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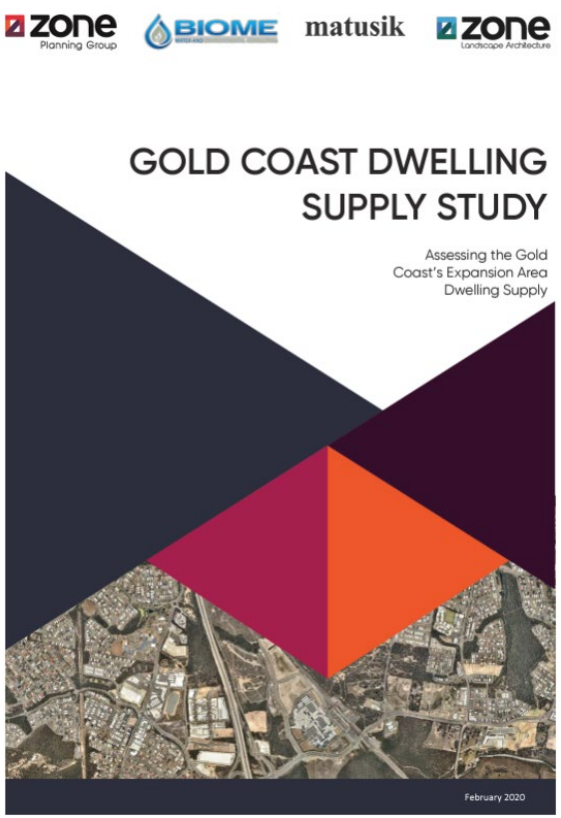
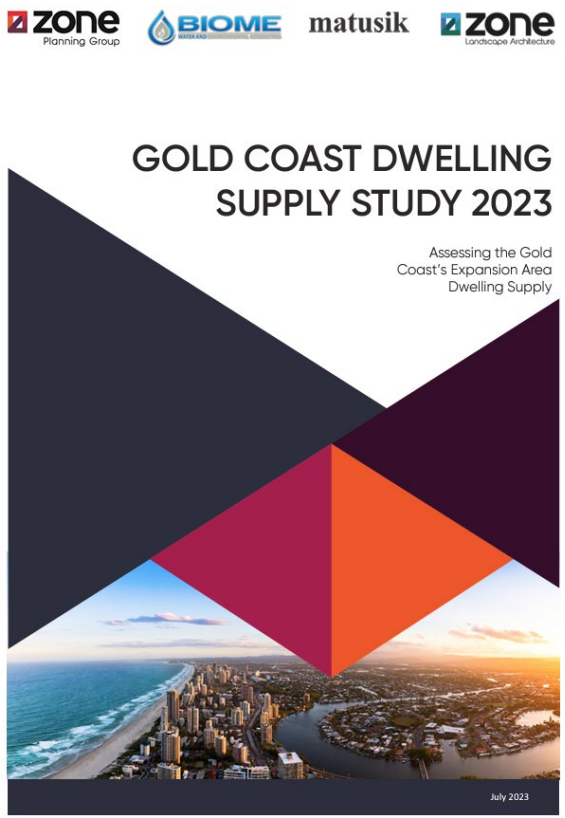
GOLD COAST DWELLING SUPPLY STUDIES 2020 & 2023

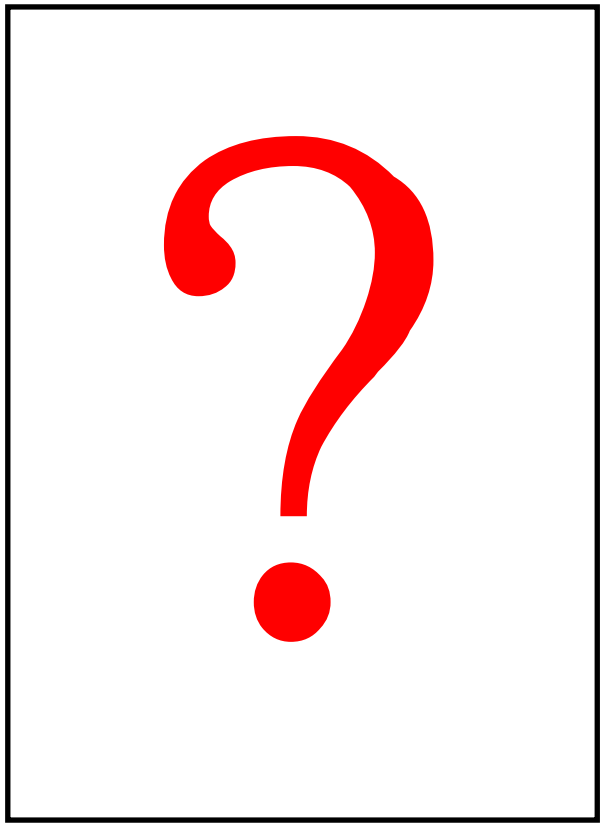
DWELLING SUPPLY STUDIES – 2020 & 2023



Gold Coast Dwelling Supply Study 2020



Gold Coast Dwelling Supply Study 2023



Gold Coast Dwelling Supply Study 2025

- ZPG Dwelling Supply Reports were prepared to determine realistic availability of residential land within "Expansion Area" of the City
- Introduction of SEQRP 2023 Dwelling Typologies change the whole methodology
- Nonetheless, we speculate there is not enough available residential land to meet the SEQRP 2023 target for 17,787 new detached dwellings
- SEQRP 2023 has a clear emphasis on infill development with 62% of new dwelling to be High-rise (9-storeys)

zone Planning Group

PROJECT TEAM

DBI

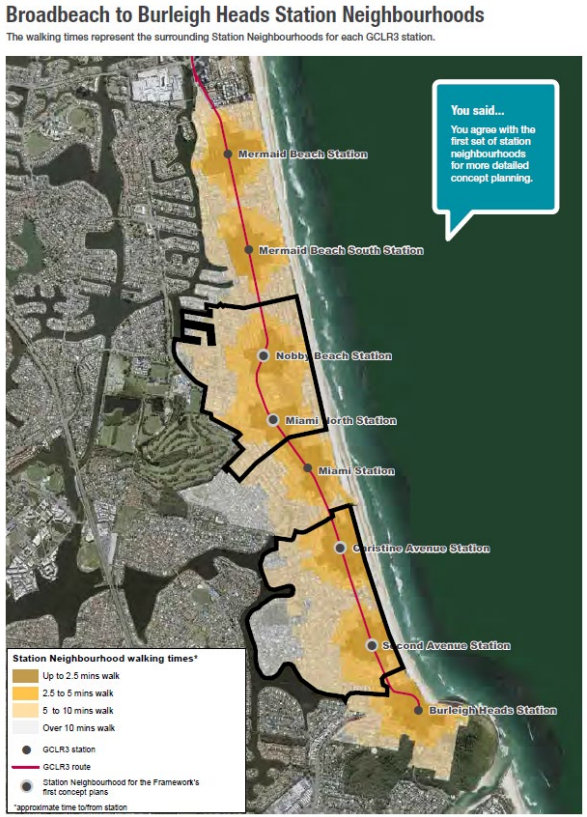
RLB Rider Levett Bucknall

STAGE 3 GOLD COAST LIGHT RAIL CORRIDOR

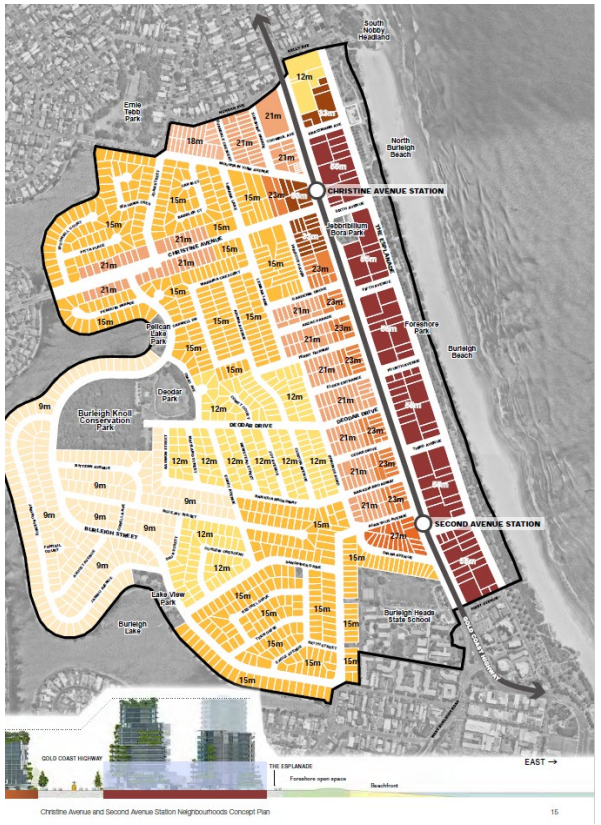
A CASE FOR A MINISTERIAL

TEMPORARY LOCAL PLANNING INSTRUMENT (TLPI)

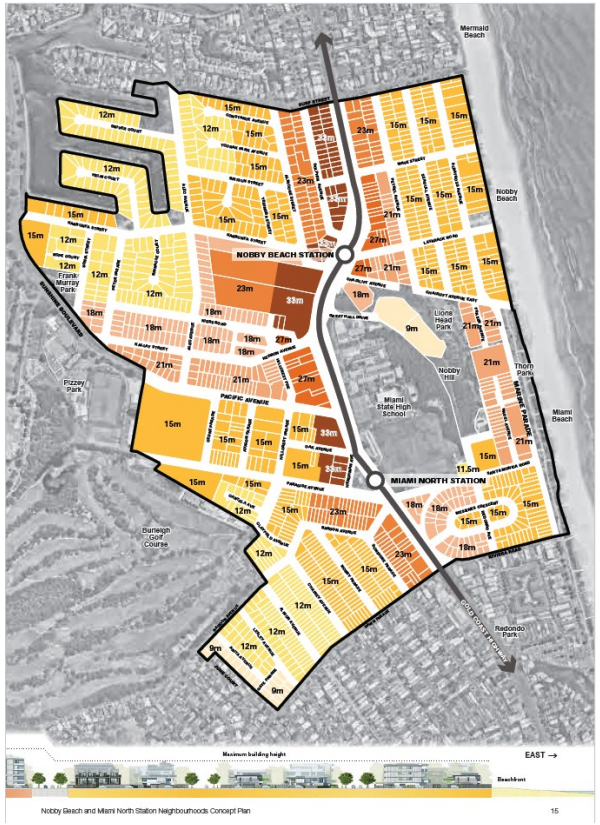
COUNCIL NEIGHBOURHOOD FRAMEWORK STUDIES



Study Area
(CoGC August 2021)



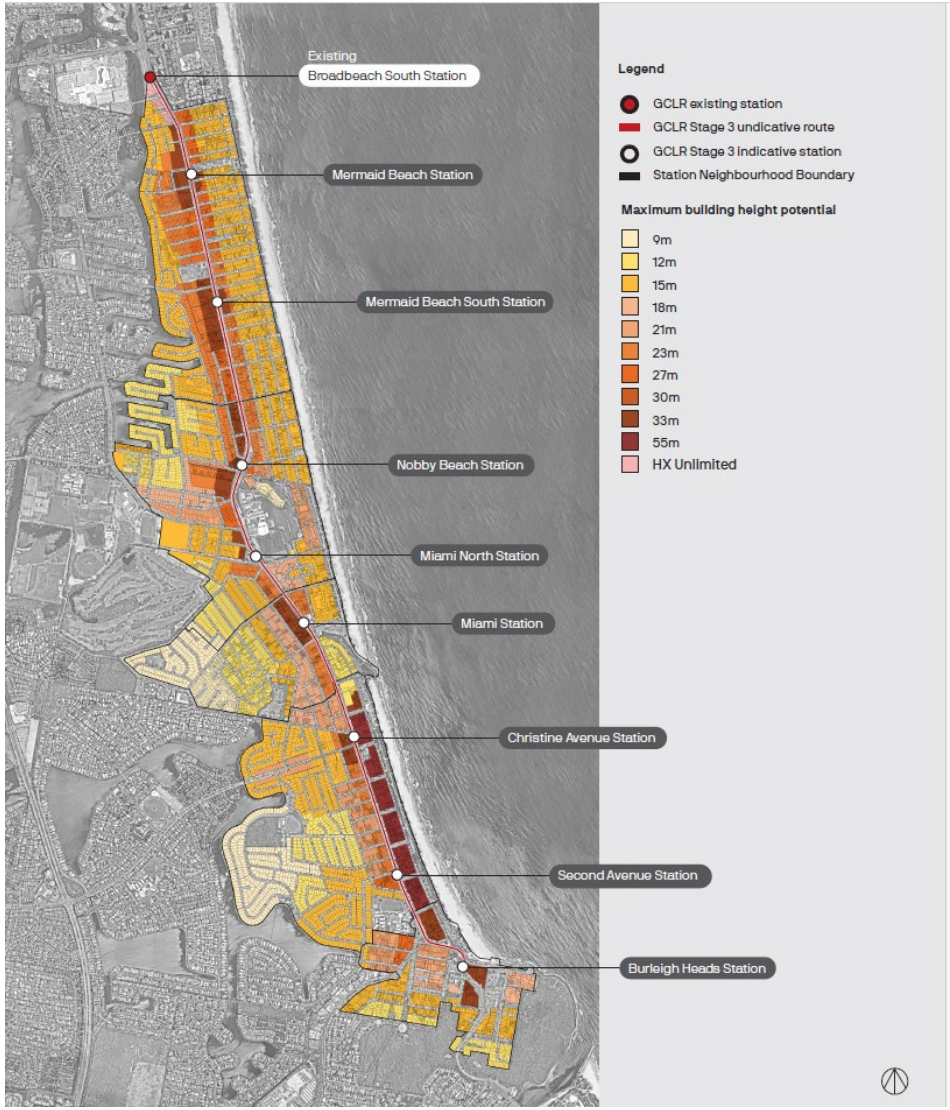
Nobby Beach and Miami North Neighbourhood
(CoGC July 2022)



Christine Avenue and Second Avenue Neighbourhood
(CoGC July 2022)

- Study Area - 604ha
- 2021-2022 Council undertook Neighbourhood Framework studies (314ha of the study area)
- Around these 4 stations, Council reporting estimates a theoretical dwelling supply of 16,000 dwellings
- The equates to a gross residential density of 50 additional dwellings/ha with these areas
- In October 2023, these studies formed part of Council's Draft Housing Supply Statement in response to the Draft SEQRP 2023 Update

PUTTING OURSELVES IN COUNCIL'S SHOES - THE BASE CASE



Base Case – Stage 3 Light Rail Neighbourhood Framework *(ZPG, DBI, RLB May 2024)*

- An exercise in understanding Council's likely dwelling supply outcome for the entire Stage 3 Light Rail Neighbourhood Framework Area (8 new stations)

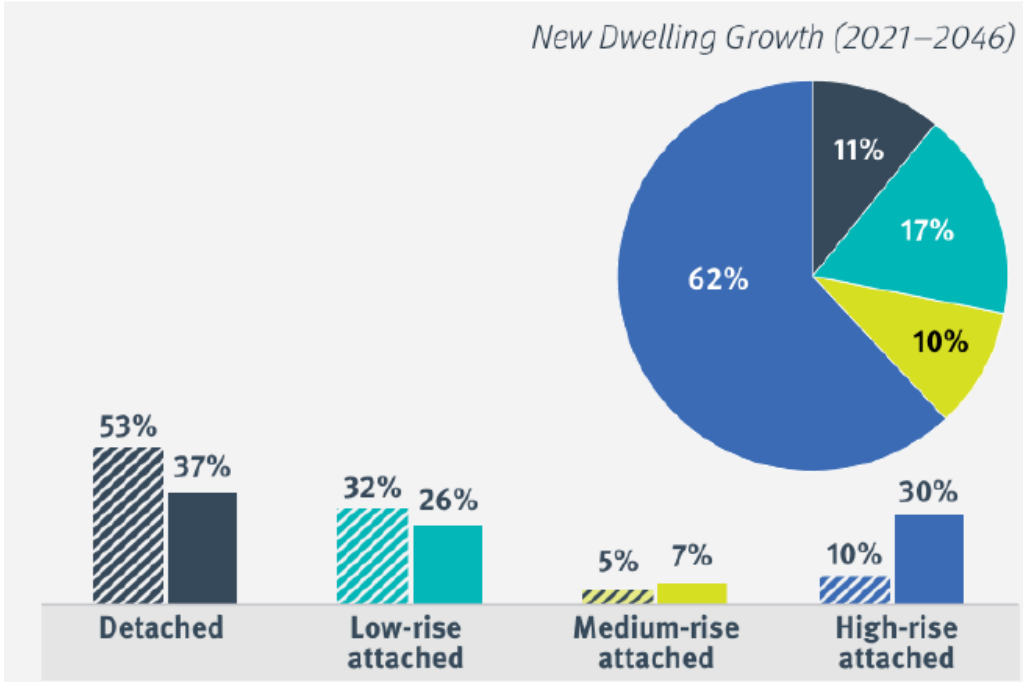
- Given sensitivities and time pressures, no community consultation was undertaken as part of this exercise

- Key assumptions adopted in extrapolating out the balance of the Neighbourhood Framework planning included:
  - Utilising same building height categories adopted as existing Council Concept Plans.
  - Development intensity/increased build height centralised around stations, with building height generally higher within 1-2 blocks from a station.
  - Building height designations bound by road reserves where logical.
  - Base Case anticipates a supply of 30,200 additional dwellings will be achieved (*being an extrapolation of Council's estimated 16,000 dwellings at the same gross density*).

CITY OF GOLD COAST SEQRP 2023 GROWTH TARGETS

Figure 4 – Dwelling typologies and gentle density

- New SEQRP requirements to achieve proportion of new dwellings within certain dwelling typologies
- Dwelling typologies largely based on building height
- 161,700 new dwellings by 2046
- **100,274 new dwellings as High-rise (9+ storeys)**
- 16,170 new dwellings as Medium-rise (4-8 storeys)
- Limited areas in City that current accommodate High-rises
- Mandatory targets set by State for LG Planning Schemes



SEQRP – Total Dwelling Stock 2021 vs 2046

- Council's earlier NF studies pre-dated the SEQRP 2023 update and introduction of dwelling typologies
- Current building approval/title registration data doesn't align with these typologies
- 15,000 dwellings behind already (*approx*)

2019 GOLD COAST STAGE 3 LIGHT RAIL BUSINESS CASE

- The 2019 Light Rail Stage 3 Business Case identified:
  - By 2041 an **additional 26,000 people** will live in this corridor *(expected to increase based on SEQRP 2023 forecasts)*
  - Critical to accommodate forecast growth in Gold Coast southern corridor.
  - Current trend growth in the southern corridor, if unchanged, will fail to realise urban consolidation potential.
  - Need to create the right conditions to promote urban densification around key amenity nodes.
  - The strategic case for the project is largely dependent on the realisation of urban renewal and increased urban density.
  - The level of urban renewal that can be achieved from the project will be critical in achieving the benefits of the project (economic, social and environmental value beyond its costs).

Australian Government | Infrastructure Australia

BUILDING QUEENSLAND

GOLD COAST LIGHT RAIL STAGE 3A

BUSINESS CASE/COST BENEFIT ANALYSIS SUMMARY

Published October 2019

100,274 HIGH RISE DWELLINGS IN 25 YEARS – WHAT WILL IT TAKE?

- The SEQRP anticipates the construction of 4,010 high-rise apartments (9+ storeys) per annum on the Gold Coast to 2046.
- The image to the right is of the Andrews Projects completed 'Encore' tower in Broadbeach.
  - 1,214m² site created from the amalgamation of 2 lots containing aged apartments.
  - 84 units over 25 storeys.
- **Put simply, in order to achieve the SEQRP's 2021-2046 target of 4,010 high-rise apartments per annum, we need to construct 48 of these developments projects every year for 25 years.**

Encore, Broadbeach *(Andrews Projects)*

VALIDATION OF BASE CASE DWELLING SUPPLY

Key assumptions

- Corridor wide approach
- Net cadastral area *(ie; excluding roads, parks/reserves and canals)*
- Site Cover – 50% *(*based on typical development approval outcomes)*
- Net Saleable Area (NSA) – 80% of above site cover *(*based on industry input agreed between ZPG, DBI & RLB)*
- Residential density of 1 dwelling per 150sqm for Low-rise attached SEQRP typology
- Assumed average dwelling size of 120sqm (gross) for Medium-rise and High-rise SEQRP typologies *(ie; apartments)*
- Equivalent number of residential storeys within building height designations
- Redevelopment likelihood factor to 2046
  - Consideration to acquisition/site amalgamation difficulty *(and acknowledging 75% amalgamation rule only applying in limited circumstances)*
  - Consideration to developments under construction and age of existing development
  - Considers realistic chance of redevelopment
- Net dwelling increase
  - Considers new dwellings minus existing dwellings demolished to redevelop; and
  - Non-residential uses and car parking in Mixed-use and Centre Zones.

DWELLING SUPPLY FORMULA

(Cadastral Area ÷ Development Area [0.5] ÷ Developable NSA [0.8] ÷ 120sqm) **x** No. Storeys **x** Redevelopment Likelihood **x** Net Dwelling Increase

REDEVELOPMENT LIKELIHOOD & NET DWELLING INCREASE TO 2046 - EXAMPLES

12m building height (ie: canal estate areas)

- High amenity area and high value existing properties
- Considered that 1 in 3 of these properties on average will be redeveloped to 2046

55m building height (Burleigh Esplanade)

- Recent development cycle indicates high proportion of new buildings/approvals/under construction
- High proportion of existing mid/high-rise buildings not near end of design life
- Amalgamation of higher number of existing properties required
- Higher net dwelling increase incentivises redevelopment
- Considered on balance that 40% of these properties on average will be redeveloped to 2046

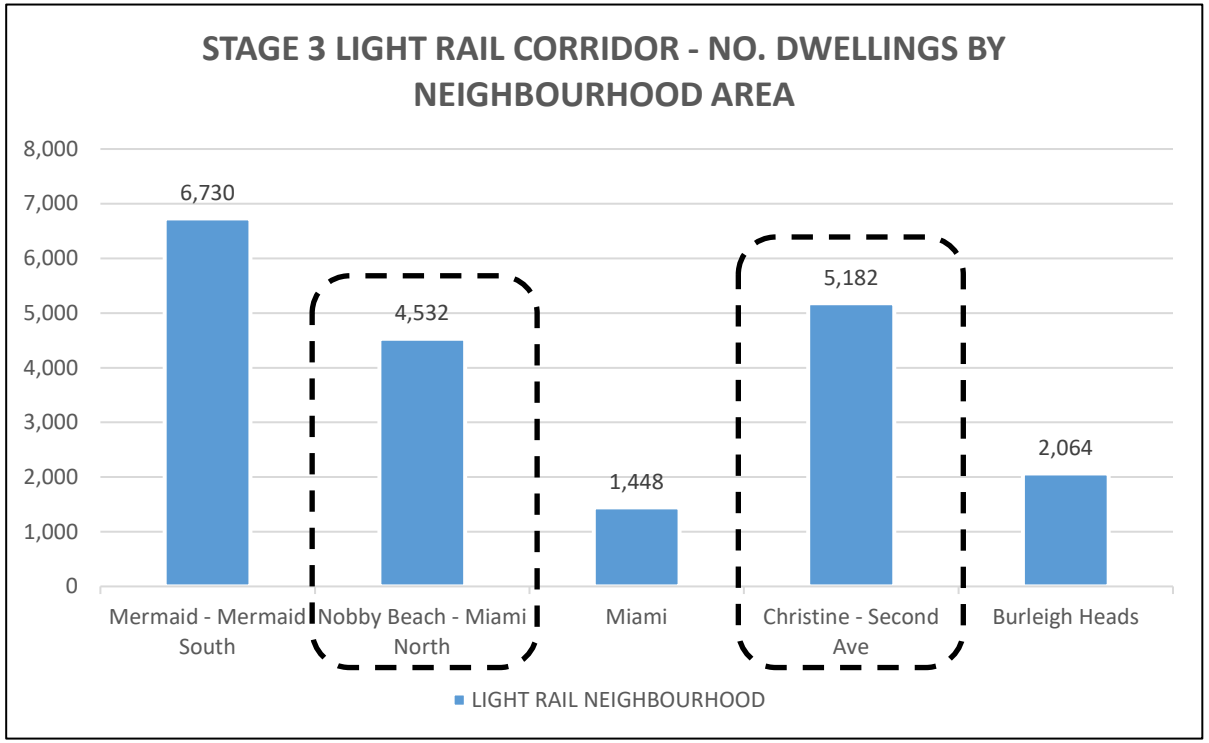
EXAMPLES

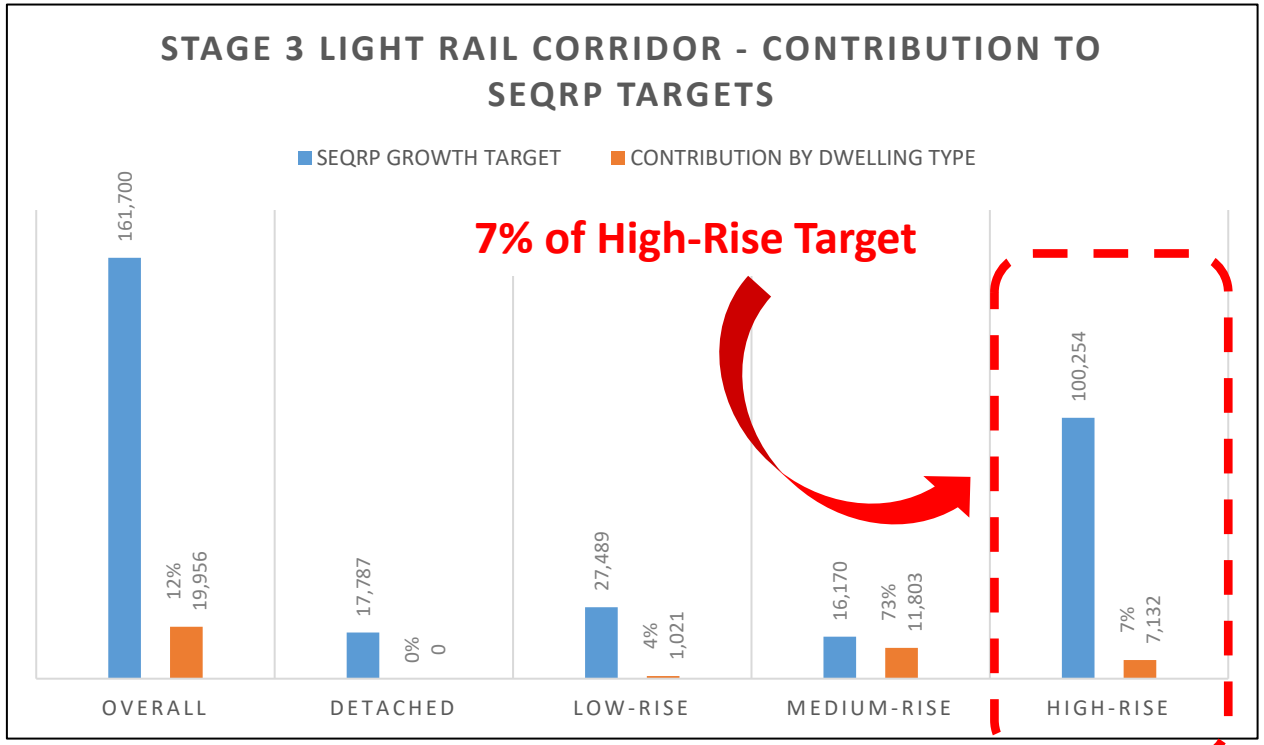
Building Height Designation	Equivalent Residential Storeys	Redevelopment likelihood ratio factor	Net increase dwelling ratio	SEQRP Dwelling Typology
9m	2	0.3	0.5	Low-rise attached
12m	3	0.3	0.5	
12m (Mixed Use)	2	0.3	1	
15m	4	0.3	0.8	Medium-rise attached
15m (Mixed Use)	3	0.3	1	
18m	5	0.4	0.8	
21m	6	0.4	0.8	
21m (Centre)	5	0.4	1	
23m	7	0.4	0.85	
23m (Mixed Use)	6	0.4	1	
27m	8	0.5	0.85	
27m (Mixed Use)	6	0.5	1	
27m (Centre)	6	0.5	1	
33m	10	0.5	0.9	High-rise attached
33m (Mixed Use)	8	0.5	1	
33m (Centre)	8	0.5	1	
55m	17	0.4	0.8	
55m (Centre)	15	0.5	1	
HX	40	0.8	1	

BASE CASE – KEY FINDINGS

- **Where we landed**
  - **19,956 additional dwellings** at an equivalent average density of 32.5 dwellings/ha (gross)
  - **Shortfall of 10,244 additional dwellings** from expected outcome of 30,200 additional dwellings

- Rationalised dwelling supply of "Base Case" scenario would only contribute to **12% of the 161,700 new SEQRP dwelling target for the Gold Coast**
- **Just 7% of the 100,254 new dwelling target for high-rise** attached dwelling typology
- **73% of the 16,170 medium-rise dwelling typology target** within a 7km stretch of the City



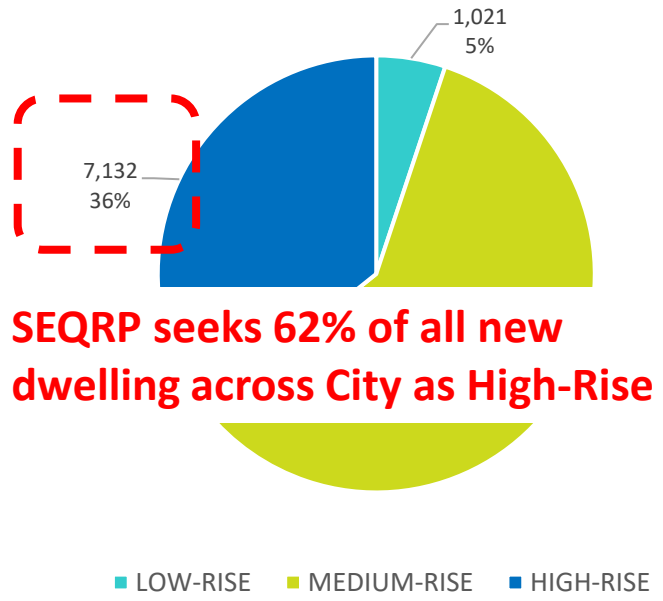


BASE CASE – KEY FINDINGS

STAGE 3 LIGHT RAIL NEIGHBOURHOOD FRAMEWORK AREA
PLANNED ADDITIONAL DWELLING SUPPLY (BASE CASE)

Building Height Designation	Cadastral Area (ha)	Developable Area (ha)	Developable NSA (ha)	Equivalent Residential Storeys	Redevelopment likelihood ratio factor	Net increase dwelling ratio	Number of Dwellings	Density (/ha)	SEQRP Typology
9m	36.80	18.40	14.72	2	0.3	0.5	294	8	Low-rise
12m	59.17	29.59	23.67	3	0.3	0.5	710	12	Low-rise
12m (Mixed Use)	1.04	0.52	0.42	2	0.3	1	17	16	Low-rise
15m	139.56	69.78	55.82	4	0.3	0.8	4,466	32	Medium-rise
15m (Mixed Use)	0.27	0.14	0.11	3	0.3	1	8	30	Medium-rise
18m	20.31	10.16	8.12	5	0.4	0.8	1,083	53	Medium-rise
21m	21.44	10.72	8.58	6	0.4	0.8	1,372	64	Medium-rise
21m (Centre)	4.51	2.26	1.80	5	0.4	1	301	67	Medium-rise
23m	35.85	17.93	14.34	7	0.4	0.85	2,844	79	Medium-rise
23m (Mixed Use)	0.60	0.30	0.24	6	0.4	1	48	80	Medium-rise
27m	9.42	4.71	3.77	8	0.5	0.85	1,068	113	Medium-rise
27m (Mixed Use)	4.93	2.47	1.97	6	0.5	1	493	100	Medium-rise
27m (Centre)	1.20	0.60	0.48	6	0.5	1	120	100	Medium-rise
33m	18.18	9.09	7.27	10	0.5	0.9	2,727	150	High-rise
33m (Mixed Use)	4.36	2.18	1.74	8	0.5	1	581	133	High-rise
33m (Centre)	3.52	1.76	1.41	8	0.5	1	469	133	High-rise
55m	11.19	5.60	4.48	17	0.4	0.8	2,029	181	High-rise
55m (Centre)	0.57	0.29	0.23	15	0.5	1	143	250	High-rise
HX	1.10	0.55	0.44	40	0.8	1	1,173	1,067	High-rise
Total	**374.02**	**187.01**	**149.61**				**19,946**	**53**	

STAGE 3 LIGHT RAIL CORRIDOR - SEQRP DWELLING TYPOLOGY MIX



SEQRP seeks 62% of all new dwelling across City as High-Rise

WHERE TO FROM HERE - THE ALTERNATIVE CASE

- Stage 3 Light Rail Corridor should reasonably be able to accommodate 18.6% (30,200 dwellings) of the Gold Coast's SEQRP dwelling targets to 2046, consistent with Council's extrapolated target.
- Existing development rights should not be prejudiced (ie: equivalent 50% uplift under current provisions) or 50% is effectively built into LR Corridor Building heights (based on existing City Plan height).
- Focus on achieving a suitable proportion of prescribed SEQRP dwelling typologies, noting limited areas in City suitable for High-rise dwellings.
- Identification of "Key Sites" and ability to qualify for such by meeting a specific set of business rules and are capable of accommodating higher yields and building height.
- Bias in favour of Code Assessable outcomes recognizing objective to deliver a large quantity of housing supply quickly.
- With the exception of Key Sites, building heights intended to be the upper limit of building height (ie: no ability to seek additional 50% building height uplift).
- Consideration of commercial feasibility.

ALTERNATIVE CASE – ADDITIONAL CONSIDERATIONS

Key Sites

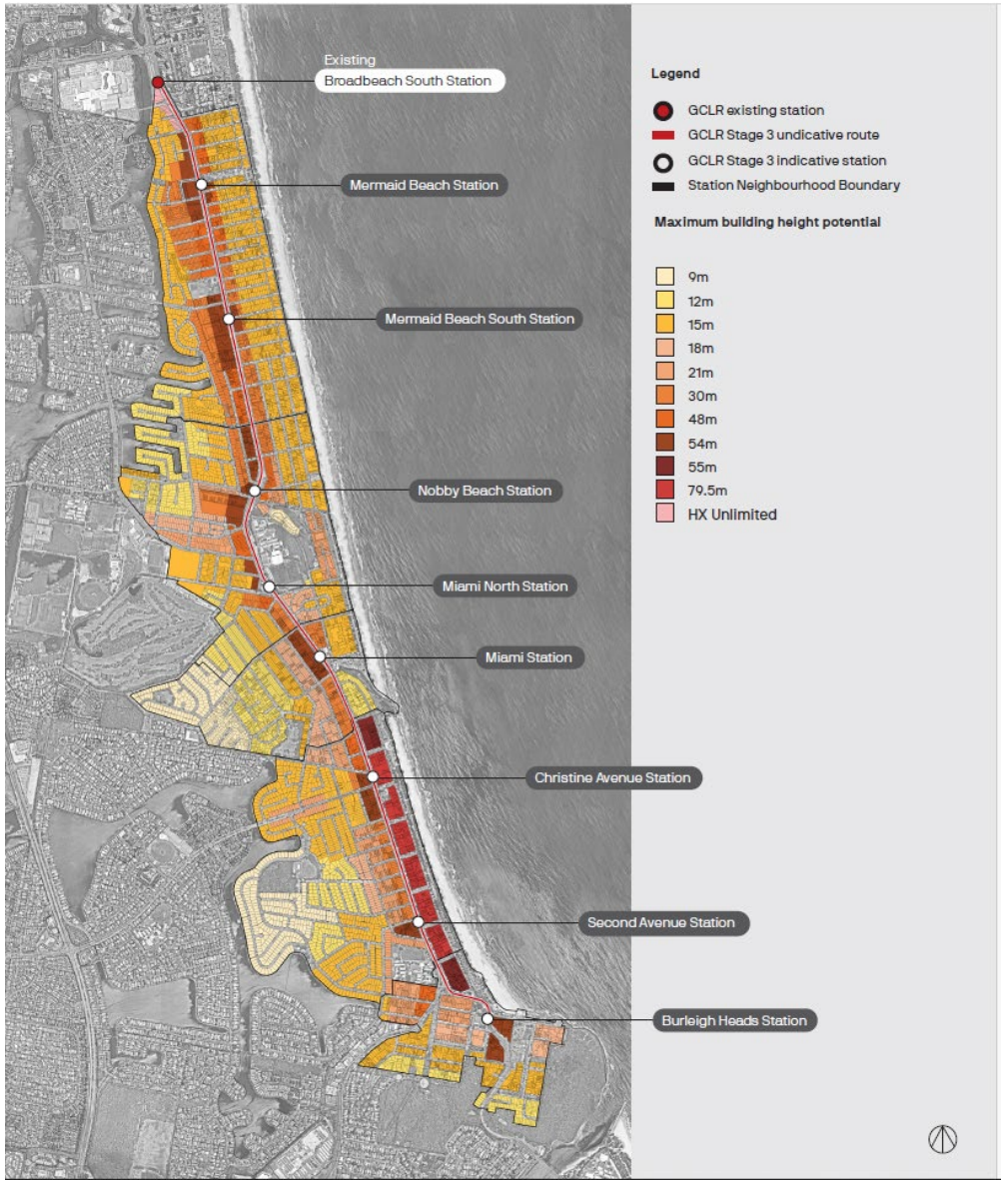
- Minimum area of 2,000m²;
- Proximity to Stage 3 Light Rail Station;
- Gold Coast Highway/Light Rail frontage;
- Minimum mapped building height designation of 30m (based on the 'alternative case');
- Corner location where possible;
- Limited ownership (generally no more than two owners/holdings), or amalgamated as such by a developer;
- Regular site shape which is relatively easy to develop; and
- Low value existing development.

Consideration to 50% Uplift

- Existing development rights (ie: ability to seek 50% height uplift) should not be prejudiced.
- Two key areas where 'base case' Neighbourhood Framework Building heights would result in a lesser building height than the equivalent 50% building height uplift
  - Mixed Use Zoned land generally along the east and west side of Gold Coast Highway in Mermaid Beach / Broadbeach
  - High Density Residential Zone in Burleigh Heads, east of Gold Coast Highway

RESOLUTION OF ALTERNATIVE CASE

- Growth target dwelling supply – 30,200 additional dwellings (18.6% of SEQRP target)
- Make up shortfall of 10,244 dwellings from ‘Base Base’ outcome
- How additional dwelling supply can be achieved – Driven by new SEQRP dwelling typologies, increasing building height is the logical answer
- Consideration to SEQRP Dwelling Typologies and proportional requirements
  - Increase to proportion of High-rise (9+ storey) typology
  - Moderate proportion of Medium-rise typology (4-8 storeys)
- Evaluated methodology and corrected anomalies/inconsistencies
- Focus on “spine” of light rail corridor and around stations
- Treatment of Key Sites and commercial feasibility considerations
- Consideration of existing 50% uplift outcomes
- Level of Assessment - Code Assessable

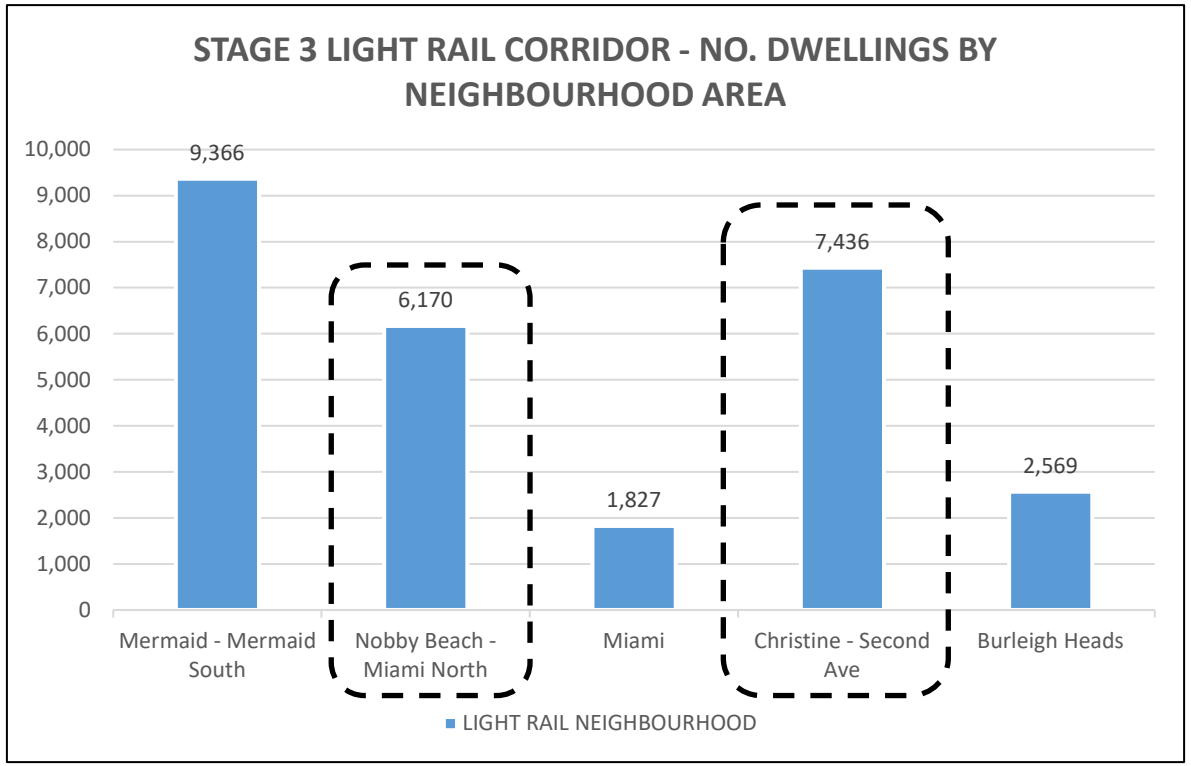


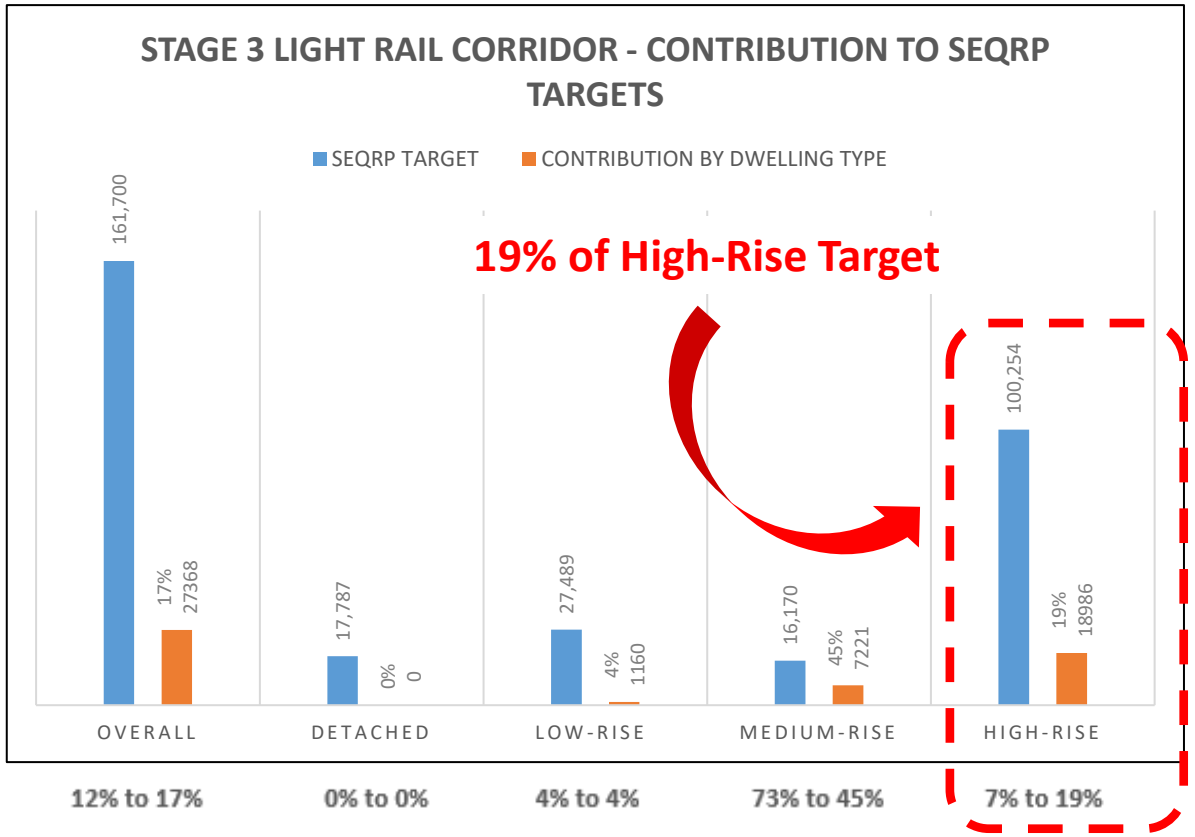
ALTERNATIVE CASE – KEY FINDINGS

➢ **Where we landed**

- **28,548 additional dwellings** at an equivalent average net density of 46.5 dwellings/ha
- Minor shortfall of 1,652 additional dwellings from target outcome of 30,200 additional dwellings

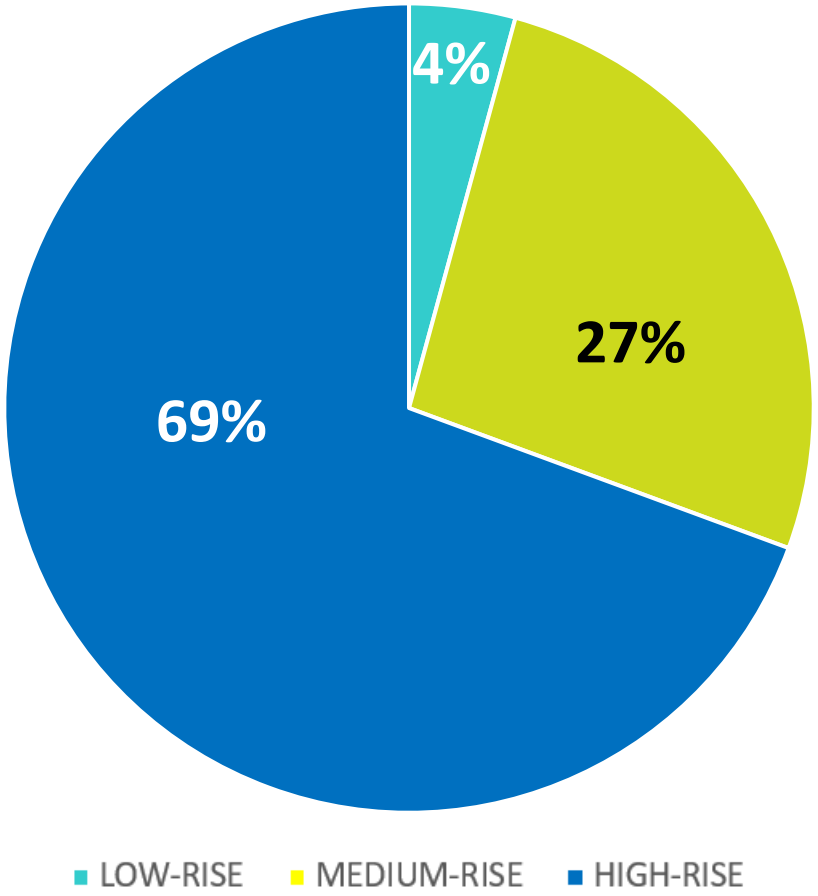
- "Alternative Case" scenario could contribute to **17% of the 161,700 new SEQRP dwelling target**
- Increase from 7% to **19% of the 100,254 new dwelling target for the high-rise attached dwelling typology**
- Decrease from 73% to 45% of the 16,170 medium-rise dwelling typology target



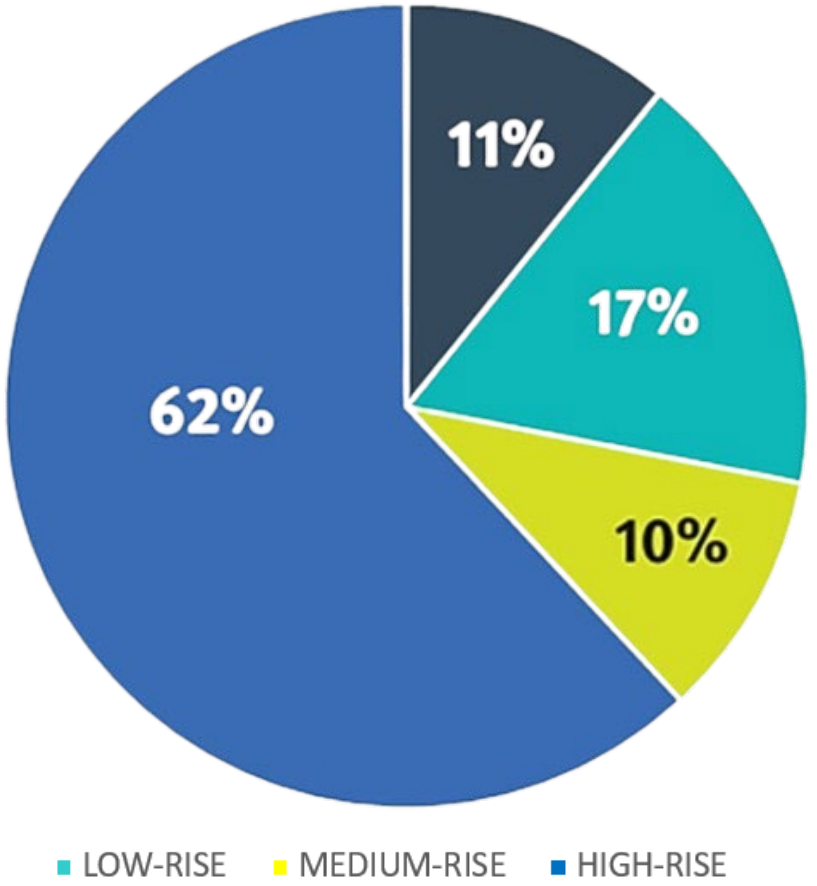


ALTERNATIVE CASE STAGE 3 LIGHT RAIL CORRIDOR VS SEQRP CITY-WIDE TARGETS

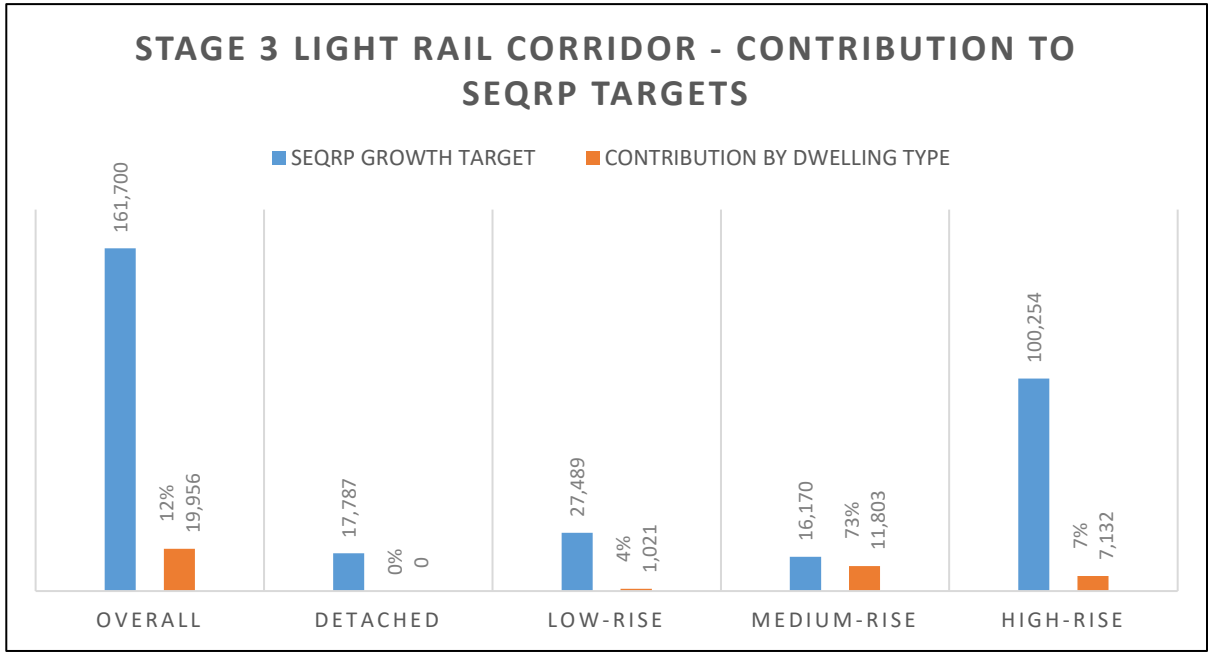
STAGE 3 LIGHT RAIL CORRIDOR - SEQRP DWELLING TYPOLOGY MIX

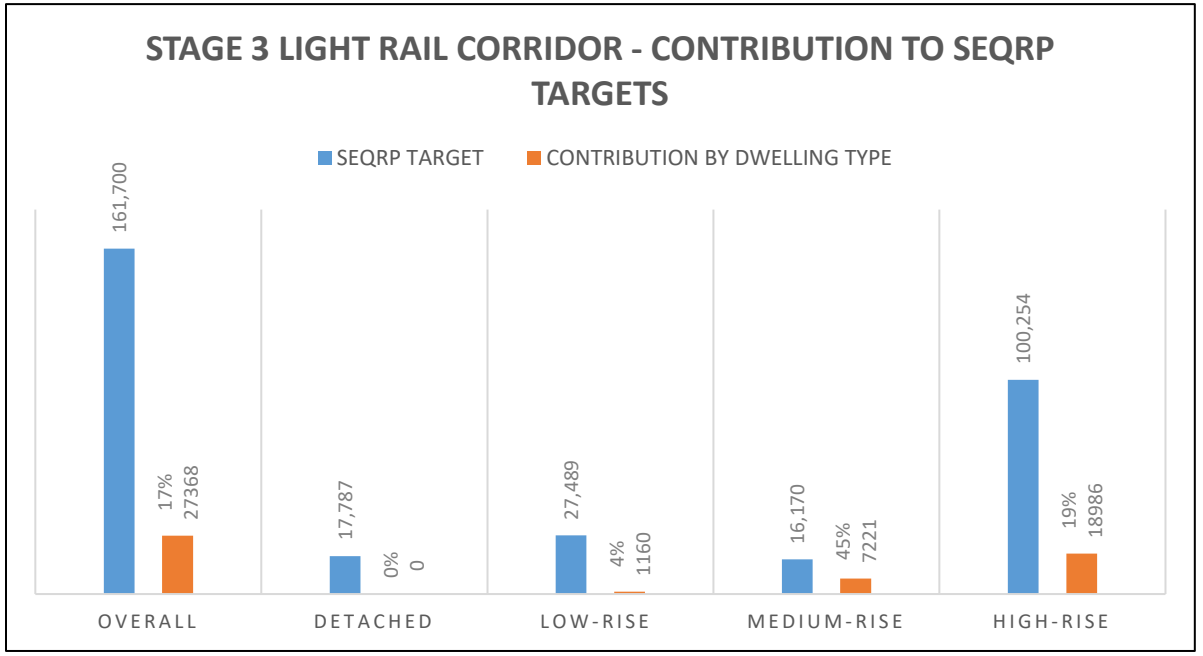


SEQRP 2023 – GOLD COAST DWELLING TYPOLOGY MIX



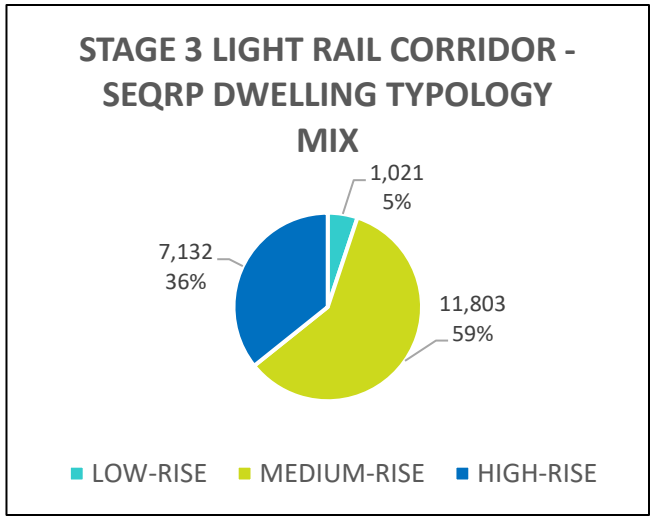
COMPARISON

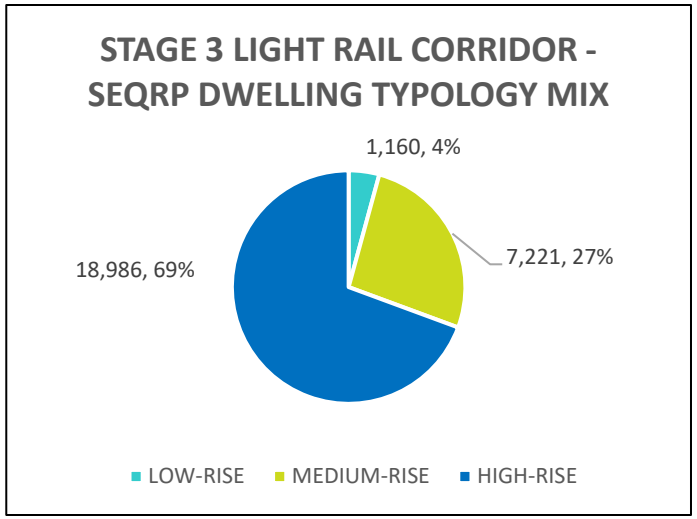




Base Case

19,956 additional dwellings





Alternative Case

28,548 additional dwellings

zone Planning Group

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GET THE FULL REPORT HERE

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