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Noosa Council Housing Needs Assessment

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**Endorsed by Noosa Council for the
purpose of informing the drafting of the
new planning scheme—20 April 2017**

Contents

Executive Summary	1
1. Introduction	7
1.1 Purpose of this Report	7
1.2 Context of the Report.....	7
1.3 Council's Sustainability Principles.....	8
1.4 Role of Local Government in Housing.....	9
1.5 Project Aims.....	9
1.6 Project Outcomes.....	10
2. Information Review and Analysis	11
2.1 Overview of the Noosa Shire Population	11
2.1.1 Socio-Economic Characteristics	11
2.1.2 Economic Characteristics.....	12
2.1.3 Housing and Household Characteristics.....	13
2.2 Demographic Characteristics of Localities	13
2.2.1 Overview.....	13
2.2.2 Characteristics by Locality.....	20
2.3 Policy and Strategy Framework.....	23
2.3.1 ShapingSEQ, Draft SEQ Regional Plan.....	23
2.3.2 State Planning Policy – State Interest Guideline, Housing Supply and Diversity, April, 2016.....	25
2.3.3 Queensland Housing Strategy, Discussion Paper (2016).....	26
2.3.4 Noosa Social Strategy 2015	27
2.3.5 Noosa Shire Council Local Economic Plan.....	28
2.3.6 Sunshine Coast Regional Council Housing Needs Assessment, Background Study, 2009	29
2.3.7 Residential Development Strategy for Noosa Shire, 2007	31
2.3.8 Sunshine Coast Affordable Living Strategy, 2010-2020.....	33
2.3.9 Implications for Housing Provision.....	34
3. Existing Housing Supply and Dwelling Characteristics	36
3.1 Private Housing Market Characteristics	36
3.1.1 Total Dwellings	36
3.1.2 Dwelling Type	36
3.1.3 Household Type by Dwelling Type.....	38
3.1.4 Household Size and Dwelling Size.....	39
3.1.5 Housing Tenure.....	41
3.1.6 Rental Stock - Bonds held by RTA 2011-2016	42
3.1.7 Median Rents by Housing Type	43
3.1.8 Rental Vacancy Rates	47
3.1.9 Dwellings Sales Data.....	47
3.1.10 Vacant Land Sales Data.....	50
3.1.11 Housing Characteristics by Localities.....	53
3.2 Social Housing Characteristics	57
3.2.1 Public Housing.....	57
3.2.2 Community Housing, Transitional Housing, and Emergency Housing.....	63
3.2.3 Private Market Assistance	66
3.3 Other Housing.....	67



4. Assessment of Housing Needs	69
4.1 Housing Needs for Specific Groups.....	69
4.1.1 Aged Persons' Accommodation.....	69
4.1.2 People with a Disability.....	81
4.1.3 Low Income Groups/Young People.....	91
4.1.4 Key Workers.....	98
4.1.5 People Escaping Domestic Violence	98
4.1.6 People at Risk of Homelessness.....	99
4.1.7 People with Mental Health Issues	100
4.1.8 Tourists/Visitors.....	101
4.2 Benchmarking Housing Suitability and Affordability.....	108
4.2.1 Housing Choice	110
4.2.2 Housing Stress.....	112
4.2.3 Housing Affordability.....	112
4.2.4 Implications for Housing Provision.....	114
5. Consultation	116
5.1 Consultation Undertaken.....	116
5.2 Summary of Findings of the Consultation	116
5.2.1 Housing for Specific Needs Groups.....	116
5.2.2 Visitor Accommodation.....	118
5.2.3 Student Accommodation.....	120
5.2.4 Real Estate Market	121
5.2.5 Property Development Market.....	123
5.2.6 Aged or Disability Accommodation	125
6. Population and Demographic Trends and Forecasts	126
6.1 Analysis of Development Trends	126
6.1.1 Development Activity – Dwellings.....	126
6.1.2 Development Activity – Lots.....	131
6.2 Analysis of Trends in Community Profile.....	133
6.3 Population, Household and Dwelling Projections.....	139
6.3.1 Population Projections	139
6.3.2 Household Projections	140
6.3.3 Dwelling Projections.....	140
6.3.4 Unitywater Demand Modeller and Tracking Tool (DMaTT) Dwelling Projections	141
6.3.5 Tourism Trends and Visitor Projections	146
6.4 Estimating Future Housing Needs.....	149
6.4.1 Methodology.....	149
6.4.2 Future Dwelling Diversity Needs for Residents	150
6.4.3 Future Dwelling Needs for Tourists/Visitors	161
6.5 Opportunities for Meeting Future Housing Needs	167
6.5.1 Meeting Resident Needs.....	167
6.5.2 Meeting Tourist/Visitor Needs.....	173
6.5.3 New Housing Models/Initiatives for Consideration.....	176
7. Recommended Actions for Council to Consider	178
7.1 Key Recommended Actions	178



7.1.1	Recommended Actions in Relation to Meeting Housing Needs	178
7.1.2	Recommended Actions in Relation to Providing Incentives.....	179
7.1.3	Recommended Actions in Relation to Housing for Recipients of the National Disability Insurance Scheme	180
7.2	Recommended Actions for the Planning Scheme	183
7.2.1	Recommended Actions in Relation to Small Dwellings.....	183
7.2.2	Recommended Actions in Relation to Dwelling Diversity.....	185
7.2.3	Recommended Actions in Relation to Residential Development in Business Centres	186
7.2.4	Recommended Actions in Relation to Secondary Dwellings.....	187
7.2.5	Recommended Actions in Relation to Housing Affordability.....	189
7.2.6	Recommended Actions in Relation to Short Term Rental Accommodation.....	193
7.2.7	Recommended Actions in Relation to Tourist Accommodation.....	196
7.2.8	Recommended Actions in Relation to Aged Accommodation	196
8.	References.....	199
	Appendices.....	203
	Appendix A. Comparative Analysis.....	203
	Appendix B. Projected dwelling need for residents according to no change, low change and high change scenarios – Additional tables.....	206
	Appendix C. New Housing Models/Initiatives for Consideration.....	213

List of Tables

Table 1.	Population growth, Noosa Shire, SEQ and Queensland, 2006-2015p.....	11
Table 2.	Estimated resident population by locality, 2011-2015	15
Table 3.	Dwellings, Noosa Shire, SEQ and Queensland, 2011.....	36
Table 4.	Dwellings by Dwelling Type, Noosa Shire, 2011	37
Table 5.	Dwelling Type, Occupied Residents, Noosa Shire, SEQ and Queensland, 2011	38
Table 6.	Household Type by Dwelling Type, Noosa Shire, 2011	39
Table 7.	Household Size by Dwelling Size, Noosa Shire, 2011	40
Table 8.	Dwelling tenure, Noosa Shire, SEQ and Queensland, 2011	42
Table 9.	Public Housing by Program, By Postcode and Suburb, Noosa Shire, 2015	58
Table 10.	Public Housing by Number of Bedrooms and Number of Occupants, Noosa Shire, 2015	58
Table 11.	Characteristics of Households in Public Housing, Noosa Shire, 2015.....	59
Table 12.	Homelessness Category for Households in Public Housing (at time of allocation), By Locality, Noosa Shire, 2015	60
Table 13.	Tenancy Start Date, Public Housing, Noosa Shire, 2015	60
Table 14.	Bedroom Entitlement for Households on Social Housing Register, By Preferred Location, Noosa Shire, 2015	61
Table 15.	Characteristics of Households on Social Housing Register, Noosa Shire, 2015.....	62
Table 16.	Homelessness Category for Households on Social Housing Register, By Location, Noosa Shire, 2015	63
Table 17.	Year of Application for Households on Social Housing Register, By Location, Noosa Shire, 2015	63
Table 18.	Housing and Service Providers, Noosa Shire, 2016.....	64



Table 19. Private market housing assistance by category of assistance, Noosa Shire, 12 months to 30 June 2016	67
Table 20. Caravan, Camping and Temporary Accommodation, Noosa Shire.....	68
Table 21. National benchmarks for aged care, 2016-2036	73
Table 22. Provision of Aged Care Services, Sunshine Coast Aged Care Planning Region, 2015-2016.....	74
Table 23. Benchmarking of Aged Care Services against Australian Government Targets, Sunshine Coast Aged Care Planning Region, 2015-16 - 2036.....	75
Table 24. Residential Aged Care Facilities, Noosa Shire, 2015-2016.....	76
Table 25: Benchmarking of Aged Care Services against Australian Government Targets, Noosa Shire, 2015-16 - 2036	77
Table 26: Benchmarking of Aged Care Services against Australian Government Targets, Noosa Shire, 2015-16 - 2036	78
Table 27. Retirement villages, independent living units, Noosa Shire, 2016.....	79
Table 28. Benchmarking of Independent Living Units against Notional Benchmarks, Noosa Shire, 2016 - 2036.....	80
Table 29. Accommodation for People with Disability, Noosa Shire	81
Table 30. Housing Stress, Households in Noosa Shire, Greater Brisbane and Queensland, 2011 .	92
Table 31. Rental Stress, Noosa Shire and Queensland, 2014 and 2015	93
Table 32. Homeless people, Noosa Shire, 2011.....	99
Table 33. People accessing specialist homelessness services, Noosa Shire and Queensland, Year to 30 June 2015	99
Table 34. Accommodation for People with Mental Health Issues close to Noosa Shire	101
Table 35. Accommodation establishments and rooms, ABS data, Noosa Shire, 2014-15.....	103
Table 36. Tourist accommodation (hotels, motels, and serviced apartments), Noosa Shire, 1 July 2014 – 30 June 2015	104
Table 37. Accommodation establishments, Members of Tourism Noosa, Noosa Shire, August 2016.....	105
Table 38. Property Listings on AirBnB and Stayz, Noosa Shire, 2016	107
Table 39. Dwelling Approvals (including Demolitions) by Dwelling Type, By Locality, Noosa Shire, 1 July 2011 to 30 June 2016.....	127
Table 40. Dwelling Approvals by Year, Noosa Shire, 2011-12 to 2015-16.....	128
Table 41. Approved Value per Dwelling by Locality, Noosa Shire, 1 July 2011 to 30 June 2016..	129
Table 42. Approved Floor Area per Dwelling by Locality, Noosa Shire, 1 July 2011 to 30 June 2016	130
Table 43. Age group projections (medium series) (2015 edition), Noosa Shire, 2011-2036.....	136
Table 44. Household type, Noosa Shire, 2001, 2006, 2011	138
Table 45. Population Projections, Noosa Shire, 2011-2036.....	140
Table 46. Household Type Projections, Medium Series, Noosa Shire, 2011-2036	140
Table 47. Dwelling Projections, Noosa Shire, 2011-2036.....	141
Table 48. Existing and Projected Resident Dwellings, DMaTT Model, Projection Areas and Noosa Shire, 2014-2036.....	143
Table 49. Existing and Projected Non-Resident/Visitor Dwellings, DMaTT Model, Projection Areas and Noosa Shire, 2014-2036	144
Table 50. Estimated and forecast total visitor nights, Brisbane and Gold Coast, and Rest of State, 2005-06 to 2024-25	147



Table 51. Forecast annual growth rates for total visitor nights, Brisbane and Gold Coast, and Rest of State, 2016-2025	148
Table 52. Projection strategy for each component of dwelling stock	149
Table 53. Assumed percentage point change (a) in dwelling preference away from large separate houses, Noosa Shire, 2011-2036	152
Table 54. Resulting proportion of households choosing large separate houses by household type, Noosa Shire, 2036.....	152
Table 55. Assumed change in dwelling preferences towards other dwelling types (a), Noosa Shire, 2011-2036	153
Table 56. Assumed change in dwelling preferences over time, Noosa Shire, 2016-2036	153
Table 57. Projected dwelling mix to meet assumed resident household needs, No, low and high change scenarios, Noosa Shire, 2011-2036.....	154
Table 58. Projected additional dwelling need to meet assumed resident household needs, No, low and high change scenario, Noosa Shire, 2016-2036.....	159
Table 59. Assumed need for tourist accommodation (rooms in resorts, motels, hotels, etc.), Noosa Shire, 2016-2036.....	163
Table 60. Assumed need for tourist accommodation (rooms in resorts, motels, hotels, etc.) (<u>with increased occupancy to 80%</u>), Noosa Shire, 2016-2036	163
Table 61. Assumptions about movement out of resorts.....	164
Table 62. Additional capacity in existing resorts, additional need in residential market, Noosa Shire, 2011-2036.....	164
Table 63. Assumed need for visitor dwellings, Noosa Shire, 2016-2036	165
Table 64. Assumed need for visitor dwellings (<u>with increased occupancy from 50% to 70%</u>), Noosa Shire, 2016-2036	166
Table 65. Assumed overall need for tourist accommodation and visitor dwellings, Noosa Shire, 2016-2036	167
Table 66. Assumed additional secondary dwellings, <u>High take-up scenario</u> , Noosa Shire, 2016-2036.....	168
Table 67. Assumed additional secondary dwellings, <u>Low take-up scenario</u> , Noosa Shire, 2016-2036.....	169
Table 68. Additional new dwelling stock required to meet assumed resident household needs, Noosa Shire, 2016-2036	170
Table 69. Comparison of modelled need to meet resident household growth and capacity for resident dwellings, Noosa Shire, 2016-2036	173
Table 70. Total estimated tourist accommodation and visitor dwelling needs (including new supply due to secondary dwellings and growth in renting out spare capacity), Noosa Shire, 2016-2036	175

List of Figures

Figure 1. Map of localities (and other statistical boundaries), Noosa Shire	14
Figure 2. Resident population by locality, 2011 and 2015	16
Figure 3. Median age by locality, 2011.....	16
Figure 4. Age structure by locality, 2011	17
Figure 5. Aboriginal and Torres Strait Islander people by locality, 2011	17
Figure 6. Household types by locality, 2011	18



Figure 7. Average household size by locality, 2016	18
Figure 8. Residents in need of assistance, 2011	19
Figure 9. Median household and personal income by locality, 2011.....	19
Figure 10. Dwelling Type, Noosa Shire, SEQ and Queensland, 2011	37
Figure 11. Household Size by Dwelling Size, Noosa Shire, 2011	41
Figure 12. Tenure Type, Noosa Shire, SEQ and Queensland, 2011.....	41
Figure 13. Total Bonds held by RTA, Noosa Localities, 2011-2016.....	43
Figure 14. Bonds Lodged with RTA by Dwelling Type, Noosa Shire, 2011-2016	43
Figure 15. Median Rents for Flats/Units (two bedrooms), Noosa Shire and Queensland, 2001- 2014.....	44
Figure 16. Median Rents for Houses (three bedrooms), Noosa Shire and Queensland, 2001-2014	45
Figure 17. Median Rents by Dwelling Type, Noosa Shire, 2014-2016.....	45
Figure 18. Median Rents by Locality, Two Bedroom Flat, Noosa Shire, 2011-2016.....	46
Figure 19. Median Rents by Locality, Three Bedroom House, Noosa Shire, 2011-2016	46
Figure 20. Median Rents by Locality, Four Bedroom House, Noosa Shire, 2011-2016.....	47
Figure 21. Rental vacancy rate by quarter, Noosa Shire, September 2010 - March 2016	47
Figure 22. Median Dwelling Sale Price, Noosa Shire and Queensland, 1998-2015.....	48
Figure 23. Median Dwelling Sale Price, Detached Dwellings (Houses), Noosa Shire and Comparisons, 1998-2015	49
Figure 24. Number of Sales, Detached Dwellings (Houses), Noosa Shire, 1998-2015.....	49
Figure 25. Median Dwelling Sale Price, Attached Dwellings, Noosa Shire and Comparisons, 1998- 2015.....	50
Figure 26. Number of Sales, Attached Dwellings, Noosa Shire, 1998-2015.....	50
Figure 27. Median Vacant Land Sale Price, Noosa Shire and Comparisons, 1998-2015.....	51
Figure 28. Median Vacant Land Sale Price per Square Metre, Noosa Shire and Comparisons, 1998-2015	52
Figure 29. Number of Sales of Vacant Land, Noosa Shire, 1998-2015.....	53
Figure 30. Dwelling type by locality, 2011	56
Figure 31. Dwelling type by locality (resident households), 2011	56
Figure 32. Dwelling tenure by locality, 2011	57
Figure 33. Definitions of Aged Care Terms.....	72
Figure 34. Median Mortgage Repayments and Rents, Noosa Shire, SEQ and Queensland, 2011 .	94
Figure 35. Median Household and Personal Income, Noosa Shire, SEQ and Queensland, 2011 ...	94
Figure 36. Accommodation Affordability Analysis, Noosa Shire, 2011-2016.....	96
Figure 37. Accommodation Affordability Analysis, Sunshine Coast LGA, 2011-2016	96
Figure 38. Accommodation Affordability Analysis, Brisbane City LGA, 2011-2016	97
Figure 39. Tourism statistics, Tourism Noosa, Noosa Shire, 2016	102
Figure 40. Separate houses, Comparison areas, 2011.....	109
Figure 41. Tenure type, Comparison areas, 2011.....	110
Figure 42. Small households in small/large dwellings, Comparison areas, 2011	111
Figure 43. Large households in large dwellings, Comparison areas, 2011	111
Figure 44. Rental and mortgage stress for low income households, Comparison areas, 2011	112



Figure 45. Proportion of income on housing costs, Comparison areas, 12 months to Jun 2016 (rent), Dec 2015 (purchase)	114
Figure 46. Dwelling Approvals by Dwelling Type, Noosa Shire, By Quarter, 2011-2016.....	128
Figure 47. Building Approvals, Value and Number, Noosa Shire, SEQ and Queensland, 2013-14	131
Figure 48. Number of Lot Registrations and Sales of Vacant Land, Noosa Shire, 1998-2015	132
Figure 49. Stock of Urban Residential Lot Approvals, Noosa Shire, 1998-2015	132
Figure 50. Estimated resident population, Noosa Shire, 1976-2011	133
Figure 51. Residents by Age Bracket, Noosa Shire, 1991-2036.....	135
Figure 52. Employment by Industry, Noosa Shire, 2006 and 2011	137
Figure 53. Existing Dwellings, DMaTT Model, Projection Areas, 2014.....	145
Figure 54. Existing Dwellings (Proportions), DMaTT Model, Projection Areas and Noosa Shire, 2014.....	145
Figure 55. Existing and Projected Resident Dwellings, DMaTT Model, Projection Areas, 2014-2036/Ultimate.....	146
Figure 56. Existing and Projected Non-Resident/Visitor Dwellings, DMaTT Model, Projection Areas and Noosa Shire, 2014-2036/Ultimate	146
Figure 57. Yearly change in total visitor nights, Queensland, 2005/06 to 2024/25.....	148
Figure 58. Projected change in dwelling type mix to meet assumed resident household needs, Noosa Shire, 2011-2036	156
Figure 59. Projected change in dwelling size mix to meet assumed resident household needs, Noosa Shire, 2011-2036	156
Figure 60. Projected dwelling mix to meet assumed resident household needs, No change scenario, Noosa Shire, 2011-2036.....	157
Figure 61. Projected dwelling mix to meet assumed resident household needs, Low change scenario, Noosa Shire, 2011-2036.....	157
Figure 62. Projected dwelling mix to meet assumed resident household needs, High change scenario, Noosa Shire, 2011-2036.....	158



LIST OF ACRONYMS

ACAR	Aged Care Approvals Round
ATSI	Aboriginal and/or Torres Strait Islander people
BCC	Brisbane City Council
DILGP	Department of Infrastructure, Local Government and Planning
DPWH	Department of Public Works and Housing
DMaTT	Demand Modeller and Tracking Tool
ERP	Estimated Resident Population
GFA	Gross Floor Area
GFC	Global Financial Crisis
HRIA	Holiday Rental Industry Association
LGA	Local Government Area
LGBTI+	Lesbian, Gay, Bisexual, Trans, Intersex and other gender and sexuality diverse groups
MCC	Melbourne City Council
NDIA	National Disability Insurance Agency
NDIS	National Disability Insurance Scheme
NDS	National Disability Services
NRAS	National Rental Affordability Scheme
NSC	Noosa Shire Council
QT	Queensland Treasury
QPP	Queensland Planning Provisions
REIQ	Real Estate Institute of Australia
RTA	Residential Tenancies Authority
SEIFA	Socio-Economic Indexes for Areas
SEQ	South East Queensland
SDA	Specialist Disability Accommodation



EXECUTIVE SUMMARY

Introduction

A Housing Needs Assessment was prepared to inform the preparation of a new Noosa Planning Scheme (the 'New Noosa Plan'), in accordance with the requirements of the *Queensland State Planning Policy – State Interest Guideline, Housing Supply and Diversity*, 2016.

The project aims as outlined by Council were to:

- Provide a clear understanding of Noosa Shire's current housing situation and trends and project housing needs into the future including those for specific groups (e.g. older people);
- Review competing interests between permanent residents and short term visitors for housing stock;
- Inform policy aimed at addressing housing needs shortages and improving housing choice within the Shire.

What are the key issues?

As a highly sought after and affluent coastal location, market conditions have favoured the development of often 'large' and at times extraordinary dwellings in many parts of Noosa Shire. As a consequence, Noosa Shire has seen various housing issues emerge which have been outside the ability of past planning schemes to resolve alone. Key issues include:

- Housing affordability, especially for low income households and key workers;
- A lack of accessible or adaptable housing for older people and people with special needs;
- A mismatch of housing size and household size (albeit some may be by choice or circumstance);
- A shortage of affordable and appropriate aged accommodation;
- A lack of housing diversity, and particularly smaller dwellings;
- Low levels of social and emergency housing;
- Conflict between resident and visitor accommodation.

This study informs the forthcoming planning scheme with the aim of addressing these issues to the extent possible through land use planning.

How does Noosa Shire compare?

Noosa Shire's housing appears not well suited to its demographic profile. Its housing profile is not dissimilar to Queensland, but its population is very different:

- Average household size in Noosa Shire is low and decreasing;
- The population is older than South East Queensland and the State, and is ageing rapidly;
- Median household income is lower than South East Queensland and the State.

Given this population profile, compared to other areas:



- There is a high proportion of detached houses, relative to other comparative tourism-oriented LGAs¹;
- Some 24% of all occupied dwellings in Noosa Shire are usually occupied by one person living alone, and 58.4% by a person living alone or a couple;
- The highest proportion of two person households live in 3-bedroom dwellings, with the second highest proportion in 4-bedroom dwellings;
- A significant proportion of small households are living in large dwellings. It is however noted that particularly in an affluent community, a proportion of households may choose to live in larger dwellings than seemingly required, or this may occur by circumstance;
- Housing stress is high in Noosa Shire relative to Brisbane or Queensland, but similar to comparative LGAs:
 - At 34.5%, the proportion of low income households that are renting and experiencing rental stress is higher than other comparative LGAs (except for Fraser Coast), and higher than Brisbane and Queensland;
 - 15.8% of low income households that are paying a mortgage were experiencing mortgage stress, similar to the other comparative LGAs, but significantly higher than Brisbane or Queensland;
 - Low income households experiencing either rental stress or mortgage stress made up around 16% of all households in other comparative LGAs in 2011, but this was a significantly higher proportion than for Brisbane with 11.3% or Queensland with 12%.
- Noosa Shire appears less affordable than all comparative LGAs, Brisbane City and Queensland:
 - Accommodation affordability is impacted by both low median incomes and high median accommodation costs;
 - Median rents for flats/ units in the Shire are fairly similar to the State but rents for houses are higher than the State;
 - There has been a declining trend in rental vacancy rates over the last five years from around 4-5% to around 1-2%;
 - The median dwelling sale price in Noosa Shire has remained higher than the State at all times between 1998 and 2015;
 - In 2011 median household income was almost \$200 below the SEQ Region and almost \$300 below the State per week.
 - Between 5-10 additional percentage points of income are needed in Noosa Shire to afford a dwelling compared to the next most unaffordable comparative LGA considered (which for most indicators was the Gold Coast).

¹ Fraser Coast, Douglas Shire and the Gold Coast



What are the needs of specific groups?

There are many groups in the community who have specific housing needs:

- **Older People:** There is currently a shortfall in Residential Aged Care provision. Even with the additional currently proposed facilities, further Residential Aged Care will be required in Noosa Shire in the future to meet the needs of the ageing population. There is currently a theoretical shortfall in the ratio of independent living units, and all currently approved/proposed Retirement Villages would need to proceed to meet demand in the future;
- **People with a Disability:** Supported accommodation for people with a disability is extremely limited in Noosa Shire. Noosa Shire currently has a relatively high proportion of people who need assistance and this will only increase over time as the population further ages. Both group housing and adaptable dwellings for people with a disability will be required;
- **Low Income Families and Young People:** The shortage of affordable housing choices particularly affects low income families and young people. There is a very limited supply of social housing (either community housing or public housing) available in Noosa Shire. The cost of land, in particular, has limited the ability to provide community housing, and the waiting list for public housing is long. New or infill more affordable housing is required. With the cost of land, this means making more efficient use of the limited remaining developable land through smaller lot sizes or particular density requirements for attached dwellings;
- **Key Workers:** Noosa Shire's economic structure is dependent on population driven industry sectors and tourism, which are among the poorest paid of any industries and have lower full-time employment rates. The lack of accommodation for key workers has long been an issue across the Sunshine Coast but key workers are crucial to the economy. Affordable key worker accommodation with good access to key tourist and hospitality areas, such as Hastings Street, is required;
- **People at Risk of Homelessness:** There is an urgent need for more emergency housing, including for people who are homeless or at risk of becoming homeless. There are nearly three times the proportion of households who are in the second highest category of risk of homelessness than for the State. There is consequently a strong need for more affordable housing to be built before homelessness increases;
- **People Escaping Domestic Violence:** Domestic violence is a major contributor to homelessness; however there are only 3 x two bedroom community built dwellings provided in Noosa Shire for people escaping domestic violence. More is urgently required;
- **Key Workers:** Noosa Shire's economic structure is dependent on population driven industry sectors and tourism, which are among the poorest paid of any industries and have lower full-time employment rates. The lack of accommodation for key workers has long been an issue across the Sunshine Coast but key workers are crucial to the economy. Affordable key worker accommodation with good access to key tourist and hospitality areas, such as Hastings Street, is required;



- **Tourists or visitors:** Tourism is one of the Shire's key economic sectors. From the perspectives of housing needs and the local economy, it is important that the accommodation demands of tourists or visitors are taken into account, and are planned for as far as possible given the land constraints in Noosa Shire, in alignment with future needs. In the event of continued ongoing current average growth rates in tourism visitation averaging 2.5% per annum over the last decade, significant need would be created for more tourist/visitor dwellings. However such growth is neither necessarily realistic nor sustainable.

What are Noosa Shire's future housing needs?

Resident Needs

The modelling suggests that to meet assumed future resident household needs to 2036:

- Only a small increase in detached houses may be required, other than by replacement of existing older dwellings;
- This small increase in detached housing should desirably be mostly by small, not large dwellings (this includes those in retirement villages and manufactured home parks, and innovative dwelling design and materials) and the remaining subdivision lot size should reflect the need for small dwellings;
- There is a further need for semi-detached dwellings, mainly small, but also three or more bedroom to provide additional housing choice; and
- There is a significant need for small attached dwellings (one to two bedroom) to offer additional housing options for a growing number of small households.

Tourist/Visitor Needs

In the event of continued ongoing demand in total visitor nights in line with that over the last decade, there would be significant additional demand for tourist/visitor dwellings to 2036. Demand will be offset in a number of ways:

- Development of the remaining identified 'tourist only' site (at Settler's Cove);
- Development of a proportion of new tourist accommodation (in line with Unitywater's Demand Modeller and Tracking Tool (DMaTT) projections) in existing visitor areas such as Noosaville, Noosa Heads, Sunshine Beach and Peregrian Beach;
- An increase in occupancy rates of existing tourist accommodation as accommodation becomes more in demand;
- The movement of a proportion of permanent residents out of resorts as revenue from holiday lettings improves (due to greater demand) and the supply of alternative small permanent accommodation increases (as above);
- The take-up of secondary dwelling provisions for visitor accommodation;
- A continuing increase in dwellings used for Short Term Rental Accommodation (such as AirBnB); and
- Increased usage of vacant dwellings.



However in the event of continued ongoing growth in total visitor nights in line with that over the last decade, there was found still likely to be a further projected need for additional tourist accommodation and visitor dwellings by 2036 which is unlikely to be able to be met by dedicated tourism development. Tourism demand may therefore 'spill over' into resident accommodation.

What are the Challenges and Opportunities?

Meeting the housing needs of residents in the light of competing demand for tourist accommodation

The overall conclusion of the assessment is that tourism demand, if it were to continue at its current level over the last decade, could have a substantial impact on the availability and affordability of resident housing. Considering tourism needs is a critical component of ensuring adequate and appropriate housing for residents – and vice versa. However it will be important that the limits of tourist accommodation sustainability in Noosa Shire are recognised, while encouraging the future growth of the tourism industry in more sustainable ways. This is in line with the policies of the Local Economic Plan, which looks beyond tourism-driven economic growth and employment, towards a more resilient and diversified economy. Achieving an appropriate balance of tourist and resident housing needs will be a challenge for the new Planning Scheme.

Making optimal use of remaining land through smaller lot sizes and minimum density requirements for attached dwellings in some locations

The availability of land within the Noosa Shire urban footprint/ town boundaries and its implications for the affordability of housing emphasises the importance of making the best use of remaining land to meet housing needs, particularly in terms of reducing the imbalance between small and large dwellings relative to the high number of small households in Noosa Shire, and also providing housing choice for the many different groups in the community. The New Noosa Plan will need to consider bold options for an increase in housing choice within the existing urban areas by providing smaller lots and minimum dwelling densities in appropriate locations.

Considering new built form controls and any appropriate incentives to achieve objectives, while preserving the integrity of the Noosa Plan

Built form controls can have unintentional consequences resulting in housing outcomes that may not be those most required to meet needs. This occurred in the past in relation to favouring large duplexes over smaller dwelling types. These controls need to be reviewed to ensure they are not unduly restricting housing choice.

Incentives can be an important tool for Councils to attempt to achieve their housing priorities. However those relating to density can be seen as eroding amenity or the principles of the Noosa Plan; and those that relate to reductions in infrastructure charges can result in a shortfall in planned infrastructure revenue. Reduction in development application fees can similarly affect Council's budgeting while contributing little significant incentive; and it is noted that development assessment times are already being further reduced under the new Planning Act so that reduction in assessment times for priority applications would be difficult.



Further consideration of built form controls and investigation of possible appropriate incentives, including parking requirements, density and infrastructure charges, is required. The challenge will be ensuring the success of any 'carrots or sticks' adopted in terms of meeting Council's objectives for the provision of priority housing, while preserving the integrity of the Noosa Plan.

Exploring new and innovative solutions, some of which may be challenging to accept

There will be a need to think outside the square in the future if housing needs are to be met. Some of these initiatives may be challenging in terms of accepting new or innovative housing models or styles. A further challenge will be flexibility in planning provisions to facilitate such applications as far as possible. It may be necessary to allow some licence for innovation provided it meets key principles of design, function and the inherent benefits of the model.

Considering other ways to pursue housing objectives

It must be recognised that not all housing priorities can be addressed through land use planning. A particular issue is the difficulty of providing social housing in Noosa Shire due largely to the cost of land. Council may choose to investigate other ways to assist the community housing sector to meet social and housing affordability needs. It is understood that other ways of promoting the supply of affordable housing will be investigated as part of the implementation of the *Social Strategy 2015*. Council should continue to advocate, however, for the provision of additional crisis and emergency housing in the Shire.



1. INTRODUCTION

1.1 Purpose of this Report

The purpose of this project is to advance the development of a Housing Needs Assessment for Noosa Shire, in accordance with the requirements of the Queensland *State Planning Policy – State Interest Guideline, Housing Supply and Diversity* (April, 2016) (“the guideline”).

While housing provision is not the responsibility of Local Government, the Queensland Government has an expectation that Local Government planning schemes will support an adequate supply and diversity of housing through the identification of suitable land for housing development and inclusion of planning provisions that support the supply of a diverse range of housing that is high-quality, well-serviced and appropriately located.

As noted in the guidelines, a Housing Needs Assessment can provide Local Government with the detailed information required to support proposed planning scheme measures on planning and regulating housing and land development over the life of the planning scheme to achieve desired housing outcomes. Accordingly, a key purpose of this project is to inform the development of a new planning scheme for Noosa Shire.

1.2 Context of the Report

Noosa Shire is a very desirable place to live with a low level of population growth, and as such, housing availability is limited and some members of the community struggle to find housing suitable to their needs and circumstances.

Housing stock is noticeably dominated by detached houses and semi-attached or attached housing of at least three bedrooms which appears somewhat incongruous given a majority of households are made up of just one or two people. However the free market system has meant that historically, subdivided lots and dwellings have been built to meet a market that the developer believes will offer the most dollar return. Dwellings are also built with resale in mind and four bedrooms and two garages has been the preferred norm for houses. While in earlier years two-bedroom units were quite common, three bedrooms have undoubtedly become the standard.

Noosa Shire has a desirable environmental setting and the built form and business offerings have been of a high standard compared to many other coastal settlements. It should come as no surprise then that land and property commands a higher price than many other places and thereby attracts many well-resourced residents. Investors who purchase dwellings also impact on purchase price through added competition with potential resident-owners. The investor then seeks the highest and best rental return whether by resident or visitor.

It is important to view these factors within the historic development and planning of Noosa Shire. This was based on a population concept which identified a development carrying capacity and a clear plan for future growth was adopted in accordance with that. It has not been the case of development at all costs. However maintaining good planning standards with a defined population/development capacity was always ultimately going to lead to higher priced real estate.

Quality of development was preferred to quantity and at times it was a case of ‘less is more’. Market conditions have favoured the affluent in coastal and prime locations at Noosa Heads and Noosaville. The consequence has been ‘large’ and at times extraordinary dwellings. Development was expected to comply. Bonus provisions or incentives have never featured.



Development that fitted with the planning scheme was approved promptly. It has often been the case that applications have sought to exceed entitlements or to ignore entirely the planning scheme intentions. These types of applications have not been dealt with expeditiously. Council has not been able to prohibit development which was consistent with the planning scheme.

Lifestyle of residents has been placed ahead of the needs of tourists, based on the principle that if things were done well for the residents the visitors will come.

Council genuinely saw Noosa Shire as a community of communities – the hinterland is different to Tewantin which is different to the coastal parts, plus Noosa North Shore and Boreen Point, etc. This led to different planning and different outcomes expected.

Over the years Council has assumed an increasing social role. A relationship with the Kabi Kabi people evolved, libraries were better resourced, community staff were appointed and the Shire moved forward. The SHINE houses were built on land donated by Council (see Section 3.2.2). Sector boards were established as an integral part of guiding Council direction, and community engagement grew substantially.

Intervention in the housing market will require consideration of the desirability of increased focus on outcomes of social equity and inclusiveness, including stimulating housing diversity. Various options are available for Council consideration in this regard, and they are discussed within this report.

1.3 Council's Sustainability Principles

Noosa Shire has a long history of protecting the natural environment, enhancing biodiversity and doing things in a balanced and sustainable way, not just for the current community and economy, but for future generations.

To further these efforts, on the 19 November 2015, Council adopted a set of Sustainability Principles² for the purpose of providing a common basis for increasing sustainability in Noosa Shire.

The principles have been identified to guide the development of Council's strategy documents and to prompt consideration of sustainability across all areas of Council business so that the environment, economic and social elements of sustainability are considered inter-dependently.

Noosa Shire's Six Sustainability Principles are:

- Resources are sustainably managed so that the lifestyle of the community is preserved, without compromising the ability of future generations to meet their own needs (consistent with the Brundtland Commission definition of sustainability).
- Noosa's economy is prosperous, diverse and protective of its unique environment.
- Noosa residents belong to a community that values its diversity, accessibility and affordability.
- Noosa's community is inclusive, connected and resilient and encourages participation and information sharing.
- Noosa's community benefits from quality places and programs that enhance wellbeing and support creative, active and healthy lifestyles.

² <http://www.noosa.qld.gov.au/sustainability-principles>



- Good governance is achieved through effective and efficient decision making, made in the interests of the community.

Regard has been given to these principles in preparing this report.

1.4 Role of Local Government in Housing

It is increasingly recognised that a diversity of stakeholders have a role to play in addressing the housing needs of Australian communities. All levels of government contribute to shaping local housing markets and have a role to play in promoting better housing outcomes. This can occur through influencing markets, developing policy and legislation, regulating the supply of and developing land as well as delivering programs and funding arrangements.

Australian, State and Local Governments share the responsibilities for regulating the housing market through building and planning regulations. The Australian and State Governments provide the policy and legislative framework within which local government operates, and also influence the economic context in which housing is supplied (e.g. through tax regimes, interest rates and funding).

The private sector, and to a lesser extent the community and public sectors (primarily the State Government) are responsible for the supply of housing. Importantly, the State Government is responsible for social housing, including the provision of public housing and, in partnership with nongovernment organisations, community housing for eligible low-income households and those with special needs. Australian and State Governments have also traditionally been responsible for providing housing assistance to people on very low incomes. Increasingly however, resource limitations have meant that many of these households have had to rely on the private housing market.

Whilst the primary responsibility for housing policy and housing funding lies with the Australian and State/Territory Governments, Local Governments may play a role in facilitating housing delivery and promoting the provision/retention of affordable housing. Local Government's role includes strategic planning, the regulation of housing supply and form, infrastructure planning and pricing policies, rate setting and community service delivery. The exercise of these functions can create opportunities for additional housing, guide the form of housing in response to needs, and influence the cost of production and the availability of services.

Local Government planning schemes are one tool through which these responsibilities can be exercised; however there are limitations to the role of land use planning to deliver housing outcomes, and it is up to each Council to determine how it wishes to pursue housing objectives and strategies. While Local Government is not equipped to take over the roles traditionally played by State/Territory and Australian Governments, there is nevertheless some scope for Councils to direct the activities that are within their domain to promote better housing outcomes for their communities should they so desire.

1.5 Project Aims

The project aims as outlined by Council were to:

- a. Provide a clear understanding of Noosa Shire's current housing situation and trends including dwelling type, dwelling tenure, dwelling supply and dwelling affordability having consideration of demographic forecasts provided, project housing needs into the future including for instance, projected need for small dwellings, aged persons housing, affordable housing, housing for people with a disability or with other special circumstances;



- b. Review competing interests between permanent residents and short term visitors for housing stock;
- c. Inform policy aimed at addressing housing needs shortages and improving housing choice within the Shire.

1.6 Project Outcomes

The outcomes required to be delivered by this project included to:

- a. Provide an understanding of housing choice, housing stress and housing affordability as they relate to Noosa Shire;
- b. Provide an understanding of housing needs for specific groups such as those on low income, those who are aged, those with a disability or mental illness and those escaping dangerous situations;
- c. Provide recommendations on how local housing, especially a proportion of new housing, can be made suitable for recipients of the National Disability Insurance Scheme (NDIS);
- d. Review the housing trends in Noosa Shire, compared to other areas;
- e. Compare existing and trending housing stock to future population including any forecast housing mismatch;
- f. Discuss what incentives may advance housing choice without detracting from the liveability of our neighbourhoods;
- g. Provide policy recommendations.

The Housing Needs Assessment has collated and analysed information from a range of sources including statistical data on demographics, population growth, and development activity, as well as reviewing the existing policy and strategy context of Noosa Shire, and undertaking consultation with key stakeholder groups that have contact with households with particular housing issues or needs.

This report consolidates and synthesises this information and provides policy recommendations to help inform the direction of housing outcomes in Noosa Shire.



2. INFORMATION REVIEW AND ANALYSIS

2.1 Overview of the Noosa Shire Population

Noosa Shire Council's Community Profile (AEC Group 2015) notes that Noosa Shire is very similar to South East Queensland (SEQ) and Queensland across many socio-economic indicators; however, it differs significantly in two areas. Firstly, Noosa Shire's population is older and aging faster than the rest of the region. Secondly, Noosa Shire has a greater reliance on tourism for its economy than SEQ or Queensland. These two factors shape Noosa Shire's social and economic structure and will continue to shape its social and economic future.

2.1.1 Socio-Economic Characteristics

The Community Profile outlined the following socio-economic characteristics of the Noosa Shire population:

- **Noosa Shire's population is relatively small compared to SEQ and Queensland** (making up only 1.6% and 1.1% of total populations, respectively), however, with an estimated resident population of some 53,770 people (estimate at 30 June 2015) (Queensland Government 2016a), Noosa has sufficient critical mass to support a range of residential and business services locally.
- **Since 2001, Noosa Shire's population has grown at a slower rate than SEQ and Queensland (Table 1).** While slower, this level of growth is still sufficient to provide an ongoing stimulus for economic growth.

Table 1. Population growth, Noosa Shire, SEQ and Queensland, 2006-2015p

Area	2006	2011f	2015p
	Population (Average annual growth rate for preceding period)		
Noosa Shire (Qld Government 2016a) (ABS Consultancy)	NA	51,267 (NA)	53,769 (1.2%)
Noosa Shire (Qld Government 2016b)	48,082 (2.0%)	51,038 (1.2%)	53,515 (1.2%)
South East Queensland (including all of Toowoomba Regional Council area)	3,746,120 (2.4%)	4,187,690 (2.3%)	4,471,303 (1.7%)
Queensland	4,007,992 (2.3%)	4,476,778 (2.2%)	4,778,854 (1.6%)

Source: Queensland Government 2016a (ABS Consultancy); Queensland Government 2016b;

Notes: f = final estimate, r = revised, p = preliminary.

The discrepancy between the ABS and the Queensland Government population estimates relates to one split SA1 area (3143356) in building up localities (ABS estimate includes the whole SA1).

- **Noosa Shire's population is older than SEQ and Queensland.** The median age of Noosa's residents was 45.9 years in 2011. This is 7.8 years higher than the median age of SEQ residents (38.1 years) and 9.9 years higher than the median age of residents of the State (36.0 years).
- **Noosa Shire's population is aging quickly.** Since 1991, Noosa Shire has seen a significant increase in the proportion of residents aged 45 years and over. Residents aged 45 years and over accounted for 39.3% of the population in 1991, 45.3% in 2001 and 50.9% in 2011. Residents aged 65 years and over have grown from 16.5% of the



population in 1991 to 19.3% in 2011. Looking forward to 2036, a projected 57.2% of all residents in the Shire will be aged 45 years and older, with almost a third of all residents forecast to be aged 65 years and over. At the same time, the proportions of children, teenagers and young adults were all lower than for Queensland, with 27.4% of the Noosa Shire population being under 25 years of age, compared to 33.8% for Queensland. To 2036, the proportion of young people under 25 years of age in Noosa Shire is projected to fall to 24.8%.

- **Noosa Shire's population is relatively ethnically uniform**, with high levels of Australian born, English only speaking households. 77% of Noosa Shire's population was born in Australia, compared to 75% and 78% (SEQ and Queensland, respectively). 95% of households in Noosa Shire speak only English, compared to 88% and 90% (SEQ and Queensland, respectively).
- **Noosa Shire has lower household incomes than SEQ and Queensland**. In 2011, the Shire reported a median household income almost \$200 below the SEQ Region and almost \$300 below the State (\$953.5, \$1,150.7 and \$1,235.0 per week respectively). Between 2006 and 2011, Noosa Shire's household income grew at an average annual rate of 2.8%, which is below the rate of annual inflation (3.2%) during this time. Conversely, Noosa Shire's individual income levels grew by an average annual rate of 3.8% during this time.
- **In terms of socio-economic advantage and disadvantage, Noosa Shire is overall average despite pockets of both**. The Socio-Economic Indexes for Areas (SEIFA) is a product developed by the ABS that ranks areas in Australia according to relative socio-economic advantage and disadvantage by using various Census-based statistics (i.e. income, skills, unemployment, educational attainment, etc.). Noosa Shire's SEIFA score is 1,000.9 (compared to the Australian average of 1,000). SEQ scored 1,015.2. Despite this, some locational variance exists with pockets of disadvantage being reported in some areas.

2.1.2 Economic Characteristics

Economic characteristics include the following:

- **Noosa Shire's economic structure is dependent on population driven industry sectors and tourism**. The top five employment sectors in Noosa Shire (which provide over half of all jobs) are:
 - Retail trade (13.6% of total) – 26% higher than the Australian average;
 - Accommodation and food services (12.8% of total) – almost double the Australian average;
 - Health care and social assistance (12.8% of total);
 - Construction (10.8% of total);
 - Education and training (7.6% of total).
- **The high prevalence of retail trade and accommodation and food services in Noosa Shire demonstrates the strong local tourism sector**. In the year ending June 2015, tourism contributed an estimated \$700 million into the local economy.
- **Tourism is identified as a key strength for the region's economy and an opportunity for the future, as well as a weakness in that there is a reliance on tourism in the local economy**. The Local Economic Plan (Noosa Council, 2015a) looks beyond tourism-driven economic growth and employment, towards a more resilient and diversified economy, by achieving growth in 'smart' industry sectors that have high economic value and low



environmental impact, while recognising and supporting sustainable tourism as an ongoing key economic driver.

2.1.3 Housing and Household Characteristics

Housing and household characteristics can be summarised as follows:

- **Noosa Shire's household type is relatively consistent with SEQ and Queensland.** Roughly 70% of households are one family households across Noosa Shire, SEQ and Queensland. Noosa Shire reported a slightly higher proportion of lone person households (24.4%) than the SEQ Region (22.4%) and the State (22.8%).
- **Noosa Shire's household size is relatively low compared with SEQ and Queensland.** In 2011, Noosa reported a lower average number of persons per household (2.4) than the SEQ Region (2.6) and the State (2.6).
- **Noosa Shire loses a significant number of young adults** who are likely leave to pursue university study or employment opportunities outside of the Shire. Noosa Shire reported lower levels of residents aged 20-34 than SEQ and Queensland. Noosa Shire reported considerably less residents studying at a university or other tertiary institution in 2011 (only 11.5%) compared to SEQ (20.4%) and the State 17.9%. The Tewantin TAFE campus has closed since the 2011 Census.

2.2 Demographic Characteristics of Localities

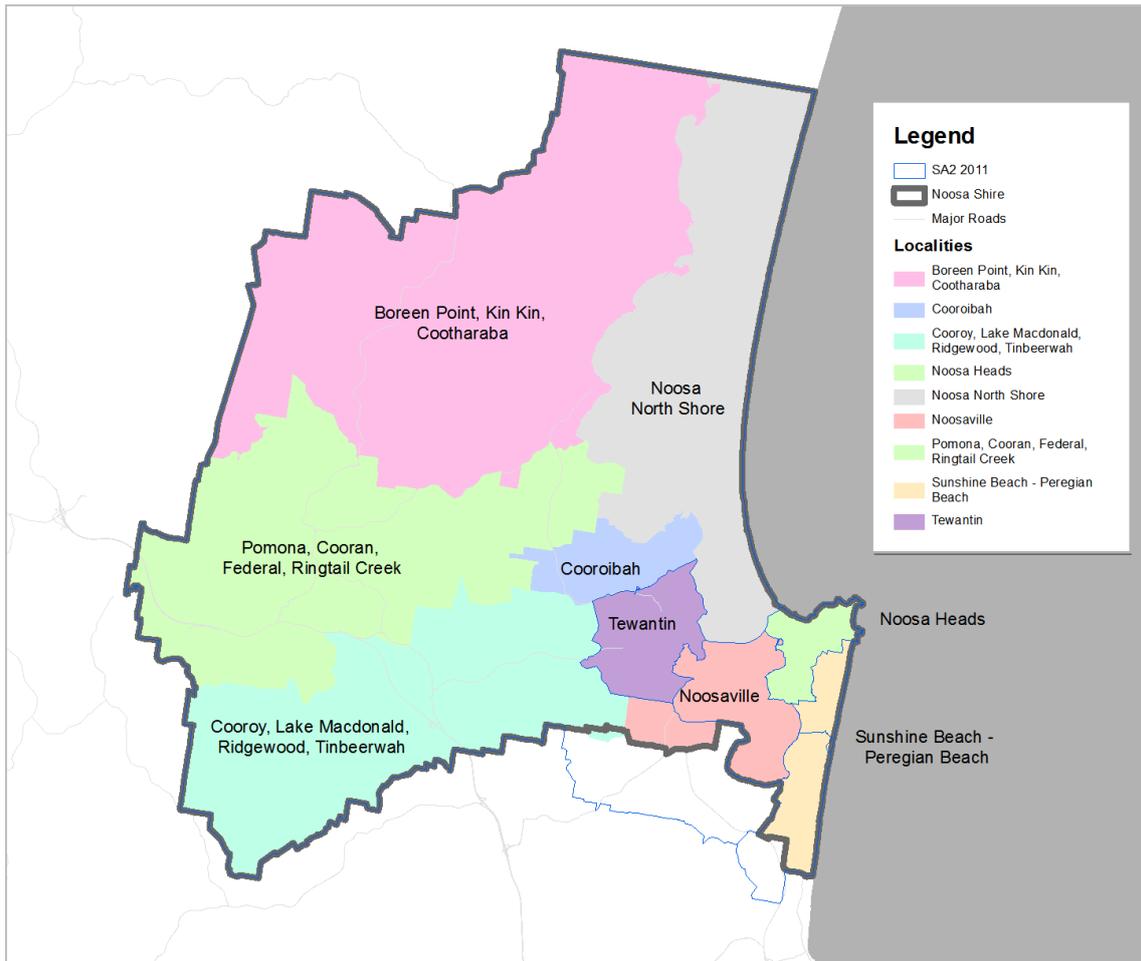
2.2.1 Overview

Nine localities were identified in Noosa Shire Council's Community Profile (AEC Group 2015):

- Cooroibah;
- Tewantin;
- Sunshine Beach to Peregian Beach;
- Federal to Ringtail Creek, including Pomona and Cooran;
- Noosaville and Doonan;
- Noosa North Shore;
- Noosa Heads;
- Ridgewood to Tinbeerwah, including Cooroy and Lake Macdonald;
- Boreen Point, Kin Kin and Cootharaba.



Figure 1. Map of localities (and other statistical boundaries), Noosa Shire



The majority of the data in this section has been derived from Noosa Shire Council's Community Profile (AEC Group 2015), however some of the data has been updated with more recent data from other sources as noted.

According to ABS estimates, the Sunshine Beach to Peregian Beach locality was the largest locality in terms of estimated resident population in 2015 with a population of 11,431 people, followed by Tewanin at 10,457 people and Noosaville and Doonan at 9,466 people (**Table 2** and **Figure 2**). The Noosa North Shore locality had the smallest estimated resident population with just 350 people in 2015. The figures for 2012-2015 are revised and preliminary estimates and may be revised further when the 2016 census population data are released.



Table 2. Estimated resident population by locality, 2011-2015

Localities	2011f	2012r	2013r	2014r	2015p	Growth Rate (2011-2015)
Cooroibah	1,815	1,856	1,864	1,922	1,956	1.9%
Tewantin	10,358	10,375	10,386	10,498	10,457	0.2%
Sunshine Beach to Peregian Beach	10,626	10,820	10,984	11,209	11,431	1.8%
Federal to Ringtail Creek, including Pomona, Cooran	6,051	6,100	6,219	6,265	6,257	0.8%
Noosaville and Doonan	8,714	8,957	9,127	9,268	9,466	2.1%
Noosa North Shore	342	344	344	344	350	0.6%
Noosa Heads	4,221	4,258	4,312	4,333	4,421	1.2%
Ridgewood to Tinbeerwah, including Cooroy, Lake Macdonald*	7,307	7,354	7,457	7,535	7,551	0.8%
Boreen Point, Kin Kin, Cootharaba	1,833	1,841	1,858	1,902	1,880	0.6%
Total Noosa Shire (Qld Government 2016a) (ABS Consultancy)*	51,267	51,905	52,551	53,276	53,769	1.2%
Total Noosa Shire (Qld Government 2016b)*	51,038	51,671	52,310	53,033	53,515	1.2%

Source: Queensland Government 2016a (ABS Consultancy); Queensland Government 2016b;

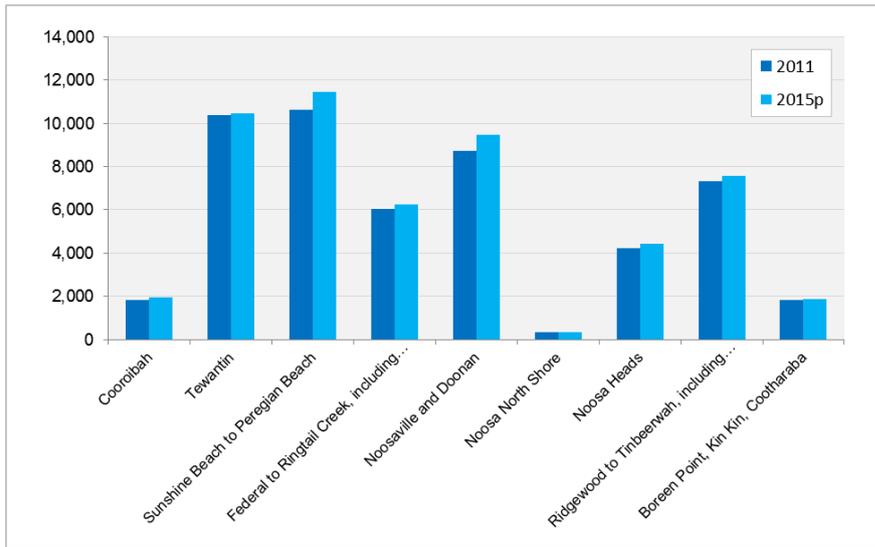
Notes: f = final estimate, r = revised, p = preliminary.

*The discrepancy between the ABS and the Queensland Government population estimates relates to one split SA1 area (3143356) in building up localities (ABS estimate includes the whole SA1).

Fastest growing localities were Noosaville and Doonan, Cooroibah, and Sunshine Beach to Peregian Beach. Tewantin was particularly slow growing, as was Boreen Point/ Kin Kin/ Cootharaba and Noosa North Shore.



Figure 2. Resident population by locality, 2011 and 2015

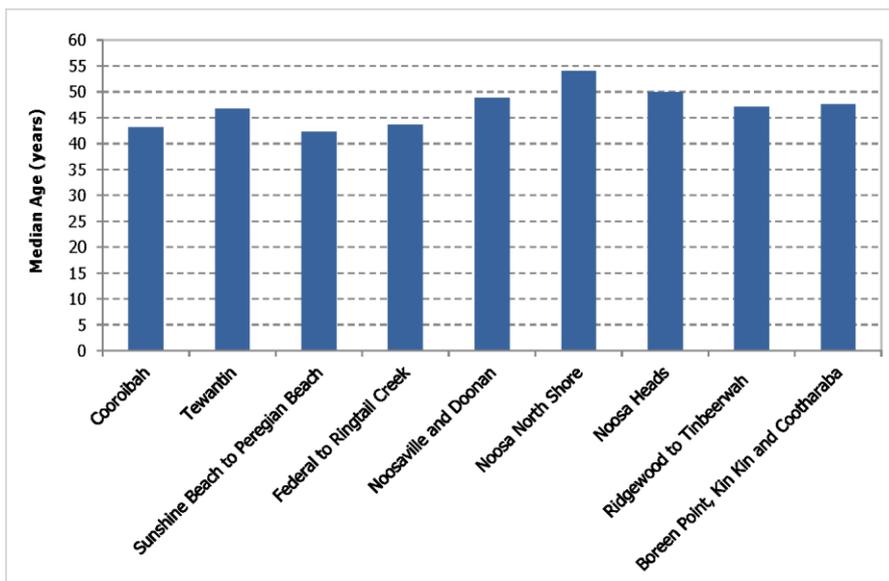


Source: Queensland Government 2016a (ABS Consultancy);

Noosa North Shore had the highest median age of any of the localities at 54.0 years, followed by Noosa Heads at 50.0 years and Noosaville and Doonan at 48.9 years (**Figure 3**). These were all higher than the median age for the Noosa Shire at 45.9 years.

The lowest median ages were reported in Sunshine Beach to Peregian Beach (42.3 years), Cooroibah (43.2 years) and Federal to Ringtail Creek (43.6 years).

Figure 3. Median age by locality, 2011

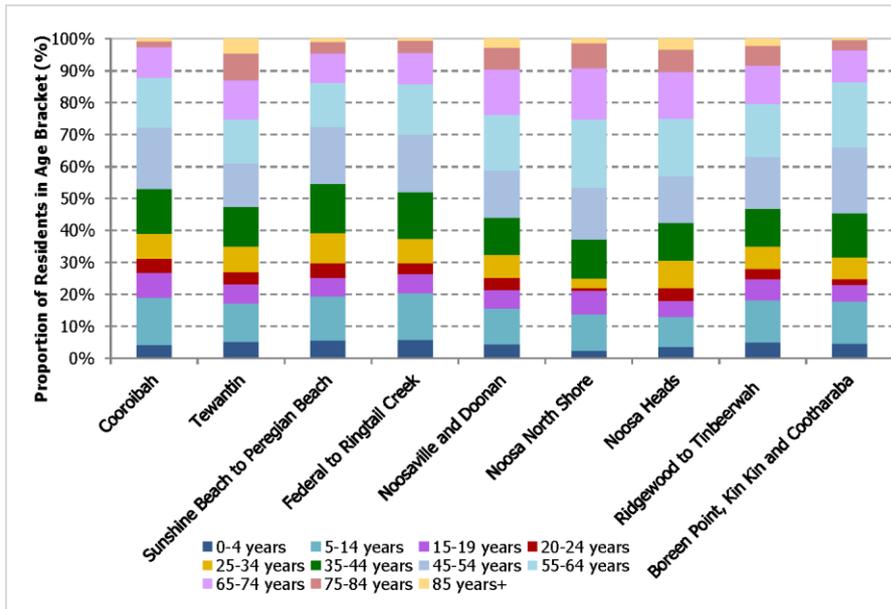


Source: AEC Group 2015;

The age groups of 45-54 year olds and 55-64 year olds are very well represented in each locality (**Figure 4**). Cooroibah, Federal to Ringtail Creek and Sunshine Beach to Peregian Beach have relatively higher proportions of residents aged between 5 and 14 years.



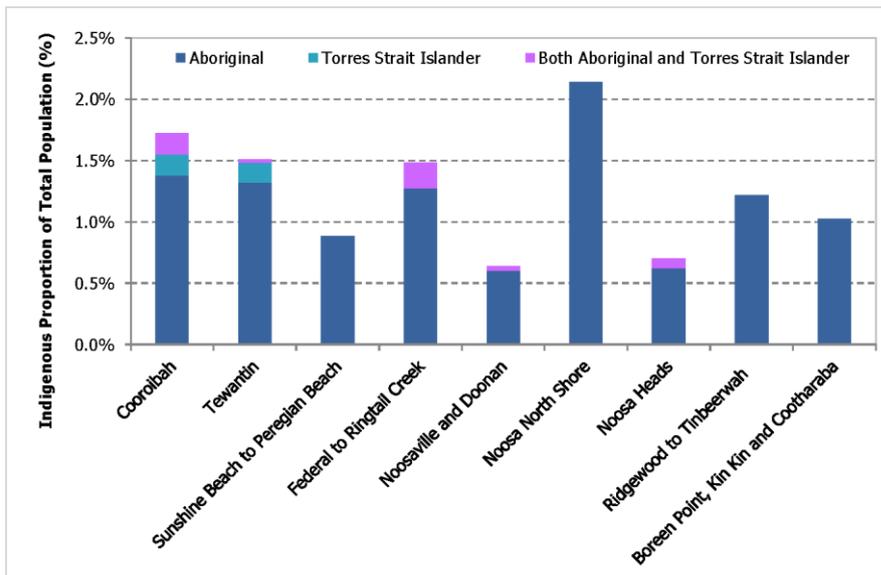
Figure 4. Age structure by locality, 2011



Source: AEC Group 2015;

The proportion of Aboriginal and Torres Strait Islander people was very low in all localities (under 2.5% of the population) (**Figure 5**). Just over 2.0% (or seven residents) of the Noosa North Shore’s population identified as being an Aboriginal and Torres Strait Islander person, 1.7% (or 24 residents) in Cooroibah, 1.5% (or 141 residents) in Tewanтин and 1.5% (or 74 residents) in Federal to Ringtail Creek.

Figure 5. Aboriginal and Torres Strait Islander people by locality, 2011



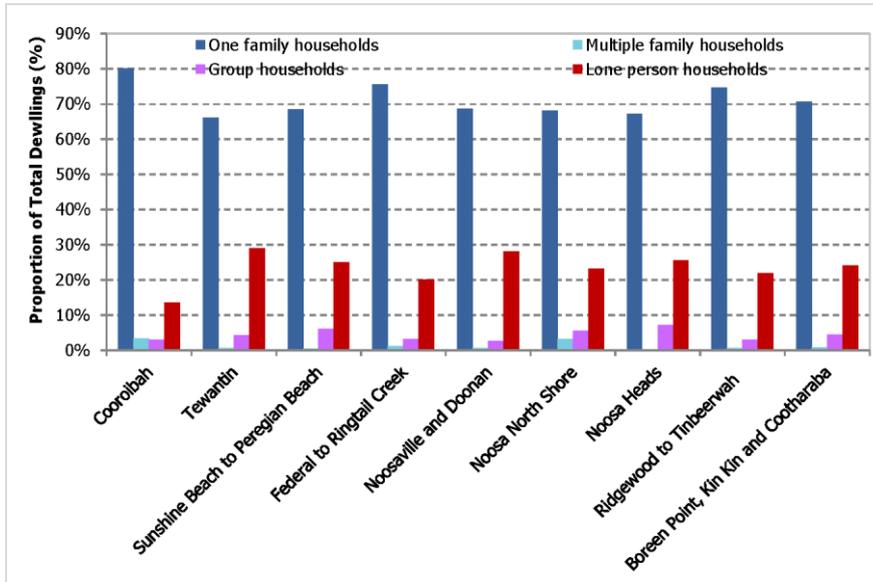
Source: AEC Group 2015;

Localities with high proportions of lone person households were Tewanтин (29.0%), Noosaville and Doonan (28.1%) and Noosa Heads (25.6%) (**Figure 6**). Cooroibah had the highest proportion of single and multiple family households than any other locality, with 84.1% of households being families (including 32.9% couples, 39.1% couples with children, and 11.0% one parent families),



well above the Federal to Ringtail Creek locality at 76.7% and the Ridgewood to Tinbeerwah locality at 75.1%.

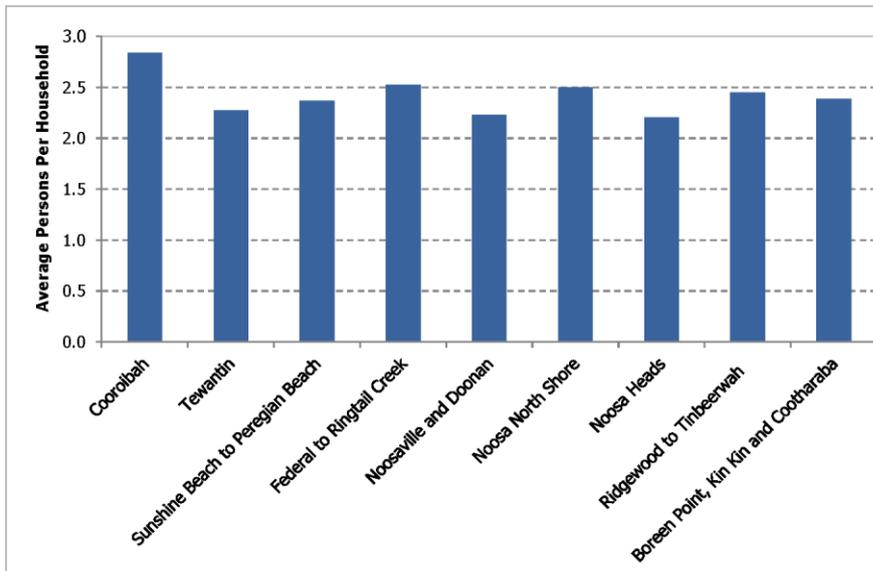
Figure 6. Household types by locality, 2011



Source: AEC Group 2015;

The average household size in Coorobah was 2.8 people which was much higher than in other localities. Noosa Heads and Noosaville had the lowest average household size of any of the localities at 2.2 people.

Figure 7. Average household size by locality, 2016

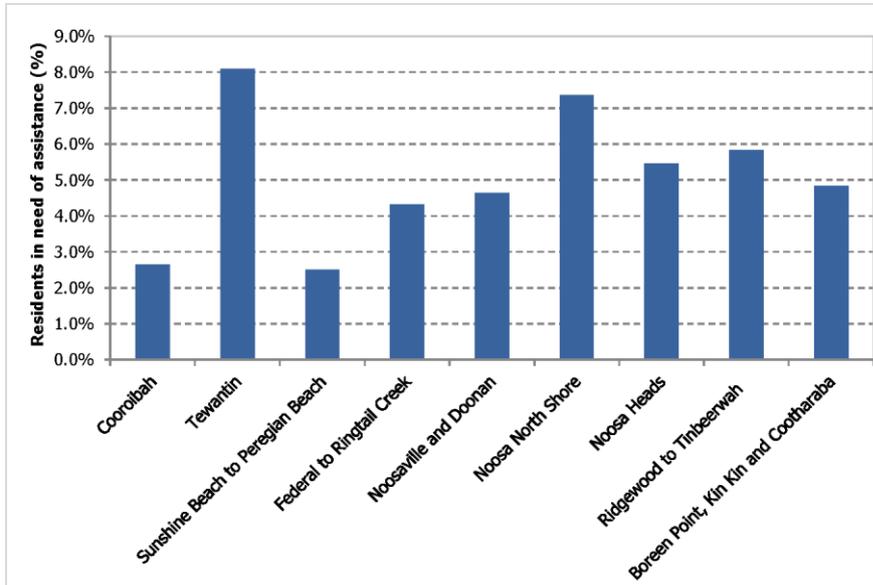


Residents needing assistance are defined as those that need assistance with one or more core activities including self-care, mobility and communication because of a long-term health condition, disability or old age.



Tewantin reported the highest proportion of residents in need of assistance with a core activity (8.1% or 862 residents) followed by Noosa North Shore (7.4% or 24 residents) (**Figure 8**). Sunshine Beach to Peregian Beach (2.5% or 255 residents) and Cooribah (2.6% or 46 residents) had the lowest proportions.

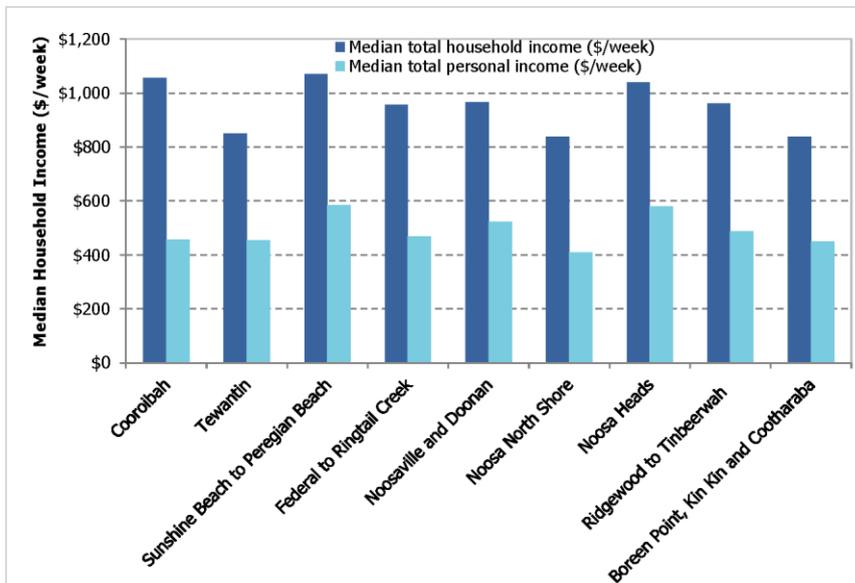
Figure 8. Residents in need of assistance, 2011



Source: AEC Group 2015;

Median household and personal incomes were the highest in Sunshine Beach to Peregian Beach (\$1,071 and \$585 per week respectively), and Noosa Heads (\$1,039 and \$580 per week respectively). Median household income was high in Cooribah compared to the other localities at \$1,056 per week, but median personal income was lower at \$456 per week.

Figure 9. Median household and personal income by locality, 2011



Source: AEC Group 2015;



2.2.2 Characteristics by Locality

A summary of the key demographic characteristics of each of these localities is provided below.

Cooroibah

- Cooroibah had a population of 1,740 on census night in 2011 (based on place of usual residence), and an estimated resident population of 1,815 people at 30 June 2011³.
- Between 2011 and 2015, the population was estimated to have grown at a strong average rate of around 1.9% each year, however due to the low population of this locality this equated to around just 35 people per year.
- The median age of the population was 43.2 years in 2011 which was below the median age for Noosa Shire at 45.9 years.
- Cooroibah had the highest average persons per household of any locality at 2.8 persons, compared to 2.4 persons for Noosa Shire, and 2.6 for Queensland. It also had the highest proportion of couple families with children, significantly higher than the other localities at 39.1% (around 10% points higher than any other locality). It also had the lowest proportion of lone person households of any of the localities, with 14.2% of households being lone person households.
- This locality had a high unemployment rate of 9.2% in 2011.
- The median household income in 2011 was \$1,056 per week which was the second highest household income for any of the localities, however the median individual income, at \$456 per week, was well below many of the other localities (including Sunshine Beach to Peregian Beach at \$585, Noosa Heads at \$580, Noosaville and Doonan at \$521 and Ridgewood to Tinbeerwah at \$488).

Tewantin

- Tewantin had a population of 10,648 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 10,358 people at 30 June 2011. It was one of the most populous localities. The highly populated locality of Tewantin reflects its rich history as the first town in the Shire and the role it plays today as the administrative centre for Noosa Shire.
- However, between 2011 and 2015, the population was estimated to have grown at a low average rate of around 0.2% per year. This was the lowest average annual growth rate of any of the localities.
- The median age of the population was 46.7 years in 2011, which was similar to the median age for Noosa Shire at 45.9 years. By June 2015 it is estimated to be 47.8 years, compared to 47.2 for the Shire.
- Tewantin had the highest proportion of lone person households of any of the localities with 28.1% of all households being lone person households. There was also a high proportion of one parent families in Tewantin with an estimated 13.1% of households being one parent households.
- Households in Tewantin on average have access to 1.5 vehicles which was slightly less than Noosa Shire and Queensland, both at 1.7 vehicles per household.

³ ERP figures at 30 June are calculated by adjusting census counts of usual residents to include those missed in the Census and those who were overseas on Census Night and also take account of births and deaths occurring between 30 June and Census Night (usually early August).



- This locality was considered the third most disadvantaged locality in Noosa Shire at 2011 with a SEIFA (Socio-Economic Indexes for Areas) relative disadvantage score of 965.8.

Sunshine Beach to Peregian Beach

- The population of Sunshine Beach to Peregian Beach was 10,178 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 10,626 people at 30 June 2011, making it one of the most populous localities. The relatively highly populated Sunshine Beach to Peregian Beach locality reflects the strong attraction of the surf beach and associated beach lifestyle.
- Between 2011 and 2015, the population was estimated to have grown at a strong average rate of around 1.8% each year. However, some of this population growth may have been inappropriately assigned to the area (instead of to the faster growing Peregian Springs area which is actually outside the LGA), and updated census population figures in 2016 may inform a revision to these population estimates.
- The median age of residents was 42.3 years in 2011. This was the youngest median age of any of the localities, and was lower than the median age for Noosa Shire at 45.9 years, but still higher than the median age for Queensland at 36.0 years.
- There was a high proportion of one parent families in this locality with an estimated 12.6% of households being one parent households.
- In other respects the locality was demographically similar to the Noosa Shire average.

Federal to Ringtail Creek, including Pomona and Cooran

- This locality had a population of 5,796 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 6,051 people at 30 June 2011.
- The median age of the population was 43.6 years in 2011 which was below the median age for Noosa Shire at 45.9 years.
- There was a high proportion of one parent families in Federal to Ringtail Creek with an estimated 13.4% of households being one parent households. This was the highest proportion of any of the localities in the Shire.
- In other respects the locality was demographically similar to the Noosa Shire average.

Noosaville and Doonan

- This locality had a population of 7,800 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 8,714 people at 30 June 2011.
- Between 2011 and 2015, the population was estimated to have grown at a strong average rate of around 2.1% each year which was the highest average annual growth rate of any of the localities.
- The median age of the population was 48.9 years in 2011 which was above the median age for Noosa Shire at 45.9 years, and much older than the median age for Queensland at 36.0 years.
- A high proportion of the population was born overseas at 27.8% compared to other localities, Noosa Shire and Queensland. Over 80% of people born overseas were born in English speaking countries, and about 60% were born in either New Zealand or the United Kingdom.
- A high proportion of households in this locality were couple families without children and lone person households. Of all households, 38.6% were couple families without children and 27.0% were lone person households.



- Noosaville and Doonan – along with the Noosa Heads locality – reported the lowest average persons per household out of all localities (both 2.2 persons), compared to 2.4 persons for Noosa Shire, and 2.6 for Queensland.

Noosa North Shore

- The Noosa North Shore locality had a population of just 327 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 342 people at 30 June 2011. Due to the relatively low absolute number, caution must be taken in interpreting demographic characteristics for this locality.
- Between 2011 and 2015, the population was estimated to have grown at a fairly low average annual rate of around 0.6% (or just 2 people per year).
- This locality had the oldest median age of any of the localities at 54.0 years in 2011. The median age of residents in Noosa North Shore was almost 10 years older than the median age of residents in Noosa Shire at 45.9 years, and much older than the median age for Queensland at 36.0 years.
- Noosa North Shore had a high unemployment rate of 12.2% in 2011, and this was the highest unemployment rate of any of the localities. This locality had a small population, and therefore just 18 unemployed people contributed to this unemployment rate.
- Median incomes were also low for individuals (\$409 per week), families (\$890 per week), and households (\$839 per week).
- This locality had the highest proportion of households being couple families without children of any of the localities with 42.8% of all households being of this type.
- The Noosa North Shore locality was considered the most disadvantaged locality in Noosa Shire at 2011 with a SEIFA (Socio-Economic Indexes for Areas) relative disadvantage score of 955.9.

Noosa Heads

- Noosa Heads had a population of 3,999 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 4,221 people at 30 June 2011..
- The median age of the population was 50.0 years in 2011 which was above the median age for Noosa Shire at 45.9 years, and much older than the median age for Queensland at 36.0 years.
- A high proportion of the population was born overseas at 26.4% compared to other localities, Noosa Shire and Queensland. Almost 80% of people born overseas were born in English speaking countries such as New Zealand and the United Kingdom.
- This locality had a high proportion of couple families with children with 41.3% of all households being of this type. Also, a high proportion of households in this locality were lone person households with 25.0% of all households being lone person households.
- Noosa Heads – along with the Noosaville and Doonan locality – reported the lowest average persons per household out of all localities (both 2.2 persons), compared to 2.4 persons for Noosa Shire, and 2.6 for Queensland.
- Households in Tewantin on average have access to 1.5 vehicles which was slightly less than Noosa Shire and Queensland, both at 1.7 vehicles per household.



Ridgewood to Tinbeerwah, including Cooroy and Lake Macdonald

- This locality had a population of 6,720 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 7,307 people at 30 June 2011.
- The median age of the population was 47.1 years in 2011, which was slightly higher than the median age for Noosa Shire at 45.9 years.
- In other respects the locality was demographically similar to the Noosa Shire average.

Boreen Point, Kin Kin and Cootharaba

- This locality had a population of 1,755 people on census night in 2011 (based on place of usual residence), and an estimated resident population of 1,833 people at 30 June 2011.
- Between 2011 and 2015, the population was estimated to have grown at a fairly low average annual rate of around 0.6%.
- The median age of the population was 47.6 years in 2011, which was slightly higher than the median age for Noosa Shire at 45.9 years.
- This locality had a high unemployment rate of 9.2% in 2011 and was considered the second most disadvantaged locality in Noosa Shire at 2011 with a SEIFA (Socio-Economic Indexes for Areas) relative disadvantage score of 959.3.

2.3 Policy and Strategy Framework

2.3.1 ShapingSEQ, Draft SEQ Regional Plan

The first statutory regional plan for SEQ came into effect in 2005, and the current regional plan (the South East Queensland Regional Plan 2009-2031) refined and modified the strategic directions, principles and policies of the first statutory plan, in response to changing circumstances and revised population forecasts.

The SEQ Regional Plan 2009–2031 is currently being reviewed, with a draft South East Queensland Regional Plan, 'ShapingSEQ', released for community consultation in October 2016. ShapingSEQ provides a framework for managing the region's growth over the next 25 years and sets a vision for the next 50 years. Its development has included significant consultation with state and local governments and the community in response to the region's expected changing population, both in size (5.3 million people by 2041) and demographics.

ShapingSEQ proposes policy directions and benchmarks to address this expected growth, including creating a region which is well-designed with communities that provide a diverse range of affordable living. It also seeks to boost jobs growth across the region, in the industries of the future. It also seeks an outward looking economy, given that SEQ lags behind Sydney and Melbourne where a greater proportion of the economy provides goods and services to recipients outside the region. ShapingSEQ will drive for a region that is smart, sustainable, compact, connected, safe and healthy for now and into the future.

ShapingSEQ adopts a new approach to identifying and calculating the urban land requirements for population and employment growth in SEQ. Previous regional plans for SEQ have defined the Urban Footprint on the basis of the theoretical capacity for accommodating growth. ShapingSEQ uses a more refined method in sizing the Urban Footprint, by identifying urban land on a realistic land supply basis. Benchmarks for infill and greenfields land in Noosa Shire to ensure at least 15 years of supply of land is maintained, together with expected population growth and dwelling supply, are shown below.



Table 2: Dwelling supply benchmarks 2011–41

Local government area	2011	2011–16	2011–41			2011–31*			
	Existing dwellings	Estimated total additional dwellings**	Total additional dwellings	Additional infill dwellings***	Total % of additional dwellings as infill	Additional greenfield dwellings	Total additional dwellings	Additional infill dwellings***	Additional greenfield dwellings
Brisbane	423,800	37,900	223,400	210,600	94%	12,800	145,500	139,400	6100
Gold Coast	217,100	20,300	176,500	139,000	79%	37,500	108,200	81,100	27,100
Ipswich	62,500	8800	121,300	31,600	26%	89,700	67,200	18,200	48,900
Lockyer Valley	13,300	1900	10,600	0	0%	10,600	7000	0	7000
Logan	99,900	9500	98,700	25,000	25%	73,700	53,600	16,700	37,000
Moreton Bay	146,900	17,200	105,600	54,900	52%	50,700	72,400	36,000	36,400
Noosa	24,200	2000	8100	4600	57%	3500	5900	3,200	2700
Redland	55,100	3500	21,100	14,400	68%	6700	16,200	10,800	5400

Sub-regional growth

Tables 16 and 17 show the expected population growth, and dwelling supply and employment planning benchmarks for the sub-region, to 2041. These will guide state agencies and local governments in preparing more detailed planning.

Table 16: Northern sub-region current estimates and future supply benchmarks

Local government	Population 2011	Population 2015*	Expected population growth 2015–41	Dwellings 2011	Additional dwellings 2011–41	Jobs 2011	Additional jobs 2011–41
Sunshine Coast	267,241	287,500	207,500	113,600	99,300	112,500	80,500
Noosa	51,038	53,500	9500	24,200	8100	21,700	11,800
Total for sub-region	318,279	341,000	217,000	137,800	107,400	134,200	92,300

* Estimated resident population

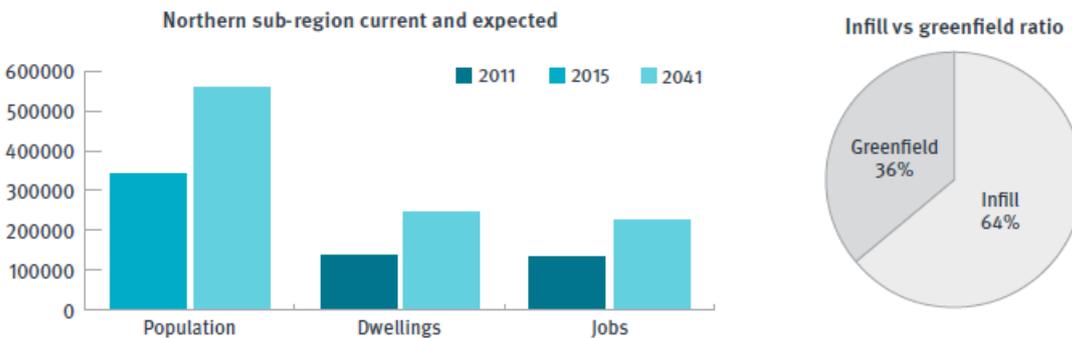


Table 17: Northern sub-region infill and greenfield dwelling supply benchmarks

Local government	Additional dwellings 2011–41*		
	Infill	Greenfield	Total
Sunshine Coast	64,200	35,100	99,300
Noosa	4600	3500	8100
Total for sub-region	68,800	38,600	107,400

* Figures based on ShapingSEQ policy



2.3.2 State Planning Policy – State Interest Guideline, Housing Supply and Diversity, April, 2016

The State Planning Policy (SPP) State Interest Guideline for Housing Supply and Diversity (Queensland Government 2016c) outlines the State Government's expectations for Local Governments to contribute to diverse, accessible and well-serviced housing (and land for housing) including core concepts such as:

- Housing in well-serviced locations including locations close to facilities and services, transport, education and health services, employment opportunities, community services and leisure/lifestyle opportunities;
- Diverse housing options providing a wide range of housing types, sizes and tenures required to meet the needs of the particular communities – including variations in lot size, house size, dwelling type, built form, density, cost, adaptability, location and tenure;
- Well-designed housing;
- Adaptable housing providing for the accommodation needs of users of all ages and abilities;
- Non-resident workforce accommodation.

There are four policies in the guideline for integrating the principles of housing supply and diversity into planning schemes, being:

- Locating land for housing development and redevelopment in areas that are accessible and well connected to services, employment and infrastructure;
- Facilitating a diverse and comprehensive range of housing options that cater for the current and projected demographic, economic and social profile of the Local Government Area;
- Providing for best-practice, innovative and adaptable housing design;
- Providing sufficient land to support the projected workforce population where housing is required for non-resident workforce accommodation associated with large-scale approved mining, agriculture, industry or infrastructure projects.

Amendments have been made to the policy through an updated State Planning Policy Draft for Consultation, which was open for public comment from 21 November 2016 to 10 February 2017, to commence alongside the new planning legislation on 3 July 2017. The draft State Planning Policy (SPP) strengthens the requirement for Local Governments to support affordable and social housing outcomes through the planning system. This includes ensuring there is sufficient and appropriately zoned land for housing, specifying the lowest level of assessment for residential land uses to avoid or minimise regulatory barriers or inefficiencies, and considering the use of incentives for the delivery of affordable and social housing, particularly in areas in close proximity to services and amenities.

All the following policies must be considered and appropriately integrated in policy and development assessment outcomes in a local planning instrument.

- 1) Land for housing development and redevelopment in areas that are accessible and well-connected to services, employment and infrastructure is identified.
- 2) Develop residential land to address and cater for all groups in the current and projected demographic, economic and social profile of the Local Government Area, including households on low to moderate incomes.



- 3) Deliver a diverse, affordable and comprehensive range of housing options in accessible and well serviced locations through:
 - o appropriate, responsive and proactive zoning
 - o supporting an appropriate mix of lot sizes and dwelling types, including housing for seniors and people requiring assisted living
 - o considering incentives for the delivery of affordable and social housing, particularly in areas in close proximity to services and amenities.
- (4) Best practice, innovative, and adaptable housing design and siting is provided for and encouraged.
- (5) Sufficient zoned land for housing is provided in appropriate locations to support the projected non-resident workforce population associated with approved large-scale mining, agriculture, industry or infrastructure projects.

2.3.3 Queensland Housing Strategy, Discussion Paper (2016)

The Queensland Government is presently working on a 10-year Housing Strategy to help build better housing futures for all Queenslanders.

The new Housing Strategy will support the Government's aims to provide safe, secure and affordable housing options for all Queenslanders. The strategy will also guide the Government in providing quality housing and homelessness services into the future.

In March this year, a Discussion Paper, *Working Together for Better Housing and Sustainable Communities* was released for public consultation (Queensland Government 2016d). The document proposes an integrated homelessness and housing assistance service system under one inclusive Strategy. It recognises that there is a growing shortage of affordable housing for rent and purchase in many markets across the State, and the housing system overall is struggling to respond to people's changing needs. It also acknowledges that the housing affordability challenges facing people vary significantly from region to region and that each community in Queensland has its own unique social, cultural, and local climatic factors that impact people's housing needs. A 'balanced housing market' - a mix of rental, ownership and other housing options - may be different from place to place.

The private rental market is noted to be not working well for many people who rely on it. Recent research found that more than half of Australia's low income tenants are being driven into poverty by unaffordable rents. On average, the Australian house price is now approximately 4-5 times the average annual household earnings. High deposit requirements and increased costs of living mean that home ownership, especially for young people, is becoming out of reach. For example, home ownership in the prime 25 – 34 year age group has slumped from 56% in 1982 to only 34% in 2011. This has resulted in more people staying in the private rental market for longer periods and an increase in the demand for social housing and homelessness assistance.

The lack of affordable housing for rent and purchase was found to have impacts across the community, in particular for:

- Women, who tend to be vulnerable to housing stress and homelessness;
- Single parent families;
- Young people, who face particular challenges meeting their basic needs and experience difficulties in accessing and sustaining tenancies due to discrimination and poverty;



- People with a disability and their carers who are 36% more likely to experience housing stress compared to the general population. This is because of a lack of appropriate housing, high costs of relocation and lower earning capacity;
- Aboriginal and Torres Strait Islander people who are over-represented amongst those experiencing homelessness, struggling to access housing and residing in overcrowded dwellings;
- People from culturally and linguistically diverse (CALD) backgrounds who experience difficulty in obtaining and sustaining suitable housing;
- Older people, who are increasingly vulnerable to housing stress and homelessness due to their fixed incomes.

The Housing Strategy is expected to be delivered in early 2017.

2.3.4 Noosa Social Strategy 2015

Noosa Social Strategy was adopted by Council in 2015 as a framework to continue to improve the wellbeing and cohesiveness of the community, and address the social opportunities and challenges faced in the future. As well as the strategy, an implementation plan includes new initiatives, ongoing commitments and actions and performance indicators to be reported on every 12 months, and reviewed every 3-5 years.

Key issues with potential implications for housing identified in the strategy include:

- Overall, there is a need for improved coordination and collection of local data to better inform decision making;
- The older and ageing population is creating additional demand for services for seniors;
- Emerging vulnerable groups in the community include some lone person households, LGBTI+ people (lesbian, gay, bisexual, trans, intersex), and disengaged young people;
- Homelessness is an increasing issue especially for young people – the strategy suggests that a multi-faceted, coordinated approach with strong partnerships between government, not-for-profit groups, and the community is needed to address homelessness;
- Availability of affordable housing (and limited housing diversity), rental housing and short-term crisis housing were raised as issues – the shortage of affordable housing contributing to homelessness;
- Access to government services including health and other services is limited for residents without access to reliable transport;
- Availability of support, respite and affordable independent living options is limited for young people and adults with an intellectual or physical disability (and their carers);
- NDIS and aged care reform, and the pace of these policy changes, is impacting the community, Council, individual residents, and organisations providing services;
- Gaps in public and community transport are restricting access to support services, employment and social options especially for hinterland residents and young people.

The strategy groups social aspirations into four themes: cohesive and resilient community, active and healthy community, accessible, diverse and affordable community, and creative and informed community.



Within the 'accessible, diverse and affordable communities' theme, the strategy suggests that Council aim to encourage accessible and affordable spaces and places for people to live, meet and play, and influence housing affordability by encouraging a diversity of housing opportunities.

Key initiatives under this theme of relevance to the Housing Needs Assessment include that Council will:

- Plan for an increase in the number of elderly people living independently;
- Advocate for flexible respite opportunities for older frail people and people with a disability;
- Undertake a Housing Needs Assessment (the current study) to inform planning and future advocacy;
- Work with government agencies, not-for-profit organisations and the business sector to explore innovative ways of tackling housing affordability;
- Continue to facilitate public transport, walking and cycling facilities to lessen reliance on private vehicles.

2.3.5 Noosa Shire Council Local Economic Plan

The Local Economic Plan for the Noosa Shire was released in 2015 with the aim of broadening the economic structure of the local economy by "*achieving growth in smart industry sectors that offer high economic value and low environmental impact*".

The economic plan noted that the economic structure of the Noosa Shire is heavily reliant on tourism, retail and construction. Tourism is identified as a key strength for the region's economy and an opportunity for the future, as well as a weakness in that there is a reliance on tourism in the local economy. While acknowledging that tourism, retail and construction will continue to be important components of the economy, it emphasises the need for diversification.

With regard to tourism, the plan notes that in the year ending June 2015, tourism contributed an estimated \$700 million into the local economy supported by growth in international and interstate visitors (but declines in day trip visitors).

Key themes to achieve a strong economy include:

- Industry diversification;
- Effective land use planning;
- Enterprise support;
- Essential infrastructure;
- Skilled and connected businesses and implementation;
- Monitoring and reporting.

Priority industry sectors of competitive advantage identified to support economic growth and provide employment opportunities are:

- Health and wellness;
- Digital economy;
- Environmental industries;
- Rural enterprise;



- Education and Training;
- Tourism;
- Creative industries;
- Professional services.

Strategies to achieve diversification into these industries included:

- Collaboration and clustering opportunities;
- Education and training opportunities;
- Access to high speed broadband infrastructure;
- Use of technology in business.

2.3.6 Sunshine Coast Regional Council Housing Needs Assessment, Background Study, 2009

The Background Study to the Sunshine Coast Housing Needs Assessment (2009) considered a range of indicators of population and housing for the former Sunshine Coast Regional Council Local Government Area (before Noosa Shire Council de-amalgamated), and identified a number of key issues and housing needs.

Much of the data included in the report is no longer relevant as it has been superseded by updated data or has been provided for the whole of the former Local Government Area (LGA), which is dominated by areas that are now not part of Noosa Shire. However some information continues to be relevant and has been summarised here.

Key findings included:

- The housing mix does not match the demographic profile – including the ageing population;
- Declining home ownership is occurring among younger households, particularly among low to moderate income aspiring first home buyer households;
- Housing (purchase and rental) is expensive relative to other areas;
- A trend for tourist and visitor accommodation to be rented by permanent residents;
- Levels of housing stress are high;
- Levels of social housing are extremely low;
- Housing inadequately matches the needs of people with special needs;
- Housing preferences need to diversify;
- Housing will need to change.

The background study identified the following key issues for the region:

- A mismatch between income and housing costs (housing affordability);
- A mismatch between the housing form and the household profile;
- A mismatch between the current urban form and aspirations of sustainability;
- A mismatch between current and required aged care accommodation provision;
- A low provision of social housing and universally designed housing.



The region was identified as one of the least affordable regions in Australia, and notes that the local community identified housing affordability and appropriate housing as key issues. The trend towards smaller housing forms was not evident with large detached houses on large blocks being the dominant dwelling type and the dwelling size has continued to increase.

Policy directions recommended to address the mismatch in housing and household types included:

- Increasing the diversity of housing stock;
- Encouraging the provision of smaller and more modest housing forms;
- Increasing the provision of affordable housing, social housing and housing for special needs groups;
- Encouraging housing types to improve sustainability on the Sunshine Coast and encouraging areas of higher density where it is considered appropriate;
- Improving understanding of housing preferences.

The following indicative targets were suggested to be achieved by 2031:

- A reduction in detached housing from 76% to 53% of the housing stock;
- An increase in semi-detached dwellings from 10% to 26%;
- An increase in attached dwellings from 12% to 20%;
- A target of 33% affordable housing to reduce high levels of housing stress;
- A target to achieve the State provision level of social housing (3.9%) by 2011 and the National provision level (4.9%) by 2016;
- A target of 18% universal design and adaptable housing by 2031;
- An ongoing target of 40 high care beds, 40 low care beds, and 25 home care packages per 1,000 population 70+ years of age.

The dwelling targets are reflected in the figures below:

Population/Households	2006	2011	2016	2021	2026	2031
Projections						
Projected Population	295,084	339,663	381,458	421,343	460,862	501,179
Projected Households	122,811	145,690	172,166	196,779	220,146	238,657
Dwelling Targets						
Detached Dwellings	-	101,983 (70%)	111,908 (65%)	118,067 (60%)	121,080 (55%)	126,488 (53%)
Semi-Detached Dwellings	-	18,940 (13%)	30,990 (18%)	41,324 (21%)	55,037 (25%)	62,051 (26%)
Attached Dwellings	-	20,397 (14%)	27,547 (16%)	35,420 (18%)	41,828 (19%)	47,731 (20%)
Other Dwellings	-	2,549 (2%)	2,582 (1.5%)	2,460 (1.5%)	2,201 (1%)	2,387 (1%)
Total Dwellings	-	145,690 (100%)	172,166 (100%)	196,779 (100%)	220,146 (100%)	238,657 (100%)



The methodology for estimating dwelling targets included making assumptions about indicative dwelling preferences of various household types and these are outlined below:

Household Type	Detached		Semi-Detached		Attached	
	2006	Target	2006	Target	2006	Target
Couple families with children	93.2%	80%	3.0%	10%	3.2%	10%
Couple families without children	78.0%	30%	10.6%	35%	9.8%	35%
One parent families	78.3%	50%	9.8%	25%	10.7%	25%
Lone person households	53.0%	20%	19.0%	40%	23.1%	40%
Group households	66.0%	50%	12.1%	25%	20.5%	25%
Other households	-	40%	-	30%	-	30%

2.3.7 Residential Development Strategy for Noosa Shire, 2007

The 2007 Residential Development Strategy for Noosa Shire Council area examines population and household characteristics, and investigates options for the future.

The Strategy notes that the SEQ Regional Plan 2005 sought an additional 4,200 dwellings (2,500 infill dwellings and 1,700 greenfield dwellings) in Noosa Shire by 2026. Population projections for Noosa Shire Council area at the time suggested a 2026 population of approximately 58,230 residents.

Desired residential outcomes included that residential development:

- Occurs on land which is suited for the intended form of subdivision, the development of residential buildings and the occupation and use of the building and site by the residents;
- Occurs on land which is not located in the vicinity of land uses which would adversely impact the occupation and use of buildings and the site by the residents; or which would result in the residential development preventing or inhibiting the conduct of existing land uses;
- Is designed within the planned capacities of roads, community services and infrastructure;
- Is consistent with the developed character of its particular neighbourhood;
- Is conveniently located in relation to urban services;
- Is energy efficient, with siting and design consistent with climatic conditions;
- Is water efficient, with rainwater captured and reused on site;
- Adopts water sensitive urban design measures in new subdivisions and large developments;
- Is accessible and comfortable for residents of all ages and with various physical needs;
- Has appropriate levels of safety and security for the occupants;
- Is adequately serviced in a timely, cost effective, coordinated and efficient manner;
- Incorporates a design and density which integrates with the urban and landscape fabric of its particular locality;



- Provides residents with a high degree of privacy and protection from noise, lighting and other environmental nuisances;
- Provides residents with a choice in housing types to meet their varying needs;
- Does not adversely impact on the natural character and environmental values of the Shire including environmentally sensitive landscapes.

The Residential Strategy notes that the Shire is a popular visitor destination and that the mix of residents and short-term accommodation has the potential to create conflicts. It notes that where there is conflict, the protection of residential amenity should prevail.

Holiday resorts should be reserved for short-term visitor accommodation rather than permanent residents. Noosa Heads, Noosaville and Sunshine Beach were identified as the dominant urban visitor accommodation areas.

The strategy draws on the concept of 'smart housing', which is housing that is designed to consider social, environmental and economic efficiency, including universal design and design that reduces the risk of household injuries. The smart housing principles were incorporated into the *Noosa Plan*⁴ wherever possible. The strategy notes that Council has previously indicated a desire to further advance this work on smart housing and universal design, including perhaps advocating for changes to building codes which might be outside the scope of the planning scheme.

As well as noting broad nationwide causes of housing affordability issues, the strategy suggests that affordability is a particular issue in Noosa Shire due to employment being frequently in low skilled, casual or part-time positions. Hospitality workers, sales assistants, transitory and young workers are considered particularly vulnerable to housing affordability issues. The strategy suggests that affordable housing strategies should be developed at a regional level (that is, including Gympie Regional Council and Sunshine Coast Council areas) particularly as Noosa Shire has forecast low population growth. It also suggests that any surplus Council-owned land should be used to support low cost housing outcomes rather than being sold off to a potentially unknown future.

The Residential Development Strategy made a number of recommendations including:

- A new administrative definition for a small dwelling unit (which includes no more than one bathroom and two bedrooms with no study or media room or other room suitable for use as a bedroom) could be included and positive discrimination used to encourage provision;
- A new definition for group house be included which could accommodate a group of 6-10 unrelated adults where each resident has a private bedroom but the kitchen, dining and laundry facilities are shared. Each room could have an ensuite bathroom, or shared bathroom facilities. This could be an affordable model for older people to reduce social isolation, students, single people on low-incomes and people with certain disabilities;
- Remove the need for the occupant of an annexed flat to be a relative or employee, and make these self-assessable in the detached housing and rural settlement zones;
- Reduce the need to provide one visitor car park accessible at all times for duplex development, and revisit car parking requirements for multiple housing;

⁴ The Noosa Plan is the current planning scheme for the Noosa Shire and sets down the planning framework to guide its future. The plan first commenced in February 2006 and has been amended several times since. The current version of The Noosa Plan is dated 28 October 2016, after recent amendments.



- Promote one to two bedroom units through bonus development rights;
- Continue to lobby State regulations on universal housing standards;
- Encourage construction of smaller houses and units, rather than large dwellings;
- Work with and support local and regional housing providers to provide low cost, medium to long term housing;
- Review large parcels of Council-owned land to determine if suitable for redevelopment as low cost housing;
- Investigate the extent to which houses in the detached housing zone are let for short-term holiday rental and the resultant impact on neighbouring residential amenity.

2.3.8 Sunshine Coast Affordable Living Strategy, 2010-2020

The Sunshine Coast Affordable Living Strategy 2010-2020 was developed by the combined Sunshine Coast Regional Council and released in 2010.

The concept of affordable living includes more than just the financial cost of accommodation but incorporates the way in which we live, the size and type of dwelling we live in, the resources we use and how we move around.

The strategy includes a framework to achieve affordable living with seven principles:

- Housing diversity: diverse housing choices for a diverse community;
- Housing affordability: housing to suit all income levels;
- Self-contained neighbourhoods: local opportunities;
- Transport options: A range of transport choices;
- Supportive environments: great places and spaces;
- Resource efficiency: A minimal environmental footprint;
- Economic development: Shared prosperity;

Planning and policy actions identified in the 2010 strategy that could be relevant have been included below:

Principle	Action
Housing Diversity	Continue to support and participate in various projects such as the Housing Affordability Fund, Electronic Development Assessment project, Target 5 Days project and Model Code for Smart Growth and Next Generation Planning projects as well as the Liveable Compact Cities projects and incorporate recommendations in planning and policy.
	Encourage innovative housing solutions such as co-housing, sustainable and flexible housing in appropriate locations.
	Prepare and adopt guidelines similar to the ULDA's design guidelines that stimulate the delivery of a more diverse housing product including row housing, shop top housing, co-housing and terrace housing.
	Adopt housing targets set out in the Sunshine Coast Housing Needs Assessment background study.
	Support property industry initiatives that deliver innovative and creative housing solutions through good leadership, recognition and responsive, innovative and efficient development assessment services.



Principle	Action
Housing Affordability	Develop a range of policy incentives that provide a sliding scale of support for social and identified affordable housing projects.
	Develop a planning and assessment framework and fast-track assessment system for affordable housing projects.
	Extend current policy which permits a reduction in car parking from planning scheme requirements and incentives for social housing to include identified affordable housing to support ongoing investment
	Discourage residential development in areas with high impacts upon affordability such as filling in flood plains, areas with limited provision of services and developments dependent upon extensive private vehicle use.
	Consider provisions in the planning scheme that require a prescribed mix of dwelling unit sizes in housing projects comprising of more than six dwellings.
	Consider provisions in the planning scheme that permit compliance assessment of secondary dwellings on residential allotments
	Investigate mechanisms for the protection of existing caravan parks and manufactured home villages.
	Plan for the provision of suitable land and investigate mechanisms within the planning scheme that enable caravan parks and manufactured home villages to be established in master planned emerging communities.
Self-Contained Neighbourhoods	Continue to plan for urban centres in an integrated approach using place making and TOD planning principles to strengthen activity centres.
	Ensure planning scheme provisions encourage self-containment by considering opportunities for increased housing choice with adequate access to services and facilities
	Utilise policy and tools such as the planning scheme, economic initiatives and modelling to ensure residential areas contain business and employment opportunities to encourage locally based jobs such as mixed development and home-based businesses.
Transport	Ensure network planning of public transport infrastructure, walk and cycle links are delivered in conjunction with development of new communities.
	Include provisions in the planning scheme and other guidelines/standards which improve safety outcomes for pedestrians and cyclists, as well as pedestrian access around public transport stops.
	Prepare subdivision guidelines within the new planning scheme and master planned communities that support permeable subdivision layouts that encourage pedestrian and cycle use.

The strategy has since been updated to de-amalgamated boundaries.

2.3.9 Implications for Housing Provision

The review of the policy context indicates that Noosa Shire has several long-standing housing issues which have been outside the ability of past planning schemes to resolve alone. Key issues appear to include:

- Housing affordability, especially for low income households and key workers;



- A lack of accessible or adaptable housing for older people and people with special needs;
- A mismatch of housing size and household size (albeit some may be by choice or circumstance);
- A shortage of affordable and appropriate aged accommodation;
- A lack of housing diversity, and particularly smaller dwellings;
- Low levels of social and emergency housing;
- Conflict between resident and visitor accommodation.

The study will focus on investigation of these issues, and inform the forthcoming planning scheme with the aim of addressing these issues to the extent possible through land use planning. Other mechanisms and policy recommendations may also be required to overcome entrenched issues which are outside the scope of the planning scheme.



3. EXISTING HOUSING SUPPLY AND DWELLING CHARACTERISTICS

3.1 Private Housing Market Characteristics

3.1.1 Total Dwellings

There were a total of 25,419 dwellings counted in Noosa Shire at the 2011 Census. Of these, 20,713 dwellings were occupied on Census night (75.2%), 4,559 were unoccupied (17.9%)⁵, and 147 were non-private dwellings (0.6%) (for example, residential aged care homes and hospitals) (**Table 3**). The proportion of unoccupied dwellings in Noosa Shire was much higher than for Queensland as a whole (17.9% for Noosa Shire, compared to 9.7% for Queensland). Approximately 1,602 dwellings were occupied by visitors/tourists on Census night, and these dwellings made up around 6.3% of all of the dwellings in Noosa Shire, or 7.7% of all occupied private dwellings.

Table 3. Dwellings, Noosa Shire, SEQ and Queensland, 2011

Dwelling Type	Noosa Shire	SEQ	Queensland
Occupied private dwellings	20,713 (81.5%)	1,150,971 (91.2%)	1,648,541 (90.0%)
Occupied private dwellings – Residents	19,111 (75.2%)	1,096,686 (86.9%)	1,547,304 (84.5%)
Occupied private dwellings – Visitors only	1,602 (6.3%)	54,285 (4.3%)	101,237 (5.5%)
Unoccupied private dwellings	4,559 (17.9%)	108,085 (8.6%)	177,914 (9.7%)
Total	25,272 (99.4%)	1,259,056 (99.8%)	1,826,455 (99.7%)
Non-private dwellings	147 (0.6%)	2,419 (0.2%)	5,412 (0.3%)
Total (including non-private dwellings)	25,419 (100.0%)	1,261,475 (100.0%)	1,831,867 (100.0%)

Notes: Excludes migratory, off-shore and shipping dwellings.

Source: ABS 2013a;

3.1.2 Dwelling Type

Of the 25,272 private dwellings in Noosa Shire in 2011, 18,828 were detached or separate houses (74.5%), 2,489 were semi-detached (9.8%), 3,328 were attached (13.2%) and 618 were other dwelling types (2.4%). **Table 4** and **Figure 10** below summarise the numbers and proportions of the different dwelling types for both unoccupied and occupied dwellings as well as dwellings occupied by residents and visitors/tourists.

Larger proportions of unoccupied dwellings and dwellings occupied only by visitors are attached dwellings, compared to dwellings occupied by residents. Around 24% of unoccupied dwellings and 28% of dwellings occupied only by visitors were attached dwellings, compared with just 9.4% of dwellings occupied by residents being attached.

⁵ 19.3% if excluding dwellings occupied by visitor only households



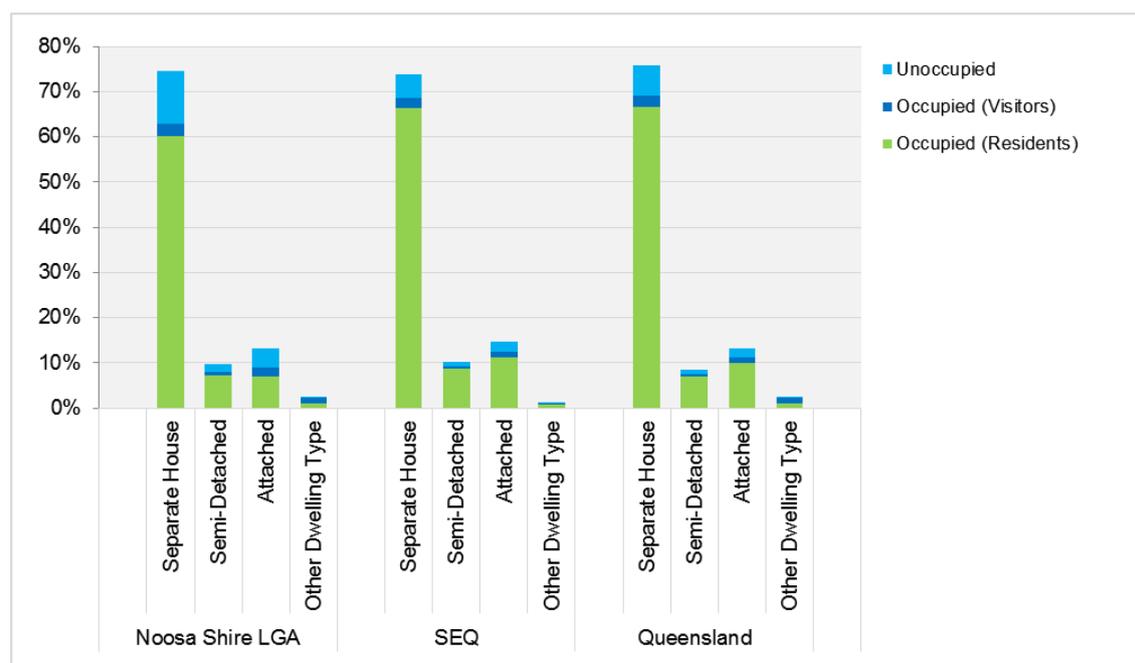
Table 4. Dwellings by Dwelling Type, Noosa Shire, 2011

Dwelling Type	Separate House	Semi-Detached	Attached	Other Dwelling Type	Not Available/ Not Applicable	Total
Occupied private dwellings	15,890 (62.9%)	1,991 (7.9%)	2,244 (8.9%)	579 (2.3%)	9 (0.0%)	20,713 (82.0%)
Occupied private dwellings – Residents	15,190 (60.1%)	1,858 (7.4%)	1,790 (7.1%)	267 (1.1%)	6 (0.0%)	19,111 (75.6%)
Occupied private dwellings - Visitors only	700 (2.8%)	133 (0.5%)	454 (1.8%)	312 (1.2%)	3 (0.0%)	1,602 (6.3%)
Unoccupied private dwellings	2,938 (11.6%)	498 (2.0%)	1,084 (4.3%)	39 (0.2%)	0 (0.0%)	4,559 (18.0%)
Total	18,828 (74.5%)	2,489 (9.8%)	3,328 (13.2%)	618 (2.4%)	156 (0.6%)	25,272 (100%)

Source: ABS 2013a;

Although Noosa Shire had a similar proportion of separate houses to the SEQ Region and Queensland, a larger proportion of these dwellings were unoccupied on Census night.

Figure 10. Dwelling Type, Noosa Shire, SEQ and Queensland, 2011



Source: ABS 2013a;

Most common Census indicators consider only dwellings occupied by residents on Census night. If only dwellings occupied by residents on Census night are included, Noosa Shire reported a similar dwelling structure to the SEQ Region and Queensland, with 79.5% of private dwellings being separate houses, compared to 76.1% for the SEQ Region and 78.5% for Queensland (**Table 5**).



Table 5. Dwelling Type, Occupied Residents, Noosa Shire, SEQ and Queensland, 2011

Dwelling Type	Noosa Shire	South East Queensland	Queensland
Separate House	15,190 (79.5%)	76.1%	78.5%
Semi-Detached	1,858 (9.7%)	10.1%	8.4%
Attached	1,790 (9.4%)	12.8%	11.7%
Other Dwelling Type	267 (1.4%)	0.9%	1.3%
Total Dwellings	19,111 (100%)	100%	100%

Notes: Excluding visitor only households. Excluding dwellings unoccupied on Census night.

Source: ABS 2013a;

3.1.3 Household Type by Dwelling Type

Of the 19,111 dwellings occupied by residents in Noosa Shire, 6,492 dwellings were occupied by couples without children (34.0%), 4,847 dwellings were occupied by couples with children (25.4%), 4,665 were occupied by lone person households (24.4%), and 2,192 were occupied by one parent families (11.5%) (**Table 6**). A small number and proportion of dwellings were occupied by group households (793, 4.1%) and other family types (120, 0.6%).

Noosa Shire had a higher proportion of lone person households (24.4%) than the SEQ Region (22.4%) and Queensland (22.8%). The other three household composition categories were slightly lower for Noosa Shire when compared to the SEQ Region and the State. At least 58.4% of all occupied dwellings in Noosa Shire were usually occupied by one person living alone, or a couple.

A high proportion of couples with children lived in separate houses (93.9%), followed by couples without children (83.3%), one parent families (82.3%), group households (73.5%), other family types (70.0%) and lone person households (59.2%).

Of all of the attached dwellings in Noosa Shire, 50.00% were occupied by lone person households, and 23.6% by couples without children. Of the semi-detached dwellings, 46.4% were occupied by lone person households, and 31.9% by couples without children. Of the separate houses, 35.6% were occupied by couples without children, and 30.0% by couples with children.



Table 6. Household Type by Dwelling Type, Noosa Shire, 2011

Household Type	Separate House	Semi-Detached	Attached	Other Dwellings	Total Households
Couple with no children	5,405	593	423	71	6,492 (34.0%)
Couple with children	4,550	120	156	21	4,847 (25.4%)
One parent family	1,805	186	178	23	2,192 (11.5%)
Other family	84	9	24	3	120 (0.6%)
Total Families	11,844	908	781	118	13,651 (71.4%)
Lone person household	2,763	862	897	143	4,665 (24.4%)
Group household	583	87	115	8	793 (4.1%)
Total Households	15,190 (79.5%)	1,857 (9.7%)	1,793 (9.4%)	269 (1.4%)	19,109 (100%)

Notes: Only primary family type counted for multi-family households. Excluding visitor only households. Excluding dwellings unoccupied on Census night.

Source: ABS 2013a;

3.1.4 Household Size and Dwelling Size

The Shire reported a lower average persons per household (2.4) compared to the SEQ Region (2.6) and the State (2.6).

Around 25% of all occupied dwellings in Noosa Shire had only one person living in them, and around 42% had two people living in them (**Table 7**). Around 45% of all occupied dwellings had three bedrooms, a further 27% had four bedrooms, and 18% have two bedrooms.



Table 7. Household Size by Dwelling Size, Noosa Shire, 2011

Household Size	Bedrooms						Not stated	Total
	None	1	2	3	4	5+		
One person	73	548	1,443	1,873	501	61	168	4,667 (24.4%)
Two persons	22	183	1,506	3,973	2,030	215	78	8,007 (41.9%)
Three persons	7	8	286	1,363	894	137	19	2,714 (14.1%)
Four persons	0	11	107	1,015	1,168	183	13	2,497 (13.1%)
Five persons	3	0	19	244	458	149	6	879 (4.6%)
Six persons	0	0	3	56	115	86	0	260 (1.4%)
Seven persons	0	0	0	7	30	25	0	62 (0.3%)
Eight or more persons	0	0	0	6	12	10	0	28 (0.1%)
Total	105 (0.5%)	750 (3.9%)	3,364 (17.6%)	8,537 (44.7%)	5,208 (27.2%)	866 (4.5%)	284 (1.5%)	19,114 (100%)

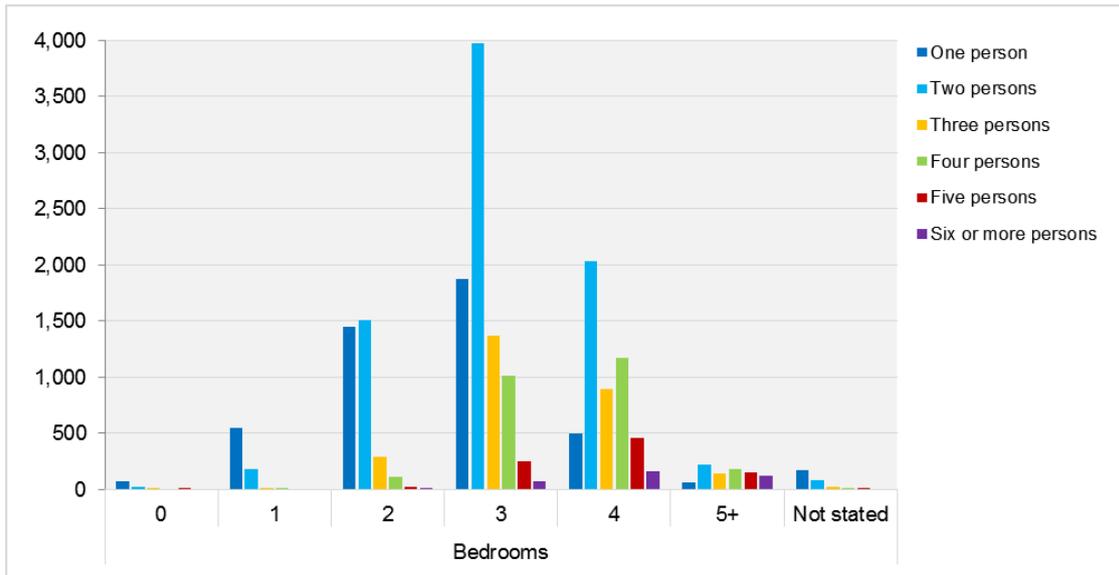
Notes: Excluding visitor only households. Excluding dwellings unoccupied on Census night.

Source: ABS 2013a;

This data is shown graphically on **Figure 11** and demonstrates the high proportion of two person households in Noosa Shire, and that these households are primarily living in 3-bedroom dwellings. The second most frequent dwelling type for two person households was 4-bedroom dwellings.



Figure 11. Household Size by Dwelling Size, Noosa Shire, 2011

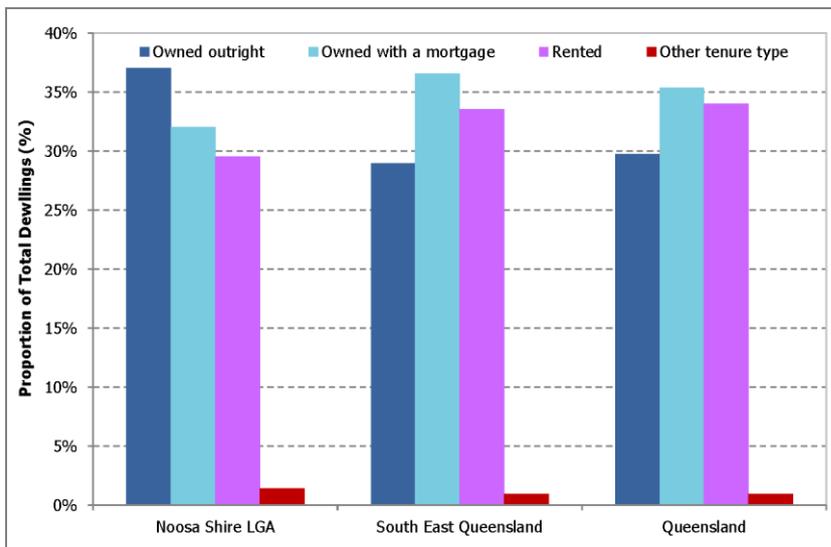


Notes: Excluding visitor only households. Excluding dwellings unoccupied on Census night.
Source: ABS 2013a;

3.1.5 Housing Tenure

The Shire reported a considerably higher proportion of dwellings owned outright (37.0%) when compared to the SEQ Region (29.0%) and the State (29.7%) (**Figure 12** and **Table 8**). Fewer people were paying off a mortgage in the Shire (32.0%) compared to the SEQ Region (36.6%) and the State (35.4%). Dwellings in the Shire are less likely to be rented (29.5%) compared to the SEQ Region (33.5%) and the State (34.0%).

Figure 12. Tenure Type, Noosa Shire, SEQ and Queensland, 2011



Notes: Excluding visitor only households. Excluding dwellings unoccupied on Census night. Excluding tenure not stated.

Source: AEC Group 2015;



Table 8. Dwelling tenure, Noosa Shire, SEQ and Queensland, 2011

Dwelling Type	Noosa Shire	South East Queensland	Queensland
Owned Outright	6,935 (37.0%)	29.0%	29.7%
Owned with Mortgage	5,994 (32.0%)	36.6%	35.4%
Rented	5,534 (29.5%)	33.5%	34.0%
Other Tenure Type	264 (1.5%)	0.9%	0.9%
Total	18,727 (100%)	100%	100%

Notes: Excluding visitor only households. Excluding dwellings unoccupied on Census night. Excluding tenure not stated.

Source: AEC Group 2015;

3.1.6 Rental Stock - Bonds held by RTA 2011-2016

In the June Quarter 2016, the Residential Tenancies Authority (RTA) held a total of 4,378 rental bonds in Noosa Shire (**Figure 13**). Around 1,450 of these dwellings were located in Noosa Heads and Southern Coast (33%), 1,190 were located in Tewantin and Northern Coast (27%) and 1,010 were located in Munna Pt and Noosaville (23%). There were small proportions in the Hinterland, with the highest of these in Cooroy and Surrounds. These areas are based on postcodes and therefore do not align with other data in this report based on statistical boundaries defined by the ABS. The areas are:

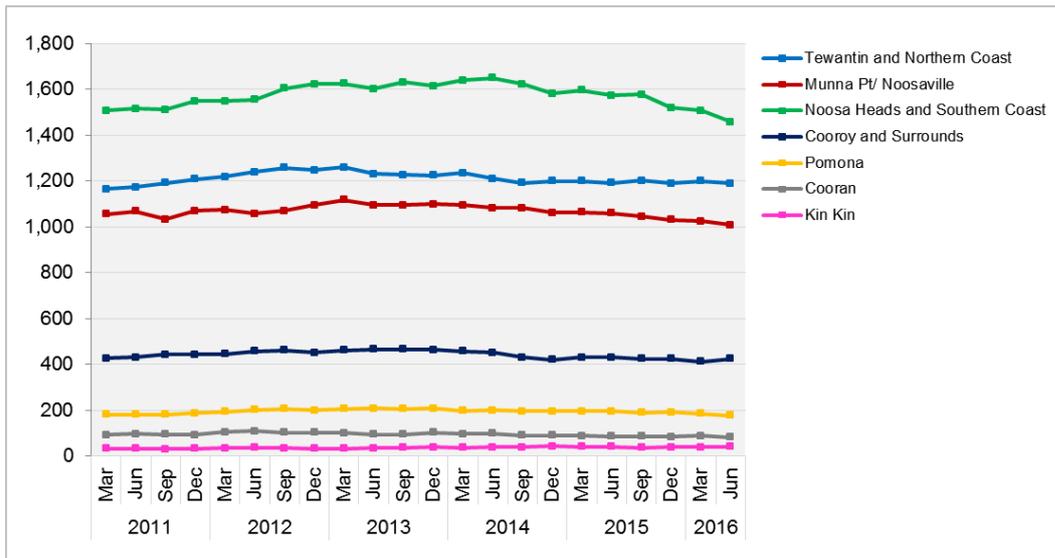
- Tewantin and Northern Coast (postcode 4565) includes Boreen Point, Cootharaba, Noosa North Shore Teewah and Tewantin;
- Munna Point and Noosaville (postcode 4566);
- Noosa Heads and Southern Coast (postcode 4567) includes Noosa Heads, Sunshine Beach, Sunrise Beach and Castaways Beach;
- Cooroy and Surrounds (postcode 4563) includes Black Mountain, Carters Ridge, Cooroy and Tinbeerwah.

Peregian Beach and Marcus Beach have been omitted from this data as they share the 4573 postcode with Coolum Beach and have therefore been added to the Sunshine Coast Council data rather than Noosa Shire's.

The number of total bonds held by the RTA had slowly increased to a peak of around 4,800 bonds in March 2013 (from 4,460 in March 2011), but have generally decreased slowly since that time.



Figure 13. Total Bonds held by RTA, Noosa Localities, 2011-2016

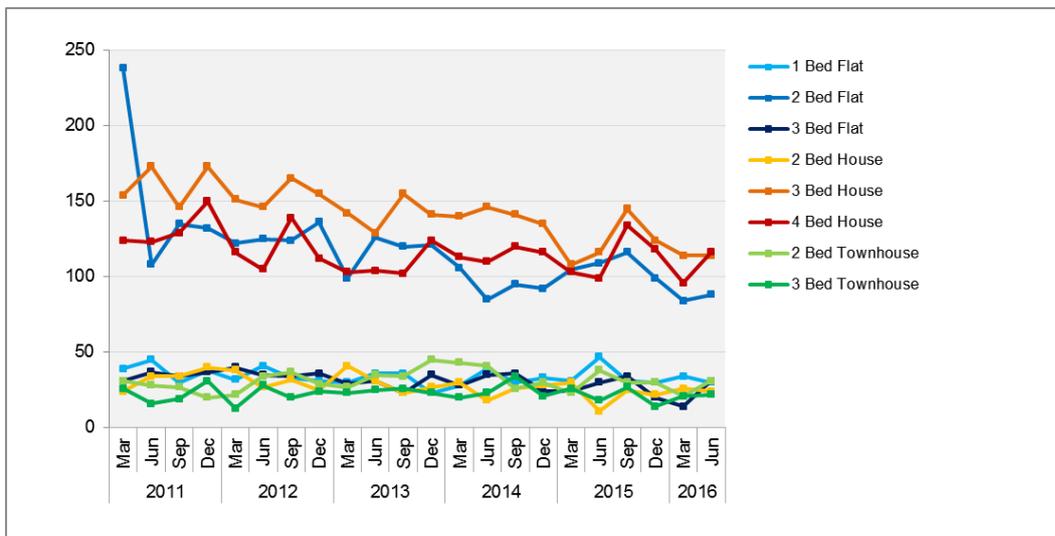


Source: Residential Tenancies Authority 2016;

Showing a similar trend, the numbers of new bonds lodged per quarter have been slowly declining since 2011 for the main dwelling types (**Figure 14**). The number of new bonds lodged per quarter for two bedroom flats, three bedroom houses, and four bedroom houses have slowly declined.

The highest number of rental bonds held in June 2016 were for three bedroom houses, followed by four bedroom houses. Two bedroom flats were the next most frequent type of rental property.

Figure 14. Bonds Lodged with RTA by Dwelling Type, Noosa Shire, 2011-2016



Source: Residential Tenancies Authority 2016;

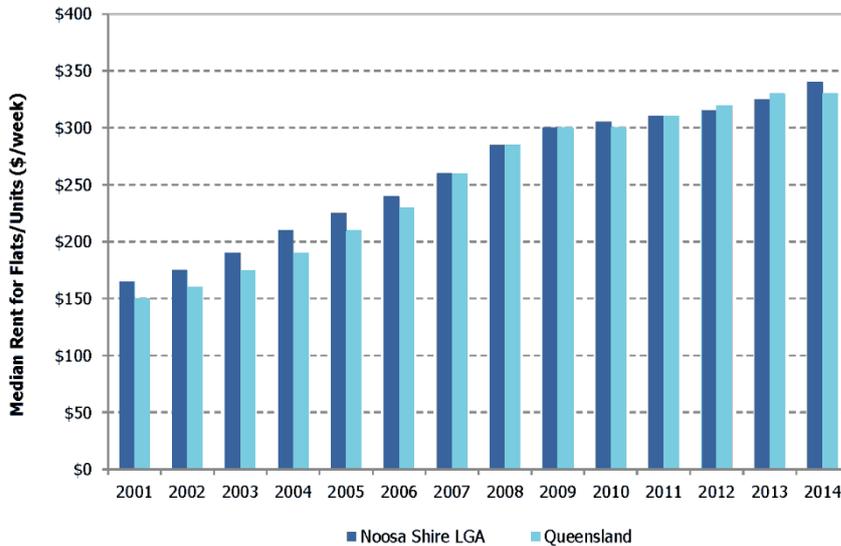
3.1.7 Median Rents by Housing Type

Median rents for flats/ units in Noosa Shire rose by an estimated annual average of 5.7% between 2001 and 2014 (**Figure 15**). This is slightly lower than the State where the median rents for flats/ units was estimated to have grown by 6.3% annually on average over the same period.



Median rents for flats/ units in the Shire generally remained higher than the State between 2001 and 2006. Although from 2007 onwards, the median rent in Noosa Shire has been equal to, or slightly below, that of the State (with the exception of 2014 where median rents were \$340 and \$330 per week respectively).

Figure 15. Median Rents for Flats/Units (two bedrooms), Noosa Shire and Queensland, 2001-2014



Note: Median Rents are for 2 bedroom flats/ units and valued at \$ per week.

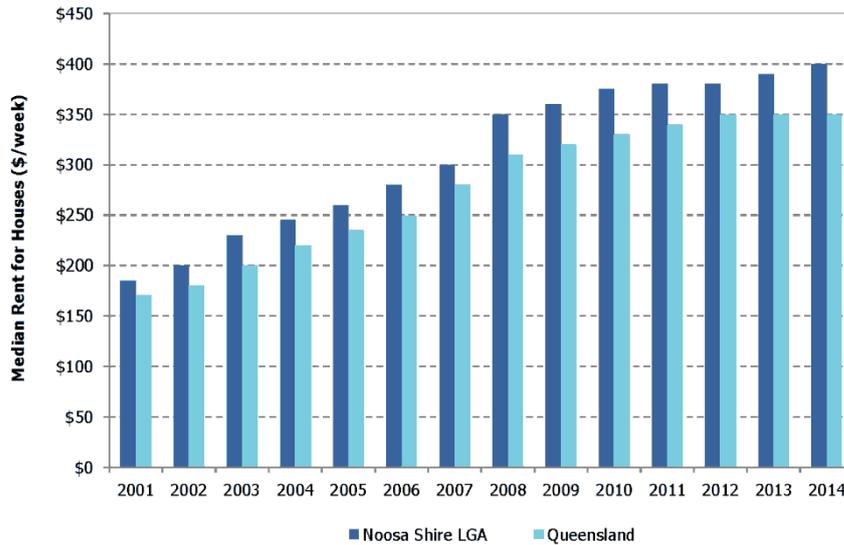
Source: AEC Group 2015;

Median rents for houses in Noosa Shire rose by an estimated annual average of 6.1% between 2001 and 2014 (**Figure 16**). This is slightly higher than the State where the median rents for houses was estimated to have grown by 5.7% annually on average over the same period.

Median rents for houses in the Shire remained higher than the State between 2001 and 2014. In 2014 the median rent for houses in the Shire was \$400 per week compared to \$350 per week for the State. The difference in the median rents for houses between the Shire and the State in 2014 (\$50 per week) was at its highest over the forecast period.



Figure 16. Median Rents for Houses (three bedrooms), Noosa Shire and Queensland, 2001-2014

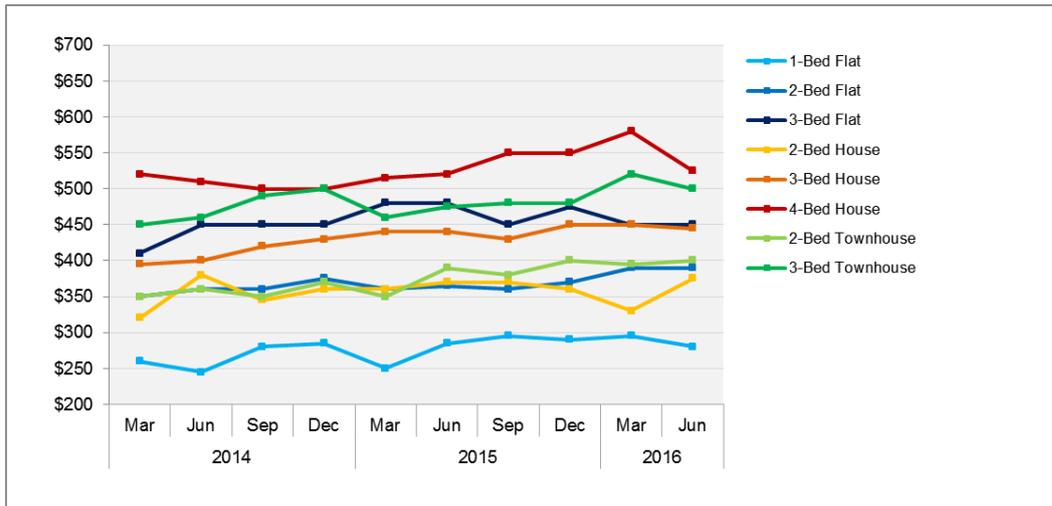


Note: Median Rents are for 3 bedroom houses and valued at \$ per week.

Source: AEC Group 2015;

More recent data from the Residential Tenancies Authority (RTA) (2016) shows that median rents for most dwelling types have continued to trend upwards in the last two and a half years (**Figure 17**).

Figure 17. Median Rents by Dwelling Type, Noosa Shire, 2014-2016



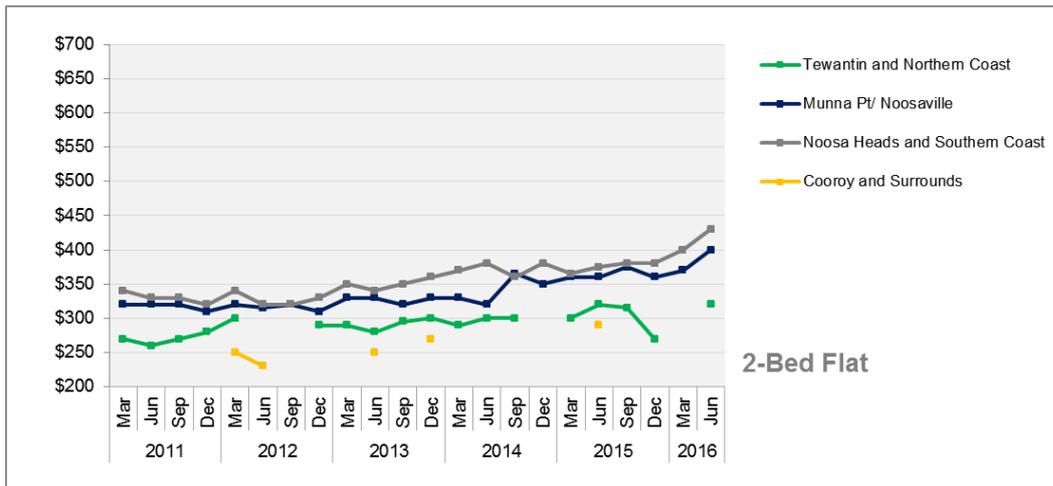
Source: Residential Tenancies Authority 2016;

The most commonly rented dwellings are two bedroom flats, three bedroom houses and four bedroom houses. Median rents by localities for these three dwellings types are presented in the figures below (**Figure 18** to **Figure 20**).

Noosaville (including Munna Point) and Noosa Heads and Southern Coast had the highest median rents for all of the dwelling types.

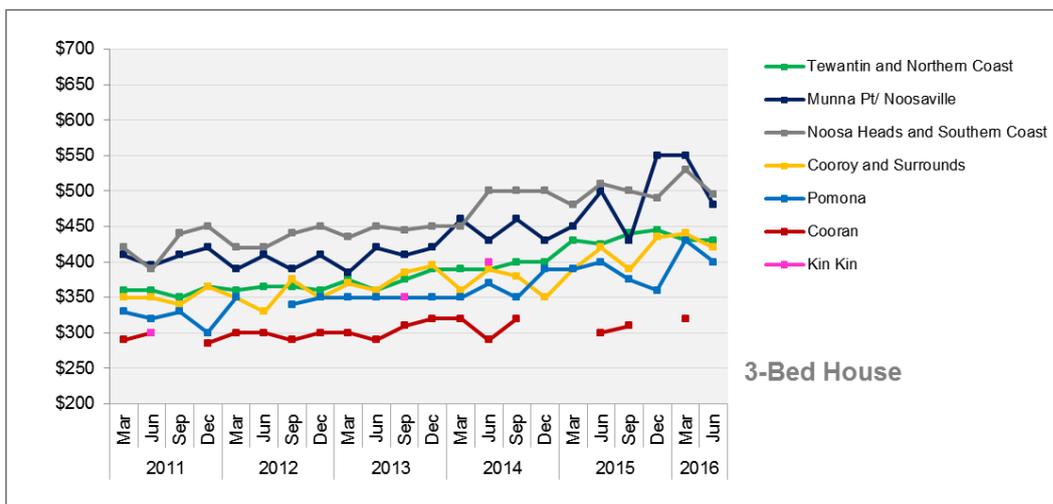


Figure 18. Median Rents by Locality, Two Bedroom Flat, Noosa Shire, 2011-2016



Source: Residential Tenancies Authority 2016;

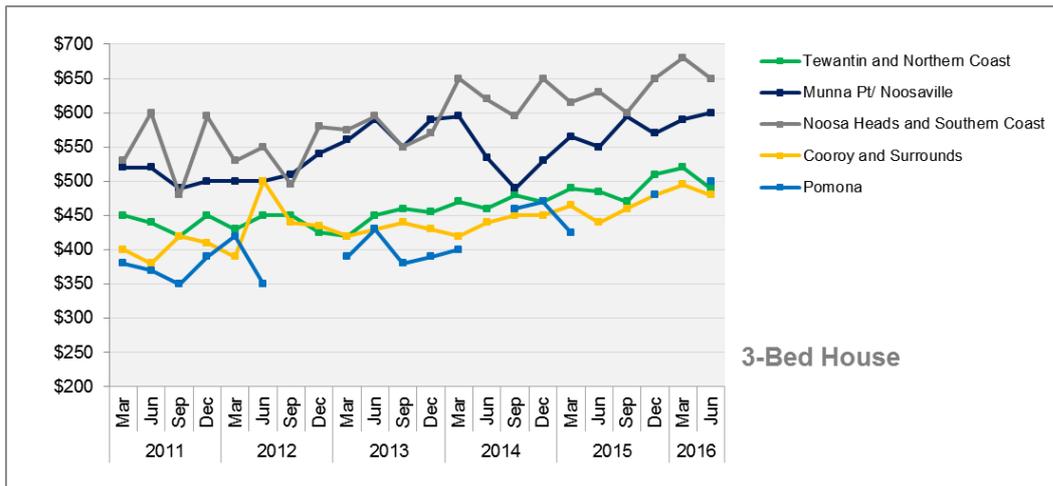
Figure 19. Median Rents by Locality, Three Bedroom House, Noosa Shire, 2011-2016



Source: Residential Tenancies Authority 2016;



Figure 20. Median Rents by Locality, Four Bedroom House, Noosa Shire, 2011-2016

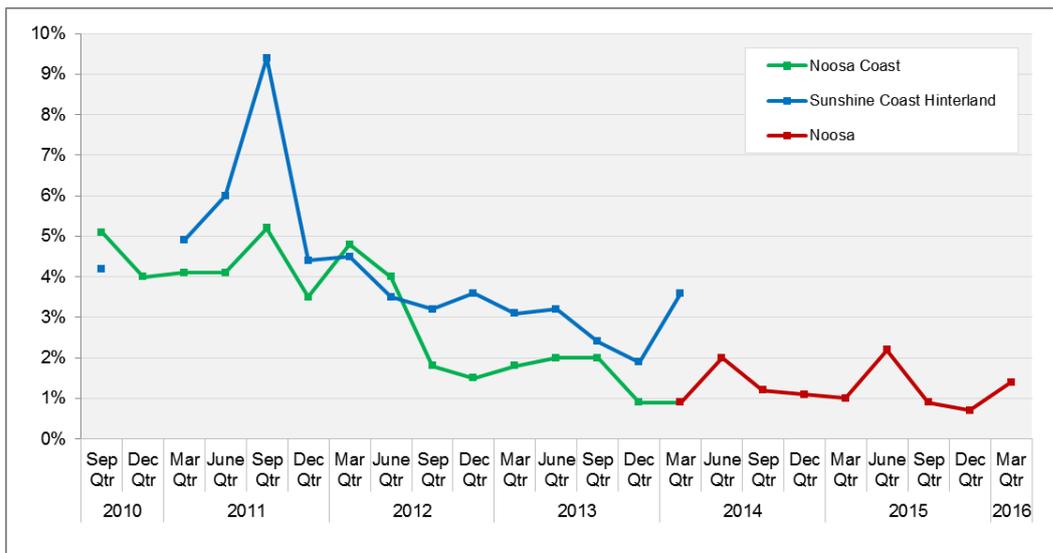


Source: Residential Tenancies Authority 2016;

3.1.8 Rental Vacancy Rates

The Real Estate Institute of Queensland (REIQ) published data on rental vacancy rates. The amalgamation of Noosa Shire to form the Sunshine Coast Regional Council and subsequent de-amalgamation, have impacted the availability of data for rental vacancies. The chart below (**Figure 21**) shows rental vacancy rates for 'Noosa coast' and 'Sunshine Coast hinterland' during the time of amalgamation, and 'Noosa LGA' for the period after de-amalgamation. This data shows a declining trend in vacancy rates over the last five years from around 4-5% in 2010 to around 1-2% since 30 March 2014.

Figure 21. Rental vacancy rate by quarter, Noosa Shire, September 2010 - March 2016



Source: REIQ 2016;

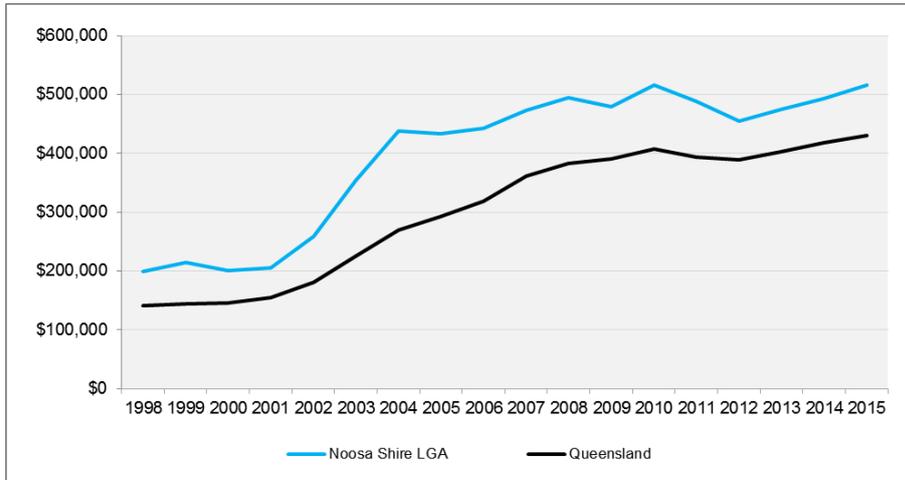
3.1.9 Dwellings Sales Data

The median dwelling sale price in Noosa Shire rose by an estimated annual average rate of 1.8% between 2005 and 2015. This is slightly lower than the State where the median dwelling price was estimated to have grown by 3.9% annually on average over the same period.



The median dwelling sale price in Noosa Shire has remained higher than the State at all times between 1998 and 2015 (**Figure 22**). In 2015, the median dwelling sale price in Noosa Shire was \$516,500 while in the State it was \$430,500.

Figure 22. Median Dwelling Sale Price, Noosa Shire and Queensland, 1998-2015

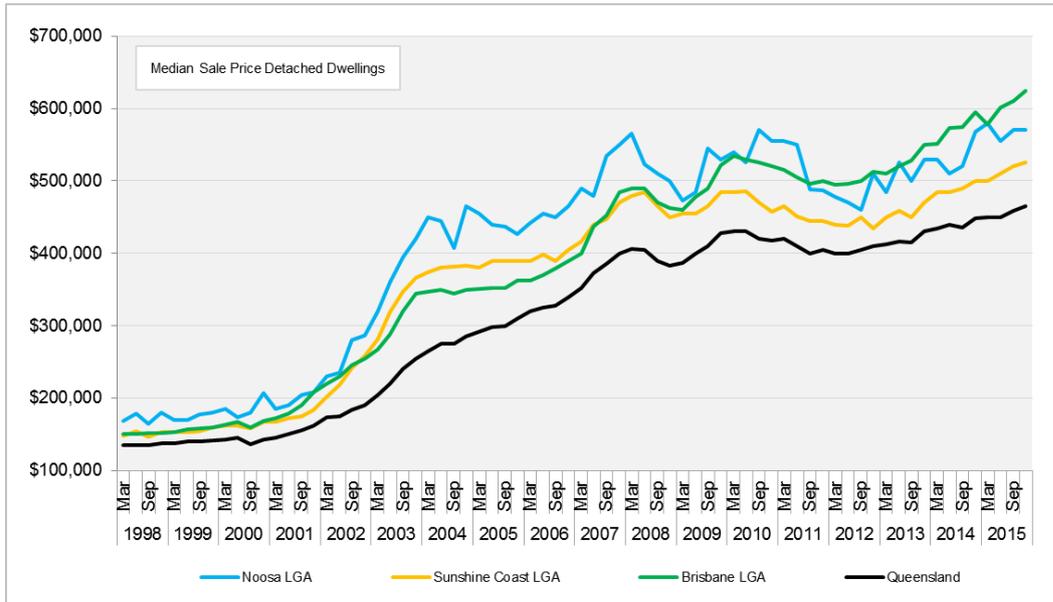


Source: Queensland Government 2016e;

For detached dwellings (houses), median sale prices in Noosa Shire increased sharply between around 2002 and 2008, however since the Global Financial Crisis (GFC) in 2008-2009, the median sale price for detached dwellings has been variable and only for a period in 2010-11 and in 2015 have prices reached a similar level as the peak before the GFC (**Figure 23**). Brisbane prices seem not to have been impacted in the same way with prices now considerably higher than they were just before the GFC. The median sale price of detached dwellings in Noosa Shire has been higher than the median price in the Sunshine Coast LGA since 1998. The number of sales per quarter of detached dwellings has been fairly consistent between 1998 and 2015, with a period of higher sales between 2001 and 03, and a period of lower sales around 2008-2011 (**Figure 24**).

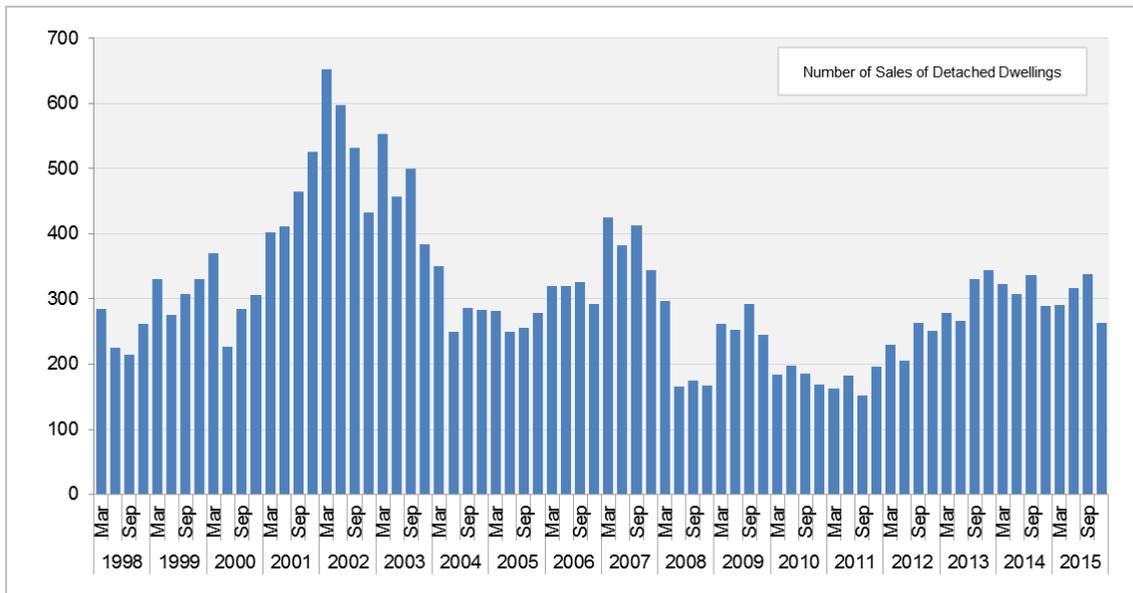


Figure 23. Median Dwelling Sale Price, Detached Dwellings (Houses), Noosa Shire and Comparisons, 1998-2015



Source: Queensland Government 2016e;

Figure 24. Number of Sales, Detached Dwellings (Houses), Noosa Shire, 1998-2015



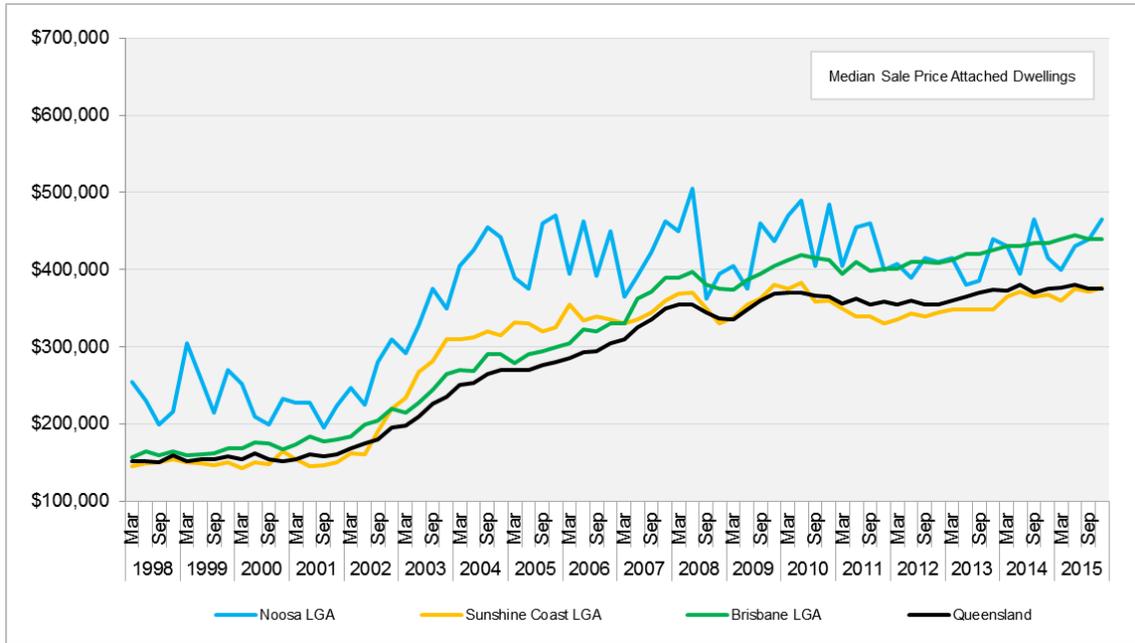
Source: Queensland Government 2016e;

For attached dwellings (including flats, unit, apartments and townhouses and terraces), median sale prices in Noosa Shire increased between 2002 and 2004 from around \$250,000 to around \$450,000 (**Figure 25**). However since 2004, median sale prices have remained around this level with some variability between \$400,000-500,000. The median sale price of attached dwellings in Noosa Shire has been higher than the median price in the Sunshine Coast LGA since 1998. The number of sales of attached dwellings is much lower than for detached dwellings. The number of sales of attached dwellings per quarter was higher than average, between around 2002 and 2003



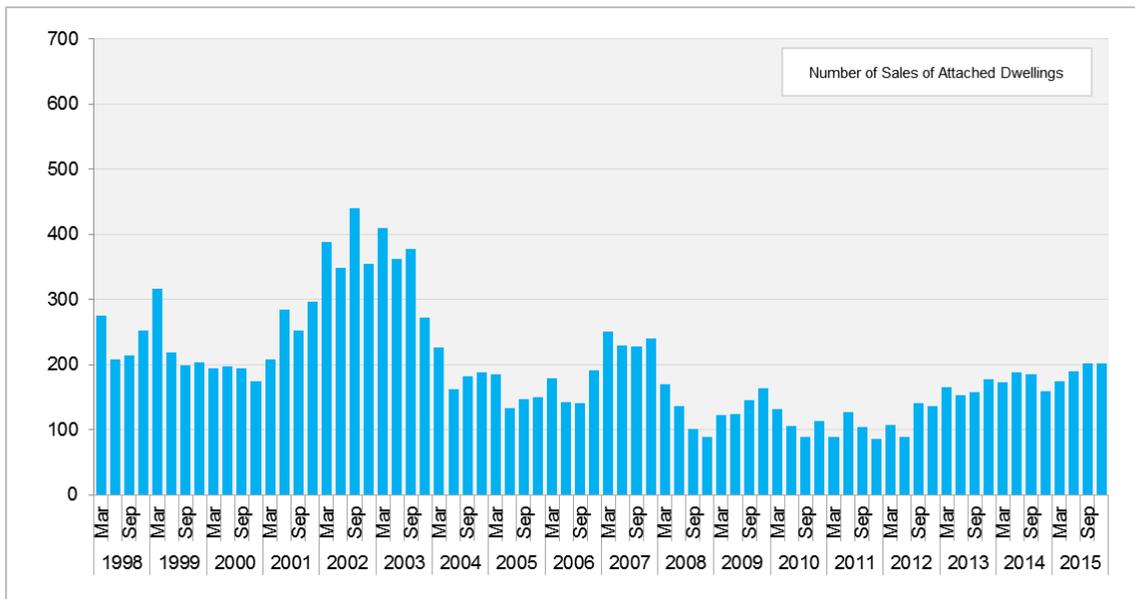
at over 300 dwellings per quarter, but has since reduced to be around 150 dwellings per quarter in recent years (Figure 26).

Figure 25. Median Dwelling Sale Price, Attached Dwellings, Noosa Shire and Comparisons, 1998-2015



Source: Queensland Government 2016e;

Figure 26. Number of Sales, Attached Dwellings, Noosa Shire, 1998-2015



Source: Queensland Government 2016e;

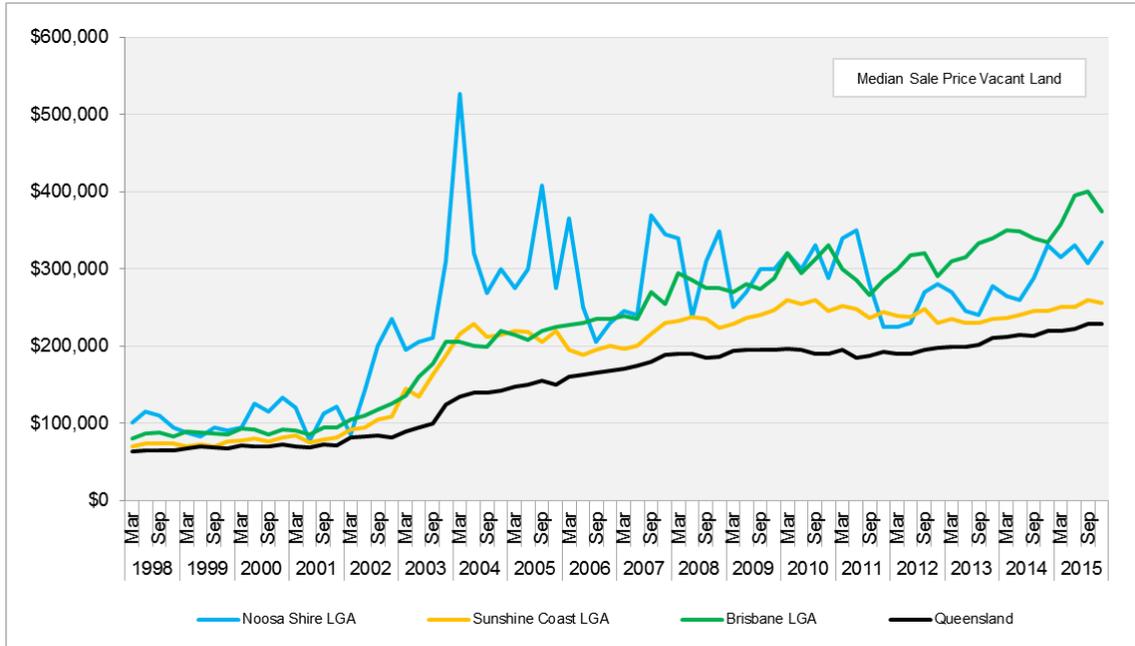
3.1.10 Vacant Land Sales Data

For vacant land, median sale prices have followed a similar pattern to detached and attached dwellings with strong growth between 2002 and 2004, and variable but flat median sale prices since that time (Figure 27). The median sale price of vacant land in Noosa Shire has generally



been higher than the price in the Sunshine Coast LGA, and has only been consistently lower than Brisbane since the end of 2011. There was a significant spike in the price of vacant land in Noosa Shire around 2003-2004 in response to a contraction of supply.

Figure 27. Median Vacant Land Sale Price, Noosa Shire and Comparisons, 1998-2015



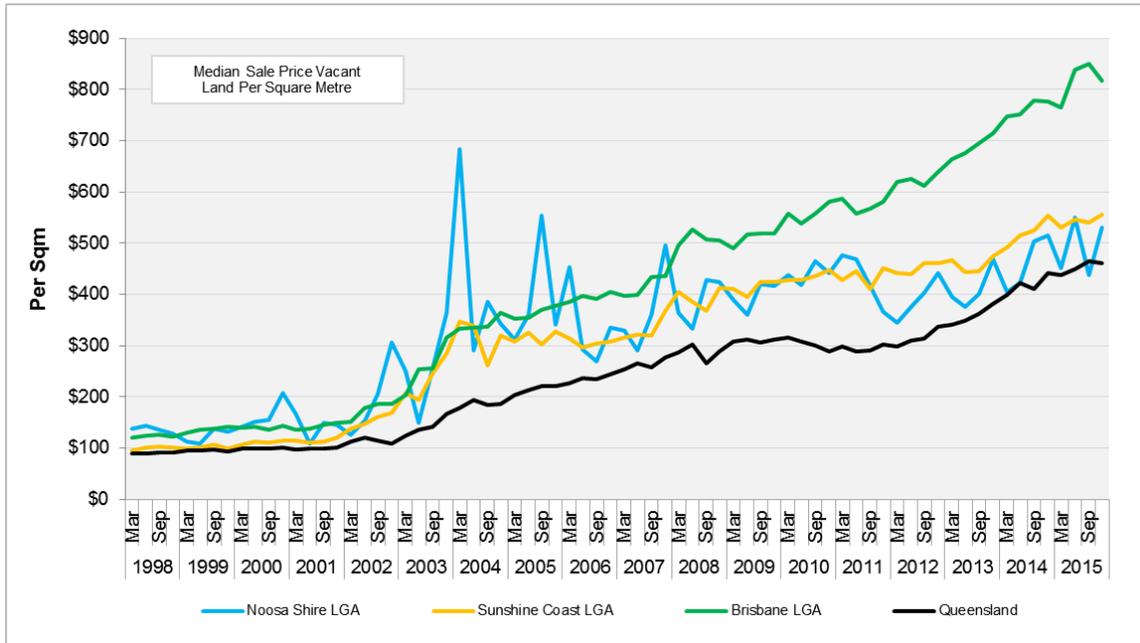
Notes: Median price of vacant urban residential lots, sized 140m² to 2,500m², that were sold in the reporting period based on date of contract.

Source: Queensland Government 2016e;

When the size of the vacant block is considered, the median price per square metre has fallen lower than median prices in the Sunshine Coast LGA since about 2011, and is much lower than for Brisbane LGA (**Figure 28**). This suggests that at least some of the higher median sale prices of vacant land in Noosa Shire are due to larger lot sizes.



Figure 28. Median Vacant Land Sale Price per Square Metre, Noosa Shire and Comparisons, 1998-2015



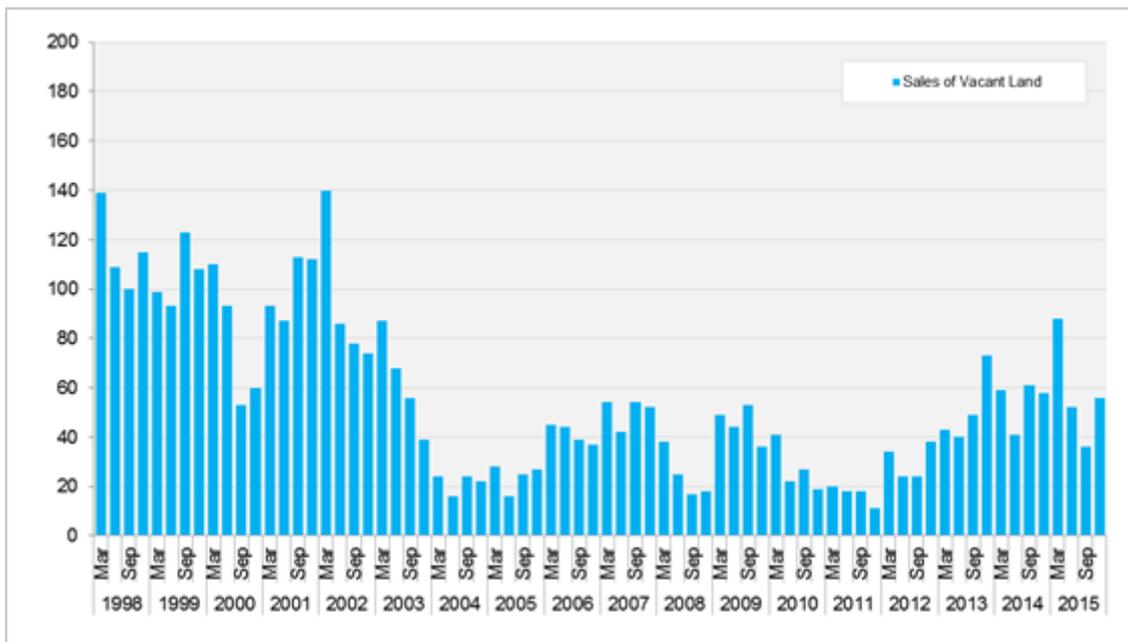
Notes: Median price per square metre of vacant urban residential lots, sized 140m² to 2,500m², that were sold in the reporting period based on date of contract.

Source: Queensland Government 2016e;

The number of sales of vacant land per quarter in Noosa Shire were low between 2004 and 2012 (around 30 per quarter on average) compared to the preceding period (around 70 per quarter). Since 2012, the numbers have been higher at around 40 sales per quarter (**Figure 29**).



Figure 29. Number of Sales of Vacant Land, Noosa Shire, 1998-2015



Notes: Number of vacant urban residential lots, sized 140m² to 2,500m², that were sold in the reporting period based on date of contract.

Source: Queensland Government 2016e;

3.1.11 Housing Characteristics by Localities

Key housing characteristics of each locality were identified to be as follows:

Cooroibah

- Cooroibah had a very high proportion of occupied private dwellings being separate houses (over 99% of all occupied dwellings).
- Of all occupied private dwellings, almost half (48.2%) were being purchased, 34.2% were fully owned and 15.4% were being rented. This was the highest rate of dwellings owned with a mortgage of any of the localities, and the lowest rate of dwellings being rented.
- The median weekly rent in the Cooroibah locality was \$353 and the median monthly mortgage repayment was \$1,850. These medians were amongst the highest in Noosa Shire.

Tewantin

- Tewantin had relatively high proportions of semi-detached and attached dwelling types compared to other localities (17.3%). Of all occupied private dwellings, 79.3% were separate houses, 11.4% were semi-detached and 5.9% were attached.
- Of all occupied private dwellings, 36.5% were fully owned, 27.5% were being purchased with a mortgage and 31.0% were being rented.

Sunshine Beach to Peregian Beach

- The Eastern Beaches locality had higher proportions of semi-detached and attached dwellings types compared to other localities (28.4%). Of all occupied private dwellings, 71.5% were separate houses, 13.3% were semi-detached and 15.0% were attached.



- Of all occupied private dwellings in this locality, 36.3% were being rented, 31.2% were fully owned and 30.5% were being purchased. This was the highest rate of dwellings being rented of any of the localities.
- The median weekly rent in the Sunshine Beach to Peregian Beach locality was \$350 and the median monthly mortgage repayment was \$1,915. These medians were also amongst the highest in Noosa Shire.

Federal to Ringtail Creek, including Pomona and Cooran

- This locality had a high proportion of occupied private dwellings being separate houses (over 95% of dwellings).
- Of all occupied private dwellings, almost half (45.6%) were being purchased, 32.7% were fully owned and 19.5% were being rented. This was one of the highest rates of dwellings owned with a mortgage of any of the localities.

Noosaville and Doonan

- The Noosaville and Doonan locality had high proportions of semi-detached and attached dwellings types compared to other localities (37.5%). This locality had the highest dwelling type diversity of any of the localities. Of all occupied private dwellings, 62.2% were separate houses, 21.8% were semi-detached and 15.6% were attached.
- Of all occupied private dwellings, 37.1% were fully owned, 24.8% were being purchased with a mortgage and 32.4% were being rented.
- The median weekly rent in the Noosaville and Doonan locality was \$358 and the median monthly mortgage repayment was \$2,031. These medians were the highest of any of the localities in Noosa Shire.

Noosa North Shore

- Unoccupied private dwellings represented around 61% of all dwellings in this locality on Census night 2011.
- Noosa North Shore had a high proportion of dwellings classified as 'other dwelling types' at 15.6%. The majority of these dwellings were categorised as improvised home, tents and sleep outs. As noted above, this locality has a small population and total number of dwellings. There were approximately 122 total occupied private dwellings counted on Census night and just 16 dwellings were classified as improvised home, tents and sleep outs. All other occupied dwellings were separate houses.
- Around 46.0% of dwellings in this locality were fully owned, which was the highest rate of home ownership without a mortgage of any of the localities. Around 26.6% of dwellings were being purchased and 18.5% were being rented.

Noosa Heads

- Unoccupied private dwellings represented over 30% of all dwellings in this locality on Census night 2011.
- Noosa Heads had a high proportion of semi-detached and attached dwelling types compared to other localities (26.8%). Of all occupied private dwellings, 72.8% were separate houses, 6.2% were semi-detached and 20.7% were attached. The latter was the highest proportion of units, flats and apartments of any locality.
- Of all occupied private dwellings, 38.2% were fully owned, 24.5% were being purchased with a mortgage and 34.6% were being rented.



- The median weekly rent in the Noosa Heads locality was \$350 and the median monthly mortgage repayment was \$1,820. These medians were amongst the highest in Noosa Shire.

Ridgewood to Tinbeerwah, including Cooroy and Lake Macdonald

- This locality had a high proportion of occupied private dwellings being separate houses (over 90% of dwellings).
- Of all occupied private dwellings, 43.4% were fully owned, 34.6% were being purchased with a mortgage and 19.7% were being rented.

Boreen Point, Kin Kin and Cootharaba

- This locality had a high proportion of occupied private dwellings being separate houses (over 95% of dwellings).
- Of all occupied private dwellings, 41.1% were fully owned, 36.1% were being purchased with a mortgage and 21.7% were being rented.

Summary

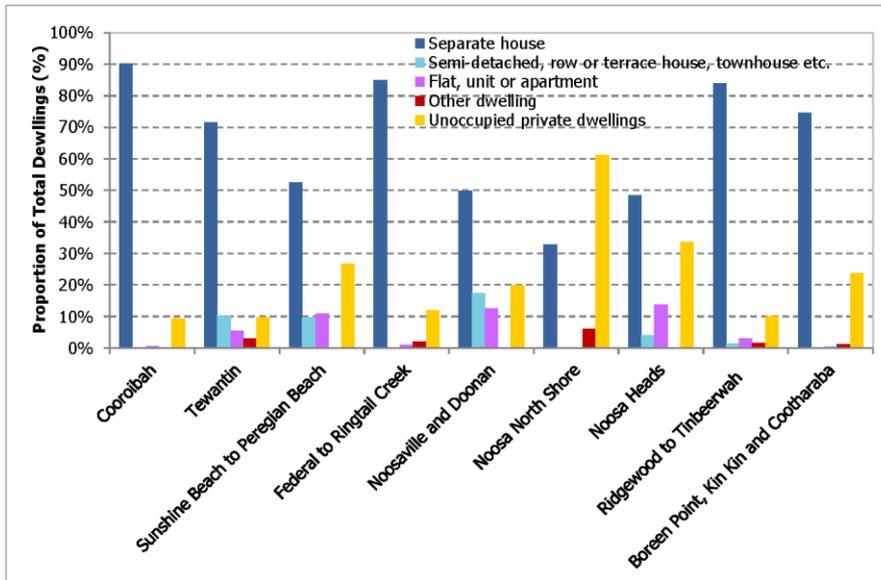
The above demonstrates that there is considerable variation in the key characteristics of housing across localities of Noosa Shire.

Some 60% of dwellings counted in the Noosa North Shire locality were unoccupied on census night in 2011. This was the highest proportion of any of the localities, and was followed by Noosa Heads at 33.6%, Sunshine Beach to Peregian Beach at 26.7%, Boreen Point, Kin Kin and Cootharaba at 23.7%, and Noosaville at 19.9% (**Figure 30**).

When unoccupied dwellings and dwellings only occupied by visitors on census night are excluded, the variations between localities in regard to types of dwellings used by residents can be analysed (**Figure 31**). This shows that the hinterland localities (Cooroibah, Boreen Point, Kin Kin and Cootharaba, Federal to Ringtail Creek, Ridgewood to Tinbeerwah, and Noosa North Shore) had the highest proportions of separate houses, and conversely, the lowest proportions of other dwelling types. Noosaville and Doonan had the highest proportion of other dwelling types, followed by Sunshine Beach to Peregian Beach, Noosa Heads and Tewantin.

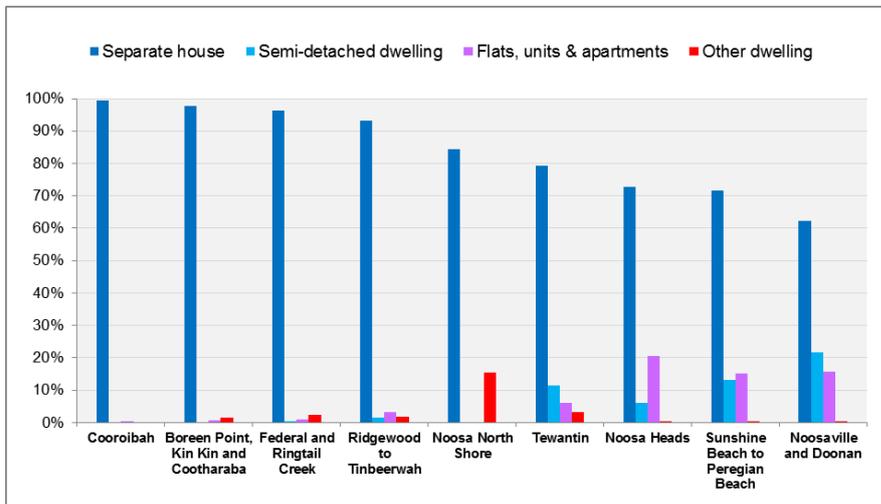


Figure 30. Dwelling type by locality, 2011



Source: AEC Group 2015;

Figure 31. Dwelling type by locality (resident households), 2011



Notes: Excluding unoccupied, and 'visitor only' households

Source: ABS 2011;

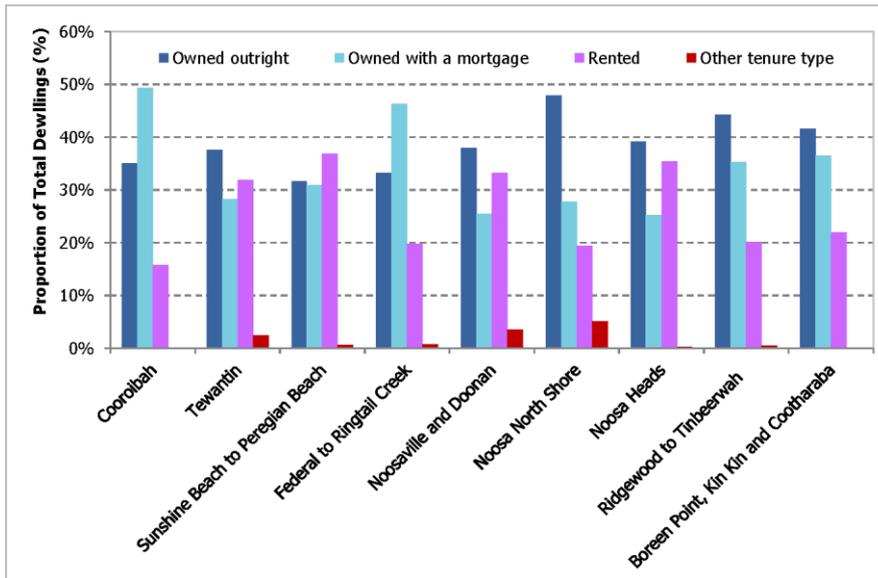
The most common tenure type throughout the Noosa Shire was dwellings that were owned outright (that is without a mortgage). Localities where 'owned outright' was the most prominent tenure type were Noosa North Shore (47.9% of all dwellings), Ridgewood to Tinbeerwah (44.2%) and Boreen Point, Kin Kin and Cootharaba (41.6%).

Dwellings being purchased through a mortgage was the most common tenure type in Cooroibah, where 'owned with a mortgage' accounted for 49.3% of all dwellings, and Federal to Ringtail Creek, where 'owned with a mortgage' accounted for 46.3% of all dwellings.

There were high proportions of households renting in the Sunshine Beach to Peregian Beach locality (36.8%), Noosa Heads (35.4%), Noosaville and Doonan locality (33.2%) and Tewantin (31.0%).



Figure 32. Dwelling tenure by locality, 2011



Source: AEC Group 2015;

3.2 Social Housing Characteristics

The provision of social housing is the responsibility of the Queensland Government. Social housing comprises public housing and community housing. Public housing is funded and managed by the State Government; and community housing is funded by either the Australian or the State Government and managed by the not-for-profit sector.

In recent years there have been a small number of larger, commercially sophisticated not-for-profit providers operating alongside the existing State and Territory-run housing authorities to provide 'affordable housing developments'. Organisations such as 'housing companies' utilise financial measures such as working with banks, developers and other commercial partners to leverage finance and construct more dwellings than they would have been able to do through government grants alone. Some developments include retail or commercial spaces, which increase the diversity and viability of the development, enhance street activation and provide positive opportunities to partner with business and community organizations.

3.2.1 Public Housing

Provision

Data provided by the Department of Housing and Public Works (Queensland Government 2016f) shows that there were 383 available public housing dwellings for rental in Noosa Shire in 2015 (**Table 9**).

The majority of these were located in the Tewantin and Northern Coast area with 194 dwellings located in those areas. A further 92 dwellings were located in Noosa Heads and Southern Coast, 54 in Cooroy and Surrounds, and 33 in Munna Point and Noosaville. Public housing provided in Noosa Shire was primarily general stock with 307 dwellings being general stock, compared with 75 dwellings for senior accommodation and just 1 dwelling part of the Aboriginal and Torres Strait Islander housing rental program.



Table 9. Public Housing by Program, By Postcode and Suburb, Noosa Shire, 2015

Postcode and Suburb	Public rental housing program		ATSI housing rental program - General stock	Total
	General stock	Senior accommodation		
4563 Cooroy and Surrounds	48	6	0	54
4565 Tewantin and Northern Coast	144	49	1	194
4566 Munna Pt/ Noosaville	25	8	0	33
4567 Noosa Heads and Southern Coast	80	12	0	92
4569 Cooran	5	0	0	5
4573 Marcus Beach/Peregian Beach	5	0	0	5
Total	307	75	1	383

Source: Noosa Shire Council 2016a (Department of Communities Data);

Of the 383 public housing rental dwellings, 131 dwellings had 1 bedroom (34%), 71 dwellings had two bedrooms (19%), 143 dwellings had three bedrooms (37%), 33 dwellings had four bedrooms (9%), and 5 dwellings had five bedrooms (1%) (**Table 10**). In comparison, 196 households in public housing dwellings were lone person households (51%), 100 households had 2 occupants (26%), and 42 households had 3 occupants (11%). In the table below, cells have been highlighted to show where there is some mismatch in dwelling size and household size (with blue suggesting some potential mismatch and grey suggesting a higher potential mismatch).

Table 10. Public Housing by Number of Bedrooms and Number of Occupants, Noosa Shire, 2015

Number of Occupants	Number of Bedrooms					Total
	1	2	3	4	5	
1 Occupant	126	33	36	1		196 (51%)
2 Occupants	5	33	56	6		100 (26%)
3 Occupants		5	30	7		42 (11%)
4 Occupants			9	6		15 (4%)
5 Occupants			5	4		9 (2%)
6 Occupants			3	1		4 (1%)
7 Occupants				2		2 (1%)
9 Occupants				1		1 (0%)
Not Available			4	5	5	14 (4%)
Total	131 (34%)	71 (19%)	143 (37%)	33 (9%)	5 (1%)	383 (100%)

Source: Noosa Shire Council 2016a (Department of Communities Data);



Around 50% of households living in public housing in Noosa Shire in 2015 were lone person households, and around 25% are single parent households (**Table 11**). Around 54% of all households had a member of the household with a disability.

Table 11. Characteristics of Households in Public Housing, Noosa Shire, 2015

Household Type	Total Households	ATSI Households	Households with any member having a disability	Main language of household not English
Single Person <55 years	58	4	46	1
Single Person Over 55	138	0	72	4
Sub-Total - Single	196 (51%)	4	118	5
Couple Only <55 years	2	0	1	0
Couple Only Over 55	25	0	15	0
Sub-Total – Couple Only	27 (7%)	0	16	0
Couple, 1 Child	11	1	4	0
Couple, 2 Children	4	0	3	0
Couple, >2 Children	9	1	4	0
Sub-Total – Couple with Children	24 (6%)	2	11	0
Single Parent, 1 Child	57	1	29	1
Single Parent, 2 Children	25	2	10	1
Single Parent, >2 Children	14	2	4	0
Sub-Total – Single Parent	96 (25%)	5	43	2
<i>Not Available</i>	14	0	0	0
<i>Other</i>	26	2	19	0
Total	383 (100%)	13 (3%)	207 (54%)	7 (2%)

Note: The rows in this table do not sum. Percentages are of total households (n=383)

Source: Noosa Shire Council 2016a (Department of Communities Data);

Only 13 of the households living in public housing were identified as being within a homelessness category at the time public housing was allocated (3%) (**Table 12**). However, for a high number of households, data on homelessness at the time of allocation was unspecified or unavailable. It is unclear whether data that is unavailable for privacy reasons is likely to include people who were homeless or at tenuous tenure arrangements.



Table 12. Homelessness Category for Households in Public Housing (at time of allocation), By Locality, Noosa Shire, 2015

Postcode and Suburbs	Homeless Category			Unavailable	Unspecified	Total
	A	B	C			
4563 Cooroy and Surrounds	1			1	52	54
4565 Tewantin and Northern Coast	3	3	1	3	184	194
4566 Munna Pt/ Noosaville	2			2	29	33
4567 Noosa Heads and Southern Coast			1	3	88	92
4569 Cooran				5		5
4573 Marcus Beach/Peregian Beach	2				3	5
Total	8	3	2	14	356	383

Notes: A = Homeless Category A; B = Homeless Category B; C = Homeless Category C; Unavailable = data unavailable for reasons of confidentiality.

Category A is PRIMARY HOMELESSNESS

People without conventional accommodation such as people living on the streets, sleeping in derelict buildings, or using cars for temporary shelter.

Category B is SECONDARY HOMELESSNESS

People who move frequently from one form of temporary shelter to another. This category covers people accommodated in homeless services, people residing temporarily with family and friends and those using rooming/boarding houses on an occasional basis.

Category C is TERTIARY HOMELESSNESS

People who live in boarding/rooming houses on a medium to long term basis. This type of accommodation typically does not have self-contained rooms and residents share bathroom and kitchen facilities. Rooming house residents do not have the security of tenure provided by a lease.

Source: Noosa Shire Council 2016a (Department of Communities Data)

Almost 50% of households residing in public housing had started their tenancy in the preceding 10 year period of 2006-2015, and a further 37% of households had started their tenancy in the period of 1996-2005 (**Table 13**).

Table 13. Tenancy Start Date, Public Housing, Noosa Shire, 2015

Tenancy Start Date	Total Households	Households with any member having a disability
1976-1985	2	1
1986-1995	49	18
1996-2005	144	59
2006-2015	188	129
Total	383	207

Source: Noosa Shire Council 2016a (Department of Communities Data);



Social Housing Register

There were 138 households on the waiting list. Just over 60% of these households would be entitled to a one bedroom dwelling, 22% to a two bedroom dwelling, 12% to a three bedroom dwelling and 5% to a four bedroom dwelling (**Table 14**).

Table 14. Bedroom Entitlement for Households on Social Housing Register, By Preferred Location, Noosa Shire, 2015

Location	Bedroom Entitlement				Total
	1	2	3	4	
CRYA Cooran, Cooroy	20	14	3	5	42
NHSA Noosa Heads, Noosaville	36	7	6	1	50
SHBA Sunrise Beach, Sunshine Beach	3	4	2	0	9
TEWA Tewantin	25	5	6	1	37
Total	84	30	17	7	138

Notes: Location refers to the preferred location of public housing.

Source: Noosa Shire Council 2016a (Department of Communities Data);

Almost 60% of households were lone person households, and 28% were one parent families (**Table 15**). Of all the households on the waiting list, 80% were households where a member of the family has a disability.



Table 15. Characteristics of Households on Social Housing Register, Noosa Shire, 2015

Household Type	Total Households	ATSI Households	Households with any member having a disability	Main language of household not English
Single Person <55 years	35	2	28	0
Single Person Over 55	47	0	42	1
Sub-Total - Single	82 (59%)	2	70	1
Couple Only <55 years	4	0	4	0
Couple Only Over 55	6	0	6	0
Sub-Total – Couple Only	10 (7%)	0	10	0
Couple, 1 Child	2	1	2	0
Couple, 2 Children	1	0	2	0
Couple, >2 Children	3	0	1	0
Sub-Total – Couple with Children	6 (4%)	1	5	0
Single Parent, 1 Child	20	2	15	1
Single Parent, 2 Children	10	1	5	0
Single Parent, >2 Children	9	3	3	0
Sub-Total – Single Parent	39 (28%)	6	23	1
<i>Not Available</i>	0	0	0	0
<i>Other</i>	1	0	1	0
Total	138	9 (7%)	110 (80%)	2 (1%)

Note: The rows in this table do not sum. Percentages are of total households (n=138)

Source: Noosa Shire Council 2016a (Department of Communities Data);

Around 50 households on the register were categorised as within homelessness category A, B or C, making up 38% of total households on the waiting list.



Table 16. Homelessness Category for Households on Social Housing Register, By Location, Noosa Shire, 2015

Location	Homeless Category			Unspecified	Total
	A	B	C		
CRYA Cooran, Cooroy	5	3	7	27	42
NHSA Noosa Heads, Noosaville	5	2	15	28	50
SHBA Sunrise Beach, Sunshine Beach	2	0	0	7	9
TEWA Tewantin	3	1	9	24	37
Total	15	6	31	86	138

Notes: Location refers to the preferred location of public housing. A = Homeless Category A; B = Homeless Category B; C = Homeless Category C; As defined in notes to Table 12.

Source: Noosa Shire Council 2016a (Department of Communities Data)

Of the 138 households waiting for public housing, 1 household had been waiting since 1999 (1%), 7 households since between 2000-2004 (5%), 19 households since between 2005-2009 (14%), 86 households since between 2010-2014 (62%), and 25 households had joined the waiting list in 2015 (up to September 2015) (18%) (Table 14). The table shows that there can be long waits for public housing.

Table 17. Year of Application for Households on Social Housing Register, By Location, Noosa Shire, 2015

Location	Year of Application									Total
	1995-1999	2000-2004	2005-2009	2010	2011	2012	2013	2014	2015	
CRYA Cooran, Cooroy	1	0	4	1	2	0	5	16	13	42
NHSA Noosa Heads, Noosaville	0	3	9	0	6	6	10	11	5	50
SHBA Sunrise Beach, Sunshine Beach	0	1	1	0	0	3	0	2	2	9
TEWA Tewantin	0	3	5	1	5	4	6	8	5	37
Total	1	7	19	2	13	13	21	37	25	138

Notes: Location refers to the preferred location of public housing.

Source: Noosa Shire Council 2016a (Department of Communities Data);

3.2.2 Community Housing, Transitional Housing, and Emergency Housing

At 30 June 2016, the Queensland Department of Housing and Public Works identified 21 community housing tenancies in Noosa Shire (Queensland Government 2016f). Consultation with various service providers identified a limited stock of transitional and emergency housing.



Table 18. Housing and Service Providers, Noosa Shire, 2016

Name	Description	Housing/Services
<p>Coast2Bay Housing Group, Offices in Nambour and Caboolture.</p>	<p>Coast2Bay provides a professional and integrated community housing service that is responsive to the community and to tenants' needs. Coast2Bay manages approximately 450 dwellings within the north coast region, including Sunshine Coast, Noosa, Moreton Bay and Gympie Local Government Areas. It is a registered provider under the National Regulatory System for Community Housing, which came into effect in Queensland on 1 January 2014.</p> <p>Coast2Bay Housing Group is a professional and socially responsible community housing company working in partnership with communities, governments and the private sector. It delivers appropriate social and affordable housing programs that support and empower people to improve their lives, progress to independence and contribute to sustainable communities.</p> <p>In delivering its mission, Coast2Bay seeks to contribute to economic development and social inclusion through:</p> <ul style="list-style-type: none"> • The management of an available housing portfolio in a cost efficient way; • Effective tenancy management that sustains clients in their housing for the duration of need; • The matching of tenant needs, where necessary, to appropriate support services; • The development of additional community and affordable housing. <p>It provides guaranteed rent to a property owner for 52 weeks per year, paid monthly in advance, to rent their property, and also undertakes some projects under the National Rental Affordability Scheme (NRAS) to invest in rental housing. The motivation behind new development projects is simply to obtain housing for disadvantaged people within the community. Coast2Bay is keen to seek new development opportunities to assist with the provision of community, affordable and specialist housing within</p>	<p>In Noosa Shire Coast2Bay provides:</p> <ul style="list-style-type: none"> • Community housing – Coast2Bay manage 8 dwellings owned by them (including one 6 bedroom housing for disabled clients requiring full time care). These are located in Tewantin and Noosaville. • Transitional housing – 14 (these properties are head-leased from the private rental market under the Queensland Government Community Rent Scheme Program). Properties are located in Cooroy, Noosaville, Noosa Heads, Sunrise Beach and Tewantin.



Name	Description	Housing/Services
	<p>the Sunshine Coast and Moreton Bay regions.</p> <p>C2B have a number of Housing Assistance Programs, including:</p> <ul style="list-style-type: none"> • Long Term Housing • Transitional Programs • Community Rent Scheme • Community Managed Studio Units • National Rental Affordability Scheme 	
<p>Salvation Army Crisis Noosa Accommodation Service, Tewantin Office.</p>	<p>Provides safe, affordable and supported accommodation for 12 weeks to single females and families who are homeless or at imminent risk of being homeless and provides, information, support and referral to enable clients to obtain independent housing.</p> <p>Can accommodate single females in situations of domestic & family violence, the only people they cannot house are single males. They also provide emergency relief for vulnerable groups. The target group is families , and the aim is to assist those facing rent or mortgage stress to maintain their housing. The Salvation Army also offers financial counselling.</p>	<p>The target group is families experiencing homelessness (e.g. sleeping in cars or a lounge) – can include a male and children or female and children alone (not singles).</p> <p>The SHINE program provides 3 x two bedroom dwellings for crisis accommodation and support and referral services for women and children affected by violence in the home.</p> <p>Total available properties under Specialist Homelessness Services are:</p> <ul style="list-style-type: none"> • 10 dwellings (some outside Noosa Shire): <ul style="list-style-type: none"> ○ 5 headleased on the private rental market. ○ 5 Department of Housing and Public Works (DHPW) properties.
<p>United Synergies, Tewantin Office.</p>	<p>Offer supported accommodation for homeless and disadvantaged young people aged 16-25 years; an alternative education program; youth support programs; assistance to younger parents to attain positive parenting and relationship skills; suicide prevention and bereavement support; mentoring programs; work experience programs; counselling and referral and consulting and training to the human services sector.</p>	<p>The Specialist Homelessness Service supports young people at risk of homelessness across the Sunshine Coast region, providing short term accommodation for up to 3 months. Other accommodation services offered by United Synergies are for referrals by Child Safety.</p>
<p>St Vincent de Paul, Tewantin Office.</p>	<p>St Vincent de Paul sees its service as part of an integrated support approach within the Noosa District and works with other agencies such as Salvation Army, Red Cross and Council, and participates in the</p>	<p>Locally St Vincent de Paul respond to the needs of people on the margins or who fall through the cracks of social support mechanisms provided by the government. They provide for a mixture</p>



Name	Description	Housing/Services
	various community initiatives to raise awareness for homelessness and child safety issues.	of sometimes complex needs, including providing swags to sourcing supported accommodation.

Source: Noosa Shire Council 2016a (Survey Results); Consultation undertaken by Briggs & Mortar Pty Ltd.

3.2.3 Private Market Assistance

The Federal and Queensland governments also provide assistance to households to maintain their accommodation in the private rental market, rather than require public housing. This assistance includes the following programs:

- The National Rental Affordability Scheme (NRAS) is a partnership between the Australian Government and the States and Territories of Australia to invest in affordable rental housing for low and moderate income individuals and families. Through the NRAS scheme a tax free incentive for a period of 10 years is provided to investors buying a NRAS property. This incentive is made available to investors each year in return for entering into a NRAS agreement that offers discounted rents to eligible tenants. In order to receive the yearly incentive, the discounted rent offered must be at least 20% less than the market rent for the area and the tenants must meet income eligibility criteria. In many cases Affordable Housing is developed by a not for profit organisation such as a housing company. There were just 16 NRAS dwellings in Noosa Shire at 30 June 2016 (see **Table 19**).
- RentConnect services help households to find and apply for rental housing. Households may be having trouble finding appropriate housing, have no identification documents or no rental history, or are trying to prove that they will be a good tenant. RentConnect is a service provided by the Queensland Department of Housing and Public Works. 57 households received assistance to help find and apply for a place to rent in the 12 months to 30 June 2016 in Noosa Shire.
- The Department of Housing and Public Works also provides bond loans to eligible households to assist them move into private rental accommodation. The bond loan is an interest free loan and can be provided to households that have less than \$2,500 in cash, and choose a property where the rent is less than 60% of their total gross household weekly income. In the 12 months to 30 June 2016, 84 bond loans were made to households in Noosa Shire.
- The Rental Grant program helps clients who are exiting a hospital or health facility, correctional facility, other approved centre, Child Protection Service, Community Rent Scheme property or who are fleeing domestic/family violence or who are homeless or at risk of homelessness to move into private rental accommodation. A total of 17 rental grants were made to households in Noosa Shire in the 12 months to 30 June 2016.
- The Home Assist Secure service aims to remove some of the practical housing-related difficulties experienced by people 60 years and over and people of any age with a disability, who wish to remain living in their home (includes homeowners). 541 households were assisted through the Home Assist Secure program in the 12 months to 30 June 2016, however the location of these services are recorded based on the location of the service office, rather than the location where the assistance was provided. It could be assumed that the majority of these services were provided to households within the LGA.



Table 19. Private market housing assistance by category of assistance, Noosa Shire, 12 months to 30 June 2016

Area	NRAS	Rent Connect	Bond Loans	Rental Grants	Home Assist Secure (a)
Noosa Shire	16	57	84	17	541

Notes: NRAS dwellings are as at 30 June 2016; RentConnect, Bond Loan and Rental Grant services are for the 12 months to end of the latest quarter; Home Assist Secure is for the financial year to the current quarter. a = Home assist secure services are recorded at the location of the service office, not the location where the assistance was provided.

Source: Queensland Government 2016f;

3.3 Other Housing

Accommodation in caravans, camping grounds and other temporary housing provides accommodation of insecure tenure.

Caravan parks are not permitted permanent residents, however some may provide options on a short term basis. Those in Noosa Shire are shown below. There are also camping and caravanning options in the hinterland of Noosa Shire and the Sunshine Coast which may be used. Noosa Shire additionally has three Backpacker Lodges, although these are understood to be heavily used by backpackers.



Table 20. Caravan, Camping and Temporary Accommodation, Noosa Shire

Name	Address	Housing/Services
Boreen Point Caravan & Camping Grounds	1 The Esplanade BOREEN POINT QLD 4565	Unable to provide long-term accommodation.
Cooroy Motel, Caravan Park	30/34 Elm Street COOROY QLD 4563	Longer stays may be negotiated with management. A waiting list is kept.
Noosa North Shore Beach Campground	240 Wilderness Track, Maximillian Road, NORTH SHORE QLD 4565	Unable to provide long-term accommodation.
Noosa River Holiday Park	4 Russell Street, NOOSAVILLE QLD 4566	Unable to provide long-term accommodation and heavily booked by tourists.
BIG4 Noosa Bougainvillea Holiday Park	141 Cooroy Noosa Road, TEWANTIN QLD, 4565	Unable to provide long-term accommodation.
Pomona Showground Camping Area	15 Pavilion St, POMONA QLD 4568	Permanent accommodation allowed.
Johns Landing Camping Ground - Lake Cooroibah,	Johns Rd, LAKE COOROIBAH, QLD 4565	Permanent accommodation allowed. Currently 30 permanent residents and 20 casuals living on site. There are approximately 10-15 children and 20 seniors.
The Royal Mail Hotel, Tewantin	120 Poinciana Ave, TEWANTIN QLD 4565	Unable to provide long-term accommodation but may provide emergency accommodation depending on case. Utilised by tourists.

Source: Coast2Bay Housing Group 2015; Noosa Shire Council 2016a (Survey Results); Local knowledge of Council Officers, Consultation undertaken by Briggs & Mortar Pty Ltd.

There is also a caravan park at Woombye owned by Sundale which provides long term accommodation, an example of a response being made in the sector elsewhere on the Sunshine Coast which may be used by Noosa Shire residents.



4. ASSESSMENT OF HOUSING NEEDS

4.1 Housing Needs for Specific Groups

4.1.1 Aged Persons' Accommodation

Residential Aged Care and Home Care

Provision

The Australian Government provides accreditation and funding to aged care providers in Australia. Government funding is made available only to approved providers for allocated places and the allocation of new places is undertaken every 18 months or so (at least since 2008) after a needs based analysis of aged care provision throughout the country. The analysis has three main branches:

- Ensuring that the number of aged care places matches growth in the aged population using a national provision ratio of:
 - 125 residential and home care places for every 1,000 people aged 70 years of age and over by 2021-22 (consisting of 80 places in a residential setting and 45 places in a home care setting);
- Balancing provision in metropolitan, regional, rural and remote areas;
- Considering people with special needs including:
 - People from Aboriginal and Torres Strait Islander communities;
 - People from culturally and linguistically diverse backgrounds;
 - People who live in rural or remote areas;
 - People who are financially or socially disadvantaged;
 - Veterans;
 - People who are homeless or at risk of becoming homeless;
 - Care-leavers⁶;
 - Parents separated from their children by forced adoption or removal;
 - Lesbian, gay, bisexual, transgender and intersex people;
 - People of a kind (if any) specified in the Allocation Principles. (Australian Government 2016a).

The aged care sector in Australia has adjusted to reforms which have been taking place over the last 10 years or so. Broadly, the reforms were designed to respond to the changing preferences of older people and to help the system respond to Australia's ageing population. Some of these preferences, expectations and trends were noted in a Productivity Commission report into Australia's aged care system released in 2011, including:

- There is an increasing preference for independent living and choice in aged care services. Older people told the Commission they wanted to be independent for as long as possible and able to choose where they live, which providers they use, how services are delivered and able to purchase additional services or live in higher standards of accommodation.

⁶ Care-leavers are adults who spent time in care as children – including foster care, residential care or other arrangement – and are also referred to as 'forgotten Australians', 'former child migrants' and 'stolen generations'. This group can have particular anxiety around aged care given previous experience with institutional care.



The Commission noted that there is evidence that choice also improves wellbeing (life satisfaction, life expectancy, independence and continuity of care), and choice encourages competition, efficiency, innovation and higher quality.

- There are greater levels of affluence in older people than has previously been the case, and therefore people requiring care have a wider range of assets and incomes.
- Older people have increasing expectations of care, including expectations of culturally relevant care (for culturally and linguistically diverse, sexually diverse and Aboriginal and Torres Strait Islander communities).
- Although family members, friends and neighbours continue to provide most of the care for older people, as the population ages and due to other social and economic circumstances, there will be a relative decline in availability of informal carers.
- Changing patterns of disease (increasing dementia, severe arthritis and serious visual and hearing impairments), diverse geographic spread of population and increasing need for psycho-geriatric care and palliative care are issues for provision of aged care services.

Reforms to the aged care system are ongoing, and the following reforms were announced in the 2015 Federal Budget (Australian Government 2015a):

- From February 2017, funding for Home Care Packages will follow the consumer so they are free to select any provider to deliver their care. This will give older Australians greater choice and increase competition which will encourage higher quality and innovation in service delivery. With this change, home care providers will not have to apply for home care packages in future Aged Care Approvals Rounds after 2015.
- From July 2018, the Government intends to combine Home Care Packages and the Commonwealth Home Support Program into a single integrated care at home program. The Commonwealth Home Support Program provides services to people with low care needs, but would benefit from assistance at home (including, domestic assistance with cleaning or washing clothes, personal care with showering, dressing, hair care and going to the toilet, home maintenance, minor home modifications, and some nursing care) as well as community-based services such as social activities and transport to get out and about for shopping or appointments.

Previous reforms have included:

- Expanding the availability of home care services and expanding the number of types of packages from two to four:
 - Level 1 supports people with basic care needs;
 - Level 2 supports people with low-level care needs (equivalent to the former Community Aged Care (CAC) Packages);
 - Level 3 supports people with intermediate care needs;
 - Level 4 supports people with high-level care needs (equivalent to the former Extended Aged Care at Home (EACH) and Extended Aged Care at Home Dementia (EACHD) packages). (Australian Government 2015b)

The definition of high care includes home care levels 3-4 and low care includes levels 1-2.

- Changes to residential aged care including:
 - Removing the distinction between low care and high care for permanent residential aged care (still exists in respite care). Residents continue to receive care to meet their



needs (and funding continues to be provided under the Aged Care Funding Instrument (ACFI) classification of residents);

- All care provided on an ageing in place basis;
- Encouraging aged care providers to build new or significantly refurbish facilities to create additional capacity and enhance quality and amenity of accommodation to residents. (Australian Government 2016d)

Benchmarking at the Regional Scale

A total of 73 aged care planning regions have been identified around Australia (Australian Government 2016a). The allocation and funding of residential aged care and home care places are based on a needs assessment for each of these aged care planning regions. These areas can be amended or benchmarking can be undertaken at the broader State level.

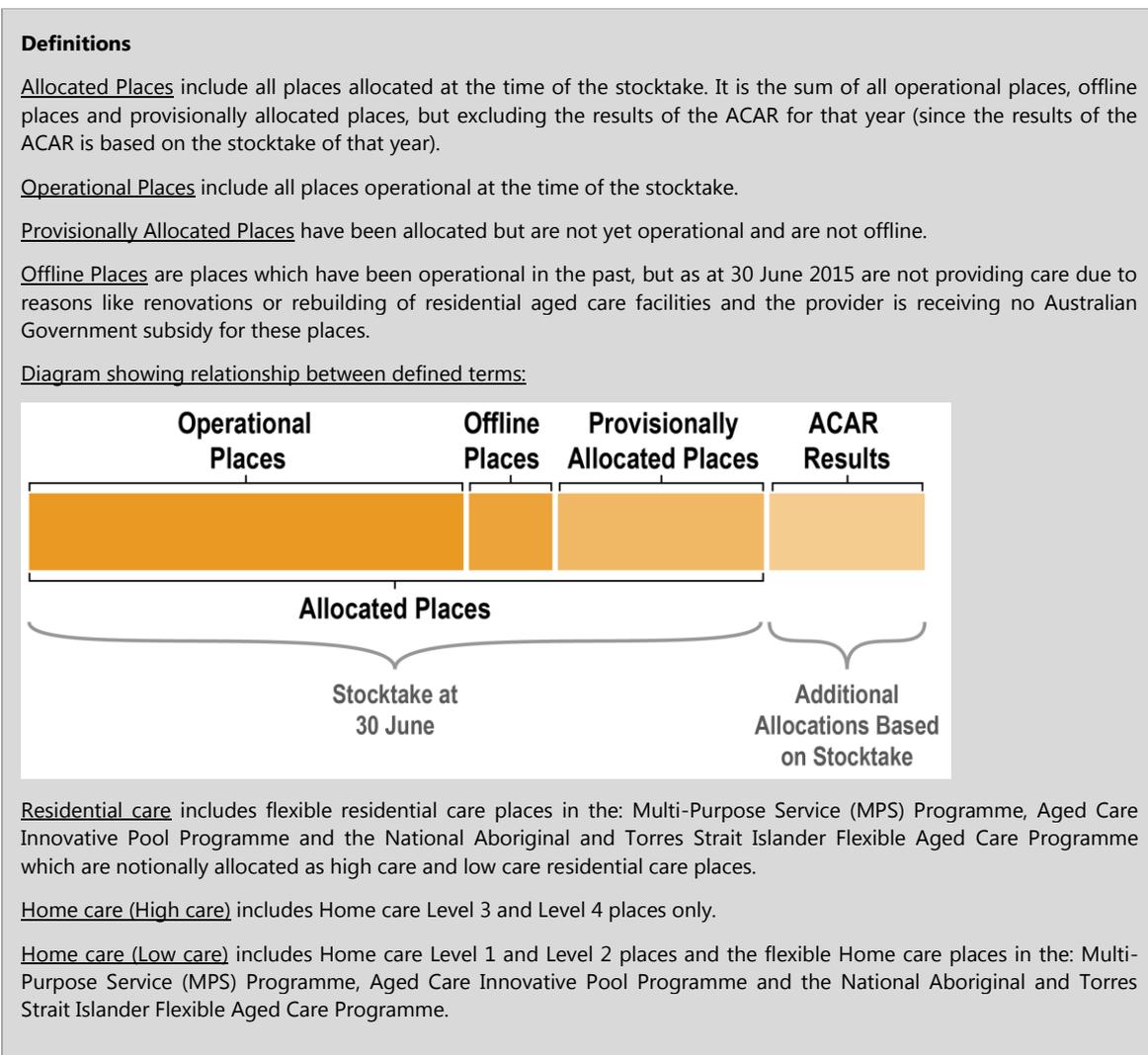
The Sunshine Coast aged care planning region encompasses the Sunshine Coast Council, Noosa Shire Council and much of the Gympie Regional Council area (including the city of Gympie itself but excluding Kilkivan SA2).

An analysis of the current and planned provision of residential aged care places in the Sunshine Coast aged care planning region has been undertaken compared to Australian Government targets. Home care places were also considered as these are relevant to assessing need for residential care, for example, if there was an over-provision of residential aged care this might be partially due to a lack of home care services forcing people into centre-based care.

The existing provision of aged care services in the Sunshine Coast aged care planning region is shown in **Table 1** below. At 30 June 2015, there were 3,878 residential aged care places in the region that were operational and an additional 102 places were offline (see **Figure 33** for definitions of aged care terms) (Australian Government 2016c). There were also a total of 1,586 operational home care places, made up of 1,102 low care places (level 1 and 2), and 484 high care places (level 3 and 4).



Figure 33. Definitions of Aged Care Terms



In addition, at 30 June 2015, there were 1,641 residential aged care places in the region which were provisionally allocated. Early in 2016, the results of the latest Aged Care Allocation Round were announced. In the Sunshine Coast aged care region, an additional 207 residential aged care places were allocated, as well as 110 low care and 110 high care home care places (Australian Government 2016b).

The national benchmark for aged care places is 125 places by 2021-22, comprising 80 places in a residential setting and 45 places in a home care setting (Australian Government 2016a). In 2013 and before recent reforms, the benchmark ratio was 113 places in total, comprising 44 low care and 42 high care places in a residential setting and 27 places in a home care setting (Australian Government 2013). Therefore, rather than benchmark the current 2016 provision against future targets, a target has been developed which sits between the 2013 target, and the 2021-22 target to allow a transition to the higher rates of provision. The benchmarks used in this analysis are shown in **Table 21** below.



Table 21. National benchmarks for aged care, 2016-2036

Service	2016	2021	2026	2031	2036
Residential care	80	80	80	80	80
Home care	34 (b)	45	45	45	45
Total	114 (a)	125	125	125	125

Notes: (a) Based on the average of the 2011 and 2021 targets. (b) Based on the calculated total target ratio and residential care ratio.

Sources: Australian Government 2013; 2016a;

To enable development and financial investment in residential aged care facilities, places are allocated to providers before they finalise their development plans and begin construction. Provisionally allocated places remain current for two years and they can be extended, revoked or surrendered (Australian Government 2016). The Australian Government has announced plans to increase the time period that a provisionally allocated place remains current to four years, with the option for two additional 12 month extensions (Australian Government 2015c).

A comparison between allocated and operational places was undertaken for the past few years to understand the timeframes involved in converting allocated places to operational places and it was found that it can take more than 5 years for the number of allocated places to become operational. Therefore, it has been assumed that:

- The number of operational places and temporarily offline places at 30 June 2015 will be assumed to be the current level of provision and will be benchmarked against the population of the region 70 years of age and older at 30 June 2016.
- The number of provisionally allocated places and places which have recently been allocated under the 2015 Aged Care Allocation Round (ACAR) will be assumed to be the level of future provision at 30 June 2021 and will be benchmarked against the population at that time. It is therefore assumed in the benchmarking that all of the provisionally allocated places and recent allocations will be provided within this 5 year period.

The results of the benchmarking analysis are shown in **Table 23** below. The number of allocated residential aged care places at 30 June 2016 was around 198 places lower than the federal target, while the number of home care places was around 146 places lower. With population growth and an increase in the target ratio, and accounting for additional home care packages recently allocated, the shortfall in provision of home care packages increases to 993 places, however, if all of the residential aged care places that have been provisionally allocated are delivered (which is unlikely), there could be a 751 surplus of residential aged care places in the region in 2021. By 2026 however, both residential and home care places are projected to be in deficit.



Table 22. Provision of Aged Care Services, Sunshine Coast Aged Care Planning Region, 2015-2016

Measure	Residential Aged Care	Home Care					Total	Total
		Level 1	Level 2	Level 3	Level 4	Flexible		
A. Operational Places	3,776	1,102		484		0	1,586	5,362
B. Offline Places	102	0	0	0	0	0	0	102
C. Total Operational and Offline – Assumed 2016 Provision	3,878	1,102		484		0	1,586	5,464
D. Provisionally Allocated Places at 30 June 2016	1,641	0	0	0	0	0	0	1,641
E. Results of 2015 ACAR ¹	207	7	103	0	110	0	220	427
F. Total Allocated Places (including 2015 ACAR) (A+B+D+E) – Assumed 2021 Provision	5,726	1,212		594		0	1,806	7,532
<i>G. Difference between Operational and Total Allocated Places (F-C)</i>	<i>1,848</i>	<i>110</i>		<i>110</i>		<i>0</i>	<i>220</i>	<i>2,068</i>

Notes: ACAR = Aged Care Allocation Round
 Source: Australian Government 2016b; 2016c;



Table 23. Benchmarking of Aged Care Services against Australian Government Targets, Sunshine Coast Aged Care Planning Region, 2015-16 - 2036

Year	Population 70+ years	Estimate of Operational Places		Federal Target		Shortfall or Surplus		
		Residential Aged Care Places	Home Care Places	Residential Aged Care Places	Home Care Places	Residential Aged Care Places	Home Care Places	Total
2016	50,946 (a)	3,878	1,586	4,076	1,732	-198	-146	-344
2021	62,191 (a)	5,726	1,806	4,975	2,799	751	-993	-242
2026	73,765 (a)	5,726	1,806	5,901	3,319	-175	-1,513	-1,689
2031	89,937 (b)	5,726	1,806	7,195	4,047	-1,469	-2,241	-3,710
2036	106,316 (b)	5,726	1,806	8,505	4,784	-2,779	-2,978	-5,758

Notes: (a) Population projections used for aged care benchmarking are different to Queensland Treasury projections. Australian Government projections were used as these are used to allocate places. However, these projections were only available for 2016-2027. (b) For 2031 and 2036, growth in the 70+ age group from Queensland Treasury projections were used to build on Australian Government projections.

Source: Australian Government 2016b; 2016c; 2016d; 2013; Queensland Government 2016g; Analysis undertaken by Briggs & Mortar Pty Ltd.



Benchmarking at Noosa Shire Scale

Benchmarking aged care provision at a local government or locality scale is no longer undertaken by the Australian Government, and the analysis below should be considered indicative only. Data provided by the Australian Government is structured around aged care planning regions, and it is difficult to determine the status of past place allocations for individual aged care facilities with certainty.

There were just four residential aged care facilities in Noosa Shire with operational places at 30 June 2015 (**Table 24**). It is also understood that additional places have been allocated to the facility in Cooroy (Kabara), and that these places are now operational. After investigating the results of prior aged care approval rounds, an additional two facilities were identified – Arcare Noosaville and McKenzie Noosa Ridge Aged Care. A recent application has been made for the Arcare Noosaville facility to Noosa Council for a 90 bed aged care facility at the Shire Business Centre but it does not yet have development approval. It is unable to be determined with certainty that the allocation of aged care places for the Noosa Ridge Aged Care facility in 2011 is still current, or if these provisionally allocated places have now lapsed. However it has been assumed that the facility is not proceeding and places allocated to McKenzie Aged Care have lapsed or been used elsewhere, given that approvals at that time (other than in exceptional circumstances) were valid for two years with a possible two year extension.

For the purpose of benchmarking residential aged care places, the total number of places for 2016 has been assumed to be 587 places. For 2021, assuming that the additional places at NoosaCare Cooroy have been delivered, and that the Arcare Noosaville places are delivered by 2021, the projected total would be 677 places.

Table 24. Residential Aged Care Facilities, Noosa Shire, 2015-2016

Aged Care Facility	Address	Places
Operational places at 30 June 2015		
Kabara Hostel	20 Topaz Street, Cooroy	73
Ozcare Noosa Heads	80 Cooyar Street, Noosa Heads	130
Carramar Hostel	186 Cooroy-Noosa Road, Tewantin	142
Noosa Nursing Centre	119-123 Moorindil Street, Tewantin	230
Newly Allocated Places – 2015 ACAR		
NoosaCare Inc – Kabara Hostel	20 Topaz Street, Cooroy	12
Provisionally Allocated Places in Past Rounds (a)		
Arcare Noosaville (Allocated in 2014)	Walter Hay Drive, Noosaville	90

Note: (a) Excludes McKenzie Aged Care, Noosa Ridge Facility at 11 Lenehans Lane, Noosaville, which was allocated 140 places in 2011.

Source: Australian Government 2016e.

Given the same methodology as used for the aged care planning region outlined above, Noosa Shire has a current shortfall of 87 residential aged care places, which could be expected to increase to 124 places in 2021, if currently planned facilities are delivered, and 261 places in 2026 (**Table 25**).



Table 25: Benchmarking of Aged Care Services against Australian Government Targets, Noosa Shire, 2015-16 - 2036

Year	Population 70+ years	Current Allocated Places	Federal Target	Shortfall or Surplus
2016	8,424 (a)	587	674	-87
2021	10,014 (a)	677 (c)	801	-124
2026	11,720 (a)	677 (c)	938	-261
2031	13,269 (b)	677 (c)	1,062	-385
2036	14,671 (b)	677 (c)	1,174	-497

Notes: (a) Population projections used for aged care benchmarking are different to Queensland Treasury projections. Australian Government projections were used as these are used to allocate places. However, these projections were only available for 2016-2027. (b) For 2031 and 2036, growth in the 70+ age group from Queensland Treasury projections were used to build on Australian Government Projections. (c) Includes places allocated to Arcare Noosaville which are not yet delivered.

Source: Australian Government 2016b; 2016c; 2016d; 2013; Queensland Government 2016g; Analysis undertaken by Briggs & Mortar Pty Ltd.

While there appears to be a surplus of residential aged care places for the Sunshine Coast aged care region at 2021 (if all allocated places are delivered), there appears to be a shortfall of allocated places in Noosa Shire currently, and by 2026, and therefore additional places in the local area would be beneficial to the local population so they do not need to move away to other parts of the Sunshine Coast aged care region (e.g. Gympie) to access residential services. In addition, the number of home care places at the Sunshine Coast aged care planning region level is below the targets established by the Australian Government, and this may force some local residents to move into residential aged care before they would otherwise need to⁷.

A number of additional aged care facilities are proposed or approved in the Noosa Shire, however aged care places have not been allocated to these facilities by the government as far as can be determined:

- Palm Lake Care has a current development approval for a 120 bed aged care facility with its Retirement Resort at Cooroy, however no aged care places have been allocated.
- Sundale Tewantin has a current development approval for a 60 bed aged care facility within its proposed Retirement Village at Tewantin, however places have not been allocated to this facility.
- Blue Care has development approval for a 118 bed aged care facility at Grass Tree Court, Sunrise Beach, but again no places have been allocated.

These facilities could redress the overall need for aged care for Noosa Shire if delivered by 2026 (**Table 26**). However, even if all of these facilities are provided, a shortfall of 87 places would again emerge by 2031, and grow to a shortfall of 199 places by 2036.

⁷ Home care is provided to people across the community, and therefore home care places are allocated at the aged care planning region level. Addresses provided in the data relate to the location of the service provider, not where services are delivered. Therefore home care is not able to be benchmarked at a smaller geographic scale.



Table 26: Benchmarking of Aged Care Services against Australian Government Targets, Noosa Shire, 2015-16 - 2036

Year	Population 70+ years	Assumed Provision of Places	Federal Target	Shortfall or Surplus
2016	8,424 (a)	587	674	-87
2021	10,014 (a)	677 (c)	801	-124
2026	11,720 (a)	975 (d)	938	37
2031	13,269 (b)	975 (d)	1,062	-87
2036	14,671 (b)	975 (d)	1,174	-199

Notes: (a) Population projections used for aged care benchmarking are different to Queensland Treasury projections. Australian Government projections were used as these are used to allocate places. However, these projections were only available for 2016-2027. (b) For 2031 and 2036, growth in the 70+ age group from Queensland Treasury projections were used to build on Australian Government Projections. (c) Includes places allocated which are not yet delivered (Arcare Noosaville). (d) Includes proposed places which are not yet allocated (Palm Lake Care, Sundale Tewantin, and Blue Care Sunrise Beach).

Source: Australian Government 2016b; 2016c; 2016d; 2013; Queensland Government 2016g; Analysis undertaken by Briggs & Mortar Pty Ltd.

Retirement Villages / Independent Living Units

Retirement villages or independent living units are a cluster of dwellings (separate houses, semi-detached dwellings or apartments) provided exclusively for older people, administered by a central body (e.g. body corporate, trustee or management company), and managed by employed staff (most commonly an on-site manager). Some services may be provided on-site, home care may be provided to occupants from external providers, and some villages provide on-site residential aged care. It is seen as highly desirable that retirement villages be established with all three levels of care (on-site services, home care provided from off-site providers, and on-site or nearby residential aged care).

There were five retirement villages identified in the Noosa Shire in October 2016. In addition, one additional retirement village was under construction and two were approved but construction had not begun.

A significant majority of dwellings are provided as detached or semi-detached dwellings. Around 746 detached/semi-detached dwellings had been constructed, and an additional 509 detached/semi-detached dwellings were under construction or approved at October 2016 (



Table 27). One retirement village (Noosa Domain Village) has proposed 60 apartments, however construction has not started on these. No standalone apartment blocks or resort style accommodation for retirement living or over 50s/55s under the Manufactured and Mobile Homes Act were identified in the Shire, although Palm Lake Cooroy will operate in this manner.

Retirement accommodation was provided throughout the Shire - in Noosaville, Tewantin and, with the construction of new facilities, at Cooroy and Sunrise Beach.



Table 27. Retirement villages, independent living units, Noosa Shire, 2016

Name	Location	Dwellings and Notes
Available		
Laguna Estate Retirement Village	21 Lake Weyba Dr, Noosaville	Around 186 units, approximately 68 with 3 bedrooms, and 118 with 2 bedrooms. These are mostly arranged as semi-detached dwellings. A small two storey block of serviced apartments is also located on site.
Noosa Waters Retirement Estate	39 Lake Weyba Drive, Noosaville	Around 76 units with 2 bedrooms or 2 bedrooms plus study. Owned and operated by Southern Cross Care.
Noosa Domain Village	35 Walter Hay Drive, Noosaville	Ultimately 110 units and 60 apartments. In October 2016, around 13 units and the apartments were yet to be constructed. Units are small separate houses with 2 and 3 bedrooms, and some with 3 bedrooms and a study.
Hibiscus Noosa Outlook	71 St Andrews Dr, Tewantin	Around 234 units.
Riverlands Mature Aged Village	139 Moorindil St, Tewantin	Around 140 units.
Under Construction		
Palm Lake Resort	19 Trading Post Road, Cooroy	Under construction. Started selling off the plan in January 2016. 220 detached dwellings are proposed. A 120 bed aged care facility is also proposed.
Approved		
Sundale Tewantin	82 McKinnon Drive, Tewantin	To commence construction 2017. 180 units and a 60 bed aged care facility are proposed.
Blue Care Grasree Court	Grasree Ct, Sunrise Beach	Approval in 2011 for 109 x 2-bedroom units. A 118 bed residential aged care facility is also contained within the approval, which remains current.

Source: Internet searches; NearMap 2016; Noosa Shire Council's Application Tracking tool.

There is no regulation regarding the number of retirement village or independent living units that can be provided, and no known advisory level of independent living units relative to residential aged care accommodation. Additional retirement village or independent living units will generally be provided based on market assessment by developers. An analysis of potential need for independent living units was undertaken below and is shown in **Table 28**.



Table 28. Benchmarking of Independent Living Units against Notional Benchmarks, Noosa Shire, 2016 - 2036

Year	Population 65+ years	Current Provision ILUs	Proposed or Under Construction(a)	At Notional Benchmark of 4%	At Notional Benchmark of 8%	At Notional Benchmark of 10%	Excess or shortfall of existing supply at 10%	Excess or shortfall at 10% including all proposed units
2016	12,140	746	569	324	647	809	-63	506
2036	18,920	746	569	505	1009	1261	-515	54

Notes: Includes assumption of an occupancy rate per dwelling of 1.5 persons. (a) Includes 60 apartments proposed at Noosa Domain Village

A notional benchmark of 4% of people aged 65 years and over has in the past been used to calculate need. This notional rate was applied in the Residential Aged Care and Retirement Housing Study undertaken for Noosa Shire in 2006 (by Humphreys Reynolds Perkins). To determine the number of dwellings required, an occupancy rate also needs to be applied. Assuming an average occupancy of 1.5 persons per dwelling, the required provision of retirement units in Noosa Shire would be around 325 units in 2016. The actual current provision is well above this requirement (at 746 units, excluding yet to be constructed units). Given that occupancies are very high (usually full with waiting lists), this suggests that 4% is not an applicable rate in Noosa Shire.

However, the Residential Aged Care and Retirement Housing Study also suggested that a more realistic and sustainable future indicator was between 4 and 8%^[3] given that Noosa Shire is an attractive retirement destination. The notional benchmark of 8% is again exceeded by the current provision.

It was recognised in the *Productivity Commission Report, Caring for Older Australians*, in 2011, that retirement villages are playing an increasingly important role in accommodating older Australians. It quoted the Retirement Village Association's estimate of a national penetration rate in 2010 of 5.3%, and a national penetration rate by 2025 of around 8%.

In other developed countries, like the US, over 10% of the over 65 population live in seniors' villages. Many industry leaders believe that there is an opportunity for exponential growth in the sector in Australia beyond natural demographic shifts and some Australian commentators have made predictions on the basis of up to 10%^[4].

It is notable that the above are nation-wide averages, and a higher penetration rate could be assumed to occur in a retirement destination. Research suggests that up to 12% of the population in certain regions of other developed nations with similar demographics (including the United States) live in senior living accommodation.

Adopting the 10% notional rate, the current provision is a theoretical shortfall of 63 units (in 2016, 746 units, compared to the required benchmark of 809 units). By 2036, an additional 515 units

^[3] Note that this suggestion is now 10 years old, in a rapidly changing field.

^[4] Prime Trust (undated), The Demographics. Accessed 7.10.10 at www.primetrust.com.au/the-demographics/w1/i1001182



would be required to reach the benchmark. If all approved/proposed units are constructed, the supply would be adequate to 2036. However if any of the approved developments are not constructed, a deficiency would occur.

Should the popularity of retirement villages continue to increase over time as has occurred in Australia and to an even greater extent overseas, it is also possible that a higher shortfall would arise in the future.

Implications for Housing Provision

The implications of the above are that both additional Residential Aged Care and Retirement Villages will be required in Noosa Shire to meet the needs of the ageing population. Demand also continues for these to be in the coastal area, in communities where empty nesters have lived.

While some of these needs may be met by increasing smaller, affordable dwellings in the community, and allowing secondary dwellings for unrelated parties, it is anticipated that there will be an ongoing and possibly increasing demand for these types of accommodation. This is considered likely to occur despite increasing availability of home care and people being able to stay in their own homes longer, if only because of the economic imperative for many to downsize.

While new models of aged housing such as vertical villages could be provided, they will still be limited by height constraints of the Planning Scheme and the general desire of the community for development to remain 'low scale'.

At the very least, sites earmarked for aged housing, or with current approvals, will need to be protected against other types of development, and redevelopment of existing sites into a variety of aged housing forms, facilitated.

4.1.2 People with a Disability

Available Housing for People with a Disability

Supported accommodation for people with disability appears extremely limited in Noosa Shire. The only group housing identified is as shown in **Table 29**. Otherwise private housing may have been modified to varying extents to meet individual needs.

Table 29. Accommodation for People with Disability, Noosa Shire

Name	Address	Housing/Services
Group Home	Tewantin	Coast2Bay in collaboration with the Department of Communities – Disability Services, has completed a residence to house 6 people with disabilities who are confined to wheelchairs. The plan shows the residence is designed for specific needs. Living space inside and out is open plan and spacious to allow ease of movement for the occupants. The property is close to the Tewantin Village and Noosa River so the residents have the opportunity to enjoy the relaxed lifestyle that is on offer in this beautiful riverside location. Wesley Mission Brisbane provides the support services for tenants at this property.
Flat Building	Tewantin	It is understood that a flat building in Tewantin with 10 units and a caretaker is operated by a local church. The funding arrangements are unknown.



Source: *Coast2Bay Housing Group 2015; Noosa Shire Council 2016a (Survey Results); Local knowledge of Council Officers and service providers.*

The Queenslanders with Disability Network, National Shelter and Griffith University (2016) recently released a housing issues paper relating to people with a disability. The report highlighted a number of housing issues for people with a disability:

- There is a clear disparity between the vision of group homes and congregate care settings⁸ by providers and people with disability themselves as a model of accommodation provision, and the aspirations of people with a disability to live in a broader range of settings, including living alone and with people without a disability.
- There is little interest in considering how people with a disability could work towards owning their own dwelling despite this contributing to more secure tenure.
- Rental accommodation is unaffordable for people with a disability.
- People with a disability suggested that they felt they had insecure tenure in social housing, and were forced into co-tenancy arrangements in social housing.
- There continues to be disinterest from private builders and designers in providing accessible housing. The report notes that the housing industry has not changed its practices and will likely reach less than 5% of the 2020 target for universal housing provision (see below).
- There is an inability by people with disability to afford home modifications and assistive technology.
- Some are forced to leave regional and remote areas due to lack of accessible housing, disability services and transport.

The commencement of the NDIS in June 2016 is anticipated to increase demand for wider housing options as people seek housing that is more in keeping with their preferences than current group home arrangements. Some of the options for providing housing for people with disability are discussed below.

Universal housing

The term 'universal housing' is a broad term covering the range of dwelling design characteristics which improve the accessibility, versatility and comfort of dwellings for a range of people at different stages of life. These dwellings might also be called adaptable or accessible dwellings⁹. It should be noted that fully accessible dwellings are more costly for the developer, and investors who have bought off the plans find themselves with a niche market dwelling to sell, or a home that is totally unsuitable for their lifestyle. The additional cost of incorporating adaptable features is usually less than five percent of the overall construction cost, and in many cases, the cost is virtually nil (Bringolf, 2004).

⁸ a placement setting that consists of 24-hour supervision in highly structured settings

⁹ Accessible housing is generally a purpose built dwelling for a person or persons with a disability. This may be a new dwelling or one that is modified to suit the user. Adaptations made during home modifications are not to be confused with "adaptable housing".

Adaptable housing refers to dwellings with design features that are easily adapted at a later date to flex with the changing needs of the occupants.

(Definitions from Bringolf, 2004.)



Universally designed dwellings are generally more suitable for people with a disability and for older people where steps and level changes can create trip hazards and significant injuries. Far from being a niche issue, research in the United States estimates that around 60% of new homes will be occupied by at least one person with a disability during its lifetime (40 years), and this increases to around 90% of homes considering visitors to the dwelling such as friends or relatives (Australian Government 2010).

In late 2009, a national dialogue on universal housing design was convened bringing together participants from all levels of government and key stakeholder groups to develop a strategic plan for universal housing design. The strategic plan was released in July 2010 (Australian Government 2010). The purpose of the national dialogue was to develop the Livable Housing Design guidelines, universal housing targets, and other strategies to increase the provision of universal housing in Australia.

In July 2010, the Livable Housing Design Guidelines were launched, and Dialogue members committed to the Strategic Plan. The Australian Government pledged \$1 million over four years to support the implementation of the initiatives set out in the Strategic Plan. In June 2011, National Dialogue members agreed to establish a new not-for profit organisation, Livable Housing Australia, to drive the strategic directions set-down by the National Dialogue and to champion the Livable Housing Design Guidelines.

The agreed interim targets for voluntary uptake of the guidelines for all new residential housing were:

- 25% to Silver level by 2013;
- 50% to Silver level by 2015;
- 75% to Silver level by 2018;
- 100% to Silver level by 2020.

National dialogue members believed that the Commonwealth and all state and territory government providers of social housing should commit to delivering all new public housing to an agreed universal housing design standard. The targets proposed for the uptake of the guidelines by the Commonwealth and States were:

- 100% to Silver level by 2011;
- 50% to Gold level by 2014;
- 75% to Gold level by 2017;
- 100% to Gold level by 2019.

The Livable Housing Design guidelines outline the design elements required to meet the silver and gold performance levels, as well as the higher platinum level. The third edition of the Livable Housing Design guideline was released in 2015 (Livable Housing Australia), and provides sixteen livable design elements that can be integrated into a new home or existing home renovation. The three performance levels relate to the achievement of these housing design elements as below:

- Silver level – meets the eight core livable housing design elements which focus on key structural and spatial elements for flexible and adaptable use.
- Gold level – meets a higher standard for most of the eight core livable housing design elements and achieves some of the additional design elements.



- Platinum level – meets enhanced standards for all of the core liable housing design elements and achieves all of the additional design elements.

Despite the national guideline and strategic plan being endorsed by the Council of Australian Governments (COAG) and included in the National Disability Strategy 2010-2020, and a commitment to meet the guidelines by the national dialogue members, in December 2014 it was noted that no interim targets had been met and it is unlikely that even 5% of the 2020 target for the provision of new universally designed dwellings will be reached with the current voluntary approach (Australian Network for Universal Housing Design 2016). This minimal response was considered to indicate market failure and bring the voluntary approach into question.

As a result, the Australian Network for Universal Housing Design have argued that it is time for responsible government to intervene in the form of regulation within the National Construction Code. In a proposal¹⁰ submitted to Standards Australia to review AS4299-1995 Adaptable housing to align with the 2010-2020 National Disability Strategy (Livable Housing Design), the network suggested that all new housing in Classes 1a and 1b, 2, 3 and 4 should provide a minimum set of universal housing design elements being:

1. A safe continuous and step free path of travel from the street entrance and parking area to a dwelling entrance that is level;
2. At least one level (step-free) entrance into the dwelling;
3. Internal doors and corridors that facilitate comfortable and unimpeded movement between spaces;
4. A toilet on the ground (or entry) level that provides easy access;
5. A bathroom that contains a hobless (step-free) shower recess;
6. Reinforced walls around the toilet, shower and bath to support the safe installation of grabrails at a later date.

Among other benefits, the authors of the proposal suggest that this initiative could increase the cost-effectiveness of the National Disability Insurance Scheme and aged care reforms by decreasing the demand for home modification assistance and specialised residential care.

Economic Development Queensland has also created a guideline for accessible housing (2015) which outlines a small number of key design elements to achieve accessibility for dwellings constructed in Priority Development Areas (PDAs). The guideline suggests that for development within PDA areas in Queensland, unless otherwise mandated, accessible dwellings will make up:

- 10% of dwellings for all multiple residential dwelling projects;
- 20% of dwellings for all multiple residential dwelling projects that are seeking superior design outcomes in Bowen Hills and Northshore Hamilton.

While not currently supported by legislation in Queensland, a trend in other States (especially NSW) is for a minimum of 10% of dwellings of various types to be adaptable (as currently defined by Australian Standard AS 4299-1995), and this has been widely used elsewhere as a standard. Some Councils in NSW have requirements ranging from 30 to 50 percent of multi-unit

¹⁰ Australian Network for Universal Housing Design, 2016, See Appendix 1 for Proposed Deemed-to-Satisfy provisions (draft)



developments depending on the number of storeys of the building (over three storeys), and 100% in aged persons' housing. A small percentage may also be required in tourist developments.

In Queensland the lack of State backing means that only incentives could be introduced to encourage developers to provide adaptable housing. A target can be used to guide developer decisions and influence negotiations with developers. The experience of Councils elsewhere has been that adaptable dwellings have found a ready market and indeed have become a selling point of developments where they have been used. However it is recognised that local factors such as minimum floor height in flood affected areas like Noosaville requiring the habitable floor to be raised; and in Noosa Heads the beach dune system meaning some buildings need to step down a rise, can lead to difficulties in achieving a single storey living level let alone a continuous path of travel from footpath to dwelling. This may limit the ability for developers to take up such opportunities.

Housing for people with a disability under the NDIS

The Queenslanders with Disability Network, National Shelter and Griffith University (2016) report suggests that while the National Disability Insurance Scheme (NDIS) has brought attention to the needs of people with a disability, housing has not been central to its priorities. Only around 28,000 or 6% of NDIS participants, most likely those with profound rather than moderate disability, will be eligible for specialist disability accommodation funding (NDIS 2016). For singles, this is 25 per cent of the basic rate of the Disability Support Pension (DSP) plus any Commonwealth Rent Assistance (CRA).

From 1 July 2016, the responsibility for funding specialist disability accommodation (SDA) will transition to the National Disability Insurance Scheme from the state and territory governments (NDIS 2016). Specialist disability accommodation refers to accommodation that assists with the delivery of support services for people with significant functional impairment and/or very high support needs. It is classified using the Livable Housing Australia guidelines, plus additional requirements as specified below:

SDA design category	Definition	Minimum Requirements for New Builds
Basic	Housing without specialised design features but with other important SDA characteristics (e.g. location, privacy, shared supports).	<ul style="list-style-type: none"> Available for Existing Stock only.
Improved Livability	Housing that has been designed to improve 'Livability' by incorporating a reasonable level of physical access and enhanced provision for people with sensory, intellectual or cognitive impairment.	<ul style="list-style-type: none"> Livable Housing Australia 'Silver' level One or more 'improved livability' design features such as luminance contrasts, improved wayfinding or lines of sight



SDA design category	Definition	Minimum Requirements for New Builds
Fully Accessible	Housing that has been designed to incorporate a high level of physical access provision for people with significant physical impairment.	<ul style="list-style-type: none"> • Livable Housing Australia 'Platinum' level • External doors and external outdoor private areas to be accessible by wheelchair • Bathroom vanity/hand basin to be accessible in seated or standing position • Power supply to doors and windows (blinds), for retrofit of automation as necessary • Consideration must be given to whether it is appropriate for the kitchen sink, cooktop, meal preparation bench area and key appliances (dishwasher, oven, microwave oven, laundry appliances) to be accessible in seated or standing position
Robust	Housing that has been designed to incorporate a high level of physical access provision and be very resilient, reducing the likelihood of reactive maintenance and reducing the risk to the participant and the community.	<ul style="list-style-type: none"> • Livable Housing Australia 'Silver' level • Resilient but inconspicuous materials that can withstand heavy use and minimises the risk of injury and neighbourhood disturbance including: <ul style="list-style-type: none"> ○ High impact wall lining, fittings and fixtures (e.g. blinds, door handles) ○ Secure windows, doors and external area. • Appropriate sound proofing if residents are likely to cause significant noise disturbances (if required must retrofit in new builds if not previously installed at building stage) • Laminated glass • Layout with areas of egress and retreat for staff and other residents to avoid harm if required • Consideration must be given to providing adequate space and safeguards throughout the property to accommodate the needs of residents with complex behaviours
High Physical Support	Housing that has been designed to incorporate a high level of physical access provision for people with significant physical impairment and requiring very high levels of support.	<p>All requirements listed in the 'Fully Accessible' design category, plus:</p> <ul style="list-style-type: none"> • Structural provision for ceiling hoists • Assistive technology ready • Heating/cooling and household communication technology (e.g. video or intercom systems) appropriate for the needs of residents • Emergency power solutions to cater for a minimum two hour outage where the welfare of participants is at risk • 950mm minimum clear opening width doors to all habitable rooms



SDA design category	Definition	Minimum Requirements for New Builds
All	Applicable to all categories.	In all cases, SDA should: <ul style="list-style-type: none"> • Ensure the property is designed and maintained in a manner that is consistent with other properties in the neighbourhood • Recognise the importance of outdoor areas and allow for adequate land area commensurate with the number of residents in the household¹¹

Source: NDIS 2016;

Even to achieve this level of provision of suitable dwellings (28,000 dwellings), the NDIS is developing special financial incentives for governments, organisations, and developers to encourage investment. A decision paper published by the NDIS on pricing and payments for specialist disability accommodation (NDIS 2016) suggests that in order to encourage the provision of specialist disability accommodation, property owners will receive higher than regular market yields.

Given the decision paper on pricing and payments was released on 1 June 2016, it is difficult to predict the impact that this new policy will have on the delivery of accommodation for people with severe disabilities.

A website article authored by a private consulting firm (Disability Services Consulting 2016) responding to the draft position paper on pricing and payments for specialist disability accommodation suggested that the risk of vacancy may dissuade investors from constructing new dwellings.

It suggests that:

Investors and providers will be thinking carefully about whether they want to develop housing with no guarantee that any NDIS participant will live in it. The NDIA has said that providers bear the risk of vacancies – and they estimate this ranges from 3-10% of a provider’s yearly income. This position will be a big concern to some providers. There is limited information available on the current state of how specialist disability housing works. Plus, the NDIS represents a transformational change in how disability housing works with new housing models and a new funding model from the NDIA. This market uncertainty may stop some developers and lenders from choosing to be part of such an uncertain venture – especially for specialized housing that can’t be easily re-sold in the private market. If that is the case, this would be an enormous loss, given that the people with disability who most need new housing options need specialised dwellings.

Housing for people with a disability not likely to be covered by the NDIS

National Disability Services (NDS) (Australia’s peak body for non-government disability service organizations) is concerned that the housing barriers and undersupply faced by a much broader

¹¹ It is noted that this may be difficult due to the above local factors. Council does not support benching a whole site to create a level outdoor living area.



group of people with disability who are ineligible for SDA remains a challenge for policy makers. Housing stress is exacerbated for people with disability by several factors: income disparity, higher dependency on government transfers, higher expenditure of income on housing, the widening gap between income levels and house prices, and a lack of suitable housing. NDS considers that more efforts are needed to solve this problem, given the imminent roll out of the NDIS and the long lead time of housing development (NDS, 2016).

At the present time, the NDS estimates that nationally:

- There are over 6,000 young people in aged care facilities;
- In 2012, 78,000 ageing parents were concerned about what will happen to their children once they pass away or can no longer support their child;
- People with disability experience long waiting lists for accessible and affordable housing;
- If no action is taken, there will be up to 122,000 NDIS participants without appropriate disability housing by 2020 (NDIA, 2016).

The following excerpt from the Summer Foundation identifies some of the problems in relation to determining and providing for wider disability housing needs.



SUMMER FOUNDATION

The Summer Foundation plans and builds housing demonstration projects to provide examples of housing suitable for people with severe disabilities to enable more independent living rather than being forced into nursing homes. Three demonstration projects have been built with project partners. Their vision is that housing for people with a disability is routinely located in all new medium and high density residential development in Australia.

In 2016, the Summer Foundation with the Victorian Transport Accident Commission published a discussion paper on the need for a more contemporary design framework for accessible housing for people with significant disabilities. In relation to the current design guidelines and Australian Standards, the report notes:

There is very little in the way of required legislative compliance in access provisions for residential housing. Specifically, in relation to the Building Code Australia (BCA):

- *Class 1 dwellings (residential houses) have no legislative compliance for access.*
- *Class 2 dwellings (apartment buildings) have some compliance provision in accordance with the Access to Premises Standards, however this is limited to accessible paths of travel from street boundaries to individual floor levels and apartment doors, and the provision of access to common areas such as swimming pools, gyms, laundries etc. within developments.*
- *Class 3 dwellings (a group home or joined cluster of units) require significant legislative compliance. A particularly apt example is the requirement to comply with the requirements of AS 1428.1 for an accessible bathroom. This legislative compliance for a Class 3 building results in an institutional space (requiring grab rails, shower seat, disabled toilet and back rest, which will often not suit the functional needs of the occupant with a severe disability) rather than a space that is home-like and easily adapted to meet the specific needs of the current occupant. It is therefore important to understand the design impact that a BCA Class 3 building will deliver versus a residential type housing option that is classified as a BCA Class 1 or 2 dwelling.*

The Livable Housing Design Guidelines (LHDG) have not been legislated in Australia (under the National Construction Code), and are therefore optional to adopt during a design process. Even if they did become legislatively adopted in future, these requirements in isolation will not ensure an adequate level of access provision to accommodate the needs of people with severe disability. This applies to even the highest 'Platinum' level of LHDG. This is because there are many design features that are not addressed in the LHDG, such as access to external entertainment areas and only very limited access provision within the kitchen.

The government and the housing and disability sectors often choose to use parts of AS 1428.1 or AS 1428.2, however it must be noted that these standards largely relate to access provision to public buildings, and these standards only accommodate approximately 80% of disability users. The majority of references relate to wheelchair access provision only.

Finally, AS 4299 (Adaptable Housing) is effectively aimed at supporting future adaption of an existing dwelling to accommodate ageing occupants or occupants who acquire a disability at some stage in life whilst living in that particular adaptable house. One of the findings of this evaluation is that the term 'adaptable' is quite different in the context of designing for people with significant disability in the early stage of a new building project.

The Summer Foundation suggest that some elements of the current legislation, guidelines and standards may need to be exceeded to meet the needs of some people with a significant disability, but on the other hand, meeting some of the requirements of the Australian Standards adds unnecessary cost and an institutional (or hospital) feel to home environments.

The analysis of current legislation, guidelines and standards, and learnings from the demonstration projects



have so far enabled the identification by the Foundation of the following insights and issues for housing:

- *Guidelines and standards need to be relevant, and support specific outcome objectives:*
 - *AS 1428.1 has very little or no relevance to residential housing.*
 - *A BCA Class 3 type development triggers AS 1428.1 for bathrooms and creates an institutional type bathroom.*
 - *The LHDG Platinum Level does not provide all the necessary design requirements for someone with significant disability.*
- *Housing needs to be affordable in terms of construction and tenancy:*
 - *Compliance with AS 1428 has a significant overall cost impact.*
- *Housing should be large enough to accommodate reasonable circulation but not so large that the cost becomes prohibitive.*
- *Housing should be universally designed to suit a range of people, and be adaptable in a cost-effective manner to suit individuals.*
- *Housing should be home-like, not institutional or commercial in appearance, layout and feel.*
- *Housing should be durable.*
- *Housing needs to be integrated in mainstream residential housing.*
- *Housing needs to be adaptable in a cost effective way, and not in the traditional method of compliance to AS 4299.*

The Summer Foundation's design approach for people with a significant disability includes the following values or objectives:

- *Appropriate for a diverse range of people – driven by the Universal Design Principles and Livable Housing Design Guidelines Platinum Level.*
- *Supports people to live with the greatest level of independence.*
- *Creates home environments rather than institutional environments.*
- *Supports family and friends to visit and the privacy to do this.*
- *Functional, durable, flexible and cost effective design.*
- *Possible to sell the property on the open market if required.*

Implications for Housing

Noosa Shire currently has a relatively high proportion of people who need assistance with one or more core activities including self-care, mobility and communication because of a long-term health condition, disability or old age. Noosa Shire had 5.1% of its population in this category at the 2011 census, compared with 4.4% on average in Queensland. This figure tends to be correlated with age, although not exclusively so. However, this proportion could be expected to continue to increase as the population further ages.

Tewantin reported the highest proportion of residents in need of assistance with a core activity (8.1% or 862 residents) followed by Noosa North Shore (7.4% or 24 residents) (**Figure 8**). Sunshine Beach to Peregian Beach (2.5% or 255 residents) and Cooroibah (2.6% or 46 residents) had the lowest proportions.

Special accommodation in Noosa Shire for people with disabilities was found to be extremely limited. These people can also be in low income groups. Of all the households on the Social Housing Register, 80% were households where a member of the family has a disability.



There is clearly a need to ensure that affordable dwellings for people with disabilities are available, either through special group accommodation or through increasing the number of dwellings that are adaptable or universally designed at least to a moderate level. The difficulties in achieving this in Noosa Shire due to the local physical constraints discussed above, and also given the lack of higher density development, are however likely to remain a barrier to this being widely achieved in the development market.

4.1.3 Low Income Groups/Young People

The *Noosa Social Strategy 2015* identified several key issues with potential implications for housing:

- Emerging vulnerable groups in the community include some lone person households, LGBTI+ people (lesbian, gay, bisexual, trans, intersex), and disengaged young people;
- Homelessness is an increasing issue especially for young people;
- Availability of affordable housing (and limited housing diversity), rental housing and short-term crisis housing are issues;
- Availability of support, respite and affordable independent living options is limited for young people and adults with an intellectual or physical disability (and their carers).

The strategy suggests that Council aim to encourage accessible and affordable spaces and places for people to live, meet and play, and influence housing affordability by encouraging a diversity of housing opportunities. Key initiatives included that Council will:

- Plan for an increase in the number of elderly people living independently;
- Work with government agencies, not-for-profit organisations and the business sector to explore innovative ways of tackling housing affordability;
- Adopt a multi-faceted, coordinated approach with strong partnerships between government, not-for-profit groups, and the community to address homelessness.

The shortage of affordable housing was seen as contributing to homelessness. An analysis of housing stress and housing affordability is undertaken below. Note that specific consideration of housing for older people, some of whom may be low income households as well, is undertaken in Section 4.1.1. A proportion of these are unlikely to be included in the data presented, e.g. on housing stress, as they do not rent or have a mortgage. However appropriate and more affordable housing may still be an issue.

Housing Stress

Housing stress is an indication of the level of vulnerability of the lowest income groups.

Households are said to be in housing stress when the lowest 40% of income earners are paying more than 30% of their household income on accommodation. Rent stress is sometimes viewed as more significant than mortgage stress as mortgage stress is generally offset by the accrual of equity in the asset over time. However mortgage stress can still create difficulties in meeting the basic costs of living.

Estimates of housing stress are compiled and published by the Public Health Information Development Unit (PHIDU) using Census data. The data is published for ABS Statistical Areas Level 2 (SA2s). Although these areas do not exactly align with Noosa Shire boundaries (for instance Peregrin Springs is included in the Peregrin SA2) they are a close approximation.



In 2011, there were 1,116 low income households spending more than 30% of their household income on their mortgage in Noosa Shire (**Table 30**). This was approximately 16% of all households who were paying a mortgage at the time, and the proportion is significantly higher than for Greater Brisbane¹² (8.5%) and Queensland (9.8%). There were also 2,231 low income households paying more than 30% of their household income on rent payments. This was approximately 34.5% of all households who were renting, and this proportion is also higher than the proportions of Greater Brisbane (24.5%) and Queensland (25.3%).

Overall there were 3,347 households in housing stress (low income households paying more than 30% of their income on mortgage repayments or rent), and this equated to 15.6% of all households in Noosa Shire.

Table 30. Housing Stress, Households in Noosa Shire, Greater Brisbane and Queensland, 2011

Area	Mortgage Stress (a)	Rental Stress (b)	Housing Stress (c = a+b)	Total Households
Noosa Hinterland (d)	521 (17.1%)	525 (38.3%)	1,046 (14.1%)	7,406
Noosa Heads (d)	62 (15.3%)	190 (28.8%)	252 (15.9%)	1,589
Noosaville (d)	113 (14.8%)	431 (34.3%)	544 (16.6%)	3,277
Peregian (d)	120 (13.3%)	314 (31.1%)	434 (15.5%)	2,791
Sunshine Beach (d)	114 (14.2%)	312 (32.2%)	426 (17.2%)	2,475
Tewantin (d)	186 (16.4%)	459 (38.5%)	645 (16.2%)	3,982
Noosa Shire (e)	1,116 (15.8%)	2,231 (34.5%)	3,347 (15.6%)	21,520
Greater Brisbane (f)	23,025 (8.5%)	60,005 (24.5%)	83,030 (11.3%)	732,495
Queensland	52,583 (9.8%)	133,599 (25.3%)	186,182 (12.0%)	1,547,306

Notes:

a = low income households in mortgage stress, and proportion of low income households in mortgage stress as a proportion of all households with a mortgage.

b = low income households in rental stress, and proportion of low income households in rental stress as a proportion of all households renting.

c = low income households in housing stress, and proportion of low income households in housing stress (low income households in mortgage stress plus rental stress) as a proportion of all households.

d = ABS Statistical Area Level 2 (SA2).

e = sum of SA2s, closest approximation of Noosa Shire.

f = Greater Brisbane is the Greater Capital City Statistical Area as defined by the Australian Bureau of Statistics. It includes the local government areas of Brisbane, Ipswich, Redland, Logan, Somerset, and Moreton Bay, and parts of Scenic Rim and Lockyer Valley.

Source: PHIDU 2014;

More recent rental stress data (not comparable to the above) is available from a dataset compiled by the Australian Government Department of Social Services and reported on by the Queensland

¹² Greater Brisbane is the Greater Capital City Statistical Area as defined by the Australian Bureau of Statistics. It includes the local government areas of Brisbane, Ipswich, Redland, Logan, Somerset, and Moreton Bay, and parts of Scenic Rim and Lockyer Valley.



Department of Housing and Public Works (Queensland Government 2016f). Rental stress for this dataset is based on low income households (households receiving Rent Assistance) that are spending at least 30% of their income on private rent after any Commonwealth Rent Assistance that the household receives has been taken into account. At 30 June 2015, there were 1,922 low income households in Noosa Shire that spent over 30% of their gross household income on private rental accommodation (**Table 31**). This was around 52.8% of the total low income households in private rental accommodation at the time. The proportion of low income households experiencing rental stress was around 10 percentage points higher than the proportion for Queensland, and had increased slightly compared to the proportion 12 months earlier.

Table 31. Rental Stress, Noosa Shire and Queensland, 2014 and 2015

Area	30 June 2014		30 June 2015	
	Rental Stress Households	Total Low Income Households in Private Rental	Rental Stress Households	Total Low Income Households in Private Rental
Noosa Shire	1,908 (52.1%)	3,665	1,922 (52.8%)	3,642
Queensland	132,027 (41.6%)	317,273	139,087 (42.5%)	327,308

Notes: Low income households are households receiving Rent Assistance.

Source: Queensland Government 2016f;

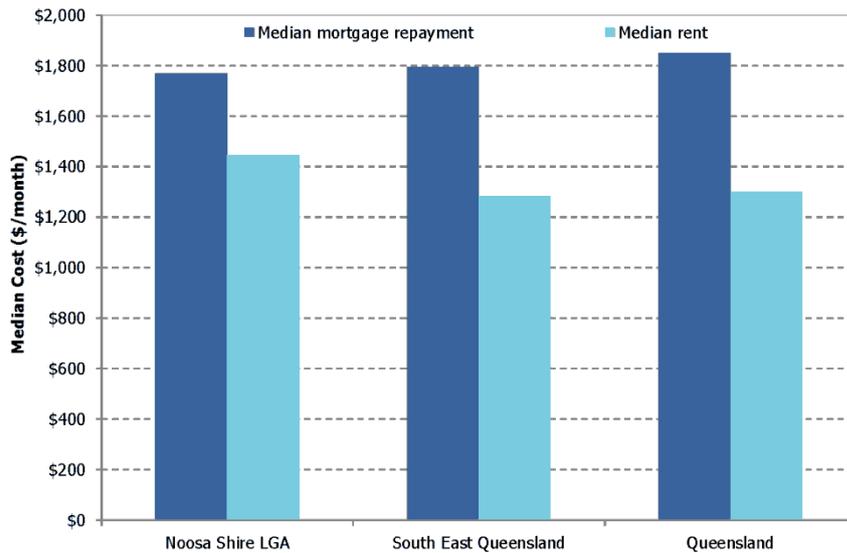
Affordability

Housing affordability refers to the relationship between expenditure on housing (prices, mortgage payments or rents) and household incomes. It uses a measure of median rental cost compared to median income.

Median mortgage repayments at 2011 were lower in the Shire (\$1,770 per month) compared to the SEQ Region (\$1,794) and the State (\$1,850). Median rents were higher in the Shire (\$1,445 per month) compared to the SEQ Region (\$1,283) and the State (\$1,300).



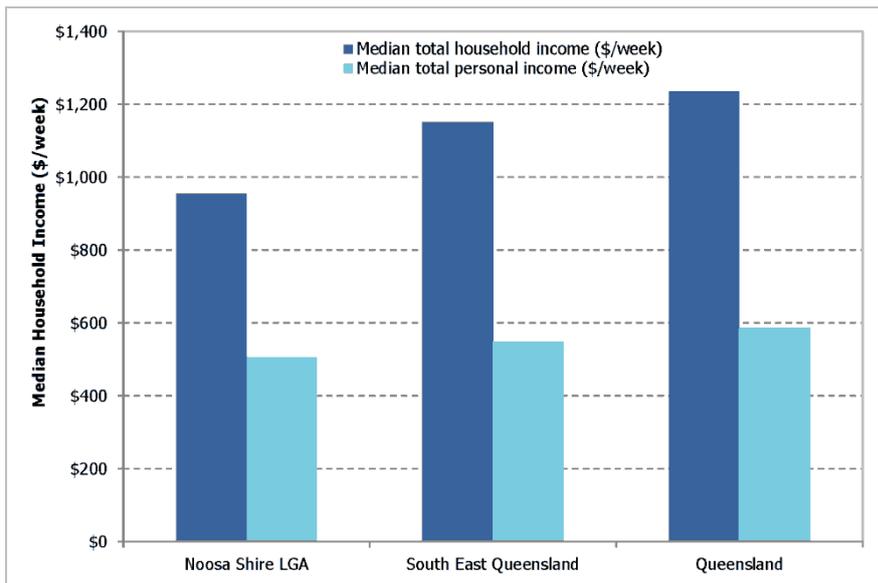
Figure 34. Median Mortgage Repayments and Rents, Noosa Shire, SEQ and Queensland, 2011



Source: AEC Group 2015;

In 2011, the Shire reported a median household income almost \$200 below the SEQ Region's and almost \$300 below the State's in 2011 (\$953.5, \$1,150.7 and \$1,235.0 per week respectively).

Figure 35. Median Household and Personal Income, Noosa Shire, SEQ and Queensland, 2011



Source: AEC Group 2015;

As these median mortgage repayments, rents and incomes are based on the last Census (over 5 years ago), an analysis of affordability in terms of median accommodation costs and incomes was compiled to help bridge the gap until data from the Census 2016 is released. The figures below use a range of assumptions to compare affordability in Noosa Shire, Sunshine Coast LGA, and Brisbane City LGA. Assumptions include:



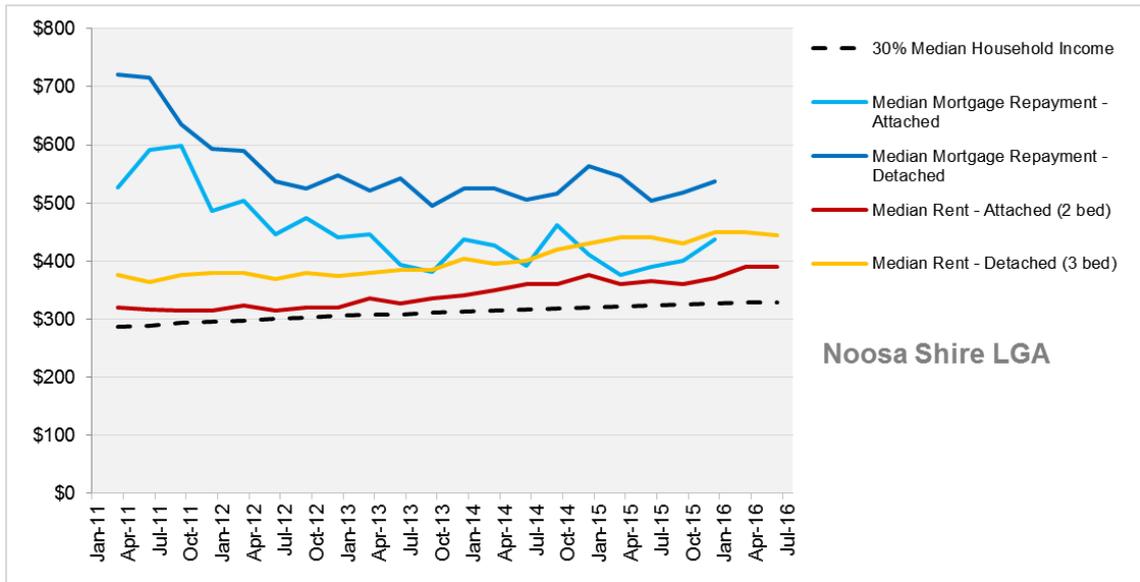
- Median household income – Median household income from the 2011 Census (ABS 2013a) is adjusted each quarter based on the wage price index for Queensland for total hourly rates of pay (excluding bonuses) for all sectors and all industries (ABS 2016 Table 2B A2600949X). The 30% benchmark is used as this is the indicative proportion of household income that is considered reasonable for low income households to spend on accommodation costs without experiencing housing stress.
- Median weekly mortgage repayments for attached and detached dwellings – Median mortgage repayments have been calculated based on the median sale price of attached and detached dwellings in the areas from Queensland Treasury data (Queensland Government 2016e) and average variable bank mortgage rates for owner occupiers as published by the Reserve Bank of Australia (2016) assuming a 20% deposit and 25 year loan period. Weekly repayments assume a month has four weeks.
- Median rents for attached and detached dwellings – Median rents are based on new bonds lodged with the RTA (2016) each quarter and are for two bedroom attached dwellings and three bedroom detached dwellings only.

The results of the analysis are shown in **Figure 36** to **Figure 38**, and a number of observations can be made about the results:

- For Noosa Shire, Sunshine Coast LGA and Brisbane City LGA, median mortgage repayments for attached and detached dwellings generally declined during the start of the period, before levelling off and starting to trend upward during the latter half of the period. The decline was partly due to median sale price declines early in the period, however falling average variable home loan interest rates have also contributed to the fall in median mortgage repayments. The affordability of mortgage repayments is heavily impacted by the variable home loan interest rate charged, including any discounting that is provided (not included in this analysis), and therefore changes in interest rates may quickly change the affordability of the dwellings in the regions analysed.
- For a household earning a median income in Noosa Shire, renting or purchasing a median priced dwelling was unaffordable throughout the time period. Renting a 2-bedroom attached dwelling was the most affordable option throughout the time period. With falling interest rates during the period, mortgage repayments on an attached dwelling became more affordable, and median mortgage repayments on an attached dwelling were more affordable than renting a median priced 3-bedroom detached house at the end of 2015.
- For a household earning a median income in the Sunshine Coast LGA, renting a 2-bedroom attached dwelling was affordable throughout the time period analysed, and purchasing an attached dwelling became affordable in the last 12 months or so.
- With higher median household incomes in the Brisbane City LGA, households have more affordable options when it comes to accommodation – including renting a median priced 2-bedroom attached dwelling, or 3-bedroom detached dwelling, or purchasing a median priced attached dwelling.

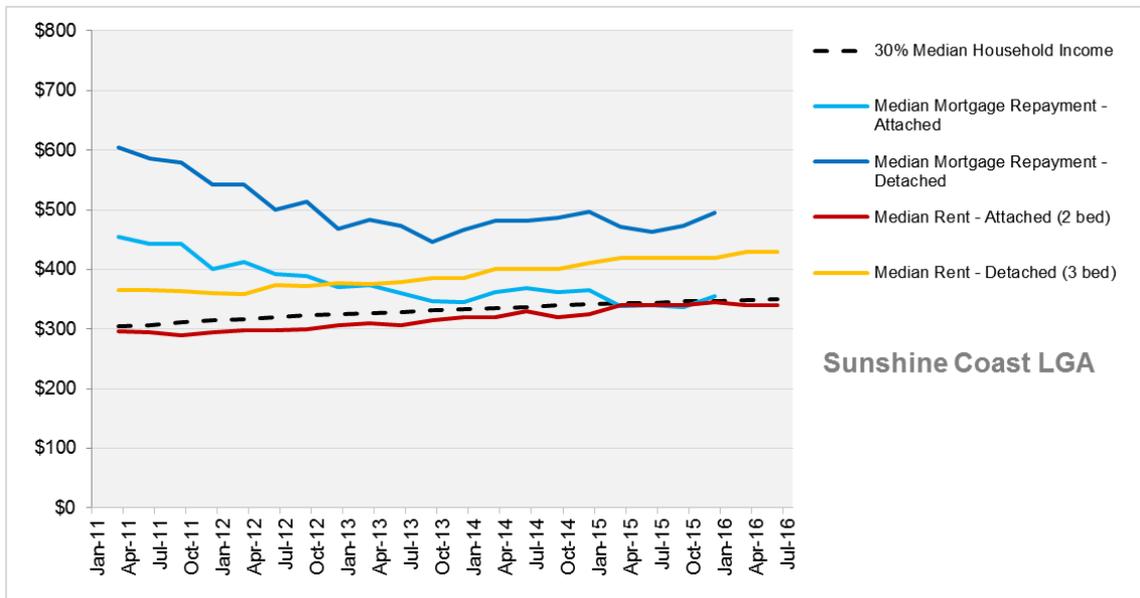


Figure 36. Accommodation Affordability Analysis, Noosa Shire, 2011-2016



Source: Various sources as described; Analysis undertaken by Briggs & Mortar Pty Ltd.

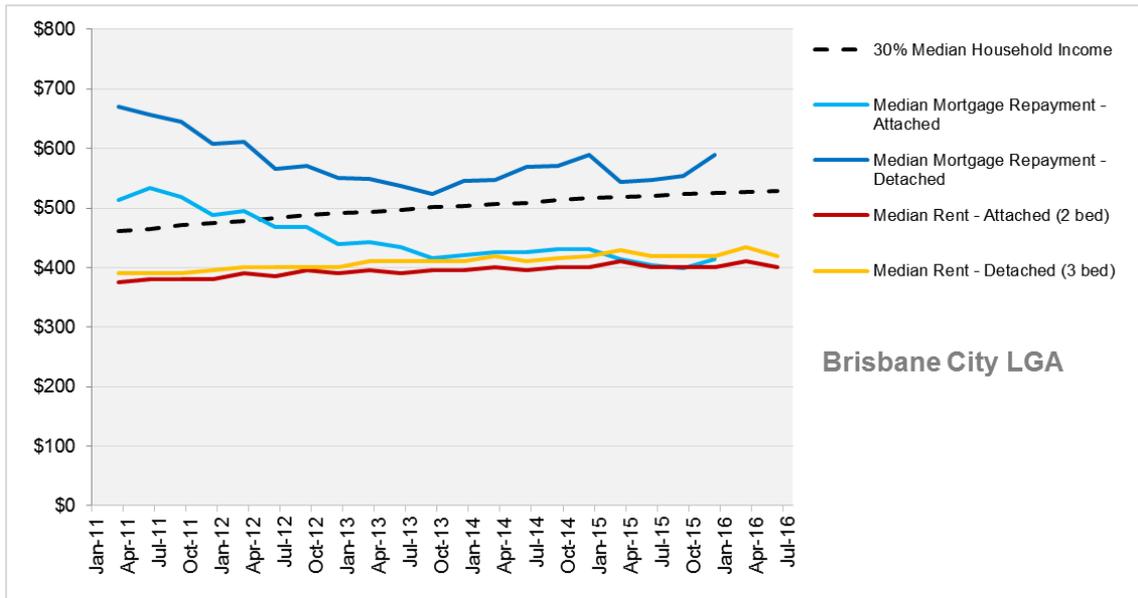
Figure 37. Accommodation Affordability Analysis, Sunshine Coast LGA, 2011-2016



Source: Various sources as described; Analysis undertaken by Briggs & Mortar Pty Ltd.



Figure 38. Accommodation Affordability Analysis, Brisbane City LGA, 2011-2016



Source: Various sources as described; Analysis undertaken by Briggs & Mortar Pty Ltd.

Implications for Housing

There was found to be a very limited supply of public, community and transitional housing available in Noosa Shire. The cost of land, in particular, has limited the ability to provide social housing. The waiting lists for public housing is long, and wait times can be 10 years.

Otherwise the private sector determines the housing product that is constructed and the prices, through supply and demand, and influences household preferences through marketing and availability. The majority of housing developments and land subdivision is undertaken by a small number of development companies in Noosa. There have however been very few large residential developments over the past two decades.

Noosa Shire has been found to be relatively unaffordable for both rental and mortgage repayments relative to median household income. This is compounded not only by high prices, but by the relatively low incomes which characterise many of the key industries in Noosa Shire. This would particularly affect low income households, including single parent and single person households, and young people.

Hence 16% of all low income households who were paying a mortgage were in housing stress at the 2011 Census and 34.5% of all low income households who were renting were in housing stress. This equated to 15.6% of all households in Noosa Shire.

The implication for future housing needs is that measures ought to be considered that lead to new housing having better potential to be affordable. Options include smaller lot sizes or particular density requirements for attached dwellings that reduce costs through a smaller land component or a smaller dwelling.



4.1.4 Key Workers

Characteristics of Key Workers

Section 2.1 identified that Noosa Shire's economic structure is dependent on population driven industry sectors and tourism with retail trade 26% higher than the Australian average; and accommodation and food services almost double the Australian average.

It is well recognised that these industries are among the poorest paid of any industries and have lower full-time employment rates. Part-time work accounts for around 35%-40% of total employment within the broader Sunshine Coast Statistical Area Level 4 (SA4), compared to around 25%-30% in other similar regions (see Section 4.2); and Noosa Shire has considerably lower household incomes than SEQ and Queensland. In 2011, the Shire reported a median household income almost \$200 below the SEQ Region and almost \$300 below the State (Noosa Shire Council, 2015).

Implications for Housing

The lack of accommodation for key workers has long been an issue across the Sunshine Coast. Again the difficulty of obtaining and sustaining housing in an unaffordable market is exacerbated among people with low incomes employed in the key industries of the coast. An additional consideration in Noosa Shire is that these people need to be located in proximity to or with good access at all hours to key tourist and hospitality areas, which places greater premiums on the availability and cost of accommodation.

'Key workers' (or workers in Noosa Shire's key industries) are crucial to the economy. In Noosa Shire they are frequently younger, single people, some of whom are travelling. However some are simply young people living in the Shire or elsewhere on the Sunshine Coast who need their own accommodation. Their accommodation needs are usually fairly basic and small, however location in relation to work and transport is critical. This accommodation is poorly provided at the present time, and accounts for some workers staying in resort accommodation, some in a share situation. There is also considerable inflow to Noosa Shire in terms of workers living elsewhere on the Sunshine Coast.

4.1.5 People Escaping Domestic Violence

Domestic violence is a major contributor to homelessness – 24% of homeless Queenslanders cite domestic violence as the cause (consistent with nationally reported data)¹³. Violence is a major driver of homelessness for men and women. Research shows that 61% of victims are women and 39% are men¹⁴. Violence in the home is also an issue for young people, with one of the three main reasons that young people aged 15-24 years report for being homeless¹⁵. While data is not available at LGA level, these state and national trends are also likely to be reflected in the Noosa Shire.

¹³ Homelessness Australia, undated

¹⁴ Research findings from the 2012 ABS Personal Safety Survey and Australian Institute of Criminology cited in: *Violence Against Women: Key Statistics*, produced by Australia's National Research Organisation for Women's Safety. And: *Male Victims of Family Violence: key Statistics*, produced by the One in Three Campaign.

¹⁵ Mission Australia, 2016



There are 3 x two bedroom dwellings provided in Noosa Shire for victims of domestic violence. Shire businesses, trades people and others volunteered goods and services, labour and time to support the creation of the three safe houses for victims of domestic violence, over just two weekends in 2005. The Safe Homes In Noosa Everyday (SHINE) construction project in Langura Street, Noosa Heads resulted in the provision of the first safe houses for women and children in Noosa Shire. Men may find it particularly difficult to obtain accommodation when escaping domestic violence.

Such services are State funded, and further dwellings would require the provision of land and operational funding.

4.1.6 People at Risk of Homelessness

Homelessness in Noosa Shire

The Australian Bureau of Statistics (ABS) (2013b) estimated that there were 152 homeless people in the Statistical Areas (Level 2) (SA2s) that make up Noosa Shire in 2011. A significant number of the homelessness people were located in the Noosa Hinterland SA2 with a total of 94 homeless people (**Table 32**).

Table 32. Homeless people, Noosa Shire, 2011

Area (SA2)	Homeless Persons
Noosa Hinterland (a)	94
Noosa Heads (a)	10
Noosaville (a)	6
Peregian (a)	3
Sunshine Beach (a)	12
Tewantin (a)	27
Noosa Shire (b)	152

Notes: a = ABS Statistical Area Level 2 (SA2). b = sum of SA2s, closest approximation of Noosa Shire.

Source: ABS 2013b;

The Australian Institute of Health and Welfare (AIHW) compiles a dataset of specialist homelessness services. Homelessness services in Noosa Shire assisted 275 clients in the 12 months to 30 June 2015 (or 51.4 clients per 10,000 population), and 57 clients on average were accommodated on a typical night during the period (or 10.6 clients per 10,000 population) (Queensland Government 2016f). The rate of clients supported with homelessness services was about half the rate for Queensland (51.4 people for Noosa Shire, compared to 110.8 people per 10,000 population in Queensland), however the rate of clients accommodated on an average night was slightly higher than for Queensland (10.6 people for Noosa Shire, compared to 7.4 people per 10,000 population for Queensland) (Queensland Government 2016f).

Table 33. People accessing specialist homelessness services, Noosa Shire and Queensland, Year to 30 June 2015

Projection Area	Noosa Shire	Queensland
Clients support	275	52,962
Clients support per 10,000	51.4	110.8



Nightly average clients accommodated	57	3,513
Nightly average clients accommodated per 10,000 population	10.6	7.4

Source: Queensland Government 2016f;

Notes: Some clients may be supported by multiple providers and may be counted more than once. Statistics include children.

The National Centre for Social and Economic Modelling (NATSEM) created an index to identify areas at a high risk of homelessness using data from the Census, and other data sources. The index is derived from the following four indicators:

- Participation and Education (people aged 18-24 that are not at school or working, young people aged 7-17 not attending school, people aged 25-54 who did not complete year 12 or equivalent);
- Financial need (people receiving welfare payment, people who are in financial stress and poverty);
- Housing stress (people aged over 55 in bottom income quintile paying over 60% of income on rent, people who live in overcrowded conditions);
- Other (one parent families, people living in public housing, domestic violence incidents reported to police).

Based on the indicators, statistical local areas (SLAs) are ranked and assigned to quintiles from highest risk to lowest risk of homelessness for the whole of Australia. Many SLAs within the Noosa Shire scored poorly on a range of indicators that can be used to indicate risk of homelessness. For Noosa Shire, 24.3% of the population was in the highest risk quintile, and 55.0% were in the second highest risk quintile, compared to 23.8% and 20.8% for Queensland (Queensland Government 2016f).

Implications for Housing

The above analysis suggests that in 2013 there were around 150 people in Noosa Shire who are homeless. This number may have increased with deteriorating economic conditions and the increasing unaffordability of housing since.

Noosa Shire was found in Section 3.2.2 to have a small network of service providers who attempt to assist these people. There is however a lack of emergency accommodation in the Shire, which is only partially offset by rural campgrounds, showgrounds etc.

Of equal concern is the high proportion of households who were found to be in the second highest risk quintile for homelessness. The latter is nearly three times the proportion for Queensland as a whole. Many such households will be struggling to make ends meet and are particularly vulnerable to rent increases, job losses etc.

The implication for housing is that further affordable housing must be provided in the Shire to prevent increases in homelessness.

4.1.7 People with Mental Health Issues

People with mental health issues may require special accommodation in the community as an option to inpatient care. The closest options available to people in Noosa Shire are shown below.



Table 34. Accommodation for People with Mental Health Issues close to Noosa Shire

Name	Address	Housing/Services
Graceville Centre, Nambour	5 Sydney Street NAMBOUR QLD 4560	<p>Self Directed Support Program: Offers transitional accommodation options including a fully supported shared house and semi-supported individual units for people living with mental illness and/or intellectual disability. Also offers individualised support to individuals living with mental illness and/or intellectual disability in their own homes in the community. Referral is through Disability Services.</p> <p>Transitional Recovery Program: Offers transitional support and accommodation for those exiting acute care. Also offers individualised support to individuals living with mental illness in their own homes in the community. Referral is through QLD Health.</p> <p>Purpose Designed Housing Program: Offers long term supported accommodation to individuals with intellectual, cognitive or psychiatric disability who have faced barriers in accessing rental accommodation or maintaining a tenancy. Referral is through Disability Services</p>
Partners in Recovery Contact Centre	Sunshine Coast Medicare Local, Level 3, 29 The Esplanade, MAROOCHYDORE QLD 4558	The PIR Contact Centre is located at the Sunshine Coast Medicare Local in Maroochydore. It works with people with a severe and persistent mental illness, their carers, family and friends to find things like housing.
Homeless Health Outreach Team - Sunshine Coast Health Service District	Centenary Square 52-64 Currie Street, Nambour QLD 4560	HHot provides an extended hours, assertive outreach service to people where they reside in the community or where they access food and support through linking people with appropriate community services

Source: Coast2Bay Housing Group 2015; Noosa Shire Council 2016a (Survey Results); Local knowledge of Council Officers and service providers.

No specific facilities were found in Noosa Shire, however outreach services are available to facilities located in other parts of the region. The consultation was not oriented specifically to this issue, but a particular need was not raised by service providers.

4.1.8 Tourists/Visitors

Overview of Tourism in the Region

Noosa Shire Council Community Profile (AEC Group 2015) noted the following about tourism in the region drawing on data from Tourism Research Australia.

- Tourism is one of the Shire's key sectors with an estimated visitor spend of \$601.2 million for the year ending September 2014.



- Total visitation to the Shire declined to 1.7 million (specifically 1,650,218 people) for the year ending September 2014, following strong visitation growth in 2012 and 2013. This represented a 15.5% decline from the previous year.
- Over the year ending September 2014, growth in the domestic overnight and international markets (up 2.1% and 5.9% respectively) was offset by a large decline in the Shire's largest market, the domestic day visitor market (down 27.1%).

Data provided by Tourism Noosa for the year ending June 2016 indicated a substantial return to growth (Figure 39). Visitation for the Noosa region identified a total of 2.2 million visitors, a 15.2% increase on the previous 12 months. This included growth in all three sectors, domestic, international and daytrip markets. The total visitor spend had increased significantly, to \$831.3 million, a 23.2% increase over the previous 12 months.

Figure 39. Tourism statistics, Tourism Noosa, Noosa Shire, 2016



Noosa region visitor statistics - Year ending June 2016

TOTAL	Domestic overnight	International overnight	Day trip
VISITORS:			
2.2m +15.2%	802,630 +12.3%	146,000 7.4%	1.28m +18.1%
NIGHTS:			
4.1m +15.1%	3.2m +20.3%	893,770 -0.2%	
SPEND:			
\$831.3m +23.2%	\$595m +17.1%	\$100.5m +47.4%	\$135.8m +38.1%
SPEND (4yr avg):			
\$718.5m +5.1%	\$535.7m +2.4%	\$74.5m +13.4%	\$108.3m +13.9%

Source: Tourism Research Australia National and International Visitor Surveys, year ending June 2016. 4-year average spend as per LGA profile.

Source: Tourism Noosa, 2016;

This data includes day trip visitors and visitors who stayed with a friend/relative, in a tent or caravan at a caravan park, or a rented house or apartment through a real estate agent or online provider.

Overall, the data indicated that visitors stayed the equivalent of 4.1 million nights in the Shire in the year to June 2016 which was a 15.1% increase compared to the previous year. This equates to an average of around 11,000 visitors in the region per night although this would vary throughout the year.



From the perspectives of housing needs and the local economy, it is important that the accommodation demands of tourists or visitors are taken into account in developing the New Noosa Plan, and are planned for as far as possible given the land constraints in Noosa Shire, in alignment with future needs.

Tourist/Visitor Accommodation

It is difficult to determine the amount of accommodation available to tourists and visitors in Noosa Shire, and accommodation can take a number of forms. These include places of tourism accommodation such as resorts, hotels, motels and bed and breakfast establishments enumerated by ABS, as well as holiday homes, rooms in private dwellings or rental private dwellings used either consistently or occasionally by visitors. The latter are all difficult to identify with any certainty.

Accommodation establishments and rooms

The Australian Bureau of Statistics (ABS) (2015) undertakes a survey of tourist accommodation providers and publishes data at the SA2 level which can be combined to roughly represent the Noosa Shire. The survey only includes tourist accommodation establishments with 15 rooms or more. According to this data there were a total of 49 tourist accommodation establishments in Noosa Shire in 2014-15 offering a total of around 2,000 rooms (**Table 35**). The majority of these rooms were located in the Noosa Heads area (although there are a higher number of smaller complexes in Noosaville).

Table 35. Accommodation establishments and rooms, ABS data, Noosa Shire, 2014-15

Area	July 2014 – June 2015
Accommodation Establishments	
Noosa Heads (SA2)	19
Noosaville (SA2)	23
Peregian (SA2)	3
Sunshine Beach (SA2)	4
<i>Noosa Shire (approximate)</i>	<i>49</i>
Rooms	
Noosa Heads	1,205
Noosaville	655
Peregian	68
Sunshine Beach	73
<i>Noosa Shire</i>	<i>2,001</i>

Notes: Excludes all tourism accommodation establishments with fewer than 15 rooms.

Source: ABS 2015 (cat. no. 8635.0);

In the year to 30 June 2015, these tourist accommodation establishments provided the equivalent of 444,450 nights of accommodation (**Table 36**). This equated to a room occupancy rate of 60.9% for the year, which was a fairly similar room occupancy rate to Queensland at 62.0%.



Table 36. Tourist accommodation (hotels, motels, and serviced apartments), Noosa Shire, 1 July 2014 – 30 June 2015

Area (SA2)	September Quarter 2014	December Quarter 2014	March Quarter 2015	June Quarter 2015	July 2014 – June 2015
Room Nights Occupied in Quarter					
Noosa Heads	72,586	78,829	69,804	58,629	279,848
Noosaville	40,248	37,537	32,502	27,805	138,092
Peregian Beach	3,119	3,622	2,885	2,703	12,329
Sunshine Beach	3,757	4,278	3,487	2,654	14,176
<i>Noosa Shire (excluding Noosa Hinterland SA2)</i>	<i>119,710</i>	<i>124,266</i>	<i>108,678</i>	<i>91,791</i>	<i>444,445</i>
Average Room Occupancy Rate					
Noosa Heads	65.5%	71.1%	64.4%	53.5%	63.6%
Noosaville	66.7%	62.2%	55.1%	46.9%	57.8%
Peregian Beach	49.9%	57.9%	47.1%	43.7%	49.7%
Sunshine Beach	55.2%	63.7%	53.8%	41.1%	53.6%
<i>Noosa Shire (excluding Noosa Hinterland SA2)</i>	<i>65.0%</i>	<i>67.5%</i>	<i>60.4%</i>	<i>50.6%</i>	<i>60.9%</i>
<i>Queensland</i>	<i>67.3%</i>	<i>63.8%</i>	<i>58.6%</i>	<i>58.1%</i>	<i>62.0%</i>

Notes: Excludes all tourism accommodation establishments with fewer than 15 rooms.

Source: ABS 2015 (cat. no. 8635.0);

Data from Tourism Noosa (2016) based on the number of members of the tourism organisation suggests that there may be a number of accommodation establishments that are not included in the ABS data (including small operators). There were 112 members of Tourism Noosa which represents the tourism industry in Noosa Shire (**Table 37**). However, it is difficult to verify the accuracy of the Tourism Noosa data as it is based on people registered with Tourism Noosa and could include operators and owners, and other associated professionals.



Table 37. Accommodation establishments¹⁶, Members of Tourism Noosa, Noosa Shire, August 2016

Area	Accommodation Establishments
Noosa Heads	52
Noosaville	42
Peregian	6
Sunshine Beach	12
<i>Noosa Shire (approximate)</i>	<i>112</i>

Source: *Tourism Noosa, 2016*;

Holiday Homes/Commercial Rental Dwellings

Holiday homes and dwellings are those temporarily rented through the commercial rental market by visitors to the Shire. For clarity, these are termed visitor dwellings throughout this report, as distinct from the types of tourist accommodation above, or accommodation through AirBnB etc, considered below.

There were a total of 1,602 households counted on census night in 2011 that were identified as only including visitors to the Shire (ABS 2013a). In addition, around 4,559 dwellings were unoccupied. A proportion of these unoccupied dwellings may be usually occupied by visitors and a proportion by residents, and therefore this data is inconclusive as to the extent of visitor dwellings in the Shire. However, by comparing the total number of dwellings counted in the census (including dwellings occupied by residents and visitors, and unoccupied dwellings), and comparing this count to an estimate of resident households provided by the Queensland Treasury (based on estimate resident population) (Queensland Government 2016h) an estimate of the number of unoccupied visitor dwellings in the region can be made. This equates to another 2,520 dwellings used by visitors but unoccupied on Census night. The analysis therefore suggests that around 4,120 dwellings in the Shire could be classified as visitor dwellings in 2011.

More recent modelling undertaken by Unitywater using their Demand Modeller and Tracking Tool (DMaTT) (Unitywater 2016) for Noosa Shire suggested that there were 4,781 visitor dwellings in the region in 2014, including 4,777 attached dwellings and 4 detached dwellings. It is understood that the DMaTT methodology likely overcounts attached visitor dwellings, and undercounts detached visitor dwellings (discussed in Section 6.3.4). Using data from the Census it was estimated that there were some 2,017 detached visitor dwellings in 2011 (700 detached dwellings occupied by visitors on Census night, and 1,317 detached dwellings unoccupied on Census night but assumed to be normally occupied by visitors¹⁷).

¹⁶ Obvious non-accommodation providers were omitted from the list of members provided.

¹⁷ This has been calculated in three steps: (1) estimating the breakdown between total unoccupied resident and unoccupied visitor dwellings based on the difference in dwelling counts in the census, and household estimates from Queensland Treasury data, (2) assuming that unoccupied resident dwellings have a similar dwelling mix breakdown to occupied resident dwellings, and (3) calculating the difference between the mix of unoccupied dwellings and the assumed mix of unoccupied resident dwellings.



Short Term Rental Accommodation

There are a range of types of non-commercial¹⁸ Short Term Rental Accommodation, with the most common being in-house visitor accommodation. In this report this has been termed "Short Term Rental Accommodation". Approximately 1700 dwellings or rooms in Noosa Shire were advertised on the largest short term rental sites¹⁹ in August 2016, with by far the majority of these on the eastern beaches, especially Sunshine Beach and Peregian Beach. A large number were also listed in Noosa Heads and to a lesser extent, in Noosaville.

The Holiday Rental Industry Association (HRIA) was launched in February 2013 as a national peak industry body for Australia's holiday rental industry. One of the key objectives of the HRIA is to promote the sustainable development of the industry through enhancing industry standards and promoting self regulation in cooperation with Local Government and other stakeholders.

The industry Code of Conduct has been developed and refined over several years to provide a self regulatory approach in the management of holiday and short term rentals. This approach has been used in some areas and has been found to be successful in managing amenity impacts associated with holiday rentals.

The position of the HRIA is that there is no economic or social utility in having residential accommodation vacant. They identify many social and economic reasons that Short Term Rental Accommodation is required, not simply for holidays, and that there are many beneficial impacts of utilising otherwise unused accommodation.

¹⁸ i.e. accommodation not commercially obtained, e.g. through real estate agents.

¹⁹ Some may be listed on both sites, so counted twice. However there are other similar sites.



Table 38. Property Listings on AirBnB and Stayz, Noosa Shire, 2016

Noosa Plan Localities	AirBnB Listings	Stayz Listings
Boreen Point, Kin Kin and Cootharaba	17	1
Cooroibah	16	6
Cooroy & Lake Macdonald	32	9
Eastern Beaches (breakdown below)	318	458
- <i>Castaways Beach</i>	26	21
- <i>Marcus Beach</i>	64	16
- <i>Sunshine Beach</i>	93	213
- <i>Sunrise Beach</i>	68	42
- <i>Peregian Beach</i>	67	166
Mary River Catchment	31	7
Noosa Heads	202	312
Noosa North Shore	8	18
Noosaville	76	137
Tewantin and Doonan	67	13
Total	767	961

Source: AirBnB and Stayz website searches, 2016.

Some States have examined the issue with varying responses – South Australia (SA) is the first state to permit totally unrestricted short term rental. Tasmania on the other hand is considering a 42 day cap without a permit. Queensland currently appears to have no State wide position on the matter. Various Councils across Australia have also acted to bring in particular requirements.

The HRIA considers that requiring development approval or a council approval process such as that proposed in Tasmania would “decimate the industry”²⁰.

Implications for Housing Provision

The implication of the difficulty in identifying dwellings used for visitor accommodation, and visitor accommodation used for permanent residents, is uncertainty in estimating the true stock of dwellings available to either.

This is significant in terms of estimating future housing and visitor needs. It is known that around 4,777 attached dwellings (in 2014) and around 2,000 detached dwellings (in 2011) appear to have been used by visitors. An approximation of short term rentals can be developed from online advertisements. It is estimated (allowing for double listings) that there could be up to 1,500 of these, or more.

²⁰<http://www.abc.net.au/news/2016-07-26/bid-to-restrict-airbnb-style-home-rentals-under-spotlight/7660982>



There are generally no restrictions on self-contained accommodation being used for visitors or residents in Noosa Shire, except in the few cases where tourist only developments are approved. The current Noosa Planning Scheme provides for Type 1 Home Hosted Visitor Accommodation in detached dwellings. This allows the use of premises for short term accommodation hosted by the resident family within a detached house where there is no more than 6 guests accommodated in no more than three rooms, and at least one bedroom excluded from use by the guests. This includes bed and breakfast establishments.

Restriction of these types of accommodation would have severe implications for the availability of visitor, student and affordable accommodation in Noosa Shire. HRIA considers that social reasons for requiring Short Term Rental Accommodation may include work relocations, temporary stays between home purchases, widows needing to share their house to continue to afford living in it etc. It is also well known in Noosa Shire that there is an extensive student 'home-stay' population living in Noosa, and particularly in Noosa Heads.

The main issue remains that current planning allows a mix of visitors and permanent residents in the majority of resort accommodation, which has not always been built to provide a suitable permanent residential environment. The shortage of smaller, affordable dwellings including studio, one and two bedroom apartments has led to some residents seeking housing in such accommodation. This has led to competition, and in some cases conflict. It has also created difficulties where management rights have been sold in resort complexes and the holiday rental pool has continued to decrease as a result of increasing permanent occupation.

It has additionally created difficulties in the conferencing market where the take-up of visitor accommodation by residents has impacted on the supply of visitor accommodation and the viability of conferencing. At peak times, visitor accommodation is often booked out, and this has the potential to impact on Noosa Shire's tourism economy.

In reverse, unoccupied dwellings used as holiday homes or holiday rentals could be said to remove stock from the permanent residential market. Like short term rentals, holiday rentals can be disruptive to residential amenity, particularly where they occur in semi-attached or attached complexes. Council may wish to consider whether some future developments should be earmarked as 'resident only', by applying a resident only condition of consent. Limited application of this condition may provide benefit to some residents in terms of assuring them of residential amenity.

It will be important to attempt to project future tourist/visitor accommodation needs taking such considerations into account, in order as far as possible to cater for both appropriately and reduce inappropriate mix.

4.2 Benchmarking Housing Suitability and Affordability

To understand the extent of the issues of housing choice, affordability and stress in the Noosa Shire, indicators were developed and compared to other Local Government Areas with similar demographic characteristics. Local Government Areas used in the comparison analysis were:

- Fraser Coast;
- Douglas Shire; and
- Gold Coast City.

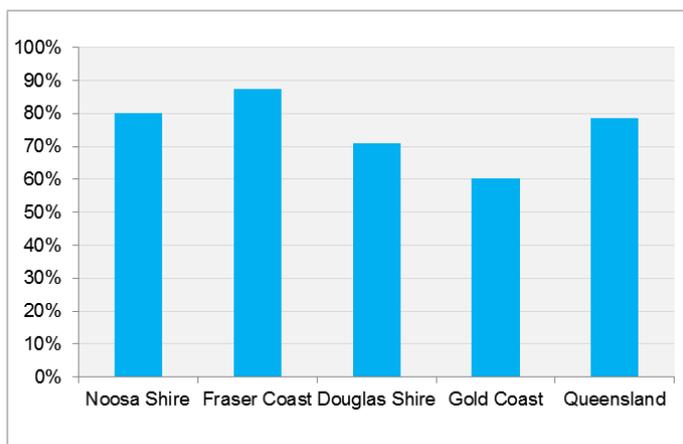


Data for Queensland as a whole was also considered for a broader perspective. An indicator table showing demographic characteristics for the comparison areas and the results of the comparative analysis is provided in **Appendix A**.

These comparative Local Government Areas were chosen because they are popular tourist destinations and/or have similar older populations to the Noosa Shire. However, they do differ from the Noosa Shire in specific ways:

- The proportion of Noosa Shire population 60 years of age and older was around 30% in 2015, while for Douglas Shire, Gold Coast and Queensland, this proportion was much lower at around 20%;
- The Fraser Coast region was significantly more socio-economically disadvantaged in 2011 than any of the other areas – with lower median personal and household incomes, and around 60% of the population living in the most disadvantaged neighbourhoods in Queensland (the bottom 20% of neighbourhoods on the index of relative socio-economic disadvantage). The proportion for Noosa Shire was around 13%, 17% for Douglas Shire and 12% for the Gold Coast;
- While separate houses were the most common dwelling type in all of the areas, Douglas Shire and Gold Coast had much lower proportions of separate houses (80% for Noosa Shire LGA, 71% for Douglas Shire and 60% for Gold Coast) (**Figure 40**). Fraser Coast was the highest, with 87.5%;

Figure 40. Separate houses, Comparison areas, 2011

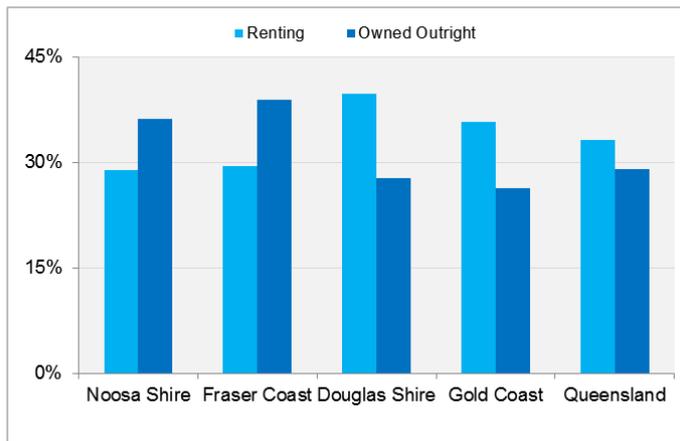


Source: ABS 2013a;

Notes: Excluding unoccupied dwellings, and visitor only, and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.

- Douglas Shire and Gold Coast also had higher proportions of households renting and lower proportions of households who owned their home outright compared to Noosa Shire (**Figure 41**).

Figure 41. Tenure type, Comparison areas, 2011



Source: ABS 2013a;

Notes: Excluding visitor only, and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.

These differences will be considered when comparing the indicators for housing choice, affordability and stress in the next sections. An indicator table showing the results of the comparative analysis is provided in **Appendix A**.

4.2.1 Housing Choice

To simplify the analysis of housing choice, household types and dwelling sizes were grouped as follows:

- Small households – households assumed to require a dwelling with 0-2 bedrooms. This is based not just on the number of people usually part of the household, but adjusted for different household types so that a small dwelling (0-2 bedrooms) would be suitable for them. For example, a couple with one child (3 people resident), and a single parent with one child (2 people resident), are both described here as small households;
- Large households – households assumed to require a dwelling with at least 3 bedrooms.
- Small dwellings - dwellings with 0-2 bedrooms;
- Large dwellings - 3+ bedrooms.

These definitions accord with those adopted in the *State Interest Guideline - Housing supply and diversity*, April 2016.

Three related indicators were developed for housing choice:

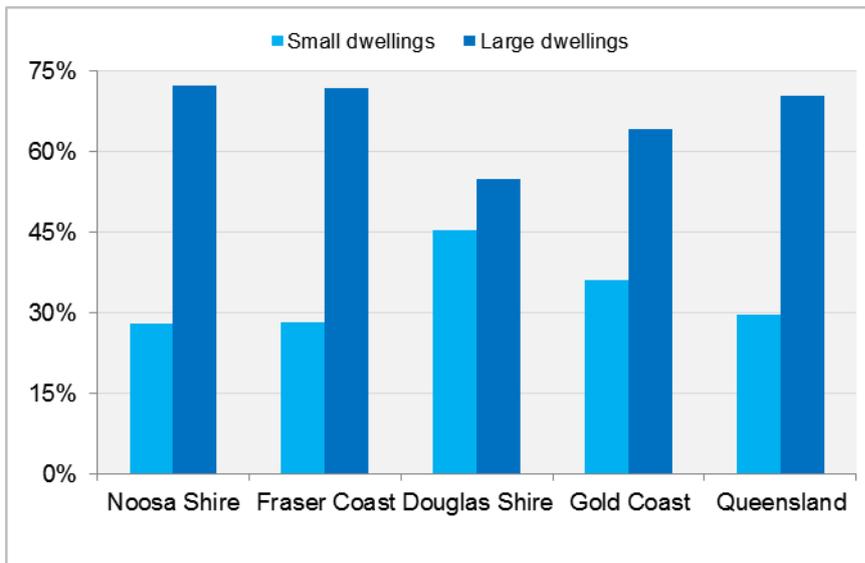
- The proportion of small households living in small dwellings;
- The proportion of small households living in large dwellings;
- The proportion of large households living in large dwellings.

These proportions were obtained from the ABS Census in 2011 and charts showing the comparisons are included below. **Figure 42** below shows that around 72% of small households were residing in large dwellings (with 3+ bedrooms) in 2011 in Noosa Shire. This was similar to the proportion for Fraser Coast (72%), and Queensland (70%), but much higher than for Douglas Shire (55%) and the Gold Coast (64%).



Around 76% of all households in the Noosa Shire were categorised as small households in 2011.

Figure 42. Small households in small/large dwellings, Comparison areas, 2011

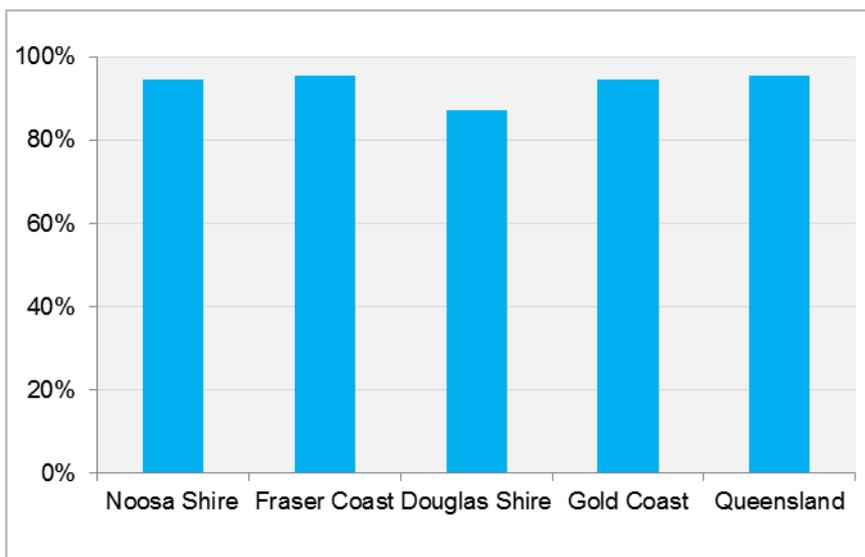


Source: ABS 2013a;

Notes: Excluding visitor only, and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.

Figure 43 below shows that high proportions of large households were living in large dwellings, with around 95% of large households living in large dwellings in Noosa Shire, Fraser Coast, Gold Coast and Queensland in 2011. For Douglas Shire, a lower proportion of large households (around 87%) lived in large dwellings.

Figure 43. Large households in large dwellings, Comparison areas, 2011



Source: ABS 2013a;

Notes: Excluding visitor only, and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.



4.2.2 Housing Stress

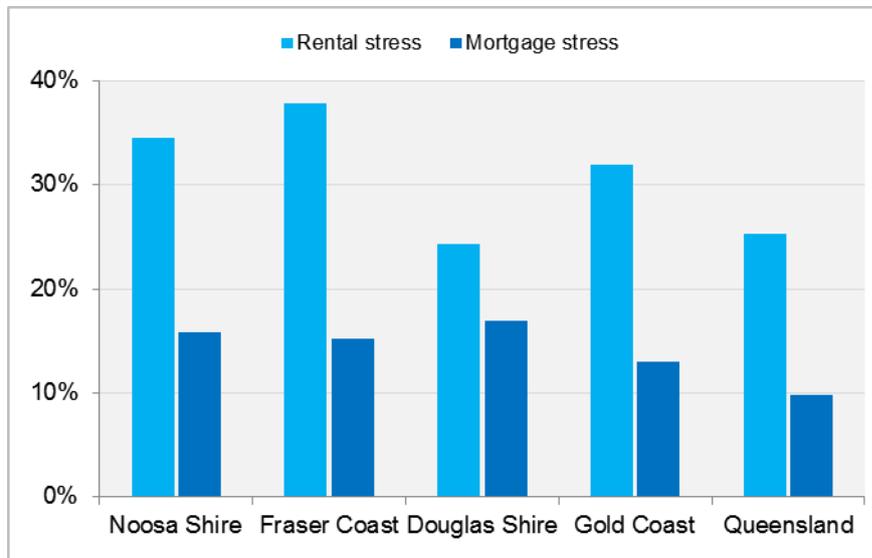
Households are said to be in housing stress when the lowest 40% of income earners are paying more than 30% of their household income on accommodation.

Around 34.5% of low income households who were renting were experiencing rental stress in the Noosa Shire in 2011. This was a lower proportion than for Fraser Coast (37.8%), but higher than Douglas Shire (24.3%), Gold Coast (31.9%) and Queensland (25.3%).

Around 15.8% of low income households who were paying off a mortgage were experiencing mortgage stress. This was comparable to the rate for Fraser Coast (15.2%), lower than for Douglas Shire (16.9%), but higher than for the Gold Coast (13.0%) and Queensland (9.8%).

Unlike the affordability analysis below which provides estimates of affordability for 2015-16 for rental and 2016 for purchase, these figures relate to data from the 2011 census, and therefore do not consider changes in interest rates, dwelling and rental price growth and income growth since that time.

Figure 44. Rental and mortgage stress for low income households, Comparison areas, 2011



Notes: Proportion of low income households in mortgage stress as a proportion of all low income households with a mortgage. Proportion of low income households in rental stress as a proportion of all low income households renting. Noosa Shire and Douglas Shire based on SA2s which do not fully align with the LGA boundary.

Source: PHIDU 2014;

Low income households experiencing either rental stress or mortgage stress made up around 16% of all households in Noosa Shire, the Fraser Coast, Douglas Shire and the Gold Coast in 2011. This was a significantly higher proportion than for Queensland at 12%, but at that time, similar to other key tourist areas.

The affordability analysis below bridges the gap in analysis between 2011-2016 as far as is possible prior to the release of the same data set from the 2016 Census.

4.2.3 Housing Affordability

The methodology for considering housing affordability used in **Section 4.1.3** has been applied again in the comparative analysis to provide indicative data for housing affordability between



2011 and 2016. However, rather than chart the data, four indicators were developed to assist with comparison.

The methodology is briefly summarised below:

- Median household income – Median household income from the 2011 Census (ABS 2013a) is adjusted each quarter based on the wage price index for Queensland for total hourly rates of pay (excluding bonuses) for all sectors and all industries (ABS 2016 Table 2B A2600949X);
- Median weekly mortgage repayments for attached and detached dwellings – Median mortgage repayments have been calculated based on the median sale price of attached and detached dwellings in the areas from Queensland Treasury data (Queensland Government 2016e) and average variable bank mortgage rates for owner occupiers as published by the Reserve Bank of Australia (2016) assuming a 20% deposit and 25 year loan period. Weekly repayments assume a month has four weeks. To reduce variability between data periods, an average of the mortgage repayment over the most recent four periods was used;
- Median rents for attached and detached dwellings – Median rents are based on new bonds lodged with the Residential Tenancies Authority (2016) each quarter and are for two bedroom attached dwellings and three bedroom detached dwellings only. To reduce variability between data periods, an average of the median rent over the most recent four periods was used;
- Affordability indicators – The four affordability indicators are the proportions of income a household earning the median household income would need to spend on renting or purchasing a median priced dwelling (either a unit or a house).

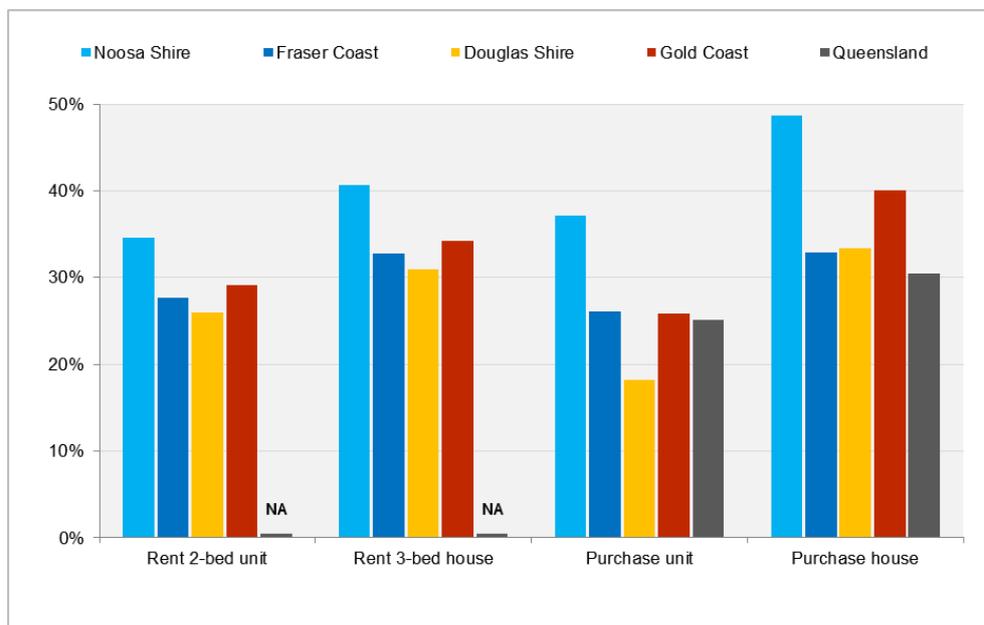
The results of the analysis estimate that in the Noosa Shire, a household earning a median income is estimated to spend around:

- 35% of their income to rent a 2-bedroom unit;
- 41% of their income to rent a 3-bedroom house;
- 37% of their income to purchase a unit; and
- 49% of their income to purchase a house.

These were all higher percentages than for the other comparison areas (Figure 45). Between 5-10 additional percentage points of income are needed in the Noosa Shire to afford a dwelling compared to the next most unaffordable Local Government Area (which for most indicators was the Gold Coast).



Figure 45. Proportion of income on housing costs, Comparison areas, 12 months to Jun 2016 (rent), Dec 2015 (purchase)



Source: Various sources as described; Analysis undertaken by Briggs & Mortar Pty Ltd.

4.2.4 Implications for Housing Provision

The main findings of the benchmarking analysis are:

- Noosa Shire’s housing appears not well suited to its demographic profile. Its housing profile is not dissimilar to Queensland, but its population is very different. Hence:
 - A significant proportion of small households are living in large dwellings (with 3+ bedrooms) in Noosa Shire (72%), higher than all comparatives other than Fraser Coast;
 - Noosa Shire has a higher proportion of separate houses, compared to other dwelling types than all comparatives.

It is however noted that particularly in an affluent community, a proportion of households may choose to live in larger dwellings than seemingly required, or this may be a circumstantial outcome.

- Housing stress is high in Noosa Shire compared to Queensland, but similar to comparative LGAs:
 - At 34.5%, the proportion of low income households that are renting and experiencing rental stress is higher than other comparative LGAs (except for Fraser Coast), and higher than Brisbane or Queensland;
 - 15.8% of low income households that are paying a mortgage were experiencing mortgage stress, similar to the other comparative LGAs, but significantly higher than Brisbane or Queensland;
 - Low income households experiencing either rental stress or mortgage stress made up around 16% of all households in Noosa Shire, the Fraser Coast, Douglas Shire and

the Gold Coast in 2011. This was a significantly higher proportion than for Brisbane with 11.3% or Queensland with 12%.

- Noosa Shire appears less affordable than comparative LGAs. Accommodation affordability is impacted by both low median incomes and high median accommodation costs, e.g:
 - Compared to Fraser Coast, Noosa Shire has a higher median household income, however median priced dwellings are around \$200,000 more expensive to purchase compared to the Fraser Coast, and around \$150 per week more expensive to rent;
 - Compared to Douglas Shire, and Queensland, Noosa Shire has lower median household incomes and higher median prices;
 - Median dwelling rental and sale prices are similar for the Gold Coast and Noosa Shire, however the median household income for the Gold Coast is around \$230 per week higher.
 - Between 5-10 additional percentage points of income are needed in Noosa Shire to afford a dwelling compared to the next most unaffordable comparative LGA considered (which for most indicators was the Gold Coast).

It can be concluded from the above that some of the issues associated with housing suitability and affordability are common to other retirement/tourist destinations. However Noosa Shire rates above the comparatives on nearly all indicators.

A higher rate of provision of smaller dwellings that are suitable for smaller households could provide additional housing choice and help to address affordability issues which are widely experienced in the community. Strategies to address affordability by growing incomes may be limited by the ageing population, with the proportion of people aged 60 years and over projected to increase to around 38% at 2036.

It will also be important that the New Noosa Plan considers the need for affordable living, which includes the cost of transport and other expenses, when locating more affordable housing.



5. CONSULTATION

5.1 Consultation Undertaken

One on one consultation was undertaken with 25 individuals or organisations. These were divided into a number of target areas to gain a cross-section of opinion. These were:

- Groups providing housing for special needs, including social and community housing providers, emergency housing providers, and charitable organisations;
- Providers of tourism or visitor accommodation;
- Real estate agents;
- Property developers;
- Aged Accommodation providers.

Discussions were also held with the following Government departments:

- Department of Housing and Public Works;
- Department of Communities, Disability and Child Support;
- Department of Infrastructure, Local Government and Planning; and
- (Australian) Department of Human Services.

Records of consultation have been provided separately to Council. A summary of findings is provided below.

5.2 Summary of Findings of the Consultation

The key outcomes of the consultation process in each of the target areas are as follows. The comments or suggestions made have not been vetted or altered, and they cannot be relied on to be correct. However they reflect the views and beliefs expressed by those consulted.

5.2.1 Housing for Specific Needs Groups

Key Needs in Noosa Shire

Any affordable housing is what is needed in Noosa Shire, particularly for three groups:

- Key workers in the hospitality industry who are often underemployed and not on full-time wages;
- Lower income families with children, who often cannot afford to live in the area;
- Older people, especially those who are renting, and suffer among the worst housing stress in Noosa Shire.

Other than affordable housing, the other big need is for aged accommodation. One to two bedroom units are very hard to come by, and there is seen to be a major problem on the horizon with the projected increase in aged population.

Rental housing in Noosa Shire is not considered affordable for the average family and there is not a lot of community housing in the Shire. More crisis accommodation and more domestic violence refuges are also required.

Types of Dwellings/Accommodation Needed

There needs to be a range of affordable housing provided:



- One bedroom units for older single people, preferably not in resort complexes;
- Single person accommodation with a communal kitchen for key workers;
- Duplexes for families;
- Two to three bedroom houses;
- Some larger houses for families.

There is concern by social housing providers that the amount of affordable housing available will further decrease when the 10 year tax rebate period for housing developed under NRAS expires, expected in 3 to 8 years time in Noosa Shire. At this time, rents that are currently discounted to 80% of market rent will return to the full market price, and this will create a surge of people looking for more affordable housing. It is also considered likely that affordability issues may magnify over the next few years as property prices increase in Sydney and Melbourne. This brings cashed up buyers to Noosa Shire.

There are very few housing options available for service providers to place people who are homeless or at risk of becoming homeless. There are homeless support workers in Nambour, but none in Noosa Shire, and providers consistently report being unable to meet the need for supported accommodation. More SHINE houses are required, and incentives for developers to build this type of accommodation.

Key Criteria

Location is considered to be as or more important than the dwelling. A lack of affordable housing can mean that people have to move to outer areas of the Shire, often meaning a loss of social supports and poor access to services. Affordable accommodation must be near transport and services. Apartments in town centres would be appropriate for some, including older people.

It is not just affordable housing that is the issue, it is also affordable living, and there are multiple issues involved.

At least one service provider is now not headleasing properties to provide homelessness services in Noosa Shire as they have found that they are unable to provide affordable exit options in Noosa Shire for permanent accommodation.

Barriers to Provision

The issue of lack of affordable housing is not just geographically isolated to Noosa Shire, it is a national issue. The imbalance between supply and demand is the most significant barrier, particularly because Noosa Shire is a holiday destination. The greatest single barrier is considered to be land price, and that this difficulty will exacerbate over the next decade. If the land costs a minimum of \$400,000, developers will build an expensive house to justify the cost of the land.

The issue for service providers is also not enough services to cater for demand, and the lack of options to place people in emergency or crisis accommodation in Noosa Shire. There is also considered to be a NIMBY attitude to social housing, both to placing people in affordable rental properties and the potential to create a ghetto type effect by building new affordable housing.

Some service providers are interested in exploring opportunities about the provision of housing under the NDIS. However the model is currently not well enough developed to understand how it may affect housing needs.



Planning Scheme Barriers

It was considered difficult to innovate with dwelling type in Noosa Shire. However service providers were unable to provide specific detail. It is also considered difficult to grow the supply of community housing because of land cost, the size and configuration of lots, and density restrictions.

Other Comments or Suggestions for Council from the Consultation

There are seen to be opportunities which have arisen from NRAS, although further funding of the scheme by the Australian Government is presently unlikely. Service providers feel that developers are now more willing to explore opportunities to participate in projects which provide a proportion of community housing properties to headlease. Given the lack of State and Federal policy in the area, facilitating the private market to capture the opportunities is considered important.

While incentives could be considered, the issue that a community housing project would revert to the open market once the headlease period was completed appeared problematic, as does the need for Council to fill the infrastructure charges gap should a reduction in charges be provided for this type of development. It was considered that incentives may be more applicable on an individual site basis rather than as a broadbrush zoning approach. Councils can sell off land to developers and put conditions on it that require the provision of a proportion of social housing. Council could give planning incentives for smaller housing in suitable areas. Outer areas like Pomona would be fine as long as they have transport.

Available beds for low-cost accommodation are being taken away by people renting rooms on AirBnB. There is considered to be a possibility of a housing provider becoming the honest broker to rent out a bedroom to low income tenants in similar fashion to AirBnB.

5.2.2 Visitor Accommodation

Competition for Visitor Accommodation

Permanent residents living in resorts constitutes a widespread problem for the tourism industry. The issues are deemed to be twofold:

- Loss of units from the letting pool and the erosion of management rights and income which have been bought by the managers. This particularly affects small blocks where for instance the removal of three units constitutes the loss of a quarter of annual income and a higher than proportionate loss of capital worth. It can mean loss of control of the units and downgrading of the resort itself.
- Depletion of available tourist accommodation across Noosa. One owner considered that in 5 to 10 years there would not be enough tourist accommodation in Noosa if the trend was allowed to continue. This was seen to potentially have far-reaching effects across all sectors such as suppliers, tour operators, restaurants etc and could significantly alter the most important industry in Noosa Shire.

Resort owners appear to believe that the solution is to manage the problem and to work to increase returns through holiday letting. Rezoning other resorts for tourism only, was not



considered to be a solution, as there would be an outcry from owners, whose units are worth one third more if they are permanent than tourist²¹.

Types of Households/People Seeking Permanent Accommodation in Resorts

Many permanent residents are simply average people seeking small affordable accommodation, and include, particularly in one case, a large number of older people. Many people seeking low-cost accommodation are said to be on welfare benefits.

For some people, resort units have been cheaper than a retirement village, and some agents have sold one of the larger resorts that way, i.e. as a gated, managed, safe community for older people.

Issues of Visitor/Permanent Conflict

Permanent residents can create image problems for tourism, particularly those who ignore body corporate rules. In some situations permanent residents experience noise, have clashes with tourists and impose demands on managers that are not their responsibility (such as when an elderly resident has an emergency at night). One resort experienced younger people in a rental unit in the past and these caused clashes with both tourists and older residents. Rental units are difficult to control because they are not the manager's tenant and the real estate agent are not on the ground. In the words of one manager, "there are always problems; the two don't mix".

The letting of some units through AirBnB can also create difficulties for management and guests. Owners of these units do not contribute to costs such as running the courtesy bus, and it is both difficult and confusing to advise guests that they are not entitled to all the services of the resort.

The reduction in numbers of tourists can make it difficult for a restaurant to survive, and other services offered by the resort. Many managers have been fighting back to reclaim units lost from the letting pool. This has become easier as holiday occupancies have increased and it can be shown that holiday letting is more profitable than permanent letting.

A range of people may seek accommodation on AirBnB or similar websites for a variety of reasons. The Holiday Rental Industry Association considers that Short Term Rental Accommodation such as this fulfils a legitimate need and while there may be some issues, there are likely to be significant social and economic benefits as well.

Extent of the Issue

The extent of the problem has been described by some resort owners as 'massive'. The majority of resorts affected are in Noosaville, because they are more affordable to purchase or rent. The issue appears to occur across the board, from large resorts to small blocks of say 12 units. One resort was said to have lost its business completely because it could no longer operate as a resort with only two units holiday let.

Most of the main resorts can relate that the number of units let to permanents has decreased in the last two years. 2008 to 2012 was the worst period, when the GFC affected people and decreased tourism. Australis Noosa Lakes resort is the highest, with approximately 50% permanent; however this is slowly being reclaimed. There is now only one at Noosa Blue Resort, owned by the same owner, now reduced from 15 six months ago. Likewise South Pacific now has

²¹ Note this cannot occur retrospectively.



approximately 50 of the 104 units permanent; whereas when the current manager took over there were less than 30 in the holiday letting pool.

Small resorts often have just one, or a couple of units let permanently.

Any Comments or Suggestions for Council from the Consultation

Given that most resorts or accommodation establishments are strata titled, many considered (and had been advised) that there was nothing Council could do to fix the problem. The solution offered by several owners/managers was that alternative affordable housing (and land for it) must be provided in order to overcome the issue.

Comments were received to the effect that Council needs to have a positive attitude to move Noosa Shire forward, and that tourism won't thrive forever unless it progresses and such issues are addressed. As part of these, it is seen as necessary that Council has an 'open for business' attitude.

Tourism Noosa would very much like the resorts protected and definitely concerned about the issue. They do consider that the proportion of permanents across all resorts is however quite small. Accommodation is nevertheless known to be at capacity every weekend and during the holiday periods. Their focus is therefore increasing mid week visitation, and to improve the product to attract high yield markets.

They see the need to provide new product in the market, and would like Council to work more collaboratively with developers to provide this. Some existing accommodation establishments could be redeveloped even if strata titled, but this takes a lot of time and hard effort. Vacant land is seen to be a challenge, but there is seen to be great opportunity for higher density at Noosa Junction. Provision of accommodation in the Junction for key workers and as an option for those seeking affordable accommodation in the holiday resorts, is considered important.

5.2.3 Student Accommodation

Current Student Accommodation

At any one time the Lexis English College in Noosa Junction has 300 students who stay for an average of 12 weeks. They are accommodated through a mix of Homestay, the most popular accommodation option and four student houses owned by Lexis in Noosa.

Issues

No one caters for this length of stay in terms of accommodation in Noosa - most rental leases on the open market require a minimum of six months.

While they have few issues with the Homestay program, the main issue from their point of view is that they have to offer students a cottage industry of sub-standard accommodation at inflated prices. The situation is a million miles from ideal as far as they are concerned. In all other locations there is much greater availability of student accommodation. In Byron Bay for instance, they have built 80 beds on site; there is ample student accommodation within walking distance in Brisbane; in Maroochydore they can access the University market.

Unmet Accommodation Needs

There is a desperate requirement for private accommodation for students and they are losing students to Noosa because they can't provide it. There have been various proposals in the Junction, and they get a lot of offers; however they all fall over because of planning restrictions.



They would like to see an educational/retail facility on the ground floor with accommodation above in the commercial area of Noosa Junction.

The college would still use Homestay if this was provided – their experience elsewhere has been that for every bed they add they attract a new market.

Barriers to Provision

The main barriers to provision of suitable accommodation have been:

- No conversation or attempt to understand the problems and develop planning solutions - just a flat 'no'.
- Length of approval processes.

Planning Scheme Barriers

Two planning scheme barriers were identified:

- The way parking is calculated for student accommodation - none of their students drive however Council insists on requiring normal parking provisions;
- The need for increased height in Noosa Junction. This would also provide a night economy to bring it alive at all times. The current height limit is a barrier to redevelopment being viable.

Other Comments or Suggestions for Council from the Consultation

They originally envisaged the Noosa school to take up to 1000 students. However they have walked away from this because it is simply 'too hard' to do business in Noosa Shire. It has been easier to start again in another place than try to expand in Noosa, and this is what they have done.

5.2.4 Real Estate Market

Types of Product that Cannot be Provided

A major shortage of accommodation for sale was identified by all agents at the lower end of the scale. It was also identified that rental stock has been slowly decreasing as there is less investment housing, and there is no such thing as rental affordability in Noosa.

Product identified as required included:

- Small units for key workers, with good access to facilities and/or transport, such as in Noosa Junction;
- Low set units, with two or three bedrooms and two cars;
- Accommodation on one level, e.g. villas, for older people;
- Townhouse development in small, pet friendly complexes with low maintenance, low body corporate fees and no holiday letting;
- Affordable duplexes either on transport, or where transport might be improved if the population increased;
- Peregrian style homes for rent in the Noosa area (three to four bedrooms) on 415m², so that young families can take advantage of the schools, contribute to the economy and be part of the community in Noosa. These need to be \$550 per week maximum, so it is important that cheaper land is found;



- Some alternative accommodation such as backpackers and caravan parks so there can be a mix of people living in the area.

Types of People/Households with Unmet Needs

Most of the unmet needs are for older people (especially single women but also couples), hospitality workers, first home buyers and small to medium families. There is no affordable rental stock (below \$350 per week) available in Noosa; it is either holiday rental or very bad quality. Rental accommodation in resorts has however decreased as the holiday letting market has pushed up occupancy rates. It is usually young couples seeking rental accommodation in resorts, sometimes those in hospitality, to be close to Hastings Street.

Some people looking for affordable rental properties, including single parents and elderly people, go to the hinterland, particularly Cooroy. However affordable properties (minimum rent \$460-\$480 per week for a three bedroom house) go quickly. People still like their space if they come out to the hinterland, and one agent had difficulty renting villas. There is also not much work in Cooroy.

First homebuyers have been priced out of many areas of Noosa such as the Eastern Beaches and to find a house under \$500,000 they would have to go to Tewantin or Cooroy. Older people have difficulty finding an alternative to the McMansion. They want to downsize to a one level villa or a two level duplex if it has a master bedroom downstairs. The latter can be counted on one hand and are in very high demand.

Barriers to Provision

The main barrier to provision is the lack of land. Noosa is landlocked and there is no land available for subdivision or for units – only pockets. A need was seen for 200 to 300 lots by one agent, not 20 or 30. No land was also seen to mean no rental stock, so lower income earners have to travel at least as far as Peregian, and then drive to and from work, an added expense for this demographic.

It was noted by one agent that for the second month in a row there was not a single house marketed for sale in the Noosaville river precinct, and there have only been four or five house sales on the market this year. One agent believed that developers have now been priced out of the Noosaville duplex market because the cost of the land does not allow them to make a profit. Many of the old character fibro beach shacks are being pulled down in Sunshine Beach to provide sites for redevelopment.

As a result of there being a lack of alternative places for people to invest money these days and get a reasonable rate of return, there is a dual effect of increasing demand for property as well as decreasing supply because owners see no better value outside the property market.

Planning Scheme Barriers

Real estate agents generally appeared to find the Noosa Plan quite workable. Height, setbacks and site coverage were generally considered appropriate. Planning scheme barriers identified included:

- The lack of dual occupancies - no choice other than to allow this in Noosa, and it will be the least problematic solution;
- The lack of areas where affordable duplexes can occur – dual occupancies may not be possible on 600 m² blocks such as in Tewantin;



- The lack of standard subdivision blocks.

Other Comments or Suggestions for Council from the Consultation

One agent thought that more and more people will buy places in resorts or visitor accommodation. In 20 years he believes it will all be used by residents. Neither are there any large sites for resorts left. This may lead to Council having to make some hard decisions that will not be popular. Major new land releases e.g. Cooribah to Boreen Point would stimulate new building and the economy, and provide employment for young people to live in Noosa.

Affordable rental accommodation for small to medium families (up to \$520 per week for a house with a backyard) is in short supply. This is a shame, because Noosa has great schools, but young families can't afford to live here. Older people on a pension and those on welfare simply can't afford to rent in Noosa.

It is essential that more land - affordable land - is released in Noosa in order to attract younger families and stop the ageing of the population.

5.2.5 Property Development Market

Types of Product that Cannot be Provided

The main product that is unavailable in Noosa is land. It is becoming harder and harder to get a block of land for development and if you find a duplex site it will be over \$1 million. Even if the zoning allowed you to build four units (which it doesn't and which would mean three storeys) the sale price would still be \$1 million, which is not affordable.

Noosa needs smaller affordable dwellings:

- Close to shops and transport;
- 'Pet Friendly';
- 150m² – small, two bedroom, one bathroom plus a downstairs toilet;
- Low Body Corporate payments – unlike resorts;
- Low maintenance;
- One garage;
- Fenced courtyards and balcony;
- Air conditioned;
- Attractive to investors for rental.

Affordable dwellings are harder to provide in Noosa than other areas. They can't be provided if you have to demolish a house to provide the land – the price becomes prohibitive. There is no affordable land so developers can't provide affordable housing. The cost of building the dwelling is increasing too.

Types of People/Households with Unmet Needs

The bottom end of the market is simply not provided for in Noosa.

Many younger people are coming in, as the older ones vacate their larger homes. They are looking for smaller cheaper new homes (under \$450,000) on which they can get the first buyers grant.

Older people are a major market which is not provided for, particularly older single women.



There appears some need for accommodation for key workers; however many of these are also transient and mobile.

Barriers to Provision

The land availability and the zoning are the key barriers to smaller, more affordable dwellings being developed. The only options to get more land are to pull things down or go higher.

Dual living is not allowed here like the Sunshine Coast. However there is very little land in Noosa for dual occupancies. There can also be a problem with regard to parking. There are some streets in Sunshine Beach for instance where on weekends cars are parked on footpaths and narrow streets to dangerous proportions etc. Most occupants have 2 not one car. There are some concerns about 'ghettoisation' with affordable housing.

There are also very limited zones for duplexes in Noosaville and Noosa Heads.

Planning Scheme Barriers

Planning Scheme barriers identified include:

- Small lots are not allowed. If blocks of land are bigger you must do a bigger house to make it viable;
- Infrastructure charges are the same for infill sites as greenfield but they are often harder and more expensive to build on;
- Some resorts which would make good residences are not allowed to be sold for permanent residency e.g. the large Viridian Villas;
- Developers won't do 'tourist only' developments because they are not profitable;
- Engineered solutions to basement car parking in flood prone parts of Noosaville e.g. Mary Street, to enable viable redevelopment with affordable housing on top of commercial;
- The time taken for approvals and the difficulty of the approval process discourage developers;
- The small dwelling provisions appear not known by most developers.

Some incentives could be provided to encourage more affordable housing for example:

- Relaxation of staggered setbacks;
- Simplification and relaxing of the regulations to get medium density development in the right places;
- A change of attitude of assessors and the culture of Council to encourage development.

Other Comments or Suggestions for Council from the Consultation

Council needs to determine first what we want Noosa to be. It must be recognised that a balance of accommodation for tourists and residents is crucial, because without tourism the economy would collapse. There are concerns about substandard accommodation being offered to tourists, and our accommodation no longer being competitive.

Several developers expressed the view that Noosa was busy enough now and did not need expansion beyond the urban footprint. If it is in the footprint it should be made easier to develop.



5.2.6 Aged or Disability Accommodation

Types of Product that Cannot be Provided

There is a great need for housing for older people in Noosa Shire. It has one of the oldest populations in Australia, and the impact of a lack of suitable accommodation is compounded by inflationary impacts on housing costs and a high level of pensioners. Older people must be provided with appropriate housing that they don't need to move from again whatever their situation. It does not however appear possible to provide a variety of low-cost accommodation on a single site, for example housing for older people, social housing and people with a disability.

Barriers to Provision

One of the main barriers to providing aged accommodation is the cost of the land and the cost imposed of planning restrictions, as well as infrastructure charges. It is hard to build something affordable. A small unit may not suffice for people with a mobility disability who need space to move around.

The ownership structure is a barrier to working in the disability space. The problem is if they are strata titled and sold on they are lost to the open market.

Noosa Shire is also considered one of the more challenging councils to do business. A lack of support by Council was seen to exist for a product needed in the area. The planning scheme was seen to be a tool to prevent, not facilitate development. This means that aged care providers find it easier elsewhere.

Planning Scheme Barriers

The main perceived barriers are:

- High infrastructure charges which render aged or community housing unaffordable;
- The length of time of approval processes which also add to the cost of the development;
- Seemingly arbitrary or excessive development requirements which are imposed.

Other Comments or Suggestions for Council from the Consultation

One aged care provider would like to see Council require a certain proportion of units to be built to disability standards.

If Council could consider in its approval process for general housing development that a proportion be made available to a Community Housing provider for affordable housing that would give weight to the policy intent of Councils generally. Perhaps incentives or fast tracking for such proposals may not compromise the planning scheme but rather bring the issue to the forefront of developers as they plan.

Affordable housing may be possible in places like Pomona if it is allowed to grow; however it would only be suitable with concurrent growth in services like transport and local employment.



6. POPULATION AND DEMOGRAPHIC TRENDS AND FORECASTS

6.1 Analysis of Development Trends

6.1.1 Development Activity – Dwellings

Noosa Shire Council compiled dwelling approvals data between 1 July 2011 and 30 June 2016. The data has been analysed to give an indication of development activity as well as the change in dwelling numbers and types in the years since the 2011 census. The data is summarised in **Table 39** below. The table includes dwellings demolished (or removed or reclassified), new dwellings and net dwellings, by dwelling type and locality.

In the five year period between 1 July 2011 and 30 June 2016, 1,325 net additional dwellings were approved by Noosa Shire Council, including 1,218 houses, 101 units (including secondary dwellings), 2 semi-detached dwellings and 4 cabins.

Of the 1,325 net dwellings approved, 391 dwellings were approved in the Noosaville and Doonan locality (30%), 263 dwellings were approved in Noosa Heads (20%) and 222 dwellings were approved in the Ridgewood to Tinbeerwah locality (17%).



Table 39. Dwelling Approvals (including Demolitions) by Dwelling Type, By Locality, Noosa Shire, 1 July 2011 to 30 June 2016

Locality	Dwellings Demolished/ Removed/ Reclassified					New Dwellings					Net Dwellings				
	Separate House	Semi-Detached	Flat, Unit or Apartment (a)	Caravan, Cabin, Houseboat	Total	Separate House	Semi-Detached	Flat, Unit or Apartment (a)	Caravan, Cabin, Houseboat	Total	Separate House	Semi-Detached	Flat, Unit or Apartment (a)	Caravan, Cabin, Houseboat	Total
Boreen Point, Kin Kin, Coothara					0	52		3		55	52		3		55
Cooribah	-1				-1	49		16	1	66	48		16	1	65
Federal to Ringtail Creek					0	103	2	4		109	103	2	4		109
Noosa Heads	-6	-2			-8	227		44		271	221	-2	44		263
Noosa North Shore					0	9		1		10	9		1		10
Noosaville and Doonan	-5	-3			-8	392	5	2		399	387	2	2		391
Ridgewood to Tinbeerwah	-1				-1	200		23		223	199		23		222
Sunshine to Peregian	-7	-4			-11	97	2	3		102	90	-2	3		91
Tewantin	-2				-2	111	2	5	3	121	109	2	5	3	119
Total	-22	-9	0	0	-31	1,240	11	101	4	1,356	1,218	2	101	4	1,325

Note: a = Relative's apartments, annexed units, dependent accommodation, secondary dwellings etc. have been classified as attached dwellings (flats, units or apartments).

Source: Noosa Shire Council 2016b (Data);



The number of net dwelling approvals has trended upwards slightly since 1 July 2011 (**Table 40** and **Figure 46**). Over the past few quarters around 70 dwellings have been approved each quarter.

Table 40. Dwelling Approvals by Year, Noosa Shire, 2011-12 to 2015-16

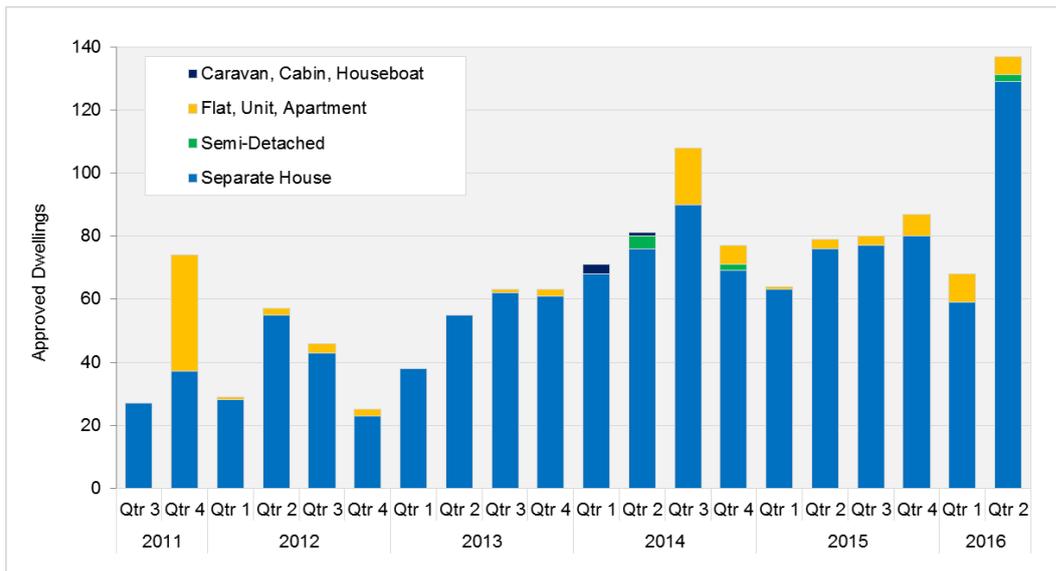
Dwelling Type	Date Unknown	2011-12	2012-13	2013-14	2014-15	2015-16	Total
Separate House	2	147	159	267	298	345	1,218
Semi-Detached	0	-2	0	4	-2	2	2
Flat, Unit or Apartment (a)	0	40	5	3	28	25	101
Caravan, Cabin, Houseboat	0	0	0	4	0	0	4
Total	2	185	164	278	324	372	1,325

Note: Negative numbers result from dwellings being demolitions or converted (for example, a duplex being converted to a separate house).

a = Relative's apartments, annexed units, dependent accommodation, secondary dwellings etc. have been classified as attached dwellings (flats, units or apartments).

Source: Noosa Shire Council 2016b (Data);

Figure 46. Dwelling Approvals by Dwelling Type, Noosa Shire, By Quarter, 2011-2016



Source: Noosa Shire Council 2016b (Data);

The median approval value of dwellings between 1 July 2011 and 30 June 2016 was \$269,140 in Noosa Shire, and the median floor area of approved dwellings was 250m².

Of the 1,343 new dwellings approved where value data was available, 417 dwellings were valued at between \$250,000 and \$350,000 (31%), and 372 dwellings were valued at between \$150,000 and \$250,000 (28%) (**Table 41**). Of the 56 attached dwellings (including flats, units and



apartments but excluding secondary dwellings) approved during the period, 36 dwellings were priced at more than \$750,000 per dwelling.²²

Table 41. Approved Value per Dwelling by Locality, Noosa Shire, 1 July 2011 to 30 June 2016

Dwelling Type	Approval Value Per Dwelling ('000)									Total
	\$0-50	\$50-150	\$150-250	\$250-350	\$350-450	\$450-550	\$550-650	\$650-750	\$750+	
Separate House	29	62	363	409	143	58	33	25	105	1,227
Separate House and Secondary Dwelling		4	4	2						10
Flat, Unit or Apartment (a)	14						6		36	56
Secondary Dwelling	12	18	4		1					35
Semi-Detached		2	1	6				2		11
Caravan, Cabin, Houseboat	1	3								4
Total	56	89	372	417	144	58	39	27	141	1,343

Note: Excludes approvals with \$0 approval value as it was assumed that this data was not available. Flat, unit or apartment impacted by \$36m development featuring 36 units.

Source: Noosa Shire Council 2016b (Data);

Of the 1,278 new dwellings approved where floor area data was available from Council, 566 dwellings had floor areas of 100-250m² (44%), and 409 dwellings had floor areas of 250-350m² (32%) (**Table 42**). Overall, over a half (55%) were over 250m². Only 5.2% of dwellings were less than 100m².

²² These were all part of the one development at Serenity Close, Noosa Heads where all 36 dwellings were valued at \$1 million each.



Table 42. Approved Floor Area per Dwelling by Locality, Noosa Shire, 1 July 2011 to 30 June 2016

Dwelling Type	Approved Floor Area Per Dwelling (m ²)							Total
	20-100	100-250	250-350	350-450	450-550	550-650	650+	
Separate House	28	497	409	143	51	17	24	1,169
Separate House and Secondary Dwelling		8						8
Flat, Unit or Apartment	14	42						56
Secondary Dwelling	22	10		1				33
Semi-Detached	0	9						9
Caravan, Cabin, Houseboat	3	0						3
Total	67 (5%)	566 (44%)	409 (32%)	144 (11%)	51 (4%)	17 (1%)	24 (2%)	1,278 (100%)

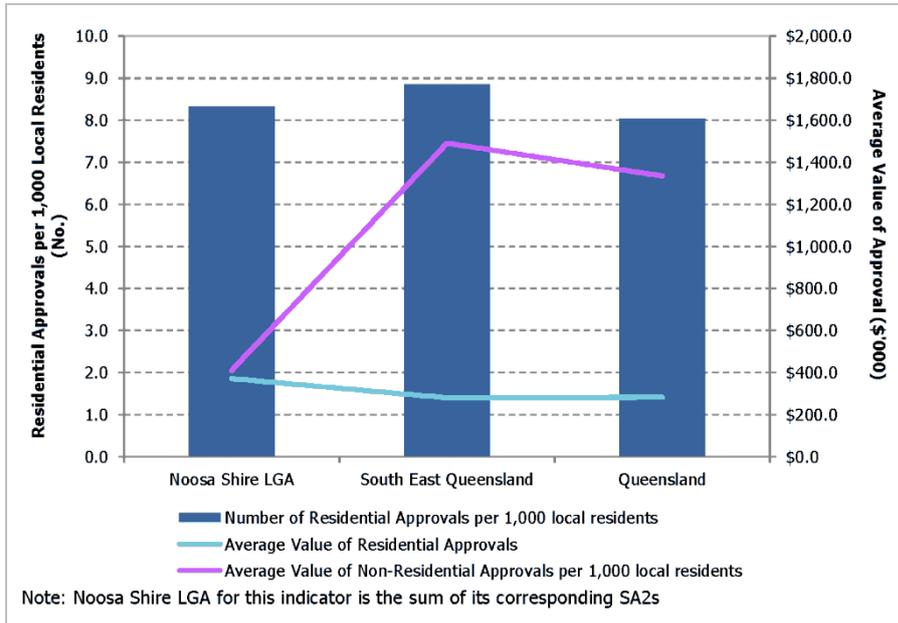
Note: Excludes approvals with a floor area of less than 20m² as it was assumed that this data was incorrect.

Source: Noosa Shire Council 2016b (Data);

Comparatively, Noosa Shire Council's Community Profile (AEC Group 2015) noted that in 2013-14, the average value of resident building approvals in the Shire was 30% higher than SEQ and Queensland. Noosa Shire's average value per residential approval in 2013-2014 was \$371,518 compared to \$280,458 in SEQ and \$283,065 in Queensland. The number of approvals per 1,000 residents is above the Queensland average but below the SEQ average, with 8.3 approvals per 1,000 local residents in Noosa Shire, 8.9 approvals per 1,000 local residents in SEQ and 8.0 approvals per 1,000 local residents for Queensland (**Figure 47**).



Figure 47. Building Approvals, Value and Number, Noosa Shire, SEQ and Queensland, 2013-14



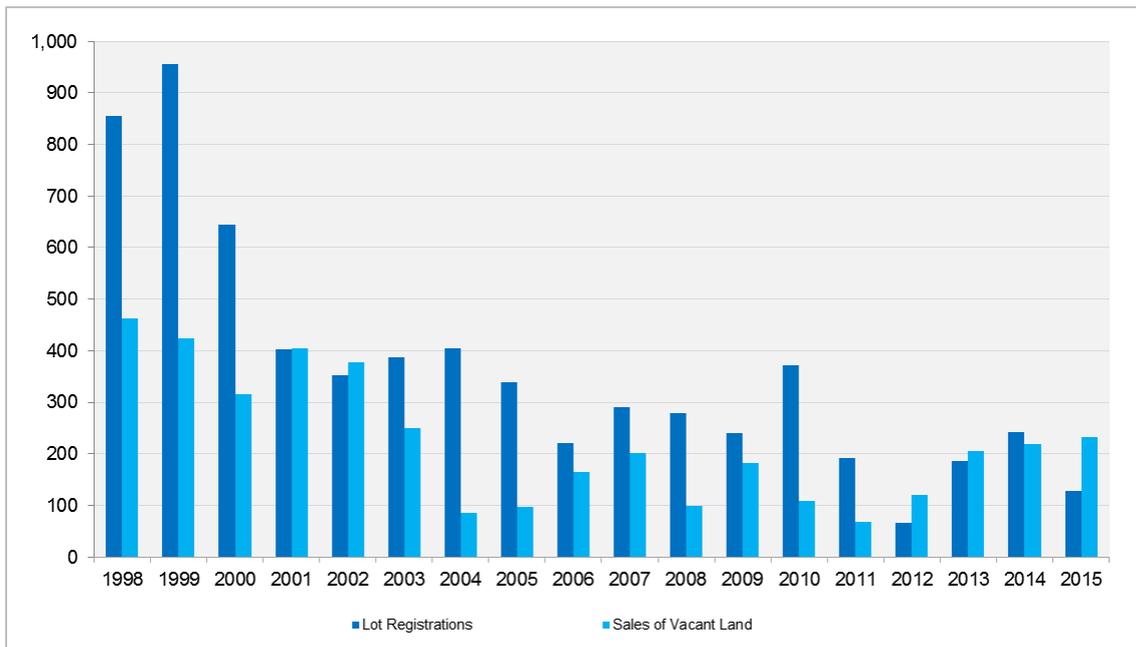
Source: AEC Group 2015;

6.1.2 Development Activity – Lots

Development activity in terms of both new lot registration (which includes attached lots) and sales of vacant land have shown a marked decline over the last 20 years (**Figure 48**). The stock of urban residential lot approvals has likewise undergone a long term decline, from nearly 2,000 lots in 1998, to around 330 lots on average during 2015. There was some temporary resurgence between 2006 and 2009 (**Figure 49**).



Figure 48. Number of Lot Registrations and Sales of Vacant Land, Noosa Shire, 1998-2015

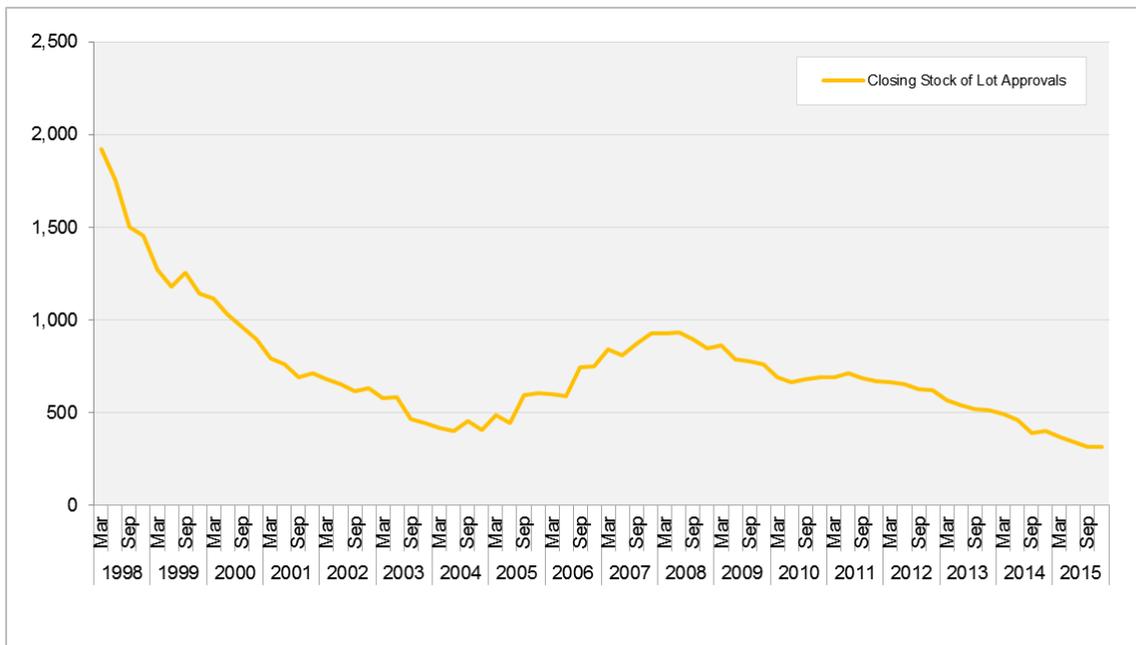


Notes: Lot registrations: Total number of residential lots registered. Includes standard lots (60m² to 5ha), and attached lots (unit and townhouse lots) that have had their titles registered by the Department of Natural Resources and Mines.

Sales of vacant land: Number of vacant urban residential lots, sized 140m² to 2,500m², that were sold in the reporting period based on date of contract.

Source: Queensland Government 2016e;

Figure 49. Stock of Urban Residential Lot Approvals, Noosa Shire, 1998-2015



Notes: Total stock of uncompleted residential lots within active approvals. It is expected that some developments will not proceed and a number of these approvals will subsequently lapse or be amended.

Source: Queensland Government 2016e;



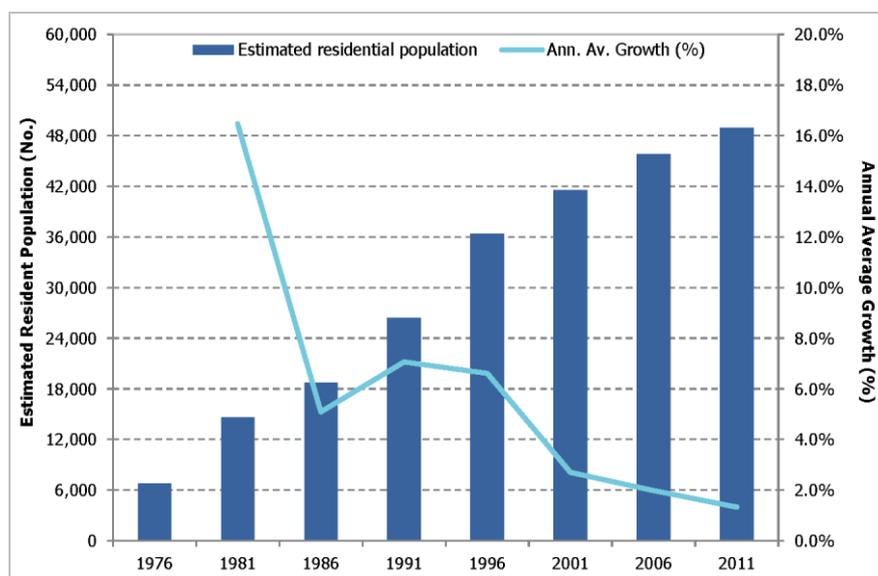
6.2 Analysis of Trends in Community Profile

Review of Noosa Shire Council's Community Profile (AEC Group 2015) and census data over time (2001 to 2011) suggest several demographic trends which may affect future housing demand:

- **Slowing population growth:** Population growth has been slowing in Noosa Shire (Figure 50). Projections suggest that population growth will continue to slow to a growth rate of under approximately 1% per year after 2016 (Queensland Treasury, 2015 Edition, Medium Series).

The implication for housing will be that pressure on existing stock will be less strong than in the past, where growth rates between 16.5% and 5.1% were experienced in the period between 1981 and 1996 (see Figure 50). More recently this growth rate had slowed considerably to 1.3% between 2006 and 2011.

Figure 50. Estimated resident population, Noosa Shire, 1976-2011



Source: AEC Group 2015;

In terms of population, this effectively means that the so called 'population cap'²³ or capacity of 56,500 people identified by the Mayor in 1995 for Noosa Shire would not be reached until 2026 under the Low series projection, approximately 2022-2023 under the Medium series projection, and 2021 under the High series projection. This is up to 20 years later than was envisaged at the time of the 1997 Strategic Plan, which projected a resident population of around 56,500 persons by 2007.

In terms of dwellings, this means that the number of new dwellings required to reach capacity will also be needed less rapidly than may have been anticipated when the concept of the population cap was mooted. Hence under existing projections (see Section 6.3),

²³ i.e. the maximum potential for development intended by the planning scheme for the Shire as a whole at that time (Noosa Council, 1999)

between an additional 3,900 dwellings (under the Low series projection) and 6,440 dwellings (under the High series projection) would be required to reach that capacity.

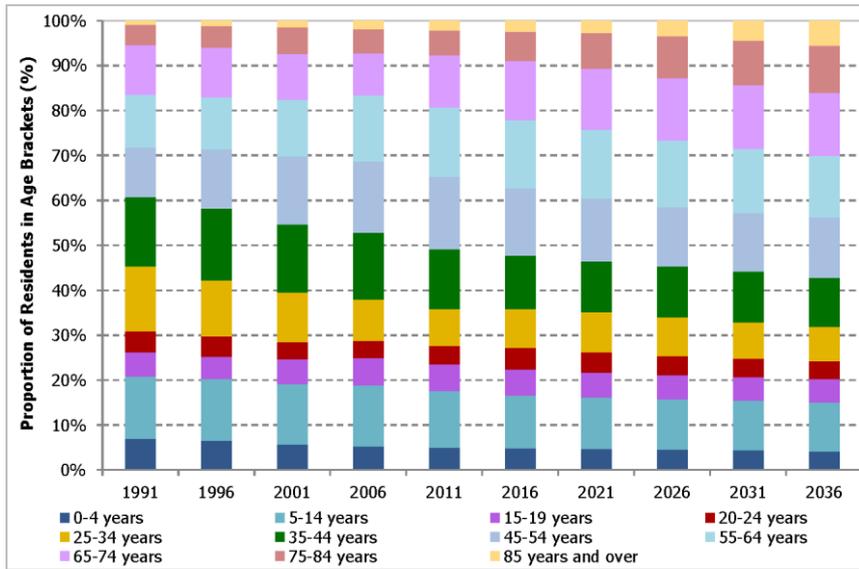
The Noosa Plan 2006 re-estimated a population capacity for Noosa Shire of 61,350 people partly due to South Peregian being added to Noosa Shire: 40,150 people on the coast and 20,200 people in the hinterland and rural areas. That population capacity was expected to be reached by now, however population increase slowed and if current levels remain, would not be reached until 2036 under the Medium series projection, some twenty years away.

The Noosa Plan 2006 had already anticipated and planned for this approximate population to be in place by 2016, so theoretically there is capacity to support the same predicted 2036 population under the current Plan. However, many remaining sites are perhaps those that are more complex to develop; town and village boundaries will continue to define the extent of land for development in Noosa Shire; and land for new 'greenfield' development remains limited, so in order to reach that capacity, other approaches such as infill development will need to be considered, and underutilised land more efficiently used. It is also noted that there is considerable turnover in population – with people leaving (anecdotally for a range of reasons) and arriving. These people may have different characteristics and different housing needs which may need to be accommodated.

- **Ageing population profile:** There will be significant changes in the population age profile of Noosa Shire between 2011 and 2036. These are shown in **Table 43** and on **Figure 51**.
 - An ongoing decline in the proportion of children and young people of all ages:
 - 0 to 4 years (from 4.9% to 4.1%);
 - 5 to 9 years (from 6.1% to 5.5%);
 - 10 to 14 years (from 6.4% to 5.8%);
 - 15 to 19 years (from 6.0% to 5.3%);
 - An increase in the proportion of young people 20 to 24 from 4.1% in 2011 to a peak of 4.7% in 2016, after which this proportion will slowly decline to 4.0% at 2036;
 - A similar pattern for 25 to 29 year olds, although the peak in these will occur a little later, in 2026, after which they will decline to 2036;
 - A decline in all age groups from 30 to 64 years between 2011 and 2036;
 - A steady increase in all age groups over 65 years from 2011 to 2036, resulting in an overall increase of those over 65 from 19.4% in 2011 to 30.5% in 2036.



Figure 51. Residents by Age Bracket, Noosa Shire, 1991-2036



Source: AEC Group 2015;



Table 43. Age group projections (medium series) (2015 edition), Noosa Shire, 2011-2036

Age Group	2011		2016		2021		2026		2031		2036	
	Total	%										
0-4	2,490	4.9%	2,466	4.6%	2,470	4.4%	2,554	4.4%	2,566	4.3%	2,568	4.1%
5-9	3,118	6.1%	3,228	6.0%	3,194	5.7%	3,274	5.6%	3,357	5.6%	3,402	5.5%
10-14	3,267	6.4%	3,327	6.2%	3,395	6.1%	3,454	5.9%	3,516	5.8%	3,602	5.8%
15-19	3,049	6.0%	3,144	5.9%	3,147	5.7%	3,238	5.6%	3,261	5.4%	3,306	5.3%
20-24	2,084	4.1%	2,502	4.7%	2,516	4.5%	2,531	4.4%	2,544	4.2%	2,504	4.0%
25-29	1,990	3.9%	2,151	4.0%	2,367	4.3%	2,407	4.1%	2,369	3.9%	2,348	3.8%
30-34	2,276	4.5%	2,290	4.3%	2,387	4.3%	2,520	4.3%	2,509	4.2%	2,467	4.0%
35-39	3,132	6.1%	2,688	5.0%	2,794	5.0%	2,919	5.0%	2,949	4.9%	2,934	4.7%
40-44	3,532	6.9%	3,458	6.4%	3,121	5.6%	3,368	5.8%	3,466	5.8%	3,475	5.6%
45-49	4,128	8.1%	3,873	7.2%	3,747	6.7%	3,549	6.1%	3,811	6.3%	3,911	6.3%
50-54	4,075	8.0%	4,161	7.8%	3,966	7.1%	3,921	6.7%	3,770	6.3%	4,064	6.6%
55-59	3,936	7.7%	4,190	7.8%	4,236	7.6%	4,170	7.2%	4,148	6.9%	4,041	6.5%
60-64	4,068	8.0%	4,013	7.5%	4,303	7.7%	4,416	7.6%	4,391	7.3%	4,398	7.1%
65-69	3,389	6.6%	4,038	7.5%	4,007	7.2%	4,355	7.5%	4,462	7.4%	4,490	7.2%
70-74	2,494	4.9%	3,163	5.9%	3,713	6.7%	3,770	6.5%	4,103	6.8%	4,234	6.8%
75-79	1,686	3.3%	2,199	4.1%	2,789	5.0%	3,331	5.7%	3,411	5.7%	3,754	6.1%
80-84	1,190	2.3%	1,389	2.6%	1,799	3.2%	2,325	4.0%	2,805	4.7%	2,940	4.7%
85+	1,134	2.2%	1,351	2.5%	1,606	2.9%	2,052	3.5%	2,708	4.5%	3,502	5.7%
Total	51,038	100.0%	53,630	100.0%	55,558	100.0%	58,154	100.0%	60,147	100.0%	61,940	100.0%

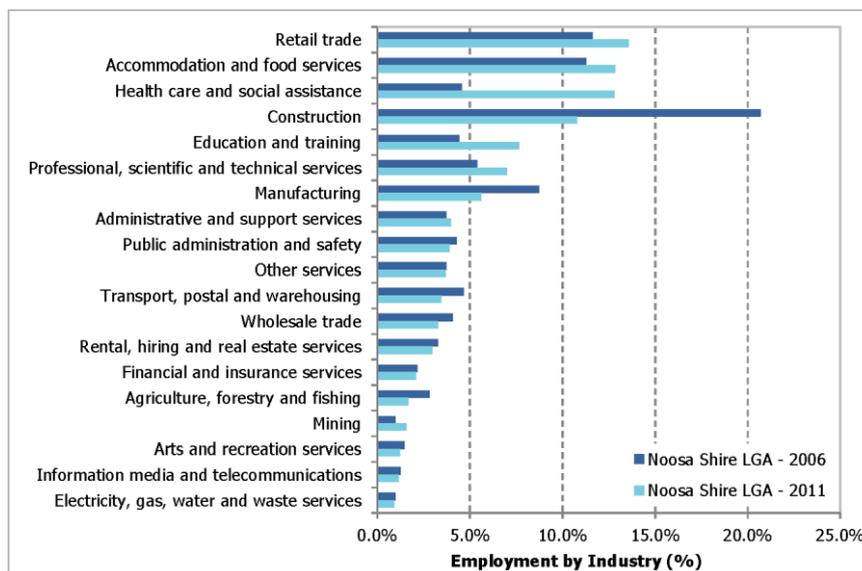
Source: Queensland Government 2016g;



Noosa Shire's population will continue to age, as shown by the above data. This demographic shift has numerous implications for housing including possible additional demand for:

- Smaller dwellings suitable for smaller households and affordable for people on low incomes;
 - Dwellings that are generally easier to maintain and live in, and more secure, including attached or semi-detached dwellings, either single storey villas, two storey duplexes or townhouses with a bedroom and bathroom downstairs; or multiple storey units with a lift;
 - Well located higher density housing, close to services and transport;
 - Dwellings with appropriate universal housing features such as level thresholds, wider door/hallway widths, flexible fittings and fixtures, bathroom design features to accommodate a wide range of users, etc;
 - Alternative forms of housing, including secondary dwellings, and dwellings suitable for group households;
 - Specific retirement living options, but not limited to independent living in duplex style dwellings in retirement villages;
 - Residential care facilities;
 - Retention of the family home, supported by in-home care.
- **New trends in employment:** Various trends in employment structure are likely to continue. Growth in retail trade and accommodation and food services is indicative of the strong local tourism industry and the job losses in other areas such as construction and manufacturing. Growth in healthcare is likely a function of the aging population as well as further advances in health related areas (which continues to generate new jobs). The significant growth in healthcare is a national trend and is likely to continue. The growth in professional, technical services as well as administrative services may signal early growth of new industries that can make a relatively high value-added contribution to the economy.

Figure 52. Employment by Industry, Noosa Shire, 2006 and 2011



Source: AEC Group 2015;

These employment trends could result in:

- An inflow of younger, most likely professional or white collar people, who may demand new and different types of housing, including smaller and possibly higher density dwellings;
 - Some possible increase in family formation among younger workers. This may result in a demand for traditional separate dwelling house stock which will be released by older residents. Anecdotally, there are indications of some younger families purchasing housing on Noosa Waters, for instance. This is confirmed by migration data. This may result in increased utilisation and demand for existing larger housing types, subject to affordability. It may also result in a decreased proportion of dwellings owned outright, and a higher proportion of dwellings with a mortgage. Affordability may therefore be important, and it is likely to be housing stock which is older and/or requires renovation which will be sought. Smaller lot dwellings may also be sought.
 - Demand continuing for well located, affordable key worker housing, particularly among younger people employed in the hospitality and retail industries;
 - A need to retain more affordable housing across the LGA for those who are employed in lower paid industries such as health and ageing. While in terms of socio-economic advantage, Noosa Shire is overall average, it is clear that there is great variation in income levels in Noosa Shire, with some pockets of disadvantage. Some of the lower cost housing areas are upgrading through renovations and new builds. Retention of more affordable housing for lower income households will remain important, although it appears likely there will be a continuing demand at the top end of the market. Trends toward increasingly high average values of residential approvals will have implications for the affordability of future housing stock. The types of stock being delivered may also suit the current rather than the future market.
- **Growth in smaller household types:** Between 2001 and 2011, the proportion of couples with no children increased slightly from around 33.2% to 34%, the proportion of couples with children decreased slightly from 26.8% to 25.4%, and the proportion of lone person households increased slightly from 23.5% to 24.4%. The proportions of other household types have remained quite similar during this 10 year period, although the numbers of each household type have continued to grow.

Table 44. Household type, Noosa Shire, 2001, 2006, 2011

Household Type	2001	2006	2011
Couple with no children	5,287 (33.2%)	5,937 (34.0%)	6,492 (34.0%)
Couple with children	4,267 (26.8%)	4,538 (26.0%)	4,847 (25.4%)
One parent family	1,862 (11.7%)	2,032 (11.7%)	2,192 (11.5%)
Other family	88 (0.6%)	119 (0.7%)	120 (0.6%)
Total Families	11,504 (72.1%)	12,626 (72.4%)	13,651 (71.4%)
Lone person household	3,748 (23.5%)	4,113 (23.6%)	4,665 (24.4%)
Group household	697 (4.4%)	699 (4.0%)	793 (4.1%)



Total Households	15,949 (100%)	17,438 (100%)	19,109 (100%)
-------------------------	--------------------------	--------------------------	--------------------------

Source: ABS 2016;

These trends will continue into the future. Projections for future household type are discussed in detail in Section 6.4. The implication for housing will be an increased need for smaller dwellings, and unless changes in dwelling stock occur, a greater mismatch of dwelling type with household type than currently exists. This is not to say that there will not always be small households that will prefer (and be able to afford) large dwellings e.g. many households in Noosa Shire may have more friends and relatives visiting than may be the case in a non-coastal locality. However there will be an increased number of households demanding smaller dwellings than currently.

- **Decreasing household size:** Average household size in the Noosa Shire decreased from 2.42 people per household in 2001, to 2.40 in 2006, to 2.37 in 2011. Noosa Shire reported a lower average number of persons per household (2.4) compared to the SEQ Region (2.6) and the State (2.6) in 2011. Average occupancy also decreased slightly from around 2.0 people per dwelling in 2001, to 1.8 in 2006 and 1.9 in 2011. This is a trend that is projected to increase over time, with Queensland Treasury predicting that average occupancy will fall from 2.1 in 2011 to approximately 1.97 in 2036 (medium series projection).

The implication for housing will be the increased need for smaller dwellings, and unless changes in dwelling stock occur, potentially a greater mismatch of dwelling size and household size than currently exists. As above, this does not mean, however, that all smaller households will choose small dwellings, and there will still be a need for new larger as well as smaller dwellings.

- **Growth in people needing assistance:** Data on a person's need for assistance has only been collected since 2006, however, the number of people in the Noosa Shire requiring assistance has increased by around 480 people between 2006 and 2011, and the proportion has increased from 4.4% to 5.1% of the population.

The implication for housing will be an increased need for housing which is suitable for people with disabilities, or able to be readily modified.

6.3 Population, Household and Dwelling Projections

6.3.1 Population Projections

Population, household and dwelling projections are provided by the Queensland Government (Queensland Treasury (QT)) at a variety of geographic scales.

Population projections are developed according to a multi-regional cohort component model which means that for Queensland and SA4s each population cohort is aged over time to the next age group, while taking into account assumptions on birth and death rates, and inward and outward migration. Low, medium and high population growth assumptions are developed based on different assumptions around fertility, mortality and migration. These projections at the Queensland and SA4 levels are then apportioned to SA2s based on land supply capacity assumptions for urban areas and a constant share of population for rural areas. Projections for Local Government Areas are then aggregated based on the SA2 projections.

Population projections from the State Government are based on Estimated Resident Population (ERP) so they include people who were away on census night but who are normally residents of



the Shire, and exclude visitors. They also include people living in non-private dwellings such as residential aged care facilities and tourist accommodation facilities.

Population projections for Noosa Shire are summarised in **Table 45**. According to the Medium series scenario, the population growth forecast between 2016 and 2036 is around 8,310 people.

Table 45. Population Projections, Noosa Shire, 2011-2036

Dwelling	As at 30 June					
	2011	2016	2021	2026	2031	2036
Low Series	51,038	53,470	54,975	56,970	58,481	59,814
Medium Series	51,038	53,630	55,558	58,154	60,147	61,940
High Series	51,038	53,790	56,151	59,373	61,875	64,158

Source: Queensland Government household and dwelling projections, 2015 edition (Queensland Government 2016g);

6.3.2 Household Projections

Household projections by type for Noosa Shire are summarised in **Table 46**. According to these projections, the number of households in the Shire will increase between 2016 and 2036 by around 2,441 households. Household projections exclude people living in non-private dwellings.

Table 46. Household Type Projections, Medium Series, Noosa Shire, 2011-2036

Household Type	As at 30 June					
	2011	2016	2021	2026	2031	2036
Couple with children	5,276	5,374	5,406	5,518	5,603	5,707
Couple without children	7,050	7,608	7,878	8,170	8,352	8,489
One parent family	2,234	2,375	2,424	2,499	2,570	2,637
Other family	136	146	147	149	149	151
Other household	510	547	565	587	605	613
Lone person household	5,057	5,490	5,686	5,947	6,169	6,319
Group household	889	949	970	992	1,006	1,012
Total Households	21,152	22,487	23,075	23,862	24,455	24,928

Source: Queensland Government household and dwelling projections, 2015 edition (Queensland Government 2016h);

6.3.3 Dwelling Projections

Dwelling projections are developed by making assumptions about the future dwelling needs of projected households, and then distributing these dwellings to areas in Queensland based on the same breakdown as the population projections. Dwelling projections include both occupied and unoccupied dwellings.

Dwelling projections for Noosa Shire are provided in **Table 47**. According to the Medium series projection, the number of dwellings in the Shire will increase by 5,172 dwellings between 2016 and 2036. Some of these dwellings are vacant dwellings which are used by visitors when



occupied. In this report, 'visitor dwellings' and the projection of 'visitor dwellings' include unoccupied dwellings which have been assumed to be used when occupied by visitors, and therefore this should be considered when making comparisons with the dwelling projections outlined here.

Table 47. Dwelling Projections, Noosa Shire, 2011-2036

Dwelling	As at 30 June					
	2011	2016	2021	2026	2031	2036
Low Series	24,250	26,094	26,994	28,127	29,095	30,002
Medium Series	24,250	26,233	27,416	28,907	30,191	31,405
High Series	24,250	26,373	27,839	29,692	31,293	32,814

Source: Queensland Government household and dwelling projections, 2015 edition (Queensland Government 2016h);

To summarise, the State Government projections suggest growth from 2016 to 2036 of around 8,310 people, 2,441 households and 5,172 dwellings. It should be noted that these figures are not directly comparable. As noted above, residents may live in non-private dwellings but these are excluded from household and dwelling projections, and dwelling projections include unoccupied dwellings.

6.3.4 Unitywater Demand Modeller and Tracking Tool (DMaTT) Dwelling Projections

Modelling undertaken by Unitywater using their Demand Modeller and Tracking Tool (DMaTT) (2016) for Noosa Shire was utilised to supplement the projections of QT by providing more information on resident vis-a-vis visitor dwellings.

The DMaTT dwelling count is based on the number of observed dwellings on each property categorised by QPP land use (i.e. dwelling house, dual occupancy, multiple dwelling, short-term accommodation). To determine which dwellings were short term visitor accommodation, the property name for each property which was group-titled in the cadastre that had multiple dwellings was 'Google' searched for providing accommodation and classified as short term accommodation. Where the online search found that the property provided short term accommodation, all dwellings were marked as providing short term accommodation. One dwelling was allocated to each group titled lot that contained a dwelling/apartment. Duplicate lots and common property were not allocated dwellings. The number of dwellings on each property was checked in GIS to ensure duplicates were removed and the ownership of each unit was unique and not body corporate etc.

Only a small number of detached dwellings were identified as being visitor dwellings due to this methodology. The methodology is likely to overstate attached visitor dwellings and detached resident dwellings, and understate detached visitor dwellings and attached resident dwellings.

This modelling suggested that there were some 23,637 dwellings occupied by residents in 2014 (**Table 48**). Around 80% of these dwellings were estimated to be detached dwellings, and 20% were attached dwellings. The model also estimates that the Noosa Plan ultimately could support 29,370 resident dwellings in the Shire, with 72% of these being detached dwellings, and 26% being attached dwellings.

In addition to resident dwellings, it was estimated that there were 4,781 visitor dwellings in residential zones in the Noosa Shire in 2014 (**Table 49**). The model estimates that the Noosa



Plan ultimately could support an estimated 5,666 visitor dwellings in the Shire based on a range of assumptions including that, where other information is not available, 10% of the dwellings created in new apartment developments would be used by visitors.

Their projections by statistical areas are contained in **Figure 53** to **Figure 56**, and show the distribution of visitor dwellings compared with resident dwellings across the Shire. This demonstrates the heavy concentration of visitor accommodation in Noosa Heads, Noosaville, and to a lesser extent, the Eastern Beaches.



Table 48. Existing and Projected Resident Dwellings, DMaTT Model, Projection Areas and Noosa Shire, 2014-2036

Projection Area (SA2)	Dwelling Type	Existing and Projected Resident Dwellings							Potential Increase in Dwellings			
		2014	2016	2021	2026	2031	2036	Ultimate Development	2014-2036	2016-2036	2014-Ultimate	2016-Ultimate
Noosa Heads	Detached	1,648	1,718	1,799	1,798	1,798	1,796	1,856	148	78	208	138
	Attached	634	696	873	966	968	991	1,040	357	295	406	344
Noosa Hinterland (Noosa part)	Detached	7,240	7,453	7,993	8,019	8,117	8,146	8,277	906	693	1,037	824
	Attached	218	328	607	681	948	1,035	1,039	817	707	821	711
Noosaville	Detached	2,654	2,769	2,945	2,950	2,950	2,950	2,972	296	181	318	203
	Attached	1,349	1,442	1,503	1,576	1,577	1,577	2,242	228	135	893	800
Peregian (Noosa part)	Detached	1,549	1,589	1,610	1,586	1,569	1,569	1,584	20	-20	35	-5
	Attached	529	539	539	657	762	762	768	233	223	239	229
Sunshine Beach	Detached	2,350	2,348	2,400	2,423	2,329	2,343	2,343	-7	-5	-7	-5
	Attached	1,080	1,242	1,323	1,431	1,744	1,846	1,846	766	604	766	604
Tewantin	Detached	3,706	3,791	3,837	3,837	3,837	3,851	4,040	145	60	334	249
	Attached	680	788	934	1,012	1,042	1,072	1,363	392	284	683	575
Total	Detached	19,147	19,668	20,584	20,613	20,600	20,655	21,072	1,508	987	1,925	1,404
	Attached	4,490	5,035	5,779	6,323	7,041	7,283	8,298	2,793	2,248	3,808	3,263
	TOTAL	23,637	24,703	26,363	26,936	27,641	27,938	29,370	4,301	3,235	5,733	4,667

Source: Unitywater 2016;



Table 49. Existing and Projected Non-Resident/Visitor Dwellings, DMaTT Model, Projection Areas and Noosa Shire, 2014-2036

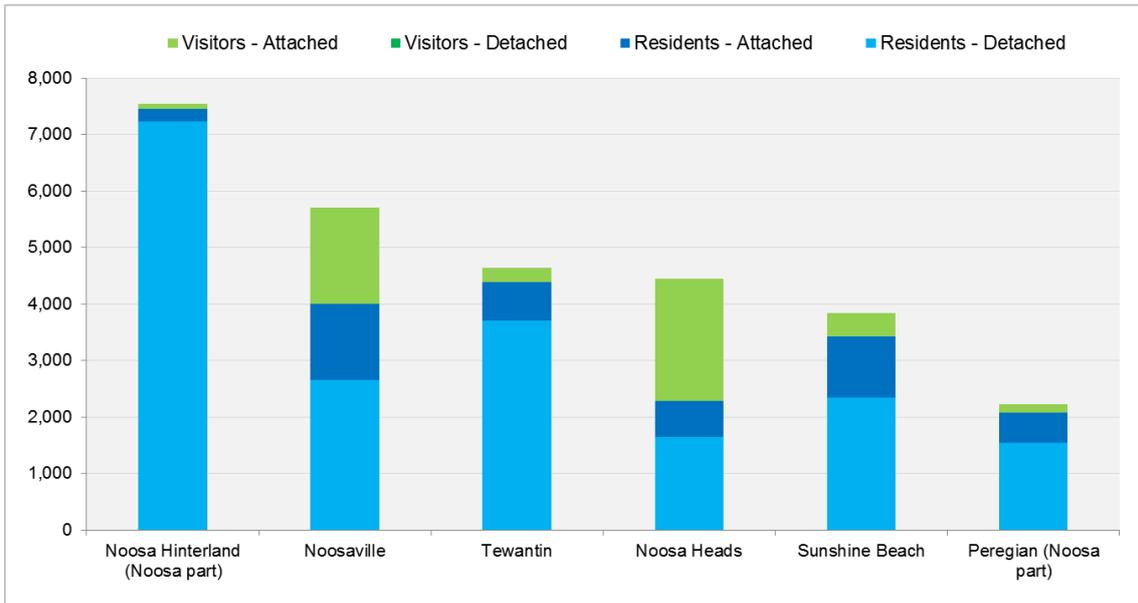
Projection Area (SA2)	Dwelling Type	Existing and Projected Resident Dwellings							Potential Increase in Dwellings			
		2014	2016	2021	2026	2031	2036	Ultimate Development	2014-2036	2016-2036	2014-Ultimate	2016-Ultimate
Noosa Heads	Detached	1	1	1	1	1	1	14	0	0	13	13
	Attached	2,169	2,249	2,332	2,382	2,397	2,406	2,587	237	157	418	338
Noosa Hinterland (Noosa part)	Detached	2	3	3	3	3	3	3	1	0	1	0
	Attached	90	134	134	134	134	134	134	44	0	44	0
Noosaville	Detached	1	1	1	1	1	1	1	0	0	0	0
	Attached	1,702	1,717	1,717	1,732	1,732	1,732	1,990	30	15	288	273
Peregian (Noosa part)	Detached	0	0	0	0	0	0	0	0	0	0	0
	Attached	145	155	205	205	207	207	223	62	52	78	68
Sunshine Beach	Detached	0	0	0	0	0	0	0	0	0	0	0
	Attached	414	414	414	435	443	457	457	43	43	43	43
Tewantin	Detached	0	0	0	0	0	0	0	0	0	0	0
	Attached	257	257	257	257	257	257	257	0	0	0	0
Total	Detached	4	5	5	5	5	5	18	1	0	14	13
	Attached	4,777	4,926	5,059	5,145	5,170	5,193	5,648	416	267	871	722
	TOTAL	4,781	4,931	5,064	5,150	5,175	5,198	5,666	417	267	885	735

Note: Blue shading refers to dwellings outside the priority infrastructure area.

Source: Unitywater 2016;

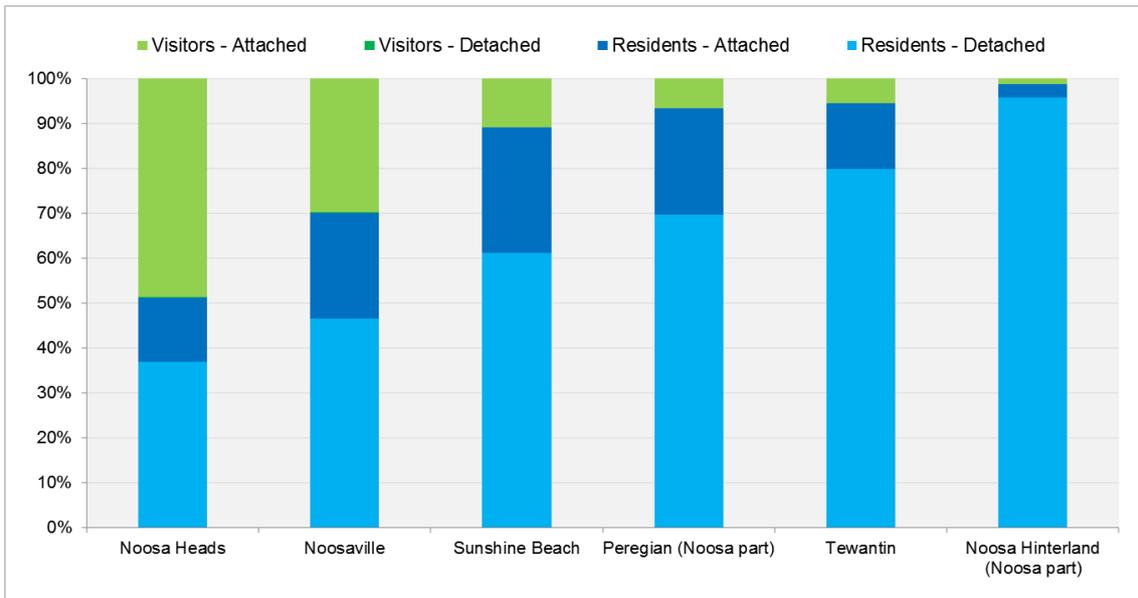


Figure 53. Existing Dwellings, DMaTT Model, Projection Areas, 2014



Source: Unitywater 2016;

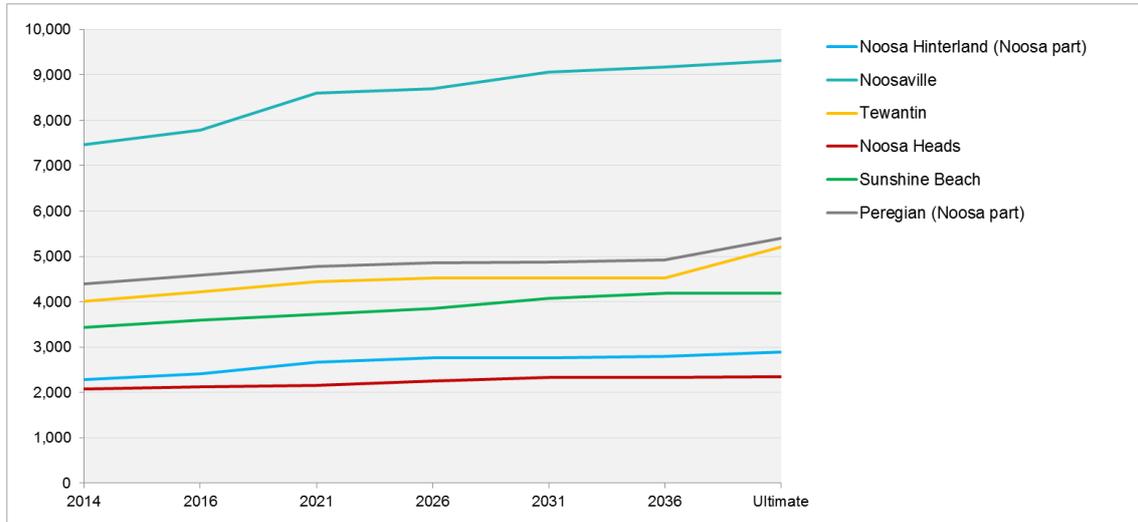
Figure 54. Existing Dwellings (Proportions), DMaTT Model, Projection Areas and Noosa Shire, 2014



Source: Unitywater 2016;

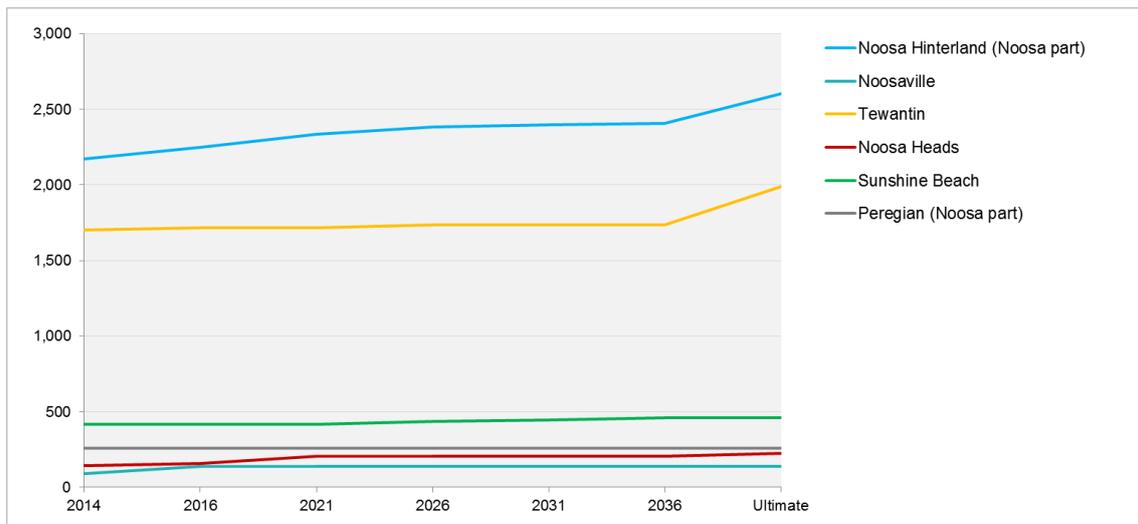


Figure 55. Existing and Projected Resident Dwellings, DMA TT Model, Projection Areas, 2014-2036/Ultimate



Source: Unitywater 2016;

Figure 56. Existing and Projected Non-Resident/Visitor Dwellings, DMA TT Model, Projection Areas and Noosa Shire, 2014-2036/Ultimate



Source: Unitywater 2016;

6.3.5 Tourism Trends and Visitor Projections

Tourism Research Australia (2016) publishes tourism data and projections for Brisbane and Gold Coast (combined) and the rest of Queensland from 2005/06 to 2024/25 (**Table 50**). Recent growth has been strong, however growth in total visitor nights in the past ten years has been variable, with declines of around 8% in some years (**Figure 57**).



Table 50. Estimated and forecast total visitor nights, Brisbane and Gold Coast, and Rest of State, 2005-06 to 2024-25

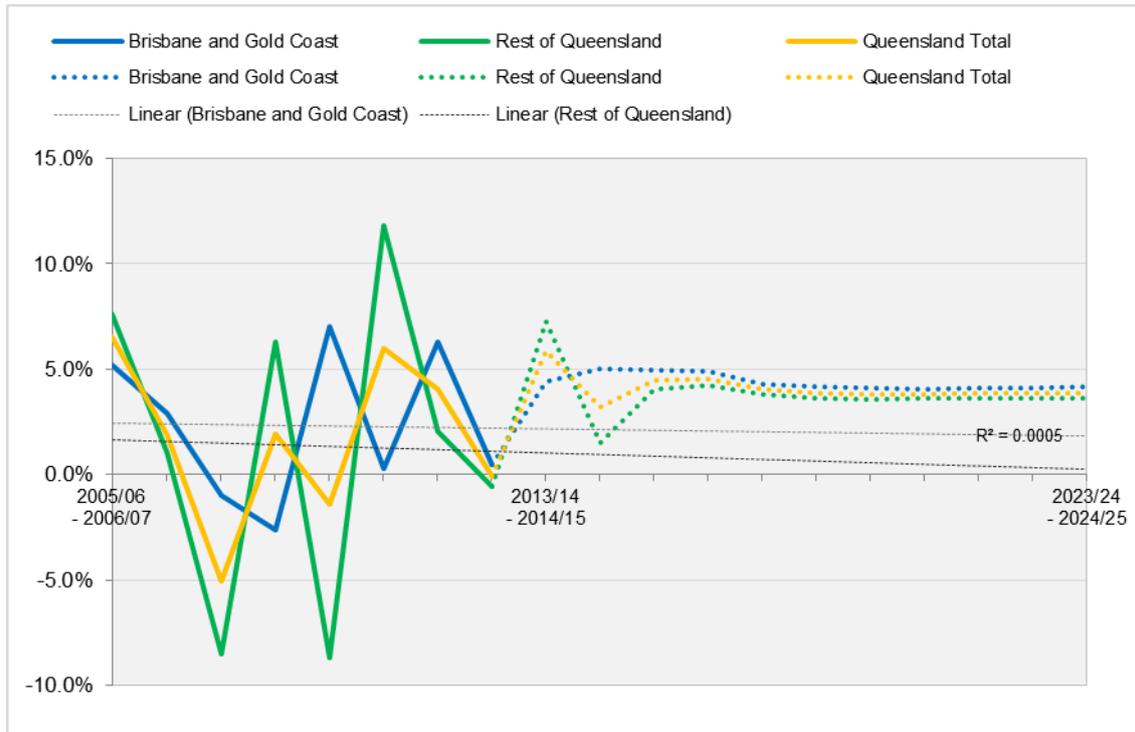
Year	Brisbane and Gold Coast	Rest of State	Queensland
2005-06	49,825,000	56,983,000	106,810,000
2006-07	52,427,000	61,339,000	113,767,000
2007-08	53,931,000	61,953,000	115,884,000
2008-09	53,397,000	56,670,000	110,067,000
2009-10	51,997,000	60,222,000	112,219,000
2010-11	55,655,000	54,996,000	110,649,000
2011-12	55,799,000	61,492,000	117,291,000
2012-13	59,303,000	62,734,000	122,036,000
2013-14	59,596,000	62,370,000	121,965,000
2014-15	62,238,000	66,919,000	129,157,000
2015-16	65,351,000	67,913,000	133,264,000
2016-17	68,591,000	70,665,000	139,256,000
2017-18	71,935,000	73,677,000	145,612,000
2018-19	75,035,000	76,505,000	151,540,000
2019-20	78,152,000	79,273,000	157,425,000
2020-21	81,355,000	82,109,000	163,464,000
2021-22	84,670,000	85,063,000	169,734,000
2022-23	88,134,000	88,132,000	176,265,000
2023-24	91,760,000	91,319,000	183,079,000
2024-25	95,567,000	94,633,000	190,199,000

Notes: Grey highlighted cells are forecasts.

Source: Tourism Research Australia 2016;



Figure 57. Yearly change in total visitor nights, Queensland, 2005/06 to 2024/25



Total visitor nights in Queensland are projected by Tourism Research Australia to increase at a rate of around 4.2% per year during 2016-2021 and by 3.9% per year in 2021-2025 (the projections end at the year to 30 June 2025). The projections for Brisbane and Gold Coast are for growth of around 4.5% per year in 2016-2021 and by 4.1% per year in 2021-2025 (**Table 51**).

Table 51. Forecast annual growth rates for total visitor nights, Brisbane and Gold Coast, and Rest of State, 2016-2025

Period	Brisbane and Gold Coast	Rest of State	Queensland
2016-2021	4.5%	3.9%	4.2%
2021-2025	4.1%	3.6%	3.9%

Source: Tourism Research Australia 2016;

However, when a trend line is added to the yearly change in total visitor nights for Brisbane and Gold Coast (combined) for the period between 2005/06 and 2014/15, the trend is closer to 2.5% per year; and for the rest of Queensland, the trend is lower at around 2.0% (these trend lines are also shown on **Figure 57**).

Rather than apply the forecast annual growth rates developed by Tourism Research Australia, the average, or trend, rates of growth have been applied in Section 6.4.3 to assist in assessing possible future visitor accommodation requirements. The rate for Brisbane and Gold Coast was used as it was considered these may be more appropriate than using the figures for the rest of the State (that is, a flat 2.5% annual growth rate).



6.4 Estimating Future Housing Needs

Looking to the future, the growth in dwellings projected by the draft SEQ Region Plan offers an opportunity to address the many issues raised in this report about the mismatch of housing sizes, and the specific needs of many in our community or those who cannot afford to live comfortably in the mainly larger dwellings on offer. This section models those needs.

6.4.1 Methodology

The modelling of future housing need in the Noosa Shire has involved a number of components due to the significant number of dwellings in the Shire that are normally occupied by visitors and the influence that an increase in tourism numbers might have on the residential market for Noosa Shire residents. A separate 'projection strategy' was developed for each of these components of dwelling stock in the Noosa Shire. These projection strategies are outlined in the table below.

Table 52. Projection strategy for each component of dwelling stock

Component of dwelling stock	Projection strategy (strategy used to forecast/project future needs)
Dwellings normally occupied by residents	A propensity model is used to estimate future dwelling needs based on household type projections provided by the Queensland Government ²⁴ . Three scenarios are developed to consider future changes in propensities of households to live in certain dwelling types based on findings of earlier sections of the report (particularly housing choice and housing affordability). This process and the findings are outlined in Section 0 below.
Dwellings normally occupied by visitors and tourist accommodation	Two types of tourist accommodation are considered: tourist accommodation (holiday resorts, motels, hotels etc), and visitor dwellings (apartments, townhouses and holiday houses). These are separately considered, including assumptions about the growth in demand for tourist accommodation/visitor dwellings and new supply. If demand for tourist accommodation/visitor dwellings outstrips supply, resident dwellings may increasingly be used by tourists/visitors and make these dwellings less affordable. Therefore, forecasting future tourism demand is important for determining the availability of future resident housing. This process and the findings are outlined in Section 6.4.3 below.

²⁴ Queensland Government dwellings projections are not used as they include visitor dwellings. Household projections and household type projections sourced from the Queensland Government provide projections only for resident households, and therefore resident dwellings only. Visitor dwellings are separately analysed in this methodology.



Resident households living in resorts	On the other hand, if inadequate resident dwellings or types of dwellings (as currently occurs) are provided in Noosa Shire, an increasing number of permanent residents may seek accommodation in tourist resorts. At the present time it would appear that this balance is swinging toward these dwellings being used for tourist accommodation, and the modelling assumes that the Planning Scheme will be successful in at least partially addressing resident housing needs. Therefore three scenarios are developed to model the movement of permanent residents out of resort accommodation if it were to be used increasingly for tourist uses.
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6.4.2 Future Dwelling Diversity Needs for Residents

Future housing diversity to meet assumed resident household needs have been modelled using the household type projections undertaken by the Queensland Government (2016h) and discussed in Section 6.3.2. These household type projections are provided for the following household types:

- Couple family with children;
- Couple family without children;
- One parent family;
- Other family;
- Lone person households;
- Group households;
- Other households.

Household size is an important element determining dwelling preferences and therefore these household type projections have been disaggregated²⁵ to allow comparison of small households (households that could live in a 'small' or one to two bedroom dwelling) and large households (households that could live in a 'large' or three or more ('3+') bedroom dwelling) as below:

- Small Households
 - Couple family with child - three people usually resident
 - Couple family with no children
 - Single parent family - two people usually resident
 - Lone person household
 - Group household - two people usually resident
- Large Households
 - Couple family with children - 4+ people usually resident
 - Single parent family - 3+ people usually resident
 - All multi-family households

²⁵ As per the *State Interest Guideline - Housing supply and diversity*, April 2016.



- Group household - 3+ people usually resident
- All 'other' households.

It was assumed that the proportion of small to large households for each household type would remain the same. For example, although the number and proportion of couple families with children changes over time in line with the projections, it was assumed that the proportion of couple families with children and three people usually resident compared to the proportion of couple families with children and 4+ people usually resident would stay the same. This assumption is supported by information from the consultation that suggests that there is little overall change occurring in the demographic make-up of the population – and particularly that slightly younger empty nesters are arriving to take the place of older empty nesters who are now seeking retirement accommodation.

Given affordability issues in Noosa Shire and the lack of housing choice, it has been assumed that there are a proportion of households living in large 3+ bedroom houses that would prefer to live in other dwelling types and sizes if they were available. The changes in dwelling preferences for specific household types have been based on research presented in the previous sections of this housing needs assessment, including demographic analysis, housing market analysis and housing affordability, and housing choice comparisons with other similar Local Government Areas.

Three scenarios were developed with different assumptions about changes in dwelling preferences:

- No change scenario: current dwelling mix by household type will remain as it was in 2011 into the future to 2036.
- Low change scenario: current dwelling mix by household type will change slightly over time, with a shift in preference from large separate houses to other dwelling types.
- High change scenario: current dwelling mix by household type will change over time, with a larger shift in preference from large separate houses to other dwelling types.

This of course assumes the ability of the market to respond to the changes. The table below (**Table 53**) outlines the extent in shift in preferences away from large (3+ bedroom) separate houses for specific household types used in the scenarios. For some household types, it was assumed that current dwelling preferences would continue and therefore these are not shown in the table below. These were all large households – for example, couple families with at least two children, multi-family households, group households with at least three people usually resident, and all 'other' household types. A shift away from large separate houses for these household types was considered unlikely as well as inappropriate.



Table 53. Assumed percentage point change (a) in dwelling preference away from large separate houses, Noosa Shire, 2011-2036

Household Type	No Change	Low Change	High Change
Small Households			
Couple family with children with 3 people usually resident	No Change - 0%	-5%	-10%
Couple family with no children	No Change - 0%	-10%	-20%
Lone parent family with 2 people usually resident	No Change - 0%	-10%	-20%
Lone person households	No Change - 0%	-5%	-10%
Group household with 2 people usually resident	No Change - 0%	-7.5%	-15%
Large Households			
Lone parent family with 3+ people usually resident	No Change - 0%	-7.5%	-15%

Notes: (a) These are percentage point changes. As an example, if 75% of couples with no children were living in large houses, a 20% reduction would mean a fall to 55% of couples living in large houses.

The resulting proportions are shown below for each household type affected by the assumptions.

Table 54. Resulting proportion of households choosing large separate houses by household type, Noosa Shire, 2036

Household Type	No Change (Current Situation)	Low Change	High Change
Small Households			
Couple family with children with 3 people usually resident	84.1%	79.1%	74.1%
Couple family with no children	74.2%	64.2%	54.2%
Lone parent family with 2 people usually resident	62.8%	52.8%	42.8%
Lone person households	45.6%	40.6%	35.6%
Group household with 2 people usually resident	59.0%	51.5%	44.0%
Large Households			
Lone parent family with 3+ people usually resident	84.2%	76.7%	69.2%

The table below (**Table 55**) shows the mix of dwelling types that might be more suitable for those households moving away from large separate houses (if available).



Table 55. Assumed change in dwelling preferences towards other dwelling types (a), Noosa Shire, 2011-2036

Household Type	Separate House	Semi-Detached		Attached Dwellings	
	Small	Small	Large	Small	Large
Small Households					
Couple family with children with 3 people usually resident	50%	25%	25%		
Couple family with no children		25%	25%	50%	
Lone parent family with 2 people usually resident	50%	25%		25%	
Lone person households		50%		50%	
Group household with 2 people usually resident	20%	20%	20%	20%	20%
Large Households					
Lone parent family with 3+ people usually resident	75%		25%		

Note: The proportions shown in the table are the assumed change in dwelling preferences towards other dwelling types for each household type. Therefore each row adds to 100%. As an example, for couples with no children moving away from separate houses it is assumed that 50% would move to small attached dwellings, 25% would move to small semi-detached dwellings and 25% would move to large semi-detached dwellings.

The change in dwelling mix would occur over time, not all at once, and as the market responds. It is assumed that the change (if made possible by the scheme and picked up by the development industry) would occur over the planning horizon of the housing needs assessment, that is, to 2036. The change in dwelling preferences is assumed to occur according to the table below (**Table 56**). A small amount of change in dwelling preferences is assumed to occur by 2016 given that the 'jump off' year for the projections was 2011.

Table 56. Assumed change in dwelling preferences over time, Noosa Shire, 2016-2036

Household Type	2016	2021	2026	2031	2036
Rate of Change	10%	30%	50%	75%	100%

Table 57 below summarises the resulting dwelling mix for all years from 2011 to 2036 given these assumptions. As above, 'small' dwellings are one to two bedrooms, and 'large' dwellings are three or more ('3+') bedrooms.

The tables in **Appendix B** show the resulting dwelling mix in 2036 given these assumptions as a percentage (**Table 1** to **Table 3**), and as dwelling numbers (**Table 4** to **Table 6**).



Table 57. Projected dwelling mix to meet assumed resident household needs, No, low and high change scenarios, Noosa Shire, 2011-2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
No Change												
2011	1,775	15,062	16,836	1,237	791	2,028	1,504	496	2,001	218	69	287
2016	1,904	15,943	17,847	1,333	849	2,182	1,620	529	2,149	235	73	308
2021	1,962	16,329	18,291	1,376	876	2,251	1,672	544	2,215	243	75	318
2026	2,036	16,856	18,892	1,430	908	2,339	1,738	562	2,300	253	78	331
2031	2,092	17,248	19,339	1,473	933	2,407	1,792	576	2,368	261	80	341
2036	2,134	17,574	19,708	1,504	952	2,456	1,829	587	2,416	266	82	348
Low Change												
2011	1,775	15,062	16,836	1,237	791	2,028	1,504	496	2,001	218	69	287
2016	1,922	15,806	17,728	1,371	874	2,245	1,675	530	2,205	235	73	308
2021	2,018	15,905	17,923	1,495	951	2,446	1,842	547	2,389	243	75	318
2026	2,131	16,125	18,256	1,636	1,038	2,674	2,032	568	2,600	253	78	331
2031	2,238	16,123	18,361	1,791	1,133	2,923	2,244	585	2,829	261	80	341
2036	2,333	16,046	18,379	1,936	1,222	3,158	2,443	599	3,043	266	82	348



Household Type	Separate House			Semi-Detached		Attached			Other Dwelling Type			
High Change												
2011	1,775	15,062	16,836	1,237	791	2,028	1,504	496	2,001	218	69	287
2016	1,940	15,669	17,610	1,410	898	2,308	1,730	532	2,261	235	73	308
2021	2,073	15,482	17,555	1,614	1,026	2,640	2,011	551	2,562	243	75	318
2026	2,226	15,394	17,620	1,842	1,168	3,010	2,326	574	2,900	253	78	331
2031	2,384	14,999	17,383	2,108	1,332	3,440	2,696	595	3,291	261	80	341
2036	2,533	14,519	17,051	2,367	1,492	3,859	3,058	612	3,670	266	82	348

Notes: The figures in this table are accumulative which means that each year's figures build on and include the figures for prior all years. For example, in the low change scenario, there is estimated to be a shortfall of 57 small houses at 2016 compared to assumed population needs, this changes to an estimated shortfall of 153 small houses at 2021. There is no need to sum the figures to provide the overall shortfall at 2021, the figure shown is the total shortfall at that year.

Source: Briggs & Mortar analysis based on Queensland Government household and dwelling projections, 2015 edition (Queensland Government 2016h);



The resulting changes in dwelling mix by dwelling type for residents are shown diagrammatically in **Figure 58** below. Dwellings classified as 'other' dwellings are not shown in this figure as they are the same for all scenarios. The resulting change in dwelling mix by dwelling size for residents is shown in **Figure 59** below.

Figure 58. Projected change in dwelling type mix to meet assumed resident household needs, Noosa Shire, 2011-2036

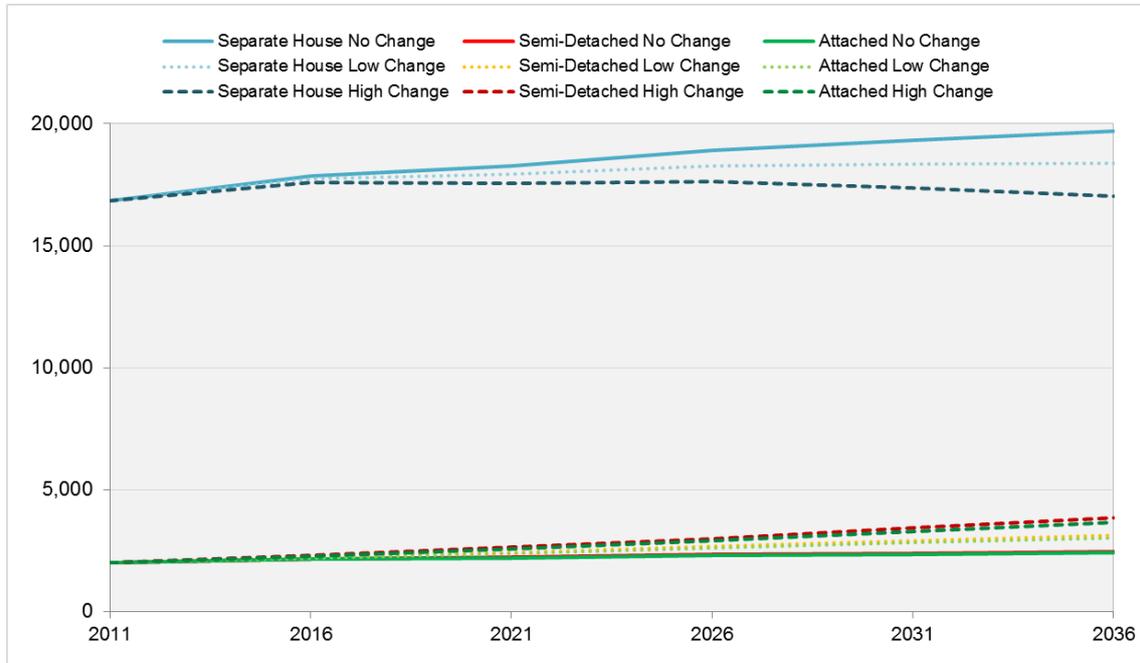
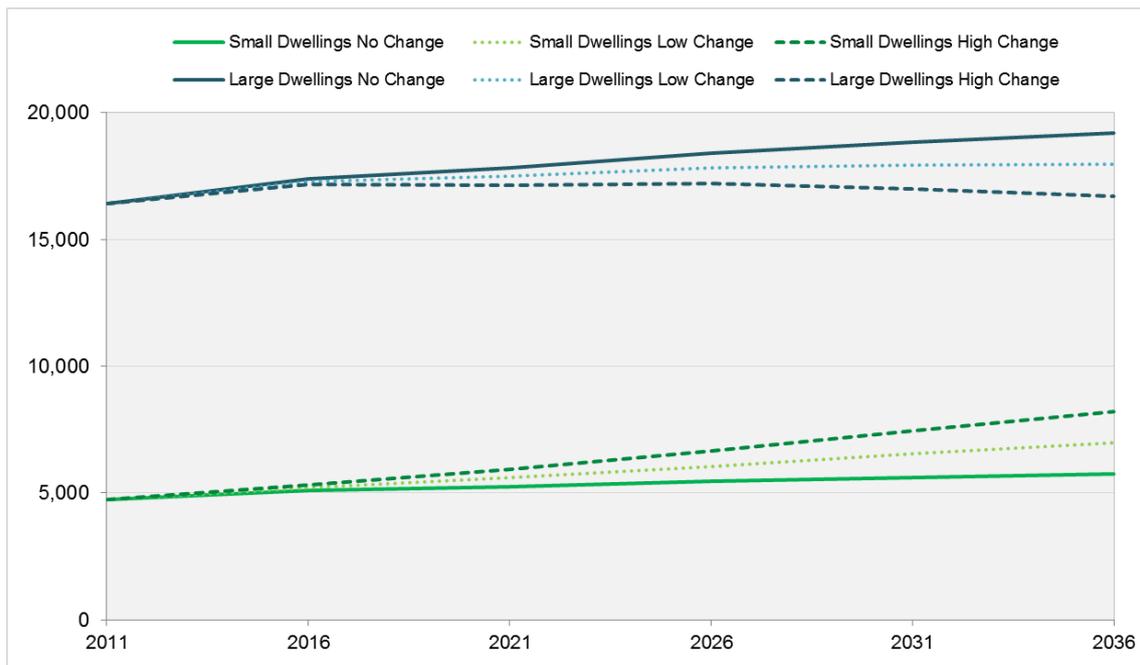


Figure 59. Projected change in dwelling size mix to meet assumed resident household needs, Noosa Shire, 2011-2036



The projected dwelling mix for the no change, low change and high change scenarios are shown in **Figure 60** to **Figure 62** below.

Figure 60. Projected dwelling mix to meet assumed resident household needs, No change scenario, Noosa Shire, 2011-2036

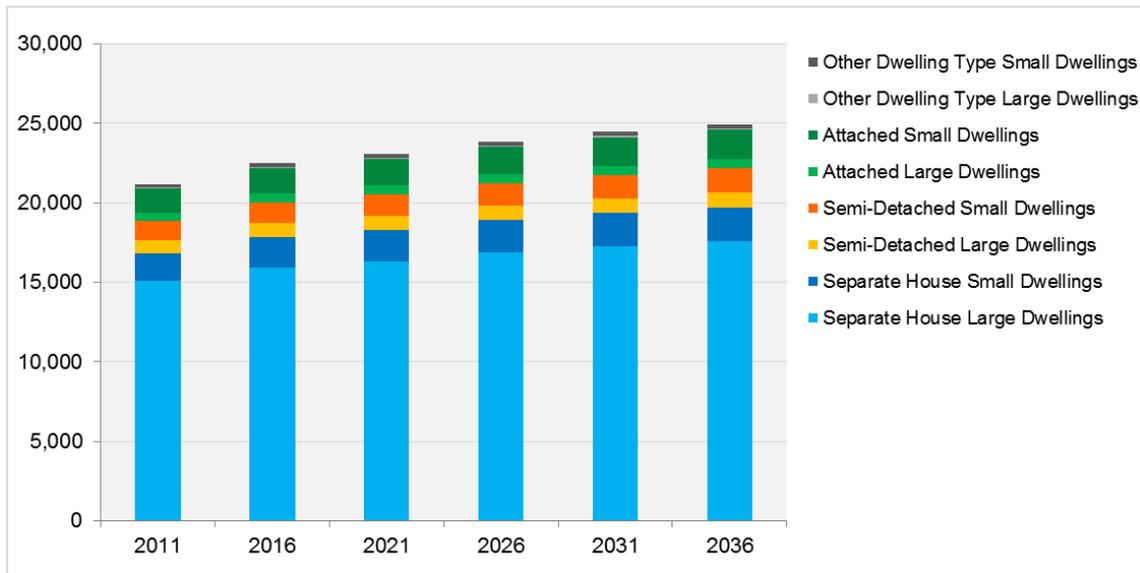


Figure 61. Projected dwelling mix to meet assumed resident household needs, Low change scenario, Noosa Shire, 2011-2036

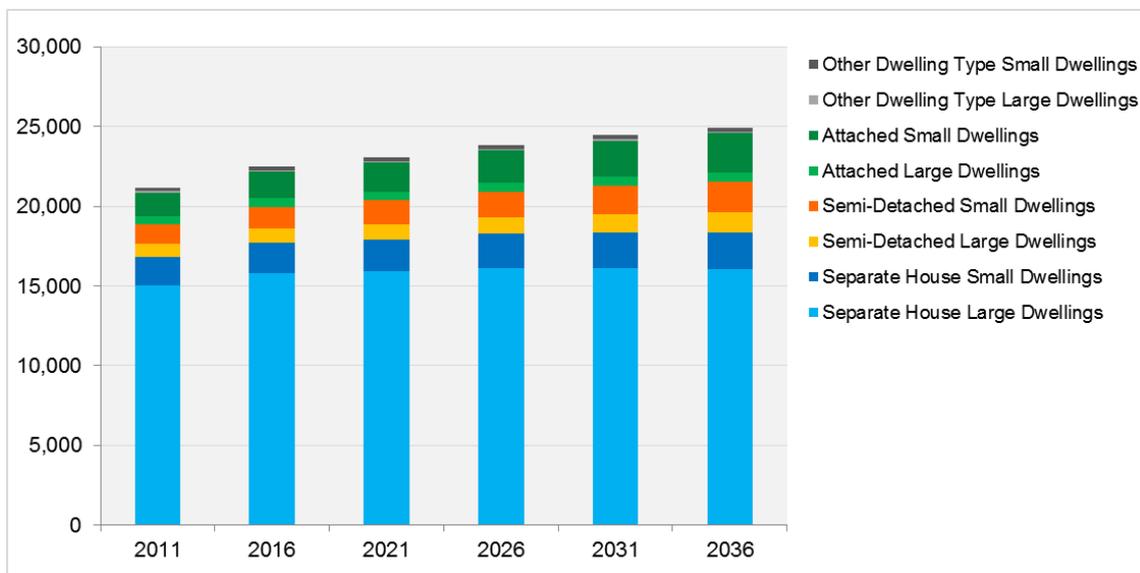
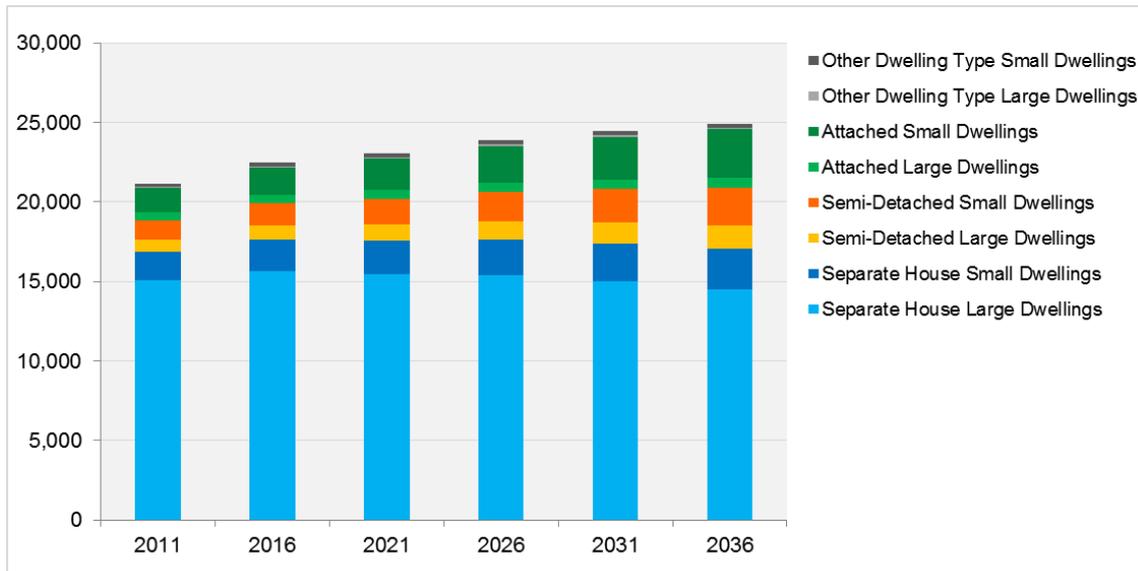


Figure 62. Projected dwelling mix to meet assumed resident household needs, High change scenario, Noosa Shire, 2011-2036



As noted, the dwelling projections use 2011 as the jump off year. Some construction of new dwellings has occurred since 2011 in Noosa Shire. Data on the number of new dwelling approvals has been used as an indication of this construction activity between 2011 and 2016. Bedroom numbers were not included in approvals data, however these have been assumed based on the approved gross floor area, with dwellings that are less than 100m² assumed to be small dwellings (one to two bedrooms), and dwellings 100m² or larger assumed to be large dwellings (3+ bedrooms).

The resulting projected additional dwelling needs are shown in **Table 58** below. As can be seen, a large proportion of dwelling approvals between 2011 and 2016 were for separate houses, and this has resulted in, even under the no change scenario, a current estimated 'oversupply'²⁶ of separate houses. Very few semi-detached dwellings were approved during the period, and therefore the projected need for additional semi-detached dwellings at 2016 is higher under the no change scenario than for attached dwellings. Under the no change scenario, the 'oversupply' of separate houses is taken up quickly, and additional separate houses are required from 2021.

For the low and high change scenario, which assume a greater shift away from detached dwellings to other dwelling types, the 'oversupply' of separate houses exists for longer, and under the high change scenario the 'oversupply' of separate houses grows over time.

²⁶ It should be noted in this section that the terms oversupply and undersupply are used to describe the mismatch in projected need (based on the assumed preferences of particular household types for particular dwellings under each scenario) and the current supply of dwellings at 2016.



Table 58. Projected additional dwelling need to meet assumed resident household needs, No, low and high change scenario, Noosa Shire, 2016-2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type			Total
	Dwelling Size	Small	Large	Total	Small	Large	Total	Small	Large	Total	Small	Large	
Net dwellings approved (1 July 2011-30 June 2016)	90	1,128	1,218	2	0	2	40	61	101	4	0	4	1,325
No Change													
2016	-39	247	207	-94	-58	-152	-76	28	-47	-13	-4	-17	-9
2021	-97	-139	-237	-137	-85	-221	-128	13	-113	-21	-6	-27	-598
2026	-171	-666	-838	-191	-117	-309	-194	-5	-198	-31	-9	-40	-1,385
2031	-227	-1,058	-1,285	-234	-142	-377	-248	-19	-266	-39	-11	-50	-1,978
2036	-269	-1,384	-1,654	-265	-161	-426	-285	-30	-314	-44	-13	-57	-2,451
Low Change													
2016	-57	384	326	-132	-83	-215	-131	27	-103	-13	-4	-17	-9
2021	-153	285	131	-256	-160	-416	-298	10	-287	-21	-6	-27	-599
2026	-266	65	-202	-397	-247	-644	-488	-11	-498	-31	-9	-40	-1,384
2031	-373	67	-307	-552	-342	-893	-700	-28	-727	-39	-11	-50	-1,977
2036	-468	144	-325	-697	-431	-1,128	-899	-42	-941	-44	-13	-57	-2,451



Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type			Total
	Dwelling Size	Small	Large	Total	Small	Large	Total	Small	Large	Total	Small	Large	Total
High Change													
2016	-75	521	444	-171	-107	-278	-186	25	-159	-13	-4	-17	-10
2021	-208	708	499	-375	-235	-610	-467	6	-460	-21	-6	-27	-598
2026	-361	796	434	-603	-377	-980	-782	-17	-798	-31	-9	-40	-1,384
2031	-519	1,191	671	-869	-541	-1,410	-1,152	-38	-1,189	-39	-11	-50	-1,978
2036	-668	1,671	1,003	-1,128	-701	-1,829	-1,514	-55	-1,568	-44	-13	-57	-2,451

Notes: This table shows the total shortfall over assumed provision at 2016. Figures are accumulative²⁷. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

Source: Briggs & Mortar analysis based on Queensland Government household and dwelling projections, 2015 edition (Queensland Government 2016h);

²⁷ The figures in this table are accumulative which means that each year's figures build on and include the figures for prior all years. For example, in the low change scenario, there is estimated to be a shortfall of 57 small houses at 2016 compared to assumed population needs. This changes to an estimated shortfall of 153 small houses at 2021. There is no need to sum the figures to provide the overall shortfall at 2021, the figure shown is the total shortfall at that year.



It would seem from the above that the desirable scenario is the low scenario, where the balance of separate houses is fairly neutral i.e. there are enough larger houses still to satisfy demand, but a higher increase in smaller houses. Under this scenario, a small increase in larger new housing will still be able to occur between 2016 and 2036, other than by replacement of older dwellings. A completely neutral situation would make the best use of the limited land stocks still available, and best meet housing needs. However the low scenario would allow some small ongoing new growth of large houses.

The low change scenario is possibly the most realistic for the Shire given that it results in a small oversupply in large houses. The high change scenario suggests a significant oversupply of large houses, which may be absorbed by the market but will mean a proportion of households will still live in unaffordable housing types.

The low change scenario suggests that the preferred mix of additional dwellings to 2036 to meet assumed resident household needs would be as follows:

- Only a small increase in detached houses may be required, other than by replacement of existing older dwellings;
- This small increase in detached housing should desirably be mostly by small, not large dwellings (this includes those in retirement villages and manufactured home parks, and innovative dwelling design and materials) and the remaining subdivision lot size should reflect the need for small dwellings;
- There is a further need for semi-detached dwellings, mainly small, but also three or more bedroom to provide additional housing choice; and
- There is a significant need for small attached dwellings (one to two bedroom) to offer additional housing options for a growing number of small households.

6.4.3 Future Dwelling Needs for Tourists/Visitors

As well as considering the needs of residents in Noosa Shire, it is important that growth in tourism is considered due to the potential impacts that demand for tourist accommodation can have on the residential market. At the same time, it is important that the needs of tourism, as Noosa Shire's largest industry, are catered for as far as possible with the limited land stocks available, into the future.

There are considered to be two ways in which changes in tourism may impact residential dwelling provision:

- Firstly, growth in tourist numbers may outstrip the supply of accommodation for tourists and therefore this demand may 'spill over' into resident accommodation. With online tools to rent out spare rooms and whole dwellings to tourists, there are fewer barriers for dwelling owners to convert accommodation from rented accommodation for residents to short term tourist accommodation/visitor dwellings. There are two markets for tourist/visitor accommodation:
 - Tourist accommodation specifically built for tourists, such as holiday resorts, motels, and hotels (termed 'tourist accommodation' in this report);
 - Other accommodation used by visitors, including apartments, townhouses and houses (termed 'visitor dwellings' in this report).
- Secondly, it is recognised that some residents live in resort style accommodation in Noosa Shire. It appears that a small proportion of these dwellings may not be included in Census data and therefore are not considered in the resident dwellings projections modelled



above. If the demand for tourism accommodation grows, more of this accommodation may be rented to tourists rather than being used for residents to live in.

This section attempts to quantify the impacts that tourism may have on housing needs if current levels of demand were to continue, and supply of tourist accommodation was able to increase unchecked. This is considered an extremely unlikely scenario, not only because of restrictions to land supply which will physically limit tourist accommodation provision, but also because community reaction to increased congestion and events etc. is likely to demand some form of limitation. This would be in line with Council's Sustainability Principles (Section 1.4) which aim to protect the lifestyle of the community and its unique environment.

The Local Economic Plan (Noosa Council, 2015a) was developed consistent with Council's Sustainability Principles, and the reining in of uncontrolled tourism accommodation demand would be in line with the principles of the Plan. It was noted in Section 2.3.5 that this plan looks beyond tourism-driven economic growth and employment, towards a more resilient and diversified economy. Growing the economy is not considered a 'develop at all cost scenario' but rather a dedicated plan to grow the value of priority industry sectors, by achieving growth in 'smart' industry sectors that have high economic value and low environmental impact, while recognising and supporting sustainable tourism as an ongoing key economic driver. Hence it will be important to provide this balance in accommodation supply in the New Noosa Plan.

Supply and demand in tourist accommodation and visitor dwellings

Tourist accommodation (motels, hotels, B&B and holiday resorts)

As noted in Section 4.1.8, determining the actual amount of tourism accommodation in the Shire is difficult. The most conservative count of tourist accommodation rooms/units suggests that there were around 2,000 rooms/units at June 2015. This figure only includes tourist accommodation establishments with 15 or more rooms/units. These rooms had an occupancy rate of 61% in the year to 30 June 2015.

As discussed in Section 6.3.5, continued growth in total visitor nights is assumed to be 2.5% to 2036. This compounding growth rate has been applied to the average number of occupied rooms during the year (at 61% occupancy) as an indicator of the need or demand for tourist accommodation.

Assuming continued growth in total visitor nights of 2.5% to 2036, this form of tourist accommodation during the period equates to a need for 1,360 additional rooms by 2036 (**Table 59**). However such growth is neither necessarily realistic nor sustainable.

It was calculated by Council that an additional 428 units may be provided as part of the Settler's Cove site. This estimate was based on density calculations and site areas. It was assumed that these would be provided by 2021.



Table 59. Assumed need for tourist accommodation (rooms in resorts, motels, hotels, etc.), Noosa Shire, 2016-2036

Year	DEMAND			SUPPLY	NEED
	Assumed Annual Tourist Growth Rate	Assumed Total Demand (at current occupancy)	Assumed Additional Demand	Assumed New Supply (New Resorts)	Assumed Need
2016	2.5%	2,051	-50	0	-50
2021	2.5%	2,321	-320	428	108
2026	2.5%	2,625	-624	428	-196
2031	2.5%	2,970	-969	428	-541
2036	2.5%	3,361	-1,360	428	-932

Notes: Excludes all tourism accommodation establishments with fewer than 15 rooms. This table shows the total need over assumed provision at 2015. Figures are accumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

It has also been assumed that there is some excess capacity in existing tourist accommodation establishments given the occupancy rates of tourist accommodation in Noosa Shire. Occupancy rates were reviewed in Section 4.1.8. If occupancy rates were to increase slowly from 60% on average per year in 2016, to a maximum of 80% per year in 2036, some of this need would be met. The result of this scenario is shown in **Table 60** below. This maximum occupancy assumption has been used in future sections of this modelling chapter.

Table 60. Assumed need for tourist accommodation (rooms in resorts, motels, hotels, etc.) (with increased occupancy to 80%), Noosa Shire, 2016-2036

Year	DEMAND			SUPPLY	NEED
	Assumed Annual Tourist Growth Rate	Assumed Total Demand (at increasing occupancy to 80%)	Assumed Additional Demand	Assumed New Supply (New Resorts)	Assumed Need
2016	2.5%	2,051 (61%)	-50	0	-50
2021	2.5%	2,153 (66%)	-152	428	276
2026	2.5%	2,272 (71%)	-271	428	157
2031	2.5%	2,408 (75%)	-407	428	21
2036	2.5%	2,563 (80%)	-562	428	-134

Notes: Excludes all tourism accommodation establishments with fewer than 15 rooms. This table shows the total need over assumed provision at 2015. Figures are cumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

Residents living in resort style accommodation not previously considered

From consultations with resort managers, there were assumed to be some 250 dwellings within resort style accommodation that were currently occupied by residents in 2016. Three scenarios



have been developed to consider the movement of residents out of this accommodation if it were to be used increasingly for tourist uses. These scenarios are based on the trends understood to be occurring through consultation with tourism providers, increasing visitor occupancy rates and likely future trends in occupancy rates as a result of increased visitor demand. The low change scenario therefore assumes that 50% of permanent resident households will move out of resort style accommodation by 2036, 70% for the medium change scenario and 90% for the high change scenario (**Table 61**). Many of these households are likely to be renting.

Table 61. Assumptions about movement out of resorts

Year	Low Change	Medium Change	High Change
2016-2021	12.5%	17.5%	22.5%
2021-2026	25.0%	35.0%	45.0%
2026-2031	37.5%	52.5%	67.5%
2031-2036	50.0%	70.0%	90.0%

According to these assumptions, this would result in additional capacity in existing resorts of 125 rooms for the low change scenario, 175 rooms for the medium change scenario and 225 rooms for the high change scenario (**Table 62**). It is considered that the medium change scenario may be the most appropriate. It is notable that this future is however dependent on the ability to increase supply in alternative small, affordable resident accommodation.

Table 62. Additional capacity in existing resorts, additional need in residential market, Noosa Shire, 2011-2036

Year	Additional Capacity in Tourist Accommodation / Additional Need in Residential Market		
	Low Change	Medium Change	High Change
2016	0	0	0
2021	31	44	56
2026	63	88	113
2031	94	131	169
2036	125	175	225

Visitor dwellings (residential dwellings generally used by visitors)

It was identified in Section 4.1.8 that there were assumed to be some 4,777 attached visitor dwellings (dwellings normally occupied by visitors) in 2014 according to Council's DMaTT model. The DMaTT model also identified 4 detached visitor dwellings, however this was considered to undercount the number of detached visitor dwellings substantially. Therefore data from the Census has been used to estimate the number of detached visitor dwellings. Census data suggests that there were some 2,017 detached visitor dwellings in 2011 (700 detached dwellings occupied by visitors on Census night, and 1,317 detached dwellings unoccupied on Census night



but assumed to be normally occupied by visitors²⁸). To accord with the DMaTT model's base year of 2014, the provision of detached visitor dwellings between 2011 and 2014 was assumed to have grown at 2.5% per year, with no change in the occupancy rate during this period.

This resulted in a total of approximately 7,300 visitor dwellings in 2016. In the event that continued ongoing growth in total visitor nights of 2.5% each year to 2036 occurred, additional demand, if left unchecked, for this form of accommodation could grow to around 5,000 dwellings by 2036 (**Table 63**).

Council's DMaTT model includes assumptions about new supply of visitor dwellings from 2014 and this has been used as an indication of possible future availability. DMaTT estimated that this supply could increase to 5,193 attached visitor dwellings in 2036 and an ultimate figure of 5,648 attached visitor dwellings. For detached dwellings, DMaTT identified capacity for one additional detached visitor dwelling, and this again has been excluded from the analysis as it understates capacity. If the estimated new supply for attached dwellings is delivered to 2036, the need for visitor dwellings falls to around 4,600 dwellings at 2036 (**Table 63**).

Table 63. Assumed need for visitor dwellings, Noosa Shire, 2016-2036

Year	DEMAND			SUPPLY	NEED
	Assumed Annual Tourist Growth Rate	Assumed Total Demand (at current occupancy)	Assumed Additional Demand	Assumed New Supply (DMaTT)	Assumed Need
2016	2.5%	7,301	-352	149	-203
2021	2.5%	8,260	-1,311	282	-1,029
2026	2.5%	9,346	-2,397	368	-2,029
2031	2.5%	10,574	-3,625	393	-3,232
2036	2.5%	11,963	-5,014	416	-4,598

Notes: This table shows the total need over assumed provision at 2014. Figures are cumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

It has also been assumed that there is some excess capacity in existing visitor dwellings establishments given the occupancy rates of tourist accommodation in Noosa Shire. Although occupancy data is not available for visitor dwellings for the full year, at the time of the Census it has been estimated that occupancy was around 40%. Given higher occupancy rates in summer, it has been assumed that the occupancy rate for visitor dwellings for the full year may be 50%. A similar occupancy increase to that used for tourist accommodation (20% points) has been used to give an indication of the impact that an increase in occupancy rates can have on the overall need

²⁸ This has been calculated in three steps: (1) estimating the breakdown between total unoccupied resident and unoccupied visitor dwellings based on the difference in dwelling counts in the census, and household estimates from Queensland Treasury data, (2) assuming that unoccupied resident dwellings have a similar dwelling mix breakdown to occupied resident dwellings, and (3) calculating the difference between the mix of unoccupied dwellings and the assumed mix of unoccupied resident dwellings.



for additional visitor dwelling supply. The result of this scenario is shown in **Table 60** below. This maximum occupancy assumption has been used in future sections of this modelling chapter.

Table 64. Assumed need for visitor dwellings (with increased occupancy from 50% to 70%), Noosa Shire, 2016-2036

Year	DEMAND			SUPPLY	NEED
	Assumed Annual Tourist Growth Rate	Assumed Total Demand (at increasing occupancy to 70%)	Assumed Additional Demand	Assumed New Supply (DMaTT)	Assumed Need
2016	2.5%	7,301 (50%)	-352	149	-203
2021	2.5%	7,509 (55%)	-560	282	-278
2026	2.5%	7,788 (60%)	-839	368	-471
2031	2.5%	8,134 (65%)	-1,185	393	-792
2036	2.5%	8,545 (70%)	-1,596	416	-1,180

Notes: This table shows the total shortfall over assumed provision at 2014. Figures are cumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

Overall need for tourist accommodation and visitor dwellings

If the demand for tourist accommodation and visitor dwellings continued to grow in line with past trends, a higher number of residential dwellings may be used for tourist accommodation and this would reduce the amount of residential dwelling stock available for residents. Some of this demand for tourist accommodation may be met by the movement of residents out of tourist accommodation, by reduced vacancy rates in the residential market allowing increased use by visitors, or by considering visitor uses for 'spare' development capacity in the residential market (development capacity in the residential market is considered separately in section 6.5.1 below). **Table 65** summarises the overall need for tourist accommodation and visitor dwellings given the assumptions described above.

At 2036, the assumptions would result in a surplus of tourist accommodation (motel, hotel and holiday resorts) of around 40 tourist accommodation rooms, but a need for around 1,180 visitor dwellings. Therefore the total projected need for tourist accommodation and visitor dwellings would be estimated to be around 1,140 additional rooms/dwellings²⁹ by 2036, in the event that ongoing growth in tourism demand should continue in line with that over the last decade, at 2.5% per year.

Again it is stressed that this is a projected future only should existing trends continue at the rate experienced over the last decade. It is **not** seen as a desirable future, nor in line with Council sustainability policies, and it is not recommended that this should be accommodated in land use

²⁹ The study has not differentiated between whether a visitor night is spent in a room or in unit. The numbers of actual visitors will obviously differ, but the demand for new accommodation has been derived by simply applying the increase in visitor numbers to existing accommodation and extrapolating that forward. It is therefore assumed that the accommodation mix remains constant.



planning. The assessment shows that continued increase in tourist accommodation to meet an increase in visitation of 2.5% per annum would not be sustainable in terms of accommodation provision.

Table 65. Assumed overall need for tourist accommodation and visitor dwellings, Noosa Shire, 2016-2036

Year	Tourist Accommodation			Visitor Dwellings		NEED
	Additional Need (with 2.5% annual growth)	New Resort Supply	Retrieved Capacity in Resorts (Medium Change)	Additional Demand (with 2.5% annual growth)	New Supply (DMaTT)	Need for Tourist/ Visitor Dwellings
2016	-50	0	0	-352	149	-253
2021	-152	428	44	-560	282	42
2026	-271	428	88	-839	368	-226
2031	-407	428	131	-1,185	393	-640
2036	-562	428	175	-1,596	416	-1,139

Notes: This table shows the total shortfall over assumed provision at 2014/15. Figures are accumulative³⁰. Negative figures show additional need or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

6.5 Opportunities for Meeting Future Housing Needs

6.5.1 Meeting Resident Needs

There are assumed to be two ways to meet resident dwelling stock needs – through the take-up of secondary dwelling provisions, and new stock (infill/greenfield development).

Secondary Dwellings

Additional secondary dwellings may help to meet the dwelling needs of the future Noosa Shire population. Secondary dwellings have traditionally been supported where the occupant of the secondary dwelling is related to the occupant of the primary dwelling; hence the reason these dwellings have been termed 'granny flats'.

³⁰ As above, the figures in this table are accumulative which means that each year's figures build on and include the figures for prior years. For example, in 2016 the DMaTT model estimated that there could be an additional 149 visitor dwellings of supply, and by 2021 this new supply would increase to a total of 282 visitor dwellings (an increase of 133 visitor dwellings during this five year period). There is no need to sum the figures to provide the overall additional supply at 2021, the figure shown is the total new supply at that year. Similarly with the total shortfall in tourist/visitor dwellings, the estimated need at 2031 is estimated to be 640 tourist/visitor dwellings compared to assumed supply, and this increases to a total need of 1,139 tourist/visitor dwellings at 2036 (an increase in the shortfall of 499 tourist/visitor dwellings during this five year period).



At the time of certification and on an ongoing basis, it is difficult to determine the relationships between occupants and police the use of dwellings based on this requirement. It has also been argued that the impacts on neighbours or surrounding uses are not significantly different based on the relationships between the occupants of the dwellings.

Removing the requirement for occupants to be related to each other (as has been done in scheme amendments commenced on 28 Oct 2016) may increase the supply of this form of development and increase the supply of affordable dwellings in the Shire.

A recent analysis by Noosa Shire Council found that some 18,231 lots in the Shire were within the detached housing, rural settlement and rural zones and of a size that may support a secondary dwelling. A proportion of these lots may be suitable for accommodating a secondary dwelling.

Two scenarios were developed: a high take-up scenario, and a low take-up scenario.

- The high take up scenario assumes that during the time period 2016-2036, 20% of these lots are used to provide additional secondary dwellings for residents, and 10% for tourists in the urban areas of the Shire. In the rural areas, it was assumed that 6% of these lots may be used to provide additional secondary dwellings for residents.
- The low take-up scenario assumes that during the time period 2016-2036, 10% of these lots are used to provide additional secondary dwelling for residents, and 10% for tourists in the urban areas of the Shire. In the rural areas, it was assumed that 3% of these lots may be used to provide additional secondary dwellings for residents.

The results of these two scenarios are provided in **Table 66** and **Table 67** below. For the high take-up scenario, these assumptions would result in an additional 2,550 resident dwellings being provided between 2016 and 2036, and 1,040 visitor dwellings. For the low take-up scenario, an additional 1,275 resident dwellings would be provided, and 559 visitor dwellings. It is considered that the low take-up scenario may be more realistic than the high take-up scenario, and under current provisions even the low take-up scenario may not be reached.

Table 66. Assumed additional secondary dwellings, High take-up scenario, Noosa Shire, 2016-2036

Area	Total Possibly Suitable Lots for Secondary Dwellings (a)	Proportion and number of assumed secondary dwelling for residents		Proportion and number of assumed secondary dwelling for visitors	
Total 2016-2036					
Urban Areas	10,399	20%	2,080	10%	1,040
Hinterland	7,832	6%	470	1%	78
Noosa Shire	18,231	NA	2,550	NA	1,040
Each 5 year period 2016-2036					
Urban Areas	10,399	5%	520	2.5%	260
Hinterland	7,832	1.5%	117	0.25%	20
Noosa Shire	18,231	NA	637	NA	280

Notes: a = Total possibly suitable lots are lots located in the detached housing, rural settlement and rural zones with an area greater than an arbitrary 600m². A proportion of these lots will be unsuitable for a secondary dwelling given various policy and practical constraints.



Table 67. Assumed additional secondary dwellings, Low take-up scenario, Noosa Shire, 2016-2036

Area	Total Possibly Suitable Lots for Secondary Dwellings (a)	Proportion and number of assumed secondary dwelling for residents		Proportion and number of assumed secondary dwelling for visitors	
Total 2016-2036					
Urban Areas	10,399	10%	1,040	5%	520
Hinterland	7,832	3%	235	0.5%	39
Noosa Shire	18,231	NA	1,275	NA	559
Each 5 year period 2016-2036					
Urban Areas	10,399	3%	260	1.25%	130
Hinterland	7,832	0.75%	59	0.125%	10
Noosa Shire	18,231	NA	319	NA	140

Notes: a = Total possibly suitable lots are lots located in the detached housing, rural settlement and rural zones with an area greater than an arbitrary 600m². A proportion of these lots will be unsuitable for a secondary dwelling given various policy and practical constraints.

New Stock to Meet Future Resident Households Needs

The assumed need for new stock to meet assumed resident household needs is outlined below in **Table 68**. This table summarises the assumptions outlined above regarding assumed resident needs (low change scenario), additional demand from resident households vacating resorts (medium change assumptions), and additional capacity due to new secondary dwellings (low take-up assumptions). Although secondary dwellings may be classified as attached dwellings under the census definitions they are considered to meet the needs of resident households for both small semi-detached and small attached dwellings and therefore have been split between these two dwelling types as outlined below.



Table 68. Additional new dwelling stock required to meet assumed resident household needs, Noosa Shire, 2016-2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type			Total
	Dwelling Size	Small	Large	Total	Small	Large	Total	Small	Large	Total	Small	Large	Total
A. Demand – Assumed Resident Dwelling Needs (Low Change Scenario)													
2016	-57	384	327	-132	-83	-215	-131	27	-104	-13	-4	-17	-9
2021	-153	285	132	-256	-160	-416	-298	10	-288	-21	-6	-27	-599
2026	-266	65	-201	-397	-247	-644	-488	-11	-499	-31	-9	-40	-1,384
2031	-373	67	-306	-552	-342	-894	-700	-28	-728	-39	-11	-50	-1,977
2036	-468	144	-324	-697	-431	-1,128	-899	-42	-941	-44	-13	-57	-2,451
B. Demand – Assumed Additional Demand from Residents Vacating Resorts													
2016	0	0	0	0	0	0	0	0	0	0	0	0	0
2021	0	0	0	0	0	0	-44	0	-44	0	0	0	-44
2026	0	0	0	0	0	0	-88	0	-88	0	0	0	-88
2031	0	0	0	0	0	0	-131	0	-131	0	0	0	-131
2036	0	0	0	0	0	0	-175	0	-175	0	0	0	-175
C. Supply - Additional Capacity as New Secondary Dwellings (Low Take Up Scenario)													
2016	0	0	0	0	0	0	0	0	0	0	0	0	0
2021	0	0	0	159	0	159	159	0	159	0	0	0	319
2026	0	0	0	319	0	319	319	0	319	0	0	0	638
2031	0	0	0	478	0	478	478	0	478	0	0	0	956
2036	0	0	0	638	0	638	638	0	638	0	0	0	1,275



Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type			Total
Dwelling Size	Small	Large	Total	Small	Large	Total	Small	Large	Total	Small	Large	Total	Total
D. Assumed Need for New Stock													
2016	-57	384	327	-132	-83	-215	-131	27	-104	-13	-4	-17	-9
2021	-153	285	132	-97	-160	-257	-183	10	-173	-21	-6	-27	-324
2026	-266	65	-201	-78	-247	-325	-257	-11	-268	-31	-9	-40	-835
2031	-373	67	-306	-74	-342	-416	-353	-28	-381	-39	-11	-50	-1,152
2036	-468	144	-324	-60	-431	-491	-437	-42	-479	-44	-13	-57	-1,351
2036 (with % of Total)		-324 (24.0%)			-491 (36.3%)			-479 (35.5%)			-57 (4.2%)		-1,351 (100%)

Notes: This table shows the total shortfall over assumed provision at 2016. Figures are accumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).



Hence new stock would be required to fill the remaining need for resident dwellings. Of the 1,351 new dwellings required to meet assumed resident household needs between 2016 and 2036, the modelling suggests this would desirably include:

- 24% detached houses;
- 36% semi-detached dwellings, the majority small, but some 3+ bedrooms;
- 32% small attached dwellings and 42 (3%) large attached dwellings; and
- 4% of dwellings of other types (cabin, caravans, dwelling attached to shop etc),

Comparison with DMaTT Capacity Analysis

It is emphasised that the purpose of the above analysis has been to establish recommendations for dwelling diversity, rather than quantifying future resident dwelling projections themselves. The QT projections were used as the basis of this modelling. However modelling undertaken by Unitywater using their Demand Modeller and Tracking Tool (DMaTT) (2016) provides information on the potential capacity for new residential development under the current Noosa Plan to meet the needs of future residents, and this is reported here for comparison.

DMaTT suggests that the ultimate potential for further development under the Noosa Plan for resident dwellings is some 4,667 additional dwellings post-2016 (given a range of assumptions). This includes 1,404 detached dwellings (30%), and 3,263 attached dwellings (70%). The model suggests that 3,235 dwellings could be provided by 2036 under the Noosa Plan, including 987 detached dwellings (31%) and 2,248 attached dwellings (69%). This additional capacity for resident dwellings in Noosa Shire would meet the assumed need for new resident dwelling stock if these were able to be provided during the forecasted periods.

A comparison of the modelling of capacity undertaken using the DMaTT model, and need undertaken as outlined above in this analysis, is shown in **Table 69**. As the DMaTT model only includes a split between attached and detached dwellings, semi-detached, attached and 'other dwelling types' have been grouped together as attached dwellings. The results in the table have been adjusted to note additional capacity (DMaTT) and need (Needs Assessment Model) over the assumed provision at 2016. The comparison suggests that there is some capacity within the Shire under the current Noosa Plan to meet the needs of the projected future resident population if the assumptions used in the analysis play out as outlined. However, more analysis would need to be undertaken before relying on this comparison.

The limitations of the DMaTT model have been previously outlined, and there are key differences in the methodologies used to identify dwellings used for residents and visitors between the DMaTT model and the Needs Assessment Model, as well as differences in the base years used in the analyses. In addition, some assumption would need to be made about the current vacancy rate among resident dwellings, and a future 'healthy level' or target level of resident dwelling vacancies, within the Shire. The validity of the method used in the DMaTT model to identify additional capacity was also not considered in this report. These differences and limitations suggest the comparison should be used with caution.



Table 69. Comparison of modelled need to meet resident household growth and capacity for resident dwellings, Noosa Shire, 2016-2036

Year	Resident Household Needs over Assumed Provision at 2016			Capacity over Assumed Provision at 2016		
	Detached	Attached	Total	Detached	Attached	Total
2016	327	-336	-9	0	0	0
2021	132	-457	-325	916	744	1,660
2026	-201	-633	-834	945	1,288	2,233
2031	-306	-847	-1,153	932	2,006	2,938
2036	-324	-1,027	-1,351	987	2,248	3,235

Notes: This table shows the total need over assumed provision at 2016. Figures are accumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black). This table has a range of limitations, including the different methodologies used to identify and project resident households/resident dwellings. It should be used with caution.

6.5.2 Meeting Tourist/Visitor Needs

In addition to allowing ongoing development of visitor accommodation supported under the Noosa Plan (in line with DMaTT projections above), there are assumed to be three ways of further increasing visitor dwelling stock:

- Through the adoption of secondary dwellings (as above);
- Identification of new 'tourist only' resort sites (i.e. sites protected for visitor accommodation);
- An increase in short term rental dwellings.

Secondary Dwellings

Additional secondary dwellings may help to meet future visitor dwelling needs. As outlined above, two scenarios were developed relating to the take up of secondary dwellings. Assumptions about the use of these secondary dwellings for visitors were also made. The high take up scenario suggested that an additional 1,040 secondary dwellings for visitors could be provided to 2036, and the low take up scenario suggested that an additional 559 secondary dwellings for visitors could be provided to 2036. The low take up scenario was considered to be more realistic and the resulting shortfall in tourist/visitor dwellings according to this scenario is outlined in **Table 70**.

Additional Resort Sites

As discussed, 'tourist only' designations were recommended to apply to only 8 resort sites in the 1997 Strategic Plan, however individual approvals have not taken consistent approaches. These sites are mostly zoned Attached or Semi Attached Housing but the use of Multiple Housing is specifically inconsistent whereas Visitor Accommodation (of various types) is consistent. They have proved problematic to control both by Council and resort managers.

A view also emerged from the consultation that such sites were simply not feasible to develop; and requests to lift the 'tourist only' restrictions on both developed and undeveloped sites have been made over the years.

It nevertheless remains as an option to designate other sites in this manner. Such a designation would however probably require use of one of the remaining larger development sites (thus



competing with residential uses), and these sites may not be well located for tourism development.

Short Term Rental Accommodation Dwellings

The value of Short Term Rental Accommodation dwellings, the potential effect of limiting them, but also the possible desirability of regulation has already been identified. The HRIA has identified that Short Term Rental Accommodation can generate visitor occupancy year round to better utilise the wasted resource of empty holiday homes, and can fill spare bedrooms created by smaller households living in larger dwellings. They can also contribute to being able to meet the insufficient accommodation for potential guests at events and festivals held in Noosa Shire.

This analysis suggests that Short Term Rental Accommodation may be important in meeting visitor dwelling needs. Should this not be regulated, it is likely that significant natural growth in the process will occur in line with trends in recent years. Possible increases in Short Term Rental Accommodation have been estimated in **Table 70**; however given the experience of other major tourist cities (such as London) it is possible that the growth will be even greater than the conservative estimates made here.

Some of the future tourist accommodation and visitor dwelling needs may be met by residents renting out spare capacity in their existing dwellings, facilitated by online platforms such as AirBnB and Stayz. In 2016, at a non-peak period, around 1,700 dwelling listings were counted on these two online platforms in Noosa Shire. Given that there may be some crossover between these two sites, and also that there may be some dwellings listed on other sites that were not considered, a figure of 1,500 dwellings used in this way was assumed for 2016. If it is assumed that these listings grow by around 5% over each 5 year projection period, this reduces the demand for additional tourist accommodation/visitor dwellings to 3,733 units/dwellings at 2036 (**Table 70**).

Overall Impact of Strategies to Meet Tourist/Visitor Needs

Secondary dwellings and short term rental dwellings may assist in meeting future visitor dwelling needs. Based on the assumptions outlined above including ongoing annual growth in visitor nights of 2.5% it is still projected that a need for some 250 tourist accommodation/visitor dwellings could exist by the end of the projection period should ongoing growth in tourism demand continue. This remains even given increased average annual occupancy in tourist accommodation to 80% and visitor accommodation to 70%, and the assumptions discussed about secondary dwellings and renting out spare capacity as Short Term Rental Accommodation.

Growth in tourist numbers may outstrip the supply of accommodation for tourists/visitors and therefore this demand may 'spill over' into resident accommodation.



Table 70. Total estimated tourist accommodation and visitor dwelling needs (including new supply due to secondary dwellings and growth in renting out spare capacity), Noosa Shire, 2016-2036

Year	DEMAND	NEW SUPPLY		ADDITIONAL NEED
	Assumed Demand for Tourist Accommodation /Visitor Dwellings	Secondary Dwellings for Tourists/Visitors	Growth in Renting Out Spare Capacity to Tourists/Visitors	Additional Need for Tourist Accommodation/ Visitor Dwellings
2016	-253	0	0	-253
2021	42	140	75	257
2026	-226	280	154	208
2031	-640	419	236	16
2036	-1,139	559	323	-257

Notes: This table shows the total need over assumed provision at 2014/15. Figures are accumulative. Negative figures show additional demand or a shortfall (shown in red). Positive figures show additional supply or an 'oversupply' (shown in black).

Implications for Housing

The overall finding of the analysis is that tourism demand could have a substantial impact on residential housing in the event of continued ongoing growth in tourism in line with that over the last decade. Considering tourism needs is a critical component of ensuring adequate and appropriate housing for residents – and vice versa.

The modelling undertaken is unable to predict, with any certainty, the demand for tourism accommodation and visitor dwellings. Rather, it demonstrates the outcome that will occur if certain assumptions are applied. The modelling has a number of limitations:

- Firstly, modelling has used a projection of the need for growth in tourism/visitor accommodation derived through a continuation of past trends (with consideration of State forecasts for other major tourism destinations (Gold Coast and Brisbane)), which are considered potentially unrealistic in Noosa Shire. If the annual growth in tourism is different – lower or higher than 2.5% each year – the outcome could change significantly. However, no other evidence-based projection was available.
- Secondly, it has been assumed that increased occupancy can be achieved in tourist and visitor accommodation. The assumptions about current and future occupancy can substantially impact the result of the modelling. In addition, higher occupancy rates may encourage the 'conversion' of resident dwellings into visitor dwellings, and thus reduce dwellings available for expected population growth. i.e. moving the issue elsewhere.
- Thirdly, the modelling relies on a number of assumptions about the future supply of tourist dwellings which may not occur including:
 - Development of the remaining identified 'tourist only' site (at Settler's Cove);
 - Development of a proportion of new tourist accommodation (in line with DMaTT projections) in existing visitor areas such as Noosaville, Noosa Heads, Sunshine Beach and Peregian Beach in residential zones;



- The movement of a proportion of permanent residents out of resorts as revenue from holiday lettings improves (due to greater demand) and the supply of alternative small permanent accommodation increases (as above);
- The take-up of secondary dwelling provisions for visitor accommodation;
- A continuing increase in dwellings used for Short Term Rental Accommodation (such as AirBnB).

It will nevertheless be important that the limits of tourist accommodation sustainability in Noosa Shire are recognised, while encouraging the future growth of the tourism industry in more sustainable ways. An unsustainable future would result in likely further competition between residents and visitors, with a possibility of increased displacement of residents and increased lack of affordability of housing. Increased sustainability is in line with the policies of the Local Economic Plan, which looks beyond tourism-driven economic growth and employment, towards a more resilient and diversified economy.

6.5.3 New Housing Models/Initiatives for Consideration

Several examples of innovative developments or new types of models that could be considered were raised throughout the consultation process or identified through a literature search. They are described in **Appendix B** and summarised below.

The 'tiny house' movement began in the late 1990s in the USA in response to housing affordability issues and sustainable living trends (Shearer 2015). The movement is also active in Australia, with local tiny house enthusiasts driven by similar ideals of economic freedom and environmental sustainability.

Small houses and temporary houses exist already in Australia, including granny flats, converted sheds, relocatable homes, beach shacks, caravans and even houseboats. Most 'tiny house' models are less than 40m² and are often built on a mobile foundation due to legal and financial constraints. This can make them difficult to control, and appeal only to a small group of users. They are consequently considered unlikely to be a viable solution to the affordability issue, and do not address the underlying issues of housing affordability. The secondary dwelling provisions adopted by Noosa Council also go a long way to addressing this requirement in an appropriately regulated manner.

'Micah Projects' provide a social assistance to people experiencing poverty, homelessness, mental illness, domestic violence, disability or discrimination. Their 'housing first' approach is an approach to addressing homelessness where housing is provided to people first, rather than people 'getting better' or moving through transitional short-term housing before a long-term housing strategy is organised. Housing first requires that suitable, long-term housing be rapidly identified and provided, together with the services that individuals and families require to continue on in this housing. Brisbane Common Ground is an example of Micah project where a 146 purpose-built apartment complex was built in South Brisbane offering both affordable housing, and housing for people who were formerly homeless. Support services and tenancy management are located on site. Common areas are provided for groups of units.

As such, the model would provide an appropriate one-off social housing response which could be implemented under rooming accommodation provisions, but is not seen as a wider scale solution to housing affordability.

'Nightingale Housing' is a social enterprise that supports, promotes and advocates for adequate housing that fosters environmental and social sustainability and strengthens communities.



Nightingale Model projects are triple-bottom-line, mixed-use apartment developments led by a group of Melbourne Architects. The ultimate goal of the projects is to provide quality value for money urban housing by simplifying both the development process and the building itself. They are funded by investor groups that have a genuine interest in quality urban housing, while making a fair and reasonable (but not excessive) return on investment.

As a social enterprise, should a group of investors propose such a model in Noosa Shire, it could be considered by Council in a potentially appropriate location such as Noosa Junction. However it is noted that rather than simplifying the development process, such projects may become embroiled in controversy. They also may not appeal to all low income households. One development, for example, has been specifically promoted to potential future residents who choose not to own a car. Each potential future resident has been made fully aware that they will not be eligible for resident parking permits. It is consequently also likely to be a 'one-off' housing response.

The 'Homes that Fit' model is spreading through Finland It provides a model for mixed housing solutions that could be considered in the planning and construction stage of aged care homes, whereby a small group of young people live together with seniors in studio apartments attached to a nursing home, in return for spending a number of hours a week with their elderly neighbours. It provides a model for mixed housing solutions that could be considered in the planning and construction of aged care homes.

The models reviewed provide interesting one-off solutions, some of which could be considered in Noosa Shire. However none were seen as providing large scale solutions to housing needs in Noosa Shire, and generally such models could already be accommodated within planning provisions subject to appropriate zoning and controls.

Development of new and innovative housing solutions will nevertheless be ongoing, and It may be necessary to allow some licence for innovation provided it meets key principles of design, function and the inherent benefits of the model.



7. RECOMMENDED ACTIONS FOR COUNCIL TO CONSIDER

7.1 Key Recommended Actions

7.1.1 Recommended Actions in Relation to Meeting Housing Needs

A number of clear policy recommendations flow from the Housing Needs Assessment (in no particular order of priority) which might be considered by Council (see box below). In several cases there may also be a need for non-Planning Scheme actions and initiatives to be considered to address needs. The Planning Scheme recommended actions for consideration are outlined in **Section 7.2**.

Recommended Actions for Consideration:

- 1. Optimal use be made of remaining available undeveloped land within the urban footprint/ town boundaries to provide smaller lots and increased dwelling densities in appropriate locations to reduce the imbalance between small and large dwellings relative to the high number of small households in Noosa Shire.**
- 2. Dwelling diversity be facilitated and encouraged through infill development, particularly in terms of the encouragement of smaller dwellings.**
- 3. Provisions be considered in the New Noosa Plan that cater for some of the needs for smaller, more affordable housing options, particularly by students and key workers in the Business Centres of Noosa Junction and the Shire Business Centre.**
- 4. Planning parameters in these key Business Centres be amended to ensure the viability of mixed use development under the scheme.**
- 5. The land uses around all Business Centres be encouraged to develop as hubs with a diversity of small dwelling types.**
- 6. The accommodation needs of the ageing population of Noosa Shire be identified as a priority, and affordable and appropriate aged accommodation, particularly options that allow ageing in place, be facilitated and encouraged.**
- 7. The small dwelling provisions be promoted and incentives widened in some zones, including consideration of the desirability of the granting of parking concessions in Noosa Junction e.g. a parking contribution in lieu of providing parking on-site.**
- 8. The key housing needs of Noosa Shire be identified and publicised as targeted development priorities, specifically:**
 - a. Small multiple dwellings;**
 - b. Secondary dwellings;**
 - c. Small dwelling houses on small lot subdivision;**
 - d. Retirement facilities and residential (aged) care, particularly where co-located;**
 - e. New models for worker and student accommodation;**
 - f. Universally designed or adaptable housing.**
- 9. Minimum densities be considered in key locations to achieve preferred dwelling outcomes.**
- 10. Appropriate incentive options to assist in meeting Council's housing priorities be further investigated and considered, and success in achieving any incentives adopted, monitored**



over time.

- 11. The uptake and acceptability of secondary dwellings to the community and industry be monitored and reviewed over time.**
- 12. The potential for Short Term Rental Accommodation to fill both permanent and tourist accommodation needs be recognised, and their Development Approval not be required. However self-compliance with a Code of Conduct could be encouraged.**
- 13. The remaining 'tourist only' resort site be preserved and the limits of accommodation sustainability in Noosa Shire be recognised while encouraging the growth of the tourism industry in more sustainable ways.**
- 14. The identification of some areas for resident only housing that is not taken up with visitors be considered.**
- 15. The provision of additional crisis and emergency housing in the Shire be advocated and facilitated as far as possible by Council.**

7.1.2 Recommended Actions in Relation to Providing Incentives

Incentives can be an important tool for Councils to attempt to achieve their housing priorities. In 2008 incentives were introduced in the Noosa Planning Scheme in relation to small dwellings. This included a parking relaxation, and less private open space required. It would appear that only one development has taken advantage of the small dwelling unit development provisions. This may suggest that the provisions need further review to be financially successful and, as indicated through the consultation, further awareness and understanding of the provisions within the property industry may be needed. Council might work with designers and industry representatives in reviewing these provisions.

Infrastructure charging discounts have proven elsewhere (e.g. Brisbane) to be an effective incentive to assist in achieving Council priorities (in that case in relation to student accommodation and four and five star hotels prior to G20). BCC has now introduced incentives for the retirement and aged care sector, including expediting the approval process for Retirement and Residential Care Facilities, and lowering some levels of assessment.

Noosa Council has in the past been circumspect in relation to the provision of incentives. Those relating to additional bonus density can be seen as eroding the principles of the Noosa Plan; and like other Councils, those that relate to reductions in infrastructure charges can result in a shortfall in planned infrastructure revenue that it is necessary for Council to fill at some stage unless rating levies or some other technique are used to recoup levies. While the latter may not be particularly significant given the small amount of growth yet to occur, Noosa Shire has a small rate base over which any discount needs to be absorbed.

Reduction in development application fees can similarly affect Council's budgeting while contributing little significant incentive; and development assessment times are already being further reduced under the new Planning Act so that reduction in assessment times for priority applications would be difficult.

On the other hand, it should be acknowledged that the current Noosa Plan is approaching the end of its life and that in preparing the New Noosa Plan, Council may choose to actively prioritise outcomes of social equity and inclusiveness including housing diversity. This report consequently



recommends that appropriate incentives are further investigated as a potential tool for helping to meet the priority needs identified above, where they will retain the intent of the Noosa Plan. These could include:

- Discounts on infrastructure charges;
- A reduction in rates (while this goes to the end users it can be a selling point);
- Providing density, parking or other bonuses subject to impact assessment.

The success of any incentives adopted would nevertheless need to be monitored and reviewed over time, in terms of meeting Council’s objectives for the provision of priority housing, and obviously Council would need to work with the development and property industry to ensure they are aware of the goals. Recommended actions for consideration relating to incentives for specific circumstances are contained within **Section 7.2**.

7.1.3 Recommended Actions in Relation to Housing for Recipients of the National Disability Insurance Scheme

It is apparent that the housing needs of people with disability and a workable system of procuring it, are far from determined under the NDIS.

Added to this is the lack of head of power under Queensland State legislation to require universally designed or adaptable housing, other than by incentives. However, Council could investigate the potential for including the requirement for a proportion of housing to be universally designed or adaptable in the relevant Use Codes for multiple dwellings; or otherwise encourage adaptable dwellings, as has BCC. Council could also consider providing incentives through additional GFA and / or discounted rates and other fees and charges.

BRISBANE CITY COUNCIL - ADAPTABLE DWELLINGS

BCC has included provisions in its Scheme requiring adaptable housing in some situations. It is referenced in the strategic framework, in some use codes, and in some zone codes where ideally located. The Mater Hill precinct of the West End/Woolloongabba district Neighbourhood Plan code contains the following outcomes:

AO17: Development has a minimum of 1 unit on the ground storey of buildings that is designed to be adaptable in accordance with Table 9.3.14.3.D in the Multiple Dwelling code.

PO17: Development for multiple dwellings must be easily adaptable to the needs of people with disabilities.

This appears to have the purpose of supporting hospital uses.

Section of Planning Scheme	References:
<i>Brisbane City Council – Brisbane City Plan 2014</i>	
<i>Strategic Framework</i>	<i>Suburban Living Areas allow for adaptable small-scale multiple dwellings to provide for some intergenerational housing options catering to young people, families and supporting ageing in place.</i>



<p>Major Centre Zone Code</p> <p>District Centre Zone Code</p> <p>Neighbourhood Centre Zone Code</p> <p>Mixed Use Zone Code</p>	<p>Development for a residential use: provides a wide choice in housing sizes and housing adaptability that meet the needs of a diverse population and respond to residents' life-cycle needs;</p>
<p>High Density Residential Zone Code</p>	<p>Purpose: 4(f) Development creates a wide choice in housing form and size, providing housing adaptability to meet the needs of a diverse population and respond to residents' changing life-cycle needs.</p>
<p>Low-Medium Density Residential Zone Code</p>	<p>(6) 2 storey mix zone precinct overall outcomes are:</p> <p>(a) Development comprises low-rise, low-medium density residential buildings:</p> <p>(i) of no more than 2 storeys in height;</p> <p>(ii) located on suitable sites, clustered around identified smaller centres, other destinations or facilities in suburban locations or along identified public transport corridors;</p> <p>(iii) that provide a choice in housing form and size and housing adaptability that meet the needs of a diverse population;</p>
<p>Dwelling House (Small Lot) Code</p>	<p>If for single-storey adaptable housing:</p> <p>PO11</p> <p>Development ensures that housing is able to be readily adapted to a resident's changing life-cycle needs.</p> <p>AO11</p> <p>Development for a dwelling house or secondary dwelling, including associated external areas, is constructed in accordance with Table 9.3.8.3.B.</p>
<p>Multiple Dwelling Code:</p>	<p>Purpose: (2)(m) Development of adaptable housing meets the needs of the community now and into the future.</p> <p>PO18</p> <p>Development meets a diverse range of community needs by providing adaptable housing that is responsive to changing community life-cycle needs.]</p> <p>AO18</p> <p>Where development provides housing, including associated outdoor living areas intended to be adaptable to different persons and households with differing mobility needs, the dwelling units and other site features are constructed in accordance with Table 9.3.14.3.D.</p>

BCC outlines the adaptable housing elements that should be provided and illustrates them with figures. See <http://eplan.brisbane.qld.gov.au/CP/DwellingHseSmallLotCode#Table9383B>



The Summer Foundation (2016) considers that the NDIS provides opportunities to rethink past approaches and to examine new options to support people with significant disabilities to live with greater independence and to have more choice and control over their lives. However they recognise that the housing and disability sectors face a significant challenge in delivering 'suitable' housing. The National Disability Insurance Agency (NDIA) has the potential to play a pivotal role in facilitating innovative sector partnerships, guidelines and policy to deliver the most appropriate housing options for people with disabilities. However, appropriately addressing the housing needs of people with disabilities is also seen by them as the responsibility of the whole community.

The introduction of the NDIS is considered to provide a new environment within which to test and refine innovative housing approaches. The reality is however, that there is currently no single design standard or design framework that the housing sector can presently use to deliver such outcomes.

In summary, it appears too early to predict the full consequences of the NDIS on housing for people with disability. It is noted that QPP 4.0 contains the following definition which would cover individual or group housing under the NDIS. However given the expressed desire of many people with disabilities to live independently in the community, it is likely that many such premises can also be included under the definition of a dwelling house. The provision of single dwellings which are universally designed or adaptable in the general housing stock also need to be encouraged and facilitated.

Column 1 Use	Column 2 Definition	Column 3 Examples include	Column 4 Does not include the following examples
Community residence	Any dwelling used for accommodation for a maximum of six persons who require assistance or support with daily living needs, share communal spaces and who may be unrelated.	Hospice	Dwelling house, dwelling unit, residential care facility, rooming accommodation, short-term accommodation



Recommended Actions for Consideration:

- 16. The range of zones in which a community residence for people with a disability are appropriate, and their assessment level, be maintained.**
- 17. A 'community residence' or community residences as defined under QPP be able to be collocated with Retirement Facilities and Residential Care Facilities.**
- 18. An approach of education and encouragement be adopted to increase the number of adaptable dwellings in Noosa Shire, including:**
 - a. Development and introduction of a policy encouraging a proportion of residential dwellings to contain specified adaptable housing elements, and working with the development / property industry to increase the proportion of new dwellings that are built to the standards identified in the policy.**
 - b. Consideration to providing incentives for dwellings which meet the policy and include a minimum number of universally designed or adaptable dwellings in a multiple dwelling application well located close to shops and services.**
- 19. A lead role networking across local housing providers be adopted by Council to encourage NDIS housing initiatives and proactively support the development of innovative sector partnerships, guidelines and policy to deliver the most appropriate housing options for people with disabilities.**

7.2 Recommended Actions for the Planning Scheme³¹

7.2.1 Recommended Actions in Relation to Small Dwellings

Around 76% of all households in the Noosa Shire were categorised as small households in 2011. The Housing Needs Assessment found that around 72% of small households were residing in large dwellings (with 3+ bedrooms) in 2011 in Noosa Shire. This was similar to the proportion for Fraser Coast (72%), and Queensland (70%), but much higher than for Douglas Shire (55%) and the Gold Coast (64%).

Almost a decade ago Council introduced the concept of 'small dwellings' in the Planning Scheme in order to stimulate the development of smaller dwelling types. Small dwellings are currently permitted in Attached Housing Zones and Business Centre Zones (in the latter, being the only type of Multiple Housing Type 4 permitted).

³¹ Note that where this section uses the existing zone names in Noosa Shire, it is assumed these will be transitioned to new terminology under the Queensland Planning Provisions (QPP). The recommendations should apply to the equivalent zone adopted.



Small Dwellings

Multiple housing (to be known as 'Multiple Dwelling'³², under QPP) means the use of premises for two or more dwelling units or accommodation units as the case may be, occupied by permanent or semi-permanent residents, where the occupants may share common facilities on the site.

Type 4 Conventional Means the use of premises for dwelling units that do not fall within Multiple Housing Types 2, 3, or 5. The use includes units, townhouses, flats, apartments, villas and small dwelling units.

Small dwelling unit means a dwelling unit containing no more than 2 bedrooms, no study, media room or other rooms capable of being used as a bedroom, and has no more than 90m² of gross floor area.

Multiple Housing Type 4 is always consistent in the Attached Housing Zone.

In Business Centre Zones, however, Multiple Housing Type 4 Conventional is ONLY consistent where small dwelling units and part of a mixed use development.

Small dwellings require less carparking and less private open space (a balcony not less than 1.5m depth and with a minimum area of 4m² as opposed to a minimum area of 12m², with minimum dimensions of 2.5m)

Despite the fact that concessions in relation to parking and private open space were made available for small dwellings, the uptake has been very limited. It appears that the principal reasons for this are severalfold:

- There has been limited uptake of any unit development in available Attached Housing zones;
- Given the size of properties it is financially and practically unviable with the current planning parameters in Business Centre Zones to undertake redevelopment which might include small dwellings or 'shop top housing';
- The cost of the land, especially if a house needs to be demolished, appears to demand larger, more expensive dwelling units;
- There appears a distinct lack of awareness of the provision for small dwellings among developers and real estate agents.

Recommended actions which could be considered to increase the uptake of the small dwelling provisions and to increase densities on appropriate sites, include the following.

Recommended Actions for Consideration:

20. The need for small dwellings and the opportunities and benefits for providing them under the small dwelling provisions of the Planning Scheme be publicised through a Fact Sheet released for industry, and accompanying publicity.
21. Review of the parameters for development in key (Business Centre) Zones which would be suitable for small dwelling residential accommodation be undertaken, and it be ensured that

³² Multiple Dwelling will be defined as Premises containing three or more dwellings for separate households, e.g. apartments, flats, units, townhouses, row housing, triplex, but excluding rooming accommodation, dual occupancy, duplex, granny flat, residential care facility, retirement facility



provisions such as GFA and on-site parking provisions are adequate to make redevelopment commercially viable.

22. The owners / developers of key properties in and close to Business Centres (such as the former Bowls Club in Noosa Junction) be worked with to achieve quality outcomes that deliver small dwellings.

7.2.2 Recommended Actions in Relation to Dwelling Diversity

Dwelling diversity would be increased by recommendations relating to small dwellings, as well as several other types of dwellings in this section. However opportunities might also be considered for identifying and overcoming any barriers to increasing diversity on any remaining vacant land, which will largely be infill development. The consultation made various recommendations in this regard.

It is apparent that land is one of Noosa Shire's most precious resources. Particularly among developers, land was the most sought after commodity which could not be provided. It is clearly important that the maximum use is made of remaining available undeveloped land. To reduce the imbalance between small and large dwellings relative to the high number of small households on remaining vacant suitably located land in the urban area of Noosa Shire is recommended to be a high priority. One way which Council could consider doing this is to introduce a minimum density on particular sites. This means that the site will only be developed to deliver the density sought or stay as is, with no loss to the owner and possibly an uplift in values. Locations where minimum density is used would need to be carefully selected.

In terms of infill development, the land uses around business centres will desirably continue to be encouraged to develop as hubs with a diversity of small dwelling types. Vacant or underutilised land around Noosa Junction, Cooroy and Tewantin with good access to transport and services might be considered to provide further attached housing opportunities for permanent residents, especially older people in the latter two cases. It may also be possible to identify areas around the Noosa Village which are now ageing as detached housing areas and could be intensified in use. Opportunities for duplexes which can be strata titled (unlike secondary dwellings) might be broadly considered in Tewantin and Cooroy, close to town or neighbourhood centres.

Consideration might also be given to areas at the edges of the urban footprint as to whether any unconstrained areas might be intensified, especially any areas in close proximity to activity centres.

Recommended Actions for Consideration:

23. Zoning be reviewed on all unconstrained, undeveloped urban land, and wherever desirable in regard to its location relative to transport and services, and without reducing the amenity of neighbouring areas, its appropriateness considered for Multiple Dwellings of a suitable type or for dwelling houses on small lots (nominally 450m²).
24. In tandem with the above, the potential to limit dwelling housing size on small lots potentially through a Dwelling House (Small Lot) Code be investigated.
25. Minimum densities be considered on particular sites.



26. Additional opportunities be investigated, including those identified through consultation for infill development, to satisfy the projected dwelling diversity needs identified in this study, in particular:
 - a. An increase in Dual Occupancies (duplexes) in existing detached housing neighborhoods such as areas of Tewartin, Cooroy, Noosaville and Noosa Heads.
 - b. An increase in Multiple Dwellings within and immediately surrounding Business Centres at Noosa Junction, Tewartin, Cooroy and the Shire Business Centre.
 - c. An increase in dwelling houses on small lots in underdeveloped parts of Noosaville, Tewartin and Cooroy.
27. Levels of assessment be reviewed (in line with the recommendation of the *SPP Housing Supply and Diversity*) to minimise regulation and encourage the delivery of desired housing options.
28. The potential for creation of walkable mixed use neighbourhoods (where a broad range of services are within a 400m radius) be considered through local area planning initiatives (informed by the *Next Generation Planning Guide*³³), to assist in stimulating development around Business Centres such as Tewartin where intensification has been slow to proceed.
29. The approach of the current Planning Scheme provisions which encourage the development of large duplexes rather than other smaller types of Multiple Dwellings be reconsidered.
30. Other provisions be reviewed which may be seen as unduly restricting site potential.
31. Appropriate incentives be considered for two storey Dual Occupancy or Multiple Dwelling developments, i.e. duplexes or townhouses, which include a bedroom and bathroom on the ground floor with an accessible path of travel.
32. Any additional opportunities for greenfield land be reviewed.

7.2.3 Recommended Actions in Relation to Residential Development in Business Centres

Noosa Junction and the Noosa Shire Business centre provide opportunities for well located residential development. In the case of the Shire Business Centre, in particular, the opportunities for building an Activity Centre which includes residential development for key workers, older people and small low-income households warrants further investigation as potentially the key hub of the Shire. It would also support business uses on the site.

The Scheme currently permits small dwellings in two employment zones of the Shire Business Centre if ancillary and subordinate to community or business uses. It is suggested that increased residential development above that permitted may be desirable and likely to find a ready market in a location that will provide employment, transport, services, education facilities, and retail and commercial uses. The small dwelling units recently constructed in the only designated residential precinct of the Shire Business Centre sold very quickly.

In the last decade Noosa Junction has struggled as a retail centre and/or business centre and current planning provisions, including limitations on height and GFA and the rate of required

³³ Council of Mayors SEQ, 2011



onsite carparking, do not allow for usable, financially viable mixed use developments. As a consequence, redevelopment has not eventuated. While creative arts, markets, concerts etc may assist the Junction, only significant redevelopment of the centre would revitalise and reinvent the business centre.

Planning parameters need to be considered which would make mixed use redevelopment to three, or if necessary four storeys, viable. Only in this way would a significant amount of residential development be provided other than possibly the odd 'shop-top' dwelling. The residential development achieved could provide vital accommodation for key workers in a transport hub with ready access to Hastings Street and other hospitality areas of the Shire. It could also provide much needed student accommodation which may further stimulate the growth of this industry within Noosa. Some could also be used for affordable tourist accommodation. Redevelopment of the previous bowls club and surrounds offers a possible opportunity to incorporate such development.

It is suggested that professional expertise in urban design and revitalisation in conjunction with property development advisory services might be sought to identify planning parameters and desired design outcomes for Noosa Junction Business Centre which would result in the viability of the type of redevelopment envisaged.

Recommended Actions for Consideration :

33. Parking requirements be reviewed for small dwellings in mixed use developments in well serviced activity centres with a view to their relaxation/reduction and incorporation of alternatives such as scooter and bicycle parking.
34. As part of the above the re-introduction of payments in lieu of on-site parking requirements in activity centres be considered where public offstreet carparks can be increased in capacity and used by shoppers/workers during the day and residents at night.
35. Local property investors and the design community be consulted to specifically seek urban design and revitalisation expertise with the aim of identifying suitable planning parameters for Noosa Junction Business Centre which would result in the viability of mixed use redevelopment. The acceptability of the resultant design parameters would be subject to public consultation during the plan preparation process.
36. Planning provisions in Noosa Junction be reviewed to facilitate the provision of innovative models (such as the Nightingale model, see Section 6.5.3) of mixed use developments which will allow the provision of 'rooming accommodation' for groups such as students and transient workers.
37. Zoning in the Shire Business Centre Zone be reviewed in liaison with the site owner to incorporate increased potential for including small dwelling residential development.

7.2.4 Recommended Actions in Relation to Secondary Dwellings

The Housing Needs Assessment identifies that secondary dwellings have the potential to address a large part of the housing needs in Noosa Shire for smaller and affordable dwellings. The 2006 Planning Scheme included provisions for a relative or employee apartment which initially required planning approval, but through Planning Scheme amendments this requirement has been dropped. To date a relatively small take up of secondary dwellings has occurred (approximately



30 over the last 2.5 years). The Planning Scheme amendments that no longer require a secondary dwelling to be occupied by a relative or employee may increase their attractiveness and their rate of uptake. However factors that may decrease their attractiveness could be:

- The secondary dwelling must be physically attached to the main house in a Residential Zone (this limits the ability to provide fire separation and therefore affects the classification of the building and potentially house insurance);
- An infrastructure charge will be levied on the secondary dwelling;
- The secondary dwelling cannot be strata titled.

Given the limited undeveloped land available in Noosa Shire, it appears important that secondary dwellings play the role that is envisaged of them, while preserving the amenity of existing neighbours. Given the difficulties in relation to the first factor, it may be appropriate for this to be reviewed.

While requirements vary somewhat amongst Councils in general a secondary dwelling will be self-assessable under circumstances such as:

- It meets a maximum GFA (which varies between 45m² and 100m² dependent on Local Governments and zones).
- There may be a minimum lot size applicable (such as 600m² in Sunshine Coast).
- There may be a maximum separation from the main dwelling (such as 20m in Brisbane city or 10m on the Gold Coast).
- A maximum site cover for combined dwellings will apply (typically 50%).
- The secondary dwelling cannot be subdivided or community titled at a later date.

Some Local Governments insist that for self-assessment both households maintain a relationship or association such as the sharing of utility bills. Few require physical connection of the secondary dwelling to the main house and fire separation is optional.

It would appear appropriate that monitoring be undertaken of the uptake of secondary dwellings under the amendments, and also any issues that are raised by neighbours or applicants are recommended to be recorded and used for review of the provisions in an appropriate timeframe.

Recommended Actions for Consideration:

38. A fact sheet be prepared and the amendments to secondary dwellings be publicised to make people aware of this option for providing smaller accommodation.
39. The provision that the secondary dwelling must be physically attached to the main house in a Residential Zone be reviewed.
40. The uptake of secondary dwellings be monitored over a suitable timeframe.
41. Any issues raised by neighbours or applicants during this timeframe be recorded and collated.
42. A review be undertaken of the provisions at the completion of the timeframe, informed by the information collected and in consultation with the building and design industry.



7.2.5 Recommended Actions in Relation to Housing Affordability

One of the most important issues facing SEQ as a whole is the provision of diverse and more affordable housing. The recommendations above in relation to smaller dwellings, secondary dwellings and diversity of dwellings, including those for key workers and students, should assist in providing generally more affordable dwellings on the private market relative to other types of dwellings. It is anticipated in particular, that secondary dwellings, if they are implemented by the market, will provide a much needed source of affordable rental accommodation for small households. This is the manner in which affordability appears to have been considered in a range of schemes (see box below).

PROMOTING AFFORDABILITY IN PLANNING SCHEMES

Affordability measures adopted in other recent Planning Schemes have focused on diversity, lot size and small, innovative dwelling types. They also emphasise the core concepts of the Queensland Government (2016c) of:

- *Utilisation of levels of assessment and development standards to encourage, rather than impede the delivery of required housing options (including making dwelling houses exempt from assessment against the Planning scheme) (assessed only against building provisions); and*
- *Promotion of housing options, and particularly the encouragement of higher densities, in well-serviced locations with access to facilities and services (depending on the local context, transport, education and health services, employment, community services and leisure/lifestyle opportunities).*

The following initiatives were identified in factsheets accompanying the various draft planning schemes/new planning schemes. Some of these factsheets were prepared to describe changes in draft planning schemes being displayed for public input and therefore these changes may have been changed/may change in the final version.

Section of Planning Scheme /Theme	Reference
Brisbane City Council – Brisbane City Plan 2014	
<i>Low-medium density residential zone (around 10% of residential zones) generally in the inner city and in suburbs close to centres and transport</i>	<ul style="list-style-type: none"> • <i>Proposes to allow minimum lot sizes of 180m² in the low-medium density residential zone (LMR), subject to site configuration requirements and a development approval.</i> • <i>Proposes that the plan be more specific about where small lots can be located, their sizes and how they fit in with their surrounding area.</i> • <i>Houses can be 'terrace' style with shared side walls. However, where adjoining an existing house they will need to be a minimum of 1.5 m from the side boundary. Minimum width of these lots will be 6-7.5 m.</i>
<i>Low density residential zone (majority of suburban areas)</i>	<ul style="list-style-type: none"> • <i>Proposes minimum lot size reduction to 300m² with a 7.5 m minimum frontage, only where the lot is within 200m walking distance of shopping centre or commercial centre.</i>
<i>Secondary dwellings</i>	<ul style="list-style-type: none"> • <i>Allows greater maximum size of secondary dwelling in low density residential zone from 70 to 80m². A development application would be required if the dwelling is proposed to be subdivided or if it is to be leased to a non-family member.</i>



Bundaberg Regional Council – Bundaberg Regional Council Planning Scheme 2015

<p><i>Low density residential zone</i></p>	<ul style="list-style-type: none"> • Reduction in 'red tape' for dual occupancy and secondary dwelling development to assist with housing affordability and allow older people to remain in their neighbourhoods. In most cases under the planning scheme, dual occupancies are self assessable against the Dual Occupancy Code. This is a significant change from the previous (4) planning schemes where dual occupancy varied from code assessment to impact assessment across the region. Secondary dwellings are exempt development in low, medium and high density residential zones.
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<p><i>Medium density residential and high density residential zones</i></p>	<ul style="list-style-type: none"> • Identifies areas where infill development is supported, generally within easy walking distance to the Bundaberg CBD and other facilities and services.
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Redland City Council - City Plan 2015

<p><i>Diverse housing types in new development</i></p>	<ul style="list-style-type: none"> • In newly developed communities a mix of lot sizes and housing forms will be encouraged.
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Mackay Regional Council – Mackay City Planning Scheme

<p><i>Higher density development at strategic locations</i></p>	<ul style="list-style-type: none"> • Proposes the use of the medium density residential zone in strategic locations – in close proximity to centres and employment nodes, public transport corridors and high amenity elements (parkland/coastline).
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<p><i>Average densities in new neighbourhoods</i></p>	<ul style="list-style-type: none"> • Proposes minimum density requirements in the medium and high density residential zones.
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<p><i>Mix of lot sizes and housing types in new neighbourhoods</i></p>	<ul style="list-style-type: none"> • Requires a mix of lot sizes and types to support housing diversity. The number of lot types and therefore the number of small and multiple dwelling lots increases with the number of lots to be subdivided.
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Whereas in some other States (see boxes below) a State Government level head of power is provided for Local Government to charge or require affordable housing, this opportunity does not currently exist in Queensland.

SOUTH AUSTRALIA

The provision of 15% affordable housing is a South Australian Government requirement for all new significant developments. Significant developments include government land, major developments and private developments that are bound by development plan policy for Affordable Housing. The provision of affordable housing is encouraged outside of significant developments through various incentives.

Development applications submitted for assessment that include affordable housing are referred to Renewal SA for advice on whether the affordable housing criteria have been met.

Criteria for affordable housing are published in the Government Gazette and are reviewed annually. A



dwelling is considered to be an affordable home if:

- *it is offered for sale at or below the appropriate price;*
- *it is offered for sale to eligible buyers; and*
- *the development is subject to a legally binding agreement to ensure these requirements are met.*

More information is available at <https://www.sa.gov.au/topics/property-and-land/land-and-property-development/planning-professionals/developer-responsibilities-for-affordable-housing>

NSW

In NSW, as a result of a court case, the Department of Urban Affairs and Planning (now 'Department of Planning') created State Environmental Planning Policy No 70 (Affordable Housing Revised Schemes) to support Local Government in requiring a proportion of affordable housing in developments. This SEPP allows Councils with affordable housing provisions within their environmental planning instruments and plans to continue affordable housing provisions.

As a result, Clause 25B of the Willoughby Local Environmental Plan 1995 includes provision for Local Housing Precincts where affordable housing is to be provided. Clause 25B applies to precincts selected by Council. The mechanism states that a four percent contribution to affordable housing out of the entire development must be made by the applicant carrying out development within one of the precincts. The applicant can contribute in two ways – a monetary contribution equalling a four percent levy on the total cost of development, or via dwelling contribution equalling four percent of the total number of dwellings the development creates. These dwellings are rented at a cap rate for 10 years at 30 percent of the tenant's weekly income.

It has however been noted that Noosa Shire operates in an unusual context. It is a highly desirable coastal location in a unique environmental setting where market conditions have favoured the affluent and the development of large, high standard dwellings compared to many other coastal settlements. Maintaining good planning standards, combined with a defined population/ development capacity, has led to relatively high priced real estate, and the situation where for some groups in the community, housing is unaffordable.

This situation is likely to only be exacerbated over time as land stocks decrease and the development capacity is approached. Hence regardless of measures undertaken to increase affordability, there can be no guarantee that new small dwellings on the private market will actually be 'affordable' by low income households relative to other areas, nor occupied by existing Noosa Shire residents who require them to remain in the area (such as key workers) rather than attracting new residents. What can be anticipated is that such dwellings will be **more** affordable than much of the existing housing stock of Noosa Shire.

There will continue to be households who cannot compete on the private dwelling market, and will require assistance either temporary or longer term. It was recognised in the Queensland Government Discussion Paper, *Working Together for Better Housing and Sustainable Communities* (2016d), that there is a growing shortage of affordable housing for rent and purchase in many markets across the State, and the housing system overall is struggling to respond to people's changing needs. It was found that Noosa Shire was much less affordable than comparative LGA's, Brisbane and the State in terms of its level of either rental or purchase housing affordability.



Yet the supply of social housing appears relatively low, the supply of community housing is very low, and the supply of emergency accommodation is even poorer. There was a total of only 16 NRAS dwellings built in Noosa Shire, and there are no further application rounds planned for NRAS. It would appear unlikely that there will be a further State or Australian Government response to provide more low cost housing in the near future.

The provision of social housing is the responsibility of the Queensland Government. Social housing comprises public housing and community housing. Public housing is funded and managed by the State Government; and community housing is funded by either the Australian or the State Government and managed by the not-for-profit sector. However by 2020, most social housing services will be managed by community housing providers.

In recent years there have been a small number of larger, commercially sophisticated not-for-profit providers operating alongside the existing State and Territory-run housing authorities to provide 'affordable housing developments'. Organisations such as 'housing companies' utilise financial measures such as working with banks, developers and other commercial partners to leverage finance and construct more dwellings than they would have been able to do through government grants alone.

Noosa Shire is fortunate to have an active housing company, although the dwellings able to be provided in Noosa are significantly fewer than in less expensive areas across the north coast region they serve. The cost of land in Noosa Shire continues to be a barrier. Charitable organisations have also expressed hesitation to locate people on a temporary basis in supported accommodation in Noosa Shire given that they are unlikely to be able to provide affordable exit options for them to transition into permanent accommodation.

It will be important that Council continues to support housing providers in lobbying other levels of government for the provision of supported and emergency accommodation, and government land for the provision of such accommodation.

Council can presently influence the provision of low cost housing on the private market in Queensland only through the provision of incentives. The success of these initiatives in Queensland has yet to be proven, and may be more difficult to achieve in Noosa Shire because of land price. However it is possible that a small increase in dwellings able to be owned by or head-leased to a charitable organisation or housing company may occur should such provisions be included in the New Noosa Plan.

It may also be possible for Council to support the activities of the housing company and other providers in delivering community housing and affordable rental accommodation. It is understood that other ways of promoting the supply of more affordable housing will be investigated as part of the implementation of the *Social Strategy 2015*.

Council already reduces development application fees and infrastructure charges for not-for-profit organisations such as community housing.

Recommended Actions for Consideration:

43. The importance of housing providers be recognised in meeting future affordable housing needs in Noosa Shire and strategic partnerships be formed which may promote their objectives.
44. Appropriate incentives be considered for development applications which include a minimum



number of affordable dwellings (as defined by QPP) to be head-leased or owned by a registered social housing provider.

45. The suitability of new affordable housing models summarised in Section 6.5.3 and their appropriateness to contribute to Affordable Living be considered.

7.2.6 Recommended Actions in Relation to Short Term Rental Accommodation

It is accepted that there are many social and economic reasons that Short Term Rental Accommodation is required in Noosa Shire, both for visitor and resident accommodation, and that there are many beneficial impacts of utilising otherwise unused accommodation.

Without the availability of this accommodation, the identified shortage of small and affordable accommodation, especially in the rental market, would be significantly greater. Some people would also be required to place larger homes onto the market and enter the market for smaller accommodation (rental or purchase) themselves.

Council advises that in the majority of cases short term rentals have not caused problems, including student home stays, although some issues of overcrowding have occurred. In particular areas where significant numbers of whole dwellings may be rented out, such as Sunshine Beach and Noosa Sound, issues of noise and car parking have been raised. This is exacerbated where large proportions of the neighbourhood are holiday rentals and there is a reduced sense of community. So called 'party houses' have also raised issues in relation to residential amenity although these are the exception rather than the norm. Some issues are known to arise within strata titled complexes where a mix of holiday lettings and permanent residents occurs. A Body Corporate in Queensland has no power to adopt a by-law preventing short-term letting in residential lots.

It is clear that short term rental housing will increasingly be provided and sought by both permanent residents and visitors. For this reason, it is not recommended that Council make Short Term Rental Accommodation subject to Development Approval. However several real estate agents expressed the view in consultation that adequate controls for the practice needed to be introduced. It would appear that the most effective regulation is at the State level. Queensland does not appear to have adopted a position on the issue, and the use under QPP appears essentially undefined. Other States and various Councils across Australia have had mixed reactions to the issue, some clarifying that Short Term Rental Accommodation is legal; others threatening fines and calling for applications for changes of use to be made, especially where a whole house is to be rented out. For information, responses by BCC which could be considered by Council are summarised below (see boxes).

BRISBANE CITY COUNCIL – SHORT TERM ACCOMMODATION

It is the view of BCC that the short-term rental of an entire dwelling house or unit by the property owner is unlikely to be a subsidiary to the residential use of the property. This would likely constitute a 'short-term accommodation' and require development approval from Council.

In this context, City Plan defines 'short-term' as typically a stay of less than three consecutive months. The development application is assessed by Council against Section 9.3.22 Short-term accommodation code in



City Plan.

Short-term accommodation is primarily supported in centre zones or located near tourist, cultural or shopping and leisure facilities. There are no public notification requirements for the application process for sites in centre zones, higher density residential areas and in some low-medium density areas located on arterial or suburban roads.

City Plan primarily ensures that adjoining residents or businesses are not significantly impacted by the use. If a residential lease is for a longer period (over three consecutive months) the use is defined as a dwelling house, dual occupancy or a multiple dwelling, depending on the number of separate households on the premises. If the residential use involves individual rooms leased separately to different people it is defined as rooming accommodation.

BRISBANE CITY COUNCIL – ROOMING ACCOMMODATION

Definition

Brisbane City Plan 2014 defines rooming accommodation as a use of premises for the accommodation of one or more households where each resident:

- has a right to occupy one or more rooms;
- does not have a right to occupy the whole of the premises in which the rooms are situated;
- may be provided with separate facilities for private use;
- may share communal facilities or communal space with one or more of the other residents.

Rooming accommodation may include:

- rooms not in the same building on site;
- provision of a food or other service;
- on-site management or staff and associated accommodation.

Examples of rooming accommodation include a boarding house, monastery, hostel and off-site student accommodation.

It does not include a hospice, community residence, dwelling house, short-term accommodation or multiple dwelling.

A house rented under a rooming accommodation agreement

A house leased by several people each under a rooming accommodation agreement is considered several discrete households under the Queensland Planning Provisions and the Residential Tenancies and Rooming Accommodation Act 2008.

Under City Plan, a dwelling house is a premises that is occupied by one household. A house occupied by tenants under a rooming accommodation agreement cannot be defined as a dwelling house under City Plan.

The building classification of a premises rented under a rooming accommodation agreement will be required to be upgraded under the National Construction Code to a Class 1b structure. Additionally, City Plan has similar requirements.

Preferred locations

City Plan enables rooming accommodation for a maximum of five occupants in the Low density and



Character residential zones. Building in these zones must have the appearance of a dwelling house being used for domestic purposes. In particular, the number of occupants, vehicle parking, refuse and the location must minimise the amenity impacts on neighbours and the surrounding area.

Rooming accommodation may be self-assessable where:

- *located in the appropriate zone*
- *accommodating five persons or fewer*
- *complying with all self-assessable outcomes of the Rooming accommodation code in Brisbane City Plan 2014.*

Rooming accommodation provided to individuals who are not students may need to be registered and accredited as a service provider under the Residential Services (Accreditation) Act 2002.

BRISBANE CITY COUNCIL – STUDENT HOMESTAY ACCOMMODATION

Brisbane City Council has a register that lists off-site student rooming accommodation properties. The purpose of the register is to become aware of all known student rooming accommodation premises and to be able to resolve minor compliance and nuisance issues. To register, property owners need to nominate a person who is responsible for the day-to-day maintenance and operation of the property. Property owners may nominate themselves or any other person, such as a property manager.

If providing rooming accommodation in an existing house in a residential area, it may need to be assessed or approved by a private building certifier for compliance with the relevant building codes. If this is the case, Council would still like registration to occur, provided the property owner is willing and committed to obtaining the relevant approvals in a reasonable timeframe. By registering, Council will provide support while the owner arranges for this to be carried out. Registration is only provided to the owner of the property.

Recommended Action for Considerations:

46. The existing Planning Scheme approach to Visitor Accommodation Type 1 Home Hosted in detached dwellings be retained, which permits no more than 6 guests accommodated in no more than three rooms, where the host resides on site.
47. Areas for permanent residents be protected where short term accommodation³⁴ such as resorts, serviced apartments, backpackers, motels and hotels is not consistent.
48. The HRIA be worked with by Council to refine and implement an effective regulatory proposal for Short Term Rental Accommodation in Noosa Shire.
49. A Fact Sheet on Short Term Rental Accommodation be prepared and publicised which includes a set of criteria that should be met by providers, including compliance with the HRIA Code of Conduct.

³⁴ As defined under QPP and appearing to exclude Short Term Rental Accommodation through AirBnB etc



7.2.7 Recommended Actions in Relation to Tourist Accommodation

Should growth in the tourist market continue as it has been on average over the last decade, there would be ongoing demand for visitor and tourist accommodation of all types. Some of this demand may be filled by increasing existing occupancy rates, some may be filled by secondary dwellings, especially in the hinterland, some is likely to be filled by retrieving resort units lost to permanent residents and some may be filled by further use of the residential stock.

The remaining resort site at Settler's Cove will provide a significant increase in capacity, and it is important for this reason that it is preserved for this purpose. However overall, the stock which can be used for either residential or tourist accommodation is finite, and the direction of Tourism Noosa to increase the yield of the existing industry sits well with that proposition, as continuous ongoing growth in visitor accommodation throughout the projection period does not appear sustainable.

Recommended Actions for Consideration:

50. The 'tourist only' resort site at Settler's Cove be preserved and protected, as well as those already developed.
51. The limits of tourist accommodation sustainability be recognised and Tourism Noosa be encouraged to work within the confines of these limits to grow the tourism industry in Noosa Shire, so as to protect an appropriate balance of housing for permanent residents.

7.2.8 Recommended Actions in Relation to Aged Accommodation

The benchmarking process found that while there appears to be a surplus of residential aged care places for the Sunshine Coast aged care region, there appears to be a shortfall of places in Noosa Shire. Home care is not able to be benchmarked at a Shire wide geographic scale. However the number of home care places at the Sunshine Coast aged care planning region level is below the targets established by the Australian Government and therefore additional services in the local area may also be beneficial to the local population. Similarly, the number of retirement facilities may not be adequate into the future, particularly if any of the proposed facilities do not eventuate.

The relatively few retirement village facilities in Noosa Shire (especially in coastal areas), together with an apparent underprovision of aged care places and home care packages³⁵, and a lack of smaller, more affordable dwellings and high levels of housing stress, belies the needs of the current and future aged population of Noosa Shire. The choices are to move away to other areas of the Sunshine Coast region to access residential services in potentially cheaper accommodation, to return interstate if that was their origin, or to move into residential aged care prematurely. Those renting are particularly vulnerable.

Retirement villages and residential care facilities are part (and an important part) of the package of solutions but also important is the ability for people to age in place within their existing town/community through improved housing choice and flexibility. In this regard, the secondary

³⁵ As far as can be ascertained benchmarking at the Shire-wide level



dwelling amendments and an increase in the establishment of small unit or semi detached complexes not necessarily specifically for the aged, should contribute significantly.

To encourage retirement villages and aged care facilities in Brisbane, BCC has introduced incentives to shorten the development approval process, provide some certainty on approval times and make aged care applications a priority in Council (see box).

BRISBANE CITY COUNCIL - RETIREMENT LIVING AND AGED CARE ACCOMMODATION INCENTIVES

In September 2016, Brisbane City Council announced incentives to support the delivery of accommodation suitable for the city's ageing population. There were four components of the plan:

- *An infrastructure charge discount of 33% for development approvals between September 2016 and 31 December 2019 for new retirement living or residential aged care developments in the Brisbane LGA.*
- *Improvements to development assessment processes, including free pre-lodgement advice, dedicated assessment managers for new retirement and aged care housing, and a decision within 90 business days.*
- *Greater consideration for accommodation suitable for older people when drafting neighbourhood plans.*
- *Amendments to City Plan 2014 (currently in draft amendments and expected to come into effect in 2017) that offer a more streamlined approvals process – including:*
 - *Updating the strategic framework of City Plan 2014 to acknowledge well-located retirement facilities and aged care facilities are envisaged in Suburban Living Areas, and recognise that small-scale commercial, retail and community uses suitable for integration with retirement accommodation are encouraged.*
 - *Creating a retirement facility and aged care facility code with specific provisions tailored to these facilities.*
 - *Lowering the level of assessment to code assessment for refurbishment of existing facilities, reuse of existing sites and in a broadened range of zones.*
 - *Increasing allowable building heights by two storeys as code assessable development in the medium and high density residential zones.*
 - *Making code assessable, small-scale commercial, retail and community uses in retirement facilities and aged care facility developments.*
 - *Identifying opportunities for facilities on privately owned sport and recreation zoned land.*
 - *Make self assessable, transitioning an existing building from retirement facility to aged care facility or vice versa.*

It is untested whether these incentives will increase the supply of aged accommodation in Brisbane, or indeed whether they would increase the supply in Noosa Shire given the shortage of land for such facilities. However it is clear that given the shortage of land for new retirement or aged care facilities in Noosa, there may indeed be a need to simplify and facilitate the redevelopment of existing facilities.

Likewise, changes in models of institutional care are also such that increasingly, the inclusion of other types of uses on retirement village sites (to keep older people 'in their community') may be demanded, and the definitions between types of care will undoubtedly be broken down over time.

Flexibility of uses which can be included on retirement village or aged care sites appears consequently desirable and may facilitate the development of new models.



The general recommended actions in relation to well located smaller dwellings and more affordable housing also clearly apply to helping to meet the needs of older people.

Recommended Actions for Consideration:

51. Existing suitable locations identified for potential Retirement and Residential Care Facilities be preserved.
52. The level of assessment required for modifications and minor additions to existing retirement and aged care facilities be as low as deemed appropriate (e.g. in BCC these are code assessable).
53. Small-scale commercial, retail and community uses in Retirement Facilities or Residential Care Facilities be included as consistent uses (e.g. in BCC these are code assessable).
54. The zones within which aged accommodation facilities are permitted be reviewed and broadened if considered feasible to increase the options for finding sites for Retirement Facilities or Residential Care Facilities.
55. Planning scheme provisions be considered which could provide opportunities for ageing in place such as the dividing of a detached house into two or more separate dwelling units or bedsits (depending on the location and site area) subject to compliance with building codes and fire regulations.
56. Provisions for group houses or co-housing models that provide adequate independence as well as security for residents be retained and reviewed.
57. Partnerships be considered with not-for-profit organisations to foster networks of people willing to share accommodation and potentially reduce existing barriers or fears in so doing.



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APPENDICES

Appendix A. Comparative Analysis

Comparative Indicators of Housing Choice, Affordability and Stress, Noosa Shire, Fraser Coast, Douglas Shire, Gold Coast and Queensland, various years

Indicator	Comparative Indicator				
	Noosa Shire	Fraser Coast	Douglas Shire	Gold Coast	Queensland
Baseline Indicators					
Size of population estimate 2015 (a)	53,515	101,977	11,661	555,608	4,778,854
Growth rate 2005-2010 (a)	1.3%	3.1%	1.5%	3.0%	2.4%
Growth rate 2010-2015 (a)	1.1%	1.1%	0.9%	1.9%	1.6%
Proportion of people over 60 at 2015 (a)	30.2%	31.6%	22.2%	21.1%	19.7%
Proportion of people over 60 at 2036 (b)	37.6%	39.4%	31.0%	25.6%	25.4%
Median household income, 2011 ©	\$963	\$780	\$993	\$1,174	\$1,235
Median individual income, 2011 ©	\$509	\$396	\$586	\$571	\$587
Proportion of Population in SEIFA IRSD Most Disadvantaged Quintile of Neighbourhoods, Qld, 2011 (d)	12.8%	60.7%	16.9%	11.8%	20.0%
Proportion of Population in SEIFA IRSD Most Disadvantaged 40% of Neighbourhoods, Qld, 2011 (d)	41.1%	84.7%	54.5%	31.8%	40%
Proportion couple families without children, 2011 (e)	34.0%	34.7%	30.7%	28.7%	28.6%
Proportion lone person households, 2011 (e)	24.4%	25.0%	28.7%	23.0%	22.8%
Proportion single parent families, 2011 (e)	11.5%	12.4%	9.4%	12.1%	11.6%
Housing Indicators					
Proportion of Dwellings, 2011 (f)					
<ul style="list-style-type: none"> Separate houses 	80.0%	87.5%	71.0%	60.4%	78.5%
<ul style="list-style-type: none"> Semi-detached dwellings 	9.9%	3.0%	11.4%	18.8%	8.4%



Indicator	Comparative Indicator				
	Noosa Shire	Fraser Coast	Douglas Shire	Gold Coast	Queensland
• Attached dwellings	8.7%	7.2%	13.6%	19.6%	11.7%
• Other dwelling types	1.3%	2.3%	3.6%	1.1%	1.3%
• Not stated	0.1%	0.1%	0.3%	0.1%	0.1%
Proportion unoccupied private dwellings, 2011 (g)	17.9%	12.3%	14.9%	11.4%	9.7%
Proportion of households renting, 2011 (e)	28.9%	29.5%	39.8%	35.8%	33.2%
Proportion of households owning dwellings outright, 2011 (e)	36.2%	38.9%	27.7%	26.3%	29.0%
Rental vacancy rate, average 12 months to March 2016 (h)	1.3%	3.3%	Cairns: 2.5%	1.7%	NA
Housing Choice/Suitability					
Proportion of Small Households in Small Dwellings, 2011 (f)	27.8%	28.2%	45.3%	36.0%	29.6%
Proportion of Small Households in Large Dwellings, 2011 (f)	72.2%	71.8%	54.7%	64.0%	70.4%
Proportion of Large Households in Large Dwellings, 2011 (f)	94.6%	95.5%	87.1%	94.6%	95.4%
Housing Stress					
Proportion of low income households in rental stress, 2011 (i)	34.5%	37.8%	24.3%	31.9%	25.3%
Proportion of low income households in mortgage stress, 2011 (i)	15.8%	15.2%	16.9%	13.0%	9.8%
Proportion of <u>total</u> households in housing stress, 2011 (i)	15.6%	15.7%	15.9%	16.2%	12.0%
Housing Affordability					
Affordability Gap Analysis, 2015/16 (j)					



Indicator	Comparative Indicator				
	Noosa Shire	Fraser Coast	Douglas Shire	Gold Coast	Queensland
Proportion Median Income Household Spends to Rent Median 2 Bed Unit, average 12 months to June 2016 (h)	34.6%	27.7%	26.0%	29.1%	NA
Proportion Median Income Household Spends to Rent Median 3 Bed House, average 12 months to June 2016	40.7%	32.8%	30.9%	34.2%	NA
Proportion Median Income Household Spends to Pay Mortgage Repayments on Median Unit, average 12 months to Dec 2015	37.1%	26.1%	18.2%	25.9%	25.1%
Proportion Median Income Household Spends to Pay Mortgage Repayments on Median House, average 12 months to Dec 2015	48.7%	32.9%	33.4%	40.0%	30.4%

Notes:

- a. Queensland Government 2016b;
- b. Queensland Government 2016h;
- c. Queensland Government 2016e; Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.
- d. Queensland Government 2016f; SEIFA IRSD is Socio-Economic Indexes for Areas Index of Relative Socio-Economic Disadvantage. Neighbourhoods in Queensland are scored and ranked based on a range of socio-economic indicators. The areas are then broken into five groups or quintiles.
- e. ABS 2013a; Excludes unoccupied dwellings, and visitors only and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.
- f. ABS 2013a; Excludes unoccupied dwellings, and visitors only and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.
- g. ABS 2013a; Unoccupied dwellings as a proportion of all dwellings counted on Census night – including unoccupied dwellings, and dwellings occupied by visitors only and other non-classifiable households. Noosa Shire and Douglas Shire based on SA1s which do not fully align with the LGA boundary.
- h. Real Estate Institute of Australia 2016;
- i. PHIDU 2014; Low income households = lowest 40% of incomes. Noosa Shire and Douglas Shire based on SA2s which do not fully align with the LGA boundary.
- j. See affordability analysis methodology in section **Error! Reference source not found.**



Appendix B. Projected dwelling need for residents according to no change, low change and high change scenarios – Additional tables

The tables below show the projected dwelling need for residents in 2036 given the assumptions described in section 6.4.2.



Table 1. Projected dwelling mix, No change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	0.5%	6.7%	7.2%	0.2%	0.2%	0.4%	0.2%	0.2%	0.4%	0.0%	0.0%	0.0%
Couple family with no children	3.0%	24.8%	27.8%	1.6%	1.4%	3.0%	1.4%	0.8%	2.2%	0.2%	0.1%	0.3%
Lone parent family - 2 people usually resident	0.6%	3.1%	3.7%	0.4%	0.2%	0.6%	0.5%	0.1%	0.6%	0.1%	0.0%	0.1%
Lone person household	3.4%	11.3%	14.7%	3.2%	1.4%	4.6%	4.1%	0.6%	4.7%	0.7%	0.1%	0.8%
Group household - 2 people usually resident	0.4%	2.0%	2.4%	0.3%	0.1%	0.4%	0.3%	0.2%	0.5%	0.0%	0.0%	0.0%
Total Small Households	7.8%	47.9%	55.7%	5.7%	3.3%	9.0%	6.6%	2.0%	8.6%	1.0%	0.3%	1.3%
Large Households												
Couple family with children - 4+ people usually resident	0.3%	13.6%	13.9%	0.1%	0.2%	0.3%	0.1%	0.2%	0.3%	0.0%	0.0%	0.0%
Lone parent family - 3+ people usually resident	0.2%	4.5%	4.7%	0.2%	0.2%	0.4%	0.1%	0.2%	0.3%	0.0%	0.0%	0.0%
All multi-family households	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Group household - 3+ people usually resident	0.0%	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
All 'other' households	0.1%	2.1%	2.2%	0.1%	0.2%	0.3%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%
Total Large Households	0.7%	22.6%	23.3%	0.4%	0.5%	0.9%	0.7%	0.4%	1.1%	0.0%	0.1%	0.1%
Total Households	8.6%	70.5%	79.1%	6.0%	3.8%	9.8%	7.3%	2.4%	9.7%	1.1%	0.3%	1.4%



Table 2. Projected dwelling mix, Low change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	0.7%	6.3%	6.9%	0.3%	0.3%	0.5%	0.2%	0.2%	0.5%	0.0%	0.0%	0.0%
Couple family with no children	3.0%	21.4%	24.4%	2.5%	2.3%	4.7%	3.1%	0.8%	3.9%	0.2%	0.1%	0.4%
Lone parent family - 2 people usually resident	0.8%	2.6%	3.5%	0.6%	0.2%	0.7%	0.6%	0.1%	0.7%	0.1%	0.0%	0.1%
Lone person household	3.4%	10.1%	13.5%	3.8%	1.4%	5.2%	4.8%	0.6%	5.4%	0.7%	0.1%	0.8%
Group household - 2 people usually resident	0.5%	1.7%	2.2%	0.3%	0.2%	0.5%	0.4%	0.2%	0.6%	0.0%	0.0%	0.0%
Total Small Households	8.3%	42.1%	50.5%	7.4%	4.3%	11.7%	9.1%	2.0%	11.1%	1.0%	0.3%	1.3%
Large Households												
Couple family with children - 4+ people usually resident	0.3%	13.6%	13.9%	0.1%	0.2%	0.2%	0.1%	0.2%	0.3%	0.0%	0.0%	0.1%
Lone parent family - 3+ people usually resident	0.5%	4.1%	4.6%	0.2%	0.3%	0.4%	0.1%	0.2%	0.3%	0.0%	0.0%	0.0%
All multi-family households	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Group household - 3+ people usually resident	0.0%	0.5%	0.5%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
All 'other' households	0.1%	2.1%	2.2%	0.1%	0.2%	0.3%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%
Total Large Households	1.0%	22.2%	23.3%	0.4%	0.6%	1.0%	0.7%	0.4%	1.1%	0.0%	0.1%	0.1%
Total Households	9.4%	64.4%	73.7%	7.8%	4.9%	12.7%	9.8%	2.4%	12.2%	1.1%	0.3%	1.4%



Table 3. Projected dwelling mix, High change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	0.9%	5.9%	6.7%	0.4%	0.4%	0.7%	0.2%	0.2%	0.5%	0.0%	0.0%	0.0%
Couple family with no children	3.0%	18.1%	21.1%	3.3%	3.1%	6.4%	4.8%	0.8%	5.5%	0.2%	0.1%	0.4%
Lone parent family - 2 people usually resident	1.1%	2.1%	3.2%	0.7%	0.2%	0.8%	0.7%	0.1%	0.9%	0.1%	0.0%	0.1%
Lone person household	3.4%	8.8%	12.2%	4.4%	1.4%	5.8%	5.4%	0.6%	6.0%	0.7%	0.1%	0.8%
Group household - 2 people usually resident	0.5%	1.5%	2.0%	0.4%	0.2%	0.6%	0.4%	0.3%	0.7%	0.0%	0.0%	0.0%
Total Small Households	8.8%	36.4%	45.2%	9.1%	5.2%	14.4%	11.5%	2.1%	13.6%	1.0%	0.3%	1.3%
Large Households												
Couple family with children - 4+ people usually resident	0.3%	13.6%	13.9%	0.1%	0.2%	0.2%	0.1%	0.2%	0.3%	0.0%	0.0%	0.1%
Lone parent family - 3+ people usually resident	0.8%	3.7%	4.5%	0.2%	0.4%	0.5%	0.1%	0.2%	0.3%	0.0%	0.0%	0.0%
All multi-family households	0.0%	2.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Group household - 3+ people usually resident	0.0%	0.5%	0.5%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
All 'other' households	0.1%	2.1%	2.2%	0.1%	0.2%	0.3%	0.5%	0.0%	0.5%	0.0%	0.0%	0.0%
Total Large Households	1.3%	21.8%	23.2%	0.4%	0.8%	1.1%	0.7%	0.4%	1.1%	0.0%	0.1%	0.1%
Total Households	10.2%	58.2%	68.4%	9.5%	6.0%	15.5%	12.3%	2.5%	14.7%	1.1%	0.3%	1.4%



Table 4. Projected dwelling mix, No change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	114	1,665	1,779	39	41	79	60	54	113	5	4	8
Couple family with no children	741	6,173	6,915	405	361	766	352	195	547	61	31	92
Lone parent family - 2 people usually resident	140	783	923	108	40	147	118	34	152	20	4	24
Lone person household	845	2823	3,668	799	346	1,145	1033	156	1,189	164	26	190
Group household - 2 people usually resident	109	491	600	63	28	91	82	47	130	10	0	10
Total Small Households	1,949	11,935	13,884	1,414	815	2,229	1,645	487	2,132	259	64	323
Large Households												
Couple family with children - 4+ people usually resident	86	3,378	3,464	23	37	61	27	46	72	7	9	16
Lone parent family - 3+ people usually resident	56	1,126	1,182	38	45	83	26	38	64	0	9	9
All multi-family households	12	487	499	0	0	0	0	0	0	0	0	0
Group household - 3+ people usually resident	11	119	130	4	11	15	0	16	16	0	0	0
All 'other' households	19	530	549	25	44	69	131	0	131	0	0	0
Total Large Households	184	5,640	5,824	90	137	227	184	100	284	7	18	25
Total Households	2,134	17,574	19,708	1,504	952	2,456	1,829	587	2,416	266	82	348



Table 5. Projected dwelling mix, Low change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	163	1,566	1,729	63	66	129	60	54	113	5	4	8
Couple family with no children	741	5,341	6,083	613	569	1,182	768	195	963	61	31	92
Lone parent family - 2 people usually resident	202	658	860	139	40	178	149	34	183	20	4	24
Lone person household	845	2,513	3,359	954	346	1,300	1,188	156	1,344	164	26	190
Group household - 2 people usually resident	122	428	550	76	40	116	95	60	155	10	0	10
Total Small Households	2,074	10,507	12,581	1,845	1,060	2,905	2,260	499	2,759	259	64	323
Large Households												
Couple family with children - 4+ people usually resident	86	3,378	3,464	23	37	61	27	46	72	7	9	16
Lone parent family - 3+ people usually resident	131	1,026	1,157	38	70	108	26	38	64	0	9	9
All multi-family households	12	487	499	0	0	0	0	0	0	0	0	0
Group household - 3+ people usually resident	11	119	130	4	11	15	0	16	16	0	0	0
All 'other' households	19	530	549	25	44	69	131	0	131	0	0	0
Total Large Households	260	5,539	5,799	90	162	252	184	100	284	7	18	25
Total Households	2,333	16,046	18,379	1,936	1,222	3,158	2,443	599	3,043	266	82	348



Table 6. Projected dwelling mix, High change scenario, Noosa Shire, 2036

Household Type	Separate House			Semi-Detached			Attached			Other Dwelling Type		
	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total	Small Dwellings	Large Dwellings	Total
Small Households												
Couple family with children - 3 people usually resident	213	1,467	1,680	88	90	178	60	54	113	5	4	8
Couple family with no children	741	4,509	5,251	821	777	1,598	1,184	195	1,379	61	31	92
Lone parent family - 2 people usually resident	264	534	798	170	40	209	180	34	214	20	4	24
Lone person household	845	2,204	3,049	1,109	346	1,455	1,342	156	1,499	164	26	190
Group household - 2 people usually resident	134	366	500	88	53	141	107	72	180	10	0	10
Total Small Households	2,198	9,080	11,278	2,276	1,305	3,582	2,874	512	3,386	259	64	323
Large Households												
Couple family with children - 4+ people usually resident	86	3,378	3,464	23	37	61	27	46	72	7	9	16
Lone parent family - 3+ people usually resident	207	926	1,132	38	95	133	26	38	64	0	9	9
All multi-family households	12	487	499	0	0	0	0	0	0	0	0	0
Group household - 3+ people usually resident	11	119	130	4	11	15	0	16	16	0	0	0
All 'other' households	19	530	549	25	44	69	131	0	131	0	0	0
Total Large Households	335	5,439	5,774	90	187	277	184	100	284	7	18	25
Total Households	2,533	14,519	17,051	2,367	1,492	3,859	3,058	612	3,670	266	82	348



Appendix C. New Housing Models/Initiatives for Consideration

Tiny house movement and affordability

The 'tiny house' movement began in the late 1990s in the USA in response to housing affordability issues and sustainable living trends (Shearer 2015). The movement is also active in Australia, with local tiny house enthusiasts driven by similar ideals of economic freedom and environmental sustainability (Shearer 2015).

Heather Shearer (2015) has conducted research into the motivations, benefits and limitations of tiny houses in relation to affordable living issues in Australia. Although the research is ongoing, she notes a number of findings based on pilot research involving a questionnaire, semi-structured interviews and social media analysis:

- The top three drivers for building a tiny house for respondents of the survey were: the desire for freedom, to reduce overall costs and for sustainable living.
- The top three barriers to building a tiny house for respondents were: that land is too expensive, regulation is complex and planning scheme barriers (followed by building code barriers and other legal issues).
- The qualitative analysis (social media analysis and discussions with enthusiasts) similarly found that the interest in the tiny house movement was predominately influenced by housing affordability and economic issues, with a number of respondents fearful of becoming homeless.
- Barriers to building a tiny house expressed in the qualitative analysis included economic issues also, including: where to locate the house and high land prices, insufficient cash, how to access mortgage finance, and lack of capital gains.

In relation to these findings, Shearer notes the following additional research findings:

- Small houses and temporary houses exist already in Australia, including granny flats, converted sheds, relocatable homes, beach shacks, caravans and even houseboats.
- Planning scheme regulations tend to restrict additional dwellings, temporary occupation and the number of houses per lot. There are also regulations around land subdivision sizes, minimum house sizes, dual occupancy restrictions, water and power connection requirements, infrastructure charges, etc. which impact the affordability of tiny houses, or encourage people to bypass these regulations by building moveable dwellings. Tiny houses are generally less than 40m² and are often built on a mobile foundation due to legal and financial constraints (rather than for mobility).
- Due to unaffordable land options and planning constraints, tiny houses might be more commonly built or placed in backyards, on the urban fringe or in rural areas – which may contribute to longer commutes and other impacts which reduce their affordability and sustainability credentials.
- Sourcing mortgage funding and insurance for non-conventional or temporary dwellings can be an issue (so generally a higher interest loan than a regular mortgage), and land sharing arrangements can create issues in relation to tenure, future resale, and first home owner's grants and stamp duty concessions.
- Although there are a number of people interested in the movement and involved in social media groups (such as Facebook groups etc.), few of the participants in these groups had actually built tiny houses or were living in them.



Shearer notes that tiny housing may not contribute substantially to housing affordability issues as:

- Tiny housing appeals to a small group and therefore there is unlikely to be sufficient demand to make this a viable solution to the affordability issue.
- Housing affordability is generally an urban issue and tiny houses “are not going to address the underlying dynamics of land supply and demand in urban areas” and doesn’t overcome the issue of land being unaffordable. People want access to hospitals, schools, family, employment, public transport etc. and therefore will continue to prefer inner city locations where land is more expensive.
- The tiny house movement however could create change more broadly by encouraging smaller house sizes.

Micah Projects proactive social programs

‘Micah Projects’ provides a range of services and programs. They assist people experiencing poverty, homelessness, mental illness, domestic violence, disability or discrimination, providing a range of holistic, evidence-based programs. Some of their programs include:

Housing first strategy for homelessness

The ‘housing first’ approach is an approach to addressing homelessness where housing is provided to people first, rather than people ‘getting better’ or moving through transitional short-term housing before a long-term housing strategy is organised. Housing first requires that suitable, long-term housing be rapidly identified and provided, together with the services that individuals and families require to continue on in this housing.

Can be delivered at:

- *Scattered sites*: Housing units located throughout the city, with units being either sub-leased from service provider, or public/social housing.
- *Single site housing*: Housing units located together with on-site support and tenancy management services. Brisbane Common Ground is an example of single site housing. It’s a purpose-built apartment complex in South Brisbane offering 146 units – both affordable housing, and for people who were formerly homeless. Support services and tenancy management are located on site. Common areas are provided for groups of units.

A research project examining the benefits of the ‘housing first’ approach in Brisbane was recently undertaken with a cohort of 12 homeless people (Mason and Grimbeek 2013). The study suggested various benefits and limitations of scattered sites and single site housing:

- *Single site housing*: Offers safety, control of visitors, access to assistance and support, on-site health services, long term and stable accommodation, and connected units/floors in the building contribute to community relationships.
- *Scattered sites*: Individual choice including more choice of dwelling type especially important for families, community living, support from workers, and telephone support.

A Project Example Pathways - Hospital Admission and Surcharge Pilot Project

‘Pathways’ is a post-hospital discharge service designed to provide person centred admission and discharge planning, care coordination, direct nursing care and housing assistance in the community (Micah Projects 2016). A key objective of the Pathways initiative is to improve the



services provided to homeless and vulnerably housed people when they are discharged from hospital. The pilot aims to reduce rates of potentially preventable hospital (re)admissions by integrating housing and healthcare outcomes.

Micah Projects staff – through the Brisbane Homeless Service Collaborative (BHSC) and St Vincent’s Private Hospital Brisbane nurses – worked with partnering hospital units across the Royal Brisbane and Women’s Hospitals and Princess Alexandra Hospital to establish the Pathways Pilot program. Pathways targets vulnerable populations who are homeless or vulnerably housed with multiple and complex health and social support needs prior to discharge from hospital.

Funding from Queensland Health for \$239,000 per annum plus a small amount of additional resources from Micah Projects and the Mercy Sisters has allowed for the provision of 60 hours of nursing care each week, two days of project and clinical management, and operating costs.

During the 12 month pilot period, 130 referrals to the project were received and of these, 88 people were supported longer-term. These 88 people had been homeless for an average of 2.24 years, 75% used drugs or alcohol, and a similar percentage identify as having a mental health condition. In the 30 days prior to entry in the program, these 88 people on average had each presented to the emergency department twice, had used ambulance services 1.5 times, and had 1.2 inpatient hospital visits. The pilot project found a clear financial incentive to working proactively on health and housing issues, by reducing the number of more expensive ambulance uses and hospital visits.

The Nightingale Model

The Movement

Nightingale Housing is a social enterprise that supports, promotes and advocates for adequate housing that fosters environmental and social sustainability and strengthens communities.

By way of material reduction, it seeks to implement an ideology of simplicity. The movement envisions an architecture governed by humanity and functionality - buildings that satisfy fundamental needs complemented by the beauty of architectural delight.

Its principles are to:

1. Advance environmental sustainability through design (including sustainable transport options).
2. Design for social connection, connection to services and community management.
3. Contribute positively to neighbourhoods and urban culture through quality urban design.
4. Promote affordability by providing access to housing purchase at cost.
5. Minimise the on-going costs of living in the housing through design.
6. Educate designers, potential home owners and the public in deliberative development and sustainable housing models.
7. Collaborate with groups of purchasers in cooperative, syndicate or collective planning and participation.



Nightingale Housing currently has 4 projects in progress, all being undertaken by award winning architects who are highly regarded leaders in the design industry.

The Model

Nightingale Model projects are triple-bottom-line, mixed-use apartment developments led by Architects. They aim to deliver apartments that are environmentally, socially and financially sustainable. The ultimate goal of the projects is to provide quality value for money urban housing by simplifying both the development process and the building itself.

The status quo development model is said to build meaningless apartments designed to investor specifications for maximum yield with little or no regard for the people who will live there or the building's impact on the local and broader environment. The Nightingale movement believes their city (Melbourne) deserves beautiful, affordable, well-built and well-sized apartments designed for real life. At present, few developers are delivering this and as long as their current formula remains profitable, they do not have an incentive to do so.

The Nightingale Model has been envisioned to catalyse an industry change through projects that deliver great buildings while making a fair and reasonable (but not excessive) return on investment. Nightingale Model Projects are funded by investor groups that have a genuine interest in quality urban housing.

Where appropriate, Nightingale Model projects aim to deliver car-free projects to reduce the cost of apartments while encouraging a shift to sustainable modes of transport. Apartments are to be well proportioned and sold to people who want to live there and who need a better value option than is currently available in the market.

A Project Example – Fairfield NSW

72a Station Street, Fairfield was purchased due to its direct access to multiple forms of public transport, excellent existing social infrastructure, community feel and existing planning permit for a 5 level office building (see <http://nightingalehousing.org/nightingale2/>).

The architects saw the existing permit for a bland office building as a poor design outcome for the site and surrounding area. Revisiting this provided an excellent opportunity to propose a more engaging design response, at the same scale as the approved building, to enhance and strengthen the quality and vitality of the station retail precinct.

At present the Nightingale Model database consists of over 800 interested purchasers. During the design process for Fairfield, the database was surveyed and 180 responses were received from purchasers interested in living at 72a Station Street without access to an onsite car park or on-street resident parking permit.

The results of the survey directly informed the building design, apartment size and mix. 17% of respondents confirmed a desire to purchase larger three bedroom apartments. As a result, along with one and two bedroom apartments, 4 x 102m² three bedroom apartments have been included in the proposal.

The proposal consists of four levels of one, two and three bedroom apartments, sitting above three retail tenancies. The tenancies are designed to help with street activation and improve the amenity of the station precinct. Victrack and PTV are both keen for the development to assist with improving the safety of the station environment.



The apartments above are all designed with liveability and environmental sustainability as driving attributes. Apartments have high ceilings, northerly aspect, cross ventilation and natural light to all habitable rooms. As well as each apartment enjoying a private balcony, the roof top is dedicated to communal use, containing laundry, clothes lines, vegetable gardens and a large outdoor dining and social environment. The building is designed to be visibly active and inhabited and to facilitate the fostering of community for its occupants while significantly adding to the amenity of the Railway Place and station precinct.

Given the significant level of demand for Nightingale Model apartments a ballot system is being designed to ensure equitable allocation.

The architects are aware of concerns held about the building not providing car parking and perceived impacts on both residents and traders. However, it is important to note that the development has been specifically promoted to potential future residents who choose not to own a car. Each potential future resident has been made fully aware that they will not be eligible for resident parking permits. Whilst not for everyone, exclusive use of alternative modes of transport is increasingly being seen as a viable and desirable alternative to private car ownership for many people in the inner city. Experience at previous projects, such as The Commons, also suggests that future residents are highly likely to meet most of their daily shopping needs in the Station Street Village, supporting local traders.

The proposal was publicly advertised for a 3 week period in March 2016. During this period, Darebin City Council received over 200 letters of support. Forty-one objections were also received. Darebin City Council made a decision in favour of the planning application on 23 May 2016. An application for review of the Council's decision at VCAT has been lodged by 17 local objectors.

Given the strong focus the project has on reducing apartment costs while delivering high quality, sustainable homes, this is a disappointing outcome to its promoters. The financial aims of Nightingale Housing projects are transparent, and the targeted profit margin is set at the minimum level allowable by the banks, who are needed to lend money for construction.

The appeal process will cause a delay for the project, along with significant legal and holding costs (\$50,000-75,000), which will ultimately result in more expensive apartments for purchasers.

Homes that Fit

A pilot program in Finland has seen a small group of young people live together with seniors in a Helsinki home, in return for spending a number of hours a week with their elderly neighbours. The project aims to prevent homelessness in young people by helping them with secure and affordable housing, while at the same time increasing social interactions of the senior residents. Helsinki is a city of young adults and senior citizens, and is an expensive city with long waiting lists and high rents which many young people can't afford. Loneliness amongst seniors, and also amongst young people is a problem.

The co-housing arrangement is modelled after a Dutch example where students live in a nursing home and spend time socialising with the residents. The focus is on informal interaction between the young people and the residents.

Rudolf Seniors Home is an old apartment building with stairs, making it a difficult structure for seniors to move around in. Because of this there were 3 vacant studio apartments which seemed the ideal fit for the project. Early 2015 the City of Helsinki started a recruitment process on



Facebook, which received an overwhelming 312 applications. Applicants were between 18 and 25 years of age, had housing difficulties and an interest in spending time with the elderly. A minimum of 5 hours a week would have to be spent socialising with the seniors in the home. Eventually 3 young people were chosen.

The response from the young people has been very positive, saying they felt very welcome and enjoy the time they spend together with their elderly neighbours. The main result from the first 9 months of the project is that the feeling of isolation of older people has decreased significantly. They have said that they feel more normal and the young people are like a peer group. Older residents have more social contacts and the atmosphere in the house has changed.

Rudolf Seniors Home houses 134 seniors and adding only three young people to the mix has highlighted that there should be more young people in the senior home to optimise the social interaction opportunities. However they have reported to feel the pressure of not being able to spend enough time with each resident.

The 'Homes that Fit' model is spreading through Finland with another few cities implementing similar projects. It provides a model for mixed housing solutions that could be considered in the planning and construction stage of aged care homes.

Inside Story of How Melbourne Became Marvellous All Over Again³⁶

In 1994, Melbourne City Council embarked on a groundbreaking study of its citizens and their city. Places for People was carried out again in 2004, and is now nearing completion for a third time - giving Melbourne a contemporary record and 20-year archive that only a handful of cities can boast. "Almost unique, especially in that part of the world," says Danish architect and urban design guru Jan Gehl, who pioneered Places for People in Copenhagen. Melbourne was one of his first foreign experiments. Under Gehl's guidance, Melbourne started watching its people closely - where did they come from, how did they get here, where did they go, how did they go there, where did they linger, where did they sit and where did they stroll?

Out of this attention to the smallest details - even the colour of the pavement and the awnings on the buildings - the MCC now has 20 years of hard numbers - data credited with underpinning all that global praise about Melbourne's 'liveability'. By this measure, Gehl considers Melbourne in 2014 close to the global gold standard - and that's as much a surprise to him as anybody, given what the CBD was like when he first saw it in 1976.

Robert Doyle quotes a 1978 *Age* article decrying "an empty, useless city centre". Former Labor premier John Cain says: "Very much a dead heart." Jan Gehl: "Completely neutron bombed." "There were only about 100 residents in the CBD. There was nobody there ... what we did was say, 'We've got to enable the buildings to house people and we've got to bring the street life back.'"

The most significant impact was the arrival in 1983 of a migrant, urban designer Rob Adams, of Zimbabwe, who was employed by Melbourne City Council (MCC). He too found a city whose workday population seemed to be sucked out to the suburbs at 5pm as if by a giant vacuum. "It was deserted. The biggest change was realising that city's didn't have to be like that."

³⁶ Excerpts from *The Age*, Article November 1 2014, by Neil McMahon. Available at <http://www.theage.com.au/victoria/inside-story-of-how-melbourne-became-marvellous-all-over-again-20141030-11d7f9.html>



Adams was a believer, and he had high-level support. In 1985, he delivered a strategy that essentially set out all he wanted to do - and predicted nearly all of what has actually happened since. But the big picture needed micro-detail to bring the vision of a populated, people-friendly CBD to street-level life. Gehl's Places for People research delivered that element when the MCC brought him out in 1993.

Adams says such detail has enabled change in an age of tight budgets - small scale and incremental. Things like building frontages and lighting influence the way people perceive streets as places to stop, sit or shop - and also perceptions of safety. Doyle calls it "the palette of the city" - and underfoot, the city is getting durable, attractive bluestone footpaths as a result. Gehl's research delivered "the human dimension"...

They (now) describe the 116,431 people now living in the CBD, and the 28,099 city residences; the 100,000 pedestrians using Swanston Street on a Saturday night; the average 840,000 people thronging the city every weekday - a number that sometimes tops 1 million.

