Urban Development Program

2009

Regional Residential Report

City of Ballarat

State Government Victoria

Department of Planning and Community Development

If you would like to receive this publication in an accessible format, such as print, please telephone the Project Manager on 9637 9605, or email urbandevelopment.program@dpcd.vic.gov.au

This publication is also published in PDF and Word formats on www.dpcd.vic.gov.au

Published by the Victorian Government Department of Planning and Community Development, Melbourne, October 2010.

Authorised by Justin Madden, 8 Nicholson Street, East Melbourne Vic 3002.

ISSN 1834-3988

For more information visit http://www.dpcd.vic.gov.au/planning/

Urban Development Program

2009

Regional Residential Report

City of Ballarat

Contents

MINISTERS MESSAGE 1

EXECUTIVE SUMMARY 3

1.0 INTRODUCTION 5
- 1.1 Purpose and Context 5
- 1.2 Regional Context 5
- 1.3 2009 Urban Development Program Reports 5

2.0 APPROACH & METHODOLOGY 7

3.0 RECENT ACTIVITY 11
- 3.1 Residential Building Approvals 11
- 3.2 Residential Lot Construction 12
  - 3.2.1 Minor Infill Lot Construction 13
  - 3.2.2 Major Infill Lot Construction 13
  - 3.2.3 Broadhectare Lot Construction 13
  - 3.2.4 Low Density Lot Construction 14
- 3.3 Residential land and House Prices 14

4.0 RESIDENTIAL LAND SUPPLY 17
- 4.1 Vacant lots 19
- 4.2 Minor Infill Supply 20
- 4.3 Major Infill Supply 20
- 4.4 Broadhectare Supply 21
- 4.5 Future Residential Land Supply 21
- 4.6 Low Density Supply 22
- 4.7 Low Density Overview Maps 24

5.0 PROJECTED DEMAND 25

6.0 ADEQUACY OF LAND STOCKS 27

7.0 RESIDENTIAL MAPS 29

8.0 RESIDENTIAL TABLES 35

GLOSSARY OF TERMS 51

ACKNOWLEDGEMENTS 53

LIST OF TABLES

Table 3.1: Median Sales Price for Vacant Residential Allotments by Supply Type 15

Table 3.2: Median Sales Price for Separate Houses by Supply Type 15

Table 4.1: Residential Lot Potential by Supply Type, 2009 18

Table 4.2: Anticipated Lot Construction Activity – Major Infill, 2009 20

Table 4.3: Anticipated Lot Construction Activity – Broadhectare, 2009 21

Table 6.1: Estimated Years of Residential Land Supply 27

Table 8.1: Minor Infill Lot Construction, 2005/0 6 to 2008/09 36

Table 8.2: Major Infill Lot Construction, 2005/06 to 2008/09 37

Table 8.3: Broadhectare Lot Construction, 2005/06 to 2008/09 38

Table 8.4: Low Density Lot Construction, 2005/06 to 2008/09 39

Table 8.5: Minor Infill Lot Potential, 2009 40

Table 8.6: Major Infill Lot Potential and Anticipated Development Timing, 2009 41

Table 8.7: Broadhectare Lot Potential and Anticipated Development Timing, 2009 42

Table 8.8: Future Residential Land Supply (lots), 2009 43

Table 8.9: Residential Vacant Lot Stock by Zone Type, 2009 44

Table 8.10: Occupied and Vacant 'Low Density' Lot Stock, 2009 45

Table 8.11(a): Estimated and Projected Number of Households, 2006 to 2026 46

Table 8.11(b): Estimated and Projected Average Annual Change in the Number of Households, 2006 to 2026 46

Table 8.11(c): Estimated and Projected Average Annual Percentage Change in the Number of Households, 2006 to 2026 46

Table 8.12: List of Suburbs by SLA 48

LIST OF GRAPHS

Graph 3.1: Number of Residential Building Approvals, 2003/04 to 2008/09 12

Graph 3.2: Number of Residential Lots Constructed by Supply Type, 2005/06 to 2008/09 12

Graph 3.3: Average Annual Number of Broadhectare Lots Constructed by Suburb, 2005/06 to 2008/09 14

Graph 4.1: Stock of Vacant Residential Allotments, 2009 19

Graph 4.2: Stock of Vacant and Occupied 'Low Density' Allotments, 2009 22

Graph 5.1: Projected Demand for Residential Dwellings, 2006 - 2026 25

LIST OF LOW DENSITY OVERVIEW MAPS

Overview Map 1: Vacant and Occupied Low Density Allotments, 2009 24

Minister's message

I am pleased to launch the inaugural regional editions of the highly reputed Urban Development Program.

Established by the Victorian Government, the Urban Development Program is an initiative of the planning framework *Melbourne 2030*. The program aims to ensure there is sufficient residential and industrial land both in metropolitan Melbourne and regional Victoria to meet population growth, ensure a competitive land market and reduce pressure on housing affordability.

In June 2010, the Victorian Government released *Ready for Tomorrow*, a Blueprint for Regional and Rural Victoria, which seeks to ensure that regional Victoria can continue to grow, remain prosperous and deliver investment and better liveability outcomes.

The Blueprint's long-term Regional Settlement Framework is for 'A State of Many Choices', which includes a settlement plan for regional Victoria that complements the *Melbourne @ 5 Million* policy, bringing together a comprehensive plan for the whole of the State.

This new approach helps to ensure that regional Victoria maintains its character, identity and sustainable way of life; that services and infrastructure keep pace with growth and economic development; and that growth is focused in places that have the capacity to accommodate and sustain higher populations. The Urban Development Program has been identified as a key component in assisting to deliver the outcomes of this approach across regional Victoria

One of the primary objectives of the Urban Development Program is to provide accurate and up-to-date information to assist the Victorian Government, local councils, infrastructure and service providers, and other major stakeholders in making informed decisions to help ensure an ongoing provision of land supply and supporting infrastructure for housing and employment requirements.

The Government is also speeding up the release of land in regional centres through place based projects. We are working with Councils to support planning for large scale growth in major regional areas such as the Ballarat West Growth Area and the Armstrong Creek Growth Area within Greater Geelong.

Additionally, the Regional Towns Development Program was introduced two years ago to help expedite the delivery of land for housing and employment across a number of these major areas. To date it has delivered Township Plans for Huntly and Strathfieldsaye within Bendigo, a Residential Infill Opportunities study for Ballarat, the Traralgon Inner South Masterplan in Latrobe City, and the Leneva Valley Design Guidelines in Wodonga.

With Victoria's regional population growing at its highest rate since 1982, it is important to carefully plan for this growth by providing liveable and sustainable communities with housing and employment.

The expansion of the Urban Development Program across regional Victoria will help ensure that regional cities can continue to grow and prosper for future generations.

JUSTIN MADDEN MLC
MINISTER FOR PLANNING

Executive summary

The 2009 Urban Development Program for Regional Victoria provides an analysis of supply and demand for residential and industrial land across parts of regional Victoria. Initially, this covers the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, but will cover other areas of regional Victoria in oncoming years. This component provides information on residential supply and demand for the municipality of Ballarat.

The following residential land supply assessment was undertaken by Spatial Economics Pty Ltd and commissioned by the Department of Planning and Community Development in conjunction with Regional Development Victoria and the Ballarat City Council.

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

Recent Activity

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Ballarat has averaged 787 dwellings per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent.

The vast majority of building approvals (93%) over the last three years from 2005/06 have been for separate houses, 6% for semi-detached dwellings and 1% for units/apartments.

From 2005/06 to 2008/09 there was an average annual residential lot construction of 756. The majority (54%) were broadhectare lots, 23% were Minor Infill, 18% Major Infill and 5% low density. Specifically:

- Broadhectare lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 410 lots per annum
- Minor infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 177 lots per annum;
- Major infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 134 lots per annum; and
- Low density lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 36 lots per annum

In 2005/06 the median sales value for a vacant residential allotment was $89,000 this increased to $95,000 in 2007/08 and remained at this value in 2008/09. From 2005/06 to 2008/09, the median sales value for a vacant residential allotment increased by 1.6% per annum.

As measured from 2005/06 to 2008/09, the median sales value for a separate house increased by 1.7% per annum, increasing from $212,000 to $227,000 across the entire municipal area.

Projected Demand

From 2011 to 2016, *Victoria in Future 2008* projections indicate that the average annual dwelling demand across the municipal area of Ballarat will be 819; from 2016 to 2021 – 834 per annum, declining to 784 per annum from 2021 to 2026.

Demand projections broadly align with recent residential lot construction and building approval activity. Similarly, demand projections broadly match anticipated lot construction over the next 5 years, highlighting that expected construction will meet short-term demand.

The Urban Development Program will continue to report on changes to projected demand levels within these areas, and incorporate updated *Victoria in Future 2008* population and household projections as they become available.

Identified Residential Land Supply

In total (excluding existing vacant residential lots) there is a residential lot supply of 31,785. This is comprised of:

- 4,706 zoned broadhectare lots (14% of supply);
- 3,594 minor infill lots (11% of supply);
- 1,017 major infill lots (3% of supply);
- 642 vacant low density residential lots (2% of supply); and
- 21,826 designated future residential lots (69% of supply).

As at July 2009 there was a total residential vacant lot stock of 1,359, of which 92% was zoned Residential 1 (R1Z). There were 83 lots zoned Mixed Use (MUZ) and 27 zoned Township (TZ).

Within the municipal area of Ballarat, there is an estimated lot potential within Future Residential areas of approximately 21,826. Of this lot potential, 83% is located within the Ballarat West Growth Area. (Note that land zoned Urban Growth Zone is incorporated into Future Residential land supply)

Years of Residential Land Supply

It is estimated, based on the identified supply and *Victoria in Future 2008* demand projections, there is **over 15 years** total supply of residential land stocks across the Ballarat municipality.

In terms of zoned residential land stocks, there are sufficient land stocks to satisfy **10 years** of future demand. This is based on a zoned lot potential of 9,300 lots, of which:

- 4,706 lots are broadhectare;
- 3,594 are minor infill; and
- 1,017 are major infill.

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

In addition the vacant residential lot stock of 1,359 lots also constitutes around **1.7 years** supply of vacant land.

Current Actions

Recent planning scheme amendments have resulted in land in the Ballarat West Growth Area being rezoned to an Urban Growth Zone, and will potentially accommodate an additional 14,000 to 20,000 households in this area. The 2009 Urban Development Program for the City of Ballarat reports a potential of 18,119 lots for the Ballarat West Growth Area.

On approval of precinct structure plans for Ballarat West, this will create an additional 20-25 years supply of residential land available for development within the Ballarat municipality.

In total the City of Ballarat has in excess of 15 years supply of residential land; consistent with Clause 11.02-1 of the State Planning Policy Framework which aims to ensure that sufficient land is available to meet forecast demand; and accommodate projected population growth over at least a 15 year period.

1.0 Introduction

1.1 Purpose and Context

The Urban Development Program has been one of the Victorian Government's major initiatives to support the strategic intent of its key planning document for metropolitan Melbourne, Melbourne 2030. The Urban Development Program was set up in 2003 to assist in managing the growth and development of metropolitan Melbourne and the Geelong region, and help ensure the continued sustainable growth of these areas in order to maintain their high levels of liveability.

The primary purpose of the Urban Development Program is to improve the management of urban growth by ensuring that government, councils, public utilities and the development industry have access to up-to-date and accurate information on residential and industrial land availability, development trends, new growth fronts, and their implications for planning and infrastructure investment.

The main purpose of the UDP is to provide accurate, consistent and updated intelligence on residential and industrial land supply, demand and consumption. This in turn assists decision-makers in:

- maintaining an adequate supply of residential and industrial land for future housing and employment purposes
- providing information to underpin strategic planning in urban centres
- linking land use with infrastructure and service planning and provision
- taking early action to address potential land supply shortfalls and infrastructure constraints
- contributing to the containment of public sector costs by the planned, coordinated provision of infrastructure to service the staged release of land for urban development.

The information contained and reported within the Urban Development Program enables early action to be taken in areas where land shortfalls have been identified.

1.2 Regional Context

During 2009, the Urban Development Program was expanded across key provincial areas across regional Victoria. Initially, this covers the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, but will be expanded to other key areas in oncoming years.

An expanded Urban Development Program into regional Victoria will build local and regional data bases and, importantly, provide a platform for mapping and spatial analysis in each region. This will in turn allow councils and other key players in the planning and development sectors to make more informed decisions in the growth and investment of these key areas across regional Victoria.

The residential land supply assessments for the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development in conjunction with Regional Development Victoria and the City Councils of Ballarat, Greater Bendigo, Latrobe and Wodonga.

These areas form the initial expansion of the Urban Development Program across regional Victoria. Other areas will be incorporated into the Urban Development Program in oncoming years.

1.3 2009 Urban Development Program Reports

The *2009 Urban Development Program Reports for Ballarat, Greater Bendigo, Latrobe and Wodonga*, as well as the *2009 Urban Development Program Annual Report* for metropolitan Melbourne and the Geelong region, are available online at **www.dpcd.vic.gov.au/urbandevelopmentprogram**

Interactive online maps are also available. MapsOnline enables users to search for specific projects, generate reports and print or download maps and statistical reports. It allows users to search for specific land supply areas by region or municipality, estate name, Melway reference, street address or lot number.

To access the UDP MapsOnline visit **www.land.vic.gov.au/udp**

For more information about the Urban Development Program, email the Department of Planning and Community Development at **urbandevelopment.program@dpcd.vic.gov.au**

2.0 Approach & Methodology

The following provides a brief outline of the major methodologies and approach in the assessment of recent residential lot construction, residential land supply, projections of demand and determining adequacy of land stocks. In addition, key definitions of terms used within the following assessment are detailed.

Information is presented at both a Statistical Local Area (SLA) and suburb (VicMap locality boundaries) level. A table and associated map highlights the location of these boundaries, this is located within the data appendices.

Note that for the purposes of this report the regional component of the expanded Urban Development Program is referred to as the 'Regional Urban Development Program'.

Estimating future dwelling requirements

The Victorian Population and Household Projections 2006–2036, released by the Department of Planning and Community Development and outlined in *Victoria in Future 2008*, are used by the Regional Urban Development Program as the basis for determining projected demand for residential allotments. Demand information is assessed at both a municipal level and by the component Statistical Local Areas (SLAs).

The Urban Development Program will continue to report on changes to projected demand levels within these areas, and incorporate updated *Victoria in Future 2008* population and household projections as they become available.

Residential Land

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

- **Vacant Lots:** Existing residential vacant lots, sized less than 1,000sqm if zoned Residential 1 (R1Z) or no size limitation if zoned Mixed Use (MUZ) or Township (TZ). A vacant lot is defined as no existing habitable dwelling or 'significant' existing use, eg. playgrounds.
- **Minor Infill:** Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less from 1,000sqm to 1ha.
- **Major Infill:** Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha.
- **Broadhectare:** Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.
- **Future Residential:** Land identified by the pertinent municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which is has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.
- **Low Density:** Land zoned Low Density Residential (LDRZ) or Rural Living (RLZ).

Residential Lot Construction

Residential lot construction has been determined via the processes established within the State Governments Housing Development Data project. It involves the extensive cleaning of the residential cadastre and the application of this cadastre to the land supply types identified above.

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

Construction activity has been assessed on an annual basis as at July of each year from 2006 to 2009.

Vacant lots

As defined above. Vacant residential lots were identified via customised GIS software that has been developed by Spatial Economics, to visually recognise built structures as well as vacant allotments. The software has the ability to recognise via colour intensity and colour distribution associated with built structures and straight lines created by roof- lines. This combined with titling and zoning information allows the recognition of both built structures on a parcel by parcel basis, as well as the incidence of vacant lots.

Lot Yields

Lot yields have been established on a parcel by parcel basis for the following land supply types: minor infill, major infill, broadhectare and future residential.

In establishing the lot yield for each individual land parcel the following information was used: incidence and location of native vegetation, zoning, natural features such as creeks, old mineshafts, escarpments, floodways, localised current/recent market yields, existing studies such as structure plans, municipal strategic statements etc.

In addition to site specific issues, 'standard' land development take-outs are employed, including local and regional. The amount/proportion of such take-outs are dependent on the site of the land parcel i.e. a 1ha site will have less take-outs than say a 50ha site. This approach has been utilised by both the residential and industrial land supply assessments since 2004 in the metropolitan Urban Development Program.

Further intelligence and verification is sourced from local council planning officers.

A small number of broadhectare supply sites have been allocated a zero lot yield because they were assessed as being unlikely to be developed over the next 15 years due to issues such as significant ownership fragmentation on relatively small parcels of land.

Development Timing

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

- 1 to 2 years (2010–2011)
- 3 to 5 years (2012–2014)
- 6 to 10 years (2015–2019)
- 11 years or more (2020 and beyond).

Land identified for development over the next 2 years is available for residential purposes, and the required permits to subdivide the land generally exist and are being implemented.

Land parcels identified for development in 3 to 5 years are normally zoned, or may have rezonings finalised or approaching finalisation. They may also have permits to subdivide the land. Some degree of confidence can be applied to the timing and staging of these developments.

Where land has been identified as 'Future Residential' there are no associated timings, as these cannot be confidently applied until such time the land is zoned to allow residential development to occur. Similarly, land which has been lies within an Urban Growth Zone, where a precinct structure plan has not been approved, falls into a similar category. At such time a precinct structure plan has been prepared and approved, potential timings of residential development associated to these areas can be applied with a higher degree of confidence.

It should also be noted that timing of lot construction is cyclical, and highly dependent on underlying demand, economic cycles and industry capacity. This can mean that stated development intentions will vary from on-the-ground construction activity over time and by location. However, it is highly accurate in terms of the general direction and amount of growth.

Development timings have only been established for both Major Infill land supply stocks and broadhectare land.

Anticipated development timings are primarily sourced from existing planning permits, historic and current market activity, knowledge of industry capacity, projected demand and most importantly intelligence from local council staff.

Low density

Low density residential allotments have been established via the assessment of the cadastre and zoning information. All allotments zoned either Rural Living (RLZ) and Low Density Residential (LDRZ) is included. Custom technology as described above was utilised to establish the stock of vacant low density allotments, this was subsequently verified via a manual process in conjunction with aerial imagery.

Assessing adequacy

A key purpose of the Regional Urban Development Program is to identify if sufficient residential land is available to meet projected dwelling requirements within the relevant municipal area. Sufficient stock of residential land is required to maintain an ongoing supply to the market and to contribute to:

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

For the purpose of reporting on the adequacy of residential stocks, the Regional Urban Development Program assesses the existing stock of residential land (Minor Infill, Major Infill, Broadhectare and Future Residential) relative to projected demand. Adequacy of land stocks is presented by the number of years of supply.

Years of supply is undertaken at both a municipal level (total) and by Statistical Local Area. Years of supply is expressed for both the total zoned stocks of identified residential land and future residential land stocks.

3.0 Recent Activity

This section of the report covers the trends and shifts in building activity across the municipality of Ballarat, and provides an insight into proposed future residential development activity.

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

Section 3 of the report details the recent activity in terms of residential lot construction, dwelling approvals and sales values achieved across the municipal area of Ballarat. Residential lot construction activity is detailed from July 2006 to July 2009 and is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential lot construction is further analysed by supply type/location, namely:

- Minor Infill;
- Major Infill;
- Broadhectare; and
- Low Density.

Analysis of the median sales value achieved by supply type/location for both vacant land and separate houses is presented.

3.1 Residential Building Approvals

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Ballarat has averaged 787 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. Graph 3.1 illustrates the amount of building approval activity by dwelling type on a quarterly basis for the municipal area of Ballarat.

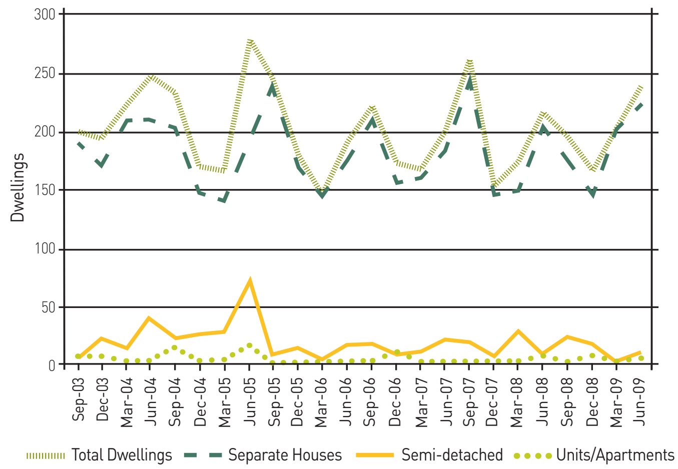
The vast majority of building approvals (93%) over the last three years from 2008/09 have been for separate houses, 6% for semi-detached dwellings and 1% for units/apartments.

The majority (39% or 322 per annum) of building approval activity since 2006/07 has been located within the Statistical Local Area (SLA) of Ballarat – Inner North. The Inner North comprises the suburbs of Alfredton, Miners Rest, Nerrina, Delacombe and a component of Brown Hill. Similarly, there was significant (36% or 293 per annum) building approval activity within the SLA of Ballarat – South, which includes the suburbs of Sebastopol, Canadian and Mount Helen.

Within the Ballarat – Central SLA there was 170 residential dwelling approvals per annum from 2006/07 to 2008/09, representing 21% of the municipalities total approval activity. The Ballarat Central SLA includes the suburbs of Redan, Brown Hill, Ballarat East and Black Hill.

There was negligible building approval activity within the SLA of Ballarat – North.

Graph 3.1: Number of Residential Building Approvals, 2003/04 to 2008/09



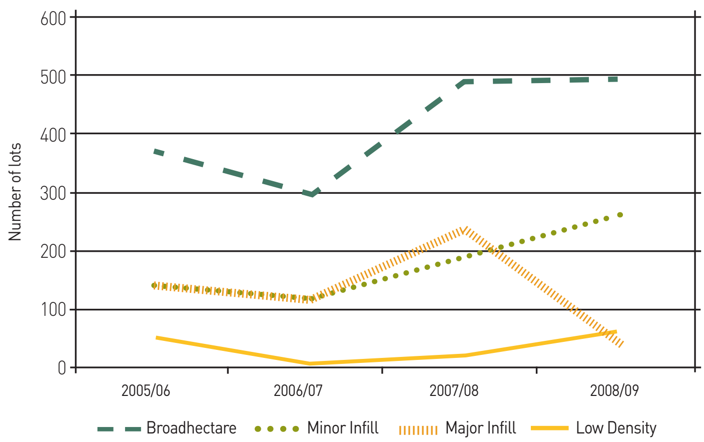
Source: Australian Bureau of Statistics, Catalogue No. 8731.0

3.2 Residential Lot Construction

Analysis has been undertaken to determine on a lot by lot basis the location and amount of residential lot construction activity from Jul 2006 to July 2009. Lot construction activity has been classified into distinct supply types and or supply locations as defined above.

Graph 3.2 summarises the amount of residential lot construction by supply type for the municipal area of Ballarat.

Graph 3.2: Number of Residential Lots Constructed by Supply Type, 2005/06 to 2008/09



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

From 2005/06 to 2008/09 there was an average annual residential lot construction of 756. The majority (54%) were broadhectare lots, 23% were Minor Infill, 18% Major Infill and 5% low density.

In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2006/07 at 546 lots constructed and 'peaked' in 2007/08 at 930 lots.

Lot construction and residential building approval activity as measured from 2005/06 to 2008/09 aligns in terms of the identified volume.

3.2.1 Minor Infill Lot Construction

Minor infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 177 lots per annum. This represents 23% of all residential lot construction activity across the municipal area. Minor infill lot construction activity was spread across the majority of the established urban area suburbs of Ballarat. However, there was relatively significant minor infill lot construction activity within the suburbs of Sebastopol (22%), Ballarat East (11%), Brown Hill (8%) and Wendouree (8%).

As measured annually from 2005/06 to 2008/09, the amount of minor infill lot construction activity has varied significantly. In 2006 there were approximately 137 minor infill lots constructed, declining to 124 in 2006/07, increasing to 188 lots in 2007/08 and 260 lots in 2008/09.

3.2.2 Major Infill Lot Construction

Major infill lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 134 lots per annum. This represents 18% of all residential lot construction activity across the municipal area. There was relatively substantial major infill lot construction activity within the suburbs of Delacombe (28%), Wendouree (20%), Newington (11%) and Mitchell Park (10%).

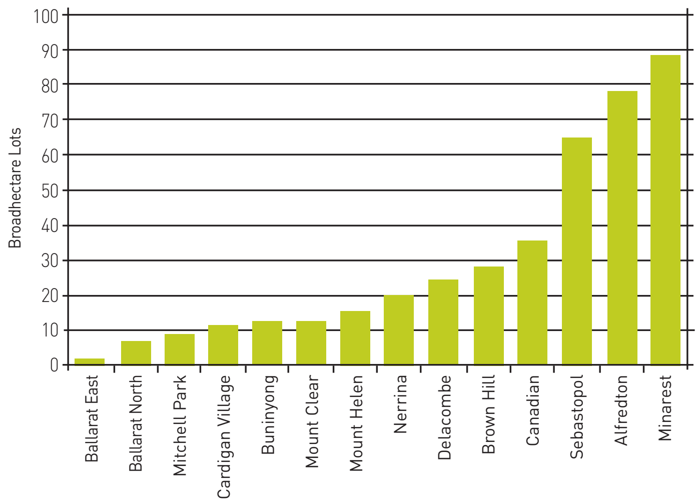
As measured annually from 2005/06 to 2008/09, the amount of major infill lot construction activity has varied significantly. In 2005/06 there were approximately 141 major infill lots constructed, declining to 118 in 2006/07, increasing to 234 lots in 2007/08 and declining to 42 lots in 2008/09.

3.2.3 Broadhectare Lot Construction

Broadhectare lot construction activity as measured from 2005/06 to 2008/09 across the municipal area of Ballarat averaged 410 lots per annum. This represents 54% of all residential lot construction activity across the municipal area. There was relatively substantial broadhectare lot construction activity within the suburbs of Miners Rest (22%), Alfredton (19%) and Sebastopol (16%). Graph 3 summarises the average annual amount of broadhectare lots constructed from 2005/06 to 2008/09 by suburb.

As measured annually from 2005/06 to 2008/09, the amount of broadhectare lot construction activity has varied significantly. In 2005/06 there was approximately 370 broadhectare lots constructed, declining to 297 in 2006/07, increasing to 487 lots in 2007/08 and 491 lots in 2008/09.

Graph 3.3: Average Annual Number of Broadhectare Lots Constructed by Suburb, 2005/06 to 2008/09



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

3.2.4 Low Density Lot Construction

Low density lot construction activity as measured from 2006 to 2009 across the municipal area of Ballarat averaged 36 lots per annum. This represents 5% of all residential lot construction activity across the municipal area. There was relatively significant low density lot construction activity within the suburbs of Cardigan (43%), Warrenheip (13%) and Mitchell Park (10%).

3.3 Residential land and House Prices

Analysis has been undertaken in conjunction with the Department of Planning and Community Development to match sales information for both vacant land and separate house sales by supply location. In addition, sales values have been determined for the entire municipal area. Sales values are a key 'outcome' indicator that can assist in determining the 'state of the land supply' market.

Tables 3.1 and 3.2 summarise the median sales value of both vacant residential land and separate houses by supply type from 2005/06 to 2008/09.

In 2005/06 the median sales value for a vacant residential allotment was $89,000 this increased to $95,000 in 2007/08 and remained at this value in 2008/09. From 2005/06 to 2008/09, the median sales value for a vacant residential allotment increased by 1.6% per annum. Whereas, the median sales value for broadhectare vacant lots decreased by 0.5% per annum, vacant lots within major infill sites increased by 6% per annum and minor infill declined by 1.9% per annum.

Table 3.1: Median Sales Price for Vacant Residential Allotments by Supply Type

	2005/06	2006/07	2007/08	2008/09
Broadhectare	$ 92,000	$ 95,000	$ 95,000	$ 90,000
Major Infill	$ 71,950	$ 72,000	$ 84,500	$ 91,000
Minor Infill	$ 110,000	$ 73,500	$ 90,000	$ 102,000
Ballarat LGA	**$ 89,000**	**$ 92,000**	**$ 95,000**	**$ 95,000**

Source: Department of Planning and Community Development

Notes: Sale price data is only for vacant residential lots under 1,000sqm. Sales values are as at the nominal year. Supply location definitions refer to Approach/Methodology. Total LGA sale values are for the entire municipality, not a total for the supply locations illustrated.

Sales data within the stated supply areas are for vacant lots contained within the supply types.

As measured from 2005/06 to 2009/09, the median sales value for a separate house increased by 1.7% per annum, increasing from $212,000 to $227,000. Whereas, the median sales value for a separate house located on a broadhectare lot increased by 6.5% per annum. In 2008/09 the median sales value of a separate house located on a broadhectare development was $305,000, a 34% difference to the median sales value for all separate house sales across the municipality.

The median sales value of a separate house located within minor infill developments in 2008/09 was $165,000, declining from $189,000 in 2005/06.

Table 3.2: Median Sales Price for Separate Houses by Supply Type

	2005/06	2006/07	2007/08	2008/09
Broadhectare	$ 237,500	$ 298,000	$ 295,000	$305,000
Major Infill	NA	NA	NA	NA
Minor Infill	$ 189,000	$ 190,245	$ 235,000	$165,000
Ballarat LGA	**$ 212,000**	**$ 220,000**	**$ 225,000**	**$227,000**

Source: Department of Planning and Community Development

Notes: Sale price data is only for separate houses, it does not include flats, units etc.
Sales values are as at the nominal year. Supply location definitions refer to Approach/Methodology. Total LGA sale values are for the entire municipality, not a total for the supply locations illustrated.

Sales data within the stated supply areas are for separate house sales contained within the supply types.

Summary & Conclusions

From 2005/06 to 2008/09 there was an average annual residential lot construction of 756. The majority (54%) were broadhectare lots, 23% were minor infill, 18% major infill and 5% low density.

As measured from 2006/07 to 2008/09 residential building approval activity within the municipal area of Ballarat has averaged 787 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent.

In 2005/06 the median sales value for a vacant residential allotment was $89,000 this increased to $95,000 in 2007/08 and remained at this value in 2008/09. From 2005/06 to 2008/09, the median sales value for a vacant residential allotment increased by 1.6% per annum.

Analysis of the amount of building approvals, residential lot construction and price movements of vacant residential allotments indicates a functioning residential land market within Ballarat i.e. land sale price movements below the consumer price index and lot production broadly matching dwelling construction (building approvals).

4.0 Residential Land Supply

Section 4 of the report details the stock (measured in lots) of residential land across the municipality of Ballarat as at July 2009. Residential lot stock/supply is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential land supply is further analysed by supply type/location, namely:

- Vacant Lots
- Minor Infill;
- Major Infill;
- Broadhectare;
- Future Residential; and
- Low Density.

For both major infill and broadhectare land supply areas, anticipated lot construction timing is presented. This refers to the likely timing of lot construction, not dwelling construction.

Table 4.1 details the residential land supply, measured in lots, by supply type across the municipal area of Ballarat as at July 2009. In total (excluding existing vacant residential lots) there is a residential lot supply of approximately 32,469. This is comprised of:

- 4,706 zoned broadhectare lots (14% of supply);
- 3,597 minor infill lots (11% of supply);
- 1,017 major infill lots (3% of supply);
- 642 vacant low density residential lots (2% of supply); and
- 22,507 designated future residential lots (69% of supply).

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

Table 4.1: Residential Lot Potential by Supply Type, 2009

SUBURB	MINOR INFILL	MAJOR INFILL	BROAD HECTARE	FUTURE RES	LOW DENSITY	TOTAL
ALFREDTON	130	49	1,136			**1,315**
BALLARAT CENTRAL	23					**23**
BALLARAT EAST	252	192	164		5	**613**
BALLARAT NORTH	81	37				**118**
BALLARAT WEST				18,800		**18,800**
BLACK HILL	75	9				**84**
BONSHAW			600		10	**610**
BROWN HILL	446	147	381		1	**975**
BUNINYONG	474	51			90	**615**
CANADIAN	134	169	503		3	**809**
CARDIGAN			18	3,200	64	**3,282**
CRESWICK	3				3	**6**
DELACOMBE	34		549		5	**588**
DURHAM LEAD					50	**50**
EUREKA	20					**20**
GOLDEN POINT	55					**55**
INVERMAY					59	**59**
INVERMAY PARK	39	16	100			**155**
LAKE GARDENS		32				**32**
LAKE WENDOUREE	30					**30**
MAGPIE					69	**69**
MINERS REST	683	11	277	507		**1,478**
MITCHELL PARK	48				35	**83**
MOUNT CLEAR	90	43	146		13	**292**
MOUNT HELEN	294	53	108		38	**493**
MOUNT PLEASANT	115	23	447			**585**
MOUNT ROWAN					4	**4**
NERRINA	226	11	47		23	**307**
NEWINGTON	12					**12**
REDAN	58					**58**
SCOTCHMANS LEAD					37	**37**
SEBASTOPOL	234	156	230		3	**623**
SMYTHES CREEK					3	**3**
SOLDIERS HILL	18					**18**
WARRENHEIP	5				127	**132**
WENDOUREE	18	18				**36**
BALLARAT LGA	**3,597**	**1,017**	**4,706**	**22,507**	**642**	**32,469**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

4.1 Vacant lots

A detailed assessment utilising custom GIS software to detect the incidence and location of vacant residential lots was undertaken as at July 2009. A vacant residential lot is defined as any lot that is sized less than 1,000sqm, has no existing residential dwelling/or existing use and is zoned Residential 1(R1Z). In addition vacant lots zoned Township (TZ) and Mixed Use (MUZ) is identified however, no land size is specified.

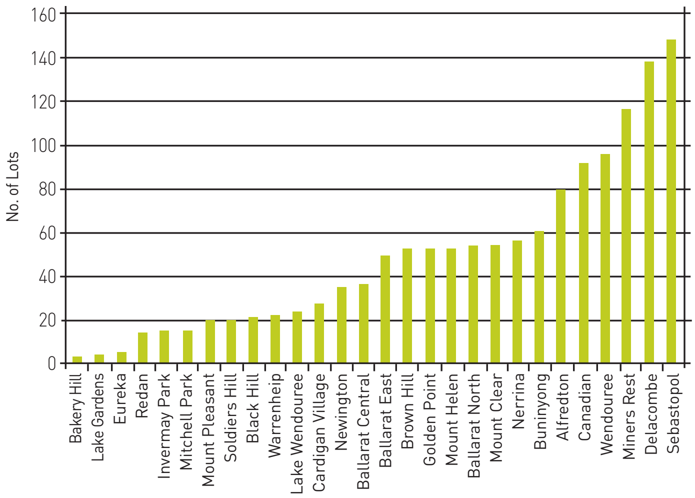
As at July 2009 there was a total residential vacant lot stock of 1,359, of which 92% was zoned Residential 1 (R1Z). There were 83 lots zoned Mixed Use (MUZ) and 27 zoned Township (TZ). The distribution of this vacant lot stock by suburb is illustrated in Graph 4.1.

The suburbs with relatively high volumes of vacant lot stock tend to be the location of broadhectare style developments, such suburbs include:

- Sebastopol – 147 lots;
- Delacombe – 138 lots;
- Miners Rest – 116 lots;
- Wendouree – 95 lots;
- Canadian – 91 lots; and
- Alfredton – 79 lots.

The existing stock of vacant allotments has the potential to satisfy approximately 1.7 years of projected demand. The stock of vacant lots relative to the estimated number of existing dwellings is 3.4%. These two indicators are considered to illustrate a land supply market that is functioning in terms of short and longer term land requirements.

Graph 4.1: Stock of Vacant Residential Allotments, 2009



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

4.2 Minor Infill Supply

As at July 2009, there was a residential lot capacity within minor infill sites of approximately 3,600. The location of these minor infill sites are widely distributed across the municipal area of Ballarat, there are particularly high numbers of minor infill lot stock in:

- Miners Rest (683 lot potential or 19% of total Minor Infill supply);
- Buninyong (474 lot potential or 13% of total Minor Infill supply);
- Brown Hill (446 lot potential or 12% of total Minor Infill supply); and
- Mount Helen (294 lot potential or 8% of total Minor Infill supply).

Minor infill lot potential represents 36% of the total existing zoned residential land supply across the municipal area of Ballarat. There are 648 minor infill sites across the municipality.

4.3 Major Infill Supply

As at July 2009, there was a residential lot capacity within major infill sites of approximately 1,000. There are particularly high numbers of major infill lot stock in:

- Ballarat East (192 lot potential or 19% of total major infill supply);
- Canadian (169 lot potential or 17% of total major infill supply);
- Sebastopol (156 lot potential or 15% of total major infill supply); and
- Brown Hill (147 lot potential or 14% of total major infill supply).

Major infill lot potential represents 10% of the total existing zoned residential land supply across the municipal area of Ballarat. There are 50 major infill sites across the municipality.

Table 4.2: Anticipated Lot Construction Activity – Major Infill, 2009

SUBURB	DEVELOPMENT TIMING				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
ALFREDTON	25			24	**49**
BALLARAT EAST		142	50		**192**
BALLARAT NORTH	0	12	25	0	**37**
BLACK HILL	0	0	9	0	**9**
BROWN HILL	2	50	95	0	**147**
BUNINYONG			51		**51**
CANADIAN	92	57	20		**169**
INVERMAY PARK			16		**16**
LAKE GARDENS		32			**32**
MINERS REST				11	**11**
MOUNT CLEAR	10	17	16		**43**
MOUNT HELEN	23	30			**53**
MOUNT PLEASANT			23		**23**
NERRINA	0	0	11	0	**11**
SEBASTOPOL			156		**156**
WENDOUREE		18			**18**
BALLARAT LGA	**152**	**358**	**472**	**35**	**1,017**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 100 lots per annum will be constructed within major infill sites.

4.4 Broadhectare Supply

As at July 2009, there was a residential lot capacity within broadhectare areas of approximately 4,700. There are particularly high numbers of zoned broadhectare lot stock in:

- Alfredton (1,136 lot potential or 24% of total broadhectare supply);
- Bonshaw (600 lot potential or 13% of total broadhectare supply);
- Delacombe (549 lot potential or 12% of total broadhectare supply); and
- Canadian (503 lot potential or 11% of total broadhectare supply).

Broadhectare lot potential represents 47% of the total existing zoned residential land supply across the municipal area of Ballarat.

Table 4.3: Anticipated Lot Construction Activity – Broadhectare, 2009

SUBURB	DEVELOPMENT TIMING				TOTAL
	1-2 years	3-5 years	6-10 years	11+ years	
ALFREDTON	318	437	381		**1,136**
BALLARAT EAST		60	104		**164**
BONSHAW	206	374	20		**600**
BROWN HILL	33	132	216		**381**
CANADIAN	21	274	208		**503**
CARDIGAN		18			**18**
DELACOMBE	90	185	274		**549**
INVERMAY PARK			100		**100**
MINERS REST	147	130			**277**
MOUNT CLEAR	66		80		**146**
MOUNT HELEN	88		20		**108**
MOUNT PLEASANT			447		**447**
NERRINA	22		25		**47**
SEBASTOPOL		33	197		**230**
BALLARAT LGA	**991**	**1,643**	**2,072**		**4,706**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 527 lots per annum will be constructed within existing zoned broadhectare areas.

4.5 Future Residential Land Supply

Analysis has been undertaken in conjunction with municipal planning officers to identify the location and associated lot yield of future residential land stocks. Future residential land stocks are identified by the Ballarat City Council, and contained within various municipal planning policy and strategy planning documents.

Future residential land stocks are not zoned to support immediate 'normal' residential development, and rezoning and structure planning processes are required before normal residential development proceeds.

Within the municipal area of Ballarat, there is an estimated lot potential within Future Residential areas of approximately 21,826. Of this lot potential, 83% is located within the Ballarat West Growth Area. Currently the land designated for urban development within the Ballarat Growth Area is zoned Urban Growth (UGZ). The Urban Growth Zone, in conjunction with PSPs, will:

- manage the transition of non-urban land into urban land;
- encourage the development of well-planned and well-serviced new urban communities in accordance with an overall plan;
- reduce the number of development approvals needed in areas where an agreed plan is in place; and
- safeguard non-urban land from use and development that could prejudice its future urban development.

Future residential land zoned UGZ is located within the precincts of Greenhalghs Road, Bonshaw Creek, Carngham Road and Alfredton West.

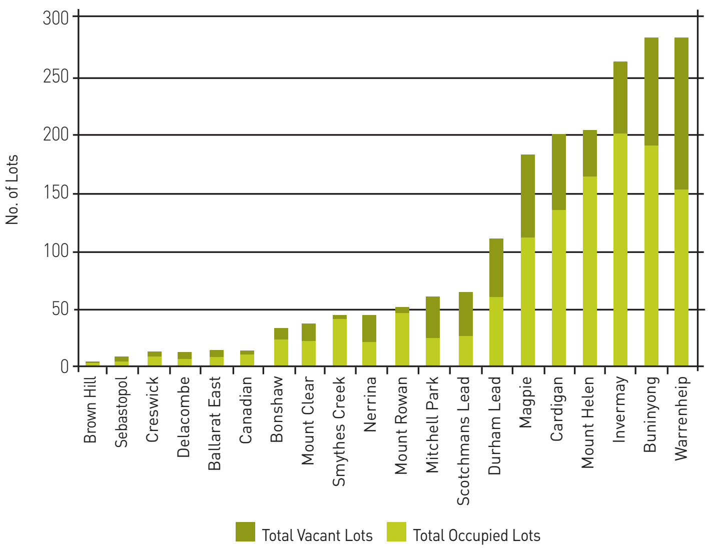
There is currently a lot potential of approximately 3,707 that have been identified by the municipality of Ballarat for future residential development that is currently not zoned for normal residential development. This lot potential is located in Cardigan (3,200 lots) and Miners Rest (507 lots).

4.6 Low Density Supply

The stock of both occupied and vacant low density residential allotments have been determined on a lot by lot basis as at July 2009. A low density residential allotment is defined as all allotments that are zoned Low Density Residential (LDRZ) and Rural Living (RLZ). Occupied is defined as evidence of a 'habitable' dwelling and vacant is defined as no evidence of a habitable dwelling via the interpretation of aerial imagery.

As at July 2009 across the municipality of Ballarat there was a total lot stock of low density allotments of 1,904. Of this stock, 642 lots were vacant, a land vacancy rate of 34%. Graph 4.2 summarises the stock of both occupied and vacant low density residential allotments by suburb.

Graph 4.2: Stock of Vacant and Occupied 'Low Density' Allotments, 2009



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

The vast majority (79%) of the low density lot stock is located within the suburbs of Durham Lead, Magpie, Cardigan, Mount Helen, Invermay, Buninyong and Warrenheip. Similarly, these suburbs are the location of the majority (77%) of the existing stock of vacant low density allotments. Section 4.7 of this report provides an overview map of the current status of low density zoned land within the City of Ballarat.

Summary & Conclusions

In total (excluding existing vacant residential lots) there is a residential lot supply of approximately 32,469. This is comprised of:

- 4,706 zoned broadhectare lots (14% of supply);
- 3,597 minor infill lots (11% of supply);
- 1,017 major infill lots (3% of supply);
- 642 vacant low density residential lots (2% of supply); and
- 22,507 designated future residential lots (69% of supply).

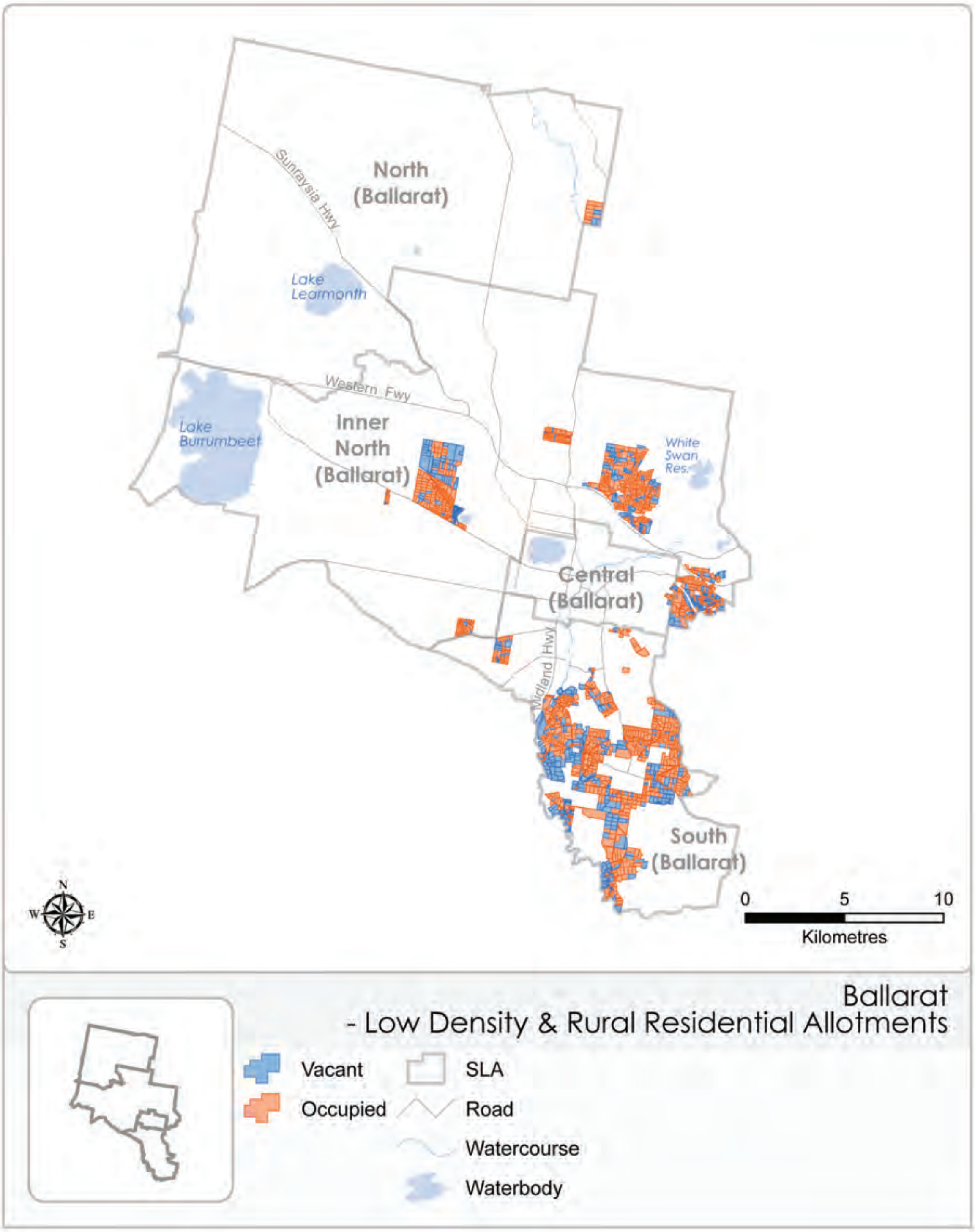
As at July 2009 there was a total residential vacant lot stock of 1,359, 92% of which was zoned Residential 1 (R1Z). There were 83 lots zoned Mixed Use (MUZ) and 27 zoned Township (TZ).

Within the municipal area of Ballarat, there is an estimated lot potential within Future Residential areas of approximately 22,507. Of this lot potential, 83% is located within the Ballarat West Growth Area.

Based on the existing stock of vacant lots, identified zoned supply and identified future residential land stocks relative to recent construction rates and projected demand there is sufficient land to satisfy short, medium and long-term demand for residential lots.

4.7 Low Density Overview Maps

Overview Map 1: Vacant and Occupied Low Density Allotments, 2009



5.0 Projected Demand

This report incorporates the most recently available demand figures to project dwelling requirements and future adequacy of residential land. These figures currently use the *Victoria in Future 2008* projections as the basis for demand, which are updated in line with state population and household projections.

Victoria in Future 2008 is the Victorian Government's official population and household projections. Information is provided for state-wide, regional and metropolitan areas as well as local government areas. *Victoria in Future 2008* reflects the latest available trends such as changes to levels of immigration or economic conditions, or changes to policy affecting population growth locations and levels, and subsequent demand for housing.

Victoria in Future 2008 projections cover the period 2006 to 2056 for the state, regional Victoria and Melbourne; for 2006 to 2036 for the Statistical Divisions in regional Victoria; and for 2006 to 2026 for local government areas and statistical local areas.

Overall, regional Victoria is projected to grow by 477,000 people in the next 30 years, compared with 320,000 in the previous 30 years. Most of this growth is projected to come from net migration from Melbourne. Strong population growth can be expected in:

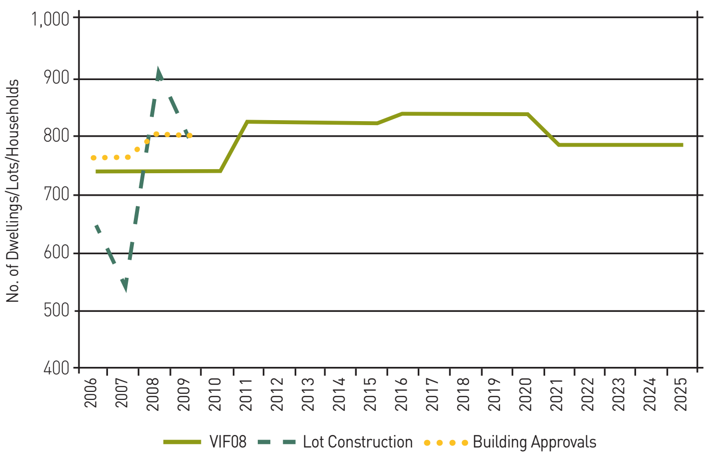
- regional centres, which have diverse employment opportunities and services;
- coastal areas, which are popular locations for sea-changers such as young families and retirees; and
- tree change and other 'lifestyle' locations such as rural areas around Melbourne and the regional centres as well as the Alpine areas and the Murray River.

Graph 5.1 summarises the projected demand for residential dwellings for the municipal area of Ballarat.

From 2006 to 2009, it was estimated that there was an average annual demand for residential dwellings of 738. Over the same period, residential lot construction averaged 722 per annum and residential building approvals 780.

From 2011 to 2016 it is projected that the average annual demand across the municipal area of Ballarat to increase to 819, from 2016 to 2021 – 834 per annum, declining to 784 per annum from 2021 to 2026.

Graph 5.1: Projected Demand for Residential Dwellings, 2006 - 2026



Source: Australian Bureau of Statistics, Catalogue No. 8731.0; Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

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

- **Ballarat – Inner North:** 371 dwellings per annum (e.g. Alfredton, Brown Hill, Miners Rest and Ballarat North);
- **Ballarat – South:** 264 dwellings per annum (e.g. Sebastopol, Mount Helen and Buninyong);
- **Ballarat - Central**: 171 dwellings per annum (e.g. Ballarat East, Canadian, Nerrina, Mount Pleasant and Redan); and
- **Ballarat – North:** 6 dwellings per annum.

Summary & Conclusions

From 2006 to 2009, it was estimated that there was an average annual demand for residential dwellings of 738. Over the same period, residential lot construction averaged 722 per annum and residential building approvals 780.

From 2011 to 2016 it is projected that the average annual demand across the municipal area of Ballarat to increase to 819, from 2016 to 2021 – 834 per annum, declining to 784 per annum from 2021 to 2026.

Demand projections broadly align with recent residential lot construction and building approval activity. Similarly, demand projections broadly match anticipated lot construction over the next five years, highlighting that expected construction will meet short-term demand.

6.0 Adequacy of Land Stocks

Analysis has been undertaken to estimate the years of residential land supply by Statistical Local Area. In estimating the years of residential land supply only Minor Infill, Major Infill, zoned broadhectare and future residential land supply types are considered. Demand for residential lots/dwellings is sourced from the Victorian Governments population and household projections *Victoria in Future 2008*. This is a conservative approach as it does not consider the supply of existing vacant lots and demand for low density lots. Table 6.1 summarises the estimated years of residential land supply by SLA for both zoned and future residential land stocks.

Table 6.1: Estimated Years of Residential Land Supply

	LOTS						YEARS OF SUPPLY	
	Minor Infill	Major Infill	Zoned Broad hectare	Total Zoned	Future Res	Total	Total Zoned	Total Future
Ballarat (C) - Central	914	530	479	**1,923**	0	**1,923**	10	0
Ballarat (C) - Inner North	1,505	184	2,508	**4,197**	14,035	**18,232**	10	15+
Ballarat (C) - North	0	0	0	**0**	0	**0**	0	0
Ballarat (C) - South	1,175	303	1,719	**3,197**	7,791	**10,988**	11	15+
Ballarat LGA	**3,594**	**1,017**	**4,706**	**9,317**	**21,826**	**31,143**	**10**	**15+**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

In terms of zoned residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy **10 years** of future demand. This is based on a zoned lot potential of 9,317 lots, of which:

- 4,706 lots are broadhectare;
- 3,594 are minor infill; and
- 1,017 are major infill.

In the assessment of adequacy only 'un-subdivided' land stocks are considered, vacant residential allotments do not form a component to adequacy. This is a deliberate and conservative approach.

Zoned supply by SLA is sufficient to satisfy ten to eleven years. There is no identified zoned stock within the Ballarat North SLA, however projected demand for lots/dwellings is minimal (i.e. 7 dwellings on average per annum from 2010 onwards).

In terms of future residential land supply stocks, there is sufficient land to satisfy over **15 years** of projected demand. There is no future identified residential stock within the SLAs of Central and North. It is expected that projected demand particularly from the Inner North SLA will transfer to both the Central and South SLAs in around 2017 to 2018 (80% build out of existing zoned stocks).

Summary & Conclusions

For zoned residential land stocks, it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy **10 years** of future demand. This is based on a zoned lot potential of 9,300 lots, of which:

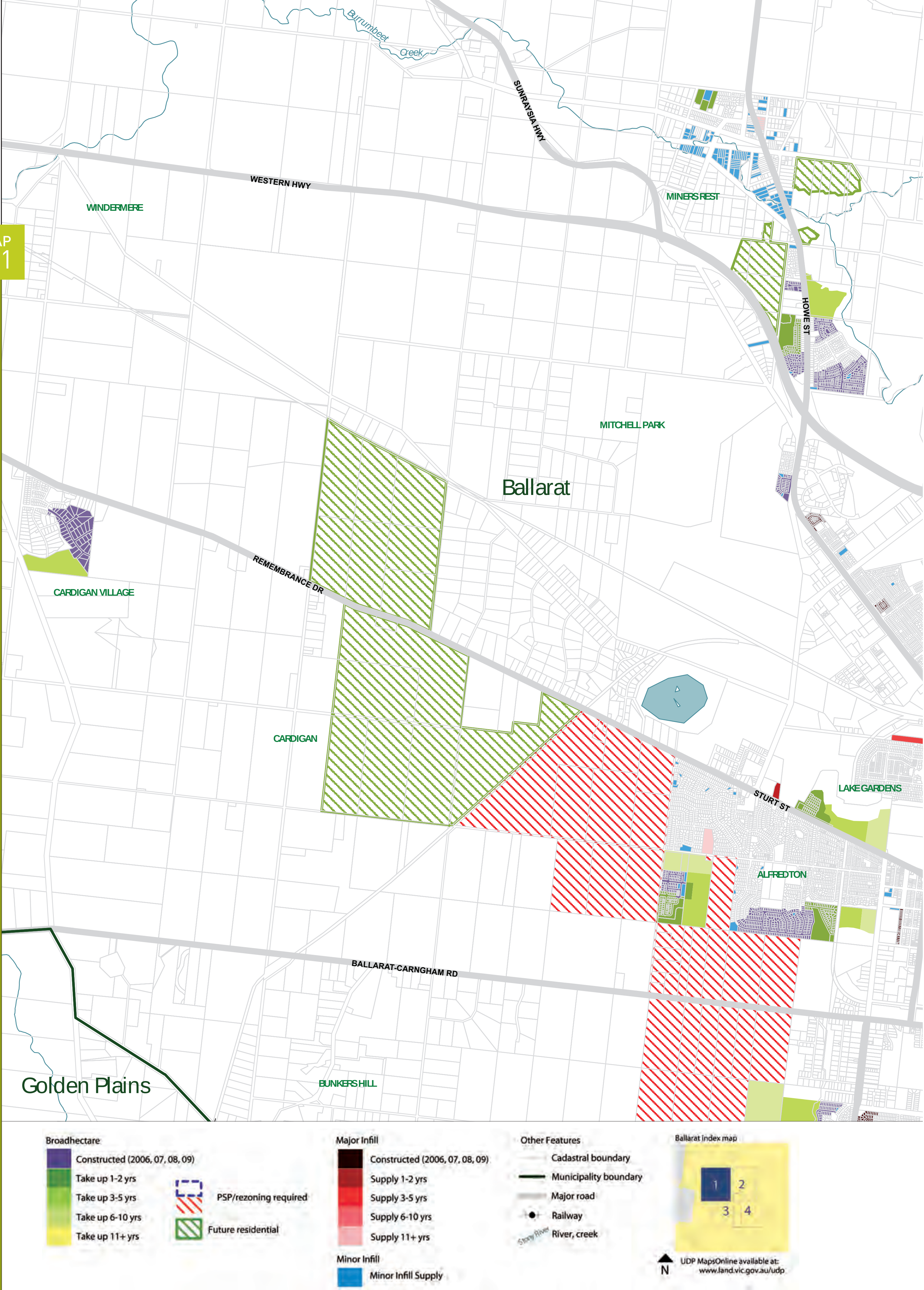
- 4,706 lots are broadhectare;
- 3,594 are minor infill; and
- 1,017 are major infill.

For future residential land supply stocks, there is sufficient land to satisfy over **15 years** of projected demand.

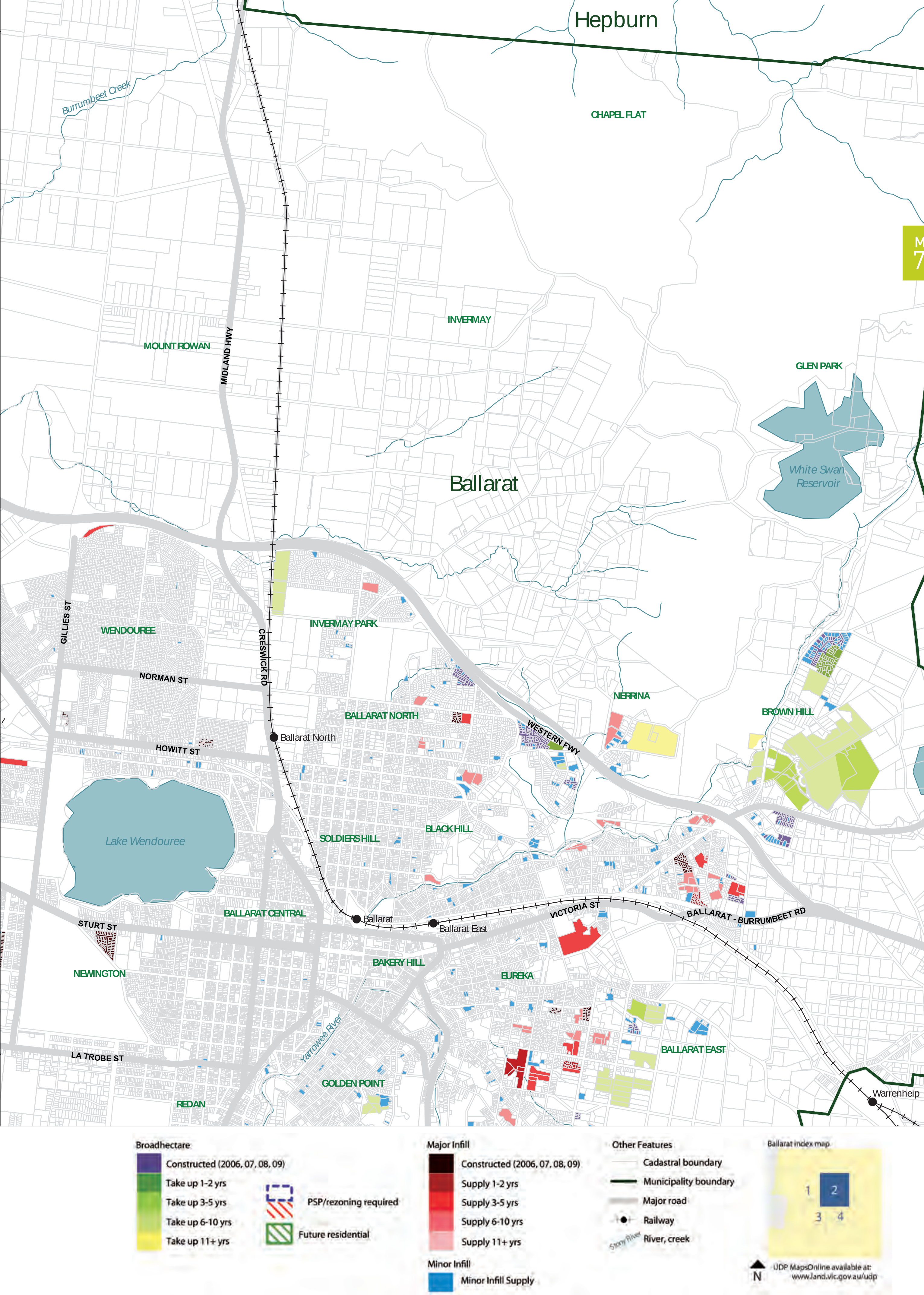
In total there is **over 15 years** supply of residential land stocks across the municipality.

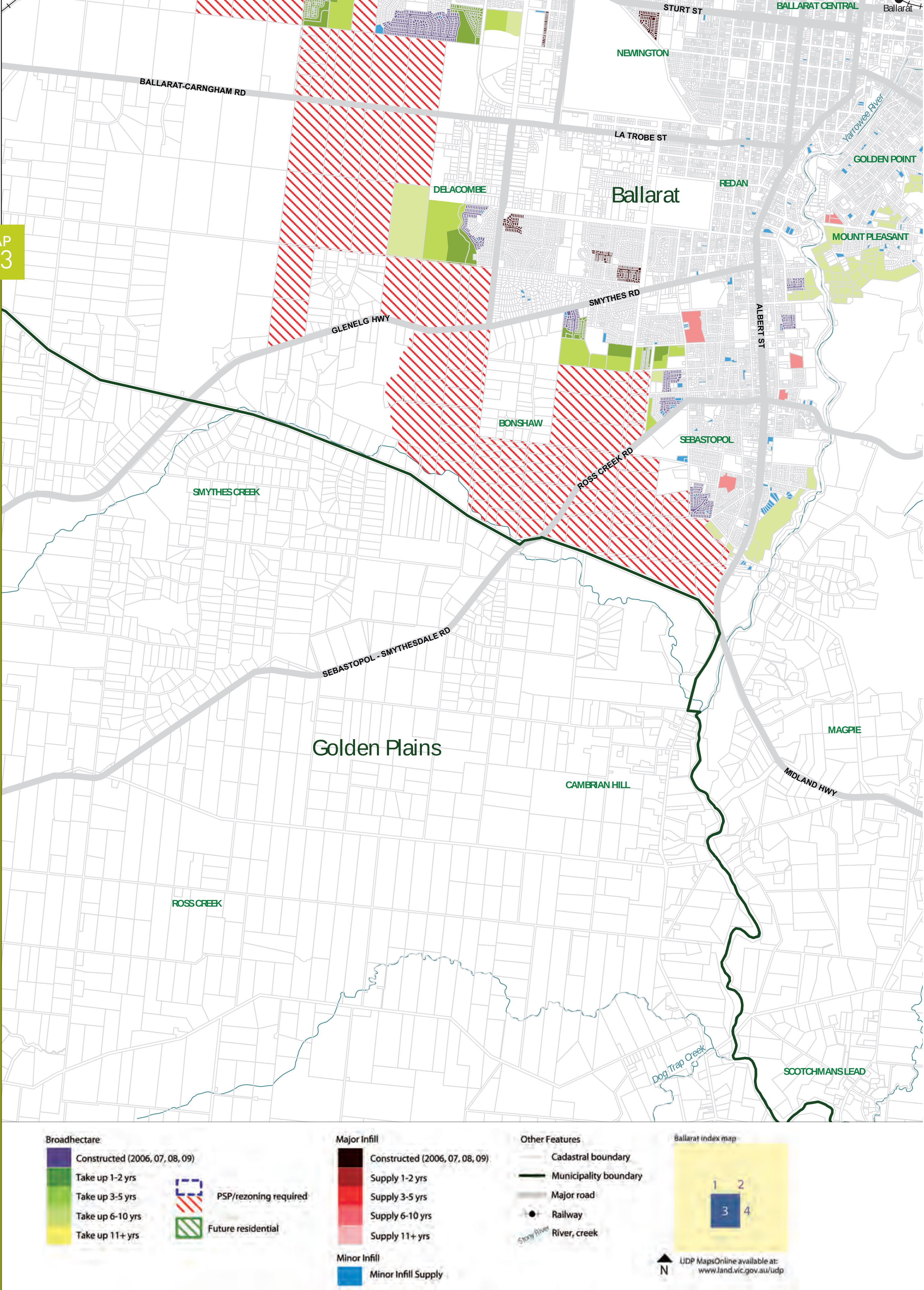
The existing stock of vacant residential allotments is sufficient to satisfy **1.7 years** of demand. It is important that a suitable stock of vacant residential allotments is maintained to satisfy immediate demand for allotments.

7.0 Residential Maps

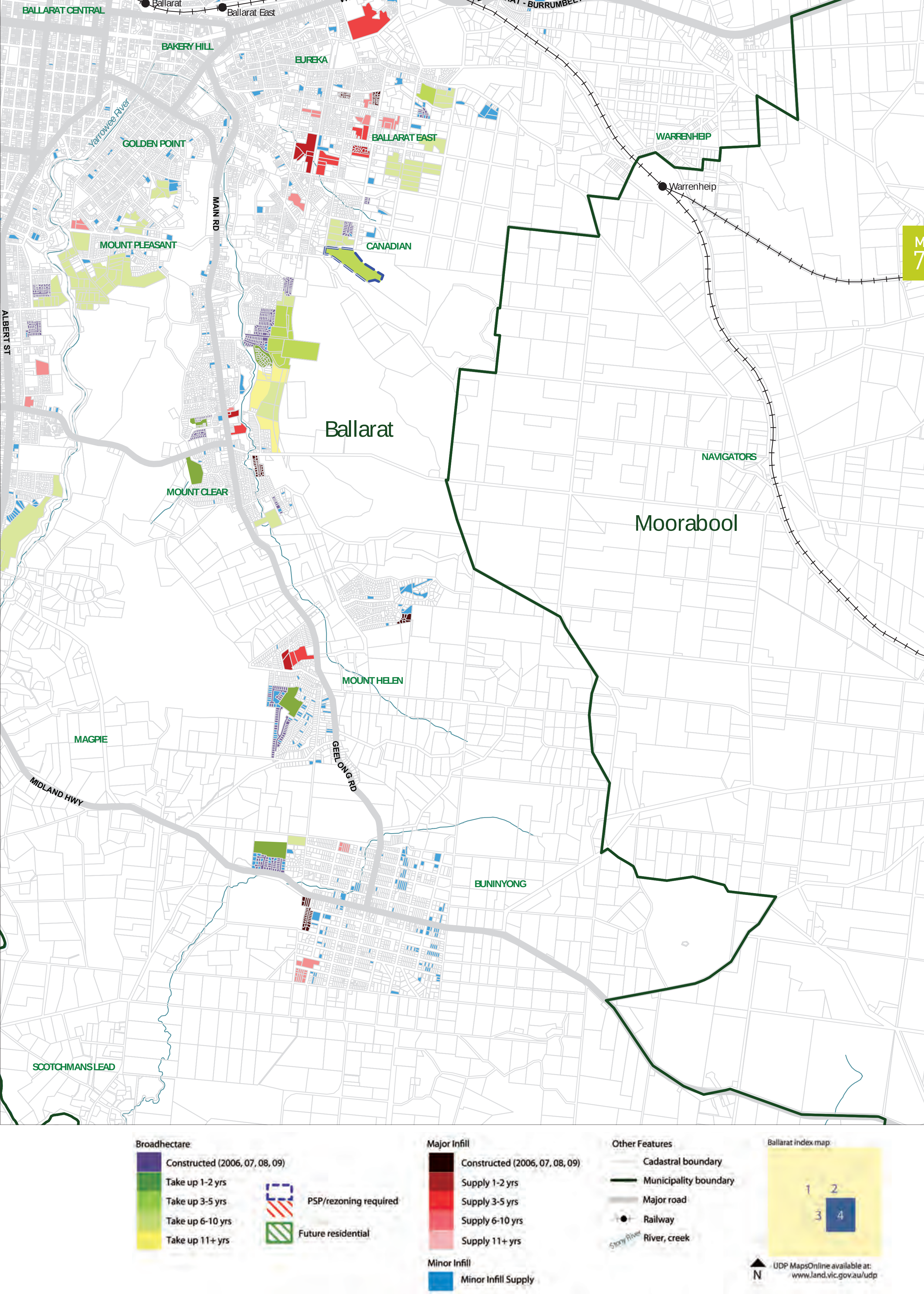


SCALE 1:50,000


Hepburn
Burrumbeet Creek
CHAPEL FLAT
INVERMAY
MOUNT ROWAN
MIDLAND HWY
GLEN PARK
White Swan Reservoir
Ballarat
GILLIES ST
WENDOUREE
INVERMAY PARK
CRESWICK RD
NORMAN ST
NERRINA
BROWN HILL
BALLARAT NORTH
WESTERN FWY
Ballarat North
HOWITT ST
Lake Wendouree
BLACK HILL
SOLDIERS HILL
BALLARAT CENTRAL
VICTORIA ST
BALLARAT - BURRUMBEET RD
STURT ST
Ballarat
Ballarat East
NEWINGTON
BAKERY HILL
EUREKA
Yarrowee River
LA TROBE ST
BALLARAT EAST
GOLDEN POINT
REDAN
Warrenheip
Broadhectare
Constructed (2006, 07, 08, 09)
Take up 1-2 yrs
Take up 3-5 yrs
Take up 6-10 yrs
Take up 11+ yrs
PSP/rezoning required
Future residential
Major Infill
Constructed (2006, 07, 08, 09)
Supply 1-2 yrs
Supply 3-5 yrs
Supply 6-10 yrs
Supply 11+ yrs
Minor Infill
Minor Infill Supply
Other Features
Cadastral boundary
Municipality boundary
Major road
Railway
River, creek
Ballarat index map
1
2
3
4
N
UDP MapsOnline available at: www.land.vic.gov.au/udp
SCALE 1:50,000



SCALE 1:50,000



SCALE 1:50,000

8.0 Residential Tables

TABLE 8.1

Table 8.1: Minor Infill Lot Construction, 2005/06 to 2008/09

SLA	SUBURB	Year of Construction				TOTAL
		2005/06	2006/07	2007/08	2008/09	
Central	ALFREDTON			3	5	**8**
	BALLARAT CENTRAL	6	9	7	5	**27**
	BALLARAT EAST	29	9	18	20	**76**
	BALLARAT NORTH			6	4	**10**
	BLACK HILL		4	2	20	**26**
	BROWN HILL	23	1	8	22	**54**
	CANADIAN	2	9	11	6	**28**
	GOLDEN POINT	2	2	4		**8**
	LAKE WENDOUREE		5	2	6	**13**
	MOUNT PLEASANT	11		9	14	**34**
	REDAN	12	16	7	18	**53**
	SOLDIERS HILL	2		17		**19**
	TOTAL	**87**	**55**	**94**	**120**	**356**
Inner North	ALFREDTON			4	3	**7**
	BALLARAT NORTH			3	3	**6**
	BLACK HILL		1			**1**
	INVERMAY PARK		4			**4**
	LAKE WENDOUREE	1				**1**
	MINERS REST	6	5	4	5	**20**
	MITCHELL PARK				13	**13**
	WENDOUREE	9	7	16	28	**60**
	TOTAL	**16**	**17**	**27**	**52**	**112**
South	BUNINYONG		11	9	11	**31**
	CANADIAN		10	1	12	**23**
	DELACOMBE	1		9		**10**
	MOUNT CLEAR	4		4	12	**20**
	MOUNT HELEN	3				**3**
	SEBASTOPOL	26	31	44	53	**154**
	TOTAL	**34**	**52**	**67**	**88**	**241**
Ballarat LGA		**137**	**124**	**188**	**260**	**709**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.2: Major Infill Lot Construction, 2005/06 to 2008/09

SLA	SUBURB	Year of Construction				TOTAL
		2005/06	2006/07	2007/08	2008/09	
Central	ALFREDTON			24		**24**
	BALLARAT EAST			18	17	**35**
	BROWN HILL	30				**30**
	NEWINGTON		59			**59**
	TOTAL	**30**	**59**	**42**	**17**	**148**
Inner North	BALLARAT NORTH	14				**14**
	MITCHELL PARK	22		30		**52**
	WENDOUREE			108		**108**
	TOTAL	**36**		**138**		**174**
South	BUNINYONG	26				**26**
	DELACOMBE	42	59	24	25	**150**
	MOUNT CLEAR			30		**30**
	MOUNT HELEN	7				**7**
	TOTAL	**75**	**59**	**54**	**25**	**213**
Ballarat LGA		**141**	**118**	**234**	**42**	**535**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.3: Broadhectare Lot Construction, 2005/06 to 2008/09

SLA	SUBURB	Year of Construction				TOTAL
		2005/06	2006/07	2007/08	2008/09	
Central	BALLARAT EAST			11		**11**
	BROWN HILL		5	11		**16**
	CANADIAN	6			18	**24**
	TOTAL	**6**	**5**	**22**	**18**	**51**
Inner North	ALFREDTON	144		53	116	**313**
	BALLARAT NORTH	25				**25**
	BROWN HILL	33		12	55	**100**
	CARDIGAN VILLAGE	21		23		**44**
	DELACOMBE	13	31		15	**59**
	MINERS REST	45	110	160	41	**356**
	MITCHELL PARK	35				**35**
	NERRINA			80		**80**
	TOTAL	**316**	**141**	**328**	**227**	**1,012**
South	BUNINYONG				48	**48**
	CANADIAN	39	23	33	27	**122**
	DELACOMBE				42	**42**
	MOUNT CLEAR		9	15	24	**48**
	MOUNT HELEN		39		23	**62**
	SEBASTOPOL	7	80	89	82	**258**
	TOTAL	**46**	**151**	**137**	**246**	**580**
Ballarat LGA		**368**	**297**	**487**	**491**	**1,643**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.4: Low Density Lot Construction, 2005/06 to 2008/09

SLA	SUBURB	Year of Construction				TOTAL
		2005/06	2006/07	2007/08	2008/09	
Central	BALLARAT EAST	2				**2**
	TOTAL	**2**				**2**
Inner North	CARDIGAN	10			52	**62**
	INVERMAY	4		2	4	**10**
	MITCHELL PARK			15		**15**
	SMYTHES CREEK	3				**3**
	WARRENHEIP	10	7	2		**19**
	TOTAL	**27**	**7**	**19**	**56**	**109**
South	BONSHAW	8				**8**
	BUNINYONG	7		2	4	**13**
	MAGPIE	2			2	**4**
	MOUNT CLEAR	3				**3**
	MOUNT HELEN				2	**2**
	SCOTCHMANS LEAD	2				**2**
	TOTAL	**22**		**2**	**8**	**32**
Ballarat LGA		**51**	**7**	**21**	**64**	**143**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

TABLE 8.5

Table 8.5: Minor Infill Lot Potential, 2009

SLA	SUBURB	NO. OF LOTS
Ballarat (C) - Central	ALFREDTON	21
	BALLARAT CENTRAL	23
	BALLARAT EAST	252
	BALLARAT NORTH	16
	BLACK HILL	39
	BROWN HILL	137
	CANADIAN	104
	EUREKA	20
	GOLDEN POINT	55
	LAKE WENDOUREE	4
	MOUNT PLEASANT	90
	NERRINA	65
	NEWINGTON	12
	REDAN	58
	SOLDIERS HILL	18
	TOTAL	**914**
Ballarat (C) - Inner North	ALFREDTON	109
	BALLARAT NORTH	65
	BLACK HILL	36
	BROWN HILL	309
	DELACOMBE	6
	INVERMAY PARK	39
	LAKE WENDOUREE	26
	MINERS REST	683
	MITCHELL PARK	48
	NERRINA	161
	WARRENHEIP	5
	WENDOUREE	18
	TOTAL	**1,505**
Ballarat (C) - South	BUNINYONG	474
	CANADIAN	30
	DELACOMBE	28
	MOUNT CLEAR	90
	MOUNT HELEN	294
	MOUNT PLEASANT	25
	SEBASTOPOL	234
	TOTAL	**1,175**
Ballarat LGA		**3,594**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.6: Major Infill Lot Potential and Anticipated Development Timing, 2009

SLA	SUBURB	Development Timing				TOTAL
		1-2 years	3-5 years	6-10 years	11+ years	
Central	BALLARAT EAST		142	50		**192**
	BALLARAT NORTH			10		**10**
	BLACK HILL			9		**9**
	BROWN HILL	2	50	75		**127**
	CANADIAN	92	57	20		**169**
	MOUNT PLEASANT			23		**23**
	NERRINA			0		**0**
	TOTAL	**94**	**249**	**187**		**530**
Inner North	ALFREDTON	25			24	**49**
	BALLARAT NORTH		12	15		**27**
	BLACK HILL			0		**0**
	BROWN HILL			20		**20**
	INVERMAY PARK			16		**16**
	LAKE GARDENS		32			**32**
	MINERS REST				11	**11**
	NERRINA			11		**11**
	WENDOUREE		18			**18**
	TOTAL	**25**	**62**	**62**	**35**	**184**
South	BUNINYONG			51		**51**
	MOUNT CLEAR	10	17	16		**43**
	MOUNT HELEN	23	30			**53**
	SEBASTOPOL			156		**156**
	TOTAL	**33**	**47**	**223**		**303**
Ballarat LGA		**152**	**358**	**472**	**35**	**1,017**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

TABLE 8.7

Table 8.7: Broadhectare Lot Potential and Anticipated Development Timing, 2009

SLA	SUBURB	Development Timing				TOTAL
		1-2 years	3-5 years	6-10 years	11+ years	
Central	BALLARAT EAST		60	104		**164**
	CANADIAN			208		**208**
	MOUNT PLEASANT			107		**107**
	TOTAL		**60**	**419**		**479**
Inner North	ALFREDTON	318	437	381		**1,136**
	BROWN HILL	33	132	216		**381**
	CARDIGAN		18			**18**
	DELACOMBE	90	185	274		**549**
	INVERMAY PARK			100		**100**
	MINERS REST	147	130			**277**
	NERRINA	22		25	0	**47**
	TOTAL	**610**	**902**	**996**	**0**	**2,508**
South	BONSHAW	206	374	20		**600**
	CANADIAN	21	274	0		**295**
	MOUNT CLEAR	66		80	0	**146**
	MOUNT HELEN	88		20		**108**
	MOUNT PLEASANT			340		**340**
	SEBASTOPOL		33	197		**230**
	TOTAL	**381**	**681**	**657**	**0**	**1,719**
Ballarat LGA		**991**	**1,643**	**2,072**	**0**	**4,706**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.8: Future Residential Land Supply (lots), 2009

SLA	SUBURB/PRECINCT	UGZ	UNZONED	TOTAL
Ballarat (C) - Inner North	GREENHALGHS RD	3,940		**3,940**
	ALFREDTON WEST	3,214		**3,214**
	CARNGHAM RD	3,174		**3,174**
	CARDIGAN		3,200	**3,200**
	MINERS REST		507	**507**
	TOTAL	**10,328**	**3,707**	**14,035**
Ballarat (C) - South	BONSHAW CREEK	7,791		**7,791**
	TOTAL	**7,791**		
Ballarat LGA		**18,119**	**3,707**	**21,826**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

TABLE 8.9

Table 8.9: Residential Vacant Lot Stock by Zone Type, 2009

SLA	SUBURB	Zone Type			TOTAL
		R1Z	MUZ	TZ	
Central	ALFREDTON	14			**14**
	BAKERY HILL	3			**3**
	BALLARAT CENTRAL	36			**36**
	BALLARAT EAST	47	2		**49**
	BALLARAT NORTH	7			**7**
	BLACK HILL	16			**16**
	BROWN HILL	39			**39**
	CANADIAN	16			**16**
	EUREKA	5			**5**
	GOLDEN POINT	23	30		**53**
	LAKE WENDOUREE	23			**23**
	MOUNT PLEASANT	14			**14**
	NERRINA	2			**2**
	NEWINGTON	35			**35**
	REDAN	14			**14**
	SOLDIERS HILL	20			**20**
	TOTAL	**314**	**32**		**346**
Inner North	ALFREDTON	63	2		**65**
	BALLARAT NORTH	47			**47**
	BLACK HILL	5			**5**
	BROWN HILL	14			**14**
	CARDIGAN VILLAGE			27	**27**
	DELACOMBE	43			**43**
	INVERMAY PARK	15			**15**
	LAKE GARDENS	4			**4**
	LAKE WENDOUREE	1			**1**
	MINERS REST	109	7		**116**
	MITCHELL PARK	15			**15**
	NERRINA	54			**54**
	WARRENHEIP		22		**22**
	WENDOUREE	87	8		**95**
	TOTAL	**457**	**39**	**27**	**523**
South	BUNINYONG	58	2		**60**
	CANADIAN	75			**75**
	DELACOMBE	95			**95**
	MOUNT CLEAR	51	3		**54**
	MOUNT HELEN	53			**53**
	MOUNT PLEASANT	6			**6**
	SEBASTOPOL	140	7		**147**
	TOTAL	**478**	**12**		**490**
Ballarat LGA		**1,249**	**83**	**27**	**1,359**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

Table 8.10: Occupied and Vacant 'Low Density' Lot Stock, 2009

SLA	SUBURB	LDRZ VACANT	LDRZ OCCUPIED	LDRZ VACANCY RATE (%)	RLZ VACANT	RLZ OCCUPIED	RLZ VACANCY RATE (%)	TOTAL VACANT LOTS	TOTAL VACANCY RATE (%)
Central	BALLARAT EAST				5	8	38%	5	38%
	TOTAL				**5**	**8**	**38%**	**5**	**38%**
Inner North	BROWN HILL	1	3	25%				1	25%
	CARDIGAN	59	105	36%	5	29	15%	64	32%
	INVERMAY				59	201	23%	59	23%
	MITCHELL PARK				35	25	58%	35	58%
	MOUNT ROWAN				4	47	8%	4	8%
	NERRINA				23	22	51%	23	51%
	SMYTHES CREEK	3	41	7%				3	7%
	WARRENHEIP	3	16	16%	124	137	48%	127	45%
	TOTAL	**66**	**165**	**29%**	**250**	**461**	**35%**	**316**	**34%**
North	CRESWICK				3	9	25%	3	25%
	TOTAL				**3**	**9**	**25%**	**3**	**25%**
South	BONSHAW	10	23	30%				10	30%
	BUNINYONG				90	190	32%	90	32%
	CANADIAN				3	11	21%	3	21%
	DELACOMBE	5	7	42%				5	42%
	DURHAM LEAD				50	59	46%	50	46%
	MAGPIE				69	112	38%	69	38%
	MOUNT CLEAR		1	0%	13	22	37%	13	36%
	MOUNT HELEN				38	163	19%	38	19%
	SCOTCHMANS LEAD				37	26	59%	37	59%
	SEBASTOPOL				3	5	38%	3	38%
	TOTAL	**15**	**31**	**33%**	**303**	**588**	**34%**	**318**	**34%**
Ballarat LGA		**81**	**196**	**29%**	**561**	**1,066**	**34%**	**642**	**34%**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development, 2009

TABLE 8.11

Table 8.11(a): Estimated and Projected Number of Households, 2006 to 2026

SLA Name	2006	2011	2016	2021	2026
Ballarat (C) - Central	15,859	16,424	17,352	18,273	18,991
Ballarat (C) - Inner North	11,496	13,305	15,119	17,001	18,875
Ballarat (C) - North	410	452	490	520	542
Ballarat (C) - South	9,204	10,477	11,791	13,130	14,436
Ballarat LGA	**36,970**	**40,657**	**44,752**	**48,924**	**52,844**

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Table 8.11(b): Estimated and Projected Average Annual Change in the Number of Households, 2006 to 2026

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
Ballarat (C) - Central	113	186	184	144
Ballarat (C) - Inner North	362	363	376	375
Ballarat (C) - North	8	7	6	4
Ballarat (C) - South	255	263	268	261
Ballarat LGA	**738**	**819**	**834**	**784**

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Table 8.11(c): Estimated and Projected Average Annual Percentage Change in the Number of Households, 2006 to 2026

SLA Name	2006 to 2011	2011 to 2016	2016 to 2021	2021 to 2026
Ballarat (C) - Central	0.7%	1.1%	1.0%	0.8%
Ballarat (C) - Inner North	3.0%	2.6%	2.4%	2.1%
Ballarat (C) - North	2.0%	1.6%	1.2%	0.8%
Ballarat (C) - South	2.6%	2.4%	2.2%	1.9%
Ballarat LGA	**1.9%**	**1.9%**	**1.8%**	**1.6%**

Source: Department of Planning and Community Development, 2009; Victoria in Future 2008

Locations of Suburbs and Statistical Local Areas – Ballarat

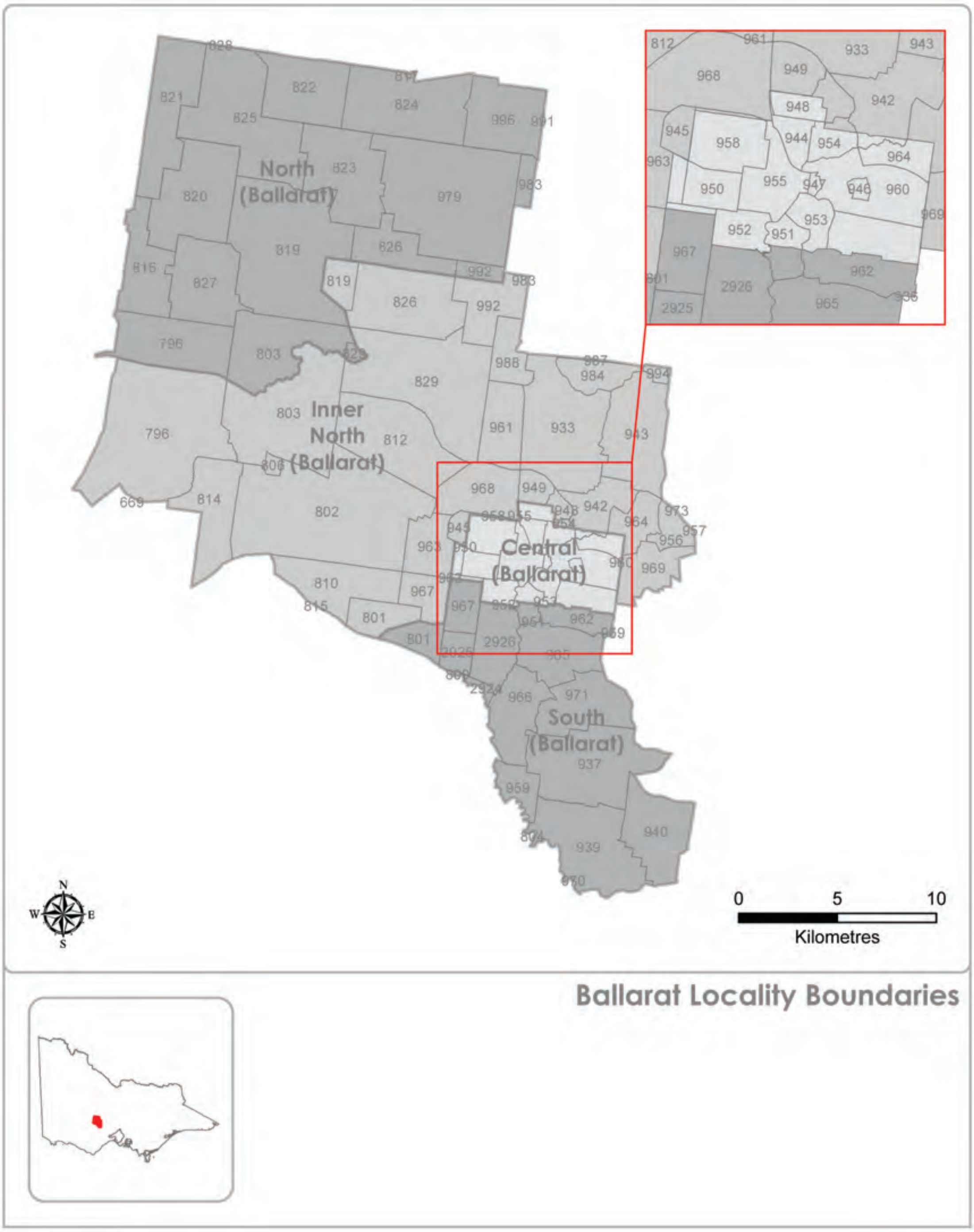


TABLE 8.12

Table 8.12: List of Suburbs by SLA

SLA	SUBURB	REF #
Ballarat (C) - Central	ALFREDTON	963
	BAKERY HILL	947
	BALLARAT CENTRAL	955
	BALLARAT EAST	960
	BALLARAT NORTH	948
	BLACK HILL	954
	BROWN HILL	964
	CANADIAN	962
	DELACOMBE	967
	EUREKA	946
	GOLDEN POINT (BALLARAT)	953
	LAKE GARDENS	945
	LAKE WENDOUREE	958
	MOUNT PLEASANT	951
	NERRINA	942
	NEWINGTON	950
	REDAN	952
	SEBASTOPOL	2,926
	SOLDIERS HILL	944
	WARRENHEIP	969
	WENDOUREE	968
Ballarat (C) - South	ALFREDTON	963
	BONSHAW	2,925
	BUNINYONG	937
	CAMBRIAN HILL	2,924
	CANADIAN	962
	DELACOMBE	967
	DURHAM LEAD	939
	GARIBALDI	970
	GOLDEN POINT (BALLARAT)	953
	MAGPIE	966
	MOUNT CLEAR	965
	MOUNT HELEN	971
	MOUNT PLEASANT	951
	NAPOLEONS	804
	NAVIGATORS	936
	REDAN	952
	ROSS CREEK	800
	SCOTCHMANS LEAD	959
	SCOTSBURN	940
	SEBASTOPOL	2,926
	SMYTHES CREEK	801
	WARRENHEIP	969

SLA	SUBURB	REF #
Ballarat (C) - Inner North	ALFREDTON	963
	BALD HILLS	992
	BALLARAT CENTRAL	955
	BALLARAT EAST	960
	BALLARAT NORTH	948
	BLACK HILL	954
	BLOWHARD	826
	BO PEEP	814
	BROWN HILL	964
	BUNKERS HILL	810
	BURRUMBEET	796
	CABBAGE TREE	987
	CARDIGAN	802
	CARDIGAN VILLAGE	806
	CARNGHAM	669
	CHAPEL FLAT	984
	CRESWICK	983
	DELACOMBE	967
	GLEN PARK	943
	GONG GONG	956
	HADDON	815
	INVERMAY	933
	INVERMAY PARK	949
	LAKE GARDENS	945
	LAKE WENDOUREE	958
	LEARMONTH	819
	LEIGH CREEK	957
	MINERS REST	829
	MITCHELL PARK	812
	MOUNT ROWAN	961
	NERRINA	942
	NEWINGTON	950
	POOTILLA	973
	SMYTHES CREEK	801
	SOLDIERS HILL	944
	SULKY	988
	WARRENHEIP	969
	WATTLE FLAT	994
	WENDOUREE	968
	WINDERMERE	803

TABLE 8.12

SLA	SUBURB	REF #
Ballarat (C) - North	ADDINGTON	820
	ASCOT (BALLARAT)	979
	BALD HILLS	992
	BLOWHARD	826
	BURRUMBEET	796
	CLUNES	817
	COGHILLS CREEK	823
	CRESWICK	983
	CRESWICK NORTH	991
	ERCILDOUNE	816
	GLENDARUEL	822
	GLENDONNELL	996
	LEARMONTH	819
	MINERS REST	829
	MOUNT BECKWORTH	828
	MOUNT BOLTON	825
	TOURELLO	824
	WAUBRA	821
	WEATHERBOARD	827
	WINDERMERE	803

Glossary of terms

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

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

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

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

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

High density
For the purposes of UDP reporting, redevelopment projects that are four storeys or greater are considered high density.

Local Government Area (LGA)
A geographical area that is administered by a local council. Victoria has 79 LGAs.

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

Lot density (broadhectare land)
Number of potential lots associated to land parcels. Net density excludes non-residential land uses except local roads and local open space, while gross lot density includes other land uses.

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

Major infill
Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha.

Major redevelopment sites
Sites predominantly in existing urban areas that are proposed to be converted or redeveloped for residential purposes and that will yield 10 or more dwellings.

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

Medium density
For the purposes of UDP reporting, redevelopment projects consisting of attached one, two and three-storey dwellings are considered medium density.

Minor infill
Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less from 1,000sqm to 1ha.

Precinct Structure Plans
In the Urban Growth Zone (UGZ), the precinct structure plan (PSP) is the key document that triggers the conversion of non-urban land into urban land. A precinct structure plan is a long-term strategic plan that describes how a precinct or a series of sites will be developed.

Statistical Local Area (SLA)
A geographical area created by the Australian Bureau of Statistics for statistical purposes. Victoria is divided into 200 SLAs. SLAs may be the same as an LGA or in most cases several SLAs aggregate to form LGAs.

Vacant Lots
Existing residential vacant lots, sized less than 1,000sqm. A vacant lot is defined as no existing habitable dwelling or 'significant' existing use such as a playground or park.

Acknowledgements

This Urban Development Program report would not have been possible with the assistance and contribution of Spatial Economics Pty Ltd, the Ballarat City Council and Regional Development Victoria.

The Department of Planning and Community Development would like to thank the representatives from these organisations for their valuable contributions.