MIDCOAST council

ZONING IN on our future

URBAN LAND MONITOR 2016 - 2036

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Contents

Executive Summary

MidCoast has aspirations of continued growth supported by increased employment, community and recreation opportunities, while being responsive to the natural environment.

The MidCoast Urban Land Monitor (ULM) examines our residential land supply and future demand through to 2036 and will assist Council to facilitate these aspirations.

The ULM primarily examines residential settlements that have been identified by the Hunter Regional Plan 2036 as either a Strategic Centre or a Centre of Local Significance (as shown in Figure 1). These centres represent approximately 70% of the entire MidCoast population and accommodate over 95% of population growth.

In developing land supply projections for the ULM, only those existing urban release areas that have been identified in previous local and regional strategies, where there is a high likelihood of residential development occurring, have been considered.

The ULM is a resource for land use planning on the MidCoast through to 2036, as it highlights key considerations to be addressed now in order to guide future residential growth in a sustainable way.

The growth of residential centres also has significant ramifications for our planning of employment, community, recreation and tourist uses, as well as local and regional infrastructure.

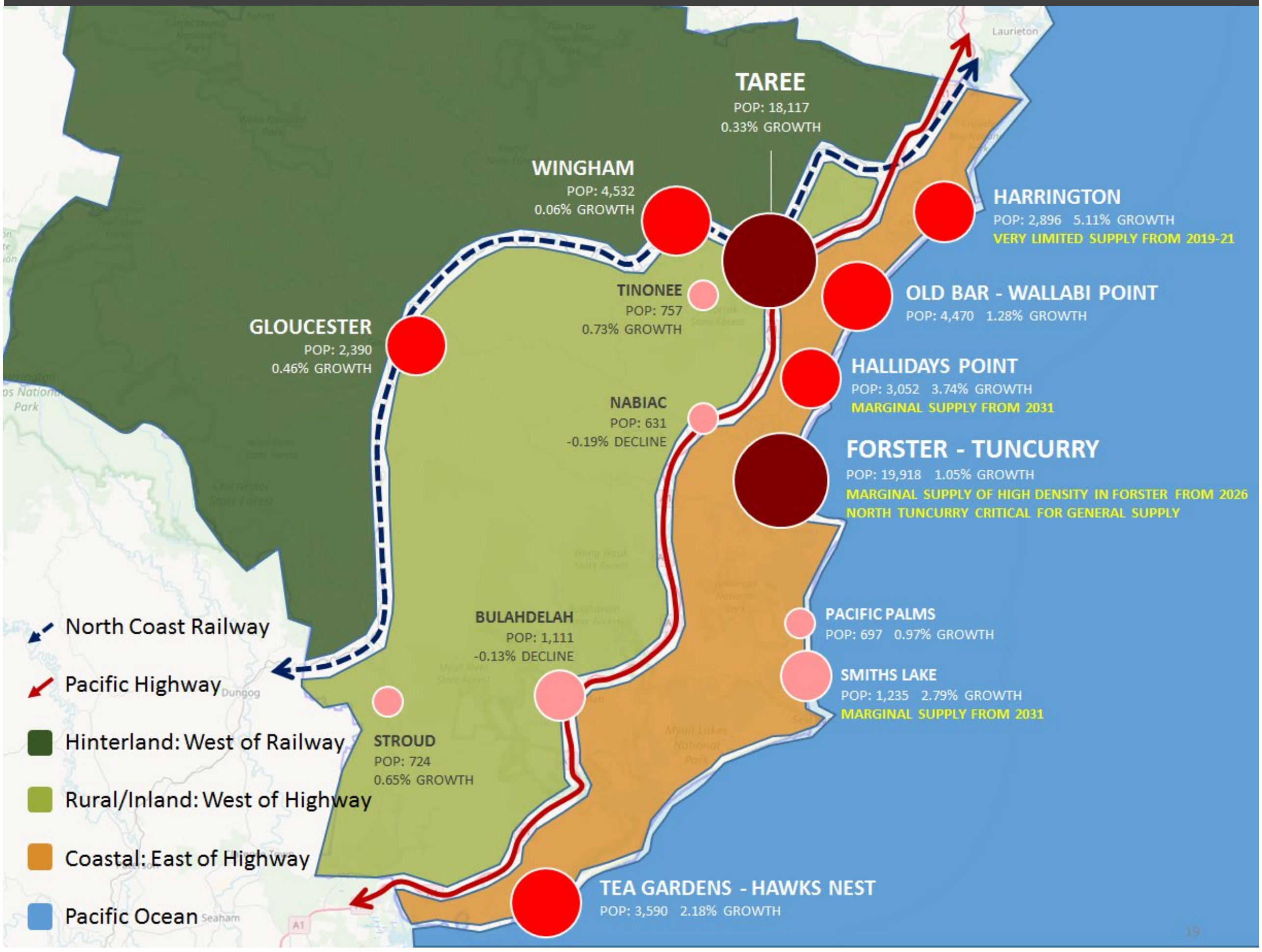
The findings from this document have therefore been used to guide preparation of the Draft Housing Strategy, Draft Employment Zone Review and other key documents in the current strategic planning work program that will inform a future consolidated MidCoast Local Environmental Plan and Development Control Plan.

Major findings

Overall, the entire MidCoast has adequate supply of residential zoned land to meet historic average growth rates until 2036. However, examining centres at a local level highlights development pressure is being experienced within coastal areas (also refer to Figure 2):

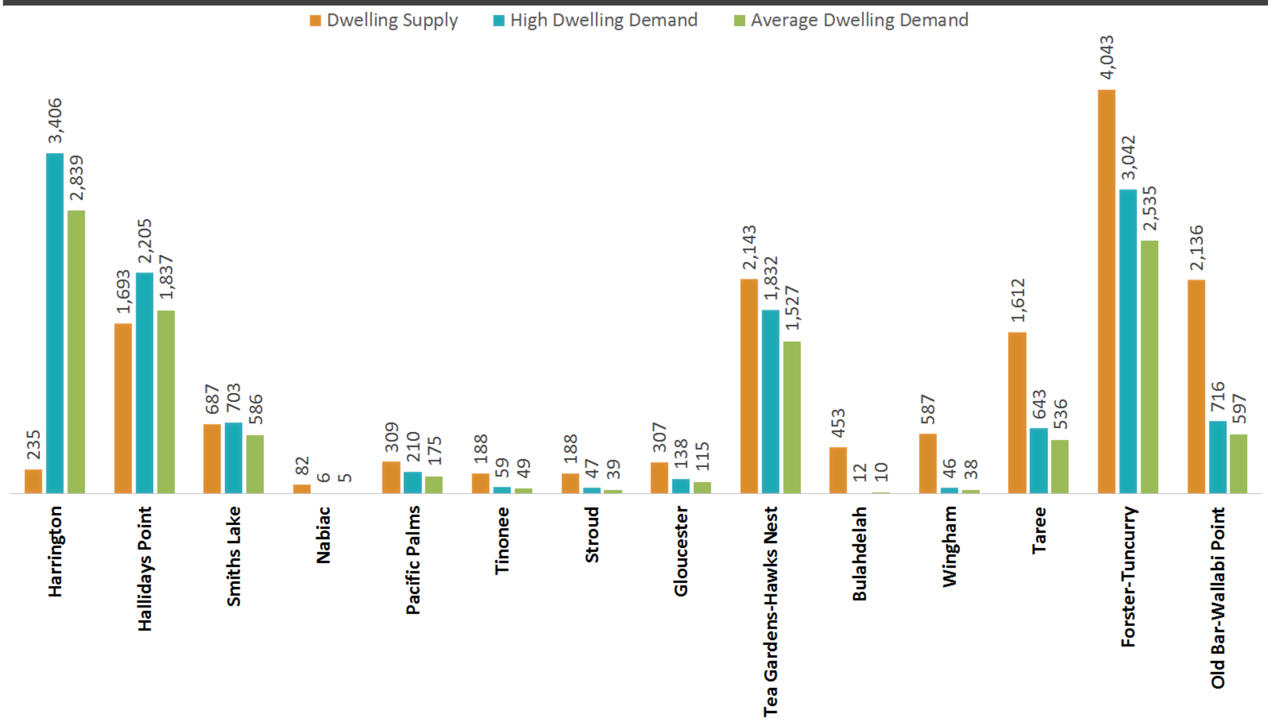
- Forster-Tuncurry currently has adequate residential supply, however this is critically dependent on the development of North Tuncurry (approximately 1,900 dwellings), as many future residential sites in Forster have ownership, contamination or other constraints.
- There is approximately 10 years of supply of R4 High Density Residential zoned land in Forster, which provides unit accommodation for residents, investors and tourists.
- Harrington will exhaust locally available residential land supply by 2019-2021 if it experiences the average growth across all coastal centres (2.7% since 2011) or even sooner if it continues to experience its own current very high growth rate (5.11% since 2011).
- Hallidays Point and Smiths Lake have potential residential land supply shortages which should be monitored closely over the next 10 years and decisions made as to whether additional growth (land release) is supported or is a priority.
- The future development at Brimbin (an approved new town north of Taree) has the potential to deliver 8,000 residential lots and have a considerable impact on the housing demand and supply for the northern MidCoast region. An estimated 10% (800 lots) will be developed by 2036.

Figure 1: MidCoast Centres Supply and Demand Hot Spots to 2036



Source: Population data from 2016 ABS census and annual cumulative growth rates calculated from 2011 and 2016 ABS

Figure 2: Supply and Demand Comparison Overview 2016-2036



Next steps

In the short term, following exhibition of the Housing Strategy and other strategic land use planning documents, Council may need to review the findings of the ULM to more accurately reflect recommendations to amend residential zones and development standards through the new MidCoast LEP and DCP.

In the medium to long-term, information in the ULM will assist Council to establish and implement an Urban Development Program as required by the NSW Department of Planning, Industry and Environment's Hunter Regional Plan 2036:

Action 25.1 Urban Development Program: *to develop data on existing zoned land supply and its servicing status, monitor dwelling production and take-up rates, and coordinate the staged release and rezoning of land.*

The projections in the ULM are a guide only and will need to be reviewed approximately every 5 years as part of the Urban Development Program, following the release of national census data (next review scheduled for 2022).

The challenges identified above will be addressed primarily through the strategic planning approach to the MidCoast Local Environmental Plan (and associated strategy and consultation work) and residential Planning Proposals as detailed in Section 5.

Further consultation and planning across Council will also help to gain a better understanding of ecology, employment, community, recreation, tourist and infrastructure implications and the role these play in determining the supply of residential land.

1 Introduction

Aim and Objectives

The aim of the Urban Land Monitor (ULM) is to examine if the MidCoast has adequate residential land supply to meet population projections through to 2036.

The objectives are to:

- provide a holistic ‘snapshot’ of available residential land supply;
- understand the demand for residential land based on population projections;
- identify planning considerations to be addressed now in order to be able to respond to future growth in a sustainable way; and
- to enable regular monitoring of land supply and demand in the future.

Background

The outcomes of the ULM will inform the Draft MidCoast Housing Strategy and other major strategic projects such as the Rural Strategy and the Employment Zones Review. These projects will in turn inform preparation of the consolidated MidCoast Local Environmental Plan and Development Control Plan.

Scope

The ULM primarily examines residential settlements that have been identified by the Hunter Regional Plan (HRP) as either a Strategic Centre or a Centre of Local Significance (see below table).

These and other smaller local centres operate as part of a network. Each centre provides a different service, role and function in the region. Strategic centres will generally be the focus for population and economic growth over the next 20 years.

Some local centres of significance that are in reasonable commuting distance of strategic centres and which have a range of lower order services and facilities, will also support population growth.

Additionally, some other localities have been included in the ULM where they already have large parcels of land identified in a regional or local strategy for future residential growth. These localities include: Green Point, Coopernook, Landsdowne and Karuah (North).

Strategic Centre	Centre of Local Significance [Rural/Inland]	Centre of Local Significance [Coastal]
• Taree (and Cundletown) • Forster -Tuncurry	• Wingham • Gloucester • Bulahdelah • Tinonee • Stroud • Nabiac	• Old Bar (and Wallabi Point) • Tea Gardens - Hawks Nest • Hallidays Point (including Red Head, Diamond Beach, Black Head and Tallwoods) • Harrington (and Crowdy Head) • Smiths Lake • Pacific Palms (including Blueys Beach, Boomerang Beach, Elizabeth Beach)

Large lot residential sites are excluded from the Urban Land Monitor. While some large lot estates are located close to urban settlements, they are often located some distance away. A separate investigation into the supply and demand for large lot rural residential development has been undertaken which can be viewed in conjunction with this report.

Policy Context

This work is in accordance with the *Hunter Regional Plan 2036* (Action 25.1):

> *Establish and implement an Urban Development Program to develop data on existing zoned land supply and its servicing status, monitor dwelling production rates, and coordinate the staged release and rezoning of land.*

The ULM is the first step in achieving this requirement. Further work will be undertaken in upcoming years to transition the ULM into an Urban Development Program to assist Council in coordinating the sequence of future development.

Limitations

The Monitor provides a summary of the current supply and demand trends for land within a residential zone; and population trends across strategic centres and centres of local significance in the MidCoast Council area.

The report is primarily a desktop analysis based on the following sources from the three previous council areas (Great Lakes, Greater Taree and Gloucester):

- property database;
- aerial imagery;
- spatial database (mapping);
- records database;
- internal local knowledge; and
- targeted site visits undertaken in the coastal area

Whilst this report does not make any recommendations about the suitability of sites currently zoned for residential purposes, it does identify locations where there is a potential shortage of supply. Council has used this information to inform preparation of the Housing Strategy and Employment Zones Review.

In the short term, following exhibition and subsequent adoption of the Housing Strategy and other strategic land use planning documents, Council may need to review the findings of the ULM to more accurately reflect recommendations to amend residential zones and development standards.

In the medium to long-term, information in the ULM will assist Council to establish and implement an Urban Development Program as required by the Department of Planning, Industry and Environment's Hunter Regional Plan 2036.

The projections in the ULM are a guide only and will need to be reviewed approximately every 5 years as part of the Urban Development Program, following the release of national census data (next review scheduled for 2022).

The limitations and challenges identified above will be addressed primarily through the strategic planning approach to the MidCoast Local Environmental Plan (and associated strategy and consultation work) and residential Planning Proposals as detailed in Section 5.

Improvements on methods of collecting data will also be made as Council works towards the implementation of a single source property information system.

Further consultation and planning across Council will also help to gain a better understanding of ecology, employment, community, recreation, tourist and infrastructure limitations and requirements for future development areas.

Report Structure

The Urban Land Monitor has been prepared in two parts:

Part A: Findings and Directions is a summary document structured in the following way:

- Section 1 provides an **introduction** to the ULM, describing the aims, objectives and project scope.
- Section 2 describes the **methodology**. This has been explained in detail given the importance of the approach in establishing the supply and demand projections which are the basis of the report.
- Section 3 outlines the **strategic context** with discussion on MidCoast growth aspirations, demographics and population projections.
- Section 4 provides a **supply and demand overview** for MidCoast.
- Section 5 defines the **directions** relating to planning proposals, the housing strategy, other strategic planning projects and the MidCoast LEP.
- Appendix A outlines the **centres analysis** which looks in detail at each strategic, rural and coastal centre.
- Appendix B provides a **glossary of ABS terms** relevant to this report.

2 Methodology

This section outlines in detail the methodology used to establish the supply and demand projections which are the basis of the report.

The ULM analyses the residential supply and demand from 2016 to 2036. This timeframe is consistent with the *Hunter Regional Plan 2036.* It also aligns with available census data, projecting 20 years from our last census in 2016.

Method for calculating the supply of residential land

The supply of residential land has been determined by examining:

- ‘undeveloped residential land’ (URL) being vacant land currently zoned for residential development with a land area of greater than 0.5ha; and residential lots with the potential to be subdivided (house and land greater than 2ha);
- ‘urban release areas’ (URA) identified in the *Mid North Coast Regional Strategy 2006-2031* and other local strategies; and
- ‘infill lots’ were also taken into account in specific locations such as the Forster-Tuncurry R4 High Density Residential and R3 Medium Density Residential zoned land.

Importantly, after identifying the land areas noted above, the potential number of dwellings was established using a dwelling per hectare ratio appropriate for the zone, as well as considering broad level local development constraints.

Urban release areas

Urban release areas (URA) were previously identified in the *Mid North Coast Regional Strategy 2006-2031* or in other local strategies. Only those areas where there is a high likelihood of development occurring have been included.

Note: This land is not currently zoned residential but may be appropriate for residential rezoning in the future. However, many of these lands have constraints that would need to be addressed as part of a planning proposal.

Constraints can include ecological, bushfire, flooding, coastal erosion, Aboriginal and cultural heritage, mines and mineral deposits, contamination, acid sulphate soils, airport limitations and traffic. The extent of developable land would be determined through the assessment of these constraints during a planning proposal process.

Method for calculating the demand of residential land

The demand for residential land has been determined by examining population growth and projecting it cumulatively over the next 20 years.

Population growth has been sourced from two locations:

- Profile.id who provide statistical information across the MidCoast Council area; and
- Australian Bureau of Statistics (ABS) data for Urban/Centre Localities (UCL) for each individual centre.

Appendix B includes key ABS 2016 census dictionary terms.

Historical population growth rates and population projections

Population figures from the 2011 ABS census were used to establish average historical growth rates.

Ideally, 2001 or 2006 data would have been used, however this was not possible as some ABS boundaries have changed between the 2001/2006 and 2016 census.

The growth rate averages were applied over the next 20 years. Note that where growth was less than 0.1%, the rate of 0.1% has been applied.

An additional 20% of the 2016-2036 population growth was added to give a high growth demand scenario.

Note: the projections in the ULM are a guide only and will need to be reviewed every 5 years as part of the Urban Development Program, following the release of national census data.

Number of private dwellings

The ABS census information provides a figure for the number of 'private dwellings' in a locality. This does not include all the people residing in 'non-private dwellings' such as motels, hospitals and boarding houses.

This number of 'private dwellings' is important for reasons outlined below:

1. It provides a realistic estimate of the number of houses and units in a locality.
2. It is far more accurate than estimating the number of dwellings by other means (such as, dividing the population by the average number of people per household).
3. It takes into account 'occupied private dwellings' (mainly permanent residents) and 'unoccupied private dwellings' (mainly holiday homes or brand new housing stock). This is particularly important for MidCoast which experiences high rates of vacancy due to the proliferation of holiday homes and investment properties.

Dwelling demand projections

Based on the population and 'private dwelling' ABS data from 2011 and 2016, a 'population to private dwelling ratio' was established for each locality. This enabled Council to project the number of private dwellings needed from the population projections.

Aerial Photography

In Taree and Forster-Tuncurry, it was important to examine growth rates in terms of actual development on the ground. Aerial photography was used to examine development over 10+years to assist in providing a more detailed assessment for these strategic centres (see Appendix A).

Map illustrations

Maps of the MidCoast are presented within the ULM which aim to illustrate simply the region's main centres and spatial relationships. A basic background has been applied over the LGA which depicts very broadly, three main landscapes which are delineated by the Pacific Highway and North Coast Railway. These are:

- **Coastal – East of Highway**: which includes large centres along the coast as well as rural towns and villages which are strongly influenced by and linked to beaches or lakes.
- **Rural/Inland – West of Highway** (and East of Railway): which consists primarily of rural lands and towns.
- **Hinterland – West of Railway**: which consists predominately of environmental areas and rural villages.

3 Strategic Context

MidCoast Growth Aspirations

As outlined in MidCoast Council's key strategic documents (the Community Strategic Plan and the Delivery Program and Operational Plan), there is a clear aspiration for continued and strong population growth, supported by adequate provision of land for sustainable growth.

Community Strategic Plan

The MidCoast Community Strategic Plan 2018-2030: Shared Vision, Shared Responsibility, sets Council's future direction. It captures the ideas, priorities and values of the community and is a plan that will guide the MidCoast over the coming years.

Vision

We are recognised as a place of unique environmental and cultural significance.
Our strong community connection, coupled with our innovative development and growing economy, builds the quality of life we value.

Values

- We value **our unique, diverse and culturally rich communities**. Our diverse communities offer active and social opportunities, are safe and are places where we work together with a creative focus acknowledging our rich history and culture.
- We value **a connected community**. We are socially and physically connected with each other, by ensuring we have activities, facilities, roads, footpaths and technology that are upgraded and well maintained.
- We value **our environment**. Our natural environment is protected and enhanced, while we maintain our growing urban centres and manage our resources wisely.
- We value **our thriving and growing economy**. We are a place where people want to live, work and play, business is resilient and adaptable to change by utilising knowledge and expertise that supports innovation.
- We value **strong leadership and shared vision**. We work in partnerships towards a shared vision, that provides value for money and is community focused.

2018-2021 Delivery Program and 2019-2020 Operational Plan

The MidCoast Delivery Program and Operational Plan (DPOP) outlines Council's work commitment to the community and corresponds directly with the Community Strategic Plan.

The DPOP recognises the importance of population growth, listing it as a performance measure for the majority of sections.

The following DPOP points relate specifically to the Urban Land Monitor.

- Ensure there is sufficient land identified for future rezoning to cater for residential growth in appropriate locations.
- Monitor the supply of and demand for residential land to enable Council to program new land releases.

State Growth Aspirations – Hunter Regional Plan

The Hunter Regional Plan 2036 (HRP) is the key State government planning strategy and clearly defines population growth aspirations for the region and especially in centres. It also provides directions for the monitoring and delivery of associated dwellings. The HRP guides the New South Wales Government's land use planning priorities and decisions over the next 20 years. Figure 3 depicts how the plan recognises strategic and local centres in the MidCoast.

HRP Vision

The leading regional economy in Australia with a vibrant new metropolitan city at its heart.

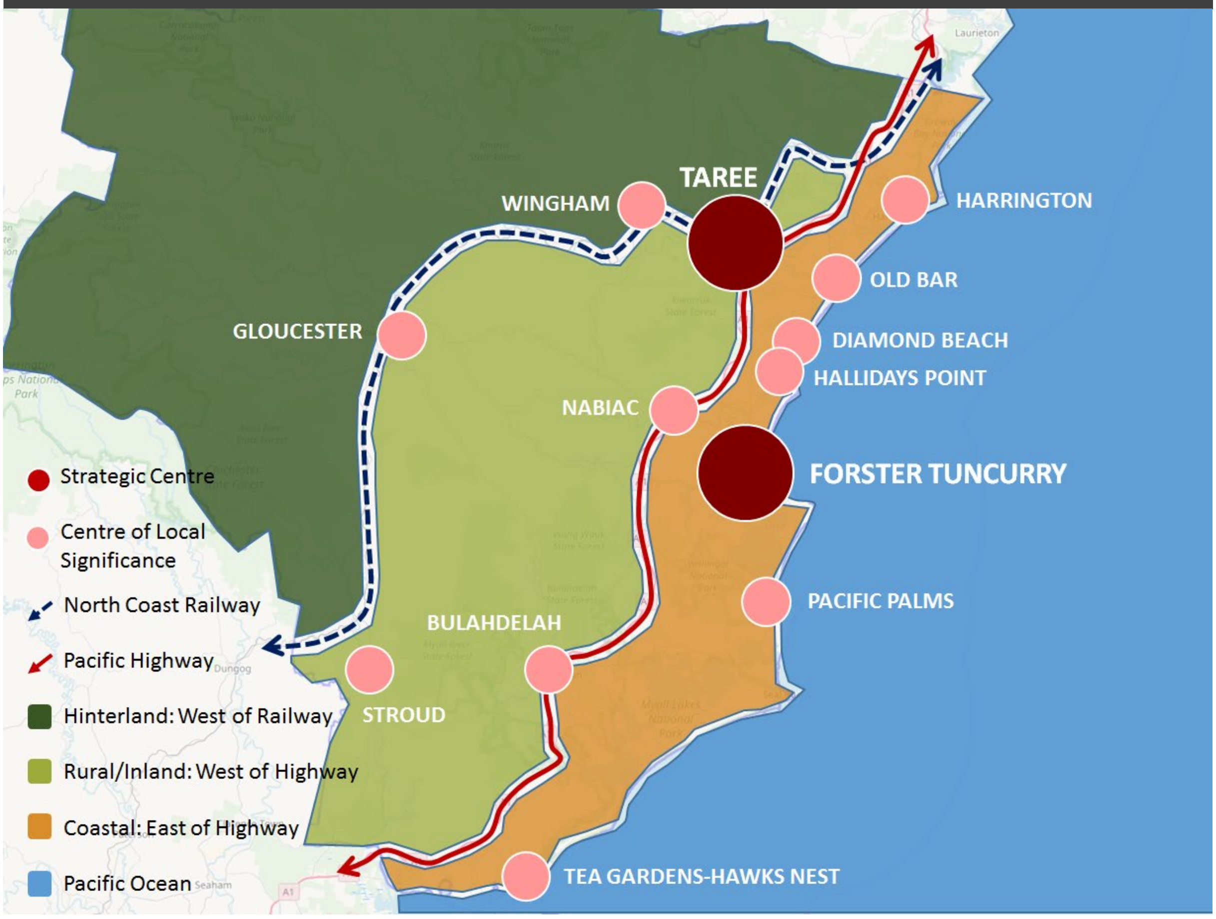
Part of the detailed vision statement relating to housing:

Greater housing choice is available in existing and new communities, close to jobs and services and well supported by public transport and walking and cycling options. More housing has reduced the upward pressure on house prices.

Relevant HRP Directions

- 22.1: Focus development to create compact settlements in locations with established services and infrastructure, and in existing towns and villages and sites identified in an endorsed regional or local strategy.
- 22.4: Create a well-planned, functional and compact settlement pattern that responds to settlement planning principles and does not encroach on sensitive land uses, including land subject to hazards, on drinking water catchments or on areas with high environmental values.
- 23.1: Concentrate growth in strategic centres, local centres and urban renewal corridors to support economic and population growth and a mix of uses.
- 25.1: Establish and implement an Urban Development Program to develop data on existing zoned land supply and its servicing status, monitor dwelling production rates, and coordinate the staged release and rezoning of land.

Figure 3: Hunter Regional Plan Centre Classification



Demographics

General trends

Some interesting trends about the MidCoast community are listed below.

- 18-24 year olds are leaving the area. Most move to Newcastle or Armidale for education and work.
- Nationally, immigrants contribute significantly to population growth, however in the MidCoast many of our immigrants have been in Australia for longer than 20 years.
- MidCoast has the second oldest median age (52yrs) in Australia and the oldest in NSW.
- Tea Gardens-Hawks Nest and Tuncurry are ranked as the two oldest statistical areas in Australia with a median age of 61.6 and 60.7 respectively.
- The suburb of 'Bushland' in Taree is the tenth most disadvantaged statistical area in NSW (according to Socio-Economic Indexes for Areas – SEIFA).

Population 2016

The MidCoast population has grown from 88,818 (2011) to 91,958 (2016) being an increase of 3,140 people and 0.69% cumulative growth rate. This is compared to a NSW average of 1.57% and a national average of 1.7% (for 2011-2016).

As shown in Figure 4, in 2016 Forster-Tuncurry and Taree are by far the largest centres within the MidCoast, followed by the centres of Wingham and Old Bar. Tea Gardens-Hawks Nest and Hallidays Point also have substantial community populations and these are followed in size, by Harrington and Gloucester.

Growth rates

Broadly, there are four different regional markets on the MidCoast as illustrated in Figure 5.

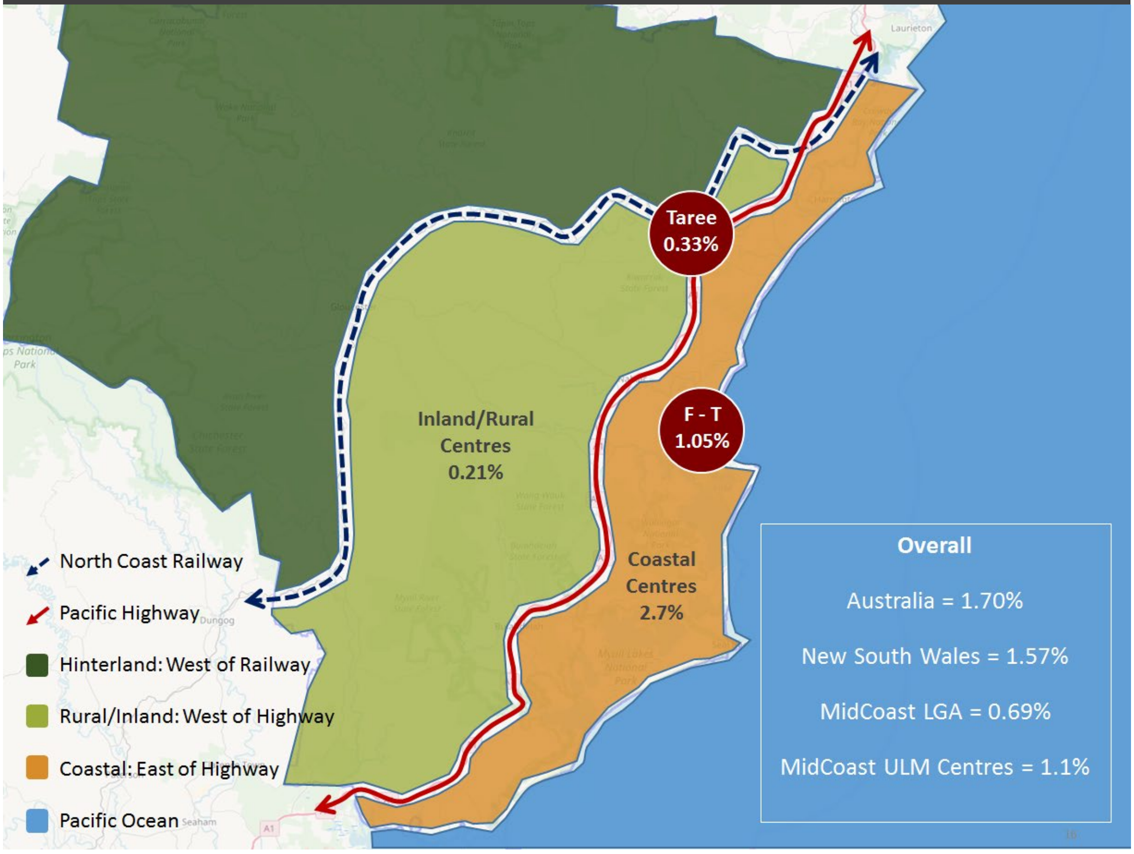
1. *Taree*: the major strategic centre, supported by significant infrastructure and services, which is experiencing below average growth (0.33% from 2011 and 0.58% from 2001).
2. *Forster-Tuncurry*: the historic tourist hub, supported by coastal amenity and facilities, which is experiencing above average growth (1.05% from 2011 and 0.70% from 2001).
3. *Rural Centres*: with an agricultural/country lifestyle focus, experiencing a low average growth (0.21% from 2011).
4. *Coastal Centres*: with a beach lifestyle/tourist focus, experiencing high average growth (2.7% from 2011).

The highest centre growth rates all occur in the coastal area as listed below:

- Harrington: 5.11% from 2011 (and 4.91% from 2001)
- Hallidays Point: 3.74% from 2011
- Smiths Lake: 2.79% from 2011 (and 2.07% from 2001)
- Tea Gardens-Hawks Nest: 2.18% from 2011
- Old Bar-Wallabi Point: 1.28% from 2011 (and 2.33% from 2001)

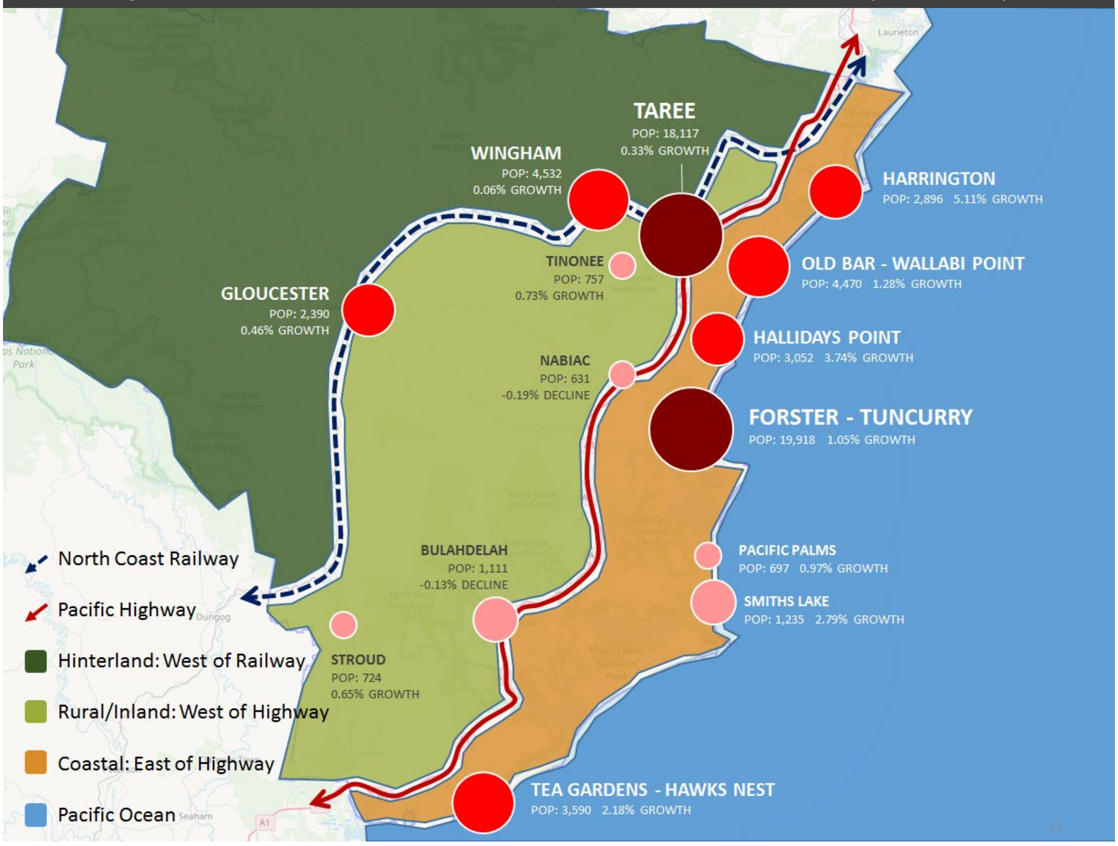
Note that 2001 data is not available for all centres.

Figure 4: Overall Growth Rate Comparison



Source: Calculated from 2011 and 2016 ABS census

Figure 5: MidCoast Centres – 2016 Population and Growth Rate (2011-2016)



Source: Population data from 2016 ABS census and growth rates calculated from 2011 and 2016 ABS census

Holiday accommodation – vacancy rates

MidCoast currently has almost 2 million visitors each year, contributing $504 million to the local economy (Tourism Research Australia, LGA Profiles). This is split across the region broadly as follows: Great Lakes: 50%; Manning Valley: 34%; Gloucester: 9%; other: 7%.

Meeting holiday demand can have a significant impact on residential supply with additional accommodation required especially during peak holiday seasons in tourist hot spots. A summary is presented below that provides an overview of the main holiday locations in MidCoast and highlights the considerable impact this can have on actual dwelling supply, compared to population figures.

Largely due to their proximity to Sydney and Newcastle, the MidCoast southern coastal centres have a high proportion of holiday dwellings (compared to state and national averages).

In 2016, Pacific Palms had the largest vacancy rate (new and holiday homes) of 64%. Tea Gardens-Hawks Nest and Smiths Lake had vacancy rates above 35%. Other centres such as Hallidays Point, Harrington and Forster-Tuncurry also had vacancy rates of 20% or more.

	Vacancy Rate 2016	Dwellings 2016	Population 2016
Pacific Palms	64%	756	697
Tea Gardens-Hawks Nest	42%	2,736	3,590
Smiths Lake	41%	782	1,235
Hallidays Point	24%	1,692	3,052
Harrington	21%	1,617	2,896
Forster-Tuncurry	20%	10,783	19,918
Gloucester	14%	1,199	2,390
Stroud	11%	279	724
Australia	*11%*		
New South Wales	*10%*		
Old Bar-Wallabi Point	10%	2,032	4,470
Bulahdelah	10%	497	1,111
Taree	8%	7,764	18,117
Wingham	8%	1,902	4,532
Tinonee	5%	302	757
Nabiac	3%	238	631

Ownership

Land ownership has the potential to constrain development, particularly where a large portion of both undeveloped and urban release areas are held under one ownership.

Overall, the ULM centres have a diverse range of ownership for residential land with 209 parcels being owned by 179 different owners (86% diversity rate for ownership).

At the local level, ownership was identified as a potentially limiting factor for Taree and Wingham with one owner controlling over 31% and 49% of (undeveloped and potential) residential land respectively. Further detailed independent analysis would be necessary to determine the impact extent of this on residential land supply.

2036 Projections – population and dwellings

Projections overall

The following table compares the population projections outlined by the NSW Department of Planning, Industry and Environment (DPIE) in the *Hunter Regional Plan 2036* (HRP), the Profile.id data for MidCoast and the Urban Land Monitor centres.

Key observations are listed below.

- Profile.id estimates the population in 2036 to be 113,147 people, an increase of 21,189 people and 1.03% cumulative growth rate from 2016. This is in the context of the MidCoast population growing from 88,818 (2011) to 91,958 (2016); being an increase of 3,140 people and 0.69% cumulative growth rate.
- While the ULM centres represent approximately 70% of the entire MidCoast population, they capture over 95% of the growth.
- The growth rate in the HRP is very low compared to the Profile.id data and there appears to be limited relationship between the number of additional dwellings (5,000) and the increased population (5,000 people) defined by the HRP.
- Almost 28,000 people lived outside the main MidCoast centres in 2016. The rural areas and smaller villages that accommodate this population will continue to grow and develop. However, this will most likely be a slower rate than the main centres analysed in the ULM and therefore will require less strategic planning in the short term.

	Hunter Regional Plan (DPIE)	MidCoast (Profile.id/ABS)	ULM Centres (MCC)
2011			
Population	88,800	88,818	60,719 (68% of MC)
2016			
Population	91,250	91,958	64,120 (70% of MC)
Population increase since 2011	2,450	3,140	3,401
Growth rate since 2011	0.54%	0.69%	1.08%
Total dwellings	49,750	47,981	32,579
Vacancy rate	20%	15%	19%
2036			
Population	96,250	113,147	83,112 (73% of MC)
Population increase since 2016	5,000	21,189	18,992
Growth rate since 2016	0.27%	1.03%	1.29%
Total dwellings	54,750	60,270	45,644
Additional dwellings since 2016	5,000	12,289	13,065
Vacancy rate	20%	16%	21%

Projections per Centre

The projections below illustrate the potential population and number of dwellings for the ULM centres in 2036. The projections to 2036 are based on a centre's recent historical average growth rate (from 2011-2016). An additional 20% of the 2016-2036 population increase was added to give a high growth demand scenario.

Note that these are potential projections only and do not take into account the supply and environmental constraints that will be discussed later in this report. The projections in the ULM are a guide only and need to be reviewed as part of an Urban Development Program every 5 years, following the release of national census data.

Key observations of the population projections per centre are as follows.

- Forster-Tuncurry could have approximately 4,000 more people than Taree in 2036.
- For the first time, over a quarter of the MidCoast population could live in coastal towns. This is largely due to Hallidays Point, Tea Gardens-Hawks Nest, Old Bar and Harrington potentially doubling in population size. As a result, there could be more people living in coastal towns than in Taree or in Forster-Tuncurry.
- Wingham could potentially go from being the third largest centre in 2016 to the seventh largest in 2036.
- Smiths Lake, a smaller coastal settlement, could have a comparable number of dwellings to Gloucester in 2036.

Figure 6 compares 2016 to 2036 population and dwelling projections.

Figure 7 geographically illustrates the population and dwelling projections for 2036.

	Historical Average Growth Rate 2011-2016	Population 2016	'Average Growth' Population Projection 2036	'Average Growth' Population Increase 2016-2036	'High Growth' Population Projection 2036	'High Growth' Population Increase 2016-2036
Strategic Centre						
Forster - Tuncurry	+1.05%	19,918	24,548	4,630	25,474	5,556
Taree	+0.33%	18,117	19,355	1,238	19,603	1,486
Rural Centre						
Wingham	+0.06%	4,532	4,624	92	4,642	110
Gloucester	+0.46%	2,390	2,619	229	2,665	275
Bulahdelah	- 0.13%	1,111	1,133	22	1,138	27
Tinonee	+0.73%	757	874	118	899	142
Stroud	+0.65%	724	824	100	844	120
Nabiac	- 0.19%	631	644	13	646	15
Coastal Centre						
Old Bar - Wallabi Pt	+1.28%	4,470	5,762	1,292	6,021	1,551
Tea Gardens - Hawks Nest	+2.18%	3,590	5,526	1,936	5,914	2,324
Hallidays Point	+3.74%	3,052	6,362	3,310	7,024	3,972
Harrington	+5.11%	2,896	7,850	4,954	8,841	5,945
Smiths Lake	+2.79%	1,235	2,143	908	2,325	1,090
Pacific Palms	+0.97%	697	846	149	876	179
Total	**+1.1%**	**64,120**	**83,112**	**18,992**	**86,910**	**22,790**

Figure 6: Population and Dwelling Comparison 2016 to 2036

Source: Population and private dwelling data from 2016 ABS Census

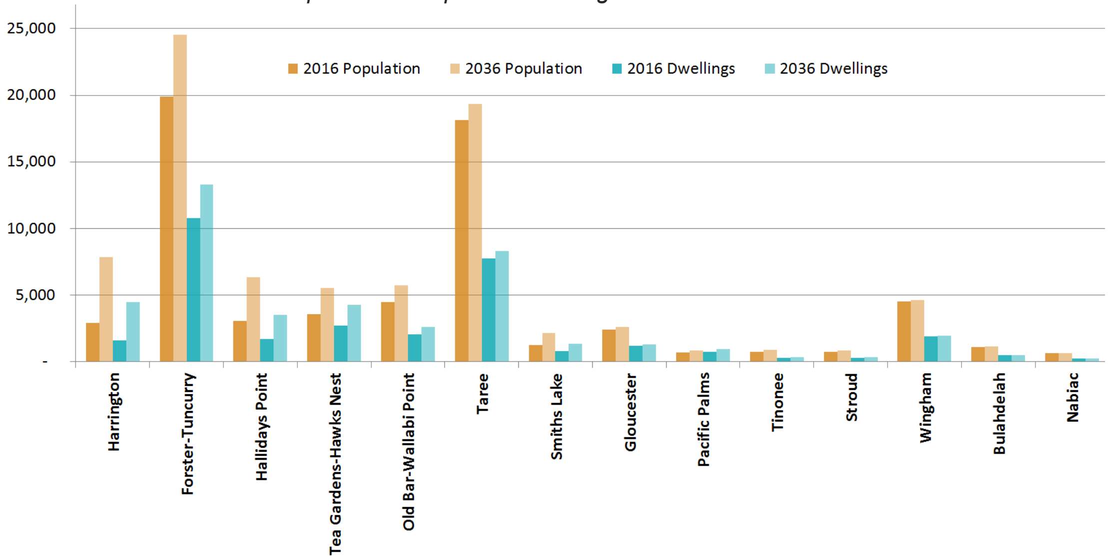
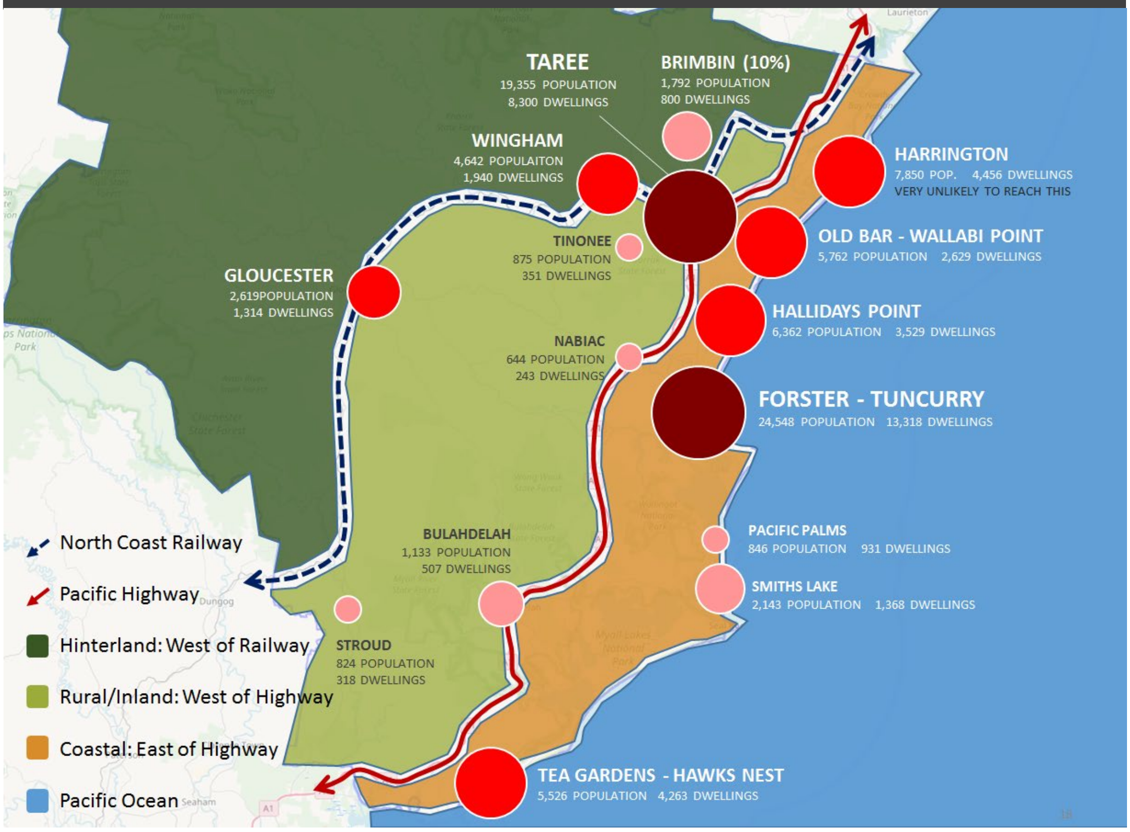


Figure 7: 2036 Growth Potential – Total Population and Total Dwellings



4 Supply and Demand Overview

Overall, the entire MidCoast and the four regional markets (Taree, Forster-Tuncurry, Rural Centres and Coastal Centres) have adequate supply to meet historic average growth rates until 2036.

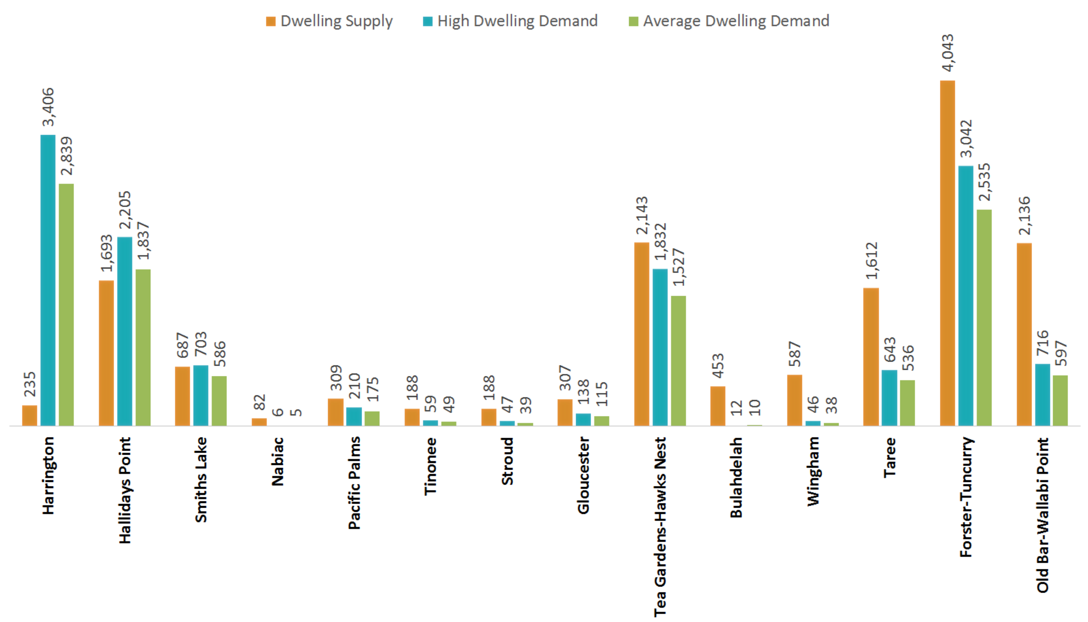
However, examining centres at a local level highlights the following considerations.

- Although Forster-Tuncurry currently has adequate supply, this is extremely dependent on the development of North Tuncurry (approximately 1,900 dwellings), as many future residential sites in Forster have ownership, contamination or other constraints.
- There is only a short term (approximately 10 year) supply of R4 High Density Residential zoned land in Forster, which has historically accommodated the bulk of high-density residential and tourist accommodation for MidCoast.
- Harrington is the only major centre to have a significant land supply shortage. It has had the largest population growth of all centres (5.11% from 2011-2016 and 4.91% from 2001-2016). If Harrington continues to grow at this high growth rate or even at the average coastal growth rate (2.7%) it will exhaust dwelling supply between 2019-2021. Additionally, Harrington is nearing sewerage capacity and significant system upgrades would be required if growth continues. If greater supply is sought, this will need to be delivered through additional land release areas (currently severely constrained due to flooding) or higher residential densities.
- Hallidays Point and Smiths Lake have potential residential land supply shortages which should be monitored closely over the next 10 years.
- It is important to monitor development at Brimbin (an approved new town north of Taree) which has the potential to deliver 8,000 residential lots and could have a considerable impact on the housing demand and supply for the northern MidCoast region. For example, the growth rates of inland centres such as Taree, Wingham and Tinonee could potentially experience a decline as land is released for development, unless Brimbin creates a new 'market'. Potentially 10% (800 lots) will be developed by 2036.

The following table and Figure 8 provides an overview of dwelling supply and demand for the MidCoast centres analysed in this report.

	"Average" Dwelling Demand 2016-2036	"High" Dwelling Demand 2016-2036	Dwelling Supply 2016-2036
Strategic Centre	3,071	3,685	5,855
Forster-Tuncurry	2,535	3,042	4,243
Taree	536	643	1,612
Rural Centre	257	308	1,805
Wingham	38	46	587
Gloucester	115	138	307
Bulahdelah	10	12	453
Tinonee	49	59	188
Stroud	39	47	188
Nabiac	5	6	82
Coastal Centre	7,561	9,073	7,528
Old Bar-Wallabi Point	597	716	2,136
Tea Gardens-Hawks Nest	1,527	1,832	2,143
Hallidays Point	1,837	2,205	1,693
Harrington	2,839	3,406	235
Smiths Lake	586	703	687
Pacific Palms	175	210	309
MidCoast Centres Total	**10,888**	**13,065**	**14,863**

Figure 8: Dwelling Supply and Demand Comparison Overview



5 Future Directions and Implementation

Next Steps for the Urban Land Monitor

The Urban Land Monitor will be reviewed following exhibition and adoption of the Housing Strategy and other land use plans to reflect zone and development standard recommendations that may affect population projections.

The Monitor will then be reviewed every five years following the publication of ABS Census Data, as part of an Urban Development Program. Reviews will therefore be scheduled for:

- 2022 (with ABS 2021 Census data);
- 2027 (with ABS 2026 Census data); and,
- 2032 (with ABS 2031 Census data).

Directions for the Housing Strategy and MidCoast LEP

A MidCoast Housing Strategy is being developed to support the consolidation of the Greater Taree, Great Lakes and Gloucester Local Environmental Plans into one MidCoast LEP.

The findings from the Urban Land Monitor have informed the following main directions for the Housing Strategy:

1. Take into account the supply and demand projections of the ULM when rationalizing residential zones.
2. Examine potential for additional R4 High Density Residential zoned land in Forster to provide additional accommodation for residents, investors and tourists.
3. Examine potential for increased residential densities in Harrington to respond to the limited land and dwelling supply.

The Monitor will be reviewed following exhibition of the Housing Strategy to reflect zone and development standard recommendations that may affect population projections.

The updated ULM may then be provided to the NSW Department of Planning, Industry and Environment as supporting information for the Planning Proposal to be lodged with the consolidated MidCoast Local Environmental Plan.

Directions for Strategic Planning in General

The following broad directions are recommended for strategic planning in the MidCoast in order to address future supply and demand challenges.

1. In the next 5 years (by 2023) prioritise visioning and local planning strategies for locations with significant supply-demand stress such as Harrington and Hallidays Point, to determine extent and location/type of future growth.
2. Prioritise identification of any land use controls that could support growth in rural towns, where historic population growth is minimal or in decline.
3. In the next 10 years (by 2028) undertake or update visioning and local planning strategies for localities with low-moderate supply-demand stress such as Tea Gardens-Hawks Nest, Smiths Lake and Pacific Palms, to determine extent and location/type of future growth.

Directions for Planning Proposals (to rezone land to residential)

The following direction relate to the rezoning of land for residential purposes.

1. The ULM will be used to assist in determining the strategic merit of any Planning Proposal being considered for the MidCoast.

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Appendix A: Detailed Centres Analysis

Strategic Centres

MidCoast has two strategic centres. Taree provides a service and employment function, while Forster-Tuncurry has a tourism and retirement living focus. The housing demands and markets are very different as outlined below.

Taree

Taree (including Cundletown) provides a range of functions being a focus for employment, services and transport, in addition to housing.

The supply and demand assessment is provided below.

Population and housing characteristics

- population: 18,117 (2016); 17,820 (2011)
- private dwellings: 7,764 (2016)
- population growth (2011-2016): 0.33%/ year
- household size: 2.3 people/household
- household type: 79.5% houses, 19.3% townhouses/units
- vacancy rate: 8%

(ABS data source: Taree UCL)

Supply	Est dwellings
Undeveloped residential land	652
Urban release areas	960
Total	**1,612**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.33%)	19,355	1,238	27	**536**
High growth (Average growth + 20%)	19,603	1,486	32	**643**

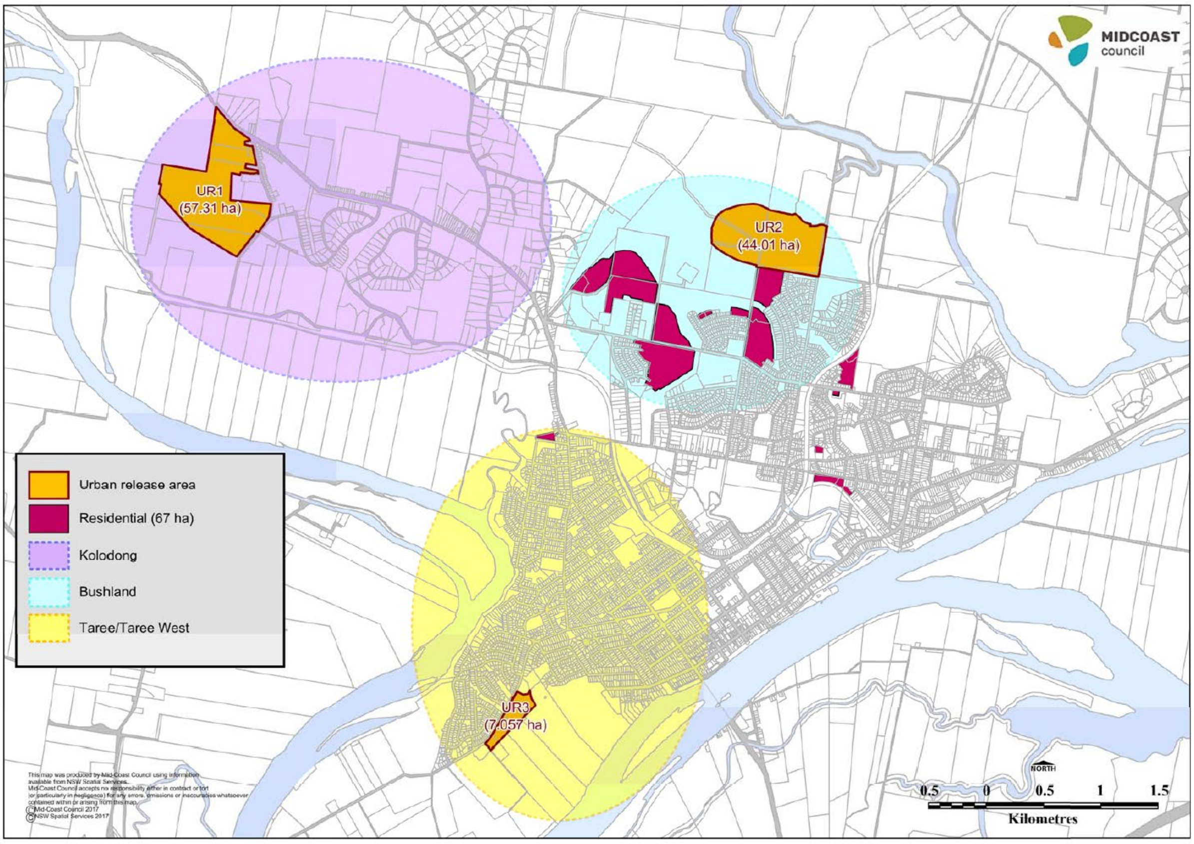
Key findings

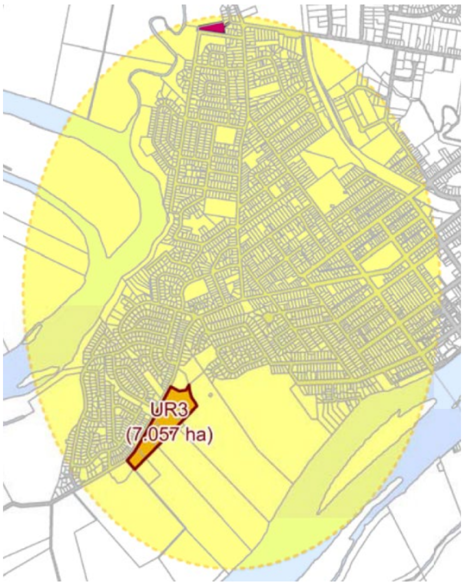
- There is sufficient land identified for future residential development for 20+ years.
- Houses remain the dominant dwelling type, however there had been a 3% increase in the number of units/townhouses from 1991 to 2016, averaging at around 25 units/year (Population id.). There are sufficient redevelopment sites to accommodate this growth. While the Greater Taree LEP identifies locations for increased residential intensity (increased height limits), much of the unit development occurred outside these areas.
- There has been a strong growth in aged care facilities in Taree over the last 12 years which achieves a density of approximately 50 units/ha. Given our aging population, we need to continue to accommodate aged care. It is likely that land around Kolodong and Bushland will accommodate much of this future growth.
- If suitable land is not available in Taree, much of the growth moves to the coastal regions, particularly Old Bar, which is currently experiencing increased growth.
- Taree has a high level of social housing (8.4%) compared to NSW (4.4%) and the remainder of our urban settlements (generally 3.0%). Given Taree has access to many of the social services this can be considered appropriate. However, there are areas of social disadvantage in some of Taree's suburbs which have limited growth. The Bushland statistical area is the 10th area of most disadvantage in NSW (according to the SEFA Index).
- The new town of Brimbin has the potential to offer a new housing market close to Taree. While Brimbin was included in a residential zone in 2015, a masterplan is only currently being developed for the new town, prior to subdivision consent being able to be provided. Brimbin has potential to provide up to 8,000 residential lots.

Detailed Taree Analysis

Residential catchments

Three residential catchments were identified for Taree being Taree/Taree West, Bushland and Kolodong as shown below.



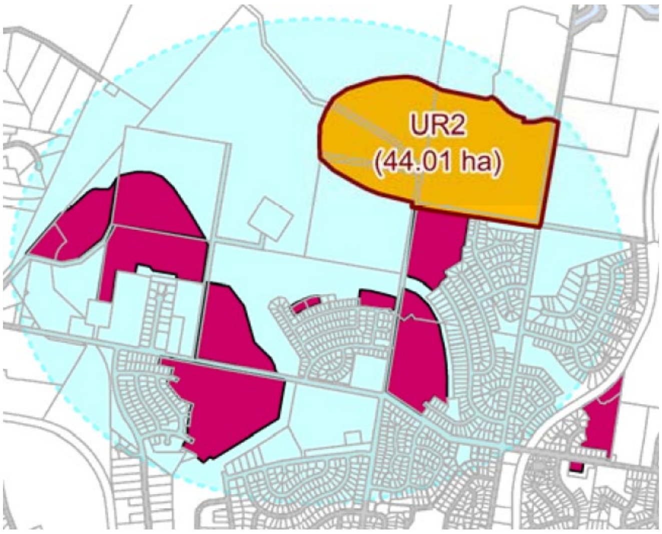


The Taree/Taree West catchment (to the right) is an area of high demand. Many of the subdivisions registered in early 2000s have been almost fully developed.

The area of greatest success was in John Hall Drive where the survey was registered in 2005 and was almost fully developed over an eight-year timeframe. The aerials (below) show the extent of development.

The assessment identified that the Taree/Taree West urban release area 3 is a priority area for rezoning to accommodate residential growth in this catchment.

The Bushland catchment (below) is an area of low demand.

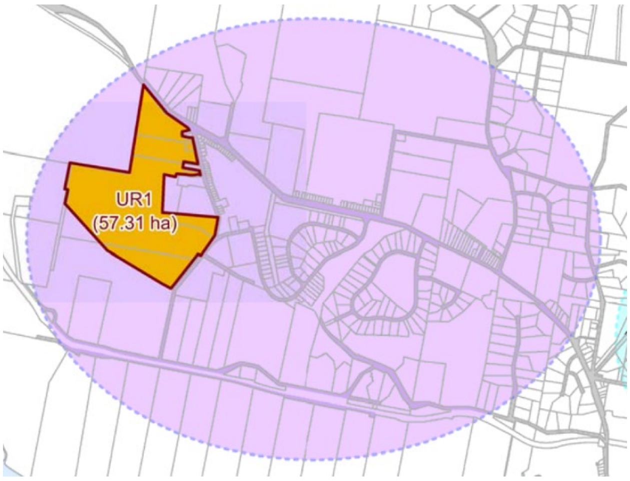


Many of the subdivisions approved in the Bushland catchment in the early 2000s still have large undeveloped areas. For example: Parklands Estate survey plan was registered in 1995 and there are still a large number of lots to be developed. The aerials (below) show the extent of development.

The assessment identified that this catchment has the largest area to cater for growth, however a number of factors have limited the growth making it a catchment of low demand. As a result, urban release area 2 was considered a low priority in terms of when it should proceed to the rezoning stage.

The Kolodong catchment (to the right) in comparison, provides a new housing market. There is an aged care focus in this catchment to the north of Wingham Road.

The development of urban release area 1 (known as Kolodong Estate) is seen as a priority to provide a new housing market for Taree.



Forster-Tuncurry

The twin townships of Forster and Tuncurry are located in a coastal area of high amenity and have a focus on tourism and aged care.

The supply and demand assessment is provided below.

Population and housing characteristics

- population: 19,918 (2016); 18,904 (2011)
- private dwellings: 10,783 (2016)
- population growth (2011-2016): 1.05%/year
- household size: 2.1 people/household
- household type: 63.1% houses, 34.4% townhouses/units
- vacancy rate: 20%

(ABS data source: Forster-Tuncurry SUA)

Supply	Unit	House	Est dwellings
Undeveloped Residential Land	636	1,077	1,713
Urban release areas	0	2,030	2,230
Redevelopment Potential in R3	50	0	50
Redevelopment Potential in R4	250	0	250
Total	936	3,107	**4,043**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (1.05%)	24,548	4,630	127	**2,535**
Detached dwellings (63.1%)				1,599
Townhouses/units (34.4%)				872
High growth (Average growth + 20%)	25,474	5,556	152	**3,042**
Detached dwellings (63.1%)				1,919
Townhouses/units (34.4%)				1,046

Key findings

- Overall, the potential supply estimate of 4,043 dwellings is adequate to meet the high growth demand estimate for 2036 of 3,042 dwellings. However, this is extremely dependent on the development of North Tuncurry (approximately 1,900 dwellings), as many sites in Forster have ownership, contamination or other constraints.

- In terms of dwelling types, the potential housing supply (3,107) should easily meet demand, while the unit supply (936) is much closer to the average demand estimate (872) and high demand estimate (1,046).

- The R4 High Density Residential zone in Forster caters for both the tourism market and permanent residents. This zone has sufficient short-term redevelopment supply but is constrained in the medium to long term. It is important to examine areas of potential future expansion and any factors that would support that growth.

- The R3 Medium Density Residential zone in Tuncurry and Forster is under-developed. These areas have the potential to cater for the unit demand, especially in the context of a slightly constrained R4 Zone area. Consideration needs to be given to factors which could promote growth and redevelopment of these R3 areas.

➢ High demand for retirement and aged care living should be able to be met within the existing capacity of the R2 Low Density Residential and R3 Medium Density Residential zones, Undeveloped Residential Land and Urban Release Areas.

Note: state planning controls allow for these land uses within urban zones and may allow for a higher density of development than existing zones in local plans. However, the availability of parcels of land that are large enough to accommodate this form of residential development may be a future constraint.

Detailed Forster-Tuncurry Analysis

Market Focus 1: Residents

There has been a scattering of infill residential development in the R2 and R3 residential zones across Tuncurry and Forster in the period 2003-2014 (refer figure below).

More significant residential estate developments have progressed in Forster in the 2003-2014 period at the following locations:

➢ Fig Tree Court

➢ Robina Grove

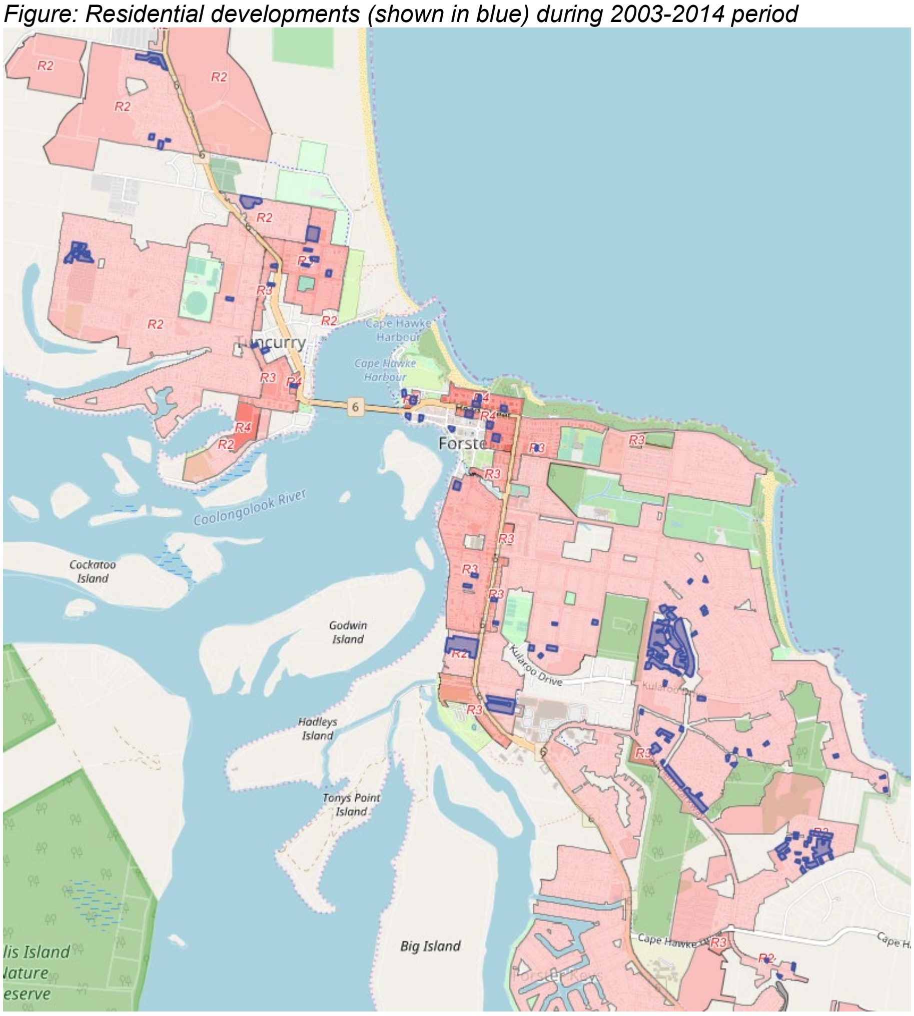
➢ Pioneer Drive

➢ Akala Avenue

➢ Hesper Drive/Southern Parkway

Take up rates of residential land releases has been rapid in Forster-Tuncurry. Currently (2018) there are very few subdivided residential lots that are vacant.

Figure: Residential developments (shown in blue) during 2003-2014 period



Market Focus 2: Visitors

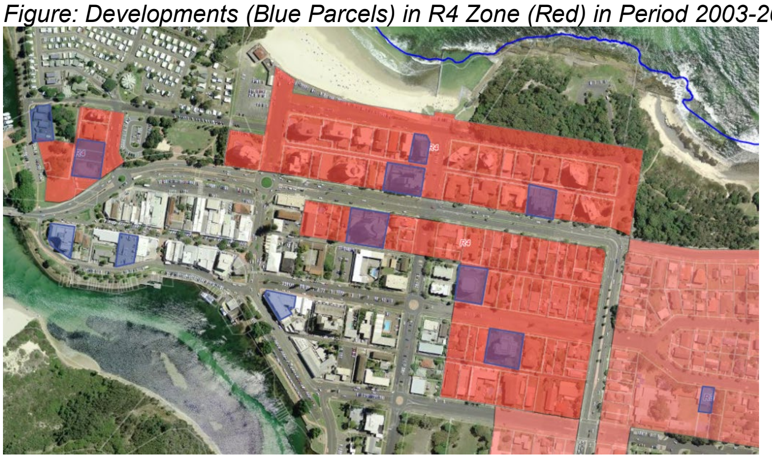
Historically, 34% of residential product in Forster-Tuncurry is unit type development (compared to 63% separate houses). This is very high for the MidCoast and in part reflects the high need for tourist accommodation. The main zones where this development type is possible is the R4 High Density and R3 Medium Density Residential Zones.

R4 High Density Zone in Forster

There are approximately 87 allotments within the R4 High Density Zone of Forster (note that the main R4 zoned land in Tuncurry is captured in Undeveloped Residential Land allocation).

Aerial photography analysis indicates that during the period 2003-2014, approximately 10% of lots were redeveloped into high density residential (refer figure below). This yielded approximately 150 units over 11,000m^2 of combined land area (the hotel on the corner of North and West Streets is excluded in this calculation).

Figure: Developments (Blue Parcels) in R4 Zone (Red) in Period 2003-2014



A macro analysis of this zone indicates that approximately 18,000m^2 of combined land may have short term redevelopment potential (refer figure below). Note that this analysis took into account land that had already been significantly developed or that has a current development approval. If future short-term development has a similar yield to that noted in the period from 2003-2014, it would deliver approximately <u>250 units</u>.

Figure: Potential Short-term Redevelopment Opportunities (Hatched Parcels) in R4 Zone

This analysis indicates that over the next 10 years (short term) there are potential redevelopment opportunities. However, looking to the medium and long term, these opportunities will become increasingly limited and constrained.

The R3 Medium Density Residential Zone in Forster and Tuncurry

Redevelopment within the R3 zones of Forster-Tuncurry over the period 2003-2014 has been minimal. Figures below show new developments (blue parcels) during this period.

The R3 Zones in Forster-Tuncurry allow for a floor space ratio of 1:1 and maximum building height of 12m. However, the majority of current sites within the R3 Zone do not fully take advantage of these allowances and may be considered as under-developed.

If a greater level of redevelopment is sought within this area, this trend should be analysed and measures/changes put in place to encourage development. Based on present trends, approximately <u>50 additional units</u> could be anticipated within these R3 areas by 2036.

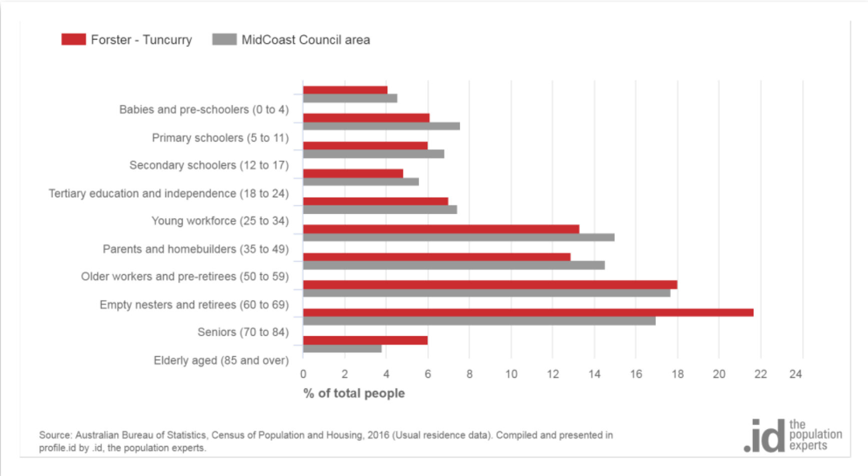
Figure: Tuncurry R3 Zone Redevelopments 2003-14

Figure: Forster R3 Zone Redevelopments 2003-14

Market Focus 3: Retirement and Aged Care

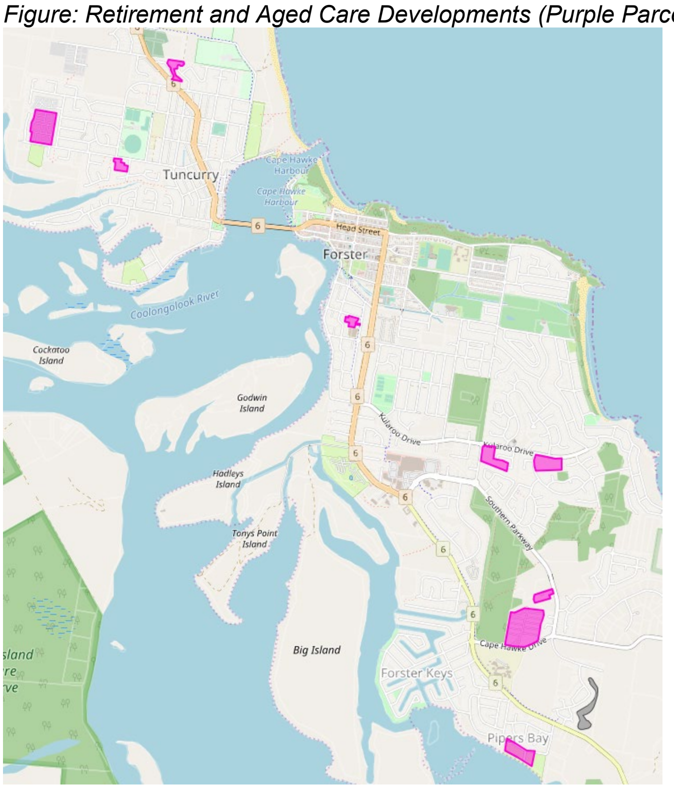
Forster-Tuncurry has a higher proportion of 60+ residents than the MidCoast area generally. Overall, 16.2% of the population was aged between 0 and 17, and 45.7% were aged 60 years and over, compared with 19.0% and 38.5% respectively for MidCoast Council area.

Figure: Age Structure 2016



There are a number of residential developments existing in Forster-Tuncurry that cater specifically to aged care and retirement living. The conversion of caravan parks to low cost retirement accommodation is also a trend in the area.

Figure: Retirement and Aged Care Developments (Purple Parcels)



Developments looking to meet this growing demand for aged care and residential living are expected to increase over the next 20 years, both in traditional retirement villages and in ‘vertical’ retirement villages.

Rural Centres

The rural centres provide an economic and service hub for our extensive rural lands. The shops, schools and services provided in these towns are crucial for our rural community. The growth of these centres is very limited with an average of 0.21% annual growth from 2011-2016.

In terms of housing supply, there is sufficient land identified for residential growth to accommodate future demand.

Wingham

Wingham is the largest rural centre with a population of 4,532 people (ABS 2016). It provides a large commercial centre and employment lands. Heritage is a key attribute of Wingham's character.

The supply and demand assessment is provided below.

Population and housing characteristics

- population: 4,532 (2016); 4,518 (2011)
- private dwellings: 1,902 (2016)
- population growth (2011-2016): 0.06%/year
- household size: 2.3 persons/household
- household type: 90.2% houses, 8.8% townhouses/units
- vacancy rate: 8%

(ABS data source: Wingham UCL)

Supply	Est dwellings
Undeveloped Residential Land	229
Urban release areas	358
Total	**587**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.1%)	4,624	92	1.9	**38**
High growth (Average growth + 20%)	4,642	110	2.3	**46**

Note that 0.1% growth rate has been used as a default minimum where necessary.

Key findings

- While there appears to be sufficient land identified for future residential development for 20+ years, consideration needs to be given to the ownership of the land to be developed. In Wingham almost 49% of residential zoned land is in one ownership which may impact upon land release and the sequencing of development.
- Houses remain the dominant dwelling type, however there had been a slight increase in the number of units/townhouses from 1991 till 2016 of around 3%. There are sufficient redevelopment sites to accommodate development for townhouses/units.
- There has been a trend to subdivide lots in Wingham well above the minimum lot size of 450m^2, typically 800m^2. This lot size is characteristic of a rural centre.
- The heritage character of Wingham is not only typified by the housing but the lot sizes and road layout. Consideration needs to be given to how these elements can be retained through future planning controls.

Gloucester

Gloucester is the town centre for the Gloucester region and has a population of 2,390 (ABS 2016). It provides a large commercial centre and employment lands. Heritage and views to The Bucketts are key attributes of Gloucester's character.

The supply and demand assessment is provided below.

Population and housing characteristics

- population: 2,390 (2016); 2,336 (2011)
- private dwellings: 1,199 (2016)
- population growth (2011-2016): 0.46%/year
- household size: 2.1 persons/household
- household type: 88.7% houses, 8.1% townhouses/units
- vacancy rate: 14%

(ABS data source: Gloucester UCL)

Supply	Est dwellings
Undeveloped residential land	21
Urban release areas	286
Total	**307**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.46%)	2,619	229	6	**115**
High growth (Average growth + 20%)	2,665	275	7	**138**

Key findings

- There is sufficient land identified for future residential development for 20+ years.
- The recent rezoning of land south of the town centre and adjoining existing rural residential areas, known as Gloucester River Run, will increase the area of undeveloped residential land and will cater for the anticipated growth of Gloucester.
- Houses remain the dominant dwelling type, with only a minimal increase in the number of units/townhouses from 1991 till 2016 of around 1%.
- There is a potential oversupply of land zoned for business in the Gloucester centre. If that surplus business land is rezoned to accommodate residential land uses it will further contribute to housing supply for the area and may be appropriate for a higher density of development given its proximity to services and facilities.
- Gloucester's population can be strongly influenced by mining operations.

Bulahdelah

Bulahdelah provides an important entry into the Myall Lakes. Now bypassed by the Pacific Highway, Bulahdelah is still in a transition period.

The population in Bulahdelah is 1,111(ABS, 2016) which was a slight decrease from 1,118 in 2011.

Population and housing characteristics

- Population: 1,111 (2016); 1,118 (2011)
- private dwellings: 497 (2016)
- population growth (2011-2016): -0.13%/year
- household size: 2.2 persons/household
- household type: 89.5% houses, 4.7% townhouses/units
- vacancy rate: 10%

(ABS data source: Bulahdelah UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	253
Urban release areas	200
Total	**453**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.1%)	1,133	22	0.5	**10**
High growth (Average growth + 10%)	1,138	27	0.6	**12**

Note that 0.1% growth rate has been used as a default minimum where necessary.

Key findings

- There is sufficient land identified for future residential development for 20+ years.
- There are some constraints to servicing land on the eastern side of the Pacific Highway.
- Houses remain the dominant dwelling type (89.5%), with 4.7% being units/townhouses. There are sufficient redevelopment sites to accommodate development for townhouses/units.
- The minimum lot size is 700m^2 provides for a more rural town residential footprint.

Tinonee

Tinonee is in close proximity to Taree, adjoins the Manning River, and has views to the escarpment.

Tinonee has had a slight population increase over the last 5 years of 0.73% per year (approximately 5 people per year). This growth may be attributed to an increase in young families as it has one of the highest number of people per household in the MidCoast (2.5).

Population and housing characteristics

- Population: 757 (2016); 730 (2011)
- private dwellings: 302 (2016)
- population growth (2011-2016): 0.73% per year
- household size: 2.5 people/household
- household type: 94.1% houses, 4.8% townhouses/units
- vacancy rate: 5%

(ABS data source: Tinonee UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	39
Urban release areas	149
Total	**188**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.73%)	875	118	2	**49**
High growth (Average growth + 20%)	899	142	3	**59**

Key findings

- There is sufficient land identified for future residential development for 20+ years.
- Tinonee is dominated by houses (94%).
- Potential residential areas to the south of The Bucketts Way have been discouraged given the increased traffic using this regional road and separation to the village. These sites are better suited for large lot residential style development. There may be a need to examine the residential potential of lands to the west of the existing urban area to cater for demand for separate dwellings.

Stroud

Stroud is a historic rural town.

It has maintained a reasonable growth rate of 0.65% for a rural community, (less than 5 people per year). Like Tinonee, Stroud's growth may be attributed to an increase in young families as it has one of the highest number of people per household in the MidCoast (2.5).

Population and housing characteristics

- population: 724 (2016); 701 (2011)
- private dwellings: 279 (2016)
- population growth (2011-2016): 0.65%/year
- household size: 2.5 people/household
- household type: 98% houses, 2% townhouses/units
- vacancy rate: 11%

(ABS data source: Stroud UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	188
Urban release areas	0
Total	**188**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.65%)	824	100	2	**39**
High growth (Average growth + 20%)	844	120	2.4	**47**

Key findings

- There is sufficient land identified for future residential development for 20+ years.
- Stroud is dominated by houses (98%).
- Stroud has a strong historical character that needs to be maintained. This has been assisted by maintaining 700sqm minimum lots fronting the main street within the historic business centre and 1000sqm blocks in the remainder of the village.

Nabiac

Nabiac adjoins the Pacific Highway providing easy access to other centres north and south. Originally divided across two Council areas, it is now located wholly in the MidCoast Council area.

Population and housing characteristics

- Population: 631 (2016); 637 (2011)
- private dwellings: 238 (2016)
- population growth (2011-2016): -0.19%/year
- household size: 2.5 people/household
- household type: 100% houses, 0% townhouses/units
- vacancy rate: 3%

(ABS data source: Nabiac UCL)

While the population has declined over the last 5 years (6 people), Nabiac maintains a high number of young families as it has one of the highest number of people per household in the MidCoast (2.5).

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped Residential Land	2
Urban release areas	80
Total	**82**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.1%)	644	13	0.25	**5**
High growth (Average growth + 20%)	646	15	0.3	**6**

Note that 0.1% growth rate has been used as a default minimum where necessary.

Key findings

- There is sufficient land identified for future residential development for 20+ years.
- Detached houses are the predominant dwelling type available at Nabiac. There are a small number of dual occupancy/villa developments east of the oval.
- Flooding, waterways and the Pacific Highway constrain the future development/expansion of Nabiac.

Coastal Centres

Coastal centres have experienced substantial growth (2.51% from 2011), offering a coastal lifestyle/tourist focus.

Old Bar

Old Bar (including Wallabi Point) is the largest of the coastal centres with a population of 4,470. Old Bar is close to Taree and has large sites zoned residential. As a result, the population has been increasing (2.28% from 2001-2016 and 1.28% from 2011-2016).

Population and housing characteristics

- population: 4,470 (2016); 4,195 (2011)
- private dwellings: 2,032 (2016)
- population growth (2011-2016): 1.28%/year
- household size: 2.3 persons/household
- household type: 76% houses, 21% townhouses/units
- vacancy rate: 10%

(ABS Data source: Old Bar UCL and Wallabi Point UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	1,757
Urban release areas	379
Total	**2,136**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (1.28%)	5,762	1,292	30	**597**
High growth (Average growth + 20%)	6,021	1,551	36	**716**

Key findings

- Land release programs commenced in the early 2000s provide sufficient lands to cater for the future growth of Old Bar and Wallabi Point until 2036.
- Houses remain the dominant dwelling type, however there has been a significant increase in the number of units/townhouses (1991-2016) from 12% to 21%. Options to accommodate continued growth in townhouses/units need to be explored.
- Coastal erosion is a key consideration/constraint for future development.

Tea Gardens - Hawks Nest

Tea Gardens - Hawks Nest is the second largest coastal settlement with a population of 3,590. There has been significant growth with people migrating from Newcastle and Sydney.

Tea Gardens - Hawks Nest is ranked as the oldest statistical area (SA2) in Australia with a median age of 61.6.

Population and housing characteristics

- population: 3,590 (2016); 3,223 (2011)
- private dwellings: 2,736 (2016)
- population growth (2011-2016): 2.18%/year
- household size: 2 people/household
- household type: 83% houses, 16% townhouses/units
- vacancy rate: 42%

(ABS data source: Tea Gardens UCL and Hawks Nest UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	1,443
Urban release areas	700
Total	**2,143**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (2.18%)	5,526	1,936	76	**1,527**
High growth (Average growth + 20%)	5,914	2,324	92	**1,832**

Key findings

- There appears to be sufficient land available to meet the needs of the growing population.
- A number of sites have been included in the R3 Medium Density Residential zone, but development has not yet been undertaken.
- A planning proposal north of Hawks Nest did not proceed and there are numerous environmental constraints to be considered. No lots were estimated for this urban release area, previously identified in the Mid North Coast Regional Strategy.

Hallidays Point

Hallidays Point includes the villages of Diamond Beach, Red Head, Black Head, Hallidays Point and Tallwoods. These five coastal villages have seen significant growth. Planning has identified the need to keep these settlements as individual villages. These villages are characterised by young families with the persons/household being 2.3.

Population and housing characteristics

- population: 3,052 (2016); 2,540 (2011)
- private dwellings: 1,692 (2016)
- population growth (2011-2016): 3.74% per year
- household size: 2.3 people/household
- household type: 76% houses, 21% townhouses/units
- vacancy rate: 24%

(ABS data source: Hallidays Point UCL, Red Head UCL and Diamond Beach UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	1,109
Urban release areas	584
Total	**1,639**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (3.74%)	6,362	3,310	92	**1,837**
High growth (Average growth + 20%)	7,024	3,972	110	**2,205**

Key findings

- There is insufficient dwelling supply until 2036 for average growth or high growth scenarios.
- If continued growth is sought, planning for additional residential lands should take place over the next 5 years to ensure that demand can be met and supply addressed for 2036 and beyond.
- Houses remain the dominant dwelling type, however there has been an increase in the number of units/townhouses (1991-2016) from 5% to 21%. Much of this unit development can be attributed to Halliday Shores, a retirement village.
- Plans undertaken in the 1990s and 2000s identified the need to maintain separation between the five villages to maintain their individual character.

Harrington

Harrington has a current population of 2,896 (ABS, 2016). It is a popular coastal location with a distinctive older area and newer Harrington Waters Estate. Harrington is a popular location for retirees.

The supply and demand assessment is provided below.

Population and housing characteristics

- population 2,896 (2016); 2,257 (2011)
- private dwellings: 1,617 (2016)
- population growth (2011-2016): 5.1% per year
- household size: 2.1 people/household
- household type: 81.8% houses, 14.1% townhouses/units
- vacancy rate: 21%

(ABS data source: Harrington UCL)

Supply	Est dwellings
Undeveloped residential land	220
Urban release areas	15
Total	**235**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (5.11%)	7,850	4,954	142	**2,839**
High growth (Average growth + 20%)	8,841	5,945	170	**3,406**

5.4.1 Key findings

- Harrington will run out of available residential land supply by 2019-2021 if it continues to grow at a very high growth rate (5.11% since 2011) or even at the average coastal growth rate (2.51% since 2011).
- Planning is required to determine the vision for Harrington and how much additional growth is wanted/needed and how this growth will be supported. There will be a need to examine increased residential densities due to flooding constraints limiting expansion.
- Houses remain the dominant dwelling type, however there has been an increase in the number of units/townhouses (1991-2016) from 8% to 14%. There is a need to examine how to accommodate this growth in townhouses/units.
- There are 3 caravan parks at Harrington which provide 126 dwellings for residents (ABS 2016).

Smiths Lake

Smiths Lake is an undulating lakeside settlement with high amenity and close proximity to beaches. It is dominated by young families having the highest number of people per household for the coastal centres (2.4). It is also a popular place for holiday homes (41% vacancy rate).

Population and housing characteristics

- population: 1,235 (2016); 1,076 (2011)
- private dwellings: 782 (2016)
- population growth (2011-2016): 2.79%/year
- household size: 2.4 people/household
- household type: 99.4% houses, 0.6% townhouses/units
- vacancy rate: 41%

(ABS data source: Smiths Lake UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	87
Urban release areas	600
Total	**687**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (2.79%)	2,143	908	29	**586**
High growth (Average growth + 20%)	2,325	1,090	35	**703**

Key findings

- There is sufficient dwelling supply until 2036 for average growth but there is a shortfall for the high growth scenario.
- If continued growth is sought, planning for additional residential lands should take place over the next 10 years to ensure that high growth scenarios can be met and to address supply beyond 2036. However, with surrounding bushland and hence high ecological value and bushfire hazard, expansion of the village may not be possible.
- The village is dominated by houses (99.4%). This is the highest percentage of dwelling houses of all the coastal centres. There are two master planned sites at Smiths Lake that provide a higher density of development and would provide more housing diversity.
- Development intensification and expansion opportunities are currently limited not only by surrounding vegetation, but also due to the restricted access – one road in and out. Any proposed rezoning options must first address these issues. Close consultation with the NSW Rural Fire Service will be required (see Smith Lakes Study, circa 2000).

Pacific Palms

Pacific Palms includes the villages of Blueys, Boomerang and Elizabeth Beaches. It has the highest vacancy rate of MidCoast (64%) which reflects the high influx of tourists and holiday makers throughout the year and especially at peak periods.

The supply and demand assessment is provided below.

Population and housing characteristics

- Population: 697 (2016); 664 (2011)
- private dwellings: 756 (2016)
- population growth (2011-2016): 0.97%/year
- household size: 2.2 people/household
- household type: 74% houses, 14% townhouses/units
- vacancy rate: 64%

(ABS data source: Blueys Beach-Boomerang Beach UCL and Elizabeth Beach UCL)

Supply	Est dwellings
Undeveloped residential land	309
Urban release areas	-
Total	**309**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.97%)	849	149	9	**175**
High growth (Average growth + 20%)	876	179	11	**210**

Key findings

- There is sufficient land identified for future residential development until 2036.
- Houses remain the dominant dwelling type, however there has been an increase in the number of units/townhouses up to 14%. There is a need to examine whether this can be further accommodated while not adversely affecting the character of these villages.
- The land release area program throughout the Pacific Palms is close to concluding after 25 years. Opportunities for additional land rezoning is highly restricted due to surrounding vegetated landscape.
- Opportunities for growth may exist in surrounding areas between Pacific Palms, Charlotte Bay and Smiths Lake. For example, Blueys Estate (a current Planning Proposal) has been required by the NSW Department of Planning, Industry and Environment to have strategic consideration of how these areas may become more sustainable in the future, by facilitating both residential and employment land releases.

Villages with urban release areas

Each of these villages has a population of less than 1,000 people and urban release areas that have been identified through strategies such as the Mid North Coast Regional Strategy. It is important to identify these sites to recognise that there is potential for residential development. In some cases, they have the potential to grow to accommodate a population over 1,000 people.

Green Point

Green Point is a residential community 10 minutes drive south of Forster. It has high amenity with surrounding lakes and environmental areas, and has close proximity to beaches.

The supply and demand assessment is provided below.

Population and housing characteristics

- population: 526 (2016); 587 (2011)
- private dwellings: 257 (2016)
- population growth (2011-2016): -2.17%/year
- household size: 2.2 people/household
- household type: TBC% houses, TBC% townhouses/units
- vacancy rate: 17%

(ABS data source: Smiths Lake UCL)

Supply	Est dwellings
Undeveloped residential land	0
Urban release areas	50
Total	**50**

Demand	Projected population 2036	Projected pop. growth 2016-2036	Projected dwellings per year	Projected add dwellings to 2036
Average growth (0.1%)	537	11	0.25	**5**
High growth (Average growth + 20%)	539	13	0.3	**6**

Note that 0.1% growth rate has been used as a default minimum where necessary.

Key findings

- There is adequate residential supply until 2036, though to achieve the increase of 5-6 dwellings over 20 years land would need to be rezoned.
- The only form of residential accommodation in this location is detached dwelling houses at this time.
- Opportunities for growth and expansion are significantly constrained by environmental constraints and proximity of the National Park.
- The only land available in a rural zone that adjoins the existing village is constrained and has been the subject of rezoning and development applications that have not progressed. There is a need to review the potential of this land to resolve ongoing concerns from the community about future development.

Coopernook

Coopernook was bypassed by the Pacific Highway in 2010, making it a more tranquil village.

Coopernook has had the largest population growth for a rural village in MidCoast Council, being 3.8% per year from 2011 to 2016. This equates to around 12 people per year.

Population and housing characteristics

- population: 365 (2016); 303 (2011)
- population growth (2011-2016): 3.8%/year
- household size: 2.3 people/household
- household type: 100% houses, 0% townhouses/units

(ABS data source: Coopernook UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	85
Urban release areas	67
Total	**152**

This centre is less than 500 people and as such a more detailed population analysis has not been undertaken at this stage.

Key findings

- Planning is required over the next 10 years to determine where future growth in Coopernook can be accommodated.
- Some existing residential land and land surrounding the village are constrained by flooding.
- Houses are the only available dwelling type available at Coopernook.
- Coopernook is connected to sewer which could support increased growth.

Lansdowne

Lansdowne is nestled amongst rural lands with views to the mountains.

Lansdowne has been subject to a declining population of 7 people between 2011 and 2016. Lansdowne maintains a high number of young families as it has one of the highest number of people per household in the MidCoast being 2.5.

Population and housing characteristics

- population 362 (2016); 369 (2011)
- population growth (2011-2016): -0.38% per year
- household size: 2.5 people/household
- household type: 100% houses, 0% townhouses/units

(ABS data source: Lansdowne UCL)

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped residential land	0
Urban release areas	142
Total	**142**

This centre is less than 500 people and as such a more detailed population analysis has not been undertaken at this stage.

Key findings

- There appears to be sufficient land available to meet the needs of the future population, though it is understood that the land identified for possible rezoning is highly constrained by flooding.
- Houses are the only available dwelling type available at Lansdowne.

Karuah

Population and housing characteristics have not been examined for Karuah as the bulk of the township is not located in MidCoast Council. The following excerpts from the Karuah Growth Strategy (December 2011) are included below to provide a basic context to the urban release area located in Karuah.

The supply and demand assessment is provided below.

Supply	Est dwellings
Undeveloped Residential Land	21
Urban release areas	30
Total	**51**

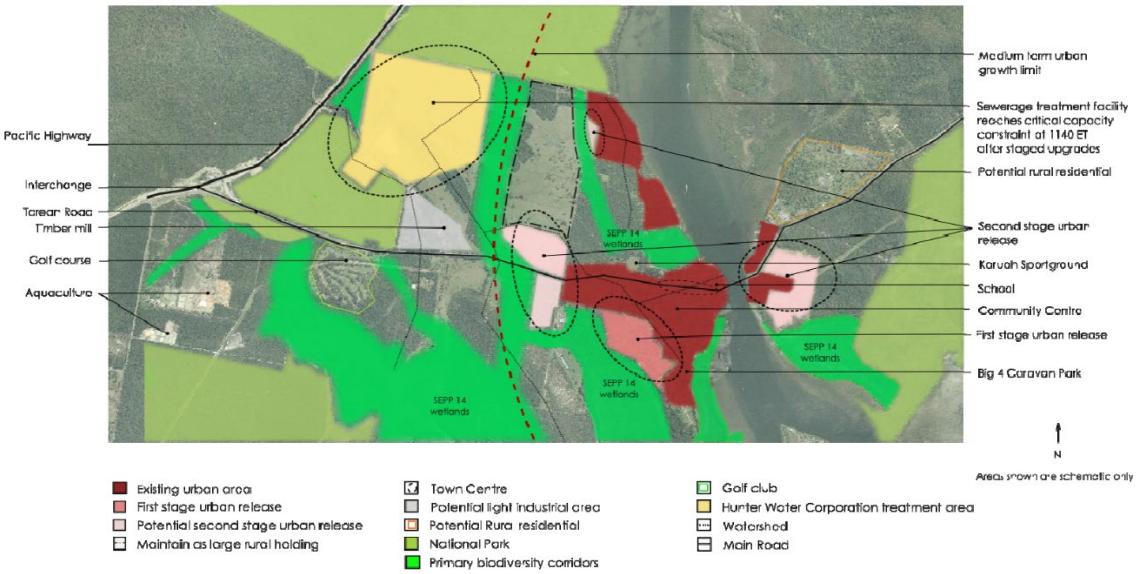
Key findings *(from the Karuah Growth Strategy, December 2011)*

- There is sufficient land to accommodate urban development in Karuah until beyond 2030 at accelerated rates of growth in the identified future urban release areas.

- In order to provide market competition and land/housing choice there is merit in Stage 1 and Stage 2 of the land release program progressing. While this could lead to an excess of land theoretically available for development, the closeness of these sites to the existing village, combined with the staging of subdivision development in response to market demand, means this should not create difficulties.

  Because of the advanced stage of Growth Area South ("Stage 1" of land release) in the rezoning process, this is likely to develop before new development in Growth Areas East and West ("Stage 2" of urban land release) in any case.

Figure: Draft Karuah Land Use Strategy v4



Appendix B: Glossary of Relevant ABS Terms

This is a list of key ABS terms relevant to the Urban Land Monitor.

Dwelling definitions

A **Dwelling** is a structure which is intended to have people live in it, and which is habitable on Census night. Some examples of dwellings are houses, motels, flats, caravans, prisons, tents, humpies and houseboats.

- **Non-Private Dwellings** (NPDs): NPDs are those dwellings, not included above, that provide a communal or transitory type of accommodation. NPDs include hotels, motels, guest houses, prisons, religious and charitable institutions, boarding schools, defence establishments, hospitals and other communal dwellings.
- **Private Dwellings** are enumerated using online or paper household forms, which obtain family and relationship data as well as information on the dwelling itself such as rent or mortgage payments and ownership.
    - **Occupied Private Dwellings**: An occupied private dwelling is a private dwelling occupied by one or more people. A private dwelling is most often a house or flat. It can also be a caravan, houseboat, tent, or a house attached to an office, or rooms above a shop. Occupied dwellings in caravan/residential parks or camping grounds are treated as occupied private dwellings.
    - **Unoccupied Private Dwellings**: These are structures built specifically for living purposes which are habitable, but unoccupied on Census night. Vacant houses, holiday homes, huts and cabins (other than seasonal workers' quarters) are counted as unoccupied private dwellings. Also included are newly completed dwellings not yet occupied, dwellings which are vacant because they are due for demolition or repair, and dwellings to let. This includes unoccupied units in retirement villages (self-contained). Unoccupied residences of owners, managers or caretakers of caravan parks, marinas and manufactured home estates are also counted, but other unoccupied dwellings in such establishments are not counted.