% of households in SEQ had rent payments less than or equal to 30% of household income. This figure dropped to 57% by 2021.

The most pronounced decline in mortgage affordability between 2016 and 2021 was observed in the Noosa LGA. In 2016, 92% of households had mortgage repayments less than or equal to 30% of household income. This figure decreased to 68% by 2021.

The Somerset LGA also experienced a significant decline in mortgage affordability in the period. 72% of households had mortgage repayments less than or equal to 30% of household income in 2021, well below the 93% of households in 2016. Other local governments which experienced significant declines during this period were Scenic Rim, Sunshine Coast, Gold Coast and Lockyer Valley, indicating declining mortgage affordability is dispersed across South-East Queensland.

Like mortgage affordability, rental affordability declined in all LGAs within SEQ between 2016 and 2021, with the most significant decreases in the Noosa, Gold Coast and Scenic Rim LGAs. Less than half of the households renting in Noosa in 2021 had affordable living arrangements (44%, compared to 87% in 2016), followed by Gold Coast (49% in 2021 versus 83% in 2016) and Scenic Rim (49% in 2021 versus).

While the Brisbane LGA recorded the lowest decline in rental affordability between 2016 and 2021 of all LGAs within SEQ, it was still significant. In 2016, 87% of Brisbane LGA households had rent payments less than or equal to 30% of household income, which decreased to 63% by 2021.

At a regional level, the proportion of rental affordability across SEQ has experienced greater decline in comparison to mortgage affordability.

Homelessness and Vacant Housing

Homelessness is a lack of one or more elements that represent 'home'. When a person does not have suitable accommodation alternatives, the ABS defines someone as homeless. This includes people temporarily staying with other households, living in a boarding house or a severely crowd dwelling, having short or non-extendable tenure

or that their dwelling does not allow them control of or access to space for social interactions.[23] This means persons living in larger share houses, with lots of inhabitants where they can't easily utilise communal spaces are classified as homeless. Moreover, those on short-term lease arrangements could also be considered as homeless under ABS definitions.

Toowoomba had the highest rate of homelessness with 50.9 persons per 10,000 people, followed by Logan (49.3) and Ipswich (43.7). Again, these statistics reinforce SEFIA index percentiles for these areas.

Table 9 – Homelessness in SEQ

LGA	People	Rate per 10,000 persons (2021)
Brisbane	4,490	36.2
Gold Coast	1,808	28.8
Ipswich	995	43.7
Lockyer Valley	152	37.5
Logan	1,687	49.3
Moreton Bay	1,424	30.2
Noosa	175	30
Redland	234	14.8
Scenic Rim	86	19.9
Somerset	52	20.8
Sunshine Coast	1,205	35.1
Toowoomba	878	50.9

Source: ABS (2021) Census of Population. Place of Enumeration Profile and Census of Population and Housing

In 2021, Queensland also identified as having the highest proportion of people living in 'severely' overcrowded dwelling (35%) in comparison to other groups as outlined below. This proportion has been maintained since 2016.

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[23] ABS (2012). Information Paper – A Statistical Definition of Homelessness, 2021. Homelessness Statistics

Table 8 – People experiencing homelessness by operational group in Queensland
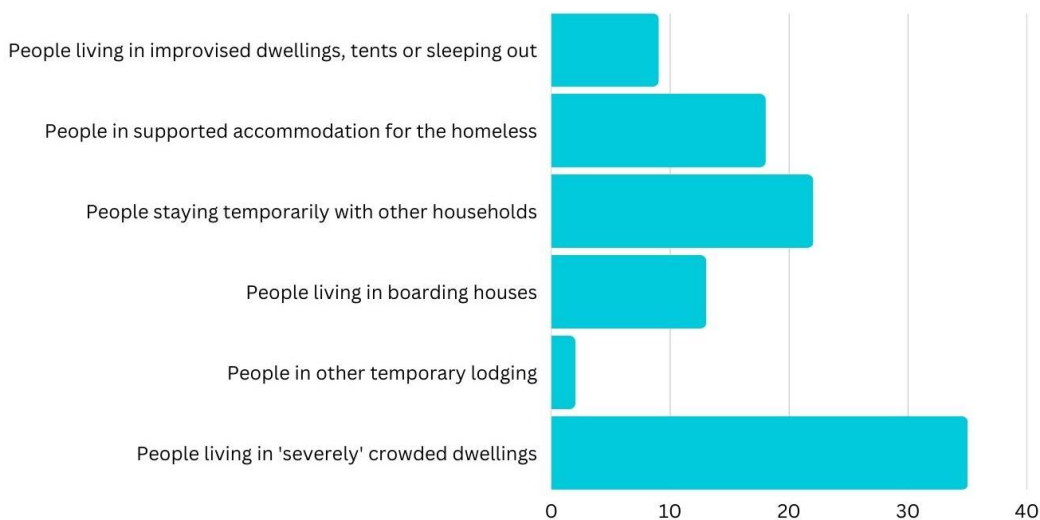
Source: ABS (2021). Census of Population, - Place of Enumeration Profile and Census of Population and Housing

The highest age bracket experiencing homelessness in Queensland in 2021 was between 25 and 34 years old, similar to 2016. Approximately 19% of the total population experiencing homelessness in Queensland were aged over 55 years old in 2021.[24]

AHURI state that just over half (51%) of young people experiencing homelessness aged 12 to 24 years are intermittently living in severely crowded dwellings. This strongly suggests that their homelessness is not the direct result of personal issues such as mental health or drug or alcohol problems but is more likely resulting from systemic problems such as low-income levels and an insufficient quantity of affordable housing.[25]

Access to Basic Amenity at Home

In alignment with the ABS definition for homelessness, those who don't have space or control over areas for social relations are considered as homeless. Examples of this are:

» Inhabitants not being able to use or access a family or small group living space.

» An inability to maintain privacy within their own household.

» Inability to have exclusive access to kitchen facilities or a bathroom.[26]

Generally, inability to access basic amenity at home occurs in households experiencing severe overcrowding. Overcrowded households generally comprise over four or more bedrooms, with ABS reviewing the relationship of persons with each other, their age and sex to determine whether a household is considered as overcrowded. Therefore, a large family home would not be considered as overcrowded or residents not being able to access basic amenity within their home. However, a large share house with limited bathrooms and shared communal space that houses youths would fall within the overcrowded definition.

As noted above, overcrowded households comprise the highest portion of homeless persons in Queensland.

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[24] ABS – Estimating Homelessness (2021 and 2016)

[25] Australian Housing and Urban Research Institute (2023) What are the real costs of the housing crisis for Australia's young people?

[26] ABS (2012). Information Paper – A Statistical Definition of Homelessness, 2021. Homelessness Statistics

Summary

The following key findings were key to informing the strategies and outcomes for the Grow theme in ShapingSEQ.

Dwelling Structure and Composition

A significant mismatch between housing stock and household composition has been identified within the region. For example, couple only households have risen from 38% (2011) to 40.9% (2021) for the Redland local government area. However, the proportion of detached housing at 2021 for Redland was around 83%, representing a discrepancy between the type of housing product available and the likely requirements for emerging household compositions.

There is a need to align dwelling stock more closely with resident needs through diversifying housing stock available for current and future residents.

Affordability

A number of findings point to the need to live affordably, not just housing affordability. Key findings that support this focus include:

» Both detached and attached dwellings are required for different household sizes to support changes in household structures and demographics, and to also allow residents to remain in their local community.

» Additional rental housing stock is required to assist with alleviating decreases in rental affordability across the region – rental affordability is significantly lower than mortgage affordability across SEQ.

» There is a need to invest in affordable, quality homes for Aboriginal and Torres Strait Islander people given their growing proportion of the population and urgent investment required to close the gap. In particular, a focus on youth housing arrangements within the region should be prioritised given it is the largest age group within the region.

There is also clear association between housing stress status and SEIFA.[27] Key considerations include:

» Households in housing stress are likely to be located in areas of lower socio-economic status lacking economic, educational, social and environmental facilities. Therefore, where people live and the opportunities for transport accessibility, journey to work, and access to quality services and amenities desired by households heavily influenced the strategies under the Grow theme.

» The LGAs of Somerset, Lockyer Valley, Scenic Rim, Toowoomba, Logan and Ipswich experience the lowest average SEIFA scores and therefore in general have a higher proportion of disadvantaged communities.

» A greater focus is needed on our disadvantaged areas, those paying more than 30% in mortgage and rental repayments and people experiencing homelessness tend to be located within areas such as Ipswich and Logan. Moreover, these are the areas with the largest volume of families and elderly women.

Age

Age provides another indicator of housing need. Key findings that informed the strategies and outcomes in ShapingSEQ include:

» The trend of an ageing population is continuing to occur not only in SEQ but across the country and is predicted to accelerate over the next few decades.

» An ageing population will lead to increased specialised care requirements, demand for new types of housing, and different patterns of public services, especially in social and health care.

» Smaller dwellings need to be delivered as our population continues to age, with detached larger homes often not being suitable for a couple or lone person living above the age of 65.

The issues identified above, in conjunction with changes in household composition, an ageing population, more mobile labour force and an expected return in net overseas migration are the key drivers for greater housing diversity across SEQ. These issues will become increasingly relevant as SEQ experiences population growth overtime, requiring a range of measure and policy interventions to support affordable living.

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[27] Rowley, S. and Ong, R. (2012) *Housing affordability, housing stress and household wellbeing in Australia*, AHURI Final Report No.192. Melbourne: Australian Housing and Urban Research Institute.

Emerging Challenges and Opportunities

Housing Market

Overall housing supply and diversity has not kept up with sustained demand for new homes and changing households. The problem is further compounded with a change in living preferences that has resulted in a fall in people per household. Population movement to urbanised areas and fewer people per household means the supply of more housing that suits the needs of the population is imperative.

The diversification of housing supply has become increasingly important in providing appropriate and affordable housing for our region to manage urban growth and address housing supply and affordability issues. Changes in household composition, an ageing population, a more mobile labour force and an expected return in net overseas migration are the key drivers for greater housing diversity and affordability across SEQ. The next 25 years of growth for SEQ will be different to the past 25 years of growth, presenting challenges and opportunities of a complexity beyond those faced by the region to date.

The new growth paradigm for SEQ will need a mix of expanded and enabled greenfield development growth coupled with intensified infill development in well planned and serviced locations. This will include opportunities for more compact residential development and higher dwelling densities in well serviced and planned locations and increased provision for gentle density that delivers greater housing choice for in current and future suburbs across the region.

Housing has increasingly been subject to market forces, with varying factors driving increased demand for, and cost of, housing in SEQ, as follows:

» Stable economy with low unemployment rates and continued growth in discretionary expenditure

» Increased interstate migration, which has more than offset declines in international migration

» Increase in demand for rental homes resulting from fracturing households during Covid-19

» Increased capacity to pay for housing due to higher household saving rates during Covid-19

» Increased demand for newly constructed homes from HomeBuilder stimulus, coupled with delays in construction and a significant increase in construction input prices.

Changes in the nature of the rental market are important to monitor as they are typically characterised by lower income earners who are more vulnerable to experiencing housing stress.

The supply of housing is not keeping pace with demand, and the impact of this supply shortfall is being felt most acutely in the private rental market, impacting the availability and affordability of rental properties. In September 2022, residential vacancy rates across SEQ were at historic lows and were below 1% in all markets analysed except for the Brisbane CBD, which sat at just about 1%. The national vacancy rate has also tightened to a new record low of 1.1% in October 2023.[28].

This decreasing vacancy rate, coupled with strong house price growth has significantly increased rent prices across the region, and state.

The decline in vacancy rates has placed significant upward pressure on median weekly rents across all markets, worsening affordability for all renters. Queensland's rental inflation has grown at a faster rate than any other jurisdiction in Australia.

Household compositions will be dominated by lone person households, followed by couples with children. Within the next 5 years, it is expected that lone person households will be the fastest growing household types across Australia.[29] This expectation for more space in our dwellings will create a further need for dwelling supply and drive demand, contributing to the tightness in the rental market. Returning migration is also adding to demand at a time when many rental markets where those travelling to the region have an immediate housing need.

It is important to note that the planning system is only one contributing factor to housing supply. There are several other factors that sit outside the planning system that impact supply of housing, such as land ownership and

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[28] CoreLogic (October 2023). Quarterly Rental Review for Q3 2023.
[29] National Housing Finance and Investment Corporation, 2023, State of the Nation's Housing 2022-23 (NHFIC Research)

acquisition, accessing financing and funding, housing construction, geographical constraints and public attitude towards development.

Housing Affordability

The cost of housing in Australia has grown significantly in recent decades as the price of houses and apartments have risen faster than average household incomes, with higher purchase prices flowing through to the cost of renting. It now takes approximately 10 years for a person on an average income to afford an average house in Australia. In Queensland, this is being felt acutely in SEQ where the bulk of urban growth is and will continue to occur.

An overall lack of suitable housing, including through private led development as well as social and affordable housing provision, is contributing to increased rental stress, mortgage stress, social housing demand and homelessness.

Nationally, the supply of new social housing has followed a downwards trend since the early 1990s which has created a shortfall in social housing stock. The recent rental vacancy rates being at record low rates, also contributes to overall falling affordability across the market and increases pressure on social housing demand.

Homes for Queenslanders aims to deliver one million new homes by 2046, including 53,500 new social homes. The plan is a commitment to unlock more homes, faster across the state and provides a vision or a fair and sustainable housing system that ensures better housing outcomes both now and for future generations.

The plan works towards overcoming inequality in the housing system to create a fairer playing field by focusing on delivering more homes and emergency accommodation for regional Queensland, closing the gap for First Nations peoples, and increasing access to government support and assistance. Homes for Queenslanders includes over 50 initiatives, backed by a $3.1 billion investment over five years.

A new Our Place: A First Nations Housing and Homelessness Action Plan 2024-2027 is also being developed and co-designed with First Nations peoples to address Closing the Gap outcomes.

Further, the Australian Government has announced a suite of initiatives in response to the current housing challenges including the 2022 National Housing Accord which aligns all levels of government, investors and the construction industry to build one million new, well-located homes over five years from 2024, and the introduction of draft legislation for the Housing Australia Future Fund to enable delivery of 30,000 new social and affordable homes within five years.

The Queensland Government Housing Summit in October 2022 set out a range of actions in the Outcomes Report (November 2022) to address the housing needs of Queenslanders. The Outcomes Report sets out actions across a range of matters for supply and support including policy and regulatory reform, finance and tax considerations, homelessness and housing support.

The outlook for inflation nationally remains uncertain. Households continue to adjust consumption patterns in response to the increasing cost of living pressures, presenting further risks for the future of inflation rates.

Inflation has impacted the residential construction industry in 2021 and 2022, with strong demand and tight supply for most materials due to rising construction costs and higher interest rates. Prices for construction materials increased by 17% between 2021 and 2022 which is the fastest growth rate since 1975.[30] This also places pressure on the ability for housing supply to meet the projected demand.

Higher interest rates are also creating difficulties for homeowners to service a loan. The International Monetary Fund (IMF) recently noted that, for Australia as a whole:

» mortgage borrowing capacity declined substantially to the end of 2022

» housing affordability concerns are likely to increase

» affordability is expected to continue to decline as interest rates rise despite falling house prices.[31]

The IMF have also noted that Australia has the second-highest level of housing market risk among the world's developed economies, after Canada.[32]

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[30] National Housing Finance and Investment Corporation, 2023, State of the Nation's Housing 2022-23 (NHFIC Research)
[31] IMF 2023, Country Report No. 23/50
[32] IMF 2023, World Economic Outlook: A Rocky Recovery

Redefining Disadvantage

Affordability across the region continues to decrease with the proportion of those expending 30% or less of their income on housing, be that rental or mortgage repayments, has continued to decrease. Historically, decreasing affordability is linked to those falling within disadvantaged categories as defined within the SEFIA indexes. Increased housing costs have an impact on all segments of Australian society, but young adults and teenagers are relatively more affected as they have fewer economic resources to use to pay high rents or to consider buying a property.

The decline in affordability has constrained the ability of skilled workers on average wages to service mortgage and rental payments. This is particularly evident in local areas in SEQ that are in close proximity to significant economic infrastructure such as hospitals and urban transport hubs. Workers within this group include police officers, paramedics, firefighters, rescue worker, nurses, allied health professionals, teachers and social workers.[33]

Generally, the average weekly wage of a nurse is $1,190 and a teacher $1,170.[34] Should a couple on the average nurses' wage choose to buy a detached dwelling at the median Brisbane housing price in December 2022 ($1,005,000) more than 53 percent of their combined income would be required to service their mortgage.[35] Similarly, if a single worker household wished to rent a one-bedroom apartment based on the median price in March 2023 ($400/week), they would be required to spend 34% of their weekly income on rent.[36]

The impact of reduced affordability around key employment hubs and economic areas will likely result in key workers and skilled workers being forced to live further away from work. As a result, experts are warning that increased commute times will add to stress and fatigue already being felt in industries, such as health care, aged care or educational industries.

In addition to the above, workers moving further away from employment does not necessarily reduce financial burden being experienced as transportation costs will increase. If workers in Brisbane today are to drive 15 kilometres to work, this equates to $14,124.00 per annum being spent on transportation costs. Should workers choose to travel by public transport, costs will be reduced by approximately 50% to $7,062.00 per annum. However, essential workers often work shifts or non-standard work hours and are unable to commute to work regularly via public transport, inability to work from home, further eroding financial feasibility.[37]

Key findings include:

» SEQ has experienced a decrease in housing affordability, with mortgage affordability decreasing from 93% in 2016 to 76% in 2021 and rental affordability decreasing from 86% (2016) to 57% (2021).[38]

» The decline in affordability has impacts on skilled workers on average wages, who mostly choose to reside in proximity to economic infrastructure, such as hospital or urban transports to easily access employment, and seek more affordable living options.

» There is an increasing trend of key workers on median incomes (not just modest or marginal) being forced to live further from where they choose to work due the lack of access to appropriate and affordable housing.

» There is a critical need for intervention and innovations to deal with these issues, particularly given the interlinkages between affordable housing and delivery of essential services within the region.

Climate Resilience

Queensland has long experienced the impacts of extreme weather including floods, heatwaves, bushfires and tropical cyclones. Climate change is expected to worsen the frequency, intensity and impacts of these weather events.[39] In the recent years, SEQ has experienced a number of natural disasters over the recent years including the bushfires of 2020 and the flooding event of 2022. It is clear following these events that that there is a need for the region to have sufficient information and resources to consider risks and be more prepared for extreme events.

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[33] ABS (2021) Census of Population and Housing 2021
[34] Average hourly base salary by occupation for Brisbane Qld for June 2023 available from Payscale.com and Indeed.com
[35] ABS (2023) Total Value of Dwellings, December quarter 2022
[36] Residential Tenancies Authority (RTA) median rents quarterly data, March quarter 2023
[37] Wang, J. (2013) Commuter costs and potential savings: Public transport versus car commuting in Australia, CRC for Rail Innovation: Southern Cross University, November 2013
[38] ABS (2016) Census of Population and Housing 2016
[39] United Nations. Climate Action – at February 2022

Natural disasters and events provide the opportunity improve resilience within communities. This means matching housing to community and environmental issues. Since the bushfire and flooding events, there has been an increase in natural disaster resilient buildings and housing initiatives to minimise these damages to the property as well as costs and inconveniences.[40]

Where existing residential areas are materially impacted by hazards this is noted and managed through local planning instruments and reflected in regional polices. Planning for future growth areas must consider known hazards.

Brisbane 2032

The region will benefit from the lasting legacy of the Brisbane 2032 Olympic and Paralympic Games that will bring communities together and foster long-term benefits.

Brisbane 2032 provides the opportunity to bring forward current and future infrastructure projects to support long-term, sustainable growth for the region. With an unprecedented decade long lead-in, this event will accelerate the delivery of key venues and infrastructure to support future population growth and increased tourism activity, in particular to SEQ.

The Brisbane 2032 Master Plan outlines six new venues and eight upgraded venues that align with the region's long-term development plans and anticipated growth patterns. They are being purpose designed to meet local needs while providing for key competitions for the Games which can then be repurposed for longer-term use.

Both mass transport and active transport infrastructure is required to support future transport capabilities demanded by the Games in the short term, and SEQ's growing population in the longer term. This will benefit the already forecasted population and associated dwelling growth the region is set to face.

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[40] Resilient Homes Fund. Queensland Government – 19 April 2023

Population and Dwelling Projections

Given the factors discussed in the previous sections including housing shortages, COVID-19 and high rates of immigration, it is crucial that ShapingSEQ is based on the most current and appropriate population projections that are robust and fit for purpose for use in long-term regional housing and infrastructure planning across SEQ. A methodologically robust and defendable population projection was sourced for ShapingSEQ 2023, and the following sections outline key assumptions and inputs that informed the projections.

Context

The analysis of population and dwelling projections builds an understanding of the probable nature and impacts of regional growth and helps to guide land use and infrastructure planning. The use of this data in regional planning is also intended to promote collaboration and consistency among stakeholders and local governments.

To-date, local governments, state agencies and utility providers use the Queensland Government population projections provided through Queensland Treasury for land use and infrastructure planning, most notably as input into planning assumptions for Local Government Infrastructure Plans (LGIPs).

Since the release of ShapingSEQ in 2017 which had a planning horizon out to 2041, the GMP has continued to invest in improving governments' understanding of drivers for land supply and housing in SEQ. In partnership with the Transport Analysis Unit in the TMR, the GMP has explored the use of alternative population projections for modelling use as part of ShapingSEQ 2023.

This analysis included the comparison of projection data used to support a range of transport and infrastructure projects. GMP has been working closely with the TMR to develop improved projections using data sourced from an experienced demographic modeller and data analyst.

Since 2020, COVID-19, migration and resultant immigration policies have led to historic fluctuations in population growth. Net interstate migration to Queensland reached record levels in the year to June 2022, with SEQ accommodating almost 80% of this growth. Net overseas migration is expected to make a strong contribution to population growth in SEQ to 2046, with a significant short-term increase to 2026.

Queensland's Population growth has recovered strongly post-COVID-19 driven by record levels of net interstate migration. In recent times, there has also been a significant recovery in net overseas migration both to Queensland and Australia. The figure below shows a significant increase in both net interstate migrations and net overseas migration.

Figure 3 - Components of population change 1984 - 2022 (Queensland)
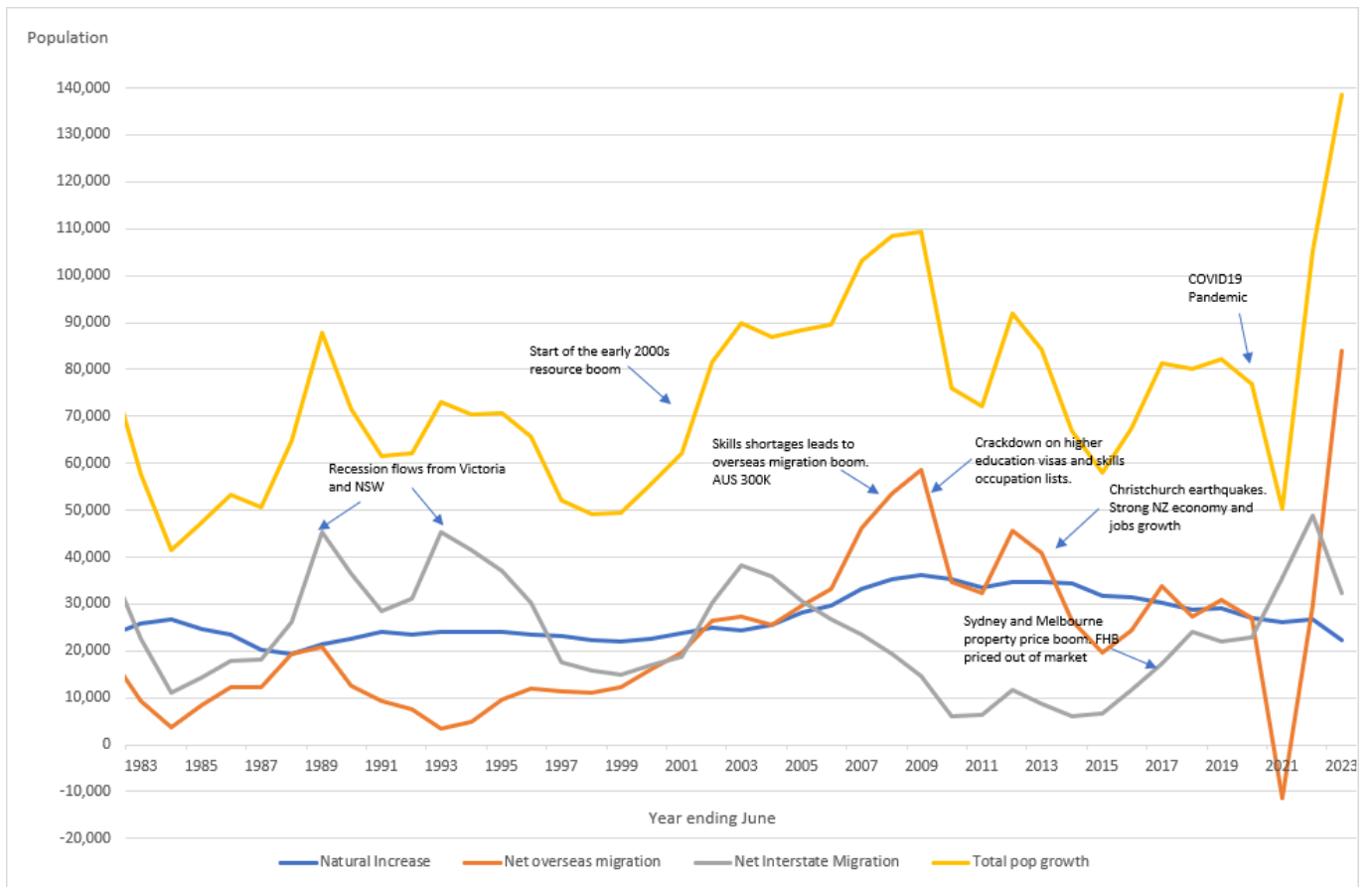
Source: ABS. National, state and territory population, June 2023

Adopting long term population projections during a period of considerable uncertainty is challenging when planning for the region. For ShapingSEQ 2017, projections were released by Queensland Treasury in 2016 (2015 edition) medium series and provided regional and local projections to 2036. Specifically, for ShapingSEQ 2017, Queensland Treasury extended the local population and dwelling projections to 2041 and provided an overall population figure for SEQ to 2061.

Population growth in Queensland continues to increase at a rapid rate, setting another record with a 2.6% increase (138,000 persons) in the year to June 2023. This growth was driven by a significant increase in net overseas migration both in Australia and in Queensland. Net interstate migration also continues to contribute to growth, although the rate has slowed. Natural increase has also ticked down following a spike during COVID-19 pandemic.

ShapingSEQ 2023 Population Projections

The ShapingSEQ 2023 Population Projections dataset was developed to capture recent trends in increased levels of migration to take account for the most recent growth pressures being faced in SEQ communities. ShapingSEQ 2023 Population Projections were jointly developed between the Transport Analysis Unit (TAU) within TMR and Advanced Demographic Modelling (ADM).

The ShapingSEQ 2023 Population Projections use a similar method to the Queensland Government population projections, and more accurately reflect contemporary assumptions relating to interstate and overseas, as well as the inclusion of current estimated population date up to June 2022 (including one of our highest growth years between 2021 and 2022).

This projection sits between Queensland Government projections medium and high series (2023 edition). The main difference between these datasets is the ShapingSEQ 2023 Population Projections dataset includes the latest

information on migration to Queensland to September 2022 and higher migration assumption in the earlier years (to 2024-25) informed by the latest forecasts from Commonwealth Treasury (May 2023 Budget).

The Queensland Government population projections medium series (2023 edition) projected population growth of approximately 88,000 in the year to June 2023 for Queensland. The ShapingSEQ 2023 Population Projections indicates growth of around 136,000 persons in the year to June 2023 for Queensland. This is consistent with, and reflects, the ABS ERP figures at June 2023.

Estimated resident population (ERP) figures for 2021 are Australian Bureau of Statistics (ABS) figures that were preliminary rebased estimates as at April 2023. The ShapingSEQ 2023 Population Projections use these rebased 2021 ERP figures for the base population figures. ShapingSEQ 2023 Population Projections are calculated at a decimal level precision but are displayed rounded to the nearest number of persons.

Statewide, more than half of Queensland's population growth in the year to June 2023 was from net overseas migration (60.7%). Nationally, net overseas migration has increased to 518,087 in the year to June 2023, compared with 203,590 persons in the year to June 2022, exceeding the budget forecast from May 2023 (estimated national net overseas migration reaching 400,000 in the 2022-23 financial year).

A key consideration for the population and dwelling projections for ShapingSEQ 2023 is the assumed regional population growth in the forecast period. Historical average growth rate is 2.2% per annum over the past 20 years and the Queensland Government 2023 medium series projected an annual population growth rate of 1.6%. The ShapingSEQ 2023 Population Projections present an average annual growth rate of 1.8%.

This input assumption was used at a SEQ level between the model base year (2021) and the forecast year (2046). The regional population totals are broken down by demographic groups, providing control over how aggregate household characteristics are transitioned over time in the simulation. Population growth control totals at a LGA level have not been introduced as a constraint for ShapingSEQ 2023, thereby allowing for an optimal distribution of households and dwelling growth across the region.

When comparing the actual and projected growth for SEQ, the ShapingSEQ 2023 Population Projections dataset shows the region's growth peaking in 2022-23 at 119,000 persons (3.1% per annum), reflecting higher levels of overseas and interstate migration. This high level of growth is expected to gradually slow to reach more long-run levels of 80,000 persons (1.4% per annum) by 2046 (see Figure 4 below).

The ShapingSEQ Population Projections 2023 indicate that of the additional 2.2 million people who will call SEQ home in 2046, 38.7% will come from overseas, 25.4% will come from interstate and 7.8% will come from elsewhere in Queensland.

Figure 4 - SEQ Population Growth - Actuals vs Projections
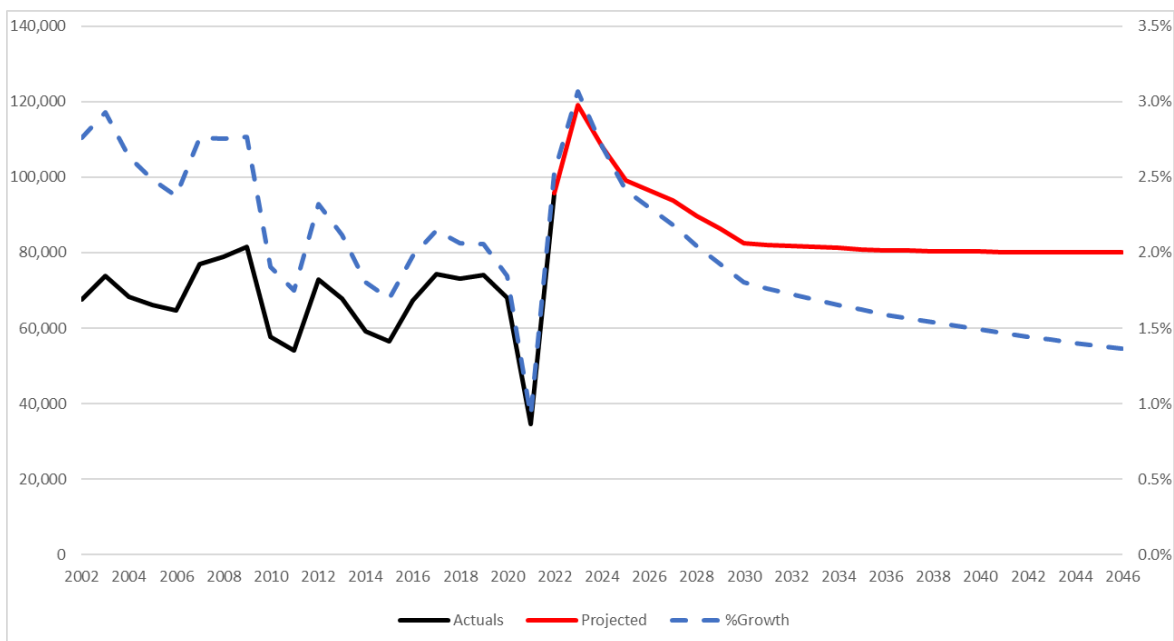
Source: ABS Cat. No. 3218.0; Department of Transport and Main Roads; Advanced Demographic Modelling

Methodology

Population Projections

Population projections for Queensland and major sub-state regions, including the ShapingSEQ 2023 Population Projections, were produced by SASPOPP (State and Sub-state Population Projection Program) out to 2046. The program incorporates cohort-component models to produce State and sub-state projections by sex and single years of age for 30th June each year from 2021 to 2066.

The cohort component model is a well-known and utilised modelling framework for producing State and Sub-State population projections by age and gender. The cohort component model transitions the population from when year and cohort to the next while accounting for changes to the population size and composition including:

» Natural Increase (Births less deaths)

» Net interstate migration (in-migration from outside State less out-migration from within State to other jurisdictions)

» Net overseas migration (in-migration from outside Australia less out-migration from within Australia to overseas)

» Net intrastate Migration (movement of population within the State for each year)

Dwelling Projections

Household and dwelling type projections were created from a household representative (headship) rate model and distributed between the dwelling types (Attached and Detached). The household types include:

» Couple with dependants;

» Couple without dependants;

» Lone parent;

» Other family;

» Group; and

» Lone person.

ShapingSEQ 2023 dwelling projections are provided for both attached and detached dwellings. Attached dwellings includes dual occupancy and multiple dwellings. Detached dwellings include single dwelling houses. ShapingSEQ 2023 dwelling projections are derived from the ShapingSEQ 2023 Population Projections and are calculated at a decimal level precision but are displayed rounded to the nearest number of dwellings.

The dwelling projections were calculated by first removing the population living in non-private dwellings to leave the population living in private dwellings only. Then, age-specific household representative rates for each household and dwelling type were multiplied by the projected population by age group to determine the number of household representatives. The number of household representatives equals the number of households. For the household and dwelling projections, household representative rates and propensies were projected using a linear/exponential model based on change between the 2011 and 2021 Censuses.

Assumptions and Inputs

The ShapingSEQ 2023 Population Projections dataset was informed by the latest trends and information on population, dwelling and household growth. The datasets that were used to inform the projections assumptions are defined in

Table 9 below.

Table 911 - Input datasets to inform assumptions

Dataset	Source	Currency
Census 2021	Australian Bureau of Statistics	August 2021
National, State and Territory Population	ABS Cat. No. 3101.0	September 2022
Regional Population components and trends	ABS Cat. No. 3218.0	June 2022
Births, Australia	ABS Cat. No. 3301.0	June 2022
Life Tables, Australia	ABS Cat. No. 3302.0.55.001	2019-2021
Commonwealth Treasury Budget	Budget Paper No.3	May 2023
Queensland Government Population Projections Draft Assumptions	Queensland Government Population Projections Advisory Group	June 2022

The ShapingSEQ 2023 Population Projections dataset was also based on the below population data assumptions in Table 10.

Table 1012 - Overview of assumptions used in ShapingSEQ Population Projections 2023 dataset

Component	Assumption	Source
Net interstate Migration	20,000 by 2030-31	QLD Govt Advisory Group
Fertility Rate	1.65 births per woman (2030-31)	QLD Govt Advisory Group
Net overseas migration	National 235,000 by 2030-31 QLD share (17%) by 2030-31	Commonwealth Budget, Centre for Population QLD Govt Advisory Group
Net intrastate migration	Share based on historical flows (past 5 years)	ABS Regional population Cat. No. 3218.0

Migration

Net interstate migration to Queensland is currently at record levels (55K) in the year to June 2022. The projections assume this level would taper off over the next 10 years to a more long-run figure of (+20K) per annum. The share of net interstate migration to the regions has been derived from historical trends provided by ABS data on regional population components of growth. The distribution of net interstate migration has been highly concentrated in the SEQ region (82.8%) during June 2022.

Figure 5 - Net interstate migration, Queensland 1981 to 2046
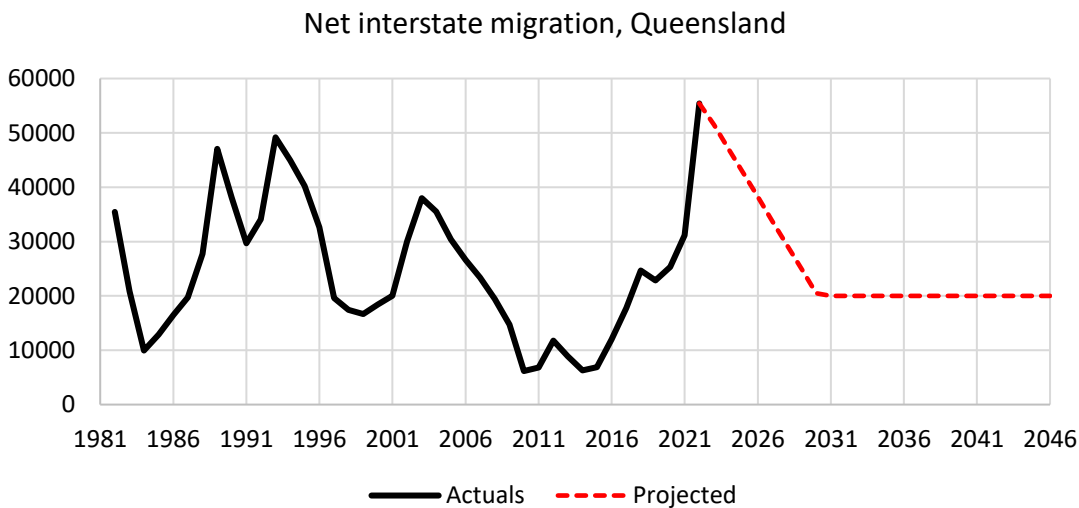
Net interstate migration, Queensland

Source: ABS. Cat. No. 3101.0; Department of Transport and Main Roads QLD; Advanced Demographic Modelling

Net overseas migration to Australia has recovered strongly in recent times, reflecting pent-up demand following border closures as the result of COVID-19. This recovery has been rapid and unprecedented with Commonwealth Treasury forecasting high levels of migration to continue over the next 5-year period. This trend has been reflected in the assumptions used for the ShapingSEQ 2023 Population Projections. It is assumed the national net overseas migration will return to long-term trend levels (235,000) by 2030-31. The share of net overseas migration is assumed to increase to 17% by 2030-31 to align with long-term trend levels.

The share of net overseas migration for the ShapingSEQ 2023 Population Projections has been informed by the information made available by the ABS (June 2022) on regional population components of growth. The period of 2020-21 was not used as this represented an outlier (COVID-19).

Net overseas migration to Queensland is highly concentrated in the Greater Brisbane region accounting for more than half of net overseas migration to Queensland (57.4%). The Gold Coast also receives a significant share of net overseas migration (17.3%) followed by the Sunshine Coast (6.2%).

Net overseas migration has increased to 518,087 in the year to June 2023, compared with 203,590 persons in the year to June 2022. The budget forecast from May 2023 had national net overseas migration reaching 400,000 in the 2022-23 financial year. This level has now been exceeded.

Figure 6 – Net overseas migration, Queensland 1981 to 2046
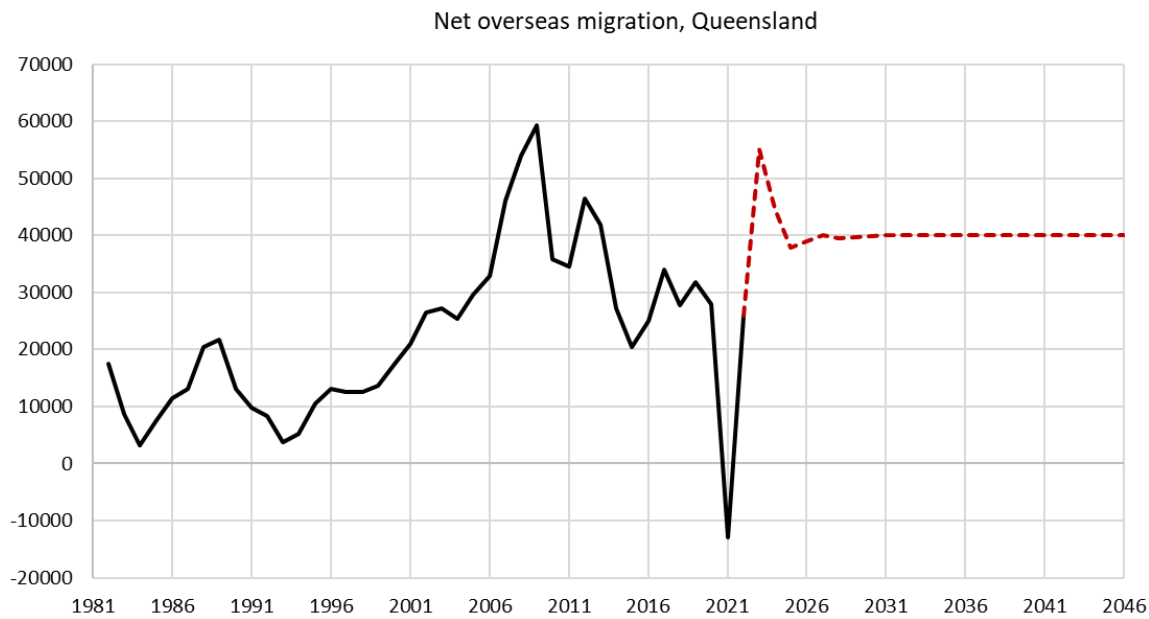
Net overseas migration, Queensland

Source: ABS. Cat. No. 3101.0; Department of Transport and Main Roads QLD; Advanced Demographic Modelling

Fertility

Total fertility rates (TFRs) representing the number of births per woman over her child-bearing years has been declining nationally and in Queensland over the past 15 years. In the past few years, there has been a slight upward tick in fertility rates. However, it has been assumed that fertility rates will continue to reduce albeit at a much slower rate and stabilise around 1.65 births per woman by 2030-31. The total fertility rates for the regions have been derived based on historical ABS data to estimate the regional differences from the State TFR figures. These differentials are maintained throughout the projection period.

Figure 7 - Total fertility rate, Queensland 1981 to 2046

TFR, Queensland

Actuals ----Projected
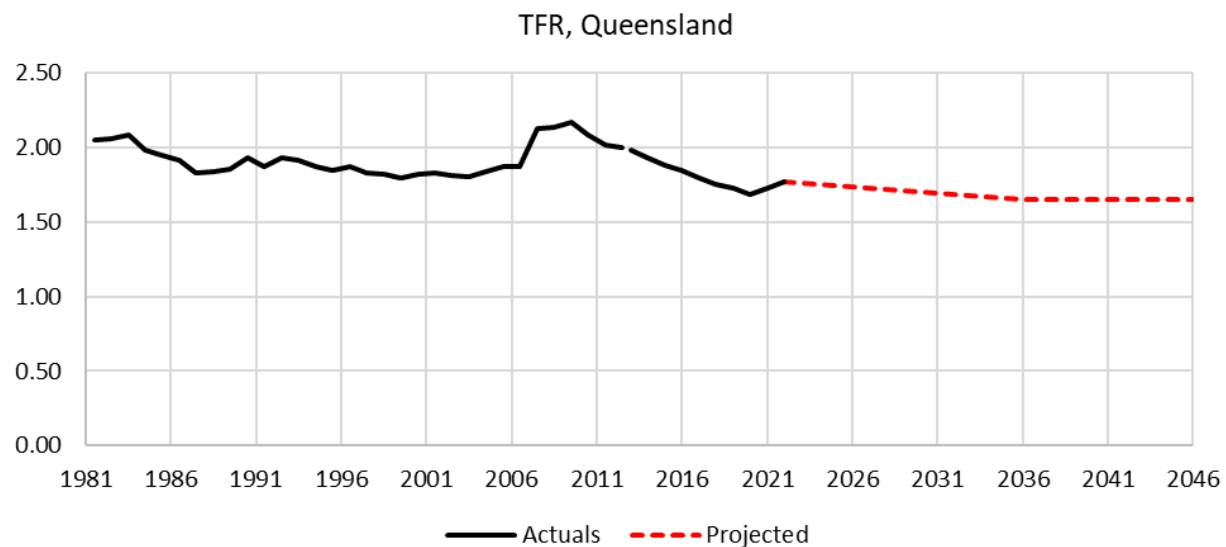
Source: ABS Cat. No. 3301.0; Department of Transport and Main Roads QLD; Advanced Demographic Modelling

Life Expectancy

Life expectancy assumptions for Queensland have been set as a proportion of national life expectancy forecasts with female life expectancy projected to reach 88.6 years by 2046 and male life expectancy assumed to reach 85.9 years by 2046.

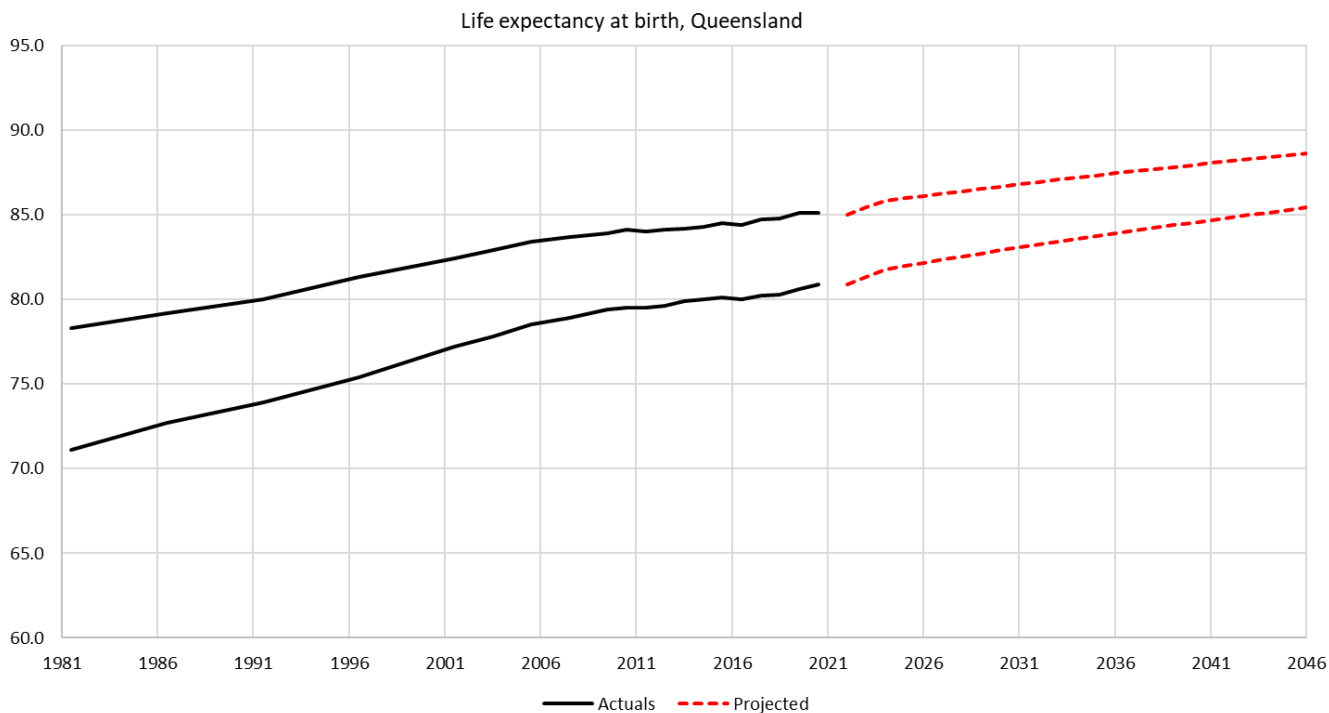**Figure 8 - Life expectancy at birth (years), Queensland 1981 to 2046**

Source: ABS Cat. No. 3302.0.55.001; Department of Transport and Main Roads QLD; Advanced Demographic Modelling

Modelling Land Supply and Demand

ShapingSEQ 2023 utilises an integrated modelling platform known as the Model for Urban Land Use and Transport Interaction (MULTI). The MULTI presented a number of fundamental improvements to previous modelling platforms and methodologies. These include but are not limited to;

» Data driven – drawn from known and robust data sets.

» Rule based – utilises a method and rules which are uniformly and consistently applied.

» Regionally consistent – applicable uniformly across SEQ.

» Verifiable – method and classification that is verifiable with observed data sets (Census).

» Policy aligned – typology method applied to dwelling supply targets at 2046 and presented at LGA level.

The application of MULTI provided analysis of:

» Supply and demand – capacity in planning schemes and demand factors that influence where households would choose to locate.

» Supply and realistic take-up – informed by financial feasibility to deliver development and current and planned infrastructure.

» Land use and transport integration – supply for new homes and existing and planned transport infrastructure to provide for more homes closer to transport and infrastructure investment.

» Employment accessibility – future growth in proximity to employment locations across SEQ to support shorter commutes, improved environmental outcomes and thriving businesses.

The following sections provides more information on the modelling methodology, inputs and key assumptions.

Model for Urban Land Use and Transport Interaction

Growth assumptions forecast the type, scale, location, and sequencing of development, and is often associated with population, employment, dwelling and floorspace projections. Data-driven land use growth assumptions are increasingly used by local and state governments in Queensland to inform infrastructure planning.

A need for stronger alignment between land use and infrastructure planning has been identified as part of the development of ShapingSEQ 2023. Since the release of ShapingSEQ in 2017 with a planning horizon out to 2041, the GMP has continued to invest in improving governments' understanding of drivers for land supply and housing in SEQ. This has included ongoing work with local governments, utility providers and the development industry on improvements to better forecast and measure land supply and monitor its development.

Since June 2022, TMR in collaboration with the department have taken the findings of this research to develop a fit-for-purpose operational housing demand and supply model for SEQ. ShapingSEQ 2023 utilises this new modelling platform to support integrated land use and infrastructure planning at a regional level, known as the MULTI. A wide variety of computer models are used to develop growth assumptions in SEQ. Since 2018, the MULTI has been under development in partnership between TMR, the University of Queensland (UQ) and the department in consultation with local governments as part of SEQ GMP.

In particular, the GMP has supported improved planning assumptions and a sharing of data by local governments and state government agencies. Improved practice from the GMP, together with outcomes from work undertaken on the UUF, updated planning assumptions for Priority Development Areas (PDAs) and updated local government development assumptions, has provided a more realistic understanding of capacity within the 2017 Urban Footprint. Further, the monitoring of industrial land has provided a more detailed understanding of industry land supply and requirements.

ShapingSEQ 2023 has also been underpinned by a new regional integrated land use and transport modelling framework – the MULTI. The MULTI was developed and calibrated for SEQ, using real world data and best practice methodologies from various academic disciplines such as demographic projection methods, land use planning, transport demand modelling, economic and econometric modelling.

The MULTI was used to test growth scenarios across SEQ to understand the region's ability to provide the required number of homes to meet projected demand in accordance with the preferred growth pattern and infrastructure service delivery. MULTI is a planning support system that has been designed to dynamically examine the dwelling supply size, and the speed of delivery and dwelling typology mix across the region. Size, speed and mix outputs from MULTI was used to inform the preparation of dwelling supply targets for ShapingSEQ 2023. The development of MULTI is a direct response to the Queensland Audit Office (QAO) Integrated Transport Planning Report 4: 2017-18 (QAO report).

MULTI is made up of three broad components: 1) Dwelling Supply, 2) Dwelling Demand, and 3) Infrastructure (transport, water and sewer). Each of the three components interact dynamically for a supply and demand equilibrium informed by transport infrastructure. Noting also, other types of trunk infrastructure servicing are included such as water and sewer. The modelling framework incorporates a range of supply and demand factors, including development feasibility, transport infrastructure investments, market take-up rates, infrastructure servicing provisions, and housing demand drivers such as transport accessibility, school catchments, development typology, socioeconomic factors, and locational considerations.

The figure below provides an overview of the supply and demand factors coming together with the transport model, population and dwelling demographics and projections.

Figure 9 - MULTI Framework
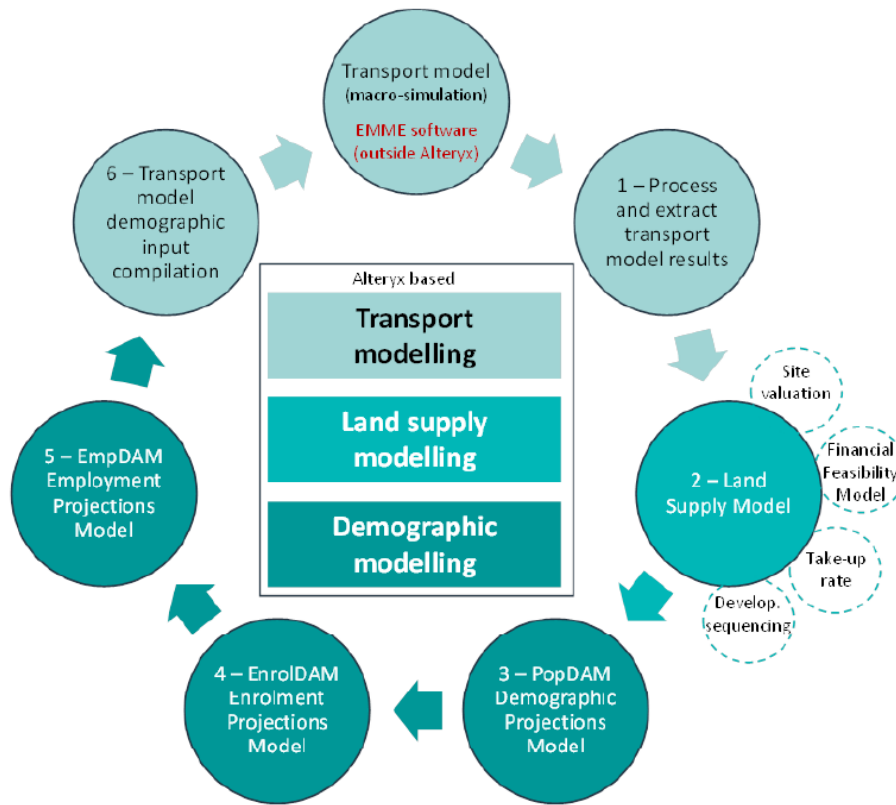
MULTI unlike many other urban growth models can capture housing demand drivers across the region that dynamically change through time in response to changes in land use planning and infrastructure investment. These factors were informed by an extensive research project with the University of Queensland, funded by iMOVE CRC under supported by the Cooperative Research Centres program, an Australian Government initiative.

Due to the integration of various methods and tools, MULTI is considered as hybrid simulation ecosystem at a MESO level that also draws upon elements from MICRO and MACRO levels already utilised by government. MACRO level modules from SASPOPP (State and Sub-state Population, Household & Dwelling Projection Program) and Queensland Treasury/Victorian University CGE (Economic Model) are used to project population growth by single year of age, dwellings by type (attached/detached), households and employment by industry. Some of the MESO inputs are population projections by age group, dwelling projections by type, enrolment projections by type, employment projections by industry/occupation and transport model demographic data. In addition, MICRO level models from Council Urban Growth Models, Utility Provider Infrastructure Planning Modelling, and Queensland Land Use and Activity Database (QLUAD) are drawn upon to inform land use, infrastructure, and ultimate development (maximum zoned capacity).

Figure 10 - Modelling Ecosystem Comparison
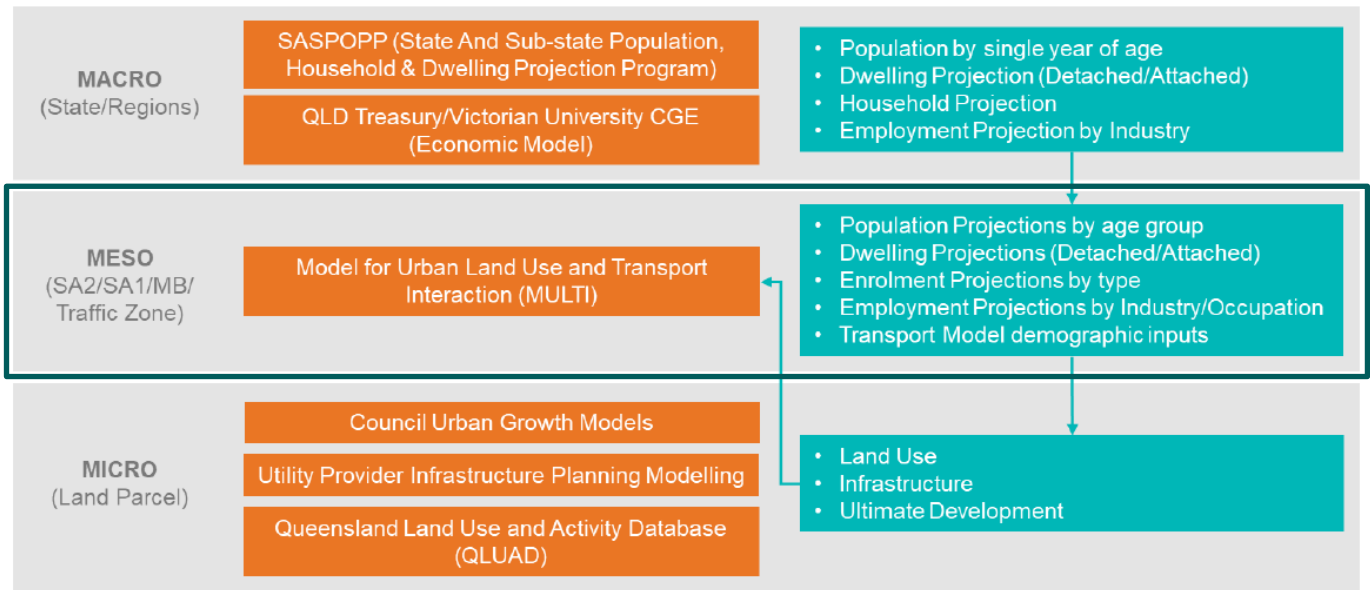
MULTI Capabilities

MULTI dynamically integrates economics, transport modelling, demographics, and land use planning to test growth scenarios across SEQ for planning and decision making. For the first time, the modelling could consider various factors that impact demand and take up including:

» How housing demand, location choice and interacts with available housing supply, considering infrastructure servicing across SEQ.

» Understanding the land use benefits unlocked from major future planned transport infrastructure investment projects, such as Cross River Rail, Coomera Connector, Brisbane Metro, which will be used to support preliminary evaluations and business cases through Infrastructure Australia.

» Involving the dynamics of the housing market across the region in response to changes in accessibility, land use policy and transport outcomes.

» Informing the suitability, sizing, and potential future growth requirements for the urban footprint and, dwelling supply targets.

» Key infrastructure connectivity considerations that may impact future growth.

MULTI accounts for movement and land use dynamics across local boundaries and serves as a holistic source of information. Together with model systems in local government and utility providers, MULTI provides for a rich source of information for planning policy and decision making across the region. For example, the MULTI has the ability to:

» Provide a data driven and evidence-based methodology with a transparent modelling framework that is scalable to meet stakeholder needs.

» Build a robust evidence base to understand the uplift potential and wider economic benefits relating to infrastructure investment and land use planning decisions.

» Provides state government, and local governments that choose to do so, with the ability to test different infrastructure scenarios with land use planning changes (up zoning, redevelopment).

» Effectively engage on growth and testing of policy, macroeconomic or technological changes or events (e.g., Olympics).

» Significantly improve the analysis and modelling that underpins project business case submissions for major infrastructure projects.

Table 13 below provides a breakdown of the MULTI capabilities.

Table 1113 - MULTI Model Capabilities

	ShapingSEQ 2017	ShapingSEQ 2023
Supply factors		
Zoning	Yes	Yes
Land suitability	Yes	Yes
Ultimate development	Yes	Yes
Development feasibility (financial feasibility model)	No	Yes
Transport infrastructure	No	Yes
Realistic take-up rates	No	Yes
Water/waste infrastructure provision (ability to service)	No	Yes
Demand factors		
Household changes	Yes	Yes
Dwelling type requirements	Yes	Yes
Transport accessibility	No	Yes
School catchments and ranking	No	Yes
Location attractors	No	Yes
Socioeconomic factors	No	Yes

MULTI uses a population demand model that include factors that considers demand and supply of housing stock in the SEQ context. The following key variables that have a strong contribution to the predicting power of the MULTI includes:

» Planning approvals issued by the local governments for prediction of dwelling supply

» Quality of schools in the area reflecting the fact that families often select their place of residence based on a specific school catchment zone

» Index of socioeconomic advantage and disadvantages of the areas

» Proximity to commercial land, community, health and educational land uses

» Distance to the coast which captures a positive value from proximity to the coast where the populated areas are located

» Distance to the closest regional activity centre

» Travel time to work on all transport modes (car, bike and public transport).

The location attractors considered as part of the modelling includes proximity to activity centres, parks, recreation, coastline, healthcare, retail, restaurants and cafes, and distance from constrained land and industrial uses.

This framework provides a theoretical and practical contribution to the modelling of land use and population scenarios. The analysis undertaken by the Queensland Government takes into account realistic developability to the greatest extent possible in regional planning practice for Queensland. This analysis has directly informed spatial pattern of growth to 2046.

ShapingSEQ 2023 – Projected Population and Dwelling Supply

The ShapingSEQ 2023 Population Projections show that by 2046, SEQ will be home to an additional 2.2 million people. This will require approximately 900,000 additional new homes and expects an average growth rate of 1.8% per year (34,500 new dwellings each year). Of these additional people, 28.1% are due to natural increase,

38.7% are due to net overseas migration, 25.4% are due to net interstate migration and 7.8% are due to net intra-state migration.[41]

The following tables provides the projected population growth and required dwellings to 2046.

Table 1 - Population and Dwelling Projections (SEQ Total) – ShapingSEQ 2023 Projections

SEQ	2021	2026	2031	2036	2041	2046
Population	3,786,200	4,304,800	4,739,300	5,145,100	5,546,700	5,946,900
Dwellings	1,536,500	1,727,100	1,898,400	2,065,500	2,231,100	2,400,300

Table 2 - Population and Dwelling Growth (SEQ Total)

SEQ	Growth 2021 to 2026	Growth 2021 to 2046	2021 to 2046 (%)
Population	518,500	2,161,700	1.8%
Dwellings	190,700	863,800	1.8%

Due to rounding factors, the percentage of growth rate presented in the table may not precisely reflect the absolute figures.

Table 3 - Projected population growth and required dwellings in SEQ 2021- 2046 (ShapingSEQ 2023 Population Projections)

Local Government	Population		Total Dwellings	
	2021	2046	2021	2046
Brisbane	1,264,000	1,726,400	518,500	729,300
Gold Coast	633,800	1,022,100	271,400	433,100
Ipswich	233,300	480,000	87,200	177,000
Lockyer Valley	41,800	67,900	16,100	25,300
Logan	350,700	667,100	125,700	235,900
Moreton Bay	484,400	792,700	188,100	313,900
Noosa	56,900	75,700	28,300	33,300
Redland	161,700	211,500	65,000	84,800
Scenic Rim	43,600	70,600	18,200	27,900
Somerset	25,400	42,200	10,800	16,500
Sunshine Coast	346,600	565,700	147,200	232,000
Toowoomba	144,000	225,000	60,000	91,300

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[41] ShapingSEQ 2023 Projections

Local Government	Population		Total Dwellings	
SEQ Total	3,786,200	5,946,900	1,536,500	2,400,300

Due to rounding factors, the percentage of growth rate presented in the table may not precisely reflect the absolute figures.

However, Ipswich will grow at the fastest rate. Among the 12 LGAs, Ipswich will experience the highest annual growth (2.87%), followed by Logan (2.55%).

The ShapingSEQ 2023 Population Projections provide a point-in-time snapshot based on future population trend to enable informed policy direction. The projections incorporate the most recent population estimates from the ABS and consider both interstate and overseas migration projections. The plan also takes into account new integrated land use and transport modelling to determine future growth needs, including dwelling supply, speed, and mix across the region. Given the uncertainty of assumptions that will provide the most accurate trends for our future growth patterns, the department will continue to review and regularly update approaches as actual data is confirmed, and the State Government's GMP will capture how SEQ is tracking over time, with future, more regular revisions to ShapingSEQ updating policy directions as necessary.

This is a significant challenge for governments, development industry and communities particularly considering the pressure already being experienced in housing shortfalls and worsening affordability.

Demographic trends are driving the need to plan for both smaller households and attached dwellings and larger households and detached dwellings. Figure 11 and Figure 12 illustrate the household composition derived from ShapingSEQ 2023 population projections and allocation of house type across both attached and detached dwellings.

SEQ requires an additional 345,000 detached dwellings to meet the needs for larger households while an additional 520,000 attached dwellings are required for smaller households. The response in ShapingSEQ has sought to support the delivery of this mix of housing while also considering the rate of growth and distribution across the region. Importantly SEQ is currently experiencing a period of significant housing stress, with overall housing supply and diversity not keeping up with sustained demand for new homes and changing households. The ability to realistically plan for and deliver appropriate housing across the region at the required rate has been analysed extensively as a part of the regional plan review.

Figure 11 -– Dwellings by Household Type (2021 and 2046)

	Couple with children	Couple without children	Group	Lone parent	Lone person	Other family
■ 2021	460,169	404,559	68,814	174,294	344,390	18,125
■ 2046	709.524	589.417	95.547	318.319	596.024	25.295
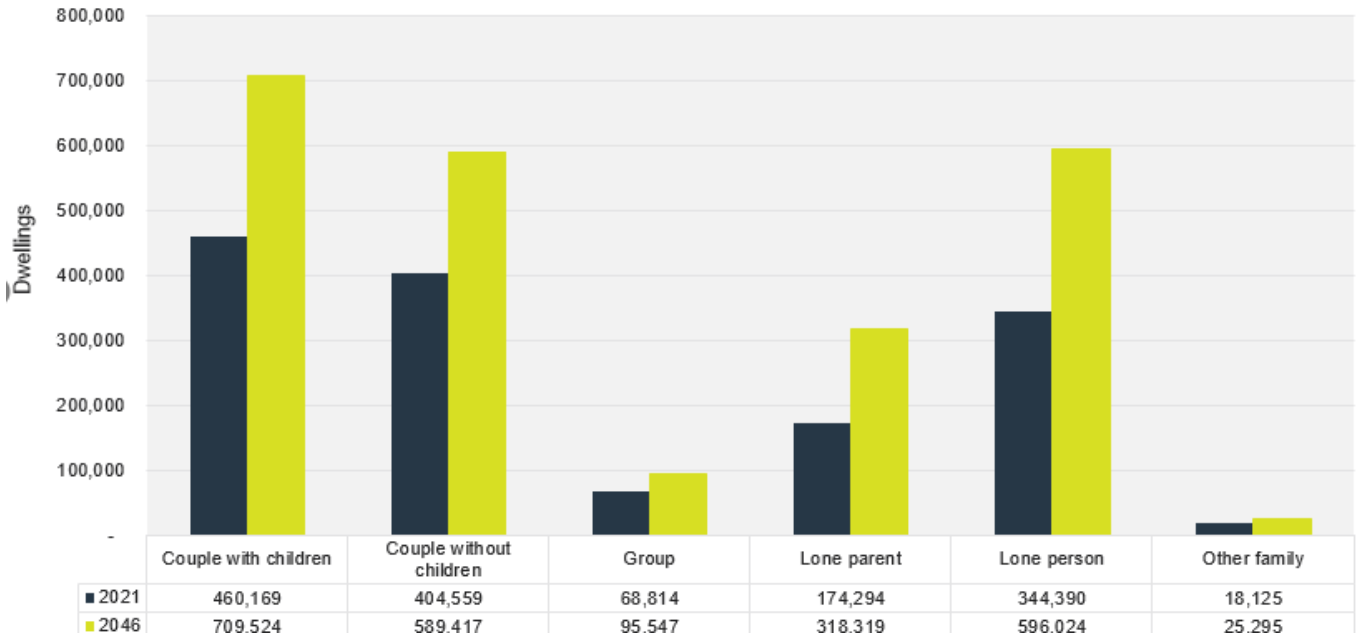
Figure 12 – Attached and Detached Dwellings by Household Type (2021 and 2046)
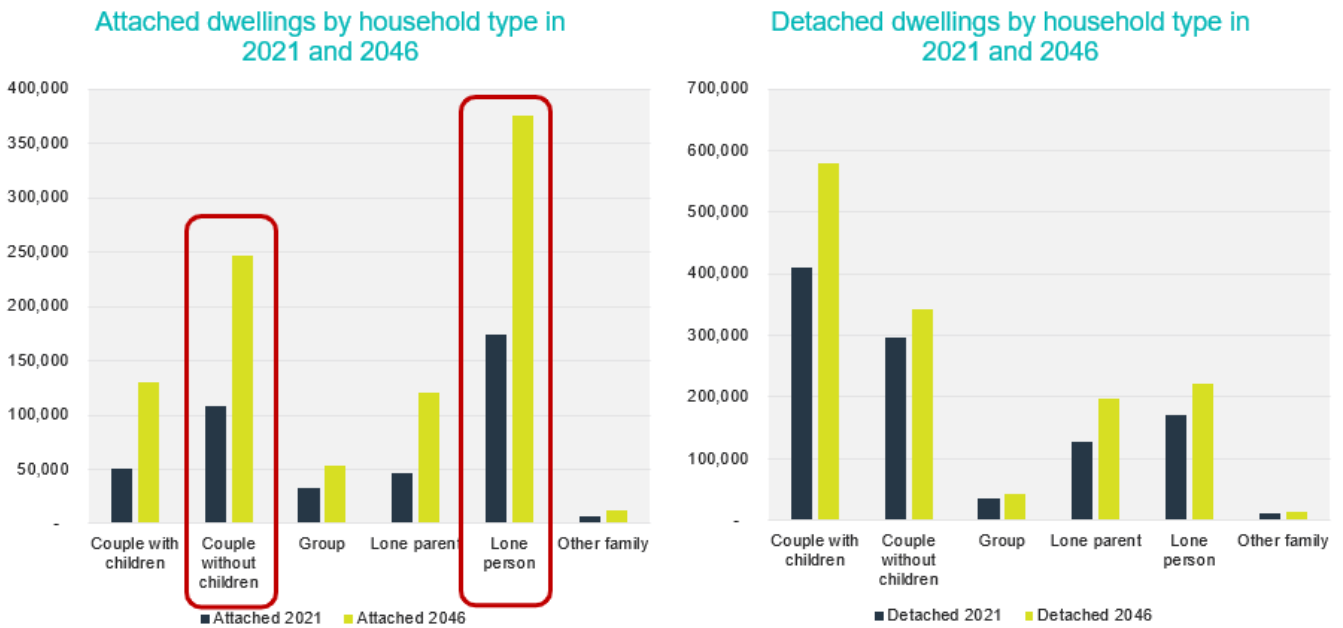
SEQ Analysis

To inform the policies within ShapingSEQ, including the dwelling supply targets and Urban Footprint expansion areas, a range of scenarios were developed and tested. Each scenario included assumed changes in residential supply through proposed policy changes. With total demand for SEQ remaining constant each scenario resulted in different allocation of growth geographically and temporally. Each scenario was framed around different policies and are presented below.

The scenarios were considered to inform the choice of the preferred pattern of future growth in ShapingSEQ. These scenarios included various consolidation and expansion splits across the region against the ShapingSEQ 2023 Population Projections.

ShapingSEQ 2023 involved comparisons of dwelling supply (capacity for residential dwellings identified within statutory planning schemes) and demand (housing type and location preference to accommodate projected population increase).

In considering additional urban footprint, consideration is given to LGAs where in balancing policies and appropriate mix of greenfield and infill capacity it is determined that additional greenfield capacity is required to meet housing needs.

The analysis undertaken within ShapingSEQ 2023 assessed the population projections based on capacity, rate of development and housing type to meet future population needs. Where this analysis indicated a shortfall in supply or a significantly slowing rate of growth, further analysis was undertaken to understand whether additional supply can be provided through infill and/or greenfield development.

This balanced analysis of additional infill and greenfield capacity to meet future population projections identified a number of locations where additional capacity was required.

MULTI strengthens the evidence base to inform planning and investment decisions. It begins with running a BAU scenario to provide an initial understanding of the current situation (problem statement), and subsequently explores the combined impact of land use and transport policy interventions on future population and dwelling growth distribution across the region.

The introduction of alternative land use policy interventions either increases or decreases ultimate development capacity across the region.

Figure 13 illustrates the difference between the Base Case (BAU) ultimate development and the change in ultimate development capacity through a change in regional policy.

Figure 13 - ShapingSEQ 2023 Projection Scenarios
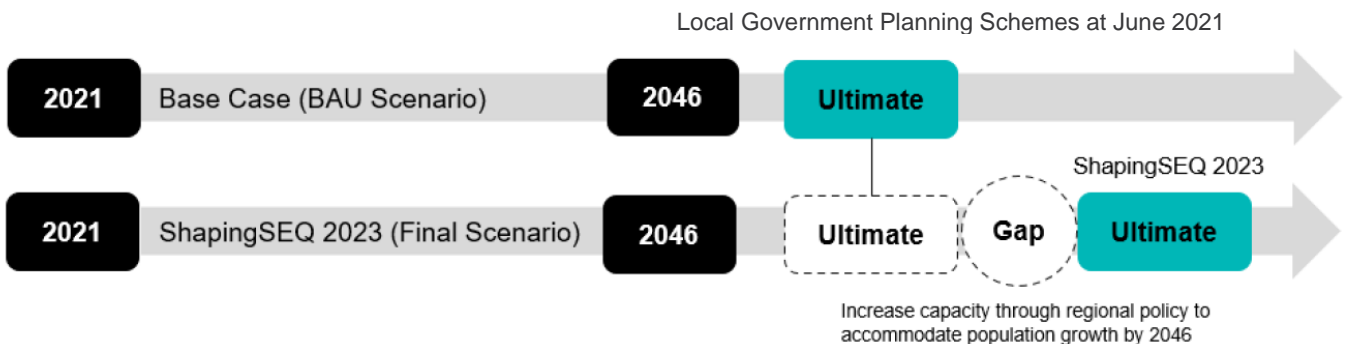
Base case (BAU) Scenario

The business-as-usual scenario (referred to as "base case scenario (BAU)") takes account of the allocation of projected population and dwelling demand (top-down) to the current state of play (bottom-up supply via current statutory land use and infrastructure policy). It relies on information sourced from local governments to the extent that growth and infrastructure requirements are reflected within each local government planning scheme and LGIP.

The base case (BAU) results involved review of current planning schemes and their ability to accommodate residential growth including their capacity and rate of growth. Dwelling projections are informed by ultimate dwelling supply figures sourced from planning assumptions of Local Government Infrastructure Plans (LGIPs). The maximum zoned capacity, representing ultimate development, is an important measure indicating the maximum planned dwelling supply capacity in LGAs.

Local planning assumption data was used in the generation of the ShapingSEQ 2023 base case scenario (BAU), with the exception where the Census dwelling count as of 2021 exceeded the ultimate dwelling count specified in the planning assumptions of local governments. This means that the base case (BAU) relies on information sourced from local governments to the extent that growth and infrastructure requirements are reflected within each

local government planning scheme and LGIP. The analysis of the base case (BAU) scenario identifies there is a need for more land supply to meet dwelling and employment demand while balancing the rate of development and mix of housing supply.

ShapingSEQ 2023 Population Projections account for population growth from 3.78 million people at 2021 to almost 6 million people in 2046, producing a base case (BAU) dwelling supply estimate for the region. The base case scenario considers the allocation of growth under existing statutory land use and infrastructure policy settings as they were at June 2021.

A number of variables and inputs were used as part of determining the base case scenario (BAU) results, including:

» Accessibility (transport network to 2046, including Olympic Infrastructure)
» Desirability (demand)
» Financial feasibility
» Ability to service infrastructure
» Latest planning assumptions from each LGA

The above inputs provided the following base case (BAU) dwelling results.

Table 1412 – Base case scenario (BAU): Projected Dwellings and capacity and growth rate analysis at 2046 for SEQ

LGA	2021	Projections at 2046	Ultimate capacity from the base case (BAU)	Remaining Capacity	% of Remaining Capacity	Projected growth rate between 2021-2046	Actual growth rate/year 01-21
Brisbane	518,500	703,000	715,500	12,500	2%	1.4%	1.6%
Gold Coast	271,400	452,200	573,000	120,800	21%	1.9%	2.2%
Ipswich	87,200	191,800	239,000	47,200	20%	2.9%	3.1%
Lockyer Valley	16,100	27,100	33,700	6,600	20%	1.8%	2.0%
Logan	125,700	257,000	310,500	53,500	17%	2.6%	2.0%
Moreton Bay	188,100	306,100	328,300	22,200	7%	2.1%	2.8%
Noosa	28,300	34,800	44,600	9,800	22%	0.7%	1.2%
Redland	65,000	79,400	81,700	2,300	3%	1.1%	1.9%
Scenic Rim	18,200	29,600	30,500	900	3%	1.7%	1.7%
Somerset	10,800	19,500	19,500	0	0%	1.7%	1.8%
Sunshine Coast	147,200	206,100	213,900	7,800	4%	1.8%	2.5%
Toowoomba	60,000	93,600	104,900	11,300	11%	1.7%	1.6%
SEQ	1,536,500	2,400,200	2,695,100	294,900	11%	1.8%	2.1%

Following the base case scenario, an analysis was undertaken to assess ultimate capacity, and compare projected and historical growth rate. The findings indicated that Brisbane, Redland, Scenic Rim, Somerset, Sunshine Coast and Moreton Bay, are identified as having either limited or no remaining capacity for dwelling growth at 2046. The following key considerations can be identified:

» At an SEQ level, there is only 11% remaining capacity at 2046 with a moderate actual growth rate identified.

» Brisbane (2%), Moreton Bay (7%), Redland (3%), Scenic Rim (3%), Somerset (0%) and Sunshine Coast (4%) LGAs all run out of dwelling supply capacity at 2046.

> » Gold Coast (21%), Ipswich (20%), Lockyer Valley (20%), Logan (17%) and Noosa (22%) LGAs retain dwelling supply capacity at 2046 even when taking into account very high rates of assumed growth for Logan.

> » Toowoomba (11%) retains some capacity but presents a lower take up rate in comparison to other LGAs. However, through its Local Growth Plan has demonstrated the need of additional greenfield residential supply to support existing communities within Highfields and Westbrook.

> » Brisbane and Gold Coast LGAs have very limited opportunities to support the delivery of detached dwellings.

The limited supply will over time impacts on rate of growth due to limited development opportunities. It is sound and reasonable planning practice to ensure there are sufficient reserves of residential land supply to ensure growth and the market is not unduly restricted. It is also relevant to note that the Brisbane and Gold Coast LGAs have very limited opportunities to support the delivery of detached dwellings. Further high growth LGAs, namely Logan and Ipswich, retain high levels of supply of detached dwellings at 2046 as supply diminishes in other LGAs across SEQ.

The analysis of the base case (BAU) identifies there is a need for more land supply capacity to meet dwelling and employment demand while balancing the rate of development and mix of housing supply.

This analysis suggests that locations with existing and planned supply (Flagstone, Yarrabilba, Ripley, Waraba (formerly Caboolture West) and Beerwah East SEQ Development Area) need to ensure that they are being utilised for residential growth appropriately and in a timely manner. At the same time the identification of additional supply in locations with existing extensive supply will have limited value in supporting housing supply over the next 25 years. In simple terms, additional supply needs to be planned carefully to support regional outcomes and realistically contribute to supply over the life of the plan.

Growth Scenarios

The 25-year (2046) planning horizon for ShapingSEQ 2023 recognises that addressing housing needs requires a long-term view, given the likely lead in times for take up rates and interventions to be reflected in planning schemes.

The MULTI has been applied through an iterative methodology where the business as usual or current situation (base case) was analysed. Subsequent alternative scenarios (referred to as alternative scenarios) have been modified and tested through the application of "policy interventions" or in other words – regional planning policy. The aim has been to identify a preferred growth pattern where growth is allocated and the Urban Footprint is sized giving consideration to size, speed and mix of desired residential growth. This is referred to as the 'final preferred growth pattern'.

Several scenarios were considered to inform the preferred growth pattern at a regional scale across SEQ. These scenarios included various consolidation and expansion alternate supply options against the ShapingSEQ 2023 Population Projections.

Where supply was identified as constrained, a balanced approach was taken to explore additional consolidation and expansion capacity required.

The policy direction provided under ShapingSEQ 2023 has been developed with the following key components of growth management:

> » Size – accommodating future households in accordance with a preferred growth pattern

> » Speed – having improved knowledge about barriers to growth can we meet the required rate of housing delivery

> » Mix – will the region be able to deliver necessary diversity in housing types for new and changing households

Alternative scenarios were tested using different assumptions to reflect proposed policy interventions. These interventions provided additional residential supply for both detached and attached dwellings in expansion and consolidation locations at different timeframes.

When considering the range of policy interventions weight has been given to interventions which support attached dwellings in consolidation locations. At the same time, the need for detached dwellings and supporting larger households as we grow was also considered.

Where additional detached capacity was needed, the first set of assumptions applied through alternative scenario modelling assumed an accelerated rate of delivery in existing committed areas. Subsequent to that, changes to

Urban Footprint have been included where they respond to regional needs, in particular the regional growth needs and realistic assumption regarding the rate of growth and mix of housing across. This is further explained below.

Since the release of the draft ShapingSEQ 2023 Update, several changes were made to the assumptions informing the alternative scenario model run in response to feedback from local governments and industry, as well as public submissions, including changes to the Urban Footprint. Changes to the assumptions used to inform the final scenario run for ShapingSEQ 2023 included:

» Amending the Financial Feasibility Model (FFM) to update the internal rate of return from 7% to 18%.

» Strengthening assumptions that support gentle density provisions through a more realistic uplift scenario applied to the Low-Density Residential Zone.

» Refined assumptions for Beerwah East SEQ Development Area and Waraba (formerly Caboolture West) because of the progression of these projects.

» Incorporating areas identified for further expansion in the Urban Footprint for both residential dwelling supply and future employment.

» Incorporating TMR network changes to the current SEQ Strategic Transport Model (STM) Reference Case networks of 2026–2046 to better align with recent state government infrastructure announcements.

Local land supply assumptions, combined with the introduction of spatial and temporal adjustments in land supply and infrastructure policies at a regional planning level, contributed jointly to the final dwelling projections for ShapingSEQ 2023 from 2021 to 2046. Consistent with similar modelling approaches, and the combined use of both local and regional input assumptions, it is important to note a degree of uncertainty regarding the timing and magnitude of dwelling projection increases as the time horizon is extended and the geographic area under consideration is reduced.

The assumptions will be further explained in the following section.

Consolidation Areas

The update to ShapingSEQ has placed an even greater emphasis on the need for a compact growth pattern. ShapingSEQ 2023 has sought to manage growth and change for each LGA through applying the following variables to support greater efforts for consolidation:

» Transit supportive densities along high frequency rail and bus networks including densities within proximity to Gold Coast Light Rail and Sunshine Coast Council Mass Transit.
» Additional densities around both Principal and Major centres identified within the regional plan.

Assumed additional uplift associated with policy interventions to support greater housing diversity in the low-density residential zones. The above inputs into the growth scenarios tested are directly supported by key policy interventions and actions for stakeholders to enable their delivery and increase supply.

These assumptions will be further explained in the following section.

Expansion Areas

A balanced approach to growth scenario testing involved sizing the urban footprint to accommodate future housing. Where necessary, additional expansion capacity was identified (either through accelerated greenfield land delivery or additional land delivery generally), changes to urban footprint have occurred.

The Regional Land Use Categories, dwelling capacities and dwelling supply based on likely demand and realistic take-up were identified for each of the scenarios. Potential additional Urban Footprint areas were and will be continued to be identified through several rounds of consultation with councils.

As a result of the analysis, additional inclusions were also identified through assessing existing growth areas from ShapingSEQ 2017, and a regional constraints analysis to identify regionally significant developable areas.

Potential Future Growth Areas (PFGA) are defined as follows in the regional plan:

> *"The intent is to protect their future potential, not to promote or support their investigation for urban purposes during the life of ShapingSEQ, unless the Queensland Government's SEQ Growth Monitoring Program indicates adequate supply may not be provided and the benchmarks or baselines may not be accommodated in the Urban Footprint…*
>
> *…The role of these areas will be considered further at the next review of ShapingSEQ."*

In accordance with the above, PFGAs were therefore the next logical areas that could provide reasonable alternatives for growth.

As demonstrated above, supply constraints were identified for the entire region and specifically within the Sunshine Coast, Moreton Bay and Redland LGAs. In the context of these LGAs, additional greenfield supply was assumed with increased development rate and with the addition of PFGAs. In the context of these LGAs additional greenfield supply is necessary. This prompted assessment of the Elimbah and Southern Thornlands PFGAs from ShapingSEQ 2017. Southern Thornlands and Elimbah PFGAs were identified as requiring further investigation based on the base case (BAU) results and given their location within the councils that require additional dwelling capacity. These PFGAs have previously progressed through a rigourous assessment as part of their identification of a PFGA, and are under existing investigations by each local government for future urban purposes.

These new areas are expected to address an identified undersupply in high growth areas in the region. The identification of these expansion area resulted from an analysis of hard constraints, local identified need, local government planning investigations, infrastructure provisions, compliance with the Urban Footprint principles and any likely impediments to development.

Finally, the recognition of this suite of policy interventions including additional urban footprint has resulted in the allocation of detached dwelling growth across the region. It illustrates even with the proposed interventions, the local governments of Logan, Ipswich, will accommodate 43% of all new detached dwellings. Moreton will accommodate 16% of detached dwellings. With the addition of Southern Thornlands, Redland will accommodate an additional 3% while Toowoomba will accommodate 6%. It is not considered that this allocation through the urban footprint changes represents an over allocation of detached dwelling growth to these LGA's.

Looking beyond 2046 this region wide analysis has also resulted in the addition of five (5) new PFGAs. The areas assessed and documented are Staplyton, Highfields, Buccan, Wellcamp and Westbrook PFGAs. The identification of these PFGAs assist in long-term planning, effectively managing urban expansion and preventing haphazard development beyond 2046.

Assumptions (Dwelling Projections)

The table below provides a summary of the planning input assumptions applied in both the base case (BAU) and final scenario for ShapingSEQ 2023.

Table 1315 - Summary of Input Assumptions for Base Case (BAU) and ShapingSEQ 2023 Final Scenario

No.	Planning Assumptions	Base Case (BAU)	Final ShapingSEQ 2023
1	Ultimate development (Maximum zoned capacity) sourced from Local Government LGIP Planning Assumptions (including the adopted Logan Flood TLPI and its impact on dwelling supply)	✓	✓
2	Regional population projections as control totals at SEQ level per 5 yearly cohort	✓	✓
3	Financial Feasibility Model (FFM) assumptions - Internal Rate of Return at 18%	✓	✓
4	Adjustments to ultimate dwelling counts from Councils – If observed dwelling counts from Census 2021 are higher, then ultimate dwelling counts were adjusted to reflect Census	✓	✓
5	Assumptions for Waraba (Caboolture West) and Beerwah East	✓	✓
6	Development approvals		✓

7	Increase in residential densities around centres by applying ShapingSEQ 2023 minimum residential densities for centres		✓
8	Increase in residential densities around high frequency public transport stations, outside of high demand activity centres, by applying ShapingSEQ 2023 minimum residential densities		✓
9	Increased gentle density dwellings in Low Density Residential Zones across SEQ		✓
10	Transit supportive densities adjacent to specific planned high frequency public transport		✓
11	Regional Land Use Category changes (i.e., Urban Footprint additions)		✓
12	Updated dwelling capacity and take up rates for key Growth Areas		✓
13	Updated Transport Network Assumptions	✓	✓

Ultimate land and dwelling supply estimates – local governments

The most recent ultimate land and dwelling supply (maximum zoned capacity) estimates were sourced from all 12 local governments across SEQ. Due to variations in the availability of data provided by the respective local governments, the currency of the sourced information was found to differ across LGAs. The ultimate dwelling supply estimates of local governments form an integral part and input into the MULTI. The land and dwelling supply data provided by local government is primarily prepared for the purposes of a LGIP and generally incorporates capacity that is included in the local planning scheme, other statutory development schemes (e.g., priority development areas) and development approvals granted at the time of the preparing the data.

Regional population projections

As previously mentioned, ShapingSEQ 2023 Population Projections presented as regional population growth control totals per five yearly cohort incorporates the most recent information on migration to Queensland up to September 2022, along with higher migration assumptions in earlier years based on the latest forecasts from Commonwealth Treasury (May 2023 Budget). The ShapingSEQ 2023 Population Projections utilises a similar method to the Queensland Government population projections, but considers the most recent actual population growth to 2022.

Financial Feasibility Model (FFM) assumptions

The FFM is used to assess realistic availability of planned dwelling supply based on internal rate of return (IRR) of residential sites in consolidation areas. An IRR over 20% indicates high feasibility as outlined by AHURI (2022), an IRR between 0-20% indicates intermediate feasibility, and an IRR below 0 indicates low feasibility. The IRR also varies based on type of product being delivered and on feedback received as part of developing the LSDM 2021.

The IRR is integrated into MULTI to incorporate the essential factors influencing the decision-making process of the development industry. In response to consultation feedback, the initial internal rate of investment return was adjusted from 7% to 18% to align with market expectations.

It should be noted that the application of the IRR for the LSDM is different to the MULTI. The LSDM report classifies supply into three categories to report on supply that was unfeasible, marginally feasible and feasible. For the MULTI sequencing component, the percentage applied is not a hurdle rate where anything below 18% isn't available for take-up. Rather the 18% is used to prioritise areas above 18% first and then when they are taken up the model will allocate growth to the other areas below 18%. No supply is removed from the model at all. Moving the component to 18%, with the other sequencing factors (approvals and infrastructure sequencing) would simply change the sequence slightly across the region only.

Adjustment to local government ultimate dwelling supply count

The QLUAD is a component of MULTI that estimates the existing count of dwelling supply at a land parcel level across Queensland. The QLUAD is validated against ABS Census 2021 dwelling counts. Minor discrepancies were identified between the land and dwelling supply data supplied by Councils and QLUAD for the existing 2021 development, and these where adjusted. For instance, where QLUAD dwelling counts were higher than the ultimate dwelling counts, ultimate development were adjusted to reflect existing dwelling count at June 2021.

Development approvals

Development approval data takes precedence over ultimate dwelling counts when the approval exceeds the ultimate count. This means that the ultimate dwelling count is adjusted where development approvals are higher than the ultimate development. This approach is consistent with most modelling approaches and is integrated into MULTI to ensure the model reflects the most likely development yield in the short term. Further refinements have been made to the DA data applied to the final model run to better represent realistic development scenarios. These refinements include:

- » The removal of lapsed development approvals,
- » The removal of approvals under the Reconfiguring a Lot (RaL) category that are within the same lot of the Material Change of Use (MCU) approvals.
- » Adjustments made to remove approvals that have lapsed, volumetric subdivisions in high density zoned areas for detached, and removing completed development approvals (as only uncompleted lots are required).
- » Uncompleted lots approvals are classified as detached dwellings.
- » MCU approvals have been classified as attached.

The following approval datasets were used:

- » Queensland Treasury, QGSO: Material Change of Use (MCU approvals for multiple dwellings (unconstructed) as of June 2023.
- » QGSO uncompleted lot (i.e., reconfiguring a lot) development approvals as of June 2023.

Additional growth areas

Local government provided land supply databases were used as well as data relating to growth areas such as State Development Areas (SDA), Residential Growth Areas (RGA) and Priority Development Areas (PDA). All PDAs are included in the base case (BAU) and alternate scenario models as these are statutory areas for urban development at the time of the review. Council data is utilised in the base and alternate scenario as these have the attached and detached dwelling split.

RGAs from the LSDM are to be included in the base case (BAU) scenario where:

- » it is a PDA or statutory boundary
- » zoned for residential purpose and included in Council planning assumptions; or
- » have development or development approvals.

Dwelling supply data from Council land supply layers are used for RGAs. Caboolture West NDP1 area is included in the base case (BAU) case scenario and uses Council land supply data. The following RGAs have been included in the assumptions for the MULTI:

- » Beerwah East SEQ Development Area
- » Elimbah North
- » Pine Valley – Preliminary Approval
- » Southern Thornlands
- » Waraba (Caboolture West) Interim Structure Plan Area
- » Waraba (Caboolture West) Balance Area
- » Waraba (Caboolture West) NDP1
- » Elimbah East preliminary approval

> » Moreton Bay Regional Council Emerging Community outside of Ability to Service

Residential densities around centres and high frequency public transport stations

Additional dwelling supply was allocated in proximity to centres and high frequency public transport stations to support the consolidation policy initiatives of ShapingSEQ 2023. Additional dwellings were provided relative to the high demand principal and major regional activity centres in SEQ to meet the minimum dwelling density targets identified in ShapingSEQ.

The following rules-based approach was applied to determine the dwelling unit per hectare density assumption in proximity to high demand centres:

> » Principal regional activity centre –
>> o 150dw/ha within 400m
>> o 100dw/ha within 400m-800m.
>
> » Major regional activity centre –
>> o 80dw/ha within 400m
>> o 40dw/ha within 400m-800m.

The demand component of the MULTI model was used to determine the centres with highest demand by SA2.

An increase in residential densities around high frequency public transport stations (outside of high demand activity centres) was also applied within the MULTI according to the following rules-based approach:

> » Bus –
>> o 80 dw/ha within 200 metres
>> o 60 dw/ha within 400 meters
>> o 40 dw/ha Within 800 meters
>
> » Rail –
>> o 150 dw/ha within 200 meters
>> o 100 dw/ha within 400 meters
>> o 50 dw/ha Within 800 meters
>
> » Sunshine Coast Regional Council Mass Transit –
>> o 150 dw/ha Within 200 meters
>> o 100 dw/ha within 400 meters
>> o 50 dw/ha Within 800 meters
>
> » City of Gold Coast Light Rail –
>> o 150 dw/ha Within 200 meters
>> o 100 dw/ha within 400 meters
>> o 50 dw/ha Within 800 meters

Stations within the Principal/Major Regional Activity Centre Network were excluded within 100m of the centre zones.

Non-urban zones were excluded from both assumptions above.

Gentle Density

Additional dwellings were added to the low-density residential zones across SEQ. The below local government areas that had higher financial feasibility within existing urban area for attached dwellings had an additional 10% added as attached dwellings:

> » Brisbane
> » Gold Coast

- » Sunshine Coast
- » Noosa
- » Redlands
- » Moreton Bay

The remaining local governments with lower financial feasibility in the consolidation area had the additional 10% as detached dwellings. A rule of 800sqm minimum applied for the attached additional dwellings and 1000sqm minimum applied to the detached additional dwellings added. For example, all properties with 1000sqm or over were selected within a low-density residential zone. The total detached dwellings in each local government's land supply database provided at ultimate were summed. A total of 10% was added to the ultimate to increase the detached supply for gentle density product.

Gentle density is explained further in the following chapter.

Updated Transport Network Assumptions

The TMR base and reference network was the starting point for the modelling work undertaken for ShapingSEQ 2023 between 2026–2046. There were changes made following the modelling runs to the networks and services used to better align the network assumptions to the Region-Shaping Infrastructure (RSI) projects and to improve the network performance around key growth areas identified.

Some of these changes include:

- » Bringing forward various rail and road infrastructure (Direct Sunshine Coast Rail, Gympie Road Bypass, Park Ridge Connector).
- » Extension of the Park Ridge Connector and the Direct Sunshine Coast Rail from Beerwah to Caloundra to Beerwah to Maroochydore via Kawana.
- » New public transport services from Broadbeach to Robina via Bond University.
- » Improved connectivity between Strathpine and inner Brisbane.
- » Brisbane Metro increased capacity and services.
- » Increased services to align with Logan to Gold Coast Faster Rail.
- » Increased network resolution to support key growth corridors.

Regional Land Use Categories

The South East Queensland Regional Plan 2009-2031 encouraged compact urban form through the three regional land use categories (RLUC) of Urban Footprint, RLA and the RLRPA. These were supported by the South East Queensland Regional Plan 2009–2031 State Planning Regulatory Provisions (SEQSPRP) to create an outward limit to urban development.

ShapingSEQ 2017 since carried these regional land use categories through, and they have been maintained in ShapingSEQ 2023.

Urban Footprint

The Urban Footprint identifies the extent of land required to accommodate the region's urban growth to the projected year. In ShapingSEQ 2023, the Urban Footprint identified is the land required to meet the region's urban development of 2046.

ShapingSEQ 2023 has included a number of Urban Footprint changes in response to residential and employment need. **Error! Reference source not found.** sets out changes to the area planned for urban development since 2005 through regional plan reviews and various statutory processes including Priority Development Areas (PDAs), master planned areas and development approvals. These areas have added significant capacity to the Urban Footprint.

Table 1416 - Additions to the Urban Footprint and equivalent changes, 2005 to 2023

2005 to 2006	2006 to 2009	2009 to 2017	2023
+7168 ha	+10,989 ha	+12,959 ha	+5,000 ha
Inclusions: Part of Park Ridge Part of Yarrabilba Part of Flagstone Jimboomba Logan Village Bahrs Scrub Harrisville Peak Crossing Other minor additions	Inclusions: Part of Park Ridge Elimbah industrial Part of Port of Brisbane Buccan part of Fernvale Gatton North Significant additions in Toowoomba due to SEQ boundary change	Inclusions: Part of Yarrabilba PDA Part of Flagstone PDA Caboolture West Southern Redland Bay development approval Other significant urban amendments to council planning schemes (e.g. Flinders and Jimboomba)	Inclusions: Elimbah Southern Thornlands Parts of Brisbane (Deagon, The Gap, Mitchelton, Nudgee and Rochedale) Part of Stapylton Redland Bay Business Park Part of Harrisville and Glen Eagle Part of Thagoona Parts of Burpengary East and Narangba Part of Cooroy Parts of Yandina Parts of Toowoomba (Meringandan, Westbrook, West Toowoomba, Gowrie Junction and Wellcamp)

Rural Living Area

The (RLA) identifies key locations in the region for rural residential development. It consolidates rural residential development in suitable locations providing for housing and lifestyle choice, while limiting the impact of its inefficient use of land on other values, functions and opportunities in SEQ. Generally, these areas are already designated for future rural residential purposes in planning schemes.

The RLA is an important land use management tool to ensure that land is efficiently utilised, prevents scatted communities and ensures maximisation of existing infrastructure.

The RLA contains existing rural residential areas or could accommodate future rural residential development.

Regional Landscape and Rural Production Area

The RLRPA is where SEQ 's important rural areas, natural areas, natural landscapes and major environmental assets exist. It also includes areas where urban development may not be supported for other reasons, such as the inability to cost-effectively service an area with infrastructure or because of other constraints such as flooding or native vegetation.

There are limitations on the type of development that can occur in this area in order to protect it, however private dwellings and other activity necessary to support rural communities and their economies may be allowed, subject to local government planning schemes and the assessment of development.

Subdivision in this area is also limited to ensure that biodiversity networks, agricultural land and potential future growth opportunities are not broken into small land parcels that might diminish these functions or values.

The types of values and functions in the RLRPA include:

» areas with significant biodiversity
» regional ecosystems that are endangered or of concern
» other areas of environmental significance including native forests, coastal wetlands and formal reserves and national parks
» koala habitat
» good quality agricultural land and other productive rural areas
» cultural and landscape heritage values (traditional and non-indigenous)
» water catchments, water storages and ground water resources
» natural and economic resources, including extractive resources and forestry plantations
» scenic amenity values
» interurban breaks.

To support rural communities and their economies, a range of other activities are also supported. These are subject to local government planning and assessment, and include, agricultural production, access to natural resources, water storage, limited commercial, retail and industrial uses, tourism activities, outdoor recreation, and nature conservation.

Regional Land Use Category Changes Methodology

A detailed methodology has been used for the assessment of, and decision-making around RLUC change requests across SEQ. It includes consideration of:

» the overarching policy framework of ShapingSEQ 2023
» whether there is adequate supply of land available to accommodate the dwelling supply targets to 2031
» and 2046 and diversity sub-targets to 2046 for each LGA – as informed by the MULTI
» key constraints and opportunities including environmental protection, access to Region-Shaping Infrastructure (RSI), natural hazards and ability to deliver housing quickly
» the RLUC guiding principles in the current ShapingSEQ 2017, draft and final ShapingSEQ 2023.

The new Urban Footprint areas have been added to address an identified undersupply of expansion land in the northern corridor. The identification of this new expansion area resulted from a detailed analysis of hard constraints, subregional market needs, local expansion growth projections, local market expectations, existing and future infrastructure provision.

The following constraints and values were considered as part of changes made to the Urban Footprint and to understand developability of the expansion areas:

» Flood and coastal hazard overlays

» Bushfire hazard overlays

» Landslide overlay – slopes > 25%

» Various infrastructure-related overlays including state-controlled corridors, major electricity corridors and stations and local level major infrastructure such as gas, oil, high-voltage electricity, water storage, and sewerage treatment

» State heritage features

» High value environmental layers including Category A and B endangered regional ecosystems, Category A Regulated Vegetation, Marine parks, Fish habitat A and B, Protected areas (estates and nature refuges), High ecological significance wetlands, Legally secured offset areas, Wildlife habitat endangered and vulnerable, Wildlife habitat species least concern and Koala habitat.

» Environmental (very high value) overlays

» State and local government waterway and wetland overlays

» Proximity to Priority Infrastructure Area boundary or Current Intent to Service Layer

» KRAs or KRA separation area / transport route separation area

» Agricultural land (within Important agricultural areas, within Class A and B areas, Current agricultural use layer and whether an area is in proximity to an intensive agricultural use)

» Non-urban zoning.

Both local governments and state agencies were consulted as part of the RLUC review process, and received an information pack detailing submissions considered for a RLUC change at both consideration stage, and finalisation of the project. Local governments and state agencies were provided an opportunity to provide feedback on submissions considered during the process.

Policy Directions in ShapingSEQ 2023

ShapingSEQ 2023 incorporates targeted policy responses and directions within the Grow theme to address housing supply over the short, medium and long term. These include:

» Setting targets for dwelling supply and diversity across various locations, including in areas that are highly accessible and in proximity to a variety of features to support increased levels of amenity.
» Identifies specific policy interventions to address specific issues or locational based planning barriers to achieving dwelling outcomes.
» Supports increased low to low-medium density residential development across the region.
» Provides policy to guide future planning and delivery undertaken by local governments, State Government and industry.
» Sets a target to increase the available social and affordable housing, providing access to homes to more people in more accessible places.

Further detail on the above responses are provided in the following sections.

Outcome 1: Efficient Land Use

The following section details the range of investigations and analysis which both informed the sizing of the Urban Footprint and ensures an efficient use of the urban footprint where identified for residential development. It addresses key pieces of analysis in terms of Existing Urban Boundary and Underutilised Urban Footprint and new policies which direct and support the efficient use of land into the future, including High Amenity Areas and assumed residential densities.

Existing Urban Area Boundary (Consolidation Area)

The SEQ Consolidation Area formerly known as the Existing Urban Area (EUA) provided a special purpose statistical area used in ShapingSEQ 2017 for defining dwelling supply benchmarks in ShapingSEQ and tracking consolidation and expansion development. Consolidation refers to development occurring on land inside the EUA boundary, previously known as 'infill development', while expansion refers to development outside the EUA boundary, previously known as 'greenfield development'. The EUA was originally created by the former Office of Urban Management in 2005 for the purposes of monitoring and reporting infill and redevelopment activity against SEQ Regional Plan 2005–2026 dwelling targets. It was revised by the former Department of Infrastructure and Planning at the time of development of the SEQ Regional Plan 2009–2031 and subsequently translated to reflect ABS 2016 SA2 boundaries for ShapingSEQ 2017. The EUA includes Moreton Island, North Stradbroke Island and Southern Moreton Bay Islands SA2s (formerly known as Scarborough – Newport, Moreton Island and Redland Islands).

Any residential development occurring within the EUA is considered consolidation. This includes both detached and attached housing, development on vacant land or redevelopment of an existing site to increase density or change the land use from non-residential to residential. Development outside the EUA is taken to be expansion development, but again may include both detached and attached housing development.

To distinguish consolidation from expansion development, the Existing Urban Area (EUA) boundary was developed and used. Consolidation refers to development occurring on land inside the EUA boundary, previously known as 'infill development', while expansion refers to development outside the EUA boundary, previously known as 'greenfield development'. This is maintained as part of ShapingSEQ 2023 but renamed the consolidation area.

The EUA served the primary purpose of measuring and reporting on dwelling supply activity, using published ABS building approval data that is available at a SA2 level, and to compare this with dwelling supply targets. It is not a tool for regulating development.

The ShapingSEQ 2017 EUA is based on ABS 2016 Statistical Area 2 (SA2). The geographical boundaries are sourced from Edition 3 of the Australian Statistical Geography Standard (ASGS) and defined by the ABS. The 2021 version of boundaries for LGAs is used. The 'Toowoomba - Urban Extent' region comprises all Toowoomba Regional Council SA2s which are also in the Toowoomba SA4.

SA2s are used to define the EUA because it presents the only statistical area level that provides for a consistent land supply and development activity information across SEQ. The EUA covers an area that mostly comprise of

large contiguous built-up urban areas, including land in urban subdivisions and areas serviced by reticulated sewerage.

Given changes in SA2 boundaries after the 2021 Census to reflect population and urban growth, a revised EUA for ShapingSEQ 2023 was needed. Multiple alternative opportunities investigated and considered in response to these changes. However, the revised EUA for ShapingSEQ 2023 was used to inform strategy 1.1 retains more of the SA2s of the current EUA, but with the following exceptions:

» Removal of Moreton Island, North Stradbroke Island and Southern Moreton Bay Islands SA2s (formerly known as Scarborough – Newport, Moreton Island and Redland Islands).
» Addition of 19 SA2s into the SEQ Consolidation Area:
- Thornlands
- Pallara - Willawong
- Coomera
- Ormeau (East) - Stapylton
- Pimpama - South
- Upper Coomera - North
- Collingwood Park - Redbank
- New Chum
- Redbank Plains
- Springfield
- Springfield Lakes
- Augustine Heights - Brookwater
- Bellbird Park
- Murrumba Downs - Griffin
- Kallangur
- Mango Hill
- North Lakes
- Darling Heights
- North Toowoomba - Harlaxton

The 19 SA2s were added because each SA2 contained SA1s that reflected large contiguous built-up urban areas as evidenced from desktop analysis, a smaller average land parcel size that are indicators of population and urban density respectively, and further contained 'Education', 'Commercial', 'Hospital/Medical', 'Industrial' or 'Transport' land uses as derived from ABS Meshblock.

Appendix A explains the revisions of the EUA boundary, which have occurred to facilitate measurement of consolidation and expansion development over time.

The existing consolidation area for 2023 in provided in the figure below.

## Consolidation / Expansion Dwelling Growth Ratio

The EUA or consolidation area boundary is a convenient measurement tool to support strategic planning from the regional level. It does not directly provide a basis for land use planning decision-making at a locality or site level because it is a statistical rather than land use boundary.

ShapingSEQ 2023 encourages growth within the consolidation area, where accessible and supported by the right infrastructure. Updates to the regional plan provides a strategy that supports further consolidation and to work towards an aspirational target for achieving 70% of new homes in the consolidation area and 30% of new homes of the expansion area over the planning horizon.

The current consolidation/expansion dwelling growth ratio was not published in ShapingSEQ 2023. Sizing of the SA2s have previously been identified as a challenge when defining the consolidation area. SA2 boundaries aren't always in alignment with existing built-up urban areas, especially on the edge of large urban areas as observed from aerial imagery. Given the difficulties with maintaining an accurate boundary, and the changes to the SA2 boundaries that will occur overtime, future amendments to this initiative will be considered as part of ongoing reviews of ShapingSEQ.

Dwelling targets are no longer presented in terms of consolidation and expansion.

Figure 14 - Consolidation Area 2023
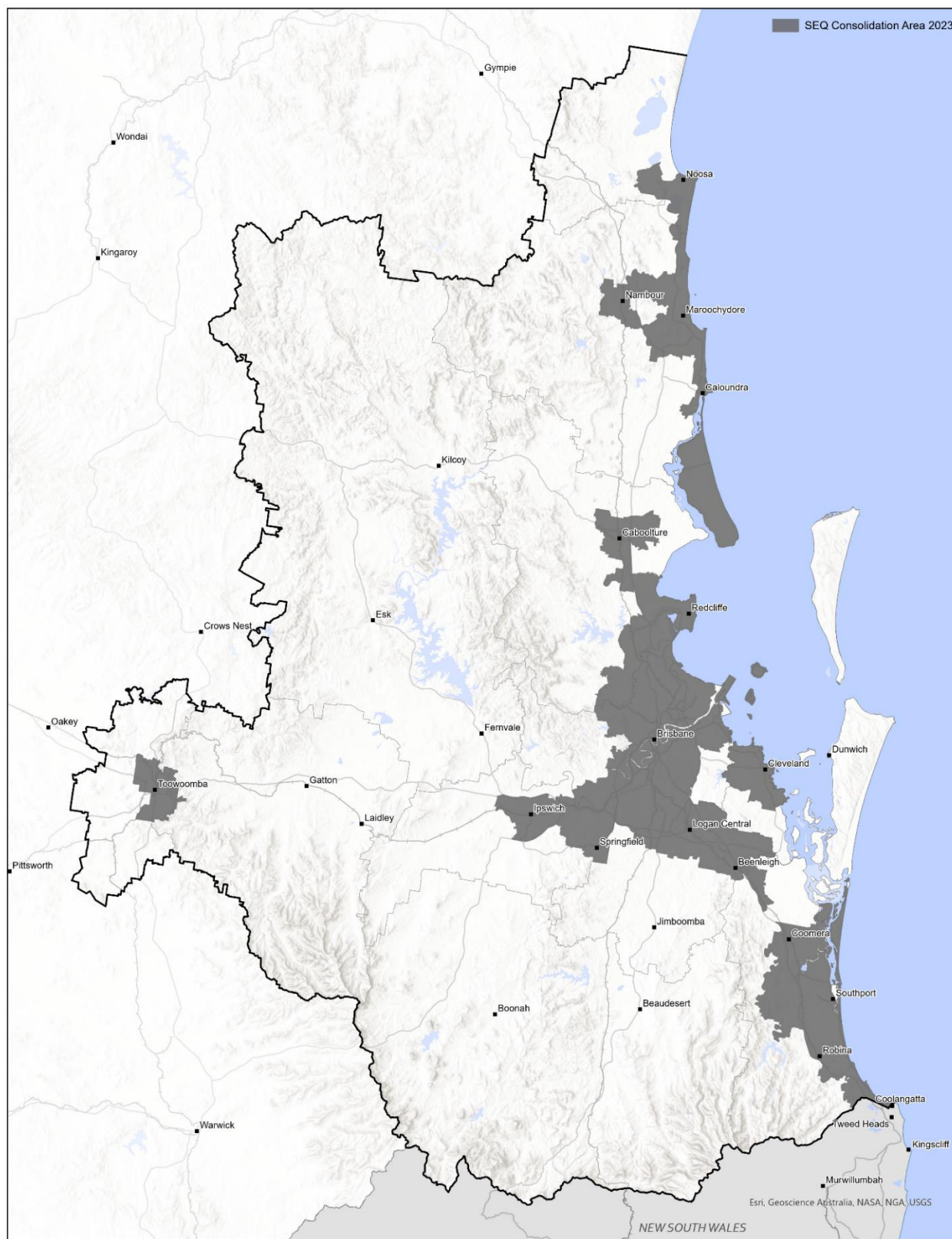
Underutilised Urban Footprint

To ensure that a realistic supply of land for urban purposes is available, it is necessary that land identified for urban purpose is capable of being delivered in the time horizon of the plan. The Urban Footprint contains areas that are identified for urban purposes under a local planning instrument that remain undeveloped or underutilised for urban purposes. These areas are referred to as UUF. This land is generally recognised as being suitable for urban purposes within the relevant planning instruments and documents (e.g., planning schemes and Net Serv Plans). However, for a range of reasons these areas are stalled, or progressing at a significantly slower rate than anticipated by previous regional plans. It is also possible that some of these areas are incorrectly recognised as suitable for urban uses, in particular urban residential purposes (i.e., dwellings).

A key implementation action from ShapingSEQ 2017 was to undertake evaluations of UUF areas in the Urban Footprint. Discussions with local governments, infrastructure providers and the development industry indicate the following major barriers to achieving meaningful development of these areas:

  » difficult, complicated or expensive infrastructure agreements

  » delayed local area or structure planning

  » extensive fragmentation

  » existing uses inconsistent to urban development (intensive animal farming)

  » constraints such as flooding and vegetation

To support the implementation of ShapingSEQ 2017, a UUF Background Paper was completed which investigated UUF areas to identify why they have not been developed for urban purposes in line with growth assumptions, and identify potential responses. Data was collated from current planning, assumptions and yields found in planning scheme provisions, LGIP's and Net Serv Plans. The areas were reviewed in terms of current planning, infrastructure and development issues. The department undertook consultation with stakeholders including local government, peak industry bodies and service providers.

The analysis identified:

  » the issues which are affecting UUF areas;

  » differing opinions regarding levels of constraint; and

  » an understanding of assumed take-up rates (time to develop for urban purposes) and yields (numbers of dwellings).

The UUF Background Report provided key findings in relation to UUF and a range of policy responses to assist in unlocking these areas.

The department progressed these findings to identify 75 UUF areas and are obtaining a more realistic understanding of land supply capacity in these areas. A number of constraints were identified in these areas, including mapped koala habitat, flooding, infrastructure and land zoned for non-residential uses (industry, open space, conservation etc.).

Of the sites identified, further interrogation was undertaken to assess the quantum of supply in these areas in the context of total supply for the region. The UUF sites were categorised into the following:

  » utilised – land that is mostly developed with minimal developability.

  » light barriers – some barriers were identified that can be largely overcome and are likely to be developed in the next 5 - 10 years.

  » moderate/significant barriers – has significant/multiple constraints to overcome.

  » oversized – large amounts of land and likely premature in nature (located in regional areas).

  » unrealisable – limited development potential.

The dwelling supply data supplied by local governments was utilised to determine the dwelling supply numbers within UUF areas.

All UUF areas are included in the base case (BAU) and preferred growth pattern where:

  » not identified by GAT as 'unrealisable' and 'moderate/significantly constrained'; and

  » are zoned in an urban area for urban purposes in a planning scheme.

Where inconsistent with the above, any dwelling supply allocation in the council land supply data was removed as informed by recent assessments on the realistic availability of the supply undertaken by GAT. The learnings from UUF have been applied in the analysis going forward ensuring that we are increasingly realistic about the availability of land for new homes.

As part of the review of ShapingSEQ, the department reviewed a total of approximately 27,000 hectares of UUF land across SEQ intended for development but not realising their development potential. Through further analysis, it was identified that approximately 6,000 hectares of land had moved through development activity to being developed, 1,300 hectares is not realisable and approximately 19,700 hectares could be developed with appropriate intervention. The department reviewed possible interventions for these sites. It is noted that interventions passed under the Housing Availability and Affordability (Planning and Other Legislation Amendment) Bill 2023 seek to optimise the planning framework's response to current housing challenges have been informed by this review and may assist with unlocking land in the UUF.

SEQ Development Areas

Regulatory provisions associated with ShapingSEQ (hereon referred to as SEQ regulatory provisions) currently apply to the following areas in the region:

>> Regional Landscape and Rural Production Area (RLRPA)

>> Rural Living Area (RLA)

>> SEQ development areas.

Over the course of five years, the SEQ regulatory provisions have proven to be robust, without the need for significant amendment (see Schedule 10 parts 15 and 16 and associated definitions within Schedule 24 of the Planning Regulation). The SEQ regulatory provisions play a crucial role in ensuring ShapingSEQ policy is delivered through the planning and development assessment process.

Regulatory provisions for SEQ Development Areas (Schedule 10, Part 15) were amended in December 2023 to support the designation of additional SEQ Development Areas identified within ShapingSEQ 2023. These locations were introduced in ShapingSEQ and are accompanied by additional protection measures to support their contribution to the regional economy.

These provisions serve the purpose of restricting further development, including subdivision activities, in order to safeguard against premature or ad-hoc development that could compromise the area before its future planning intent has been fully established.

ShapingSEQ 2023 has identified additional SEQ development areas for both future residential and employment land supply. Consistent with strengthened policies under the regional plan, variation requests within SEQ development areas are considered unacceptable in the absence of State or local government structure planning being undertaken. This ensures that the regulatory framework remains responsive to the evolving needs and goals of the SEQ region.

High Amenity Areas Framework

Amenity is an important factor that influences where people choose to live. This can include the character of a neighbourhood, commuting time and cost and distance from other amenity contributors including open space and accessibility (to jobs, significant green and blue places/spaces, cultural elements etc.), transport, economy/economic performance, cleanliness, visit/dwell time and general greenness.

The regional plan provides an amenity-based policy framework that draws on the Victoria Planning Authority (VPA) Amenity-Based Density Model. The VPA model directs housing density closest to features such as open space, activity centres, community facilities and access to public transport and infrastructure. The VPA model guides increased density in 400m walkable catchments of activity centres and train stations and is within proximity to open space, biodiversity conservation areas and the Principal Public Transport Network or similar.[42] The model is outlined in the Precinct Structure Planning Guidelines and is intended to inform place-based structure planning to identify high amenity areas where higher densities can be applied.

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[42] Victoria Planning Authority (2021). Precinct Structure Planning Guidelines: New Communities in Victoria

Department of State Development, Infrastructure, Local Government and Planning

The regional plan also includes an amenity-based policy framework to increase density and diversity in key locations where growth is more able to be supported.

To facilitate meeting the dwelling supply and diversity targets, ShapingSEQ 2023 introduces a high amenity area framework. This framework uses a 'multi-criteria' analysis approach to identify locations where housing density and diversity can be directed. These are higher amenity locations where communities are supported by key features such as critical access to high frequency public transport, community facilities, open space and activity centres.

Priority Action 2 requires the Queensland Government to lead the identification and application of the high amenity areas framework through the development of an advanced multi-criteria analysis. Criteria that may be considered through the analysis process include:

» Accessibility/Transport

– Proximity to high frequency train and/or bus station

– Areas where there are at least two forms of transport (car, bus, train, cycling)

– Areas with lower average travel time

» Natural Assets

– Proximity to significant greenspace/park or waterbody (canal, river, ocean)

– Landcover vegetation percentage

– Scenic amenity and vistas within the existing urban area

» Economic Activity

– Proximity to a Major and/or Principal Activity Centre

» Social

– Proximity to community and health facilities including public halls, libraries, health precincts and educational establishments.

– Socio-economic index levels

» Market Demand

– Property valuation comparison to provide a market dimension as an indicator of demand for an area. Valuation captures the value people place on an area and is being used as a comparative measure of household demand for areas across the high amenity functional criteria.

The above criteria will be further refined and weighted in collaboration with local governments, state agencies and utility providers prior to identifying these areas of high amenity spatially. The areas defined will be of focus in determining localised policy interventions, plan-making and development assessment processes most appropriate to promote additional supply.

Supporting the high amenity areas framework is the inclusion of guidance for minimum dwelling density ranges for specific locations deliver high levels of amenity, services and accessibility – PRACs, MRACs, and high frequency public transport stations/stops.

A review of multiple jurisdictions, particularly where infill and established area growth is a key objective, have set density requirements. These density requirements are usually in particular areas where higher intensity growth is favoured.

The introduction of the density guidance under Table 1 in ShapingSEQ 2023 was influenced by the Precinct Structure Planning (PSP) Guidelines 2.0 for Victoria: New Communities, provide the framework for preparing Precinct Structure Plan, undertake by the VPA. The VPA have introduced targets which focus on delivering *Plan Melbourne's* 20-minute neighbourhood principle within the PSPs which seek to provide greater dwellings around town centres and at key areas of amenity.[43]

These minimum densities build on previous guidance in ShapingSEQ 2017 to more targeted strategies for both centres and along high frequency transport networks.

[43] Victorian Planning Authority (2021). Precinct Structure Planning Guidelines – New Communities in Victoria

The desired densities for PRACs and MRACS have previously been achieved within or near these centres (particularly in Brisbane), but not universally. It is acknowledged that outer suburban regional activity centres have lower prospects for feasible, higher density, residential development. It is expected that these density ranges will be tested and applied appropriately through local planning and as such will vary within these ranges depending on the nature, maturity, infrastructure and services in each area.

The minimum densities are to be used as a guidance tool and reflects Table 1 in ShapingSEQ 2023 is shown in the table below.

Table 1715 - High Amenity Areas Minimum Densities

Where high amenity area includes:	Minimum residential density
Principal Regional Activity Centre (PRAC) • **High amenity PRAC** • **Other PRAC**	300 dw/ha – 400 dw/ha 100 dw/ha – 400 dw/ha
Major Regional Activity Centre (MRAC)	40 dw/ha – 200 dw/ha
High frequency public transport stations/stops	40 dw/ha – 80 dw/ha (bus) 50 dw/ha – 150 dw/ha (rail/busway)
Where located outside the above areas	As determined by local government

Residential density in new communities

New communities will continue to be established to meet the region's housing needs.

To minimise ongoing pressure for outward expansion, we will also need to ensure the efficient use of expansion land. A variety of lot sizes will facilitate a wider variety of housing, including higher density and attached dwellings.

Expansion areas will be developed to include a mix of uses, densities and employment opportunities for future residents. Public transport will be incorporated into new development and existing or future high-frequency public transport should be developed in accordance with transit-oriented development principles.

To ensure new expansion development makes the most efficient use of land, particularly given the outlay of infrastructure costs to service expansion areas, ShapingSEQ 2023 identifies a minimum net residential density of 20-30 dwellings per hectare for new communities in SEQ and 40-80 dwellings per hectare where within easy walking distance to an existing or proposed public transport station. These minimum densities do not however apply to the Lockyer Valley, Scenic Rim and Somerset local government areas as primarily rural localities.

This strategy relating to densities in new communities was maintained within ShapingSEQ 2023 from 2017 and updated to reflect more realistic requirements for these areas.

Rural Residential uses in the Rural Living Area

Rural residential development is supported in a variety of defined locations throughout the region. Rural residential development provides a lifestyle choice for residents and can also offer opportunities to operate small commercial enterprises. This housing choice is particularly important to rural areas where a rural or semi-rural lifestyle is often a high priority for residents. However, rural residential development is not supported in urban growth corridors due to fragmentation and the consequential constraints created for urban growth and infrastructure provision.

Future housing needs are to be met and opportunities for economic growth and diversification are to be accommodated, but in a way that retains the distinct rural identity. Growth also needs to be accommodated in a way that avoids putting pressure on surrounding natural and agricultural resources and values. This will require the concentration of residential and rural residential development in existing rural towns and villages and identified RLAs.

Potential Future Growth Areas

Areas identified as PFGAs may be needed to accommodate long-term urban growth. These areas are not required to accommodate the dwelling supply targets or employment planning baselines identified in ShapingSEQ 2023.

Identification of these areas is not a development commitment, nor does it imply that all, or any part of these areas, will be made available for urban development in the future.

The intent is to protect their future potential, not to promote or support their investigation for urban purposes during the life of the regional plan, unless ongoing monitoring as part of the GMP indicates there is an inadequate land supply and the targets or baselines may not be accommodated in the Urban Footprint.

If any area of a PFGA is required to accommodate future urban growth, and the area is determined suitable for future development, the Minister for Planning may consider whether a statutory instrument is necessary to coordinate land use and infrastructure planning, or support other desired outcomes for the area.

The PFGAs are considered logical extensions of the Urban Footprint that provide housing supply for growth across the region and in particular, for detached homes, only when they are needed. The PFGAs included in ShapingSEQ 2023 are in locations which were shown to have limited capacity to 2046 and where demand for detached dwellings exist, or to address the regional need for industrial land. It should be noted that PFGAs do not automatically trigger future Urban Footprint expansion, but identifies area for future investigations where supply is likely to be needed.

PFGAs are not identified with a cadastral boundary in ShapingSEQ 2023. If required, any future investigation looking at similar areas for future growth is likely to consider different boundaries based on more detailed local information.

Future reviews of the regional plan will consider the role of PFGAs moving forward.

Outcome 2: Housing Supply

Dwelling Supply Targets

Dwelling supply targets have been updated in ShapingSEQ 2023 to reflect up to date population, demographics, and household projections assessed against the regions ability to meet housing needs serviced by planned transport infrastructure.

ShapingSEQ 2023 acknowledges that the challenge of increasing the supply of residential housing is not just a matter of releasing more land and building more houses. Housing must also be suited to the needs and the means of current and future residents. We need housing options which offer a choice of dwelling size, tenure type and price.

The regional plan not only includes targets for housing diversity, but the plan also includes directions and guidance for local governments on how they could deliver more diverse housing, including more gentle density, and provides industry tools and direction for the delivery of this product on the ground.

Dwelling supply targets have been determined through a sophisticated and nation-leading approach of integrated land use and transport modelling – called the MULTI. The approach is built on the data and information provided by state and local governments and enables the ability to identify and analyse the following:

» Supply and demand – capacity in planning schemes and demand factors that influence where households would choose to locate.

» Supply and realistic take-up – informed by financial feasibility to deliver development and current and planned infrastructure.

» Land use and transport integration – supply for new homes and existing and planned transport infrastructure to provide for more homes closer to transport and infrastructure investment.

» Employment accessibility – Future growth in proximity to employment locations across SEQ to support shorter commutes, improved environmental outcomes and thriving businesses.

Methodology overview

The dwelling supply targets were derived from the MULTI considering the following:

» Size: ultimate dwelling supply (i.e., maximum zoned capacity).

» Mix: the dwelling typology composition of supply.

» Speed: realistic rate of development (i.e., take up rates).

» Development feasibility (i.e., realistic availability) of supply.

As previously outlined, the MULTI draws upon a number of elements from micro and macro levels already utilised by government to produce the dwelling projections (or targets). The key inputs to produce the dwelling supply targets include population projections by age group, dwelling projections by type, enrolment projections by type, employment projections by industry/occupation and transport model demographic data. In addition, micro level models from Council Urban Growth Models, Utility Provider Infrastructure Planning Modelling, and QLUAD are used to inform land use, infrastructure, and ultimate development (maximum zoned capacity), and in turn produces the dwelling supply targets.

MULTI requires ultimate (i.e., maximum zoned capacity) attached and detached planned dwelling supply inputs to the MULTI land supply component. The base case (BAU) scenario was then subject to the inclusion of growth areas and other alternate scenario policy initiatives as identified in the previous section of this report and in accordance with the policy outcomes to be achieved under ShapingSEQ 2023. The base case (BAU) model results informed the timing, type and location of additional sources of supply that was needed. The preferred growth pattern (scenario) supports the policy and initiatives as identified within ShapingSEQ 2023.

The land supply sequencing component of MULTI is also a key model element that determines the dwelling supply targets. This allocates growth, across the 25-year ShapingSEQ horizon, at a property level and includes:

» Take-up rates to provide a realistic take-up of growth based on the historical, existing and future planned dwellings.

» QLUAD to identify if a property is vacant.

» Financial Feasibility Model for the Internal Rate of Return (i.e., profitability) considering the development industry decision-making process, and cashflows throughout the development lifecycle at a property level.

» Ability to Service to identify if a property and a development has a current intent to be service with trunk infrastructure.

The dwelling supply targets include both occupied and vacant private dwellings. Private dwellings include structural dwellings (e.g., houses, flats, townhouses) but exclude temporary dwellings (e.g., tents, caravans). Non-private dwellings such as hotels and hospitals are not considered within the dwelling supply targets.

Short-term rental accommodation (STRA) (e.g., AirBNB) is a component of private dwellings, which are included in the dwelling targets. However, it is important to note that there is currently no clear and readily available data source that allows for the determination of the percentage of dwellings used for STRA in each local government area.

Occupancy rates are included in the MULTI and as a means to determine the dwelling supply targets. Occupancy rate figures for 2021 are derived from the Census 2021 and are based on persons counted in occupied private dwellings on Census night. Occupancy rates for the period from 2026 to 2046 are derived from a modelling process. Occupancy rates are determined by dividing the projected ERP residing in specific dwelling types (attached/detached) by the number of private dwellings (both occupied and vacant) in the corresponding reference year. It is crucial to note that the total ERP projections include individuals residing in non-private dwellings (such as prisons, aged care facilities, boarding schools) and non-structural dwellings (such as caravans, houseboats, and workers' accommodation). Consequently, multiplying occupancy rates by the number of dwellings will not equate to the total population. In addition, occupancy rates do not adjust in areas with high numbers of non-private dwellings, vacant dwellings, or small numbers of dwellings. The trend in occupancy rates has not been assumed and reflects the relationship between household, dwelling, and population projections, informed by the ShapingSEQ/ADM Projections used in ShapingSEQ 2023.

Monitoring

To support more sophisticated tracking of the degree of land use efficiency within the consolidation area and support the dwelling supply targets across the region, indicators will be used to monitor dwelling supply including the following:

- » Dwelling density
- » Number of lots by residential zone and size
- » Population density
- » Lot registrations.

Local governments are required to review and amend their planning scheme to meet the dwelling supply and diversity targets. This progress will be monitored over time by the GMP.

Minimum planned dwelling supply

Planned dwelling supply is based on estimates of the dwellings that have been or could be approved, based on current planning intent and the expected nature of demand and densities over time, to accommodate the region's expected dwelling growth, within consolidation and expansion areas.

In line with widely accepted planning practice, ShapingSEQ requires the maintenance of a minimum 4 years of approved supply and a minimum of 15 years of supply of land that has been appropriately zoned and planned to be serviced. This has also been carried over from the previous research undertaken as part of ShapingSEQ 2017.

Further information will be provided as part of the future LSDM report.

Residential opportunities on publicly owned land

A published outcome of the Housing Summit was an action by for the State Government to conduct an audit of State government-owned land and buildings for opportunities for residential use and partner with local governments and non-government organisations (NGOs) to identify similar opportunities for land and buildings owned by local governments and NGOs.

Local governments were invited to put forward their underutilised land and buildings that may be suitable for residential development.

A total of 27 parcels of land one hectare and over across nine LGAs had been identified. A process to shortlist smaller sites, particularly in regional centres, is also underway and close to being finalised.

The investigations of the shortlisted sites are to evaluate exactly what kind of development would be appropriate, and what other interventions and infrastructure would be needed to allow housing to be constructed.

Strategy 2.3 seeks to support residential opportunities on publicly owned land as a short-term growth response to housing need. This strategy promotes innovation at all levels of government through not only funding, but also planning interventions for government owned land to develop innovative housing models, such as new generation boarding houses, Community Land Trusts, shared ownership models and shared equity co-ops.

The regional plan supports further investigations for future housing opportunities on government-owned land. This includes government-owned land close to transport, services and employment which makes it well suited to affordable housing.

Outcome 3: Housing diversity

Dwelling Diversity Targets

The regional plan includes housing diversity targets that seek to promote and monitor the achievement of increased densities in key growth areas, closer to activity centres and along high frequency public transport corridors. Housing diversity targets compliment the dwelling supply targets to provide direction on the required mix of dwelling types needed to accommodate changing population and households by 2046.

A review of case studies was also undertaken to understand how population growth and dwelling targets have been applied elsewhere. A number of different interstate and overseas examples were identified which provided a broader understanding of potential benefits and implications of policy interventions for housing typology targets.

Key findings from this analysis include:

- » Modelled scenarios are important to understand how targets can move away from current trends and seek to support aspirational goals.
- » Targets can be applied in a number of ways and can also be limited to designated and identified areas as required which should provide increased ability to deliver more diverse housing.
- » It was consistently identified that there is a lack of understanding or evidence of how targets or measures are appropriately implemented and measured overtime within the regions identified.
- » There are limited examples of diversity targets being applied at a regional level but are increasingly being explored an implement globally due to their benefits.

Typology Classification

ShapingSEQ 2023 dwelling typology is derived from the standard ABS building type classification. This classification provides a comprehensive representation of housing types (with associated building heights), and a common basis for ongoing monitoring and evaluation.

Providing a more granular breakdown of MULTI output attached dwelling types creates a better understanding of the composition of dwelling supply. This involved the below categorisation rules to classify attached dwellings into three classes (attached – low rise, attached – medium rise, and attached – high rise). The typology classification is not part of MULTI itself. It is a classification workflow processed outside of the MULTI system.

The table below provides a description of each dwelling classification for ShapingSEQ 2023 and concordance to the ABS building type.

Table 16 - ABS building type to ShapingSEQ dwelling typology concordance and ShapingSEQ 2023

Building Type from ABS	Land Supply and Development Monitoring Report 2021	ShapingSEQ 2023 Categories
Houses	House	Detached
Semi-detached, row or terrace houses, townhouses - One storey	Middle	Attached – Low
Semi-detached, row or terrace houses, townhouses - Two or more storeys	Middle	
Apartments - In a one or two storey block	Middle	

Apartments - In a three storey block	Middle	
Apartments - In a four to eight storey block	High-rise	Attached – Medium
Apartments - In a nine or more storey block	High-rise	Attached – High

Housing type data used may not fully align to use definitions in planning schemes. For example, some dual occupancy, auxiliary units and secondary dwellings may be classified by the ABS as Houses. This may impact on the reporting of detached and low-rise - attached housing types compared to the closest equivalent planning scheme classification.

Treatment of housing types may differ across the region. Local governments may categorise medium and high-rise housing types differently, however, the above provides the most practical breakdown based on data availability and product considered within the attached categories.

Monitoring this breakdown of typologies will encourage a better balance between greenfield and infill development.

Methodology overview

The dwelling diversity targets are derived from dwelling supply projections produced by the MULTI for ShapingSEQ 2023, with the calculations occurring outside of the MULTI framework.

In determining dwelling diversity targets the following principles were utilised in preparation of method and identification of typology classifications.

> » Data driven – drawn from known and robust data sets.

> » Rule based – utilises a method and rules which are uniformly and consistently applied.

> » Regionally consistent – applicable uniformly across SEQ.

> » Verifiable – method and classification that is verifiable with observed data sets (Census).

> » Policy aligned – typology method applied to dwelling supply targets at 2046 and presented at LGA level.

The diversity is expressed as a percentage split between detached, low-rise, mid-rise and high-rise attached dwellings. The calculation of housing diversity utilises a data-driven methodology involving three datasets:

1. MULTI for ShapingSEQ Projections: detached and attached dwelling projections at 2021 and 2046, at SA2 level.

2. ABS 2021 Census data: Dwellings by type at SA2 level.

3. QLUAD: Parcel-based data as of June 2021.

The methodology involved grouping the ABS Census 2021 data into attached – low-rise, attached – medium-rise and attached – high-rise by SA2 following the concordance. A ruleset was applied based on dwelling density as the key parameter for classifying dwelling types, with density ranked at the SA2 level to represent the dwelling typology. The Census 2021 dwelling type data was used for control and validation of the 2021 percentage identified. The ruleset was applied to the 2046 attached dwelling projections at the parcel level. The 2046 targets are determined from ultimate capacity provided by Council planning assumptions, mainly derived from planning scheme zones and the ShapingSEQ policy interventions.

Monitoring

As previously mentioned, local governments are required to review and amend their planning scheme to meet the dwelling supply and diversity targets. Priority Action 1 of ShapingSEQ 2023 identifies that where aligning with the policy directions of ShapingSEQ 2023, local governments will have the opportunity to undertake a fast-tracked planning scheme amendment process for the purpose of implementing the plan.

The regional plan includes dwelling supply targets at 2046 and dwelling growth percentages that allows the department to assess the dwelling diversity within the existing stock but also to monitor the progress of regional plan diversity policy implementation by tracking the diversity of new dwellings. This typology breakdown for these

targets seeks to provide more accurate representation of different products, including gentle density (low-medium) products, for future monitoring.

The new dwelling growth by diversity type will be determined by measuring the year on year the percentage of ABS Building Approvals by type against the targets outlined in ShapingSEQ 2023.

The shift to more attached housing is necessary to enable greater housing diversity across SEQ to improve choice and affordability. ShapingSEQ 2023 seeks to drive greater change in the efficient and successful delivery of attached products by working with local governments and industry to unblock barriers to provide greater certainty in the market. While the intent of dwelling diversity targets is to encourage more diverse housing stock, it is acknowledged that the targets and figures are considered a minimum requirement and have been calculated using region wide modelling and data that have limitations when applied at a local government level context which include, but are not limited to, growth rates and classification of dwelling types.

Ipswich City Council and Logan City Council have nominated local government policy objectives against the diversity targets. These local diversity targets will need to be considered by local governments, state government and industry in the delivery of housing and policy to achieve higher diversity (attached – low, medium and high rise) for short, medium and long-term need.

Gentle Density

Gentle density is an emerging term used to describe a type of urban development that emphasises compact, walkable and transit-oriented development that integrates seamlessly into existing neighbourhoods.

The emergence of the concept of "gentle density" has been seen across Australia, with New South Wales, Queensland and Victoria incorporating this notion into the plan making policy. A number of jurisdictions have sought to involve the concept including "density done well" by the Victorian State Government in their 20-Minute Neighbourhoods policy[44] or "the recent planning reforms announced by the New South Wales government allowing more low rise and mid-rise housing in key locations.[45] This trend of more compact city policies aims to address social, economic and environmental issues through denser living.

Research indicates that setting urban density targets and measures can be away to guide outcomes but, it's not a one size fits all and targets don't guarantee positive outcomes for the regional plan. A systems-based approach has been applied to the updates which include "gentle density" that is explicitly defined and intended to support other targeted policy within the plan.

ShapingSEQ 2023 provides clear guidance on the concept of gentle density product that could enable subsequent streamlining of certain planning scheme requirements such as lowering levels of assessment for gentle density in certain zones to unlock the needed infill/consolidation growth across the region.

To support the housing diversity targets set through the regional plan, ShapingSEQ 2023 includes additional policy narrative around gentle density, as an update to the previous "missing middle" narrative.

The modelling inputs to support this policy and to predict increases in gentle density product has involved adding uplift in low density zoning across the region as part of the preferred growth pattern.

Facilitating diverse housing across the region

A key outcome of ShapingSEQ 2023 is shifting the focus towards consolidation and infill development across the region. This focus on achieving more compact urban areas is largely achieved through the provision of high-rise development in central/inner urban areas, where accessibility levels are usually highest. However, there is also a growing need to increase densities through both low-rise and medium-rise development in established inner/middle ring suburbs, with consideration of the dwelling diversity target concordance.

Outcome 3 of the regional plan includes a number of strategies that seek to promote greater housing diversity through the following:

» Facilitate increased gentle density across SEQ in consolidation and expansion areas (such as free-standing small lots or freehold title terrace-style development).

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[44] The State of Victoria Department of Environment, Land, Water and Planning (2020). Plan Melbourne 2017 – 2050. Retrieved from: https://www.planning.vic.gov.au/guides-and-resources/strategies-and-initiatives/20-minute-neighbourhoods

[45] New South Wales Department of Planning and Environment (2023). Diverse and well-located homes - Explanation of Intended Effect: Changes to create low-and mid-rise housing. Retrieved from: https://www.planning.nsw.gov.au/policy-and-legislation/housing/diverse-and-well-located-homes

- » Facilitate the delivery of attached high-rise development in Principal Regional Activity Centres (PRACs).
- » Facilitate the achievement of attached medium-rise development in walkable catchments along high frequency public transport networks.

A lack of housing diversity and choice is considered a major barrier to meeting the aspirations of people across key life stages, age cohorts and income groups. As identified by an enquiry undertaken by AHURI, the biggest gap in aspirations relate to home ownership. In 2020, more than 50% of young households currently not in home ownership aspired to be, compared to 15% of older Australians. All age groups desired to move out of their private rental more than wanting to remain in it, and this was the same for those living in social housing. This presents a clear demand for home ownership and a lack of diversity in the housing stock. One of the key challenges is providing more opportunities for inner city living that is accessible for a range of incomes, particularly in the form of low-rise and detached product.[46]

The above policies as outlined under Outcome 3 seek to address these challenges by encouraging diverse housing options to meet housing aspirations across the region. The inclusion of these strategies encourages responsive housing both in plan-making and also assists with the provision of housing through the development application process by encouraging diverse product in the right locations.

Housing Models and Forms

SEQ has an opportunity to facilitate innovative housing models and forms so more people can access more secure, affordable and sustainable homes. The following tables provide examples of housing models and forms that are sought under Outcome 3 (Strategy 3.5) of ShapingSEQ 2023.

Table 17 - Housing Models and Forms to support ShapingSEQ 2023

Housing model	Description
Build to Rent	Build to Rent (BTR) developments are typically large-scale, purpose-built rental housing that is owned under a unified ownership structure and managed by a single management entity. They are usually residential properties specifically designed, built and managed for long term rental, and typically include a high-level of amenity for the benefit of tenants as well as other characteristics, such as more flexible lease arrangements.
	These developments generate long-term rental income for landowners, rather than up-front sales or capital growth, targeting the growing renter market seeking secure, long-term rentals.
	This identified growth sector will further enable high quality, purpose designed and built rental stock to be brought to market, creating additional housing choice with greater security and service.
	The Build to Rent model provides an opportunity for government to work with the private sector to deliver more affordable rental dwellings at discounted rents, such as through the Build to Rent Pilot projects and financial concessions.
Co-housing developments	Co-housing developments are typically more affordable and led by a community of people who design and finance the development. Facilities are shared within the co-housing community so that individual units offer greater amenity than in a commercial property development. By removing the profit margin and by sharing resources, co-housing produces good quality housing at a more affordable price than commercial developments. Co-housing is designed, built and lived in by people who plan to be long-term residents. A sense of community responsibility, both between the residents and to neighbouring property owners, is core to the project.

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[46] Stone, W., Rowley, S., Parkinson, S., James, A. and Spinney, A. (2020) The housing aspirations of Australians across the life-course: closing the 'housing aspirations gap', AHURI Final Report No. 337, Australian Housing and Urban Research Institute Limited, Melbourne, https://www.ahuri.edu.au/research/final-reports/337, doi: 10.18408/ahuri-5117001.

	Co-housing is typically located close to the central city, a local centre and/or transport links that make living without a car possible.
Land Lease / Ground Lease	Land or Ground Lease Models are partnership approaches where land owners lease the land to organisations and often to not-for-profit groups to finance, design and construct new housing. The lessee will often manage and maintain the housing, before handing the land and all dwellings back to the land owner. This is often proven successful where government land is leased to not-for-profit organisations for social housing and affordable housing.
Housing First Model	The Housing First approach advocates that people experiencing homelessness should be moved quickly into permanent housing before other issues, such as substance abuse or mental health issues, are addressed. It is based on the idea that stable housing is required before people can address other issues in their lives. The Housing First Model is supported by an international evidence base.
Key Worker Housing	A model that provides support for purpose-built, professionally managed rental housing stock that provides homes for key workers close to essential jobs. These models allow for secure and affordable housing over the long term for key workers and are facilitated through community land trusts or other mechanisms. Key workers are those that contribute significantly to the performance of regions. New policies and programs usually commence with select groups of key worker occupations before expanding over time on the basis of household income.
Ageing in place	Ageing in place can come in many innovative forms to allow older people to remain at home by choice. This will often involve the co-location of health and specialist uses close to dwellings to support the needs of older people and provide suitable housing options to better meet the needs of social housing and affordable housing tenants as they age.
	Retirement communities are one example of geographically defined communities formed for older people. Co-housing or land lease can also be a successful method to support ageing in place.
	As cities experience demographic shifts, the need for age-friendly design is even more important. Future housing and environment need should be shaped for, and should include the elderly.
Specialist Disability Accommodation and Independent Housing Models	There are a number of organisations and providers that deliver and/or manage independent supported living arrangement with funding from the National Disability Insurance Scheme. New disability housing options in Australia are moving towards co-location opportunities, such as apartments in mainstream developments, to further support independent living and social integration.
	Independent housing models ensures that everyone is entitled to a safe and inclusive place to live and allows people to receive the services they need in more places.
Micro housing	Micro-housing includes dwellings that are relatively smaller than standard dwelling sizes.
	These dwellings usually consist of one room (combining living room, bedroom, and kitchen), with a separate area for a bathroom. Utilities are often communal throughout the building.
	This type of housing allows for the use of under-utilised resources, such as existing streets and infrastructure to deliver higher density, affordable living opportunities in desirable places close to infrastructure and high amenity areas.
Prefabricated housing e.g., tiny houses	A term for the method used to manufacture and construct homes off-site usually in standard sections that can be easily shipped and assembled as needed.

	This housing can include modular homes that are created in sections, and then transported to the home site for construction and installation.
	Prefabricated homes provide an innovative approach to support the increased provision of housing supply.

Community Awareness of Housing Diversity

A positive shift in community sentiment in favour of housing diversity will support the delivery of housing commitments and provide relief to those seeking homes sooner. A key action from the Queensland Housing Summit in October 2022, was for the government to partner with local governments and industry to create a community engagement and awareness campaign covering growth and housing diversity with an allocation of $5 million.

The Growth and Housing Diversity advertising campaign supported the consultation phase as well as the launch of ShapingSEQ 2023. The campaign has been developed based on a series of significant research pieces that have been conducted in deep consultation with members of the Growth Areas Advisory Committee. The campaign's development has also drawn from engagement activities that many local governments have participated in over the last couple of years in working with the Queensland Government.

The advertising has been seen across Queensland on free-to-air TV, in cinema, in print, on outdoor billboards, on the radio, online and on social media. Strategy 3.6 in ShapingSEQ 2023 seeks to continue this work and other educational and awareness activity across the region to increase awareness of the benefits of growth and improving sentiment towards housing diversity. This includes working with industry, local government and communities to improve their understanding of the need for growth and housing diversity. A dedicated website has also been developed as a space to educate the community with longer form education pieces to be rolled out in support of the intent of ShapingSEQ.

Outcome 4: Social and Affordable Housing

Housing affordability is continuing to worsen in recent decades as the prices of houses and apartments have risen faster than average household incomes, with higher purchase prices flowing through to the cost of renting. This is particularly evident in the SEQ region where significant growth is continuing to occur. The tightening of the affordable housing market has pushed many people on low and moderate incomes into housing stress. The supply of new social housing has also continued to decrease over the last few decades in comparison to its identified need and demand overtime. This has created a shortfall in social housing stock. This lack of suitable social housing is leading to increased rental stress and increased social housing waitlists and homelessness across the region. The Housing and Homelessness Action Plan 2021-2025 (HHAP) was released in June 2021 and outlines several commitments across government to address housing supply and affordability and to drive the delivery of more social housing and affordable housing for low to moderate income Queenslanders. The HHAP established the Queensland Housing Investment Growth Initiative (QHIGI), which is a coordinated capital program delivering new social homes across Queensland.

Investment of $2.9 billion was originally committed under the HHAP, including the establishment of the $1 billion Housing Investment Fund (HIF). On 20 October 2022, coinciding with the Queensland Housing Summit, the Queensland Government increased the HIF to $2 billion to generate investment returns to support 5,600 social and affordable home commencements across Queensland by 30 June 2027.

The 2023–24 Budget announced increased funding of $1.1 billion over 5 years for the delivery and supply of social housing across Queensland through the HHAP. This was to meet higher construction costs and boost the QuickStarts Queensland program target by 500 homes to a target of 3,265 social housing commencements by 30 June 2025.

The Australian Government has announced a suite of initiatives in response to the current housing challenges including the 2022 National Housing Accord which aligns all levels of government, investors and the construction industry to build one million new, well-located homes over five years from 2024. ShapingSEQ 2023 is a part of the Queensland Government's response to the National Housing Accord and National Planning Reform Blueprint.

ShapingSEQ 2023 seeks to encourage both social and affordable housing opportunities though setting a target that can be monitored over the life of the plan. The other policies outlined within the regional plan will also assist as additional planning mechanisms that are intended to create more affordable housing across the region.

Delivery of new and sustainable social housing requires strong partnerships with the community housing sector, industry bodies, local government and the private sector. The Queensland Government continues to work closely with these partners to meet the needs of our communities today and into the future.

Homes for Queenslanders – Queensland Housing Plan

The Queensland Government is committed to increasing its investment in social housing to ensure it is available to provide housing stability to vulnerable people who are not able to access and sustain housing. In February 2024, the Queensland Government released the *Queensland Housing Plan – Homes for Queenslanders* which includes a target of 53,500 new social homes by 2046. This target is informed by modelling being undertaken by the AHURI on the unmet need for social housing. Homes for Queenslanders includes a range of initiatives to address housing needs. Key actions include exploring options to deliver more social housing and affordable housing and ensuring there are diverse housing options available to people on low incomes. In addition to the target, these relevant actions include:

» Working towards a Ground Lease Model pilot to unlock more social and affordable housing on surplus government land.

» Establishing and delivering an Inclusionary Planning Pilot Program to help developers, the community and councils understand how different inclusionary planning models can work in practice.

» Establishing a new State Facilitated Development Unit to streamline development that is a priority for the state and has a dedicated social and affordable housing component in underutilised urban areas.

» Using QuickStarts Queensland, the Housing Investment Fund, and the Social Housing Accelerator and Housing Australia Future Fund to provide more opportunities for social and affordable housing.

» Supporting sector capacity and capability through Community Housing Futures, with community housing providers able to seek up to $50,000 in Business Advisory Grants for tailored professional advice and assistance.

» 1,200 social homes for First Nations communities.

ShapingSEQ 2023 was prepared alongside, and directly aligns with, Homes for Queenslanders.

ShapingSEQ 2023 Social and Affordable Housing Target

ShapingSEQ 2023 seeks to drive government, the private sector and community housing providers to bring forward greater volumes of social and affordable housing through targets. Affordable housing targets alongside strategies to support partnerships with development industry and financial providers, as well as repurposing underutilised spaces are included in the plan. This will enable SEQ to contribute to the delivery of the Homes for Queensland target for 53,500 new social homes across Queensland by 2046.

The regional plan provides a place-based approach with the inclusion of a target of 20% for new homes in SEQ being either social housing (including public and community housing) or affordable housing (households on low to moderate incomes). The social and affordable housing target has been based on benchmarking a suite of best practice examples, recently implemented from a national and state level.

This combined target is applied at a region-wide scale for SEQ. As per ShapingSEQ 2023 (page 220), the social housing and affordable housing target is not intended to be implemented in an ad-hoc way through assessment of individual development applications.

As defined in ShapingSEQ 2023, the housing system is comprised of a variety of dwelling types, tenures and ownership structures.

ShapingSEQ 2023 provides further description of the range of social and affordable housing types that are included in the target:

Non-market housing: Non-market housing refers to subsidised housing that is sold or rented at less than its market value.

Non-market housing (such as social housing) provides for individuals and households who do not have the opportunity to access and sustain appropriate housing options in their community. Social housing is directly managed by the state government or community housing providers (CHPs).

Market-affordable housing: Market-affordable housing refers to a range of market-driven delivery models that create more affordable product but do not necessarily rely on a government subsidy. These models can include, but are not limited to, the following examples:

- » Not-for-profit developments that use internal revenue and cross subsidy schemes to maintain discounted sale or rental prices to provide some affordable housing for a proportion of a broader development.

- » Affordable by design housing that is sold or rented at its market value and is affordable for low to moderate-income households within a defined area on the basis of its type, composition, method of construction, size or level of finish.

Other market housing: Other market housing refers to housing that is sold or rented at its market value but does not meet the affordability criteria for low to moderate-income households. A sufficient supply of other market housing assists with broader housing affordability by placing downward pressure on rising property prices and alleviating stress on the overall housing system.

People on low and moderate incomes – including a growing cohort of childcare workers, health workers and service industry staff – are critical to the broader prosperity and diversity of an area. Continuing to evolve our housing models and create more diversity in the market through innovations in non-market, market-affordable and other market housing will be critical as we grow. This means that there are a range of homes both for rent and for purchase at a price point that is affordable to people on low and moderate incomes.

Affordability is not a one size fits all approach. Increasing building costs are widely acknowledged as posing severe challenges to the provision of affordable housing. Building costs are not only influenced by the configuration, shape, and height of a building, but also the ability to provide flexibility and adaptability of spaces for different uses and diversity of residents' needs. Affordability must also consider key factors such environmental sustainability and community building as part of the delivery of more affordable housing.

Increasing the amount of social housing and affordable housing across the SEQ region is a key to improving housing diversity across the region. ShapingSEQ 2023 has an important role to play in driving joint accountability at all levels of government and industry through the articulation of the 20% target, coupled with the Queensland Government's substantial investment in social housing and affordable housing.

Outcome 5: Growing rural towns and villages

Rural towns and villages are an important part of the SEQ growth pattern and offer a lifestyle choice for many residents that often relies on surrounding scenic and environmental values. The rural towns and rural residential areas located relatively close to the major urban areas experience growth pressures and demographic changes similar to those urban areas. More distant rural towns will grow in accordance with local and subregional needs. Population projections indicate steady and proportionate growth in all the rural local government areas. However, because each rural town and village has a particular character, growth needs to be managed carefully.

ShapingSEQ continues to recognise rural residential areas, some of which are inside the Urban Footprint, as areas that facilitate housing choice. These areas are characterised by comparatively large lots and single detached dwellings. Where within the Urban Footprint they are considered urban areas and are not regulated by the SEQ regulatory provisions of the Planning Regulation 2017. As a result, the assessment of any subdivision in such an area is largely a matter for local government.

Outcome 5 of ShapingSEQ 2023 supports sensitive growth of rural areas outside of the Urban Footprint where it is cognisant to the character of the area and does not fragment agricultural land or biodiversity networks. ShapingSEQ 2023 maintains similar provisions from the 2017 plan whereby including provisions that allow local governments to investigate the future viability of rural towns and villages to determine whether there are limitations to their ongoing resilience or ability to respond to change. This includes local governments utilising the Township Zone where demonstrable economic or social need is identified for a town or village.

Rural Workers Accommodation

The current housing pressures are likely to result in a significant number of workers having to live further away from where their jobs are located. This may lead to longer average commutes, further exacerbating stress and fatigue already felt in these industries.

The Queensland Government is aware of the shortage and price of accommodation in rural and regional areas and understand the importance of providing convenient and affordable housing options is not just about rural workers being close to work but also providing services and appropriate accommodation that keep and attract rural workers in our communities.

To assist with supporting an accommodation solution for rural workers and relieving pressure on the existing housing stock, the Queensland Government has developed the Queensland Rural Workers' Accommodation Initiative. This interim policy response is implemented under the *Planning Act 2016* through the Planning Regulation 2017 and currently will be in effect until 9 December 2025.

The Initiative supports repurposing existing underutilised facilities as an interim solution for rural workers' accommodation, where on premises nominated by the Planning Minister and used for accommodating employees for the Initiative. The Initiative and associated amendments to the planning framework also allow for small scale rural workers' accommodation to proceed without a material change of use development approval, when meeting certain criteria.

ShapingSEQ 2023 recognises the need for housing for everyone, including rural workers. This has prompted the inclusion of a strategy under the Grow theme to support rural workers accommodation in alignment with the Queensland Rural Workers' Accommodation Initiative.

Implementation

ShapingSEQ 2023 creates the settings for the delivery of almost 900,000 new homes needed in the region by 2046 to accommodate 2.2 million new residents. This is almost 70,000 more homes than the 2017 plan unlocked, or an extra 2,500 homes per year to meet the increased demand.

The government is committed to making sure that planning uncertainty or process is not one of the reasons holding up the creation of these new homes across Queensland. ShapingSEQ 2023 is underpinned by an implementation framework to consistently engage with local governments, industry and the community to accelerate delivery of more housing.

Further information relating to the implementation of ShapingSEQ 2023 is provided in the Implementation Assurance Framework Background Paper.

Priority Actions

ShapingSEQ 2023 outlines two Priority Actions for the Grow theme being the 'streamlined ShapingSEQ alignment planning scheme amendment' (Priority Action 1) and 'High Amenity Areas' (Priority Action 2). The delivery of the Grow theme will also be supported by a suite of proposed legislative changes.

Priority Action 1: Streamlined ShapingSEQ 2023 alignment planning scheme amendments

A key outcome sought by ShapingSEQ 2023 is implementation assurance. It is acknowledged that following ShapingSEQ 2017, integration of key policies in local government planning schemes were either significantly delayed or did not occur. Implementation through planning scheme alignment with ShapingSEQ 2023 will provide LGAs the opportunity for a place-based response to how they will ensure housing density and diversity is achieved for their communities.

Priority Action 1 – Streamlined ShapingSEQ 2023 alignment planning scheme amendments	
Stakeholders: State and local governments	*2024 – 2025*
The Queensland Government will facilitate streamlined (3, 6 and 12-month) planning scheme amendment processes for local governments to undertake where policy requires recalibration with the outcomes sought by ShapingSEQ 2023. The streamlined processes will be available to local governments where	

proposed planning scheme amendments align with and advance the outcomes and strategies of the ShapingSEQ 2023 Grow theme.

Priority Action 1 of ShapingSEQ 2023 identifies that, where aligning with the policy directions of ShapingSEQ 2023, local governments will have the opportunity to undertake a fast-tracked planning scheme amendment process for the purpose of implementing the plan. As detailed in ShapingSEQ 2023, the Queensland Government will facilitate the streamlined planning scheme amendment processes for local governments to undertake throughout 2024 on a 3, 6 and 12-month basis.

This includes alignment activities relating to supporting gentle density, housing diversity targets and other relevant strategies within the Grow theme.

Priority Action 2: High Amenity Areas

ShapingSEQ 2023 identifies a High Amenity Areas framework as a multi-functional approach to amenity, applied across the region to promote additional growth in the right locations. It will also support decisions about which areas can support further density and diverse housing choices.

Priority Action 2 – High amenity areas	
Stakeholders: State and local governments, utility providers	*2024*
The Queensland Government will refine the multi-criteria analysis tool from the framework in partnership with local governments and state agencies. The Queensland Government will work in collaboration with local governments and utility providers to identify and spatially define high amenity areas and prioritise greater housing densities and diversity in these locations. The high amenity areas framework will continue to inform localised policy interventions, plan-making and development assessment processes.	

This priority action involves collaboration on relevant locational criteria, appropriate weighting, and spatially identifying high amenity areas in partnership with local governments considering local context and future policy aspirations. The Priority Action will also utilise modelling and evidence from the outputs and/or criteria to understand additional policy interventions informing plan-making and development assessment processes.

The Queensland Government will refine the multi-criteria analysis tool from the framework in partnership with local governments and state agencies. This includes working with local governments to identify and spatially define high amenity areas and prioritise greater housing densities and diversity in these locations.

The State Government will work with local governments to prioritise higher densities in high amenity areas in the short, medium and longer terms.

The high amenity areas framework is one tool for identifying where dwelling supply and greater density and diversity is to be planned and delivered across the region. It is also a tool for identifying areas that need support in converting planned dwelling supply to actual growth on the ground.

The high amenity areas framework also aligns to other strategies sought through the regional plan, including achieving a more consolidated urban form. Higher areas of amenity seek to maximise access to existing and future planned infrastructure and services to provide more homes for people in places and supporting affordability.

The implementation of ShapingSEQ 2023 will continue to be monitored, with a suite of measures and performance indicators to demonstrate progress and if targets have been met. Aligned to the Grow theme, the annual LSDM report will monitor the dwelling supply targets and dwelling diversity sub-targets for each LGA, as well as the minimum density requirements across the region.

The updated implementation assurance framework will ensure policy directions can be delivered with sufficient transparency, accountability, and resources – providing greater clarity and certainty to stakeholders. Going forward, the plan will be updated every two years, so we will be working with our stakeholders to respond to new opportunities and challenges as they arise.

Alignment with the UN SDGs

ShapingSEQ 2023 provides an opportunity to strengthen the government's commitment to contributing towards the United Nations Sustainable Development Goals (UN SDGs). These goals provide a blueprint of how we can

achieve a better and more sustainable future, with a view of achieving the goals by 2030. Key policy decisions in ShapingSEQ 2023 promote alignment to (but is not limited to) the following UN SDG goals in relation to the Grow theme. As such, the Grow theme consists of five outcomes which promote sustainably accommodating a growing population, aligning to a number of the UN SDGs.

Goal 3 - ensuring healthy lives and promoting well-being for all at all ages.

ShapingSEQ 2023, and outcomes of the Grow theme, supports a consolidated urban growth pattern in well located areas, ensuring the community has access to adequate services and amenity with the purpose of increasing the quality and wellbeing of residents. ShapingSEQ 2023 aims to respond to community needs and lifestyles, providing housing supply and choice for residents, as well as social and affordable housing. The introduction of social and affordable housing targets will assist in reducing homelessness, provide safe and secure access to housing and potential wellbeing impacts for displaced community members. Community values and identity is an important aspect of ShapingSEQ 2023, especially when growing rural towns and villages and establishing residential areas.

Goal 8 – promoting sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

ShapingSEQ 2023 promotes a consolidated urban growth pattern that ensures the region has access to a variety of employment opportunities, increasing the sustained economic growth of the region. ShapingSEQ 2023 aims to support sustainable economic growth, access to jobs and employment opportunities by increasing housing supply and improving housing choice and diversity throughout the region. Economic growth and inclusive employment opportunities is also supported through the provision of increased of social and affordable housing. Through ShapingSEQ 2023, policies relating to growing rural towns and villages is a means of maintaining and increasing rural worker's residency in the area and sustaining local economies.

Goal 11 – making cities and human settlements inclusive, safe, resilient and sustainable

The Urban Footprint identified in ShapingSEQ 2023 promotes well located places with access to employment, services and amenity. To support this, providing housing choice and diversity, as well as social and affordable housing, delivers a desirable urban settlement inclusive of a range of community needs and promotes safe and inclusive access to housing through a place-based approach.

Goal 13 – taking urgent action to combat climate change and its impacts

The Grow theme supports climate change action through promoting high density residential areas through housing diversity and density in key locations of high amenity and accessibility, resulting in less greenhouse emissions and other impacts derived from urban sprawl trends. The regional plan also supports sustainable growth in rural areas without adversely increasing urban sprawl growth pattern.

By leveraging the UN SDGs, the region has more opportunities for investment and action at regional and local levels.

Further information

To download a copy of ShapingSEQ 2023, or to access further information, go to the department's website at www.qld.gov.au/shapingseq

The website includes a range of supporting materials including:

- » A summary of the plan
- » Interactive mapping
- » PDF maps
- » ShapingSEQ 2023 Consultation Report
- » Indicator Dictionary.

Appendix A – Existing Urban Area (EUA)

The following explains the evolution of the EUA since the first statutory regional plan.

South East Queensland Regional Plan 2005–2026

The EUA was originally identified to support the South East Queensland Regional Plan 2005–2026 (SEQRP 2005) and reflected the existing urbanised areas of the region. It was primarily parcel-based, using the cadastre as at 2005 and the then current local government planning scheme zonings (e.g. residential, industrial, commercial and business zones). Local government officer advice resulted in some generalisations of the boundary to reflect local perspectives on infill.

This boundary was developed to assist in monitoring the infill and redevelopment additional dwelling targets as set in the SEQRP 2005, through the now defunct Urban Development Monitoring Program, which existed between 2006 and 2007. For this monitoring program additional dwelling approvals were sourced through unpublished local government approval databases and ABS dwelling unit records.

South East Queensland Regional Plan 2009–2031

As part of the SEQRP review in 2008/09, the EUA was also reviewed. This review analysed the use of the detailed boundary identified for the SEQRP 2005 and formulated a new boundary to:

- reduce the work load of collecting and geocoding council and ABS dwelling approval information
- take advantage of consistent dwelling approval information available from the ABS
- resolve inconsistencies between LGAs in the definition of the EUA.

This new boundary, based on 2006 Census Collection Districts (CCDs), was derived in consultation with the region's local governments and sought to include areas which were predominantly urban as at December 2008. The boundary was used to enable more efficient direct comparisons between infill targets and ABS building approvals data. A range of data sources were used to determine whether a CCD was included within the EUA, based on a consistent set of decision rules applied across the region. The data inputs included:

- the digital cadastral database
- local government planning schemes
- the draft SEQRP land use category boundaries
- spatial representation of existing sewerage infrastructure
- UBD raster images
- aerial and satellite imagery.

ShapingSEQ

As part of preparing ShapingSEQ 2023, the EUA was also reviewed.

Since 2009, the ABS has changed its building approval reporting from CCD level to SA2 level. The review has attempted to match the 2009 CCD-based EUA boundary as closely as practicable with a new SA2-based boundary. However, there are locations where the two are out of alignment, both excluding areas that were in the 2009 boundary and including areas that were not in that boundary. At the overall regional level, the new SA2-based boundary of ShapingSEQ is a reasonable approximation of the 2009 CCD-based boundary.

ShapingSEQ 2023

The EUA of ShapingSEQ 2017 comprises of ABS 2016 Statistical Area 2s (SA2s). For Census 2021, changes were made to the Australian Statistical Geography Standard (ASGS), and Statistical Areas Level 2 (SA2s) mainly to reflect population growth, largely on the edge of urban areas.

Given changes in SA2 boundaries, population and urban growth, a revision of the EUA boundary has become necessary.

The updated EUA boundary comprises of SA2s that have been 'dissolved' to define a single area and boundary outline for spatial accounting and monitoring purposes.