



Southern Tasmania Regional Land Use Strategy

Background Report No.14: Providing for Housing Needs

April 2011



This document is detailed supporting information for the Regional Land Use Strategy for Southern Tasmania.

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1. Introduction

1.1 Planning for Housing Needs

Access to adequate housing is a basic human right.¹ Ensuring housing affordability, adequacy and appropriateness is fundamental to supporting the quality of life of a population. Housing needs are met when the housing supply (including dwelling type, quality, tenure, cost, and location) aligns with the actual requirements of the households of a region, rather than the perceived demand. Given the inherent diversities in individual and household circumstance, a range of housing options are required to successfully meet the housing needs of a population. With current demographic, economic and environmental trends, there is recognition that a 'one size fits all approach' to housing is unfeasible. In planning for the future housing needs of our region, we must look further than the 'Great Australian Dream' of a single detached dwelling on a quarter acre suburban block.

Changing demographic, economic and environmental conditions mean that Southern Tasmania (the region) is faced with a number of challenges in providing for the future housing needs of its population. A significantly ageing population, decreasing household size, land supply, the need for environmental sustainability, and the rising real costs of housing in relation to affordability are driving the need for greater diversity in the region's housing stock. To adequately provide for these changing needs, future residential development needs to be guided by a greater understanding of the drivers of housing demand and the capacity of our region to provide for this demand.

As housing is a dominant use of land in the region, residential development is a significant land use planning issue. In addition to the social aspects in providing for housing needs, residential development is also a key element in:

- The extent and pattern of urban development;
- Travel behaviour and the demands upon the transport system;
- The location and capacity of physical and social infrastructure; and
- Environmental sustainability.

This background report provides the information and analysis supporting the residential policies and specific 'Settlement Strategies' in the Regional Land Use Strategy, recognising that housing is a significant land use component of settlements.

¹ See Article 11 (1) of the United Nations International Covenant on Economic, Social and Cultural Rights.

2. Understanding the Housing Market

2.1 What is the Housing Market?

Residential land use occurs in the context of supply and demand forces within the Housing Market.

Demand for housing arises from a number of interrelated factors:

- Population growth
- Demographic change
- Economic circumstances of households;
- Investor demand;
- Consumer preferences; and
- Rental prices and availability.

Supply of housing is determined through an equally complex set of factors:

- The number of existing dwellings;
- The rate of construction of new dwellings;
- Construction costs;
- Infrastructure costs;
- Land availability; and
- Land release and development processes.

These factors influencing supply and demand of housing, its affordability and their complex inter-relationship have been conceptualised by the National Housing Supply Council² in their annual State of Supply report and is shown in Figure 1 below.

As with all markets the price (of housing) will be determined on the equilibrium between supply and demand forces. This in turn influences housing affordability, although the price of housing as indicated in Figure 1 is not the only factor influencing affordability.

2.2 Demand

Demand for housing may be analysed on the basis of two types: underlying demand and effective demand. Underlying demand is the 'need' for housing based on the number of households (family units, other groups and individuals) in the population. Underlying demand is primarily driven by migration and demographic factors. An increase in the number of households implies the need for an equivalent number of dwelling completions, although dwelling completions may need to be slightly higher to account for demolitions or inhabitable conditions (National Housing Supply Council 2008: 12).

² The National Housing Supply Council is an independent body established under the COAG Reform Agenda. They report annually to the Commonwealth Minister for Housing .

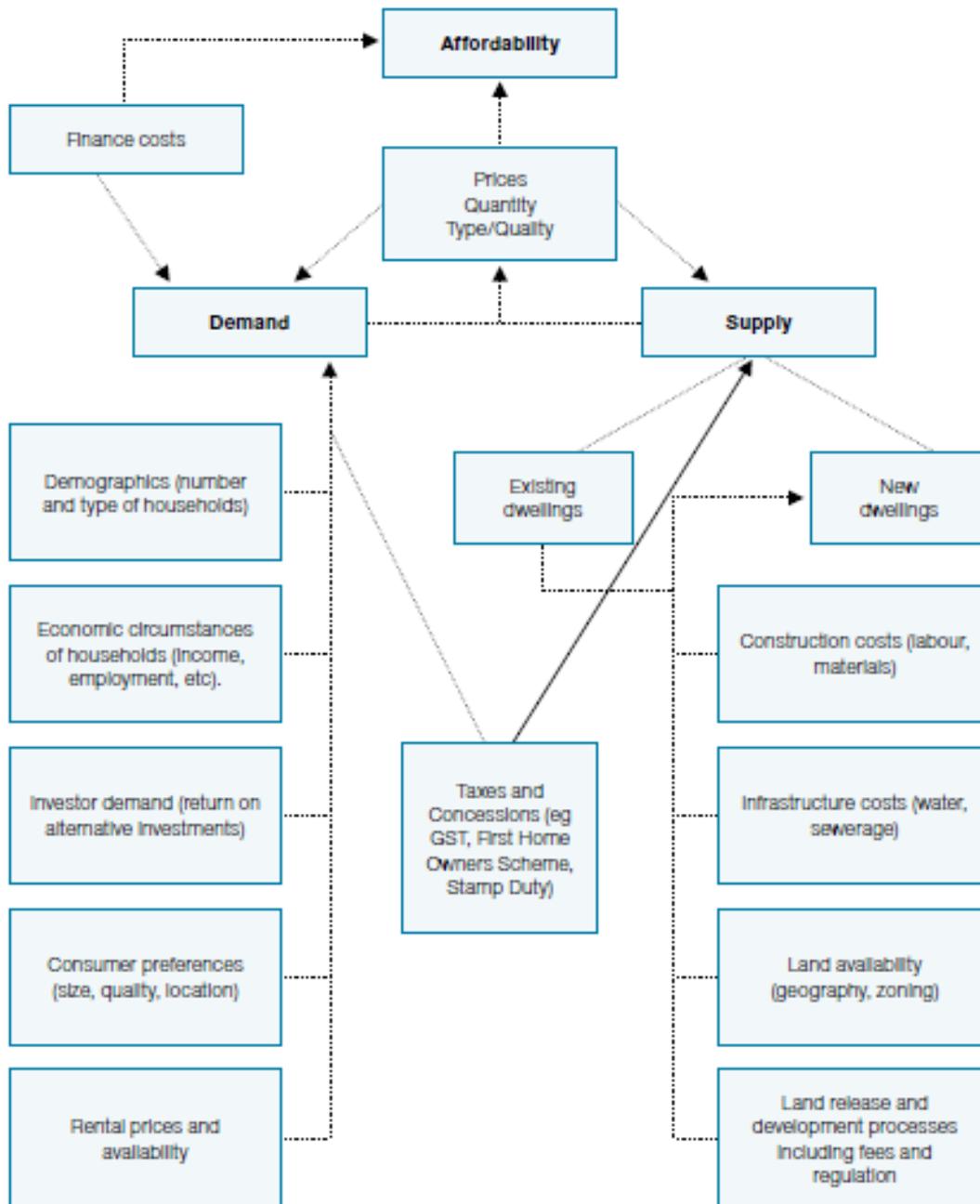


Figure 1: Factors Influencing Housing Supply, Demand and Affordability (Source: National Housing Supply Council 2008).

Effective demand identifies the number, size, type and location of dwellings that owner-occupiers and investors are willing to buy in the housing market. It is affected by the full range of market forces as illustrated in Figure 1 (National Housing Supply Council 2008: 13). Changes in employment levels, interest rates, asset valuations and returns, access to credit and government assistance to first home buyers have altered the level and pattern of effective demand (National Housing Supply Council 2010: 15).

Underlying demand is utilised in strategic land use planning to identify the amount of residential land (and therefore the program of land release) required into the future. As discussed above, land availability is an important element in supply. Household projections prepared by the Australian Bureau of Statistics is one of the most reliable sources to project underlying demand, although as with all projections, they become less reliable the longer the time frame due to uncertainties associated with migration, family conditions and so forth. Hence there is a need to consistently monitor and review.

Several of the influences on underlying housing demand have changed over time and are likely to continue to change. Examples are:

- changing overseas and interstate migration levels, with settlement patterns often linked to employment opportunities and preferred retirement locations;
- regional differences in housing opportunities, along with mismatches between housing location and labour markets;
- delays in household formation linked to, among other things, changes in the duration of education and higher house prices; and
- people living longer, with a marked increase in the number of people aged 65 years and over (National Housing Supply Council 2010: 15).

Effective demand is more difficult to predict because of the international economic and financial conditions within which the Australian economy operates. For example the recent global financial crisis has strongly influenced a householder's capacity to pay for financing.

Since the early 1990s effective demand has been a considerable factor in the long term rise of housing prices due to five key factors:

- A long period of growth in incomes and employment with declining unemployment;
- A sizeable fall in interest rates, relative to the 1970s and 1980s, as low inflation was established;
- Increased access to credit due to financial deregulation and innovation;
- The desire by existing households to move up to higher quality and better located housing as their capacity to pay improves; and
- Various fiscal measures implemented by government to assist first home buyers and contribute to the households' capacity to pay for housing (National Housing Supply Council 2008: 24).

2.3 Supply

Housing supply is simply the combination of the number of existing dwellings with the number of new dwelling constructed and completed. As outlined in Figure 1 the factors influencing housing supply are more complex than a simple demand and supply relationship.

As outlined by the National Housing Supply Council (2008: 47-48):

A market response to current or projected supply shortages will depend upon the ability of the construction industry and developers to provide appropriate dwellings at accessible prices, by converting raw land into serviced lots or accessing infill opportunities.

It is unlikely that land will be developed and housing built if the cost of that development exceeds the revenue that can be generated from it. The price that people are prepared to pay for new housing will also depend partly on its location in relation to jobs, transport and community services.

Generally, surges in housing demand will push up prices in the short run, but the extent to which affordability problems persist depends on how well the supply of housing can respond over time. As the Productivity Commission has observed 'even in a best-practice supply chain, it can take several years to bring new land on-stream, to provide the associated infrastructure and to construct new dwellings'.

Further obstacles to industry responsiveness in the short to medium term may include: labour shortages, shortages in, and/or high prices for, building materials; strategic and statutory planning processes; developer contributions; other taxes and charges, and lack of knowledge of – or confidence in – consumer preferences.

The cost of, and access to, finance for housing development will also impact on housing supply. Recent moves to tighten credit availability for developers may, for a while, result in developments being reduced in scope and staged over longer periods.

Future supply can be calculated by utilising trends in growth of aggregate housing supply (using ABS dwelling approvals and completion data) or information on the residential land and dwelling supply in the planning pipeline.

2.4 Affordability

The Productivity Commission's 2004 report into housing affordability identified that extreme escalation of housing costs in Australia over the past decade has made housing affordability a key policy issue. Housing is generally considered affordable, if housing costs are less than 30% of a household's gross income. If housing costs exceed 30%, households are considered to be under housing stress. While, the reality is often that affordability varies according to the individual circumstances of the household (i.e. their other financial commitments), with average housing costs having more than doubled in nominal terms and incomes not keeping pace, affordability has become a major issue for many low to moderate income earners³

With the average cost of a house having more than doubled in nominal terms, and incomes not having kept pace, affordability has become a major issue in providing for housing needs. Home ownership is now out of reach of increasing numbers of lower income households. With the shortage in the private rental market (which has increased rental prices) many households are forced onto waiting list for public housing. However public housing systems across all States are under stress and suffer from lack of investment (Jacob et al 2010).

The benefits to the broader community, residents and developers of government programs to provide affordable housing that is well developed and managed (built to the same construction standard as other

³ Households receiving less than 50% of the gross medium income are said to be in receipt of very low incomes. Those receiving between 50% and 80% of median income are categorised as low income earners, with households on 80% to 120% categorised as moderate income earners.

housing and integrated with the design and urban form of existing communities) are well documented (Centre for Affordable Housing 2010):

The community benefits from affordable housing because it contributes to sustainable and dynamic local communities, by:

- *providing housing for a diverse local workforce*
- *providing direct economic benefits to the local community, including increased demand for goods and services which in turn provides increased local employment opportunities*
- *accommodating people with the different skills required to support communities, such as shop assistants, bus drivers, construction workers, cleaners, nurses and teachers*
- *meeting the needs of the growing number of smaller households living in high-cost areas*
- *promoting economic and social integration – ensuring that families' housing costs are not so high that they can't afford to meet education and health costs and that there is sufficient security of tenure to improve their capacity to obtain and maintain employment.*

Residents of affordable housing benefit because it provides housing that:

- *is more affordable than that already available in the private market, thus still allowing adequate income for essential expenses such as food, clothing, health and education*
- *integrates with the community*
- *provides a way for people to remain in areas in which they have lived for a long time, and to live close to their support networks, during changes in life circumstances such as divorce, retirement, or recovery from a long-term illness or injury.*

Developers of affordable housing benefit because:

- *some local policies to promote affordable housing offer significant financial incentives for developers – for example, through the provision of density bonuses*
- *well located affordable housing provides housing close to employment centres, which supports a strong labour force and a vibrant economy*
- *there are often attractive returns to be made, especially from mixed developments or joint ventures*

2.5 The planning and construction pipeline

As discussed in Section 2.3, there can be considerable delay in the supply chain. Understanding the basic planning and construction pipeline is critical to identifying where delays can be minimised. In their 2008 State of Supply Report, the National Housing Supply Council identified a six stage generic planning and construction pipeline for Greenfield and major brownfield housing development⁴

⁴ The planning and construction pipeline is different for smaller scale infill development as usually land has already been identified and zoned for residential purposes and has access to existing infrastructure.

Table 1: Six stage generic development pipeline for greenfield development and major brownfield redevelopment. (Source: National Housing Supply Council 2008)

Stage	Time elapsed	Description	Regional Commentary
1. Strategic identification and designation of new land release areas	2-4 years	The designation by a state or territory planning agency that a parcel of land or an area may have urban development potential is generally by inclusion in an urban growth boundary (Victoria and South Australia) or may be by some other form of designation, such as identification of master planned area in Queensland or urban zoning under a region scheme in Western Australia. This stage may also include preparation of a broad strategic plan for the land. The strategic identification stage is generally initiated by a proponent, but may also be initiated by the state planning agency or local government. Time frames vary widely but can take from two to four years.	There is currently no strategic identification and designation of new land release areas either within the Southern Tasmania region or the State. Indeed there is no supply and demand monitoring at all. The result not only creates greater uncertainty in Stage 2 as to the likely outcome of rezoning requests but potential for the planning system to create effects on the market that are not intended.
2. Gazettal of rezoning/material change of use	1-3 years	The rezoning and/or material change of use process is common to most States. Rezoning under local government planning instruments is generally initiated by the proponent. While there may be some expectation of time frame compression of the rezoning process once the land has been identified at Stage 1, rezoning usually takes between one and three years depending on scale and complexity.	The establishment of an Urban Growth Boundary and a strategic framework for decision makers considering rezoning requests within the Boundary, will provide a greater level of certainty and, therefore, generally shorter decisions timeframes.
3. Negotiation of infrastructure levies and detailed structure planning	1-3 years	The preparation of a development plan or structure plan comprises more detailed site planning for the land and may include determination of development contributions. In some states, detailed site planning may be a prerequisite for zoning. In most cases, the landowner/developer undertakes the development/ structure planning process with a view to obtaining the necessary approvals from the relevant local government agency. The involvement of a number of State government departments and agencies that are responsible for hard infrastructure (such as roads, water, electricity, sewer	A requirement for a structure plan to support requests for rezoning, (within the Urban Growth Boundary), would provide a mechanism through which major infrastructure considerations and linkages to surround land and transport networks can be resolved.

		and public transport) as well as soft infrastructure (such as schools and health facilities) may have a significant role in determining if, and how quickly, applications proceed.	
4. Statutory subdivision and development approval	6 months to 2 years	In most states and territories, the issue of statutory development/subdivision approvals is the responsibility of the relevant local authority, which responds to developer-initiated applications generally on a stage-by-stage basis. These approvals usually relate to road layouts, lot sizes and dimensions and sometimes streetscapes and house designs where integrated housing projects are being developed. This stage may take from six months to two years.	The statutory approvals process would benefit, and be hastened by, the existence of a comprehensive land use strategy. Essentially, this would provide ready answers to a range of issues that otherwise need to be answered on a case-by-case basis by applicants.
5. Major civil works, servicing of allotments and issue of new titles	1-2 years	This stage usually commences with the commissioning of engineering designs for the civil construction of the subdivision and the provision of services. The completion and certification of the construction works by approval agencies is usually a condition precedent to the issue of titles to the new residential lots. In general, subdivisions are constructed in stages of around 50 lots and development of a large subdivision may occur over a number of years. Construction is undertaken by the landowner/developer, while state servicing agencies (for example, in relation to water, power, sewerage, roads) may have a major role in the certification process. The design, construction, certification and titling processes may take in aggregate from one to two years.	This stage is usually completed outside of the planning system but still through Local Councils which enable the checking of compliance with conditions of approval.
6. Development approvals and dwelling construction	9-12 months	This stage covers housing design, approval and construction. This may be undertaken by a lot purchaser or by a developer/builder who intends to offer a house and land package. Most local authorities require development approval for detached housing to deal with setbacks, overlooking, privacy and parking issues. Overall time frames vary widely from as little as nine months to twelve months.	One benefit of strategic land use planning is that it should provide a clearer understanding of what new development is appropriate where. Planning schemes can then be arranged to facilitate desirable development, thereby reducing development approvals times.
Total Elapsed Period	6.25 to 14.5 years		

2.6 The role of the planning system

In better understanding the housing market, it becomes clear that the planning system has well defined role in providing for an efficient housing market that meets the needs of the community, while ensuring broader issues of sustainability, protection of identified values and avoidance of risks and hazards are addressed. It is also clear that, given the range of influencing factors on the supply and demand equilibrium within the housing market, the planning system alone cannot assure a supply of housing that addresses affordability issues.

As outlined by the National Housing Supply Council (2010: 52) 'an effective planning system provides a framework for coordinating the essential shared services needed to support new development. It facilitates positive externalities such as economies of scale in infrastructure provision, and the provision of public goods such as open space and community infrastructure...the planning process also plays a role in ensuring consultation with affected parties with a view to balancing competing interests equitably'.

The National Housing Supply Council has also expressed the view that planning should be much more about strategic direction, coordination of infrastructure and setting the rules for administrative processes (i.e. approvals), rather than just about the assessment of individual development proposals: an aspiration that we are yet to achieve in the Tasmanian planning system.

The key objective in planning reform should be to undertake higher quality planning (strategic, concept and master planning)...once broad planning principles, frameworks and assessment criteria are in place, there should be greater certainty for developers and less scope for contesting the assessment of individual development proposals. This could be expected to result in far fewer opportunities for delay and uncertainty associated with referral to higher authorities and third-party appeals.

Some streamlining of development assessment processes could be implemented quickly, but this would be particularly contentious if public engagement on strategic and concept plans had not already taken place.

In this way the detrimental effects that the planning system can have on the housing market, through unintentionally constraining the supply or creating delays and uncertainty in the supply chain causing unnecessary additional costs (which in turn are passed onto the consumer) can be avoided.

It is also recognised that a consistent and standard system is necessary. Unclear policies and variation in planning standards or procedures between jurisdictions can lead to developers avoiding certain local government areas, reducing development activity, postponing land acquisition, or targeting higher market segments at the expense of the affordable housing supply (National Housing Supply Council 2010:54).

A well-established, resourced and focussed planning system regulates:

- the types of land and locations that may be used for housing development
- the amount or density of housing that may be developed
- the configuration and design of this housing
- the sequencing of development
- the types of services to support development (from utilities to parks to community centres)
- some charges for infrastructure.

2.7 The Greenfield to Infill Balance

Australia is an urbanised nation, with 75% of our population living in cities of more than 100,000 (Infrastructure Australia 2010). With increasing land consumption for residential purposes and the associated loss of productive land & environmental values, significant infrastructure and climate change challenges lie ahead. Recognising that we need to make more efficient use of our existing settled footprint, the balance between the percentage of greenfield to infill development is at the heart of many regional or metropolitan strategies across Australia.

Greenfield development involves the conversion of rural land or natural landscapes on the urban fringe into residential development, usually through large multi-staged subdivisions. Residential development in greenfield areas tends to be in the form of detached dwellings set on their own allotments at densities that have their historical roots in the traditional '¼ acre block'.

Infill development, on the other hand, involves increasing residential densities through medium and high-density residential development in existing urban areas. It can occur at a range of scales including:

- Small scale subdivision or unit development on existing residential lots.
- Redevelopment of existing and/or underutilised larger buildings and sites, sometimes in mixed-use areas (greyfields) and
- Development of vacant urban sites, including brownfield sites.

There are a number of benefits associated with increased residential densities achieved through greater infill development, including:

- More efficient use of physical and transport infrastructure;
- Reduced vulnerability to increases in petrol costs and peak oil;
- Reduced ecological footprint of urban development and reduction in loss of biodiversity
- Increased opportunities for social interaction and reduction in social segregation;
- A greater proportion of the population living in proximity to services and employment opportunities;
- Increased economic viability of public transport, and subsequent extension thereof;
- Better utilisation and revitalisation of other public infrastructure, including parks and open spaces;
- Provision of a greater range of housing options to suit the decreasing size of households;
- Promotion of health and wellbeing by eliminating distance as a barrier to walking and cycling as preferred modes of transport;
- Improved amenity; and
- Maximising agglomeration potential of inner cities through intensification of land use.

In the majority of capital cities across Australia, target levels are being set for increasing infill development in existing urban areas. Metropolitan plans in Melbourne, Perth and South-East Queensland include targets for the proportion of new housing to be provided through infill development of between 50% and 70%. In addition to the above 'common good' benefits, these targets are also a policy response to market forces, with projected increased demand for attached and medium density housing over the next 20 years.

Table 2: Infill targets for major Australian cities (Source: National Housing Supply Council 2010)

City	Strategic planning document	Time-frame	Target dwellings (number)	Percentage from infill (%)
Sydney	City of Cities: A Plan for Sydney's Future	2005 - 2031	640,000	60 to 70
Melbourne	Melbourne 2030: A Planning Update - Melbourne @ 5 million	2009 - 2030	600,000	53
South-east Queensland	South East Queensland (SEQ) Regional Plan	2009 - 2031	754,000	50
Perth	Directions 2031 Spatial Framework for Perth and Peel	2009 - 2031	328,000	55
Adelaide	The 30-Year Plan for Greater Adelaide	2010 - 2040	258,000	Moving from 50 to 70

For the provision of public housing it is also advantageous to strike a balance between infill and greenfield development to ensure issues of social equity are adequately addressed. Success is being achieved where public housing opportunities are sought in small clusters within established residential areas in reasonable proximity to services such as public transport, community facilities and services, shops and employment centres. Urban renewal projects within existing broadacre sites, such as the Bridgewater Urban Renewal Project (B.U.R.P), which has been striving 'to improve the economic, social and physical environments of the area once described as having Australia's lowest level of wellbeing', have also been achieving great success (Downie 2001). Initiatives such as the B.U.R.P have recognised the importance of incorporating public housing into existing suburbs and reducing the density of public housing in certain areas. Balancing infill and greenfield development when considering public housing will also continue to progress these aims.

There are, however, barriers to achieving infill development which need to be overcome. Of most significance is that infill dwelling costs exceed those of greenfield development across Australia (with the exception of Sydney) (Urbis 2010). The result is that, in those areas where greenfield development has been heavily curtailed without appropriate market based incentives to achieve infill targets, average housing prices have increased - affecting the affordability of the market.

Without active intervention in the housing market through such mechanisms as regulation, infrastructure and economic incentives/disincentives, the market will tend to predominantly meet housing demand through supply in greenfield areas. This will continue until such time that the negatives of residing large distances from employment and services (including the travel times, community interaction etc.) outweigh the costs saved through cheaper housing. This is clearly evident in Greater Hobart where nearly 85% of all new dwellings are provided through greenfield development. Clearly, the anticipated future large rises in the cost of fuel for transport will have a substantial impact on this equation.

The Federal Department of Families, Housing, Community Services and Indigenous Affairs in their National Dwelling Costs Study (Urbis 2010) found the cost of housing is based upon 14 key cost components (Table 3). In analysing these different cost component across the five major cities of Sydney, Melbourne, Brisbane, Perth & Adelaide it can be concluded that reducing the market barriers to the take-up of infill development opportunities can:

- Increase supply of infill land through planning legislation that makes infill development relatively easy (as compared to the pipeline time and costs for greenfield development – see Table 1); and
- Reduce the development timeframe through accelerated planning processes for infill development (as this reduces the direct impact of development holding cost).

Table 3: Costs components of new dwellings by category (Source: Urbis 2010:9)

Major Category	Component Costs
Land	<ul style="list-style-type: none"> • Land Acquisition
Government Taxes and Charges	<ul style="list-style-type: none"> • Stamp duty on land • Stamp duty on dwelling sale • Local council fees • Infrastructure charges • Council rates/water • Land tax • GST Liability • Transfer fee on sale
Professional Fees	<ul style="list-style-type: none"> • Professional fees during development • Professional fees on sale
Construction	<ul style="list-style-type: none"> • Land preparation • Dwelling construction costs
Development Costs and Interests	<ul style="list-style-type: none"> • Development management • Marketing • Sale Costs • Interest on land and purchase costs • Interest on construction
Development Profit	<ul style="list-style-type: none"> • Developer profit

3. The Housing Market in Southern Tasmania

3.1 Regional Demand Projections

As indicated in Section 2.2, underlying demand forms the basis of demand projections for strategic planning purposes. Utilising population and household projections prepared by the Australian Bureau of Statistics under the medium growth scenario and taking into account dwelling approval trends outlined in Tables 25 & 26 of Background Report No. 2, the following dwelling demand forecasts to 2032 form the basis of the policy developed under the Regional Land Use Strategy (the Strategy):

Southern Tasmania region: 36,000 new dwellings

Greater Hobart: 26,500 new dwellings

3.1.1 Consumer & Locational Preference

Analysis of the statistical data in the Regional Profile (Background Report No. 2) and on ground evidence indicate various trends and projections in respect to consumer and locational preference that will have relevance in meeting the future demand for housing.

Changing Household Structures and Sizes

Over the past few decades, there have been significant changes in the age profile of Southern Tasmania. The region's population is ageing rapidly (recognised nationally), due in large part to low fertility levels and increasing life expectancy. The ageing population is further contributed to by:

- the tendency for young adults (within the 20-34 year age group) to depart to mainland centres for greater employment and educational opportunities;
- low net migration rates with a high percentage of those people that do migrate to the region being in the older age groups.

The structural ageing of a population raises particular issues for determining future housing needs. Ensuring access to appropriate health services and aged care will be key considerations. Dwelling size and type will be influenced by factors associated with changing levels of physical and economic dependence and personal circumstances. The Australian Housing Survey conducted by the ABS in 1999, identified that older persons (65+ years) living in a couple only household were more likely to live in separate dwellings than households containing a single older person (87% compared to 65%).

In addition to the effect of ageing, it is also recognised that changing family structures (increasing numbers of single parent households or couples with no children) are also contributing to decreasing household size within the region.

At present the housing stock within the region is dominated by single detached dwellings, with building approval trends showing continued dominance of single detached dwellings with increasing floor areas for new dwellings. Indeed, at the 2006 census, 82.6% of all dwellings in Greater Hobart (where there should be greater expectation of a diversity of housing types) were separate, detached dwellings. Within Australia's 17 major cities (major cities being those which contain over 100,000 people), Greater Hobart has the 5th largest proportion of single detached houses, and the highest proportion of all capital cities (Infrastructure Australia 2010).

For older couples and singles, and some single parent or couples with no children families, smaller detached, semi detached dwellings and units/flats are often housing types, which better suit changing physical, social and economic circumstances. In particular, greater infill development in close proximity to established suburban areas (i.e. in close proximity to the original family home) will allow residents the opportunity to maintain existing social networks whilst providing housing which meets the physical and economic needs of an ageing population. There is also justification for the promotion of growth in ancillary dwellings (i.e. flats or units attached to a house), as this has benefits in terms of affordability, social outcomes (care and support), and reduces pressures on the public system and aged care facilities.

Lifestyle

Whether seeking a change in lifestyle pace and amenity (i.e. the sea change and/or tree change movement), more affordable living costs, or greater access to exceptional natural and cultural assets, there has been identifiable trend towards people seeking housing in new locations which better suit their changing life stages and preferences. Examples of major groups which are driving demand for new dwellings because of lifestyle choices include retirees (55+) who are not yet reliant on the social services and facilities, those of the 'baby boomer' generation transitioning to retirement who remain partly active in the workforce who are seeking a change in lifestyle pace, and younger families who are forced into outer urban and coastal areas because of higher living costs in inner urban areas. Life style choices for a sea change or tree change for baby boomers beginning the transition into retirement is encouraged by many of the outer urban areas of the region still being within commuting distance of the major employment centres, but flexible work arrangements such as 'telecommuting' requiring less frequent travel into these centres due to the ability to work remotely.

A further factor in lifestyle change is the increasing number of interstate migrants entering the region. On a National level, Tasmania has the highest median age of interstate arrivals (31.1 years) and has the third largest net gain of interstate movers in the 65+ age group (following Victoria and Queensland) (ABS 2010). The proportion of these migrants in the mid-older age groups further demonstrates the trend for semi-retirees taking advantage of the capital wealth that they have generated in their working lives and the value of this against a more affordable housing market in Tasmania.

Within the region, the trend of lifestyle choice driving demand for residential growth has been most clearly recognised in the following ways:

- The conversion of 'shacks' into permanent residential homes.
- Increased construction of second dwellings or holiday homes.
- Increased construction of rural residential type dwellings.
- Stabilisation of population in rural towns or villages.

In the absence of a settlement strategy for the region the growth of many of the coastal and rural areas has seen the above development occurring in an ad hoc manner, with some small settlements growing into permanent residential populations in the absence of physical, social and community infrastructure. The movement of affluent 'sea and tree changers' into these outer urban areas also has the potential for social implications, creating a large divide between themselves and the lower income populations forced into these areas because of higher housing costs in inner areas. The growing number of retirees, semi-retirees and holiday makers in these areas also does not contribute to growth and diversification in the employment opportunities available to permanent residents. Employment opportunities tend to remain

focused in the lower income categories of retail, hospitality, tourism and care, many of which are part time and influenced by seasonal variance.

The 'Shack' and Holiday Homes

The demand projections for the region do not include demand for new dwellings for use as holiday homes. Tasmania has a strong 'shack' culture. Long established shack settlements are evident across the region. These are either in coastal areas, often directly adjacent to beach front locations, or scattered throughout the highland lakes district, capturing opportunities for pastimes such as trout fishing.

While the character of many shack settlements within the region has evolved there remain evidence of continuing demand for additional dwellings for holiday purposes. Within the Central Highlands, Glamorgan Spring Bay and Tasman municipal areas the analysis of dwelling approvals against population growth across the last 10 years shows strong dwelling growth that exceeds the demand generated from population growth and demographic change combined. This is supported by strong physical evidence that these construction trends can be attributed to growth in holiday homes. Hotspots for holiday home growth include White Beach, Eaglehawk Neck, Coles Bay (including Swanick), Orford/Spring Beach and the Highland Lakes (see Table 26 under Background Report No. 2). Holiday homes are also evident to a lesser degree in the lower Channel, Bruny Island and lower Huon Estuary areas.

3.2 Current Land Supply

3.2.1 Greater Hobart Dwelling Yield Analysis

As a step towards better understanding the supply of land within the region, the Greater Hobart Dwelling Yield Analysis was undertaken (see Background Report No. 13)⁵. This was an analysis of the capacity of the existing residentially zoned land (all land zoned residential, low density and rural residential) within Greater Hobart⁶. The analysis has considered residential land against four different market segments and a range of different locational characteristics and, while it is a theoretical capacity only, the analysis has utilised a very conservative approach of assuming only one dwelling per lot. Promotion and facilitation of multiple dwellings per lot would result in a significantly higher dwelling yield capacity. The results are outlined in Table 1 below.

⁵Land supply for individual towns outside of Greater Hobart has been done at a local government level, although into the future, ideally supply analysis would be extended across the whole region.

⁶ Zoning is the primary mechanism for releasing residential land in Tasmania.

Table 4: Dwelling Yield Capacity for Greater Hobart

Zoning	Market Segment	Existing Dwellings	Potential Additional Dwellings*	Indicative Year supply**
Low Density Residential				
	Lower	51	247	See note
	Middle lower	893	527	
	Middle top	614	432	
	Top	5	0	
Low Density Residential Total		1563	1206	
Residential				
	Lower	6858	5894	147
	Middle lower	29092	17935	46
	Middle top	25493	5476	16
	Top	13551	1451	17
Residential Total		74994	30756	
Rural Living				
	Lower	187	350	24
	Middle lower	1680	1552	26
	Middle top	2057	148	3
	Top	18	0	0
Rural Living Total		3942	2050	

* assuming one dwelling per lot.

** year supply is based on the annual average dwelling construction trends over the last 10 year period which correlates with ABS population and household data and projections.

N.B: Due to current statistic compilation it is not possible to accurately convert the potential additional dwellings of each of the residential and low density residential zoned categories into year land supply as building approval statistics and trends can only be analysed on a suburb basis and some suburbs contain areas across which both residential zone types exist. The land supply figure for Residential therefore includes Low Density Residential.

3.2.2 Passive Dislocation

If downsizing from the family home, older couples and singles are likely to have greater choice and ability to obtain housing types that better suit their needs (i.e. semi-detached houses/flats and units) in close proximity to services and facilities and their existing social structures. Younger couples, singles or smaller families, who may also be suited to these housing types, can struggle to compete in the housing market because of the mismatch in capital. A common result of this is the dislocation of young families, singles and couples into outer urban areas, where affordability is greater but social disadvantage arising from reduced access to services and facilities and reliance on transport may become an issue. When

providing for the increased demand for smaller dwellings on smaller allotments in close proximity to services and facilities, issues of social equity and locational disadvantage must also be a key consideration to ensure the housing needs of the whole population can be provided for.

3.3 Affordable Housing

Indicators show that housing affordability has been generally decreasing (housing becoming less affordable) in Tasmania with the house price-to-income ratio significantly above its 2002 level of 3.4. After rising to a high of 5.6 in 2004 it dropped only marginally to 5.4 in 2008 (housing becoming marginally more affordable) (see Figure 2).

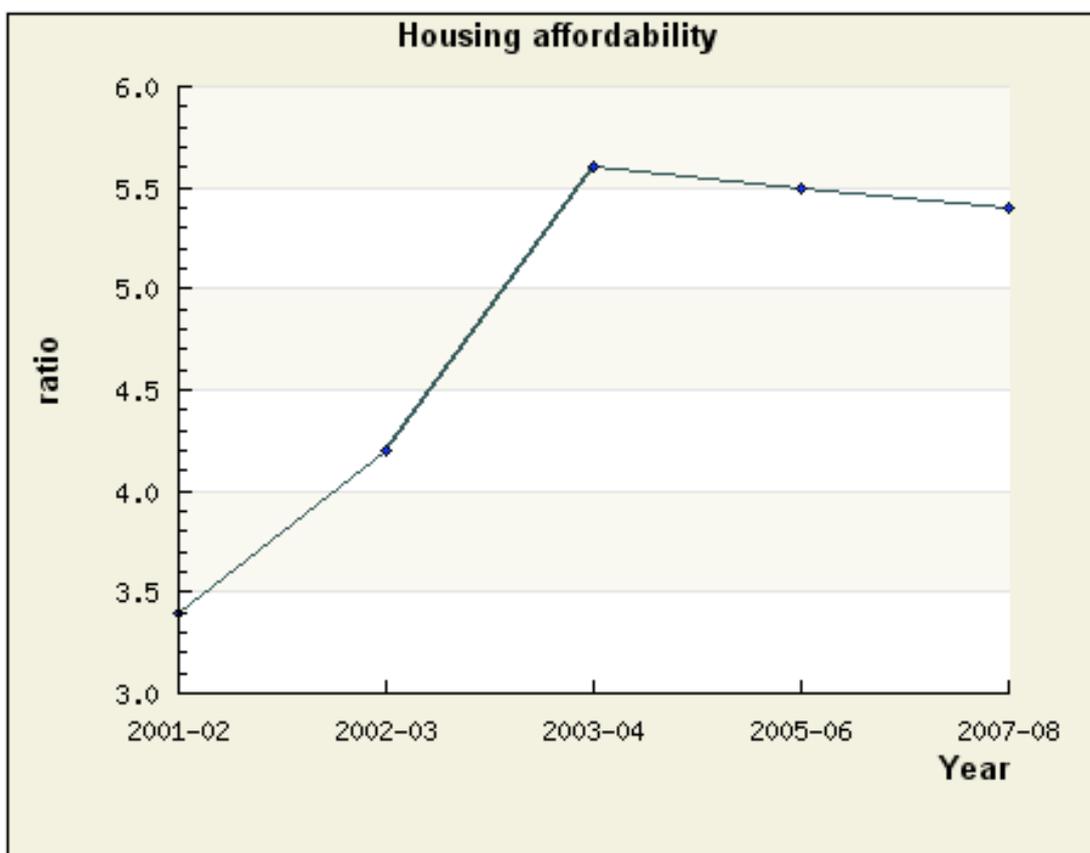


Figure 2: Tasmanian house price to income ratio (Source: *Tasmania Together Indicator 1.1.5*)

Over the last decade's housing boom the proportion of households who fully owned their home in Tasmania declined, and the proportion of households with a mortgage increased. (Adams 2009).

It is estimated that in Tasmania approximately 17 500 low-income households (18 per cent of all low income households) in 2005-06 were in housing stress (i.e. households in the bottom two quintiles of income distribution paying more than 30% of their income on housing). Housing stress was more likely to be experienced by private renters, first home buyers, younger households (15-34 years), lone and group households, and households who arrived in Australia less than ten years ago, than other household types. The situation for low-income private renters has worsened significantly whereby between 2001 and 2008 the proportion of households receiving Commonwealth Rent Assistance in housing stress increased from 22 per cent to 29 per cent.

As well as those in housing stress, there is an increasing number of households who are either under considerable pressure in servicing their mortgages or who have little chance at purchasing or renting in a preferred location (Adams 2009).

Additionally, the number of applicants and waiting times for Housing Tasmania and other providers has been rising whilst the stock of public housing has been falling. This has been partly due to the sale of such properties to tenants, which although in itself is a positive outcome, has not resulted in the proceeds from such sales being used to fund replacement public housing. The proceeds from such sales have been used to support Housing Tasmania's operating budget, which has resulted in public housing becoming a de facto transitional housing system for people in crisis and not the type of housing intended for mostly low income earners. Until such time as funding and public housing stock levels increase, it will continue to be utilised substantially as a stop-gap measure for the most needy, and not as a legitimate long-term option for a section of the community. This changing role has created significant hurdles for the public housing system, and for garnering better acceptance from the wider community.

In 2007-08, 7% of Tasmanian households were in public housing, compared to 5 per cent of Australian households (Adams 2009). However, the stock of public housing has been trending down over the last decade accompanied by a rise in the number of applicants and waiting times, resulting in fewer applicants housed (refer figure below).

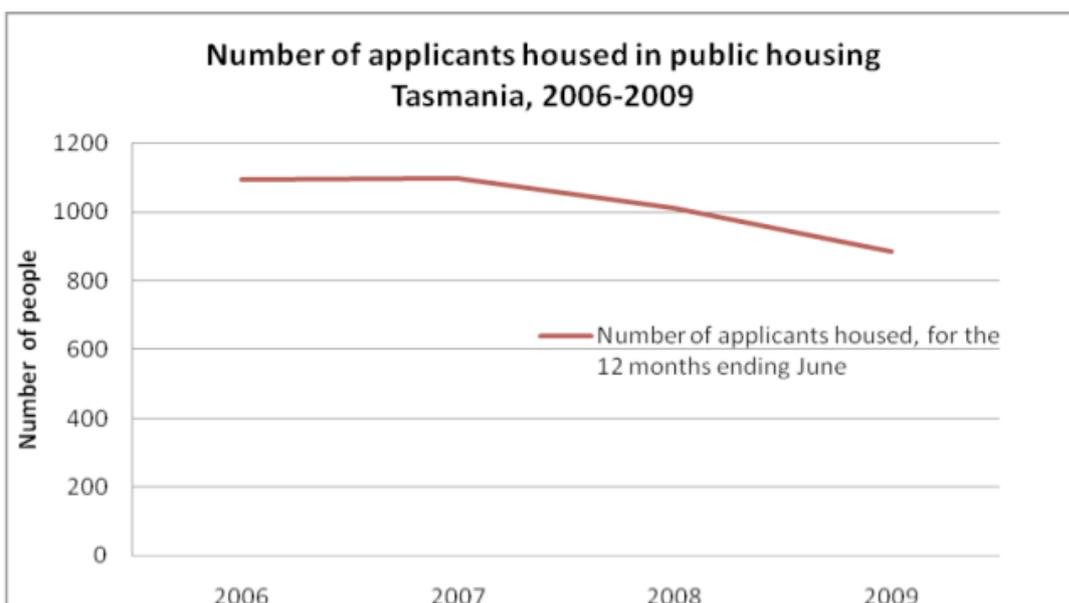


Figure 3: Number of applicants housed in public housing 2006-2009 (Source: DHHS)

Historically, the trend for public housing in Tasmania was to create broad acre public housing estates on the fringe of the metropolitan area remote from many services and employment opportunities. Approximately 35% of public housing stock is still located in large housing estates on the periphery of urban centres, in notable areas such as Bridgewater, Gagebrook and Clarendon Vale (DHHS 2004).

The concentration of highest-need tenants, with a similar socio-economic background, in broad acre public housing estates, has created pockets of exclusion and disadvantage. This has led to a stigmatisation of public housing tenants, and can be socially disadvantageous to both individuals and the whole community. While people in broad acre public housing estates are often under stress from lower levels of educational achievement, higher levels of unemployment, poorer health and higher levels of

social problems, such as family violence (DHHS 2004) it is also important to recognise they do contain very high levels of social capital and a strong sense of community (Flanagan 2010, pp.10 -12).

Tasmania's relative isolation, small economy, highly decentralised population and limited resource base has contributed to Tasmania having a high level of welfare dependency. Tasmania has the highest percentage of households in receipt of pensions or benefits, leading to the lowest median household income of any State or Territory. In Greater Hobart, these socio economic groups have traditionally been concentrated in the large housing estate areas on the edge of the metropolitan area, as indicated in the figure below.

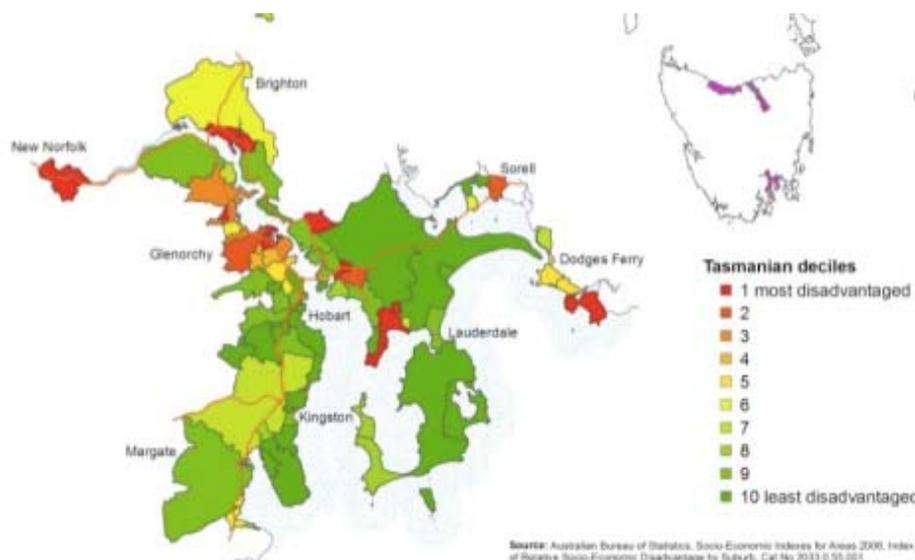


Figure 4: Map of SIEFA Index of Relative Socio-Economic Disadvantage by Suburb, 2006 (Source: Adams 2009 A Social Inclusion Strategy for Tasmania)

Note: regional mapping of the SIEFA index are contained within Background Report No. 2

3.3.1 New Approaches

The provision of public 'affordable' housing is no longer arranged in large broad acre estates. Public housing opportunities are now sought in smaller clusters within established residential areas in reasonable proximity to services, such as public transport, community facilities, medical facilities, local services and shops and centres of employment. Public housing opportunities, in areas closer to services, will greatly reduce the isolation and stigmatisation of previous arrangements. Not only are public housing developments being given a strategic focus but urban design principles are also now a specific consideration in the assessment of public housing developments.

Unfortunately there is sometimes local community resistance, especially in older established suburbs dominated by private ownership, to affordable housing infill developments. A number of State Government initiatives to address some of the affordable and social housing issues have occurred with varying degrees of success.

Tasmanian Affordable Housing Limited (TAHL) was established in late 2006 by the Tasmanian Government and community organisations as a public, unlisted company, with the goal of achieving the

development and leasing of 700 new houses. It was wound up in late 2010 due to a lack of success in achieving its objective.

The principal objective of TAHL was to promote the relief of poverty by providing sustainable, affordable housing in Tasmania. Further objectives were to:

- increase the supply of affordable rental accommodation to assist in alleviating unmet need for affordable housing in Tasmania
- provide affordable housing as rental accommodation to Tasmanians who would otherwise experience housing stress
- respond to the diverse needs of tenants requiring affordable housing
- develop an integrated, coordinated and cooperative approach to the delivery of affordable housing in Tasmania.

In 2008, the State Government also announced it had committed to spend \$60m on affordable housing initiatives including an urban renewal project in the Bridgewater / Gagebrook area to support the Affordable Housing Strategy (see section 2.4 above). It has also established the Affordable Housing Innovations Unit within the Department of Health and Human Services. Model residential provisions are being drafted to remove barriers to affordable housing and to ensure that new housing meets consistent standards and sustainability criteria across the State.

One of the greatest contributions that the planning system can make to the stock of affordable housing is to implement a supply and demand monitoring system and a clear urban growth and land release management program (the first step of which is intended as part of the Strategy). Beyond this other key steps could include:

- Development of a State Policy on Affordable Housing. This is also being considered in order to provide a high level 'head of power' for implementation of provisions for affordable housing through planning schemes;
- Identification of opportunities for public/private development of affordable housing through ongoing regional planning system (resourcing constraints of the current project prevent such detailed consideration at this stage);
- Creating greater accommodation within planning scheme provisions for affordable housing developments within the established inner suburbs close to services.; and
- Improving education within the community regarding rights for affordable and social housing to be treated as any other residential use.

4. Housing Density

4.1.1 The relevance of Housing Density

Housing density directly contributes to how sustainable and cost-efficient the use of land for residential purposes is. Housing density in Australia has its historical roots in the '¼ acre block' and is often perceived as a key element in the amenity of residents.

Increasingly within the region, residential development is occurring at lower densities. An examination of the building approvals data in the Regional Profile (Background Report No. 2) reveals that approximately 15% of all new dwellings within the region over the past 10 years have been at what is considered 'rural living' densities.

Within the urban area of Greater Hobart average densities of new areas is now around 7 to 10 dwellings per hectare (Gross Density), whereas established suburbs were developed at much higher densities of upwards of 15 dwellings per hectare (with some older inner city suburbs within the Hobart Local Government area established at densities of upwards of 20 dwellings a hectare (see density mapping in Background Report No. 8 The Regional Transport System).

Clearly the trend toward expanding residential development at lower densities has been supported by increasing levels of car ownership and improved road transport systems. This dispersment of the population has led to the creation of a car-dependent settlement pattern and significant areas of rural land being converted to what is essentially residential use. Residential development at these lower densities can weaken strategies relating to the protection of the region's productive and natural resources and its capacity to adapt to changing conditions, arising from both climate change and the market.

4.1.2 Housing Density Guidelines

An essential element in a regional approach to housing and settlement is a consistent understanding of the terminology applying housing density. A consistent definition of housing density will combat confusion within the community and development industry over different scales of density. It will also assist to ensure the policy and strategies developed in the Regional Land Use Strategy are achieved by Planning Authorities.

The housing density definitions are based on the following density definitions:

Net Density The number of dwellings per hectare on land devoted solely to residential development. While it includes private driveways and private open space, it does not include public infrastructure such as roads, streets and public open space

Gross Density The number of dwellings per hectare of a given land area, including public infrastructure such as roads, public open space and, in some instances, non-residential development (e.g. schools and local shops).

The following table provides the proposed standardised terminology pertaining to housing density. It should be noted that the terms are relative to Tasmania. For example; the 'High Density' term would not be so used in the major mainland cities where the term would apply to a much greater density of housing.

Table 5: Definitions of Housing Density Terminology in Southern Tasmania

Environmental Living	
Typical Built Form	Detached, predominantly single storey dwellings on very large allotments with very low level or no servicing provided.
Gross Density	Between 0.10 to 0.25 dwellings per hectare
Typical minimum lot size	1 hectare to 8 hectares
Locational Description	Environmental living occurs in bushland settings. Beyond electricity and telecommunications servicing is completely on-site, although there are increasing instances of self-sustaining properties with no infrastructure connections as all. Dwellings are usually exposed to higher levels of bushfire risk which needs to be managed on-site.
Rural Living	
Typical Built Form	Detached, predominantly single storey dwellings on very large allotments with very low level or no servicing provided.
Gross Density	Between 0.25 to 1 dwellings per hectare
Typical minimum lot size	1 hectare to 4 hectares
Locational Description	Rural living is the residential use of land in a predominantly cleared rural setting and can include part time or hobby farming. Beyond electricity and telecommunications servicing is completely on-site.
Low Density	
Typical Built Form	Low density housing comprising single and two storey detached housing on medium to large allotments, with small to medium setbacks to side boundaries, relatively large setbacks to the street, and reasonable areas of private open space.
Gross Density	1 to 10 dwelling per hectare
Typical minimum lot size	1000m ² to 1 hectare
Locational Description	Low density housing occurs on greenfield development sites on the fringes of the metropolitan area, within rural towns and within established suburban areas, where constraints such as topography, vegetation, character and/or absence of reticulated sewerage services have prevented subdivision to higher densities.
Suburban (Standard) Density	
Typical Built Form	Medium density housing development ranges from single or two storey detached dwellings mixed with semi detached or row dwellings, interspersed with some small apartment buildings (around three storeys). Setbacks to side boundaries are minimal with small setbacks to the street

Gross Density	11 to 25 dwellings per hectare
Net Density	14 to 33 dwellings per hectare
Typical minimum lot size	400m ² to 800m ² . Note that density may be achieved through construction of multiple dwellings on larger lots.
Locational Description	Medium-density housing should occur within inner and middle suburbs in the metropolitan context as well as within proximity to centres of major rural towns. It should occur in locations close to public transport, shops, community services and facilities where there is a good recreation and open space network.

High Density

Typical Built Form	High-density housing development includes terrace housing mixed with residential multi-flat buildings and apartment buildings generally three storeys in height or greater, but may include alternative housing forms which deliver high dwelling yields. High-density housing development includes high rise development.
Gross Density	Greater than 25 dwellings per hectare
Net Density	Greater than 34 dwellings per hectare
Typical minimum lot size	Subdivision of individual lots should be discouraged in order to maximise potential for development of larger lots into desired density with a variety of housing types.
Appropriate Locations	High-density housing should occur in locations of intense activity with excellent public transport links. High density housing will be limited to locations in Greater Hobart within the higher order Activity Centres and as part of transit orientated development along major public transport routes.

5. Towards a Settlement Strategy

5.1 The Future of Residential Development

Clearly, in the absence of any State or regional level land use and settlement planning, residential development has been occurring in an ad-hoc manner in Southern Tasmania for decades. Small shack settlements are evolving into permanent residential populations with absence of physical, social and community infrastructure. Urban areas are rapidly expanding, with larger dwellings on larger allotments being a consistent trend, while both rural living and low density residential development are becoming more prevalent.

The contemporary imperatives of climate change, peak oil and changing demographics however mean that the way that residential development has occurred in the past 20 to 30 years is not sustainable into the future. The metropolitan policies contained within the Regional Strategy will address these sustainability issues at a more detailed level for Greater Hobart. Outside of Greater Hobart there is a need to move towards consolidation and strengthening of existing settlements, already recognised in the sub-regional and municipal level strategies recently completed in Southern Tasmania: the Joint Land Use Planning Initiative, Vision East 2030 and the Huon Valley Land Use & Development strategy. This policy direction has a range of economic, social and environmental benefits including the following:

Economic

- Greater efficiency in provision and maintenance of infrastructure such as roads, electricity, sewerage, water, schools, health facilities and the associated long-term cost savings.
- Reduced travel distances and overall travel costs.
- Reduced costs associated with building and construction.
- Protection of the rural based assets that underpin economic development from the conversion of productive rural land to residential uses, and from the curtailing of rural economic activity due to amenity conflicts with new residents seeking 'lifestyle'

Social

- Greater viability of shops and other commercial activities in activity centres.
- The ability to support a wider range and diversity of community services.
- Fostering of greater social interaction, particularly for young people and the elderly.
- Developing and maintaining a sense of place and worth of community life.
- Providing a range of housing types depending on stage of life cycle.
- Reduced potential for rural-verses-residential land use conflict in productive rural areas.

Environmental

- Reduction in the development footprint.
- Reduction in greenhouse gas emissions by reducing car-dependent travel.
- Protection of native vegetation, ecological, landscape and cultural values.
- Reduction in fettering of non-residential activities by residential development.

- More efficient use of resources required to maintain human life.

5.2 Rural Living

As indicated in Section 4.1, rural living development is increasingly occurring across the region, often in areas arising from a legacy of ad-hoc settlement expansion within Southern Tasmania. It is important to consider opportunities for rural living as part of any settlement strategy as it provides residential opportunities that can either complement or undermine urban areas, towns and their desired characteristics.

As discussed in the Joint Land Use Planning Initiative Settlement Strategy (Pitt & Sherry 2009a: 10) rural living can encompass both positive and negative social, economic and environmental impacts.

Table 6: The social, economic and environmental impacts of rural living (Source: *Hollier & Reid as quoted in Pitt & Sherry 2009a*)

Indicator	Positive Impacts	Negative Impacts
Social	<ul style="list-style-type: none"> • Breakdown in divide between urban and country dwellers • More people in some rural areas maintaining communities • Greater cultural diversity • New people, new skills, ideas and financial capital • Improved lifestyle for individuals within the community (in response to diversity, new business ventures) • Improved infrastructure to cater for population increase • Provide scenic attributes 	<ul style="list-style-type: none"> • Loss of cultural heritage associated with traditional farming and farm life • Diminished cultural integrity (continuation of local culture and traditions) • Conflicts between values, attitudes, aspirations and practices of small and large farmers • Rapid turnover of properties eroding social capital in rural communities • Increased social tension • Increased pressure on services
Economic	<ul style="list-style-type: none"> • More diversified and resilient rural economies • Increased land values in certain areas • Flow-on wealth to landowners, real estate 	<ul style="list-style-type: none"> • Fewer farmers leading to loss of agricultural production and agricultural income. • Rising land value of agricultural land limiting expansion of fully commercial enterprises • Inefficiency (It is generally recognised that economies of size accrue in farming)
Environmental	<ul style="list-style-type: none"> • More people to undertake conservation work • More attention to land planning • Attraction to nature and land 	<ul style="list-style-type: none"> • Smaller property sizes and higher population densities leading to increased environmental impacts (eg. Farm dams). • Difficulties in coordination of land

- | | |
|--|---|
| <p>stewardship ethic Increased biodiversity due to more diverse land management practices</p> <ul style="list-style-type: none"> • Act as buffers against urban encroachment • Lower intensity of land use • Greater reliance on conservation practices | <p>management activities</p> <ul style="list-style-type: none"> • Loss of amenity, urban sprawl • Lack of experience, knowledge, interest leading to poor land management of weeds, less awareness of pest and disease risk, less work on environmental problems like soil health |
|--|---|

5.3 Residential development in Agricultural Areas

Residential development in agricultural areas has typically occurred because of the need to manage farming or other agricultural operations. With contemporary farming practices and an open unprotected market, agricultural production is more dependent than ever on minimise land use competition and maintaining operational flexibility. Both small lot subdivision and dwellings not required to support the management of the land can constrain and hinder the ability of farmers to operate (otherwise referred to as fettering). They can also affect potential opportunities to grow farming operations and businesses through land acquisition or intensification.

For this reason it is important that the Regional Land Use Strategy recognises that residential development in agricultural areas is a subsidiary use of the land and should only be allowed where it does not further fetter agricultural potential (either now or into the future).

N.B: An analysis of agricultural activity and its value to the region has been examined in Background Report No. 7: Productive Resources.

5.4 Non-Metropolitan Settlement Strategies

While growth and development in regional (including coastal) towns and villages can increase economic activity and improve the viability of services, poorly managed growth can detrimentally impact on those characteristics which make these areas desirable places to live and visit⁷ (Aurecon 2009).

Fortunately across the region recent strategic planning efforts at the sub-regional and municipal level have recognised the need to plan for residential growth through coordinated settlement strategies. Moreover these strategies cover nearly all areas outside of the Greater Hobart area, with the exception of the lower Channel area. These form as solid and sound basis for moving towards a whole of region settlement strategy for Southern Tasmania.⁸

⁷ Many regional towns and villages support the tourism industry within the region. The impacts of poorly managed growth and development on the tourism industry is discussed in Background Report No. 10: Tourism and Land Use Planning.

⁸ As discussed in Background Report No. 1: The Project Background, the intention of the Regional Planning Project is to only require change to existing sub-regional or local strategy and policy where there is a demonstrated regional need to do so.

5.4.1 Joint Land Use Planning Initiative

The Joint Land Use Planning Initiative was a strategic planning project for sub-regional area covered by the Brighton, Central Highlands, Derwent Valley and Southern Midlands municipal areas (also funded by these Councils). The project (Pitt & Sherry 2009a) identified a settlement hierarchy for the sub-region as follows:

Settlement Category	Areas
Urban Development Areas	Bridgewater-Gagebrook, Brighton and residential areas ⁹ New Norfolk
Service Centres	Oatlands Campania Ouse Bothwell Hamilton Kempton
Villages	Ellendale Maydena Gretna Bushy Park Glenora Woodsdale and Levendale
Managed Rural Living Areas	Pontville-Bagdad-Kempton Corridor Lachlan/Glenfern Magra/Lawitta Westerway Brighton (Honeywood) Rural Living Areas

The Highland Lakes was the subject of a further more detailed settlement strategy (Pitt & Sherry 2009b) under this project, which categorised the various settlements across the Highland Lakes into the following 3 categories:

- Service Centre Settlements where there is at least 50 plus shacks or residential dwellings, some existing infrastructure and services such as a store, some accommodation, a service station, and some camping facilities and some basic community services such as a rural fire brigade or waste transfer station. There is potential to provide for further residential and tourist development and build on the existing services available.
- Tourist Focused Settlements which are mainly the old Hydro towns and retain some dwellings and/or shacks and tourist related infrastructure such as a caravan/camping park, tourist accommodation, and food services. Future development is likely to continue to be tourist focused.

⁹ The areas within the Brighton municipal area have been subsumed into the metropolitan area of Greater Hobart due to the connectivity of urban form and the social and economic relationship of this area to the whole of Greater Hobart.

- Shack Settlements which have originated mainly as fishing shacks on Crown land but now have gained freehold title via the Shack Site Categorisation Program, and have basic domestic water and sewerage infrastructure but few other services. Many are surrounded by land of high conservation value, or marshy areas and development opportunities consist primarily of infill and consolidation. Further spreading along the lakes of such settlements is discouraged.

5.4.2 Vision East 2030

In recognising the commonality of their planning issues, the Glamorgan Spring Bay, Sorell¹⁰ and Tasman Councils together with Break O’Day Council (in the northern region), the Department of Economic Development, Tourism and the Arts and the Tasmanian Planning Commission undertook a strategic land use planning project known as Vision East (Aurecon 2009). The land use planning framework prepared from this project identified a settlement strategy with associated growth scenarios for those settlements as follows:

Settlement	Current Classification	Proposed Classification	Growth Scenario
St Helens*	District Town	District Town	High Growth
Triabunna	Township	District Town	High Growth
Bicheno	Township	Township	Medium Growth
Swansea	Township	Township	High Growth
St Marys*	Township	Township	Medium Growth
Nubeena	Village	Township	Medium Growth
Orford	Village	Village	Medium Growth
Scamander*	Village	Village	Medium Growth
Fingal*	Village	Village	Low Growth
Dunalley	Village	Village	Low Growth
Eaglehawk Neck	Hamlet	Village	Low Growth
Taranna	Hamlet	Village	Low Growth
Coles Bay	Tourist Precinct	Tourist Precinct	Low Growth
Port Arthur	Tourist Precinct	Tourist Precinct	Low Growth
All other settlements	Hamlets	Hamlets	Low Growth

*these settlements are in the northern region

¹⁰ The western part of the Sorell municipal area (Midway Point, Sorell and Southern Beaches) were excluded from the project area

5.4.3 Huon Valley Land Use & Development Strategy

The Huon Valley Council prepared a detailed municipal level land use and development strategy which consider the regional context and role of the municipal area (GHD 2007). The Huon Valley Land Use & Development Strategy identified a settlement strategy for the area as outlined below. In addition this Strategy proposed limiting low density and rural living areas to those meeting a set of criteria or where existing, in order to protect the long term viability of the Huon's agricultural production.

Category	Settlements	Growth Strategy
Major Settlements	Huonville (including Ranelagh), Cygnet, Franklin, Geeveston and Dover	Development encouraged into these settlements. Growth boundaries identified and land provided for commercial, industrial, community and residential uses through structure plans (including in the Strategy with the Huonville/Ranelagh structure plan currently being updated).
Minor Settlements	Port Huon, Glen Huon/Judbury, Southport, Grove	Development constrained by limited servicing and environmental impacts. Future growth on an infill basis only and within environmental constraints.
Hamlets and Other Small Settlements	Verona Sands, Garden Island, Randalls Bay, Eggs and Bacon Bay, Abels Bay, Charlotte Cove, Rocky Bay, Deep Bay, Surveyors Bay, Roaring Beach and Little Roaring Beach.	No further subdivision and development only allowed on existing vacant lots within developed areas and subject to strict environmental criteria.

5.5 Metropolitan Growth Scenarios

As the largest single settlement within the region, Greater Hobart will need to accommodate the majority of residential growth over the next 25 years. As indicated in Section 3.1 the demand forecast for the planning period under the Regional Land Use Strategy is 26,500 new dwellings.

Three key growth scenarios to accommodate this dwelling demand forecast have been examined.

5.5.1 Scenario 1: Full Consolidation

Given the identified pressures on land supply in Greater Hobart, the changing demographic profile, household composition and size, and increase number of households, consolidation of the existing urban area through infill development is a future growth scenario that carries substantial merit.

With over 90% of the region's employment opportunities focused within Greater Hobart, of which 47% are within the Hobart LGA, and 18.5% in Glenorchy, there are clear advantages to providing increased housing opportunities in both these major urban areas, which are close to employment services and key cultural and social facilities. In addition, accommodating future dwelling growth in the existing urban areas will result in a far more sustainable pattern of development and minimise further loss of natural values (including some of the key landscape corridors such as Wellington Park and the Meehan Range) and productive land (noting that the regionally significant South East Irrigation District is in very close proximity to the eastern half of the current urban footprint – see Background Report No. 7 – Productive Resources). A full consolidation based settlement strategy could also contribute to a more compact, efficient, active and vibrant city in the long term.

Notwithstanding these potential benefits, a full consolidation strategy would have significant impacts upon the affordability of the market, noting the challenges to infill development discussed in Section 2.7, particularly in the absence of any other support strategies (including infrastructure provisions, taxes and levies). In addition, consumer preference in Greater Hobart would indicate that at present there is not enough demand to support this scenario with the result being movement of the population away from Greater Hobart or the region to seek alternative housing options.

Because of these impacts upon the housing market and the community this scenario has been dismissed.

5.5.2 Scenario 2: Continuation of Current Trends

This scenario is based on an 85/15 greenfield to infill ratio and is considered across two different densities options:

- Allowing current average densities of between 7 to 10 dwellings per hectare (net density) (Scenario 2A)
- Requirement for a minimum net density of 15 dwellings per hectare¹¹ (Scenario 2B)

Scenario 2A would require between 2252 and 3218 hectares of additional residential land across the 25 year planning period, while Scenario 2B would 1501 hectares (see Figure 5 below).

¹¹ 15 dwelling units per hectare is recognised in other jurisdictions as being the minimum density at which residential development can support bus based public transport and deliver cost efficiency in other physical infrastructure.

The primary question under this scenario is whether the region can realistically sustain such consumption of land for residential purposes without significant economic, social and environmental impacts. For example, greater development in urban fringe areas that lack appropriate transport infrastructure and public transport services increases dependency on private vehicle use. In 2006, over 66% of the total number of employed persons in the greater Hobart region used private vehicles as their main mode of transport to and from work. This dependency has substantial impacts on environmental sustainability, through increased pollution and greenhouse gas emissions, impacts on the efficiency of the transport networks through greater traffic congestion and road safety issues, and additionally raises issues of social equity.

For certain social groups, such as the elderly, disabled, youth and low income households, being limited in their access to the use of private vehicles can be a major constraint to access basic services, educational facilities, and recreational and community activities.

Continual urban expansion also requires the provision of new physical infrastructure, which can impose substantial costs on public entities and developers, in turn affecting the affordability of housing. Infrastructure costs, which represent a considerable proportion of Government-related charges on new houses, are second only to construction costs as the most significant component of new housing costs (Property Council 2006). In addition to direct infrastructure costs such as for the provision of reticulated water and sewerage, electricity and telecommunications, indirect infrastructure costs for roads, public transport facilities, open spaces, community services, facilities and amenities all contribute to additional financial burdens on local and state government and, therefore, the population generally. It is concluded that a continuation of the current trends cannot be afforded on economic grounds alone, nor for environmental sustainability reasons.

5.5.3 Scenario 3: Balancing Infill and Greenfield Development

Although infill development has significant advantages as a residential growth strategy, the associated affordability and social equity issues determine that it is unlikely to be considered the singular ideal growth strategy required to adequately provide for the housing needs of the Greater Hobart region. Greenfield development, whilst demonstrably unsustainable if allowed to expand without constraint, is nevertheless an important element in providing diversity of housing. To overcome the shortfalls of both types of development, and gain the advantages offered by each, it is considered that the most effective future growth scenario for the Greater Hobart region will be derived from an appropriate balance of infill and greenfield development. A proportional balance will respond to the population's emerging housing needs by provide a range housing options, locations and levels of affordability.

This scenario is therefore based on a 50/50 greenfield to infill ratio and is considered across two different densities options:

- Allowing current average densities of between 7 to 10 dwellings per hectare (net density) (Scenario 3A)
- Requirement for a minimum net density of 15 dwellings per hectare¹² (Scenario 3B)

Scenario 3A would require between 1325 and 1893 hectares of additional residential land across the 25 year planning period, while Scenario 3B would 883 hectares (see Figure 5 below).

¹² 15 dwelling units per hectare is recognised in other jurisdictions as being the minimum density at which residential development can support bus based public transport and deliver cost efficiency in other physical infrastructure.

Achieving this balance will require targeted action for development in specific areas. Greenfield, greyfield and brownfield sites in close proximity to major transport corridors should be developed as a priority. As highlighted in the Southern Integrated Transport Plan (DIER 2006), the integration of land use and transport planning will encourage urban consolidation and development in locations with existing social and physical infrastructure. Reducing lot sizes within these new sites will also work towards maximising the economic, environmental and social benefits of increased residential densities.

Another consideration in the balance of infill and greenfield development is the responsiveness of the market to the push towards greater infill and higher densities. Given demographic characteristics, existing settlement patterns and market preferences in Greater Hobart, concession must be made for the likelihood that the increase in the response rate of the market to residential densification will be gradual.

Over time, intervention from State and Local Government can aim towards decreasing the costs of infill development and creating the circumstances in which the market will respond to infill opportunities by:

- mitigating planning constraints for infill development;
- providing physical and social infrastructure (including improved public transport) to attract investment in land use changes;
- creating high quality urban environments and open spaces to improve amenity in existing urban areas;
- identifying and facilitating key greyfield and brownfield (provided that it is identified as surplus or inappropriate industrial land) redevelopment opportunities; and
- actively facilitating public private partnerships particularly to assist in supplementing the stock of affordable housing in existing urban areas.

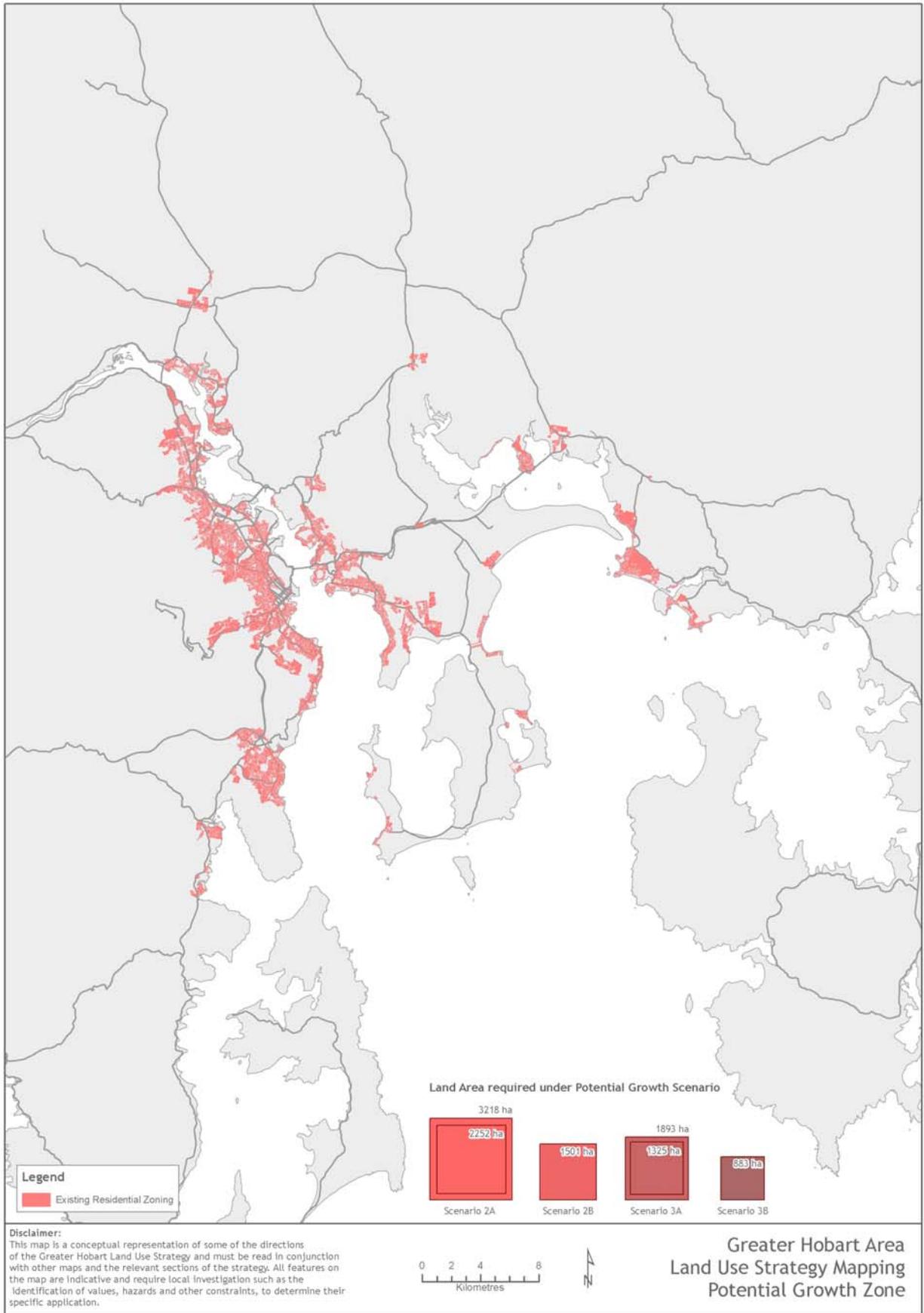


Figure 5: Residential land requirements (ha) for metropolitan growth scenarios

6. Conclusion

6.1 The Regional Settlement Strategy

With the extensive sub-regional and municipal level work in preparing settlement strategies that consider in a detailed manner land supply, constraints and opportunities for individual settlements, the formation of a Regional Settlement Strategy will only requiring the evaluation of these against each other and the other regional policies within the Regional Land Use Strategy (in particularly those relating to productive resources and activity centres) and filling in of the gaps to ensure a holistic pattern of settlement across the region.

The Regional Settlement Strategy will:

- Encourage the consolidation and strengthening of rural towns and villages;
- Discourage the dispersment of new residential uses in productive rural areas not associated with rural activity;
- Plan for rural living opportunities to minimise detrimental impacts;
- Minimise further residential development in areas at risk from hazards such as sea-level rise, flooding and bushfire;
- Maximise use of existing infrastructure;
- Avoid the creation of any further environmental issues caused by on-site wastewater disposal;
- Prevent linear development in coastal areas; and
- Protect distinct landscape character.

Settlement will be classified into a network that recognises a regional hierarchy for residential growth.

Table 7: Possible Regional Settlement Hierarchy

Greater Hobart (including the main Urban Area and Satellites)	
Description	<p>The Greater Hobart Urban Area is the largest urban area in the State and the region. As the economic and social centre for the region it provides all the higher order administrative and commercial functions as well as a significant proportion of all employment opportunities available. Greater Hobart is also the administrative and political centre for the State.</p> <p>Satellites are identified as former rural towns that now experience urban development pressures and have significant employment and economic relationship to the main centres of Greater Hobart.</p> <p>An Urban Growth Boundary and specific land release program will be required to manage residential growth on a whole of settlement basis (see Section 5.6.2 below)</p>
Population*	200,000+ (including all Satellites and dormitory suburbs)
Utility Connections	Full reticulated services

Services	A full range of services as provided through the Activity Centres Network
Growth Strategy	Will be identified through a specific spatial strategy including Urban Growth Boundary
Dormitory Suburb of Greater Hobart	
Description	Predominantly residential settlements where residents are highly dependent upon services and facilities within Greater Hobart, particularly for employment
Population*	See above
Utility Connections	Should have reticulated water, wastewater and electricity
Services	May contain small scale services such as local shop/newsagents and petrol station.
Major District Centre	
Description	Significant urban areas physically divorced from Greater Hobart where residents of and visitors to the region can access a wide range of services, education and employment opportunities, although employment is strongly related to surrounding productive resources. Important centres to surrounding sub-region.
Population*	2000+
Utility Connections	Reticulated water, sewerage, stormwater and electricity
Services	See Activity Centre Network: Rural Services Centre
District Town	
Description	Larger townships located at significant distances from Greater Hobart providing lower order administrative and commercial functions for sub-regions where distances to major urban areas make regular travel difficult. Important centres for surrounding district.
Population*	1000+
Utility Connections	Reticulated water, sewerage and electricity
Services	See Activity Centre Network: Rural Services Centre
Township	
Description	Townships are residential settlements with a prominent town centres providing a number of facilities, some local employment opportunities and convenience shopping.
Population*	500 to 1500 (excluding any surrounding rural living areas)
Utility Connections	Electricity. May have reticulated water and sewerage if existing
Services	See Activity Centre Network: Town Centre
Village	
Description	Predominantly residential settlements with a small often mixed use centre that provides

	for basic services and daily needs
Population*	200 to 600 (excluding any surrounding rural living areas)
Utility Connections	Electricity. May have reticulated water and sewerage if existing
Services	As a minimum local convenience shop, newsagent/post office agency, community hall

Other Small Settlement

Description	Residential settlements with limited or no services and commercial activity in a defined spatial area. Often holiday settlements that have more recently established a more permanent population.
Population*	Up to 200 (excluding any surrounding rural living areas)
Utility Connections	Electricity.
Services	May have local convenience shop or community hall

*permanent population as opposed to peak population during holiday months.

6.2 The Metropolitan Settlement Strategy

Scenario 3B clearly represents the less land intensive option for residential growth in Greater Hobart. Increasing densities and utilising less residential land for growth will have a number of benefits including:

- Supporting greater use of public transport;
- Minimising cost of physical infrastructure such as roads, water and sewerage (around 90% of the real cost of providing water and sewerage is recognised by Southern Water as arising from the hard infrastructure itself).
- Minimising loss of native vegetation, natural landscapes and associated biodiversity and ecological values (three are significant tracts of native vegetation including threatened vegetation communities along the urban fringe); and
- Protecting agricultural land in particularly the economic important and agriculturally significant South-East Irrigation Area extending across the Brighton, Clarence and Sorell municipalities.

It is therefore concluded that the Strategy should proceed on the basis of Scenario 3B.

Clearly the most appropriate mechanism in light of current planning processes under the *Land Use Planning and Approvals Act 1993* is to manage residential land supply and release within the context of Greater Hobart through an Urban Growth Boundary. The draft Strategy included an Urban Growth Boundary, which set the extent of an Immediate Land Supply period (around 5 years). As a result of concerns raised during the consultation period (see separate Consultation Report) and a review of its consistency with other jurisdictions the mechanics behind the urban growth boundary have been adjusted for the final version of the Strategy.

It is intended that the Urban Growth Boundary sets the boundary for growth based upon a 20 year residential land supply. It will include land not yet zoned for residential and land for other urban uses (such as commercial and industrial activity). On the basis of growth scenario 3B, the total land required for further greenfield development for a 20 year supply horizon equates to 706 hectares of residential land (using net density).

On the basis of the Dwelling Yield Analysis the residential zone with the new planning scheme being immediately prepared should only include that which is currently zoned or approved by the Commission as such in the next 6 months, within the residential zone (in order to provide for procedural fairness).

Land releases within the Urban Growth Boundary will then need to be determined through a process of Structure Plans¹³ (ideally prepared through the ongoing Regional Planning and/or Capital Cities planning structure) to ensure the orderly release of land, with Site Development Plans¹⁴ for all new subdivisions required by Planning Schemes. Structure plans should related to the whole growth precinct and the order of land releasing assessed against an objective assessment matrix that ranks ease of infrastructure provisions, extent of constraints or values and cost factors. Given that zoning is the primary supply mechanism, the existing planning scheme amendment process under the *Land Use Planning and Approvals Act 1993* would be utilised to release land once a Structure Plan has been prepared.

The revised Urban Growth Boundary with key growth areas will be included in the Strategy and will need to be mapped on the basis of known constraints, values and opportunities including infrastructure capacity, environmental, landscape and heritage values and land hazards (including bushfire risk, flooding potential and sea level rise and storm surge risk from the Stage 1 Tasmanian Coastal Vulnerability Project) and the Activity Centres Network.

The urban growth boundary will also need to be mapped in such a way that it minimises growth in the 'dormitory suburbs' to Greater Hobart in favour of growth to the main urban extent in order to maximise infrastructure capacity and access to services, minimise infrastructure costs and create the most sustainable pattern of greenfield development.

In addition the Strategy will target specific areas along high frequency public transport corridors and around the major activity centres for higher density infill development and to make more efficient use of existing urban footprint.

It is recognised that the underlying residential policies for Greater Hobart can be compromised by uncontrolled lower density development outside the Urban Growth Boundary or the conversion of rural land to rural residential development. In this respect, the achievement of the overarching Regional Settlement Strategy is just as integral to the success of the Metropolitan Settlement Strategy as the concept of the Urban Growth Boundary.

It is further recognised that the success of the Metropolitan Strategy will also require:

- Targeting of specific transit orientated development (or mixed commercial and residential development) along main transit corridors;
- Reduction in the regulatory barriers to multiple dwelling higher density development within planning schemes (subject to consideration of issues such as heritage listings and heritage areas);
- Cooperation between the public and private sector to target and develop major greyfield and brownfield sites;
- Provision of high quality open spaces and urban environments to support the amenity of higher density living;

¹³ A Structure Plan is a plan that illustrates the proposed structure and layout of a future development area extending across multiple titles and/or land ownership. In addition to illustrating details such as road configuration, infrastructure provision and the location of retail and community facilities such as shops, schools and public open space, a Structure Plan should also show details such as housing density, land use classifications and buffer zones.

¹⁴ A Site Development Plan is based upon detailed site investigations and demonstrates how an individual subdivision design meets the relevant objectives and criteria under a planning scheme.

- The coordination, use and development of Crown Land across Greater Hobart;
- Specific government initiatives in providing affordable housing;
- Dispelling common negative 'urban myths' about multiple dwelling development and the importance of higher urban densities in achieving a more sustainable future through promotion;
- Ensuring consistent developer charges for physical infrastructure and in a manner that will assist to deliver the desired settlement strategy;
- Ensuring developer charges for infrastructure reflect long term cost benefits of creating higher density areas and increasing densities in existing serviced areas; and
- Reducing construction costs of infill development by minimising unnecessary state and local government fees and charges.

Finally, achievement of the greenfield and infill targets will need to be constantly monitored by the ongoing regional planning function through dwelling approval data on at least a yearly basis and if less than desired percentage of new infill dwellings are approved in any one year then this should trigger the review of residential policies under the Strategy and potential further infill incentives or restriction of land releases within the Urban Growth Boundary.

7. Glossary

Affordable Housing	Housing that is affordable for households on low to moderate incomes, when housing costs are low enough to enable the households to meet other basic long-term living costs. For example household costs should be less than 30 per cent of household income for occupants in the bottom 40 per cent of household incomes.
Brownfield Sites	Underutilised or former industrial or commercial sites in an urban environment characterised by the presence of site contamination
Density	Number of dwellings per hectare
Greenfield Sites	Former agricultural or undeveloped natural land on the periphery of towns and cities that has been identified for urban development.
Greyfield Sites	Underutilised, derelict or vacant residential or commercial sites in an urban environment that are not contaminated.
Gross Density	The number of dwelling per hectare on a given land area, including public infrastructure such as roads, public open space and, in some instances, non residential development (e.g. schools and local shops).
Infill Development	Development within existing urban areas through: <ul style="list-style-type: none">a. Small scale subdivision or unit development on existing residential lots; orb. Redevelopment of brownfield or greyfield sites. May involve increases in density.
Net Density	The number of dwelling per hectare on land devoted solely to residential development. While it includes private driveways and private open space, it does not include public infrastructure such as roads, streets and public open space.

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Southern Tasmania
REGIONAL PLANNING PROJECT

The Southern Tasmania Regional Planning Project

is a joint initiative of the State of Tasmania, the Southern Tasmanian Councils Authority,
the 12 Southern Councils and the Sullivans Cove Waterfront Authority