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STAWELL STRUCTURE PLAN PLANNING SCHEME AMENDMENT

UPDATED RESIDENTIAL LAND SUPPLY & DEMAND ASSESSMENT

Prepared by **Hansen Partnership**
for **Northern Grampians Shire Council**

May 2023

Urban Planning | Urban Design | Landscape Architecture

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1.0 Population & Demographics

2021 Census data provided by ABS provides an overview of population and demographic trends in Stawell.

The following section provides an update to Chapter 4 of the previous Stawell Structure Plan & Urban Design Framework Discussion Paper (August 2020), which outlined population and demographic trends based on 2016 census data.

Population

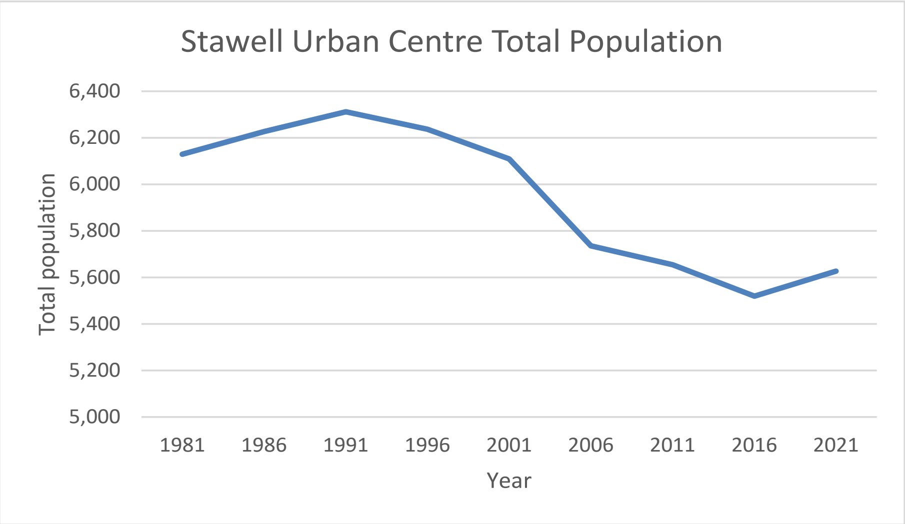
Stawell (postcode 3380) had a total population of 6,220 persons in 2021 (a 3.12% increase from 6,032 persons in 2016). This was over half of the Northern Grampian Shire's (Local Government Area) total population at the time (11,948 persons).

Stawell is smaller in population than nearby Ararat (9,602 persons) (postcode 3377) which functions in a similar and complementary manner. Horsham (15,134 persons) (postcode 3400) is the nearest major regional centre with wider activity, commercial and retail offerings.

Historic ABS data has reveals that the population of Stawell (postcode 3380) has remained relatively stable over the 20 year period between 2001 and 2021 (with a drop to a 5,877 person low in 2006).

In terms of the Stawell Urban Centre and Locality (as defined by the ABS Census hierarchy), the population of the urban centre had been gradually declining since 1991, to a low of 5,220 persons in 2016, but rose to 5,627 persons in 2021, as shown in the below graph.

In terms of the wider Stawell district/catchment area (ABS Census Statistical Area Level 2), data for 2021 identified the residential population to be 8,504 persons. A review of historical ABS data has shown a decline in this area from 8,270 persons in 2011.



Age Demographics

In 2021, children aged 0 – 14 made up 15.4% of the population, those aged 14 – 64 made up 58.5% and people aged 65 years and over made up 26.2% of the population. The medium age was 47 years, compared to 38 years in Victoria. The older population cohort (i.e. those over 65 years in age) in Stawell was greater than the State-wide percentage for this age group (16.8%).

Since 2006, the resident population of those aged 65 and over increased by 6.3%. This demonstrates that, similar to other regional centres, Stawell has an aging demographic.

Dwellings

61.2% of all households were comprised of family households, 35.5% were single (or lone) person households and 3.4% were group households). The average household size was 2.2 persons.

Of the families in Stawell, 16.1% were one parent families, 32.1% were couple families with children and 49.7% were couple families without children.

Of the occupied private dwellings in Stawell, 90.2% were detached houses, 3.8% were semi-detached, row or terrace houses, townhouses etc and 5.3% were flat or apartments. In terms of bedrooms, 4.1% of private dwellings had one bedroom, 16.8% had two bedrooms, 52.4% had three bedrooms, and 24.4% had four or more bedrooms.

Motor vehicle ownership was high at 92.1%. Of the occupied private dwellings, 38.1% had one registered motor vehicle garaged or parked at their address, 34.4% had two registered motor vehicles and 19.6% had three or more registered motor vehicles.

Having regard to private dwelling ownership, 44.5% were owned outright, 27.3% were owned with a mortgage and 25% were rented.

Employment

2,738 residents aged 15 and over (52% of total residents aged 15 and over) were reported to be in the labour force in the week before the 2021 Census. Of those reported to be in the labour force, 54% were employed full-time, 34.3% were employed part-time, 7.6% were away from work and 4.3% were reported to be unemployed.

Numbers of residents in full or part-time employment were similar in Stawell to the rest of the Shire (Local Government Area). 5,372 residents aged 15 and over (52.9% of total residents aged 15 and over) were reported to be in the labour force across the Shire in 2021 Of this total, 54.2% were employed full-time, 34.2% were employed part-time, 7.7% were employed and 3.7% were unemployed.

**Note 1. VIF is published for a series of geographic areas known as Victoria in Future Small Areas (VIFSAs). VIFSAs are based on Statistical Area Level 2 (as used by ABS), but adjusted to be exact subsets of Local Government Areas (LGAs).VIFAs are smaller than LGAs and fit entirely within them but large enough to avoid the uncertainty attached to some projections at SA2 level*

Population Projections

In 2019, the Victoria in Future (VIF) population projections were released. The VIF is the official state government projection of population and households across Victoria, its regions, and districts including Stawell.

Since the 2019 VIF data was released, ABS published its 2021 census data on the residential population of Stawell district (Statistical Area Level 2). The VIF estimated the population of the Stawell district Victoria in Future Small Area (VIFSA) (*Note 1) to be 8,003, which was lower than the 8,504 persons identified in the ABS 2021 census for the Stawell District SAL2. Covid-19 lockdowns could possibly be attributed to the discrepancy between VIF population projection and actual recorded census population - with larger numbers of people migrating to rural areas such as Stawell than anticipated.

The VIF projections anticipated a continued decline in the estimated resident population within the VIFSA for the Stawell District between 2021 and 2036. Of note, the VIF2019 projections forecasted an average district population decline of 0.53% per year between 2021 and 2036, with a total decline of 405 residents over that period and resulting in a total population of 7,598 residents.

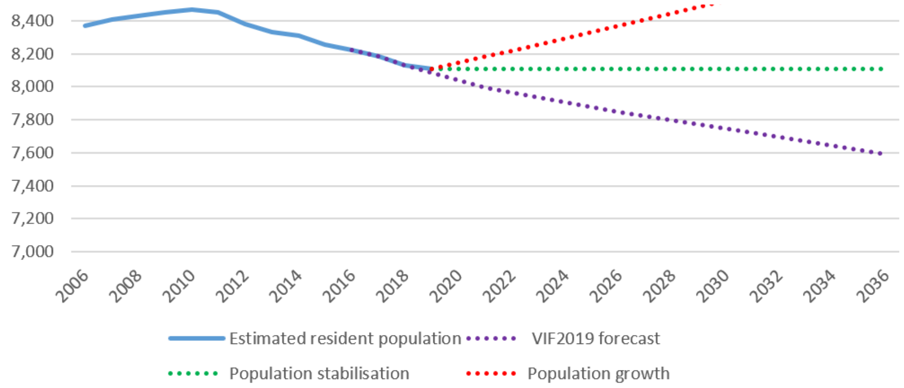
The Stawell Structure Plan & Urban Design Framework Discussion Paper (August 2020) prepared two other population projections to test scenarios where there is a potential upturn in the number of people being attracted to Stawell and the wider district over the coming years.

The two alternative population scenarios are outlined as follows:

- Population stabilisation, which envisages a stabilisation in population numbers, maintaining the present population level.
- Population growth, in which current employment generating projects in the area create a steady resurgence in the population as new workers and their families are attracted to the district.

These scenarios are provided against the VIF2019 projections on the graph below.

The stabilisation scenario forecasts 519 more residents than the VIF2019 forecast by 2036. On the other hand, the population growth scenario envisages growth of 0.45% per year on average, resulting in 645 more residents than at present living in Stawell by 2036, bringing the total population to 8,754 residents.



2.0 Land Supply and Demand

Residential Land Supply and Demand Assessment

An updated Land Supply and Demand Assessment has been undertaken for Stawell to identify the current supply of residentially zoned land. This includes all land zoned within the General Residential Zone (GRZ), Mixed Use Zone (MUZ), and Low Density Residential Zone (LDRZ).

This provides an update to Chapter 6 of the previous Stawell Structure Plan & Urban Design Framework Discussion Paper (August 2020) based on the availability of new 2021 census data from ABS, new planning and building permit approvals data from Council and new 2022 aerial mapping.

A methodology outlining how the assessment has been undertaken is provided within Appendix 1.

Land Supply

Based on an analysis of vacant residentially zoned land within Stawell, the following is noted:

- There is approximately 70ha of vacant residentially zoned land across 141 lots within Stawell. This consists of:
  - Approximately 56ha General Residential Zone (GRZ) land across 119 lots.
  - Approximately 14ha Low Density Residential Zone (LDRZ) land across 22 lots.
- There is approximately 940sqm. of vacant Mixed Use Zone (MUZ) land. This excludes the approximately 60ha of Crown land located within the MUZ surrounding the train station.
- The majority of the vacant GRZ land is located on the urban fringe of Stawell, particularly along main roads - in the south along Sloane Street, Ararat Road and London Road, and in the north along Byrne Street and proximate to Darlington Road.
- Larger parcels (3600sqm.+) tend to be located on the periphery of the township, adjacent to lower density zones such as the LDRZ and RLZ.
- There are a number of smaller vacant GRZ lots within more central urban locations just southeast of the town centre within proximity to Patrick Street, as well as south of the Stawell railway line.
- Approximately 7ha of this GRZ land and 12ha of LDRZ land is considered to be constrained by extensive vegetation coverage.
- Based on the methodology outlined within Appendix 1, the vacant land has the theoretical potential to accommodate 657 new dwellings on unconstrained land (635 on GRZ land and 22 on LDRZ land).

Potential Number of new dwellings on currently vacant land			
Zone	**Area**	**Vacant Lots**	**Potential New Dwellings**
GRZ	56ha	119	635
LDRZ	14ha	22	22
Total	**70ha**	**141**	**657**

Land with Redevelopment Potential

There are a large number of lots within Stawell that currently contain a dwelling but potentially pose significant potential for either dual occupancy or multi-unit development. A significant number of lots, particularly south of the train line, contain dual frontage, which increases the development prospects.

Based on an analysis of land that currently contains a single dwelling but with the potential to be redeveloped for more than one dwelling, the following is noted:

- There is an approximate total of 920 lots within Stawell with redevelopment potential (i.e. over 950 sqm) for either dual occupancy development, multi-unit, or subdivision for traditional housing development.
- Lots with dual occupancy potential tend to be focussed within the town centre. Larger lots (multi-unit and subdivision potential) are generally located on the urban fringe areas, although there are instances of larger lots dispersed within the centre.
- If as little as 5% of these lots are developed for dual occupancy or multi-unit development and 10% for larger greenfield development, a further 93 new dwellings could be accommodated within Stawell over the next 15 year period.

Demand

Two demand calculations have been undertaken. The first is based on population projections to 2036 outlined within Chapter 1 and the second is based on previous building and planning permit approvals over the last 8 years.

Population Based Demand

As identified in the previous chapter, the population of Stawell has been slowly declining since the early 1990s. Projected forward, and as reflected in Victoria in Future 2019 figures, this results in an approximate decline of 519 residents by 2036 in the Stawell locality.

Under the population scenario where there is an increase in the population of 0.45% per year, this would potentially result in 645 new residents in the wider Stawell locality by 2036. Based on current population distribution, if 66% of these new residents locate in Stawell, this could likely result in 425 new residents by 2036.

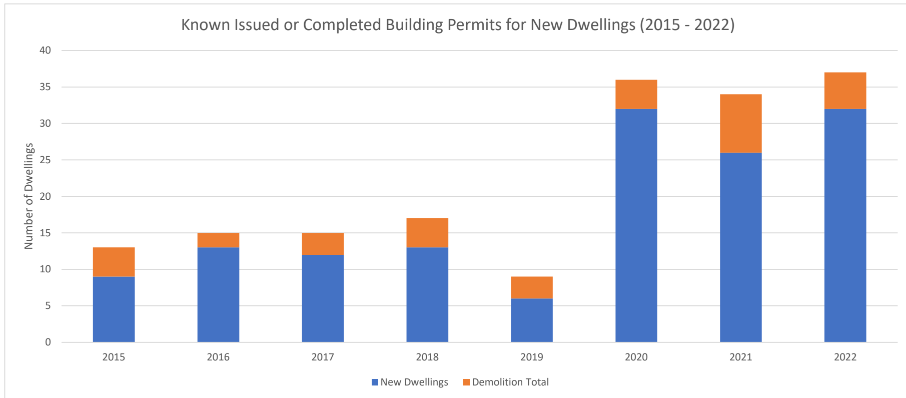
With an average of 2.2 people per household, this could likely generate the need for 193 new dwellings by 2036.

Approval Based Demand

Population demand only provides one half of the demand picture. Planning and building permit data from the last five years has been analysed across the Stawell postcode (3380).

Based on this analysis, the following is noted:

- An average of 10 building permits per year were issued for new residential development between 2015 – 2019. Only 3 were related to multi-unit development and related to the same development. There has been a significant increase in known building activity in recent years, with an average of 30 building permits per year issued for new residential development between 2020 – 2022. There were no multi-unit development approvals identified in the 2020 – 2022 data set.
- 12 building permits were issued for the demolition of houses between 2015 – 2019 (average of 2.4 approvals per year). 17 building permits were issued for the demolition of houses between 2020 – 2022 (average of 5.7 approvals per year).
- A total of 28 planning permits were issued over the period 2015 - 2019 relating to 39 new dwellings (14 associated with multi-unit or dual occupancy development). Zero permits were issued between 2020 - 2022.
- Based on known approvals, dwelling completions and demolitions (completed building permits or actioned planning permits), it is estimated that 124 dwellings have been developed in Stawell over the last eight years (2015 - 2022), equating to an average of 15 new dwellings per year.



Data source: NGSC (2020, 2023)

15 Year Residential Land Supply

Based on the above analysis, while the population of Stawell is likely projected to stabilise or slightly decline, should population increase at a comparatively high growth rate scenario of 0.45%, this could potentially generate the need for 193 new dwellings by 2036. This figure may increase to 225 new dwellings over the next 15 years given existing trends for building and planning permit approvals for new dwellings.

Having regard to known dwelling occupancy rates within the 2016 and 2021 ABS Census for Stawell postcode 3380 (89.4% occupancy in 2021, a marginal increase from 89% in 2016), the above figure has been reduced to reflect a need for 200 new dwellings over the next 15 years.

With a current supply of 70ha of vacant residentially zoned land to theoretically accommodate potentially 657 new dwellings, there is likely to be more than enough supply to meet this demand.

It is noted however, that the majority of this vacant land is on larger lots within the periphery of the township. Towards the centre of the town there is only a small scattering of vacant residential zoned land large enough to accommodate a dual occupancy or multi-unit development.

The limited availability of ready-to-develop vacant land within the centre places a greater emphasis on the redevelopment of currently developed land for dual occupancy or medium density housing to place future residents closer to existing services. The occupied lot sizes within Stawell have significant potential to accommodate greater dual occupancy and multi-unit development, particularly south and west of the town centre.

Providing housing opportunities closer to the town centre has the benefit of locating new development close to existing services and for reducing reliance on car trips. To date Stawell has witnessed limited medium density development catering for alternative housing such as townhouses or unit development. This type of housing has the benefit of increasing housing diversity within the town to cater for changing demographics, particularly for residents wishing to downsize.

However, the above is reliant on existing landowners within the centre being willing to pursue subdivision and redevelopment options in the future. The increase in building approvals and take up of previously vacant land clearly demonstrates a demand for readily developable residential land within Stawell.

Furthermore, Council has provided anecdotal evidence that the Stawell abattoir has been increasing its workforce but has faced difficulties in securing accommodation for workers within the Stawell urban area. As a result, the abattoir has had to buy up rooms in temporary accommodation such as hotels, motels and caravan parks to house workers. This indicates a lack of rental accommodation/housing for temporary workers within Stawell to accommodate the expanding abattoir workforce. The implication of this are fairly significant given the abattoir is a major employer within Stawell.

Thus the housing land supply strategy within the Structure Plan should not hinge its success on the ability to redevelop existing occupied lots.

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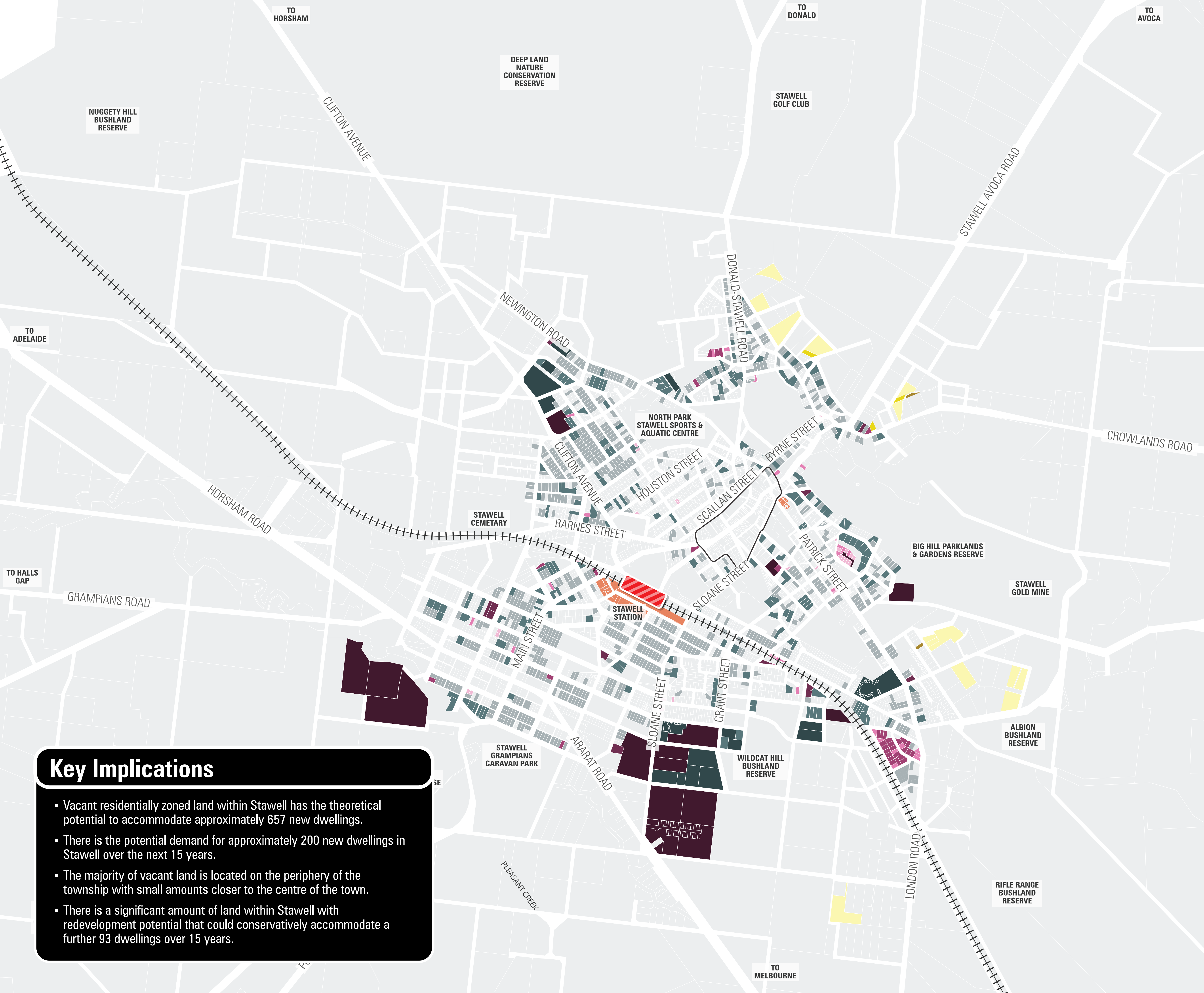
Stawell Structure Plan PSA Update

Vacant Residential Land Analysis



Legend

Stawell Township Core

Residential Surrounds

GRZ VACANT LOTS

0-600m²

600-950m²

950-1200m²

1200-3600m²

3600+m²

LDRZ VACANT LOTS

950-1200m²

1200-3600m²

3600+m²

OCCUPIED RESIDENTIAL LAND WITH REDEVELOPMENT POTENTIAL

950-1200m²

1200-3600m²

3600+m²

Mixed Use Zone

Public Open Space

Train line

Train Station

Waterbody

Key Implications

- Vacant residentially zoned land within Stawell has the theoretical potential to accommodate approximately 657 new dwellings.
- There is the potential demand for approximately 200 new dwellings in Stawell over the next 15 years.
- The majority of vacant land is located on the periphery of the township with small amounts closer to the centre of the town.
- There is a significant amount of land within Stawell with redevelopment potential that could conservatively accommodate a further 93 dwellings over 15 years.

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Scale: 20000 at A3
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APPENDIX 1:
Residential Land Supply Assessment Methodology

Residential Land Supply Assessment Methodology

The following outlines the methodology used for the land supply assessment.

Supply

The Land Supply Assessment was based on a desktop analysis of individual parcels of residential land within Stawell. This was based on an analysis of aerial imagery from November 2022 and checked against data identifying completed building permits over the period from 2015 to March 2023 to capture recent constructions.

Lots were identified as follows:

Vacant

Lots which had no existing dwellings. Lots were removed from the analysis where they related to:

- Public reserves, easements, roads, and driveways (associated with unit developments).
- Where a building permit has been completed since 2015.
- Constrained by extensive vegetation coverage.

Vacant Lots with Subdivision Potential

Vacant land that was considered to be large enough to support subdivision was identified. A number of theoretical minimum lot sizes were defined based on existing patterns of development and across a range of development types within Stawell including single dwellings, dual occupancies, and multi-unit developments.

These were then utilised to determine the number of lots that could be created from vacant residential land across three lot size ranges and the potential type of development that could be accommodated within its location.

The below table provides a summary of the minimum lot sizes and lot ranges utilised.

Minimum lot sizes and lot ranges utilised			
Potential Minimum Lot Size		Existing Lot Size	Type Of Development
1	475sqm	950-1,200sqm	Dual Occupancy
2	300sqm	1,200-3,600sqm	Multi-Unit (inner areas)
3	850sqm	3,600sqm +	Greenfield (outer areas)

Based on the available land, the below provides a summary of the theoretical number of new dwellings that could be accommodated.

Number of new dwellings that could be accommodated			
Zone	Area	Vacant Lots	Potential New Dwellings
GRZ	56ha	119	635
LDRZ	14ha	22	22
Total	**70ha**	**141**	**657**

Lots with Redevelopment Potential

Lots with existing dwellings but with the potential to support infill development or further subdivision were identified.

Lots with recent completed building permit approvals for construction were removed from the analysis on the assumption there would be limited future development appetite from the landowner(s). Community uses such as churches and community centres were removed from the analysis.

The analysis was applied to lots over 950sqm in size and used the above minimum lot sizes.

It is highly unlikely for all lots to become available for redevelopment in the future, given the development potential will ultimately depend on the choices of current and future landholders. As such, to more accurately understand the future potential of the land, an assumption was made that only a certain percentage of this land will become available within a reasonable period of time.

The assumptions used and theoretical new dwellings is outlined below.

Assumptions			
Development Type	Existing Lot Size	Assumed Development	Potential New Dwellings
Dual Occupancy	950-1,200sqm	5%	35
Multi-Unit	1,200-3,600sqm	5%	40
Suburban	3,600sqm +	10%	18

Building and Planning Permit Approvals Data

The analysis contained in this report is derived from known building and planning approvals data supplied by Council.

While the supplied data provides a reasonable indication of building activity at the township level, it us unlikely to provide a complete picture of what is occurring. Caution should be applied to the statistical analysis of Council's building permit data as this is supplied partly by private building surveyors and may not be a complete representation of all building activity.

Estimated dwelling completions were identified based on known completed building permits (dwellings assumed to be complete where a building permit has been completed) and known actioned planning permit approvals. Aerial mapping was used to assist in this analysis. Demolition approvals were subtracted from the total approvals to calculate the final estimated sum.


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