



## CYGNET RESIDENTIAL DEMAND AND SUPPLY ANALYSIS

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# EXECUTIVE SUMMARY

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SGS Economics and Planning was engaged to undertake a residential land demand and supply study for the town of Cygnet within the Huon Valley Council.

The town of Cygnet has been experiencing high demand for housing over recent years due to the popularity of the town for families and smaller households (including retirement). SGS Economics and Planning, in this report, analysed the demand for housing in Cygnet and the existing supply of residential land. This analysis was performed to understand the adequacy of existing vacant residential land in Cygnet within the Urban Centre and Locality (UCL) and the Urban Growth Boundary (UGB).

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

The report contains four chapters:

1. Documentation and results of housing demand modelling for Cygnet
2. Estimation of capacity for new housing in Cygnet (UCL and UGB) and gap analysis to determine the adequacy of current supply of residential land
3. Commentary on planning principles and land demand allowances
4. Findings and conclusion.

Demand for housing in Cygnet is strong. To 2036 it is estimated that there will be demand for another 524 dwellings in the Cygnet area from 2020. If it was assumed that about eighty per cent of demand would be accommodated on residential land (as opposed to lower density lifestyle area outside of the UGB), demand would be 419 dwellings.

The capacity analysis indicates that currently there is the capacity to provide another 92 to 165 new dwellings in the Cygnet urban growth boundary to 2036, and 91 to 163 new dwellings in the Cygnet urban centre locality depending on dwelling density and realisation rates. If HVC land in the George Street redevelopment area is developed, the high capacity scenario increases to 209 and 207 dwellings for the UGB and UCL respectively. The capacity analysis is based on an assessment by the planning department of Council on the number of lots that could be created on vacant lots; and on two realisation rates reflecting the extent to which these lots may actually be used to enable further development<sup>1</sup>.

As it currently stands, there is an acute shortage to meet all demand. There is not sufficient land to meet demand for the next ten to fifteen years. As a rule of thumb, there should be approximately fifteen years of vacant supply in order to not adversely affect housing affordability and prevent land banking and/or speculative behaviour. Indeed, evidence shows that affordability is already decreasing and some household types (for instance on minimum wages) may already struggle to meet housing costs.

The insufficient supply means that potential residents cannot move to or remain in Cygnet due to insufficient choice and affordability pressures.

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<sup>1</sup> Keeping in mind that many households may choose a large garden over a subdivision, or may want to reserve the option to subdivide to a later stage in life.

# 1. INTRODUCTION

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## Housing demand

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

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

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

## Housing capacity

SGS has reviewed vacant residential land supply and historic uptake data collected by HVC. For each parcel of land identified as vacant and suitable for housing, SGS used HVC's categorisation based on its likely timeframe to be development ready and available to the market.

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

## Commentary

SGS provides commentary on the adequacy and currency of planning guidances in light of overarching planning objectives of urban consolidation, prevention of urban sprawl and prevention of fragmentation of agricultural land. Further, SGS has used data from our award-winning Rental Affordability Index to comment on housing affordability.

## Findings and recommendation

Conclusions and recommendations are drawn concerning the need for future planning around supply of land in Cygnet.

# 2. HOUSING DEMAND

## 2.1 Introduction and purpose

An assessment of population and demographic trends has been undertaken to develop an understanding of the underlying forces which are driving growth and demand for dwellings in the Huon Valley LGA and Cygnet. Beyond population and dwelling forecasts, this section also considers typology and housing choice.

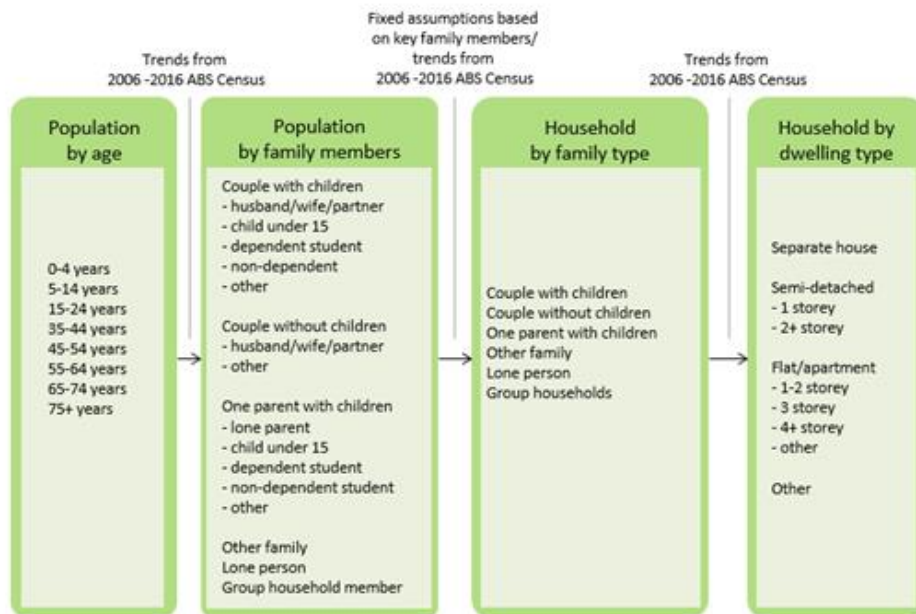
The purpose of the analysis is to forecast housing demand in Cygnet to the year 2036. Two scenarios are provided to illustrate the housing demand under high growth and moderate growth trends. Assumptions for the scenarios are drawn from analysis of historic housing growth in Cygnet and Huon Valley LGA.

## 2.2 Approach

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

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

FIGURE 1: SGS HOUSING DEMAND MODEL METHOD



Source: SGS Economics and Planning

Demand for different dwelling type shifts throughout an individual's lifespan, due to income levels, the structure of the household they live in and preferences. To that end, changing demographics and the changing relationship between household types and dwelling types described will impact upon future housing choices. In regional areas, like the Huon Valley, housing type preferences are strongly skewed towards separate houses, but the ageing of the population will likely drive a slight increase in demand for units (referred to as flats/apartments).

The model's base scenario is run off historically observed household and dwelling compositions in the LGA – generating a 'business as usual' forecast of the future if there are no major shifts in population/demographic trends or supply/capacity constraints.

The model is run at the LGA level as this is the level that population forecasts by age group from the Tasmanian Government are available. Using the outputs for the Huon Valley LGA, the housing demand for Cygnet was calculated with: trends adjusted to reflect the on-the-ground experience under the high scenario; and trends held constant to reflect a milder housing growth rate under the moderate scenario.

## 2.3 Population growth

The Tasmanian Department of Treasury and Finance has prepared population projections for Tasmania's Local Government Areas for 25 years (2017 to 2042)<sup>2</sup>. Table 1 below shows population forecasts for the Cygnet SA2 based on the population at the 2016 census and the population growth rates for the Huon Valley LGA from the Treasury projections.

The Tasmanian Government's projections have three series, based on different assumptions - high, medium, and low. The medium and high series are shown here (Table 1).

TABLE 1: POPULATION GROWTH COMPARISON OF DIFFERENT SERIES, CYGNET

Series	2016	2021	2026	2031	2036
High	4,266	4,561	4,843	5,111	5,347
Medium	4,266	4,522	4,728	4,903	5,040

Source: Tasmanian Government 2019

Table 2 shows the assumptions the Tasmanian Treasury used to estimate the population forecasts by scenario.

TABLE 2: ASSUMPTIONS FOR POPULATION GROWTH SERIES

Series	Fertility (total fertility rate)	Mortality (life expectancy at birth)	Net Interstate Migration	Net Overseas Migration	Average annual growth rate (AAGR)
High	Increasing from 1.96 babies per woman in 2017, to 2.10 babies per woman by 2028	To reach 86.0 years for males and 88.5 years for females by 2067.	Net gain of 1,200 persons per year to Tasmania (+0.3% to population in 2017)	Net gain of 2,100 persons per year to Tasmania (+0.4% to population in 2017)	0.74% to 2036 0.62% per annum to 2067
Medium	Constant rate of 1.96 babies per woman.	To reach 82.4 years for males and 85.2 years for females by 2067.	Zero net interstate migration.	Net gain of 1,800 persons per year to Tasmania. (+0.34% to the population in 2017)	0.38% to 2036 0.20% per annum to 2067

Source: Tasmanian Government 2019

<sup>2</sup> <https://www.treasury.tas.gov.au/economy/economic-data/2019-population-projections-for-tasmania-and-its-local-government-areas>



Table 3 below compares the recent experience in Cygnet to these scenarios. It shows that growth in Cygnet has been trending above the high growth scenario from the Treasury forecasts for the Huon Valley municipality.

TABLE 3: COMPARISON OF CYGNET POPULATION GROWTH TO POPULATION PROJECTIONS

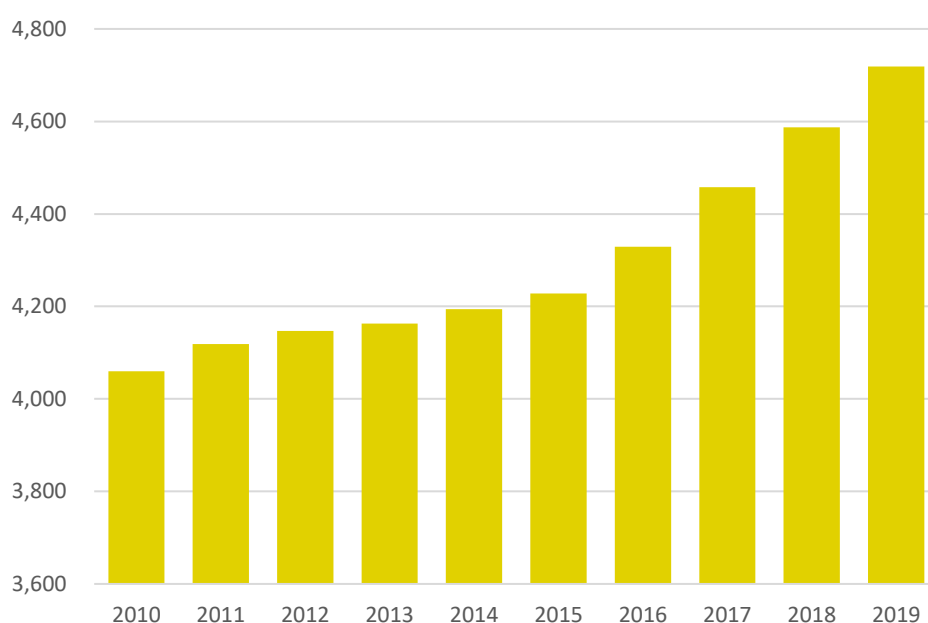
Series	Fertility (total fertility rate)	Mortality (life expectancy at birth)	Net Interstate Migration	Net Overseas Migration	Average annual growth rate (AAGR)
Actual in Cygnet 2017 to 2019	A natural increase in the population of 49 (124 births and 75 deaths) indicating a replacement rate above 2.0 (high scenario)	Not available	Net internal migration of +291 over three years (+2% per annum). This is well above the high series rate but does include intrastate movements	Net overseas migration of +50 over three years (+0.4% per annum). This is equivalent to the high series for Tasmania.	2.9% per annum from 2017 to 2019. This is well above the high series for Tasmania

Source: SGS Economics and Planning 2020 using ABS (2020) estimated residential population by components, SA2 level.

This can partially be explained by a key shortcoming of the Treasury projections: the projections do not take into account internal migration patterns within Tasmania. As stated in the Huon Valley Economic Development Strategy 2015-2020, the Huon Valley is influenced significantly by its relative proximity to Tasmania's capital city Hobart and the neighbouring municipal area, Kingborough. The proximity to these two denser populated areas, coupled with lower average house prices, means that to first homeowners and other low-medium income earners, Cygnet offers considerable appeal.

Strong population growth has been evident in Cygnet over the past decade (Figure 2). Between 2010 and 2019 the average annual growth rate was 1.7 per cent per annum. This has increased to 2.4 per cent over the past five years, and 2.9 per cent in the past three. As a result, the figure below also reveals that the population forecast for Cygnet in 2021, using the Treasury growth rates for the Huon Valley (Table 1), has already been met by 2019, even under the high scenario.

FIGURE 2: ESTIMATED RESIDENT POPULATION IN CYGNET SA2



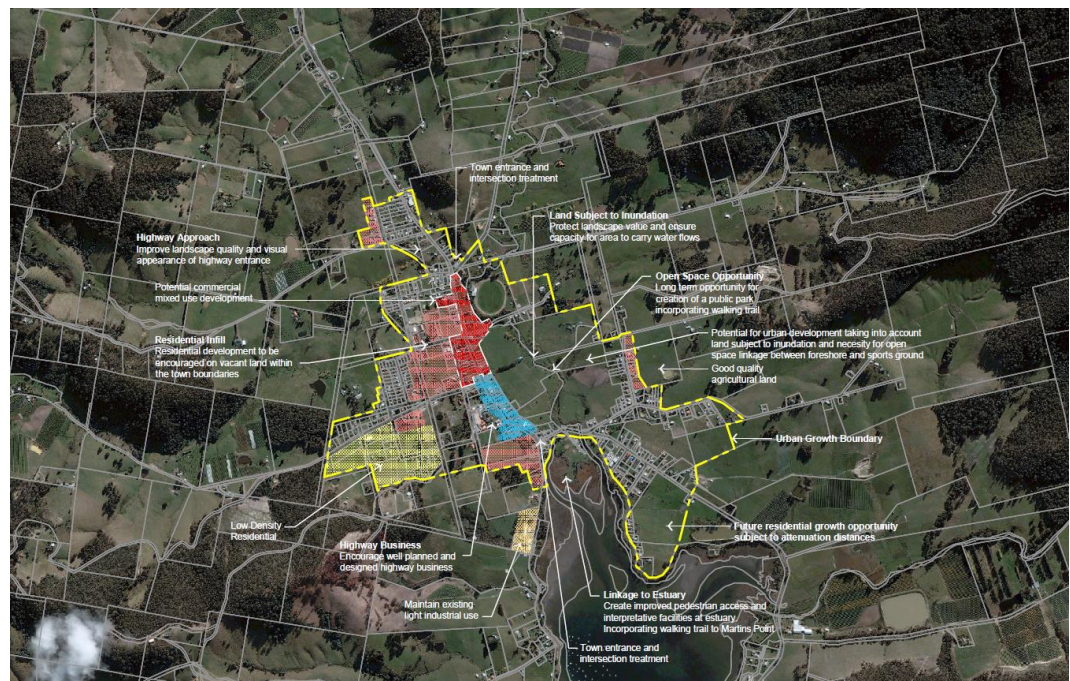
Source: ABS (2020) estimated residential population by components

### Take-up of vacant residential land

The take-up of vacant residential land is another indicator of housing demand. The Southern Tasmanian Regional Land Use Strategy (STRLUS) assumed a moderate growth trajectory for Cygnet which corresponds to an annual average growth rate of 0.9 per cent per annum for Cygnet.

Table 4 shows the rateable properties for vacant residential land and non-vacant residential land within the Urban Centre Locality (UCL) area of Cygnet and also within the Urban Growth Zone for the years 2011, 2013, 2016 and 2019. The UCL is an ABS geography to capture data for individual towns. The UCL for Cygnet is slightly larger than the Urban Growth Centre boundary. The Urban Growth boundary for Cygnet (Figure 3) is referred to on the Cygnet Strategy map of the Huon Valley Land Use and Development Strategy and has been used by Council for planning purposes, in particular, prior to the commencement of the current planning scheme.

FIGURE 3: CYGNET URBAN GROWTH BOUNDARY



Source: GHD

The data shows that the number of non-vacant residential properties has increased by 83 since 2011 in the UCL, a compounded growth rate of 2.7 per cent per annum. The total growth rate for Cygnet is 2.4 per cent per annum.

TABLE 4: RESIDENTIAL LAND, CYGNET

<b>RATED LAND</b> (as at 1 July of each year)	<b>Cygnet Urban Centre Locality (UCL)</b>	<b>2011</b>	<b>2013</b>	<b>2016</b>	<b>2019</b>
	<b>Vacant residential land</b>	45	74	80	56
	<b>Non-Vacant Residential land</b>	347	366	399	430
<b>RATED LAND</b> (as at 1 July of each year)	<b>Urban Growth Centre - Cygnet</b>	<b>2011</b>	<b>2013</b>	<b>2016</b>	<b>2019</b>
	<b>Vacant residential land</b>	48	63	48	36
	<b>Non-Vacant Residential land</b>	358	376	394	419

Source: Huon Valley Council, received August 2020

Table 5 shows the applications for subdivisions lodged between 2007 and 2020, for subdivisions within the Cygnet Urban Centre and Locality (UCL); and Cygnet Urban Growth Boundary (UGB) areas that were completed such that Final Plans for these subdivisions were

able to be sealed to enable lots to be created (or for relevant stages of a subdivision). The period before 2011 saw applications for larger scale subdivisions ranging between 20 and 30 lots, which were mainly driven by the new estates located along Silver Hill Road (Devereaux Court and Dorgan Court) and Mary Street (Lourdes Rise). An application of 29 lots was lodged in 2011 on 27 Silver Hill Road, which is outside the boundary of the Cygnet UGB but within the Cygnet UCL. The period post 2011 saw a decrease in the size of subdivision applications. Applications during this period were characterised by infill development with subdivisions ranging between 1 to 3 lots.

TABLE 5: APPLICATIONS OF APPROVED SUBDIVISIONS TO FINAL PLAN STAGE, CYGNET UCL AND UGB

Application year	Subdivision	Address	Additional lots from approved subdivision	Final Plan sealed - 2011	Approval	Final Plan sealed
2007	SUB-4/2007	24 Silver Hill Road (Devereaux Crt)	19	Final Plan sealed - 2011	2011	FP sealed
2008	SUB-11/2008/A	Mary Street - Lourdes Rise	25	Final Plan sealed - 2011	2011	FP sealed
2012	SUB-81/2012	24 Dances Road	1		2013	FP sealed - 2013
2012	SUB-43/2012	11 Emma Street	1		2013	FP sealed- 2018
2012	SUB-47/2012	5 Smith Street	1		2013	FP sealed -2018
2011	SUB-7/2011	27 Silver Hill Road (Dorgan Crt)	9	Final Plan sealed for stage 1 (9 lots) - 2015	2015	FP sealed
2011	SUB-7/2011	27 Silver Hill Road (Dorgan Crt)	20	Final Plan sealed for stage 2 (20 lots) - 2016	2016	FP sealed
2017	SUB-18/2017	7406; 7404; 7402 Channel Highway	3		2019	FP sealed- 2019
2017	SUB-3/2017	8 Frederick Street	2		2017	FP sealed- 2020
2017	SUB-1/2017	5 Smith Street	1		2017	FP sealed- 2018
2017	SUB-37/2017	10 Charles Street	8	Plan sealed for stage 1 (8 lots) 2019; (Stage 2 TBC)	2019	FP sealed
2018	SUB-32/2018	32 Christina Street	2		2019	FP not sealed
2020	SUB-29/2020	14 George Street	1	Final Plan sealed - 2011	2019	FP Sealed

Source: Huon Valley Council, received August 2020

Other subdivision lot data for the period 2011-2019 for approved subdivisions in Cygnet are shown in Table 6<sup>3</sup>. It shows that over the past 9 years 110 lots have been created in Cygnet.

The three major releases in this time were Devereaux Court (19 lots in 2011), Lourdes Rise (27 lots in 2011) and Dorgan Court (29 lots across 2015 and 2016). Satellite imagery (Figure 4) reveals that the take-up rate of these sub-divisions has been high, with only a few vacant lots remaining in these three sub-divisions (at April 2019).

TABLE 6: APPROVED SUBDIVISIONS, CYGNET

Subdivisions (not including approved boundary adjustments as boundary adjustments do not create additional lots)	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
Number of lots created	53 lots	4 lots	4 lots		8 lots (+1 x POS lot) Total: 8 lots Stage 1 - Dorgan Court comprised 8 lots plus 1 x Public Open Space lot	2 lots + 20 lots Total: 22 lots Stage 2 of Dorgan Court subdivision comprised 20 lots	10 lots	8 lots	1 lot + Balance	110 lots

Source: Huon Valley Council, received August 2020

FIGURE 4: DEVEREAUX COURT (TOP LEFT) AND DORGAN COURT (BOTTOM RIGHT) IN 2012



Source: Google Earth, accessed August 2020

<sup>3</sup> This data does not include boundary adjustment approval information as no new lots are created by that process, and does not include data between 2011-2019 for approved subdivisions that were withdrawn after lodgement, or for approved subdivisions that subsequently lapsed

FIGURE 5: DEVEREAUX COURT (TOP LEFT) AND DORGAN COURT (BOTTOM RIGHT) IN 2019



Source: Google Earth, accessed August 2020

## 2.4 Housing demand scenarios

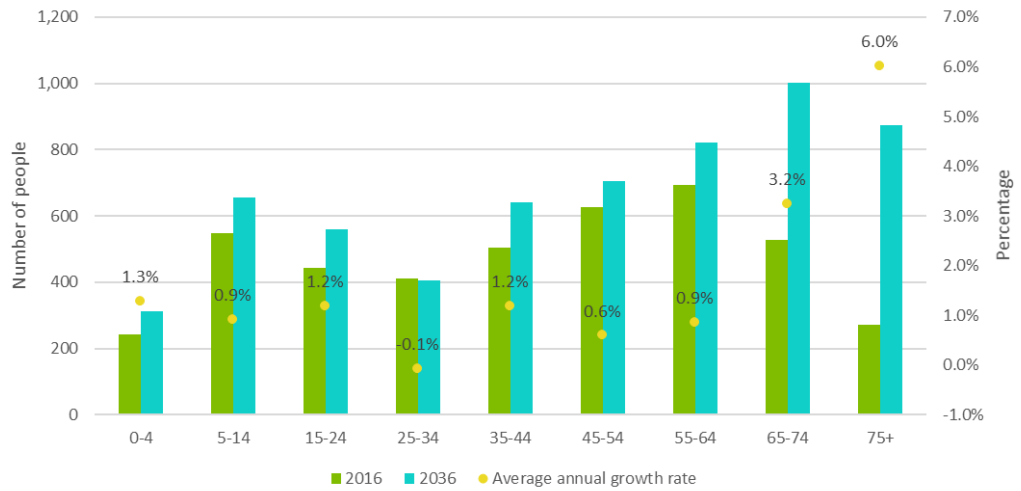
All the historic evidence above suggests that demand for residential lots is growing faster in Cygnet than predicted by official government population projections produced by Treasury, as well as what is assumed in the STRLUS.

SGS prepared two scenarios to establish a range in which housing demand in Cygnet might occur. Housing demand under a high growth scenario and a moderate growth scenario will be discussed in the next section. Under the high growth scenario, dwelling growth of 2 per cent per annum has been applied to forecast housing demand. For the moderate growth scenario, the dwelling demand rate is 1.5 per cent per annum.

### Age distribution

The age profile of the population is also projected to change, impacting the types of dwellings demanded, with major growth in aged population cohorts. The current and projected age profile for residents in the Cygnet SA2 under the high and moderate growth scenarios are shown in Figure 6 and Figure 7. Trends of an aging population profile can be observed under both scenarios, as the dominant age groups are anticipated to shift from 45 to 64 in 2016 to 65 to 75 by 2036. This reflects that people are growing older and remaining healthy and independent for longer. It is expected most of the older people in Cygnet will remain living independently, particularly if housing options are provided to them. Similarly, an adequate supply of land for detached housing will allow young families to move into Cygnet.

FIGURE 6: POPULATION PROJECTION AND GROWTH RATE BY AGE (HIGH GROWTH), CYGNET SA2



Source: ABS Census; Tasmanian Government 2019; and SGS Economics and Planning

FIGURE 7: POPULATION PROJECTION AND GROWTH RATE BY AGE (MODERATE GROWTH), CYGNET SA2



Source: ABS Census; Tasmanian Government 2019; and SGS Economics and Planning

## 2.5 Housing demand model results

### Forecast dwelling demand

Table 7 and Table 8 summarise the results of the housing demand modelling under the high and moderate growth scenarios. The results are derived from the *Housing Demand Model* using ABS Census data patterns in demographics and housing types from 2001 to 2016 and population growth forecasts to 2036 for the Cygnet SA2.

Under the high growth scenario, the model indicates that while the highest growth rate between 2020 and 2036 is likely to be for semi-detached dwellings (3.4 per cent per annum), the dwelling mix in Cygnet will still be dominated by detached (separate house) dwellings. Demand for separate houses is expected to grow 1.9 per cent per year between 2020 and 2036. The preference for separated houses in Cygnet will drive demand for 678 residential lots to 2036. The projected demand for semi-detached, unit and other dwellings types adds to demand by another 50 dwellings to 2036. The demand for semi-detached and units may or may not occur on strata-titled lots.

In total, the model shows that 729 new dwellings are to be demanded by 2036 in the Cygnet SA2 area, which translates to an increase of 2 per cent per annum.

TABLE 7: DWELLING DEMAND FORECAST 2020 TO 2036 (HIGH GROWTH), CYGNET SA2

Dwelling type	2020 <sup>4</sup>	2021	2026	2031	2036	2020 to 2036 Growth	AAGR <sup>5</sup> 2020 to 2036
Separate house	1,874	1,920	2,135	2,349	2,553	678	1.9%
Semi Detached	26	27	33	38	44	18	3.4%
Flat, unit or apartment	27	28	32	36	40	12	2.3%
Other	41	42	48	54	60	20	2.5%
<b>Total</b>	<b>1,968</b>	<b>2,017</b>	<b>2,247</b>	<b>2,477</b>	<b>2,697</b>	<b>729</b>	<b>2.0%</b>

Source: SGS Housing Demand Model (2020)

Modelling results under the moderate scenario shows a lower housing demand growth rate of 1.5 per annum. This is driven by the assumption that the share of housing growth in the Huon Valley LGA allocated to Cygnet SA2 remains constant throughout the years. Separate houses remain the most dominant housing type, whereas semi-detached dwellings have the highest growth rate. A total of 525 new dwellings are projected to be the size of housing demand by 2036.

TABLE 8: DWELLING DEMAND FORECAST 2020 TO 2036 (MODERATE GROWTH), CYGNET SA2

Dwelling type	2020	2021	2026	2031	2036	2020 to 2036 Growth	AAGR 2020 to 2036
Separate house	1,842	1,878	2,039	2,191	2,328	486	1.5%
Semi Detached	25	27	31	36	41	15	2.9%
Flat, unit or apartment	27	27	30	33	36	9	1.9%
Other	40	41	46	51	55	15	2.0%
<b>Total</b>	<b>1,934</b>	<b>1,973</b>	<b>2,146</b>	<b>2,311</b>	<b>2,459</b>	<b>525</b>	<b>1.5%</b>

Source: SGS Housing Demand Model (2020)

The differences between the two scenarios are largely driven by the demand in separate houses. Among the 204 dwelling growth difference between the high and moderate scenarios, separate houses account for 94 per cent (192 dwellings) of the total difference.

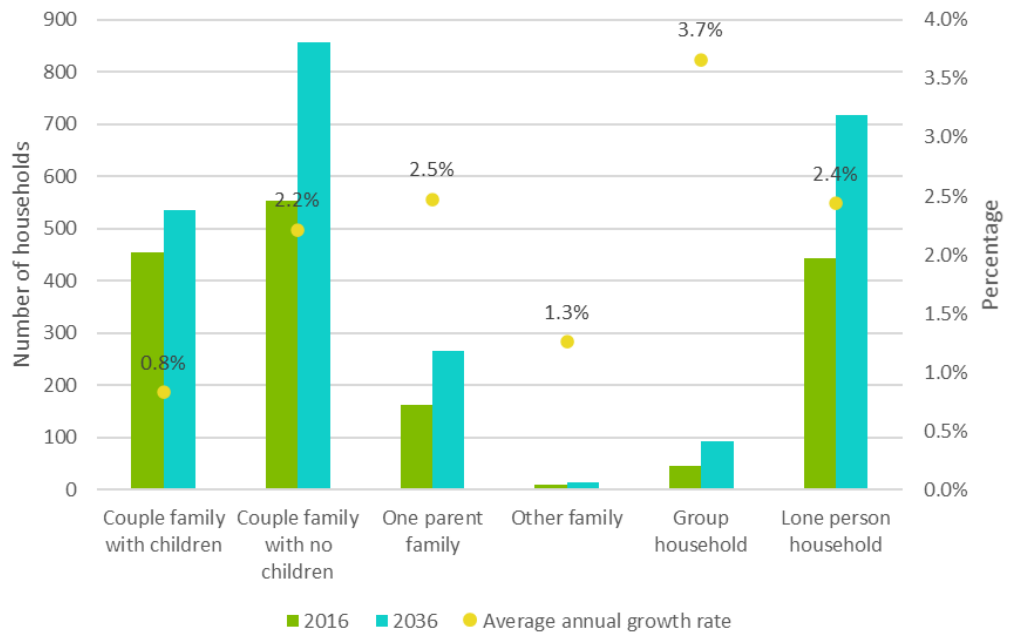
### Forecast household composition

The age statistics are reflected in the projected growth of different household types in the LGA. Under the high growth scenario (Figure 8), while couple families with children are anticipated to grow by 18 per cent between 2016 and 2036, couple families with no children, one parent family, and lone person household types are expected to grow considerably, by 55, 63, and 62 per cent respectively.

<sup>4</sup> The figure for 2020 is calculated by assuming that 80% of the growth between 2016 and 2021 (3 years' worth) has already been realised.

<sup>5</sup> AAGR – Average Annual Growth Rate

FIGURE 8: HOUSEHOLDS BY COMPOSITION (HIGH GROWTH), CYGNET SA2

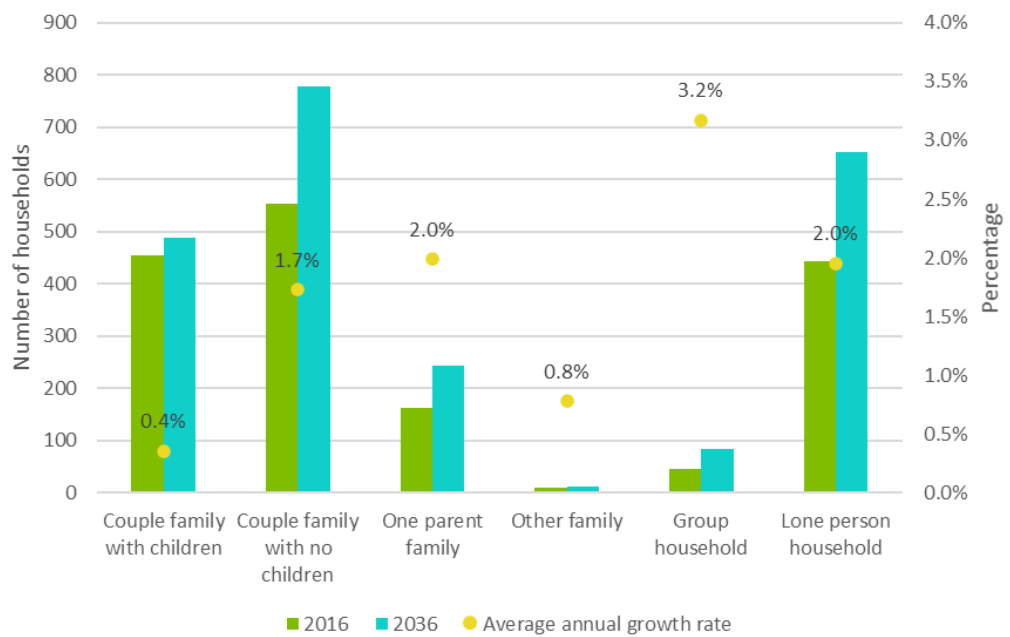


Source: Tasmanian Government 2019; SGS Housing Demand Model (2020)

Under the moderate growth scenario shown in Figure 9, couple families with children are only expected to grow by 7 per cent by 2036, while the biggest growths will also be seen in one parent families (48 per cent), lone person households (47 per cent), and couple families with no children (41 per cent).

Changes in household compositions in both scenarios are in line with trends seen across Tasmania and Australia, in that the average household size is to see a decrease overtime driven by ageing population. The ageing of the population in Tasmania is however more pronounced than Australia as a whole.

FIGURE 9: HOUSEHOLDS BY COMPOSITION (MODERATE GROWTH), CYGNET SA2



Source: Tasmanian Government 2019; SGS Housing Demand Model (2020)



# 3. HOUSING DEVELOPMENT CAPACITY

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## 3.1 Introduction and purpose

This chapter identifies available vacant residential land in Cygnet ready for development in the immediate, medium and longer-term. HVC has supplied much of the data required for the supply analysis, with SGS tasked with analysing this information and estimating the available lots within the UCL and UGB boundaries.

The purpose of the analysis is to reveal the capacity for new housing in Cygnet to 2036 and compare to housing demand to ascertain whether new parcels of land should be released. Key to meeting population demand as forecast will be to ensure land supply is consistent and stable, properly located and readily developable.

## 3.2 Housing capacity

### Method

To estimate the housing capacity of Cygnet (i.e. the likely number of dwellings that could be built in Cygnet to 2036), SGS relied upon the vacant land and lots analysis as identified by HVC. Each parcel was reviewed by SGS taking into account engineering advice provided by HVC to consider constraints to develop on each lot. This analysis included a lot of analysis conducted by Council compared to previous analysis completed by SGS on housing capacity in Cygnet.

Parcels of land were sorted into four different groups:

- Development ready lots (immediate supply)
- Land that is serviced with water and sewage, but not sub-divided (medium-term supply)
- Land that is serviceable but not sub-divided (medium to longer term supply)
- Land that is not sub-divided nor fully serviced (long term supply)
- Council-owned land (uncertain supply)

In addition, dwelling densities and realisation rates (what share of lots would realistically be developed) were allocated. The theoretical capacities of vacant residential land were estimated based on the following assumptions for two scenarios, low and high, with the higher scenario assuming greater densities<sup>6</sup>:

- Two different realisation rates are applied to development estimates. For the low capacity scenario, it is assumed that 50 per cent of the theoretical capacity will be realised. Many landowners will not sub-divide their land preferring to keep the whole parcel intact for their own use. There are also cost constraints if new access ways or infrastructure has to be provided and planning constraints such as the coastal overlay or other overlays on some sites. For the higher capacity scenario, it is assumed optimistically that 90 per cent of the capacity can be realised. This realisation rate was chosen given the accuracy and research behind the housing capacity data set supplied by HVC.
- Consideration has been given to dwelling densities in the General Residential zone in preparation of the vacant land and lots analysis as identified by HVC, with densities in

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<sup>6</sup> though compared to major cities the density in the high scenario remains low

that range of 9 dwellings per hectare (equivalent to 1,100 sqm per lot) to 15 dwellings per hectare (equivalent to 665 sqm per lot).

- For Huon Valley Council (HVC) owned land at 20 Golden Valley Road and 14 George Street, this land has been previously identified by Council for housing development as part of the George Street Site Development Strategy, and potentially therefore this land may be used, for example, as community housing and related services. As an indication for a use in the high scenario, it is assumed the capacity of 14 George St is 49 dwellings based on prior research by Terroir. For the low scenario, it is assumed that this land is not used for housing.

### Housing development capacity in Cygnet urban growth area

Table 9 below shows the results of the above analysis for Cygnet within the urban growth boundary. It shows that in the low scenario, with a realisation rate of 50%, there is future capacity for 92 new dwellings in Cygnet.

With a higher realisation rate (90 per cent) and the use of council land for medium density housing (such as a retirement village), the capacity in Cygnet is for 209 new dwellings. These scenarios can be thought of as a range, with the likely capacity falling somewhere in between, and likely towards the bottom of the range.

TABLE 9: HOUSING CAPACITY IN CYGNET URBAN GROWTH BOUNDARY

Land Type	Dwelling capacity (Low)	Dwelling capacity (Higher)	Dwelling capacity (Higher) with council land
Development ready (Short term)	16	28	28
Fully serviced but not sub-divided (Medium term)	50	89	89
Serviceable but not sub divided (Medium to longer term)	21	37	37
Not sub-divided or fully serviced (Long term)	6	11	11
Council-owned land (Uncertain)	0	0	44
<b>Total</b>	<b>92</b>	<b>165</b>	<b>209</b>

Note: the 44 Council-owned lots refer to those 49 lots at 14 George St identified by Terroir, with a 90% realisation rate applied

Allocating the above capacity to five-year time blocks results in the dwelling capacities below in Table 10:

- In the short term (to 2021) there is an immediate capacity for 16 to 28 new dwellings, depending on the capacity scenario, on development-ready lots in Cygnet.
- In the medium term when fully serviced but not sub-divided land is likely available for development, there is a capacity for around 50 to 89 dwellings between 2022 to 2026.
- In the medium to longer term when serviceable but not sub-divided land is likely available for development, there is a capacity for around 21 to 37 dwellings between 2027 to 2031.
- In the longer-term, when more difficult land for development may be ready for release, there is a capacity for a further 6 to 11 dwellings.

If the Council land is included and developed over the medium term, the capacity increases to 111 dwellings for 2022-2026 and 59 dwellings in 2027-2031.

TABLE 10: DWELLING CAPACITY IN 5-YEAR INTERVALS, URBAN GROWTH BOUNDARY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Dwelling capacity (Low)	16	50	21	6	92
Dwelling capacity (Higher)	28	89	37	11	165
Dwelling capacity (Higher) with council land	28	111	59	11	209

As a general rule of thumb, there needs to be approximately 15 years of vacant supply of land available to prevent speculative land behaviour and upward pressure on land and housing affordability.

### Housing development capacity in Cygnet urban centre locality

Table 11 below shows the results of the above analysis for Cygnet within the urban centre locality. It shows that in the low scenario there is currently capacity for 91 new dwellings in Cygnet.

With a higher realisation rate (90 per cent) and the use of council land for medium density housing (such as a retirement village), the capacity in Cygnet is for 207 new dwellings. These scenarios can be thought of as a range, with the likely capacity falling somewhere in between, and likely towards the bottom of the range.

TABLE 11: HOUSING CAPACITY IN CYGNET URBAN CENTRE LOCALITY

Land Type	Dwelling capacity (Low)	Dwelling capacity (Higher)	Dwelling capacity (Higher) with council land
Development ready (Short term)	11	19	19
Fully serviced but not sub-divided (Medium term)	51	91	91
Serviceable but not sub divided (Medium to longer term)	24	42	42
Not sub-divided or fully serviced (Long term)	6	11	11
Council-owned land (Uncertain)	0	0	44
<b>Total</b>	<b>91</b>	<b>163</b>	<b>207</b>

Note: the 44 Council-owned lots refer to those 49 lots at 14 George St identified by Terroir, with a 90% realisation rate applied

Allocating the above capacity to five-year time blocks results in the dwelling capacities below in Table 12:

- In the short term (to 2021) there is an immediate capacity for 11 to 19 new dwellings, depending on the capacity scenario, on development-ready lots in Cygnet.
- In the medium term when fully serviced but not sub-divided land is likely available for development, there is a capacity for around 51 to 91 dwellings between 2022 and 2026.
- In the medium to longer term when serviceable but not sub-divided land is likely available for development, there is a capacity for around 24 to 42 dwellings between 2027 to 2031.
- In the longer-term, when more difficult land for development may be ready for release, there is a capacity for a further 6 to 11 dwellings.

If the Council land is included and developed over the medium term, the capacity increases to 113 dwellings for 2022-2026 and 64 dwellings in 2027-2031.

TABLE 12: DWELLING CAPACITY IN 5-YEAR INTERVALS, URBAN CENTRE LOCALITY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Dwelling capacity (Low)	11	51	24	6	91
Dwelling capacity (Higher)	19	91	42	11	163
Dwelling capacity (Higher) with council land	19	113	64	11	207

As a general rule of thumb, there needs to be approximately 15 years of vacant supply of land available to prevent speculative land behaviour and upward pressure on land and housing affordability.

### Comparison to housing demand

As revealed in Section 2, the demand for housing in the Cygnet area (SA2) has been high in recent years. This is forecast to continue. Table 13 and Table 15 show the dwelling demand in the Cygnet SA2 and within the Cygnet growth boundary. It is assumed by SGS that 80 per cent of growth in the Cygnet area should be captured within the growth boundary to improve town vibrancy and economic outcomes for Cygnet (as explored in chapter 4). Additional growth in agricultural areas and shack communities is discouraged by the Huon Valley Land Use and Development Strategy and the Southern Tasmania Regional Land Use Strategy. At present only around a third of dwelling growth in the Cygnet area is being captured within the growth boundary (see Table 17 later).

### Housing capacity shortfall within the Cygnet UGB

Table 13 shows the gap between the future capacity scenarios. The results show that:

- In the low capacity scenario (the most likely scenario) there is insufficient capacity in Cygnet to cater for demand in the short, medium and long term.
- In the unlikely higher capacity scenario as well, demand is insufficient in the short, medium, and long term.
- When housing development on the HVC land is included there is still insufficient capacity over the next 16 years as well. There is a smaller deficit of supply in the medium term, which is not adequate for demand also due to the lack of choice and affordability this tight supply would create. This minor excess capacity in this scenario also relies on council foregoing broader community uses of prime council-owned land in the middle of Cygnet.

TABLE 13: DETACHED DWELLING DEMAND IN 5-YEAR INTERVALS COMPARED TO DWELLING CAPACITY, URBAN GROWTH BOUNDARY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Demand in Cygnet SA2	39	173	164	148	524
Dwelling demand in growth boundary	31	139	131	118	419
Supply gap: Low capacity scenario	-15	-89	-111	-112	-328
Supply gap: Higher capacity scenario	-3	-50	-95	-107	-255
Supply gap: Higher scenario with Council land	-3	-28	-73	-107	-210

\*Assumes 60% of the demand for 2016 to 2021 has already been realised

The analysis in Table 14 shows that in the short term, between 50 to 91% of dwelling demand in the Cygnet growth boundary can be catered for within the UGB, with 36 to 64% in the next 5 years, 16 to 28% between 2027 and 2031, and only 5 to 9% in 2032 to 2036. In total, only 22 to 39% of dwelling demand is accommodated within the UGB, not including council owned land, and if supply is not increased, this demand would likely go into rural land and/or elsewhere. Even with the high realisation rate of 90% there is still going to be a shortfall in supply.

TABLE 14: PROPORTION OF DETACHED DWELLING DEMAND IN CYGNET SA2 IN 5-YEAR INTERVALS COVERED BY DWELLING CAPACITY, URBAN GROWTH BOUNDARY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Supply gap: Low capacity scenario	50%	36%	16%	5%	22%
Supply gap: Higher capacity scenario	91%	64%	28%	9%	39%
Supply gap: Higher scenario with Council land	91%	80%	45%	9%	50%

\*Assumes 60% of the demand for 2016 to 2021 has already been realised

### Housing capacity shortfall in the Cygnet UCL

A similar result is observed for the Cygnet urban centre locality, as shown in the gap analysis in Table 15. A larger deficit is shown in the next year when compared to the UGB, and a smaller deficit in supply in the medium term.

TABLE 15: DETACHED DWELLING DEMAND IN 5-YEAR INTERVALS COMPARED TO DWELLING CAPACITY, URBAN CENTRE LOCALITY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Demand in Cygnet SA2	39	173	164	148	524
Dwelling demand in growth boundary	31	139	131	118	419
Supply gap: Low capacity scenario	-20	-88	-108	-112	-328
Supply gap: Higher capacity scenario	-12	-48	-89	-107	-256
Supply gap: Higher scenario with Council land	-12	-26	-67	-107	-212

\*Assumes 60% of the demand for 2016 to 2021 has already been realised

The analysis in Table 16 shows that in the short term, only 34 to 61% of dwelling demand in the Cygnet growth boundary can be catered for within the UCL, with 36 to 66% in the next 5 years, 18 to 32% between 2027 and 2031, and only 5 to 10% in 2032 to 2036. In total, only 22 to 39% of dwelling demand is accommodated within the UCL, not including Council owned land, and if supply is not increased, this demand would likely go into rural land and/or elsewhere. Even with the high realisation rate of 90% there is still going to be a shortfall in supply.

TABLE 16: PROPORTION OF DETACHED DWELLING DEMAND IN CYGNET SA2 IN 5-YEAR INTERVALS COVERED BY DWELLING CAPACITY, URBAN CENTRE LOCALITY

	2020-2021*	2022-2026	2027-2031	2032-2036	Total
Supply gap: Low capacity scenario	34%	36%	18%	5%	22%
Supply gap: Higher capacity scenario	61%	66%	32%	10%	39%
Supply gap: Higher scenario with Council land	61%	81%	49%	10%	49%

\*Assumes 60% of the demand for 2016 to 2021 has already been realised

### 3.3 Conclusions

The lack of supply of land ready for housing development presents challenges to new residents looking to move to Cygnet. These new residents may choose to not move to Cygnet or may move outside of the growth boundary. Demand will not be met under the existing supply.

SGS are aware of a property that is undergoing an application for a Section 43A rezoning and subdivision approval – this property is currently not residentially zoned. This property is within the UCL boundary and partly within the UGB boundary. If the rezoning and subdivision applications are successful there is potential for a further 61 lots available in the medium term.

The ageing of the population also requires careful consideration. The early release of new residential lots can help attract families to Cygnet reducing the ageing of the population while land in the centre of Cygnet may be dedicated to retirement living instead of detached housing.

In the current market, land values may become prohibitive for households to move into Cygnet. It is very likely that demand is currently diverted to areas outside the UGB, and into other parts of the Huon Valley or adjacent LGAs.

## 4. COMMENTARY

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### STRLUS and demand for housing since 2011

In STRLUS, Cygnet is defined as a township with a moderate growth strategy according to a mixed growth scenario from 2011 to 2035. A township is defined as residential settlement with prominent town centres providing a number of facilities, some local employment opportunities and convenience shopping. They tend to have a population of 500 to 1,500 residents, excluding the surrounding rural living areas.

The moderate growth strategy in STRLUS refers to an anticipated growth of 10 to 20 per cent of dwellings. A mixed growth scenario indicates that residential growth should come from a mix of both greenfield and infill circumstances and that expansion of the residential zone may be required dependent upon an assessment of the yield capacity and vacancy of existing zoned land.

In addition, the Strategy promotes consolidation of existing settlements and minimisation of urban sprawl and lower density development (p. 85).

The demand projections in STRLUS were primarily based on historic growth, primarily based on Census publications of which the most recent, published one would have been 2006. Since 2011, population growth and related dwelling demand has outpaced anticipated growth as detailed in STRLUS.

In addition, population growth has outpaced the population projections by Treasury by LGA. The issue with the Treasury projections is they do not account for intrastate migration between LGAs and/or growth patterns based on planning decisions. We therefore see in several LGAs, especially those with relative affordable house prices and within a (somewhat) commutable distance from Hobart, that population projections have been below actual growth rates.

In order to achieve the overarching strategic planning objectives of urban consolidation, prevention of sprawl and fragmentation of agricultural land, it is of the utmost importance to ensure sufficient and suitable vacant residential land is provided for in and around existing settlements (within their UGB).

There is an urgent need to update STRLUS to reflect updated projections and ensure the overarching strategic planning objectives are achieved. There is also a need to update the Treasury population projections to appropriately account of intrastate migration patterns.

### Acute shortfall of supply within the township

The analysis shows there is an acute shortage of suitable, vacant residential land to accommodate future growth, while meeting the overarching planning objectives.

The following observations support the key finding of the analysis. At the time of writing this report there was no vacant residential land for sale in Cygnet. At the same time, we see that housing affordability has been decreasing (see paragraph below).

In addition, a significant share of residential demand has been accommodated outside of the UCL and UGB of Cygnet, as is illustrated in the table below. The table was compiled from ABS Census data. It shows that the majority of the dwelling stock increase was accommodated in the area outside of the UCL and the UGB<sup>7</sup>. This suggests limited availability of suitable and

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<sup>7</sup> It also shows that the majority of the existing dwelling stock is outside of the UGB and UCL, reflecting the rural historic character of the town.

affordable land within the township. Of course, many households in the area also choose to live in rural and environmental lifestyle settings. The dwelling growth rate within the UCL and UGB was 3.7% and 2.1% respectively, well above the growth rate for the SA2, reflecting a high demand for living in the town.

TABLE 17 NUMBER OF PRIVATE DWELLINGS, CYGNET

	2011	2016	Growth	AAGR	Share of growth	Share of stock (2016)
<b>Cygnnet SA2</b>	1,988	2,135	147	1.8%	100%	100%
<b>Cygnnet UCL</b>	323	373	50	3.7%	34%	17%
<b>Cygnnet remainder (UCL)</b>	1,665	1,762	97	1.4%	66%	83%
<b>Cygnnet UGB</b>	399	433	34	2.1%	23%	20%
<b>Cygnnet remainder (UGB)</b>	1,589	1,702	113	1.7%	77%	80%

Source: ABS Census, 2011 and 2016

### Housing affordability and choice

High rents, relative to household incomes, has seen Greater Hobart become the least affordable metropolitan area in Australia for renting. Many homes have also been converted to short-term holiday rentals. Many households are looking to the Huon Valley for more affordable housing options. According to the rental affordability index<sup>8</sup>, Cygnnet has an acceptable level of affordability, but this will be impacted over time if there is a shortage of housing in comparison to demand as identified by SGS in the proceeding chapter. Rental affordability provides the best insight into the relation of residential demand and supply, as its affordability level is not distorted by property speculation and wealth creation considerations.

Already, rental affordability for the average income rental household has dropped markedly in Cygnnet from being 'very affordable' in the fourth quarter of 2013, to 'acceptable' by the second quarter in 2019. For some household types, rents have already become unaffordable, where households pay more than thirty per cent of their income in rent. This leaves them with insufficient funds to pay for other primary needs such as heating, medical needs, education and transport.

### COVID-19 and public health restrictions

The impacts of the pandemic are still evolving and uncertain. However, it is clear there are substantial consequences in terms of economic growth, migration and tourism.

At the time of writing this report, Tasmania is successfully pursuing a strategy of elimination of COVID-19. Travel across State borders is restricted to essential travellers and people who accept to stay in hotel quarantine for two weeks. This has resulted a drop of visitors to the island. With uncertainty about the future availability of a vaccine, restrictions may stay in place for another year or more.

Economic modelling shows unemployment levels may not fall to pre-pandemic levels for another three to four years.

Both lower migration and high unemployment may undermine demand for residential land, although that is not visible in the market yet, partially due to housing investment subsidies.

All in all, the pandemic may delay residential demand by two to three years.

<sup>8</sup> <https://www.sgsep.com.au/projects/rental-affordability-index>



## 5. FINDINGS AND RECOMMENDATION

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The capacity analysis indicates that currently there is the capacity to provide another 92 to 165 new dwellings in the Cygnet urban growth boundary to 2036, and 91 to 163 new dwellings in the Cygnet urban centre locality depending on dwelling density and realisation rates. If HVC land in the George Street redevelopment area is developed, the high capacity scenario increases to 209 and 207 dwellings for the UGB and UCL respectively. The actual capacity likely lies somewhere towards to bottom of this range, with the higher scenario unlikely to be realised.

Demand for housing in Cygnet is strong. To 2036 it is estimated that there will be demand for another 524 dwellings in the Cygnet area from 2020. Assuming that 80 per cent of the dwellings should be located within the urban growth boundary to protect agricultural land from fragmentation and to develop greater economic and social vibrancy in the town, then 419 dwellings will be demanded within the growth boundary.

As it currently stands, there is insufficient land available to achieve a dwelling capacity that will meet the projected demand within the urban growth boundary. The insufficient supply means that potential new residents cannot move to Cygnet due to insufficient choice and affordability pressures.



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## Submission to Planning Authority Notice

<b>Council Planning Permit No.</b>	RZ 2021/002	<b>Council notice date</b>	26/04/2021
<b>TasWater details</b>			
<b>TasWater Reference No.</b>	TWDA 2021/00640-BTN	<b>Date of response</b>	05/05/2021
<b>TasWater Contact</b>	Phil Papps	<b>Phone No.</b>	0474 931 272
<b>Response issued to</b>			
<b>Council name</b>	BRIGHTON COUNCIL		
<b>Contact details</b>	development@brighton.tas.gov.au		
<b>Development details</b>			
<b>Address</b>	1 ELDERSLIE RD, BRIGHTON	<b>Property ID (PID)</b>	9120867
<b>Description of development</b>	Planning Scheme Amendment		
<b>Schedule of drawings/documents</b>			
<b>Prepared by</b>	<b>Drawing/document No.</b>	<b>Revision No.</b>	<b>Date of Issue</b>
Era Planning & Environment	Planning Submission / 2021-045	--	19/02/2021
<b>Conditions</b>			
Pursuant to the <i>Water and Sewerage Industry Act 2008 (TAS)</i> Section 56S(2) TasWater makes the following submission:			
1. TasWater does not object and has no formal comments for the Tasmanian Planning Commission in relation to this matter and does not require to be notified of nor attend any subsequent hearings.			
<b>Advice</b>			
<b>General</b>			
For information on TasWater development standards, please visit <a href="http://www.taswater.com.au/Development/Development-Standards">http://www.taswater.com.au/Development/Development-Standards</a>			
For application forms please visit <a href="http://www.taswater.com.au/Development/Forms">http://www.taswater.com.au/Development/Forms</a>			
<b>Declaration</b>			
The drawings/documents and conditions stated above constitute TasWater's Submission to Planning Authority Notice.			
<b>Authorised by</b>			
			
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