



Planning &  
Infrastructure

# South Coast Housing and Land Monitor

**2010-2011 Report**

October 2012

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# Introduction

The South Coast Housing and Land Monitor (Monitor) is a product arising out of the Department's South Coast Regional Strategy (February 2007) and a key action of the Settlement Planning Guidelines (August 2007).

The Monitor applies to the South Coast Region of NSW, being the three local government areas of Shoalhaven, Eurobodalla and Bega Valley and is a collaboration between the Department and the three Councils.

The Monitor tracks overall development, the types of development and land availability to provide a context for setting and reviewing settlement policy within the region. It is also designed to assist with the roll-out and servicing of new urban areas and infill redevelopment. This brings increased certainty to the planning process and ensures the orderly release of land and appropriate housing to meet the needs of future communities.

Specifically, the Monitor:

- Collects historic data on lot capacity and dwelling construction
- Records capacity estimates for new residential lots and new dwellings across the range of housing types
- Forecasts annual greenfield lot release
- Identifies expected delivery of approved greenfield lots, and
- Records the ongoing supply and take up rates of rural residential development.

## Housing and population targets

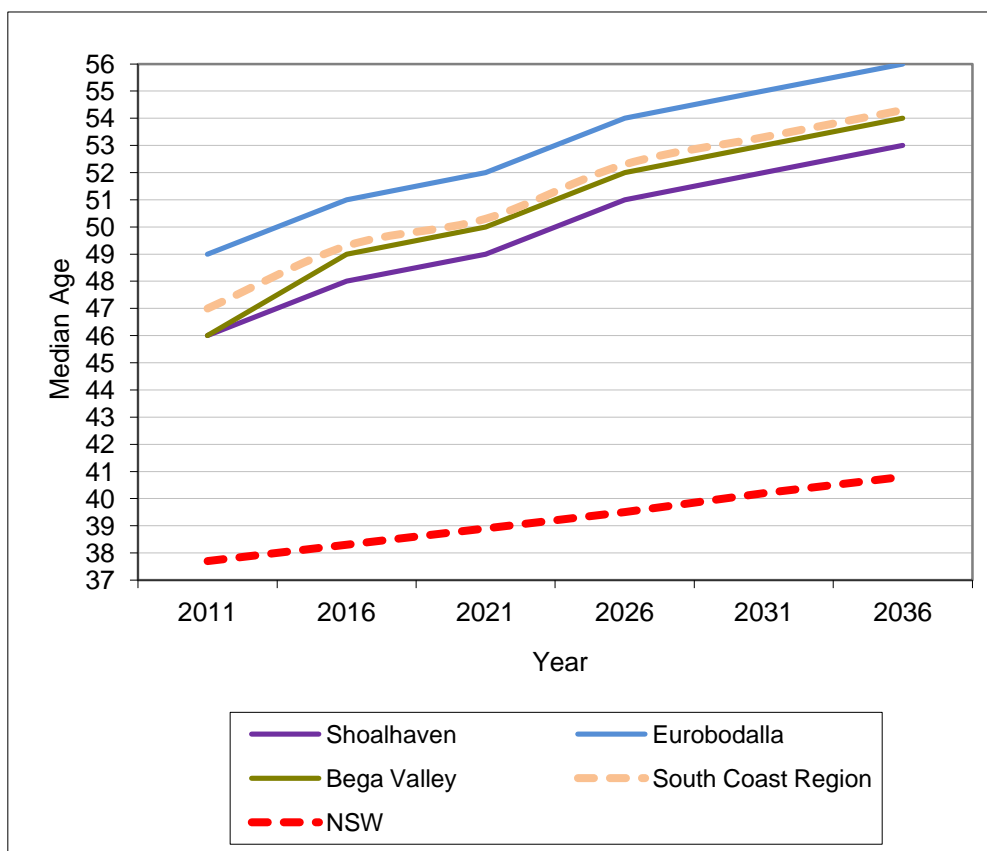
At 2011 there were approximately 166,000 people living in the South Coast Region<sup>1</sup>. Shoalhaven is the largest local government area (LGA) in terms of local population, accounting for 58% of the Region's total, followed by Eurobodalla (22%) and Bega Valley (20%). The South Coast Regional Strategy (Regional Strategy) projects that an additional 45,600 dwellings will be required to satisfy housing demand to 2031.

The Settlement Planning Guidelines provide a breakdown of the proportion of demand for additional dwellings expected across a number of categories:

Shoalhaven	Eurobodalla	Bega Valley
Total households/dwellings: 26,300	Total households/dwellings: 10,700	Total households/dwellings: 8,600
Families with children 25% Couples without children 37% Group households 2% Lone persons 36%	Families with children 17% Couples without children 42% Group households 2% Lone persons 39%	Families with children 13% Couples without children 41% Group households 3% Lone persons 43%

<sup>1</sup> ABS (2012) *Regional Population Growth, Estimated Resident Populations, 2001 to 2011, Cat. 3218.0*

The Regional Strategy and the Department’s population projections have identified that the population is likely to age markedly over the next 25 years. Under the Department’s projections, the Region’s median age will increase from 47 to 54 years of age. The following figure projects median age changes for each LGA, the Region and NSW up to 2036.



The ageing population will have a significant effect on housing preferences and it is likely that the expected population shifts will see a demand for different types of housing, e.g. standard detached, dual occupancy and medium density development. To meet these changes, housing mix targets, consistent with the actions and outcomes of the Regional Strategy have been identified.

- 60:40 (detached: medium density [including dual occupancy]) within the identified urban precincts, and
- 70:30 (detached: medium density [including dual occupancy]) across each LGA.

### Data collection periods and source of data

This is the second Monitor report and the Department has taken the opportunity to improve the reporting. All reporting periods are now on a financial year basis (2010-2011). Where possible, the ways in which the data is collected throughout the region have also been standardised. This consistency in information has resulted in a more meaningful document.

A new addition to the Monitor report is a locational breakdown of approved greenfield supply in each LGA. This information provides a greater understanding of where this supply is located throughout the region and provides a forecast timeframe for release.

The Monitor will be reviewed annually and the Department will work with Councils to expand the type of data collected across the three local government areas. Greater comparison and analysis will be possible as trend data is established.

## Urban Precincts

Within this Monitor, data is reported across the LGA, or as a comparison of the key urban areas (Urban Precincts) and the 'rest of the LGA'. The urban precincts are identified as follows:

Urban Precincts	Inclusive areas
<b>Shoalhaven LGA</b>	
Nowra-Bomaderry	Nowra, Bomaderry, North Nowra, Norwa Hill, Meroo Meadow, South Nowra, Worrigeer, West Nowra, Mundamia, Bamarang, Cambewarra, Terara  <i>Bamarang, Mundamia and Meroo Meadow are currently undeveloped greenfield sites.</i>  <i>Although part of the Nowra-Bomaderry centre, it is noted that Terara and Cambewarra are outlying villages.</i>
Bay and Basin	Vincentia-Huskisson urban area, St Georges Basin (including Basin View), Sanctuary Point (including Erowal Bay and Old Erowal Bay), Tomerong, Wandandian, Callala Bay and Beach, Culburra-Orient Point, Greenwell Point, Woollamia, Hyams Beach, Myola, Falls Creek and Currarong  <i>Callala Bay and Beach, Culburra-Orient Point, Greenwell Point and Currarong areas are included in this grouping due to the proximity to the Bay and Basin area. It is noted that their servicing is generally from Nowra as there are no direct transport links to the Bay and Basin area.</i>
Ulladulla	Ulladulla, Burrill Lake, Dolphin Point, Narrawallee, Mollymook, Mollymook Beach and Kings Point
<b>Eurobodalla LGA</b>	
Batemans Bay	Maloneys Beach, Long Beach, Surfside, North Batemans Bay, Batemans Bay, Catalina, Batehaven, Sunshine Bay, Denhams Beach, Surf Beach, Lilli Pilli, Malua Bay
Moruya	Moruya, Moruya Heads
Narooma	Kianga, North Narooma, Narooma
<b>Bega Valley LGA</b>	
Bega	Bega
Merimbula	Merimbula, Berrambool, Tura Beach, Mirador
Bermagui	Bermagui
Eden	Eden

# Monitor overview

## Dwelling stock and housing mix

By monitoring dwelling stock, the Department and Councils are able to examine overall housing supply and track the shifts in dwelling types. As the population ages, a significant proportion of new additional households within the South Coast Region are likely to be occupied by couples or singles. To meet this shift in demand, housing mix targets have been identified to encourage greater medium density<sup>2</sup>, particularly in the identified urban precincts.

Within the South Coast Region, the urban precincts have the greatest concentration of existing dwelling stock (77% in Shoalhaven, 67% in Eurobodalla and 72% in Bega Valley).

The following table shows the 2010-2011 new housing mix for each urban precinct and LGA provided by each South Coast council. Based on this data:

- 80% of new 2010-2011 dwelling stock was located within the urban precincts in Shoalhaven (the same as in 2009/2010)
- 64% of new 2010-2011 dwelling stock was located within the urban precincts in Eurobodalla (compared to 93% in 2009/2010)
- 38% of new 2010-2011 dwelling stock was located within the urban precincts in Bega Valley (compared to 44% in 2010).

2010-2011 financial year	Detached total	Medium density total	Total new dwellings
<b>Shoalhaven</b>	<b>195</b>	<b>80</b>	<b>275</b>
<i>Nowra-Bomaderry</i>	67	59	126
<i>Bay and Basin</i>	66	5	71
<i>Ulladulla</i>	24	0	24
<i>Rest of LGA</i>	38	16	54
<b>Eurobodalla</b>	<b>175</b>	<b>50</b>	<b>225</b>
<i>Batemans Bay</i>	87	26	113
<i>Moruya</i>	13	6	19
<i>Narooma</i>	11	2	13
<i>Rest of LGA</i>	64	16	80
<b>Bega Valley</b>	<b>274</b>	<b>27</b>	<b>301</b>
<i>Bega</i>	33	3	36
<i>Merimbula</i>	33	8	41
<i>Bermagui</i>	9	3	12
<i>Eden</i>	22	3	25
<i>Rest of LGA</i>	177	10	187

<sup>2</sup> Medium density includes dual occupancy

At the time of the release of the Settlement Planning Guidelines in 2007, the total number of dwellings in each South Coast LGA was heavily biased towards detached housing being 89% in Shoalhaven, 85% in Eurobodalla and 82% in Bega Valley. The percentage of detached dwellings has since decreased to 81% in Eurobodalla and 80% in Bega Valley. The percentage of detached dwellings has increased to 93% in Shoalhaven in the five year period.

This data generally represents a continued increase in dual occupancy and medium density dwellings across the Region, supporting the move towards the housing mix (detached: medium density) of 70:30 across each LGA and 60:40 in urban precincts.

The Standard Instrument local environmental plans (SI LEPs) support medium density development in most urban precincts. The finalisation of these SI LEPs should maintain the focus of new housing and medium density housing within the identified urban precincts.

## Greenfield capacity

The Regional Strategy identifies that an additional 45,600 dwellings are required to satisfy housing demand to 2031. Greenfield development plays an important role in achieving this target.

As shown in the following table, during the 2010-11 financial year, the Region was well supplied with vacant residential and unsubdivided lot capacity, with an average of 26 years supply of greenfield land. The number of benchmark lots is based on the projected additional dwelling requirement of 45,600 and the housing mix target of 70:30 (detached:medium density) across each LGA<sup>3</sup> i.e.  $45,600 \times 0.7 = 31,920$  or 1,277 lots per year.

Shoalhaven had the greatest proportion of the Region's greenfield potential at 63%, followed by Bega Valley (21%) and Eurobodalla (16%). Within the Shoalhaven and Eurobodalla LGAs, the urban precincts had the greatest concentration of potential greenfield lots (90% in Shoalhaven and 75% in Eurobodalla), however only 47% of greenfield potential was located in the identified urban precincts in the Bega Valley LGA.

2010-2011 financial year	Vacant residential lots	Unsubdivided lot capacity <sup>4</sup>	Total of potential greenfield lots
<b>Shoalhaven</b>	<b>3,066</b>	<b>18,081</b>	<b>21,147</b>
<i>Nowra-Bomaderry</i>	558	12,631	13,189
<i>Bay and Basin</i>	1391	1,801	3,192
<i>Ulladulla</i>	627	2,121	2,748
<i>Rest of LGA</i>	490	1,528	2,018
<b>Eurobodalla</b>	<b>1,839</b>	<b>3,434</b>	<b>5,273</b>
<i>Batemans Bay</i>	877	1,564	2,441
<i>Moruya</i>	149	1,116	1,265
<i>Narooma</i>	154	108	262

<sup>3</sup> As per the Settlement Planning Guidelines

<sup>4</sup> Includes vacant unsubdivided zoned lots and endorsed urban expansion areas

<i>Rest of LGA</i>	659	646	1,305
<b>Bega Valley</b>	<b>91</b>	<b>7,001</b>	<b>7,092</b>
<i>Bega</i>	10	1,978	1,988
<i>Merimbula</i>	9	405	414
<i>Bermagui</i>	2	243	245
<i>Eden</i>	4	687	691
<i>Rest of LGA</i>	66	3,688	3,754

Servicing of greenfield land in the Region is managed locally as each council is its own water and sewer authority. Therefore, the ongoing focus of the Region should be on the renewal and redevelopment of identified urban precincts. This should include a strong focus on infill areas that will in turn ensure that changing housing preferences are met.

As sufficient greenfield supply has been identified for each council, the focus over the coming years will be to resolve servicing and development issues (e.g. environmental constraints) in line with the Settlement Planning Guidelines.

The following table provides an overview of approved release areas and forecast lot production<sup>5</sup> in each LGA. From these identified areas, 5,279 new greenfield lots are forecast to be developed in the Region with 45% in the next 5 years.

<b>Release Area</b>	<b>Current</b>	<b>Next 5 years</b>	<b>Beyond 5 years</b>	<b>Total</b>
<b>Shoalhaven</b>	<b>307</b>	<b>1,138</b>	<b>600</b>	<b>2,045</b>
<i>Mundamia</i>	3	510	0	513
<i>Jamieson Rd, North Nowra</i>	35	0	0	35
<i>Manyana Rd, Manyana</i>	3	58	0	61
<i>Highview Dr, Dolphin Point</i>	1	0	142	143
<i>Dolphin Point Rd, Dolphin Point</i>	5	99	161	265
<i>Berringer and Cunjarong Point Rd, Manyana</i>	1	179	0	180
<i>Bayswood, Vincentia</i>	227	220	40	487
<i>Taylor's Rise, Sussex Inlet</i>	30	0	0	30
<i>Sussex Rise, Sussex Inlet</i>	1	72	30	103
<i>Huntingdale Park Berry</i>	1	0	227	228
<b>Eurobodalla</b>	<b>229</b>	<b>142</b>	<b>1,636</b>	<b>2,007</b>
<i>Longbeach</i>	0	0	71	71
<i>Malua Bay</i>	117	35	0	152
<i>Rosedale</i>	0	0	951	951

<sup>5</sup> Forecasts show potential lot production that may be achieved from existing approvals. Timing and actual production may vary depending on a range of supply and demand factors.



<i>Tomakin</i>	35	45	82	162
<i>Moruya</i>	77	41	275	393
<i>Tuross Head</i>	0	0	71	71
<i>Dalmeny</i>	0	0	131	131
<i>Kianga</i>	0	21	25	46
<i>Narooma</i>	0	0	30	30
<b>Bega Valley</b>	<b>21</b>	<b>556</b>	<b>650</b>	<b>1,227</b>
<i>Glen Mia Estate, Bega</i>	7	290	0	297
<i>Newtown Road, Bega</i>	1	16	0	17
<i>Eden Cove Estate, Eden</i>	1	0	200	201
<i>Bermagui Country Club Land, Bermagui</i>	4	0	400	404
<i>Mirador Estate, Tura Beach</i>	1	250	0	251
<i>Wolumla</i>	7	0	50	57

A number of areas within the Region will be zoned from residential to environmental zones following the 2006 South Coast Sensitive Urban Lands Review (Review). The Review recommended that of the 5,900 hectares investigated; approximately 1,770 hectares (30%) should be zoned for environmental conservation. The implementation of the Review has been progressively undertaken through development approvals and principal local environmental plans. Although there has been a reduction in development potential, it has only had a minor impact on local supply. Any changes to potential greenfield allotments across the region will continue to be monitored through future Monitor Reports.

## Rural residential

The Region currently has a large supply of rural residential zoned land (24,380 hectares), dispersed as follows:

- Shoalhaven – 22%
- Eurobodalla – 34%, and
- Bega Valley – 44%.

There are approximately 1,279 vacant lots and 2,593 potential additional lots (unsubdivided) across the Region. The ongoing monitoring of supply and take up rates of rural residential land will enable Councils to carefully consider additions to this existing supply.

2010-2011 financial year	Area (hectares)	Existing lots with dwellings	Vacant lots	Potential additional lots
<b>Shoalhaven</b>	5,497	2,541	298	500
<b>Eurobodalla</b>	8,247	2,426	521	801
<b>Bega Valley</b>	10,636	1,697	460	1,292

# Conclusion

The South Coast Housing and Land Monitor is an important tool to examine overall development, the types of development and land availability within the South Coast Region. The information gathered provides a context for setting and reviewing settlement policy within the region.

Each Council is on track to meet long term dwelling targets with strong supplies of greenfield land. It is expected that the SI LEPs for the three councils will result in a shift towards greater greenfield capacity around the identified urban precincts. Urban precinct zonings will also promote medium density opportunities in an attempt to meet a dwelling mix (30% medium density across each LGA), likely to be needed by the changing demographic profile.

The Monitor will continue to be reviewed on an annual basis which will provide greater opportunities for comparison across the region and local government areas.

The information compiled within this report will assist the Department in identifying areas of strategic need which will feed into the review of the South Coast Regional Strategy which is currently being undertaken by the Department.