



ORFORD RESIDENTIAL CAPACITY AND DEMAND ANALYSIS

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Independent
insight.



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EXECUTIVE SUMMARY

SGS Economics and Planning was engaged to undertake a residential land demand and supply study for Orford, in response to the proposed planning scheme amendment and subdivision of 14.9 ha of land for a 92 lot residential development along Rheban Road.

The subject land is currently zoned Rural Resource and is proposed to be rezoned to General Residential. In light of that, it is important to consider the relative demand for additional residential land in Orford.

The town of Orford has been experiencing comparatively high demand for dwellings over recent years due to the popularity of the town for retirement, tourism and as a shack community. SGS Economics and Planning, in this report, analysed the demand for dwellings (whether for permanent residents or as holiday homes) in Orford and the residential land capacity in the town to meet this demand. The analysis was performed to understand the need for additional residential land in Orford and as to whether the planning scheme amendment and sub-division is required to meet forecast demand.

A range of factors are considered including government policy, affordability and household composition to draw conclusions on the suitability of the land release in Orford.

The report contains four chapters:

1. Documentation and results of housing demand modelling for Orford
2. Estimation of capacity for new housing in the Orford suburb boundary and assessment as to whether the subdivision is required to meet forecast demand
3. The strategic case for releasing more residential land in Orford
4. Findings and conclusion.

The capacity analysis indicates that currently there is the capacity to provide another 228 to 303 new dwellings in the Orford suburb boundary to 2035 depending on dwelling density and realisation rates. With the proposed sub-division along Rheban Road, 91 lots will be added to this capacity, taking total capacity to 320-395.

Demand for housing in Orford is strong and is driven by both residential demand and tourism/holiday demand. To 2035 it is estimated that there will be demand for another 298 dwellings in the Orford area from 2020, at a two per cent growth rate. This level of demand is higher than foreshadowed in the STRLUS and Triabunna/Orford Structure Plan.

As it currently stands, there is insufficient land available to meet the projected demand within the suburb boundary, according to the low capacity scenario. Without the sub-division there is enough supply to last 11 to 15 years; with the proposal, this rises to 16-20 years.

Between the 2006 and 2016 censuses, the number of dwellings increased by 2.4 percent per annum, as a result of the combined demand for residential and tourism/holiday purposes. If this trend were to continue from 2020, available supply would fall short even earlier.

The Triabunna/Orford Structure Plan states that any residential rezonings undertaken should be timed so as to contribute to the provision of a 15-year supply of land to meet the projected demand. SGS has found that based on recent trends that additional residential land within the Orford suburb boundary needs to be released to meet the Plan's objective of a 15-year supply and the sub-division should be supported.

The proposal is also supported by strategic planning objectives. This includes the intent to consolidate growth into existing towns (urban consolidation) and prevent the continued spread of dwelling growth along the coast and on to productive agricultural land

(fragmentation of productive land). It also encourages growth of the permanent population to improve the economic sustainability and vibrancy of Orford.

We observe that residential demand since 2011 has outstripped the assumed growth as described in STRLUS. SGS Economics and Planning recommends that the STRLUS is updated to reflect higher observed growth and related projections, in Orford and other parts of southern Tasmania. Population growth, the growing desirability of regional Tasmania as a place of residence, the success of the Tasmanian tourism industry and the advent of short-term rental accommodation are more prominent factors in driving demand than recognised in STRLUS.

1. INTRODUCTION

SGS Economics and Planning, in this report, analyse the demand for housing in the Orford area in comparison to the supply of suitable land to understand the need for additional capacity. A range of other factors are considered including government policy, affordability, and the growth of the tourism industry to draw conclusions on the suitability of the land release for 92 residential lots in Orford.

This report contains four chapters:

1. Documentation and results of housing demand modelling for Orford
2. Estimation of capacity for new housing in the Orford urban boundary and assessment as to whether the subdivision is required to meet forecast demand
3. The strategic case for releasing more residential land
4. Findings and conclusion

Housing demand

SGS has created an Excel-based housing demand model for Orford. The model includes the following aspects:

- Population forecasts by age
- Household formation preference
- Housing type preferences

Results include housing demand by type including separate, semi-detached and apartment types.

Housing capacity

PDA has estimated the capacity for new residential development in Orford. Land parcels suitable for additional dwellings have categorised based on its likely timeframe to development and available to the market.

Forecast demand is then compared to housing capacity by timeframe to understand housing market alignment and identify potential gaps/oversupply over time.

Strategic alignment

SGS reviewed strategic planning documents, including the Southern Tasmania Regional Land Use Strategy (STRLUS), and the Triabunna/Orford Structure Plan. Further, SGS has used data from our award-winning Rental Affordability Index to comment on housing affordability.

These and other documents are used to gauge whether the expedited release of land for housing in Orford is supported by policy and trends.

Findings and recommendation

Conclusions and recommendations are drawn concerning the need for the planning amendment and development of a sub-division at Rheban Road, Orford.

2. HOUSING DEMAND

2.1 Introduction and purpose

An assessment of population and demographic trends has been undertaken to develop an understanding of the underlying forces. These forces are driving growth and demand for dwellings in the Glamorgan–Spring Bay LGA and Orford. Beyond population and dwelling forecasts, this section also considers typology and housing choice and housing demand from tourism.

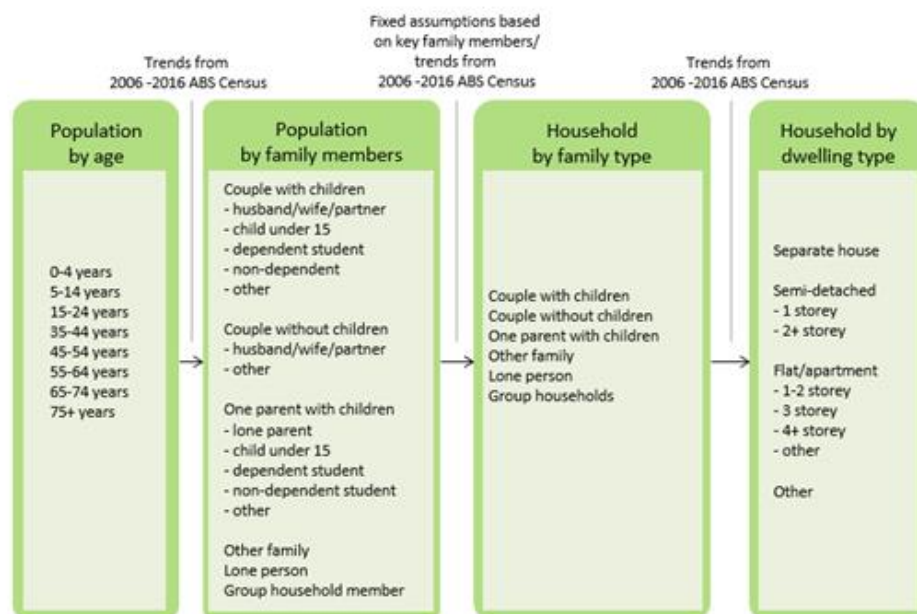
The purpose of the analysis is to forecast housing demand in Orford to the year 2035.

2.2 Approach

The analysis in this section draws upon a range of datasets, mostly from ABS, including population growth, age, family and household type. These core demographic components combine to help understand the drivers for housing demand in Orford presently and into the future.

SGS has applied its in-house and tested *Housing Demand Model* to forecast total demand and demand by dwelling type. The datasets are inputs into the modelling process to help determine the change in the number of households requiring housing in Orford. An illustration of the model below shows the outputs as being housing demand by ‘separate house’, ‘semi-detached’ (referring to attached dwellings, terraces and townhouses), ‘flat/apartment’ and ‘other’ (referring to shacks, caravans and sheds).

FIGURE 1: SGS HOUSING DEMAND MODEL METHOD



Source: SGS Economics and Planning

The model's base scenario is run off historically observed household and dwelling compositions in the LGA. The base scenario generates a 'business as usual' forecast of the

future if there are no major shifts in population/demographic trends or supply/capacity constraints.

The model is initially run at the LGA level as this is the level that population forecasts by age group from the Tasmanian Government are available. Using the outputs for the Glamorgan–Spring Bay LGA, the housing demand for Orford is then calculated with overall growth trends adjusted to reflect the on-the-ground experience local to Orford. The study area is defined in the modelling as the 2011 ABS UCL boundary, which is also the same as ABS suburb boundary in 2011.

The Urban Centres and Localities (UCLs) ABS geography represents areas of concentrated urban development. UCLs are defined using aggregations of SA1s. The size of the UCL of Orford actually increased between 2011 and 2016. For consistency SGS was sure to remove the SA1s added between 2011 and 2016 for a fair comparison (see appendix for discussion on the geography chosen).

2.3 Demand factors

Permanent population growth

Growth in the permanent population of Orford is the key input of the model. The Tasmanian Department of Treasury and Finance has prepared population projections for Tasmania's Local Government Areas for 25 years (2017 to 2042)¹.

The Tasmanian Government's projections have three series, based on different assumptions - high, medium and low. Treasury forecasts for Glamorgan-Spring Bay forecast a medium series annual average growth rate (AAGR) of 0.1% per annum to 2030. For the high series, the AAGR is 0.6% per annum.

Table 1 below shows population forecasts for Orford based on the population at the 2016 census and the population growth rates for the Glamorgan–Spring Bay LGA from the Treasury projections. Using the high series growth rate of 0.6% per annum, the resident population of Orford can be expected to only grow by around 60 people over the twenty years to 2036, assuming an even distribution of growth across the LGA.

TABLE 1: POPULATION GROWTH FORECAST FOR LGA AND ORFORD (TREASURY HIGH SERIES)

Series	2016	2021	2026	2031	2036
Glamorgan/Spring Bay	4,399	4,619	4,760	4,847	4,866
Orford ²	610	614	632	652	671

Source: Tasmanian Government 2019, Census data

In the 2014 population projections by Treasury, the forecast population growth rates for Glamorgan-Spring Bay were even lower. The Treasury projected a 0.2 per cent growth rate under the high scenario and population decline in the medium series.

The Triabunna-Orford Structure Plan uses the State Demographic Change Advisory Council population projections from 2008 (medium growth scenario) to forecast the population of Orford. The population projection for Orford in the Plan (page 19) shows an increase in population from 518 in 2011 to 600 in 2030. This growth of 82 residents over 19 years corresponds to an average annual growth rate of 0.8 per cent per annum.

Figure 2 compares the recent experience in Orford to these government scenarios.

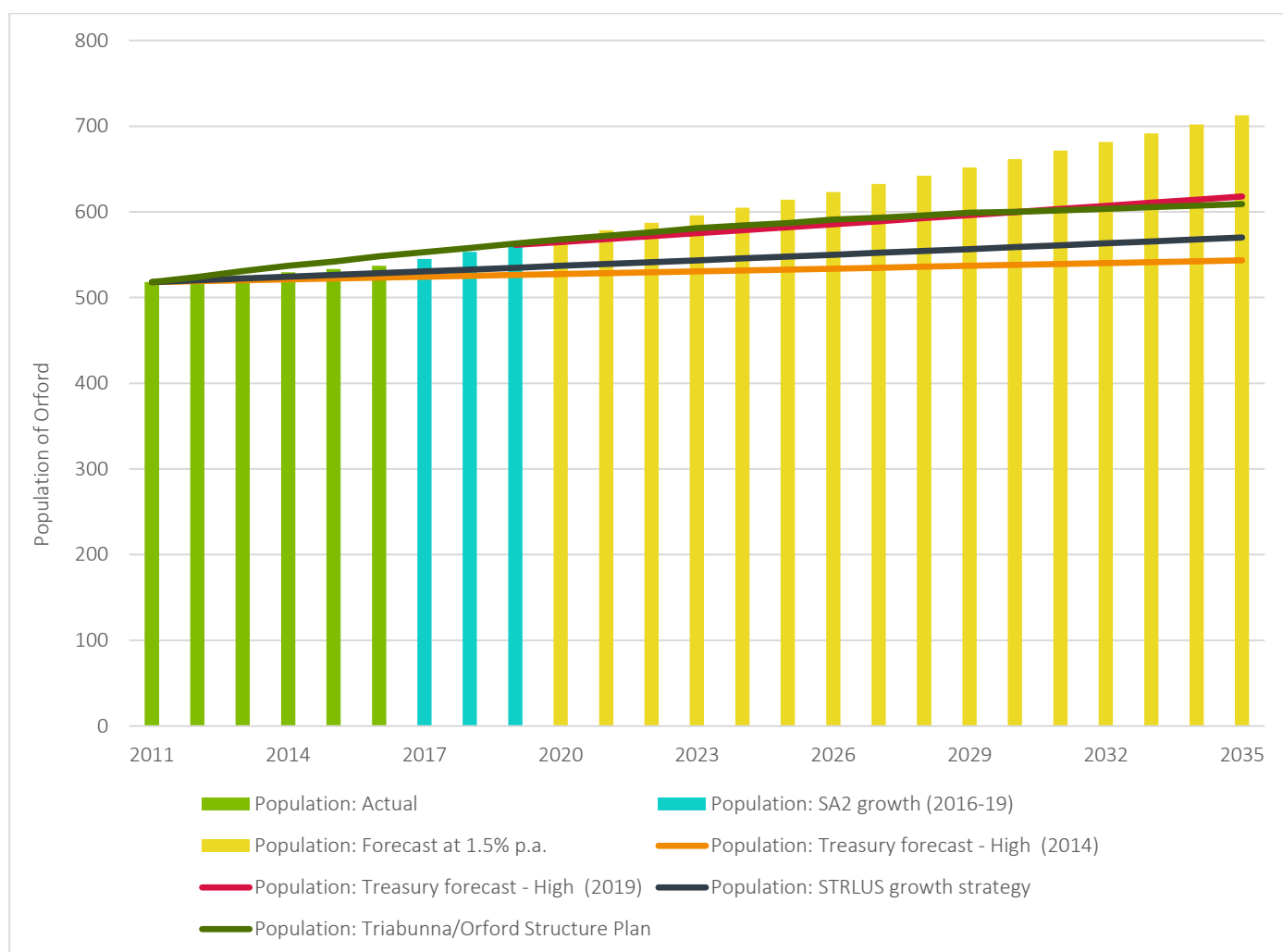
¹ <https://www.treasury.tas.gov.au/economy/economic-data/2019-population-projections-for-tasmania-and-its-local-government-areas>

² 2011 ABS suburb/UCL boundary of Orford

The green bars in Figure 2 represent the actual recorded population of Orford³ derived from place of usual residence data from the 2011 and 2016 census. The real resident population growth in Orford between 2011 and 2016 was 0.7 per cent per annum (AAGR). Since then, the blue bars represent the estimated resident population of Orford for 2017, 2018 and 2019 if the town grew at the same rate as the broader area⁴ of Spring Beach to Bicheno. The Spring Beach to Bicheno area (all in Glamorgan-Spring Bay LGA) grew by 1.5 per cent per annum over these three years⁵. The yellow bars forecast Orford's population forward using these historical growth rates. A growth rate of 1.5 per cent per annum has been used, which is the same as the recent experience in the region.

Overlaying the population projections from Treasury and the Structure Plan over the actual population of Orford, and the forecast, shows that growth in Orford has been trending above the high growth scenario from the 2014 Treasury forecasts for the Glamorgan–Spring Bay municipality and the forecasts used in the Structure Plan (2014). Based on historical growth rates, it is likely that future growth in Orford will also trend above the high scenario from the most recent Treasury forecasts for the LGA (2019).

FIGURE 2: ESTIMATED RESIDENT POPULATION IN ORFORD – ACTUAL AND FORECAST



Source: SGS Economics and Planning, ABS (2020) estimated residential population, ABS Census 2011 and 2016, Tasmanian Government (2019) population projections, Tasmanian Government (2014) population projections, STRLUS (2010), and the Triabunna/Orford Structure Plan (Urbis, 2014).

³ Defined by the 2011 ABS suburb/UCL boundary of Orford

⁴ Defined as the ABS SA2 of Spring Beach to Bicheno. This is the smallest geography that more recent population data is available.

⁵ ABS (2020) Estimated Resident Population for Australian SA2s

Given growth rates experienced since 2011, it can be surmised that Orford is growing in popularity as a place of permanent residence, not just as a shack and holiday home community. A downside of the Treasury projections is that they do not consider internal migration patterns within Tasmania between LGAs. Nor do they capture population changes at a fine grain, such as in individual towns like Orford.

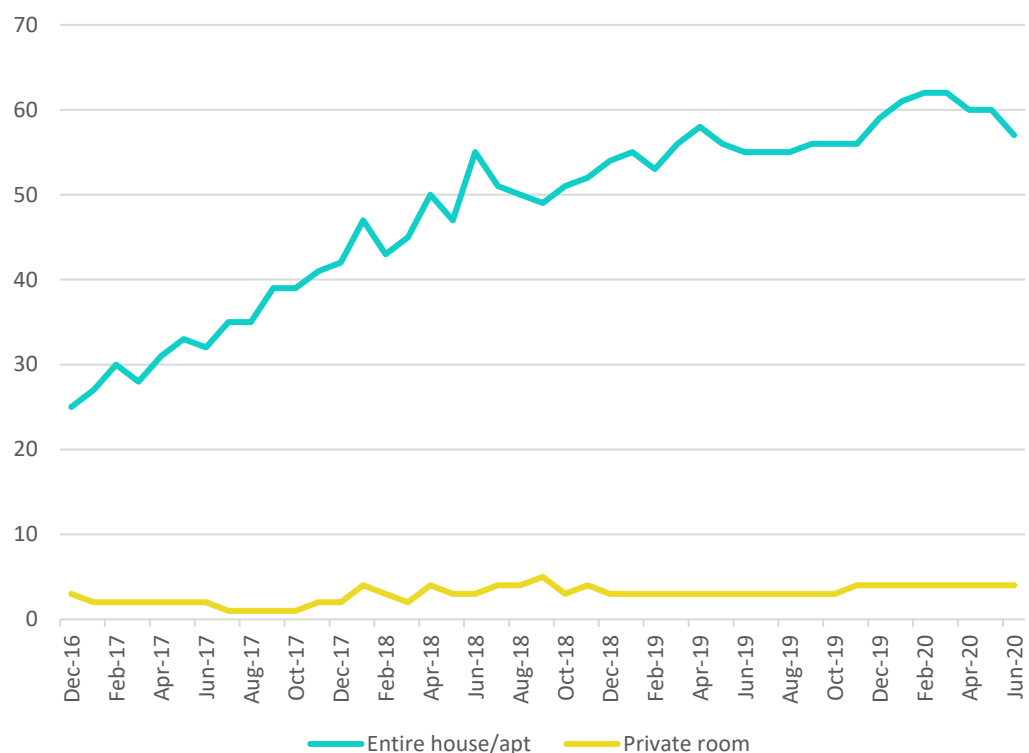
Tourism and holiday letting

Another factor to consider in Orford is the impact of tourism and holiday letting.

Many houses in Orford are used for holiday shacks/homes or holiday letting (Airbnb, Stayz etc.). According to the ABS Census of 2016, 68 per cent of dwellings in Orford were unoccupied on census night, indicating that these dwellings are used primarily as holiday homes. Orford has a much higher rate of vacant dwellings than Tasmania, where 14 per cent of dwellings are unoccupied.

Data from InsideAirBnB⁶ reveals that the number of short-stay rentals in Orford has increased dramatically over recent years, from around 25 entire houses in December 2016 to 57 in June 2020. This represents an increase of 218 per cent in less than four years.

FIGURE 3: NUMBER OF AIRBNB RENTALS IN ORFORD



Source: InsideAirbnb (2020)

The increase in holiday lets is likely from the conversion of existing shacks and dwellings to holiday rentals due to the new technology, as opposed to the construction of new dwellings. Nonetheless, the ability to generate revenue from tourists will make the construction of new shacks more appealing to prospective builders.

Holiday letting apps like AirBnB were not in use when the STRLUS and Structure Plan were drafted. The Structure Plan and STRLUS, though, do both identify tourism and holiday homes as having a large impact on the population size of Orford. The Structure Plan states that

⁶ <http://insideairbnb.com/>

Orford experiences significant population increases in summer months, while the STRLUS identifies Orford as a settlement which is subject to seasonal fluctuations in population.

The decision by the Tasmanian Planning Commission on the proposed rezoning and subdivision stated that dwellings can be used interchangeably as visitor accommodation or residential use, in certain circumstances, meaning that dwelling demand can result from both permanent population growth and seasonal population or visitors (paragraph 31, page 7).

For that reason, in the demand model, SGS has included demand for housing from both resident population and seasonal population/visitors.

2.4 Dwelling growth

A key output of the model is the number of dwellings that will be demanded in Orford to 2035.

The Southern Tasmanian Regional Land Use Strategy designates Orford as a township, primarily for shack/holiday homes and having a low growth rate. Up to a 10 per cent increase in dwellings is allowed over 25 years from 2010 to 2035. This number of dwellings equates to an annual average growth rate of 0.4% per annum.

The Structure Plan contends that Orford provides residential options that are popular with retirees, holidaymakers, and commuters to Hobart.

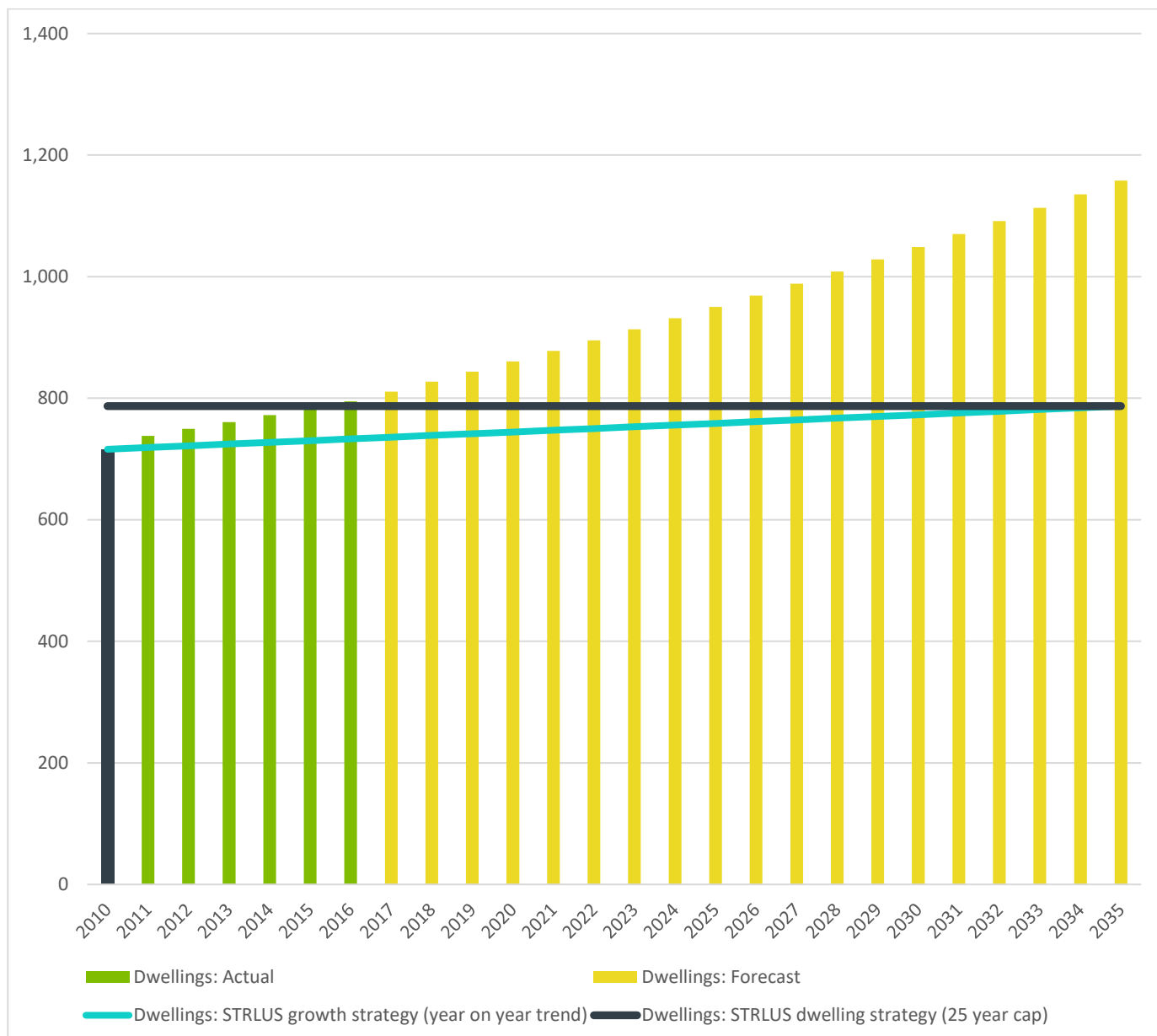
Figure 4 below shows the actual and forecast demand for dwellings in Orford⁷. In the figure:

- The first pink bar shows the number of dwellings (716) in Orford at the time the STRLUS was adopted, as outlined in the Planning Commission's decision on the Rheban Road subdivision from 24 July 2019 (paragraph 28, page 7).
- The green bars show the number of dwellings in Orford as derived from the ABS census, using the 2011 Orford suburb/UCL boundary. According to census data, the number of dwellings in Orford grew from 625 to 795 in the ten years years between 2006 and 2016, at an average annual growth rate of 2.4 per cent. Between 2011 and 2016 only, the growth rate was lower at 1.6 per cent per annum.
- The yellow bars represent a forecast of the number of dwellings based on these recent historical trends, but also changing economic and societal trends since the last census in 2016. A growth rate of 2 per cent is forecast, which includes an increase in dwellings for permanent residents as well as for tourism and holiday rentals. For further explanation on why a forecast growth rate of 2 per cent was used refer to the appendix.
- The black horizontal line across the chart shows the STRLUS dwelling growth strategy, which was for a 10% increase over 25 years. The blue line shows the year on year growth trend to stay under this cap (0.4% per annum).

The chart shows that the growth scenario used in the STRLUS for Orford is unsuitable. The number of dwellings to be allowed in Orford over 25 years was reached within 3-4 years, with growth continuing.

⁷ Defined by the 2011 ABS suburb/UCL boundary of Orford

FIGURE 4: NUMBER OF DWELLINGS IN ORFORD - ACTUAL AND FORECAST



Source: SGS Economics and Planning, ABS Census 2011 and 2016, STRLUS (2010)

Since the release of the STRLUS, a host of factors have contributed to making Tasmania and Orford more desirable places to live, including:

- The rise of Tasmania as a destination for tourism and interstate migration, sometimes dubbed to MONA effect
- The affordability of Tasmania's real estate compared to the mainland, but then, in turn, the affordability of Orford versus Hobart
- The aging of the population and increasing demand for a 'sea change'
- Shifting preferences for working from home for work-life balance and lifestyle enabled technology advancements and sped up by COVID-19. These change preferences are increasing demand for housing in regional settlements with high amenity but within 90 minutes of major cities like Hobart.

For that reason, SGS makes an assessment on the merits of the proposed sub-division based purely on supply and demand driven by recent trends. Not the growth strategy outlined in STRLUS, which is out of date, or the Treasury forecasts, which are inaccurate at a local level.

Final housing demand model results

Table 2 summarises the results of the housing demand modelling completed by SGS. The results are derived from the *Housing Demand Model*. The model uses ABS Census data patterns in demographics, and housing types from 2001 to 2016.

The model reflects a dwelling demand growth rate of 2.0 per cent per annum which includes permanent population growth and growth in holiday homes and holiday rentals. The results are displayed considering dwelling preferences. The results indicate that while the highest growth rate between 2020 and 2035 is likely to be for semi-detached dwellings (10.2 per cent per annum), the dwelling mix in Orford will still be dominated by detached (separate house) dwellings. Demand for detached dwellings is expected to grow 1.9 per cent per year between 2020 and 2035.

The preference for separated houses in Orford will drive demand for 263 residential lots to 2035. The projected demand for semi-detached, flat/units, and other dwellings types adds to demand by another 30 dwellings to 2035. The other category includes caravans and sheds, which are often built on lots of land and used for holidays and camping, and usually converted to permanent dwellings over time.

TABLE 2: DWELLING DEMAND FORECAST 2020 TO 2035 (SGS HOUSING DEMAND MODEL OUTPUT)

Dwelling type	2016 (actual)	2020	2025	2030	2035	2020- 2035 demand	AAGR 2020- 2035
Separate house	744	805	883	952	1,068	263	1.9%
Semi Detached	8	9	20	29	39	30	10.2%
Flat, unit or apartment	5	5	5	6	6	1	1.4%
Other	38	41	42	42	45	3	0.5%
Total	795	861	950	1,028	1,158	298	2.00%

Source: SGS Housing Demand Model (2020)

If its assumed that the popularity of Orford for permanent residents in comparison to holiday homes remains constant over time (i.e. 68 per cent of dwellings are used for holiday homes and holiday rentals) then demand for permanent dwellings increases by 95 to 2035 and by 202 for holiday homes and rentals (Table 3).

TABLE 3: DWELLING DEMAND FORECAST 2020 TO 2035 – DWELLING USE

Dwelling use	2016	2020	2025	2030	2035	2020 - 2035 demand	AAGR 2020 - 2035
Permanent resident dwellings	254	275	304	329	371	95	2.0%
Holiday homes and holiday rentals	541	585	646	699	788	202	2.0%

No matter the use, in total, 298 new dwellings are forecast to be demanded to the year 2035 in Orford from 2020. These demand forecasts are compared to available capacity (next) to determine whether there is an adequate supply of residential land in Orford to meet this forecast demand.

3. HOUSING SUPPLY AND FUTURE CAPACITY

3.1 Introduction and purpose

This chapter identifies available vacant residential land in Orford ready for development in the immediate, medium and longer-term. PDA Surveyors was commissioned to undertake an assessment of the available vacant residential supply in Orford. They assessed the availability of the supply for development in the short, medium and long term. PDA undertook a desktop analysis and site visits to understand the extent of land available for residential dwelling development.

The purpose of the analysis is to reveal the capacity for new housing in the suburb/UCL boundary of Orford to 2035 and compare to housing demand to ascertain whether new parcels of land should be released. It is vital to ensure land supply is consistent and sufficient, properly located and readily developable to meet population demand as forecast.

3.2 Housing capacity

According to the 2016 census there were 851 dwellings in Orford. As explored in the demand chapter, demand for new dwellings in Orford has been strong. The Council has identified in the Structure Plan that a fifteen-year supply of residential land is required for Orford.

Housing development capacity in Orford urban area

Vacant land supply

The total number of potential vacant residential land, the theoretical supply, consists of residential zoned land that is vacant. This includes the consideration of subdivision potential based on lot sizes.

The practical, or realistic supply, takes additional factors into consideration: the availability of supply over time, and the propensity of property owners to subdivide land or not. Some property owners prefer to have a large garden and may choose to not subdivide.

In determining the supply of residential land for development, it is important to assess the availability of supply over time. For instance, un-serviced large lots that have not yet been subdivided, are unlikely to become available for development in the short term⁸.

To understand the housing capacity of Orford, PDA Surveyors completed an assessment of the feasibility of vacant and potential land being converted into new lots. The evaluation was done using a desktop review, existing expertise and site visits. The site visits were undertaken in July 2020.

PDA reviewed 227 parcels of land in the Orford ABS suburb boundary which are zoned for residential purposes (excluding the parcels which are the focus of this study).

PDA listed all vacant lots, greenfield options and infill options within the suburb area of Orford. Each parcel was assessed for the number of lots that may be created, and how feasible the creation of the lots is based on a range of factors including infrastructure provisioning, planning restrictions and lot layout.

⁸ Rezoning and infrastructure provision require time and resources

Parcels of land were sorted into different categories:

- Vacant lots (immediate supply)
- Land that is serviced and easy to sub-divide and/or develop (short term supply)
- Land that is serviced but with constraints and possible higher development costs (medium-term supply)⁹
- Land that is difficult to develop (long term supply)¹⁰

There are two other categories. Lots that are already under development and lots with a shed or caravan on them. These categories are excluded from the vacant capacity estimates. Lots under development are no longer available to meet demand and lots with sheds or caravans are being used mainly as shacks (which is a residential use) and may be developed further in the future. The ABS count these as dwellings (as “other dwellings”).

The theoretical maximum number of lots by category are shown in Table 4. In total, the parcels of land in Orford could be developed into 436 lots for dwellings, with around 56 per cent being lots sub-divided from serviced and easy to develop land (available for development in the short term). Approximately 18 per cent are already subdivided vacant lots ready for development.

TABLE 4: NUMBER OF DEVELOPABLE LOTS IN ORFORD

Land parcel type	Total lots
Vacant lots	78
Serviced and easy to develop	242
Parcels with development constraints	87
Difficult to develop	29
Total	436

Theoretical dwelling capacity

Based on past experience, it is known that not all subdividable parcels will actually be subdivided and made available for development. PDA assessed the likely realisation rates in combination with development timing to estimate the likely capacity. The capacity was estimated in a range with high and low capacity scenarios.

PDA estimated that:

- The majority of vacant lots will slowly be developed for holiday home or permanent residential dwelling use over the next two decades. PDA estimates that many lots have been bought as a retirement plan, with the owner to move up to Orford at some time in the future. Given that these lots are vacant and ready for development, the realisation rate is 100 per cent for both scenarios as the lots have been realised, they just remain vacant.
- The parcels that are easy to sub-divide into two or three lots (serviced and easy to develop) will have a high (75%) realisation rate in the next 15 years. Many owners of these parcels will see the benefit in reducing debt levels or realising cash potential in a highly sought-after holiday home area. These lots will be staggered due to the different circumstances of the owners and will not flood the market but will drip feed into it. For the lower capacity scenario, it is assumed the realisation rate will be 50 per cent reflecting more landowners may choose to maintain their large block size than estimated in the high scenario.

⁹ Development constraints identified by PDA that can be overcome in the medium term include coastal erosion overlays and the need for internal roads to open up the site for development.

¹⁰ Development constraints that are difficult to overcome include heritage listings and steep slopes.

- Lots with some development constraints have an assumed realisation rate of 50 per cent for the high scenario and 33 per cent for the low scenario in the next fifteen years.
- Lots that are difficult to develop are assumed to not be available for dwelling development over the next 15 years due to the constraints and supply of much easier to develop parcels.

After applying the above realisation rates to the overall number of lots by category gives the high and low capacity for new dwellings in Orford over the next 15 years (Table 5). It shows that in the low scenario, there is a capacity for 228 new dwellings.

With higher realisation rates, the capacity in Orford is for 303 new dwellings. These scenarios can be thought of as a range, with the likely capacity falling somewhere in between.

TABLE 5: DWELLING CAPACITY IN ORFORD (2020-2035)

Lot type	Low	High
Vacant lots	78	78
Serviced and easy to develop	121	182
Lots with development constraints	29	44
Difficult to develop	0	0
Total	228	303

Allocating the above capacity to five-year time blocks results in the dwelling capacities below in Table 6:

- In the short term (2021 to 2025) there is an immediate capacity for 78 new dwellings on the vacant lots.
- In the medium term (2026 to 2030), when easy to sub-divide parcels are developed, there is additional capacity for another 121-182 dwellings depending on the capacity scenario.
- In the longer-term (2031 to 2035), as lots with development constraints are made available, there is capacity for a further 29-44 dwellings.

TABLE 6: DWELLING CAPACITY IN 5-YEAR INTERVALS

	2021-2025	2026-2030	2031-2035	Total
New dwelling capacity (Low)	78	121	29	228
New dwelling capacity (Higher)	78	182	44	303

Comparison to housing demand

As revealed in chapter 2, the demand for dwellings in the Orford area has been high in recent years. High demand is forecast to continue (Table 2). Table 7 shows the dwelling demand in Orford compared the dwelling capacity over the five-year intervals. The results show that:

- In the high capacity scenario, capacity is sufficient in the medium term to meet new demand. However, in the short term, and particularly in the longer term there is undersupply in meeting the forecast demand. Overall, over the 15 years supply is tight, with supply being 5 lots above demand. This result though relies on high realisation rates, where most parcels (75 per cent) of easy to sub-divide land are actually developed in the next 15 years. With high capacity, it would take 15 years for the available lots to be fully developed.
- In the low capacity scenario, there is insufficient capacity in Orford to cater for demand. With low capacity, which sees many 50 per cent of lots that could be sub-divided being

actually developed in the next 15 years, supply is 70 lots lower than demand. With low capacity, the supply of land is 11 years, below the 15-year target of Council.

TABLE 7: DWELLING DEMAND IN 5-YEAR INTERVALS COMPARED TO DWELLING CAPACITY

	2021-2025	2026-2030	2031-2035	Total
New dwelling demand in Orford	90	78	130	298
New dwelling capacity (low)	78	121	29	228
New dwelling capacity (high)	78	182	44	303
Supply gap: Low capacity scenario	-12	43	-101	-70
Supply gap: Higher capacity scenario	-12	103	-86	5

If the low scenario eventuates, the lack of supply presents challenges to new residents looking to move to Orford. These new residents may choose to not move to Orford or may move outside of the suburb boundary further along the coast or into agricultural areas.

Even the high capacity scenario presents challenges. Without new land releases, supply will fall below the 15-year target in the near future.

Impact of land release at CT 149641/2, Rheban Road, Orford

If approved, the proposed rezoning and subdivision of 14.9 ha of land along Rheban Road will add 92 new lots to the dwelling capacity in Orford.

Assuming that these lots are released over the short and medium-term to 2030, housing capacity increases to 320 under the low scenario (Table 8), and 395 under the higher scenario.

TABLE 8: DWELLING CAPACITY IN 5-YEAR INTERVALS WITH ADDITIONAL LOTS

	2021-2025	2026-2030	2031-2035	Total
Dwelling capacity (Low)	124	167	29	320
Dwelling capacity (High)	124	228	44	395

Comparing these dwelling capacity scenarios with demand shows that the proposed subdivision reduces capacity constraints for housing in Orford (Table 9). In a low-capacity scenario with the subdivision, the supply of land increases to 16 years.

For the higher end of the range, the development of the new lots increases capacity over the demand to 113 lots over the next fifteen years, representing a supply of 20 years.

TABLE 9: DWELLING DEMAND IN 5-YEAR INTERVALS COMPARED TO DWELLING CAPACITY WITH SUB-DIVISION

	2021-2025	2026-2030	2031-2035	Total
New semi-detached dwelling demand in Orford	90	78	130	298
New dwelling capacity with sub-division (low)	124	167	29	320
New dwelling capacity with sub-division (high)	124	228	44	395
Supply gap: Low capacity scenario	34	89	-101	22
Supply gap: Higher capacity scenario	34	149	-86	97

Given that the Council has identified in the Structure Plan that a fifteen-year supply of residential land is required for Orford, the new subdivision is required to alleviate the risk of undersupply if capacity is at the lower end of the range.

The low number of permanent residents and the aging of the population in Orford also requires careful consideration. The early release of new residential lots can help attract permanent residents and families to Orford. The attraction of new permanent residents would improve the economic vitality of Orford, which is currently heavily impacted by seasonal fluctuations in population.

4. STRATEGIC ALIGNMENT

4.1 Introduction and purpose

This section reviews relevant planning documents and other factors to check their alignment with the release of additional residential land earlier in Orford.

4.2 Planning Policy

Southern Tasmania Regional Land Use Strategy (STRLUS)

This Regional Land Use Strategy is a broad policy document that will facilitate and manage change, growth, and development within Southern Tasmania, including Orford over the next 15 years (to 2035).

The STRLUS provides a regional vision of *“a vibrant, growing, liveable and attractive region, providing a sustainable lifestyle and development opportunities that build upon our unique natural and heritage assets and our advantages as Australia’s southern most region.”* (p.17)

The location, form, type and density of residential development is a significant land use planning issue addressed in the STRLUS. Residential patterns impact on:

- the extent of urban development
- the economic and environmental sustainability of our overall urban form
- travel behaviour and the demands upon the transport system
- the location and capacity of the physical infrastructure
- demand for social services and infrastructure
- impacts upon the natural environment and its values
- managing for, mitigating or adapting to natural hazards and risks
- the capacity to accommodate a growing and ageing population; and importantly
- the resilience of the community to climate change (p. 84).

In STRLUS, it is argued that contemporary imperatives of climate change, changing demographics, rising infrastructure costs and environmental management require a more sustainable approach to residential growth. Given these and the above factors, the Strategy promotes consolidation of existing settlements and minimisation of urban sprawl and lower density development (p. 85).

Another factor outlined in the STRLUS is that population growth in a particular location can be strongly influenced by the availability and cost of residential development opportunities (p.11). Population growth is important for Orford to counteract the seasonal fluctuations in population due to being a settlement predominantly for holiday homes at present. More permanent residents would make the town more economically sustainable.

The STRLUS also maps out a Settlement Network to define the future role and function of each of the region’s settlements. Each settlement has a growth management strategy and growth trajectory (high, moderate, low, very low). The growth scenarios are also categorised into mixed and consolidation. A mixed growth scenario indicates that residential growth should come from a mix of both greenfield and infill and the consolidation scenario indicates that growth should be predominantly from infill development (p. 86).

Orford is defined as a township. Townships are residential settlements with prominent town centres providing a number of facilities, some local employment opportunities and convenience shopping. Townships have a population of 500 to 1,500 excluding surrounding

rural living. The growth trajectory for Orford is identified as low (up to 10 per cent increase in the number of potential dwellings over 25 years) via a consolidation scenario.

A 10 per cent increase over 25 years (the length of the strategy) corresponds to an annual average growth rate of 0.4 per cent per annum for Orford. The number of dwellings at the start date was 716. Therefore, the regional strategy provides for a maximum of 71 new dwellings from 2010 to 2035. As explored in the Housing Demand chapter, this is well below the recent and current experience in Orford. This means that more growth will be needed to be accommodated in Orford than outlined in the STRLUS.

The STRLUS does state that for all settlements categorised as ‘township’ or lesser (like Orford), the growth strategy indicated does not preclude growth possible under existing capacity (page 89). This means that growth can be, and is, being accommodated above the 10 per cent cap.

Even so, residential demand in Orford is well beyond what was anticipated in STRLUS and freeing up more land within the suburb boundary prevents growth spilling over into productive agricultural land, further along the coast and in natural living areas around Orford. This enables the town to retain its character in a natural landscape while improving the towns economic sustainability by adding more residents.

Triabunna/Orford Structure Plan

In order to ensure that the town’s future is planned for and managed in a coordinated manner, the Glamorgan Spring Bay Council and the Department of Economic Development, Tourism and the Arts engaged Urbis to prepare a Structure Plan for Triabunna and Orford. The Structure Plan provides a vision for future land use and development within Orford to 2030. The first version of the Structure Plan was released in 2011 and updated in 2014.

The Structure Plan is in broad alignment with the STRLUS.

The reduction in population during winter months as holiday homes are vacated is a weakness for Orford identified in the Structure Plan. The potential for lack of permanent residential population throughout the year, as holiday home accommodation increases identified as a threat.

The vision in the Strategy is that Triabunna and Orford will provide a sustainable lifestyle and destination choice that realises the potential of their natural assets and links to convict, maritime and forestry history (page 52). Orford’s future will focus on:

- Providing a beach lifestyle choice for residents and visitors; and
- Retaining its character as a place where the bush meets the sea.

Based on modelling in the Plan, the total number of new dwellings required for both place of usual residence and holiday houses in Orford by 2030 is 129 (from 2011). It is assumed that 39 will be places of residence while 90 will be new holiday homes (page 48). Taking into account the estimated potential supply of residential land (existing supply of up to and around 445 dwellings), the Plan stipulates that it would appear that current supply is more than sufficient to accommodate the projected dwelling take-up to 2030 in Orford.

The implications of this are the need for:

- The provision of land for permanent homes and holiday homes
- The provision of land for at least 199 and possibly up to and in excess of 289 additional dwellings.
- Ongoing monitoring of the demand for and supply of dwellings will be necessary to determine how much residential land should be made available (page 48).

The recommended option for Orford is for the promotion sustainable land use through infill development and unit developments around the town centre. Recommendations for Orford include setting an urban growth boundary to ensure the sustainable and efficient use of land;

and that Orford is maintained as a predominantly residential settlement with strict urban boundaries to limit the extent that the town spreads along the coast.

Any residential rezonings undertaken should be timed so as to contribute to the provision of a 15-year supply of land to meet the projected demand. The Plan states that given the vacant land analysis indicates there are currently many potential infill development opportunities, these rezonings may not need to occur for a number of years.

SGS's analysis though reveals that dwelling demand has been higher than forecast in the Structure Plan, and that there is possibly an insufficient supply of land in Orford over the next 15 years to meet demand for residential dwellings (depending on the capacity scenario). Additional residential land within the Orford suburb boundary would need to be released to meet the Plan's objective of a 15-year supply, supporting the need for the proposed subdivision.

Housing affordability and choice

High rents, relative to household incomes, has seen Greater Hobart become the least affordable metropolitan area in Australia for renting. Many homes have also been converted to short-term holiday rentals. Households are looking to the Glamorgan–Spring Bay for more affordable housing options. According to the rental affordability index¹¹, Orford has an acceptable level of affordability, but this will be impacted over time if there is a shortage of housing in comparison to demand as identified by SGS in the proceeding chapter. Rental affordability provides the best insight into the relation of residential demand and supply, as its affordability level is not distorted by property speculation and wealth creation considerations.

Already, rental affordability for the average income rental household has dropped markedly in Orford from being 'very affordable' in the second quarter of 2017, to 'acceptable' by the fourth quarter in 2019. For some household types, rents have already become unaffordable, where households pay more than thirty per cent of their income in rent. This leaves them with insufficient funds to pay for other primary needs such as heating, medical needs, education and transport.

A sufficient supply of land for residential housing places downward pressure on housing costs, further supporting the need for new land release.

4.3 Tasmanian Planning Commission's decision

The regional growth management strategy in section 19.5.2 sets out that a low growth strategy allows less than 10% increase in the number of potential dwellings. The percentage growth is calculated as the increase that can occur across a 25-year planning period from the number of dwellings existing at the declaration date

The Commission noted that the permit is for 91 residential lots. This is greater than the maximum number of new dwellings (assuming at least 1:1 lots to dwellings) allowed for in the regional strategy to 2035.

The Commission found that the draft amendments are not consistent with the low growth strategy applicable to Orford under the regional strategy.

SGS agrees that the draft amendments are not consistent with the low growth strategy applicable to Orford in the STRLUS but argues that the growth scenario for Orford does not actually capture the recent experience in the town.

In considering the application for the rezoning, the Commission was not convinced by submissions that there is not sufficient zoned land for a 15-year supply of land in Orford and therefore considers that the draft amendments are premature. SGS's analysis also found that

¹¹ <https://www.sgsep.com.au/projects/rental-affordability-index>

there is likely insufficient land for a 15-year supply if recent trends in dwelling growth continues

On the use of dwellings for holiday letting and shacks, the Commission noted that dwellings can be used interchangeably as visitor accommodation or residential use, in certain circumstances, meaning that it is irrelevant to consider that dwellings will be solely used for either permanent residences or shacks.

The Commission considers that nothing turns on the difference between permanent residences and holiday dwellings and notes that both are included in the supply and demand calculations in the structure plan.

SGS in the analysis has also treated holiday homes and permanent residencies as the same but notes that the success of the Tasmanian tourism industry and the advent of online platforms for short-term rental accommodation are bigger factors in driving demand up than recognised in the Structure Plan and STRLUS.

4.4 Conclusion

The proposed subdivision at CT 149641/2, Rheban Road, Orford is within the suburb boundary for Orford but zoned rural resource.

The Triabunna/Orford Structure Plan states that any residential rezonings undertaken should be timed so as to contribute to the provision of a 15-year supply of land to meet the projected demand. SGS has found that based on recent that additional residential land within the Orford suburb boundary needs to be released to meet the Plan's objective of a 15-year supply.

The STRLUS promotes consolidation of existing settlements and minimisation of urban sprawl. Though not infill, the development is within the suburb boundary for the town and the use of the land will consolidate the township over the surrounding regional area, including steering growth away from continued spread along the coast and onto productive agricultural land.

SGS concludes that the proposed subdivision does not meet the growth scenario outlined in STRLUS for Orford. However, we observe that residential demand since 2011 has outstripped the assumed growth as described in STRLUS. Population growth, the success of the Tasmanian tourism industry and the advent of online platforms for short-term rental accommodation are more prominent factors in driving demand than recognised in STRLUS.

The STRLUS also outlines that population growth (a positive influence for Orford for the economic sustainability of the town) can be strongly influenced by the availability and cost of residential development opportunities. This supports the release of additional land for residential uses in Orford.

5. FINDINGS AND RECOMMENDATION

The capacity analysis indicates that currently there is the capacity to provide another 228 to 303 new dwellings in the Orford suburb boundary to 2035 depending on dwelling density and realisation rates. With the proposed sub-division along Rheban Road, 91 lots will be added to this capacity, taking total capacity to 320-395.

Demand for housing in Orford is strong, and is driven by both residential demand and tourism/holiday demand. To 2035 it is estimated that there will be demand for another 298 dwellings in the Orford area from 2020, at a two per cent growth rate. This level of demand is much higher than foreshadowed in the STRLUS and Triabunna/Orford Structure Plan.

As it currently stands, there is insufficient land available to meet the projected demand within the suburb boundary, according to the low capacity scenario. Without the sub-division there is enough supply to last 11 to 15 years; with the proposal, this rises to 16-20 years.

Between the 2006 and 2016 censuses, the number of dwellings increased by 2.4 percent per annum, as a result of the combined demand for residential and tourism/holiday purposes. If this trend were to continue from 2020, available supply would fall short even earlier.

The Triabunna/Orford Structure Plan states that any residential rezonings undertaken should be timed so as to contribute to the provision of a 15-year supply of land to meet the projected demand. SGS has found that based on recent trends that additional residential land within the Orford suburb boundary needs to be released to meet the Plan's objective of a 15-year supply and the sub-division should be supported.

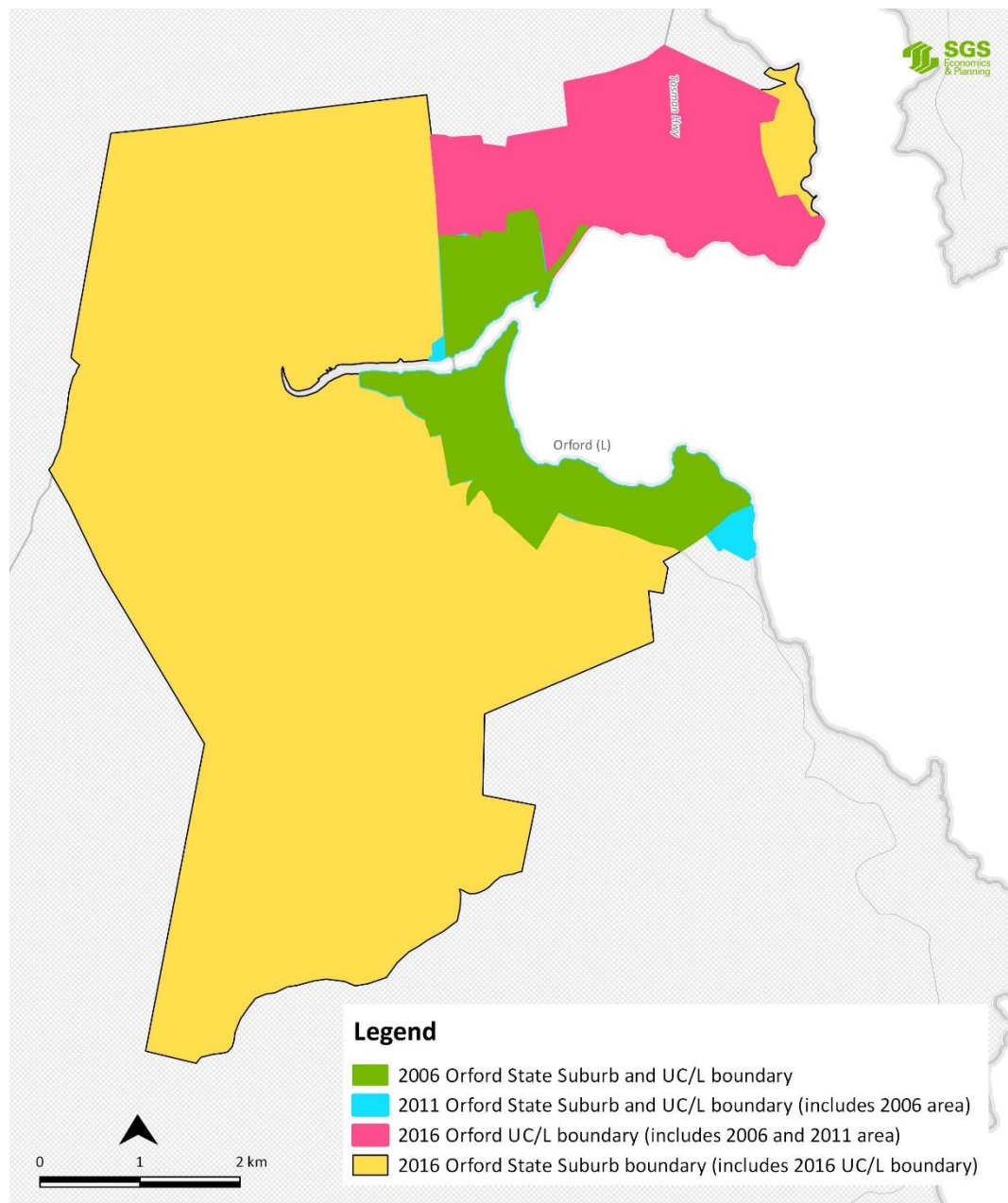
The proposal is also supported by strategic planning objectives. This includes the intent to consolidate growth into existing towns (urban consolidation) and prevent the continued spread of dwelling growth along the coast and on to productive agricultural land (fragmentation of productive land). It also encourages growth of the permanent population to improve the economic sustainability and vibrancy of Orford.

We observe that residential demand since 2011 has outstripped the assumed growth as described in STRLUS. SGS Economics and Planning recommends that the STRLUS is updated to reflect higher observed growth and related projections, in Orford and other parts of southern Tasmania. Population growth, the success of the Tasmanian tourism industry and the advent of short-term rental accommodation are more prominent factors in driving demand than recognised in STRLUS.

APPENDIX

Determining the historical growth rates of dwellings in Orford was more complex than typically experienced in completing a housing demand assessment. Typical geographical areas of measurement such as an ABS SA2 or LGA are too large to be useful. The ABS geographies for Orford's State Suburb and Urban Centres and Localities (UC/L) have varied between the census years, as shown in the figure below, making a straight time-series comparison difficult.

FIGURE 5: ABS BOUNDARIES FOR ORFORD 2006, 2011 AND 2016



In addition to ABS data, SGS also typically relies on Nearmap to understand how dwellings have developed over time. Unfortunately, Nearmap data is not available for Orford post 2005.

Similarly, SGS also tends to rely on ABS's Estimated Resident Population dataset, but this data is only about an SA2 level, which to large a geography for Orford.

Given the uncertainty, SGS used the 2011 UCL boundary to calculate historical dwelling growth. So, for the 2016 data properties were removed at the mesh block level to ensure a reasonably consistent geographic size for a time series comparison.

Between 2006 and 2016 in the 2011 UC/L boundary (the green plus blue area) the number of dwellings grew from 625 to 795, at an average annua growth rate of 2.4 per cent. Between 2011 and 2016 the growth rate was lower at 1.6 per cent per annum.

In the demand model a two per cent dwelling growth rate was used, the value is between these historical rates, but the use of a 2 per cent growth rate value also considers other factors. Relying simply on historical trends doesn't take account of changing economic and societal patterns. These other factors include growing demand for holiday houses and short-term tourist rentals, changing preferences towards regional living and remote working (a trend sped up by the pandemic) and the aging population and their preferences to retire in beautiful coastal locations like Orford. Housing affordability issues in Hobart may also see more residents call nearby and more affordable towns like Orford home over the coming years.

Given all these factors SGS believes that a 2 per cent growth rate in dwelling demand is a robust assumption. In some ways it can even be considered as a conservative assumption given that using a lower growth rate could see the growth of the Orford township curtailed or property prices pushed up impacting affordability if sufficient land is not made available.



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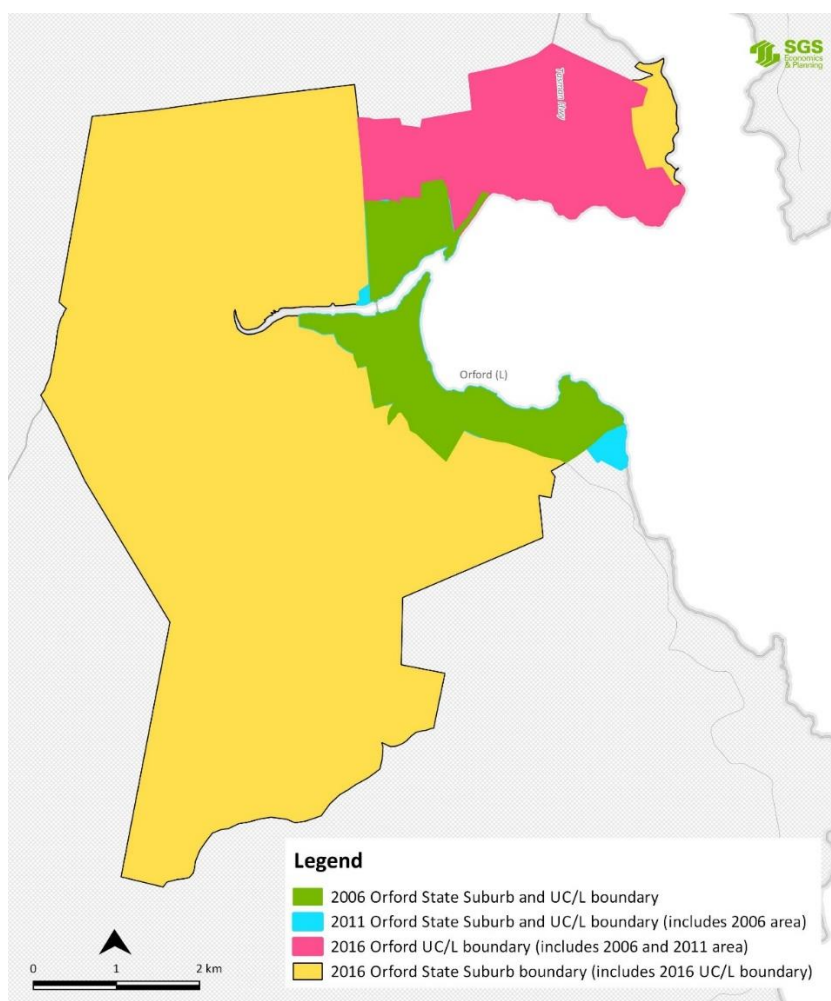
SGS response to comments on Orford Residential Land Supply and Demand Analysis Report

Comment 1

Page 10 refers to a dwelling growth from 738 to 851 from 2011 to 2016, noting that the TPC decision indicates there were 716 dwellings in Orford in 2011. This growth rate of 738 to 851 is used primarily to set the predicted dwelling growth rate of 2% to estimate the demand to 2035. Where does the increase of 113 dwellings come from?

Determining the historical growth rates of dwellings in Orford was more complex than typically experienced in completing a housing demand assessment. Typical geographical areas of measurement such as an ABS SA2 or LGA are too large to be useful. The ABS geographies for Orford's State Suburb and Urban Centres and Localities have varied between the census years, as shown in the figure below, making a straight time-series comparison difficult.

FIGURE 1: ABS BOUNDARIES FOR ORFORD 2006, 2011 AND 2016



Given the uncertainty, SGS used the 2011 UCL boundary to calculate historical dwelling growth. So, for the 2016 data properties were removed at the mesh block level to ensure a reasonably consistent geographic size for a time series comparison. In saying that, there was still some minor geographical differences between the boundaries used between 2011 and 2016 which were initially missed. Adjusting again for these differences the dwelling growth between 2011 and 2016 is 1.6 per cent per annum. Adjusting for these changes led to minor adjustments to the figures in the tables throughout the report – but without changing the overall conclusions.

A 2% forecast dwelling growth rate is still used because between 2006 and 2016, in the 2011 UC/L boundary (the green plus blue area) the number of dwellings grew from 625 to 795, at an average annual growth rate of 2.4 per cent. Thus still justifying the use of the 2 per cent forecast growth rate. The use of a 2 per cent growth rate value also considers other factors beyond simply relying on historical trends which don't take account of changing economic and societal patterns.

These other factors include growing demand for holiday houses and short-term tourist rentals, changing preferences towards regional living and remote working (a trend sped up by the pandemic and made evident through the rapidly increasing property prices in regional Tasmania in 2020) and the aging population and their preferences to retire in beautiful coastal locations like Orford. Housing affordability issues in Hobart may also see more residents call nearby and more affordable towns like Orford home over the coming years.

Given all these factors SGS believes that a 2 per cent growth rate in dwelling demand is a robust assumption.

Comment 2

Are there any dwelling build and population growth stats from 2016 to now that may assist with understanding the demand?

In addition to ABS data (which was last released for the 2016 Census), SGS typically relies on Nearmap to understand how dwellings have developed over time. Unfortunately, Nearmap data is not available for Orford post 2005. Similarly, SGS also uses ABS's Estimated Resident Population dataset, but this data is only about an SA2 level, which is too large a geography for Orford limiting its usefulness.

The lack of very recent data on dwelling growth specifically to Orford does mean that assumptions have had to be made to cover this gap. Data on dwelling completions is likely held by Council, but this data has not been supplied to or requested by SGS.

Comment 3

How does the ABS statistical area for Orford compare to the locality map for Orford on the LIST? It is assumed that the SA1 probably covers land within the Environmental Living Zone, Rural Living Zone and Rural Resources Zone.

The locality map for Orford on the LIST is considerably larger than the ABS boundary used in the analysis (2011 UC/L). The locality map from the LIST includes the Rural Resource Zone surrounding Orford, that is excluded in the ABS suburb and UC/L geographies.

Comment 4

The location of the documented supply of residential land is unclear and what the report considers to be the urban growth boundary of Orford. Where are the 227 lots that PDA reviewed and does this include the Solis development?

The lots reviewed by PDA are marked on the three maps on the following pages. The lots reviewed do not include the Solis development. PDA also reviewed lots in Spring Beach, but these were not included in the analysis as they were deemed by SGS to be outside the study area.

Comment 5

Page 15 refers to a 50% and 33% assumed realisation rate for land with development constraints. What is the basis behind these assumptions?

These are indicative shares as assumed by SGS and based on guidance provided PDA. PDA advised that lots that are easy to sub-divide and develop would have a realisation rate of 50% to 75%. Therefore, SGS assumed that lots with constraints would have lower realisation rates, indicatively assumed to be 33% to 50%.

Comment 6

Are the numbers in Table 7 correct? i.e. isn't the dwelling demand for Orford stated earlier in the report as 319 (table 2 on page 12 and also in table 9)?

This was a typo in the report (a missed copy and paste from the model). Adjusting for these changes led to minor adjustments to the figures in the tables throughout the report – but without changing the overall conclusions.

Comment 7

How do the bottom 2 rows in table 9 work in terms of calculating the supply gap?

As explained above, the typo in table 7 led to the numbers not adding up correctly in table 9. This has been fixed with no change to the overall conclusions.

FIGURE 2: PDA RESIDENTIAL LAND ASSESSMENT

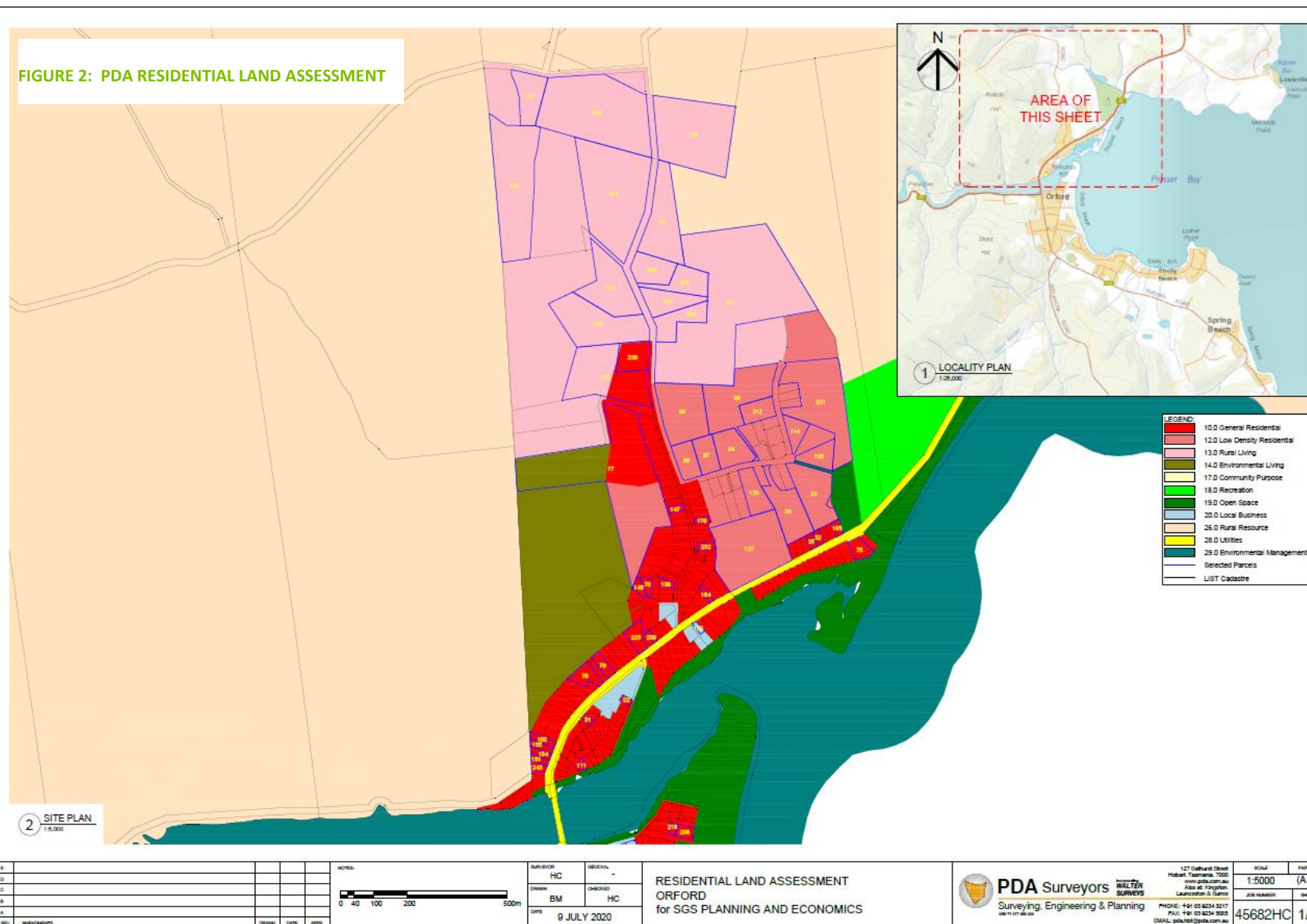
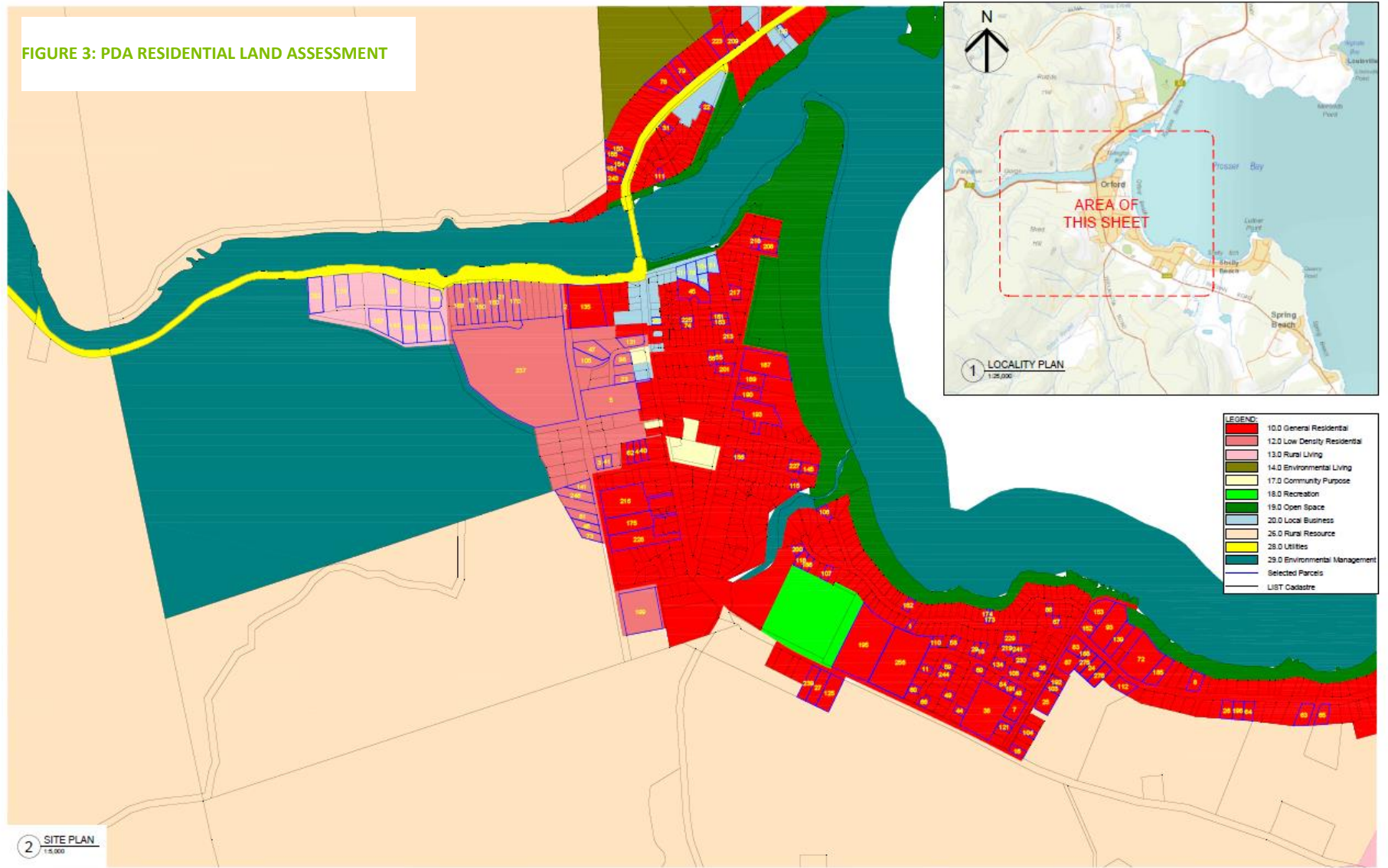


FIGURE 3: PDA RESIDENTIAL LAND ASSESSMENT



2 SITE PLAN
1:5,000

E				
D				
C				
B				
A				
REV	DESCRIPTION	DATE	DATE	APPROV



SURVEYOR	HC	CHECKED	-
DRAWN	BM	CHECKED	HC
DATE	9 JULY 2020		

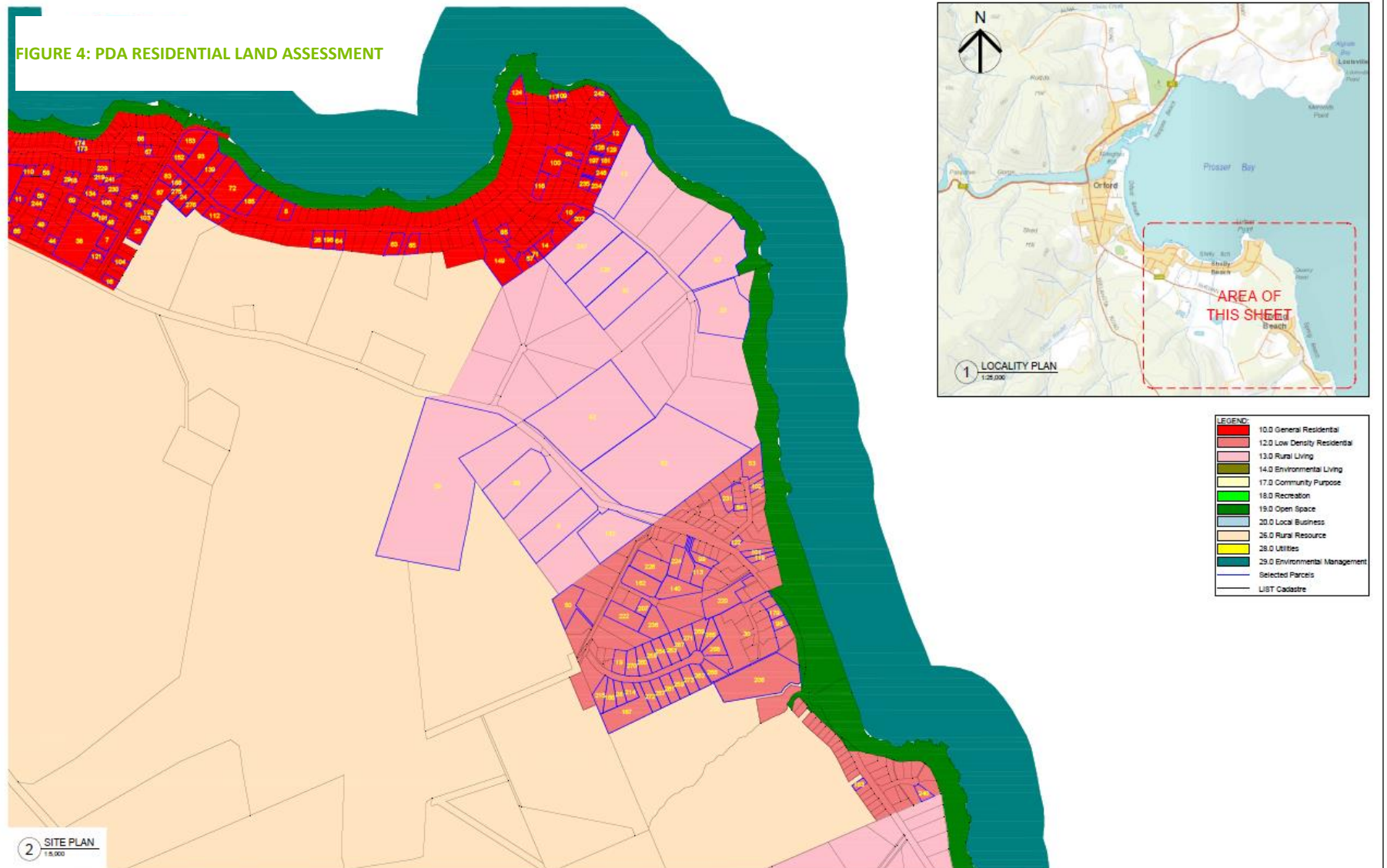
RESIDENTIAL LAND ASSESSMENT
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FIGURE 4: PDA RESIDENTIAL LAND ASSESSMENT



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