bull + bear economics

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Statutory Review of the Bundaberg Planning Scheme – Economic Inputs

Mewing Planning Consultants

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1 Introduction

1.1 Purpose of Study

Bull & Bear Economics was engaged by Bundaberg Regional Council in partnership with Mewing Planning Consultants and Morgan Wilson Planning Consultant to undertake a statutory review of the Bundaberg Planning Scheme. Our role in the project was to consider at a high level the potential population, dwelling and employment outlook for the region, based on review of recent growth trends and a continuation of these trends to 2036. This outlook was compared to the latest LGIP Planning Assumptions report (Version 6.1, effective 12 May 2023), recognising whilst the LGIP informs infrastructure and service delivery, the planning assumptions are the latest projections of future dwelling and employment growth prepared locally. This report is not intended to suggest or identify a preferred outlook or alternative data for use within the LGIP, rather it is intended to analyse and illustrate how the population, dwelling and employment outlook may evolve should current growth trends continue to 2036.

The outcomes of this assessment were utilised to understand the potential implications for the planning scheme review, including whether further studies are warranted as part of the planning scheme review process.

1.2 Report Structure

This report is structured as follows:

+ **Section 1 Introduction:** This section provides an overview of the purpose of the study and outlines the report structure;
+ **Section 2 Population, Dwelling and Employment Outlook:** This section considers observed data for Bundaberg and its component communities to inform a high level assessment of the population, dwelling and employment outlook, based on a continuation of recent trends. This section also provides high level estimates of indicative land requirements (on 2021 levels) based on a continuation of recent trends; and
+ **Section 3 Implications for Planning Scheme Review:** This section provides a summary of the peer review outcomes and provides insights into how this analysis informs potential planning scheme amendments and whether further studies are warranted based on the outcomes of the assessment.

2 Population, Dwelling and Employment Outlook

The purpose of this chapter is to consider the potential population, dwelling and employment outlook for Bundaberg Regional Council and its component communities, based on a continuation of recent trends.

This independent review compares the population, dwelling and employment projections in the LGIP planning assumptions report against published data sources, such as:

+ Queensland Government Statistician's Office (QGSO) population projections by LGA and SA2 – 2018 and 2023 series;
+ Queensland Government Statistician's Office (QGSO) dwelling projections by LGA and SA2 – 2023 series;
+ Estimated resident population estimates (available at the SA1, SA2 and LGA level);
+ Data published in the 2011, 2016 and 2021 Censuses (population, dwellings and employment); and
+ Queensland Treasury employment projections by SA4.

The outcome of this independent review is an understanding of how the outlook for the Bundaberg region and its component communities has likely shifted since the drafting of the Bundaberg Planning Scheme in 2015.

2.1 Boundary Concordance

To undertake the independent review of the population, dwelling and employment outlook at a small area level, consideration was given to the geographic boundaries as defined under the Bundaberg Regional Council LGIP. The Bundaberg Regional Council LGIP presents population, dwelling and employment projections for nine communities within the priority infrastructure area (PIA), outside the PIA and Bundaberg Regional Council as a whole. The nine community boundaries do not neatly align with SA2 boundaries, for which a broad range of non-Census data is available.

The data utilised throughout this assessment uses varying geographic boundaries, with not all observed data available at the SA1 level. As such, the relevant geographic boundaries have been concorded to the small areas identified within the priority infrastructure area (PIA) of Bundaberg Regional Council. Notably, Greater Bundaberg is the only projection area comprising multiple SA2s.

Table 2-1 summarises the concordance of LGIP projection areas to Statistical Area Level 2 (SA2) and SA1 boundaries.

Table 2-1 Concordance of LGIP Projection Areas to SA2 and SA1 Boundaries

Community	SA2	SA1	
Greater Bundaberg	Ashfield - Kepnock	31901149203	31901149202
		31901149204	31901149212
		31901149205	31901149208
		31901149209	31901149210
		31901149211	31901149206
		31901149201	
	Branyan - Kensington	31901149407	31901149409
		31901149405	
	Bundaberg	31901149505	31901149513
		31901149502	31901149514
		31901149507	31901149517
		31901149506	31901149515
		31901149501	31901149516
		31901149508	31901149512
		31901149509	31901149511
		31901149504	31901149510
		31901149503	
	Bundaberg East - Kalkie	31901149613	31901149616
		31901149607	31901149604
		31901149612	31901149605
		31901149611	31901149603
		31901149610	31901149606
		31901149608	31901149615
		31901149609	
		31901149614	
	Bundaberg North - Gooburrum	31901149721	31901149722
		31901149711	31901149704
		31901149712	31901149709
		31901149710	31901149703
		31901149706	31901149708
		31901149707	31901149702
		31901149705	31901149701
	Millbank - Avoca	31901150002	31901150006
		31901150021	31901150007
		31901150013	31901150017
		31901150015	31901150004
		31901150014	31901150019
		31901150001	31901150018
		31901150012	31901150005
		31901150011	31901150010
		31901150003	31901150009
		31901150016	31901150008
		31901150022	
	Svensson Heights - Norville	31901150113	31901150105
		31901150112	31901150101
		31901150110	31901150102
		31901150111	31901150103

Community	SA2	SA1
		▪ 31901150114 ▪ 31901150104 ▪ 31901150108 ▪ 31901150107 ▪ 31901150109 ▪ 31901150106 ▪ 31901150115
	Walkervale - Avenell Heights	▪ 31901150213 ▪ 31901150201 ▪ 31901150227 ▪ 31901150202 ▪ 31901150212 ▪ 31901150217 ▪ 31901150210 ▪ 31901150216 ▪ 31901150223 ▪ 31901150215 ▪ 31901150224 ▪ 31901150214 ▪ 31901150225 ▪ 31901150218 ▪ 31901150226 ▪ 31901150220 ▪ 31901150205 ▪ 31901150204 ▪ 31901150221 ▪ 31901150208 ▪ 31901150222 ▪ 31901150209 ▪ 31901150211 ▪ 31901150207 ▪ 31901150219 ▪ 31901150206 ▪ 31901150203
Bargara	Bargara - Burnett Heads	▪ 31901149324 ▪ 31901149326 ▪ 31901149325 ▪ 31901149334 ▪ 31901149323 ▪ 31901149301 ▪ 31901149321 ▪ 31901149329 ▪ 31901149335 ▪ 31901149327 ▪ 31901149336 ▪ 31901149330 ▪ 31901149331 ▪ 31901149302
Burnett Heads	Bargara - Burnett Heads	▪ 31901149319 ▪ 31901149316 ▪ 31901149318 ▪ 31901149315 ▪ 31901149317 ▪ 31901149320
Elliott Heads	Bargara - Burnett Heads	▪ 31901149311 ▪ 31901149313 ▪ 31901149312
Innes Park/Coral Cove	Bargara - Burnett Heads	▪ 31901149307 ▪ 31901149309 ▪ 31901149308 ▪ 31901149310
Moore Park	Bundaberg Surrounds - North	▪ 31901149823 ▪ 31901149804 ▪ 31901149824 ▪ 31901149803 ▪ 31901149805
Childers	Bundaberg Surrounds - South	▪ 31901149925 ▪ 31901149908 ▪ 31901149926 ▪ 31901149927 ▪ 31901149924
		▪ 31901149921
Woodgate	Bundaberg Surrounds - South	▪ 31901149913 ▪ 31901149915 ▪ 31901149914
Gin Gin	Gin Gin	▪ 31902150408 ▪ 31902150407
		▪ 31902150404

2.2 Population Trends

This section provides an overview of the following characteristics in understanding the growth outlook for Bundaberg Regional Council and its component communities (as defined in the LGIP):

+ Understanding of the observed distribution of population growth by community (as informed by estimated resident population data published annually by SA1 and SA2 by the Australian Bureau of Statistics);
+ Components of population growth by SA2: This section is provided to understand the drivers of population growth within Bundaberg Regional Council and its communities and to determine if this has shifted significantly since the COVID-19 pandemic as this can potentially impact the population outlook;
+ Alignment of 2021 population estimates by community to the LGIP; and
+ Alignment of QGSO population outlook to LGIP estimates.

2.2.1 Observed Population

Observed population data is available by SA1 and SA2 for Bundaberg Regional Council. For completeness, the assessment has presented both datasets, recognising that the components of population data is available only at the SA2 level and above. The communities within the PIA are dispersed across each of the SA2s within Bundaberg Regional Council except for North Burnett SA2; however, the majority of the SA2s extend beyond the projection areas of the PIA.

Over the past ten years, the following trends are apparent:

+ The Bundaberg Regional Council population has increased by 8,339 persons between 2013 and 2022 at an average rate of 1.0% per annum;
+ Approximately two thirds of population growth over this period occurred within the PIA, with the remaining quarter of growth occurring outside the PIA;
+ Prior to 2016, there was limited population growth, however since 2016, the population has increased by 7,933 persons at an average rate of 1.4% per annum. This represents ~95% of total population growth between 2013 and 2022;
+ Over the 2016 to 2022 period, ~45% of population growth occurred within the Greater Bundaberg and Bargara (increase of 1,947 persons and 1,632 persons); and
+ At an SA2 level, approximately two thirds of population growth between 2016 and 2022 occurred in the SA2s of Bargara – Burnett Heads (increase of 3,023 persons), Bundaberg Surrounds – South (increase of 1,352 persons) and Branyan – Kensington (increase of 849 persons).

Table 2-2 summarises observed population growth within each community in the PIA between 2013 and 2022, while Table 2-3 provides observed population growth across Bundaberg Regional Council by SA2 for the same period. The SA2s which concord with the Greater Bundaberg LGIP projection area have been grouped in Table 2-3.

Table 2-2 Observed Population within PIA by Community – Bundaberg Regional Council, 2013 to 2022

Community	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2013-22		2016-22	
											Change	Ave. Ann. Growth	Change	Ave. Ann. Growth
Greater Bundaberg	47,871	47,699	47,492	47,425	47,801	48,187	48,497	48,710	48,843	49,372	1,501	0.3%	1,947	0.7%
Bargara	7,457	7,489	7,538	7,623	7,842	8,123	8,417	8,687	8,993	9,255	1,798	2.4%	1,632	3.3%
Burnett Heads	2,719	2,745	2,728	2,711	2,737	2,803	2,869	2,867	2,949	3,058	339	1.3%	347	2.0%
Elliott Heads	824	837	846	860	867	873	901	893	925	989	165	2.0%	129	2.4%
Innes Park/Coral Cove	2,075	2,099	2,164	2,216	2,265	2,334	2,451	2,519	2,598	2,632	557	2.7%	416	2.9%
Moore Park	1,928	2,002	2,052	2,155	2,203	2,263	2,312	2,322	2,317	2,332	404	2.1%	177	1.3%
Childers	1,681	1,636	1,573	1,552	1,568	1,579	1,604	1,624	1,647	1,732	51	0.3%	180	1.8%
Woodgate	999	1,022	1,049	1,086	1,136	1,184	1,233	1,298	1,369	1,417	418	4.0%	331	4.5%
Gin Gin	1,260	1,264	1,248	1,239	1,244	1,236	1,240	1,253	1,258	1,283	23	0.2%	44	0.6%
Inside PIA	**66,814**	**66,793**	**66,690**	**66,867**	**67,663**	**68,582**	**69,524**	**70,173**	**70,899**	**72,070**	**5,256**	**0.8%**	**5,203**	**1.3%**
Outside PIA	**27,036**	**27,232**	**27,338**	**27,389**	**27,727**	**28,087**	**28,382**	**28,880**	**29,219**	**30,119**	**3,083**	**1.2%**	**2,730**	**1.6%**
Bundaberg Regional Council	**93,850**	**94,025**	**94,028**	**94,256**	**95,390**	**96,669**	**97,906**	**99,053**	**100,118**	**102,189**	**8,339**	**1.0%**	**7,933**	**1.4%**

Source: ABS ERP estimates by SA1 (2023)

Table 2-3 Observed Population by SA2 – Bundaberg Regional Council, 2013 to 2022

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2013-22		2016-22	
											Change	Ave. Ann. Growth	Change	Ave. Ann. Growth
Greater Bundaberg	53,677	53,573	53,369	53,267	53,717	54,228	54,592	54,919	55,168	55,861	2,184	0.4%	2,594	0.8%
Ashfield - Kepnock	5,215	5,289	5,320	5,332	5,428	5,524	5,613	5,632	5,698	5,790	575	1.2%	458	1.4%
Branyan - Kensington	4,406	4,515	4,627	4,758	4,896	5,029	5,175	5,327	5,421	5,607	1,201	2.7%	849	2.8%
Bundaberg	6,389	6,327	6,294	6,250	6,337	6,390	6,342	6,404	6,309	6,315	-74	-0.1%	65	0.2%
Bundaberg East - Kalkie	5,471	5,514	5,524	5,564	5,616	5,668	5,750	5,764	5,848	5,910	439	0.9%	346	1.0%
Bundaberg North - Gooburrum	7,431	7,393	7,351	7,303	7,315	7,352	7,346	7,423	7,497	7,625	194	0.3%	322	0.7%
Millbank - Avoca	7,799	7,711	7,605	7,493	7,414	7,397	7,406	7,384	7,452	7,545	-254	-0.4%	52	0.1%
Svensson Heights - Norville	5,872	5,828	5,769	5,701	5,681	5,728	5,798	5,870	5,856	5,932	60	0.1%	231	0.7%
Walkervale - Avenell Heights	11,094	10,996	10,879	10,866	11,030	11,140	11,162	11,115	11,087	11,137	43	0.0%	271	0.4%
Bargara - Burnett Heads	16,489	16,648	16,787	16,912	17,302	17,762	18,319	18,710	19,245	19,935	3,446	2.1%	3,023	2.8%
Bundaberg Surrounds - North	8,600	8,751	8,861	8,972	9,061	9,151	9,269	9,327	9,360	9,459	859	1.1%	487	0.9%
Bundaberg Surrounds - South	9,817	9,786	9,784	9,921	10,033	10,154	10,284	10,552	10,873	11,273	1,456	1.5%	1,352	2.2%
Gin Gin	5,260	5,259	5,219	5,176	5,232	5,294	5,326	5,363	5,436	5,535	275	0.6%	359	1.1%
North Burnett	7	8	8	8	9	10	11	12	13	13	6	7.1%	5	8.4%
Bundaberg Regional Council	**93,850**	**94,025**	**94,028**	**94,256**	**95,354**	**96,599**	**97,801**	**98,883**	**100,095**	**102,076**	**8,226**	**0.9%**	**7,820**	**1.3%**

Source: ABS ERP estimates by SA2 and LGA (2023)

2.2.2 Components of Population Growth

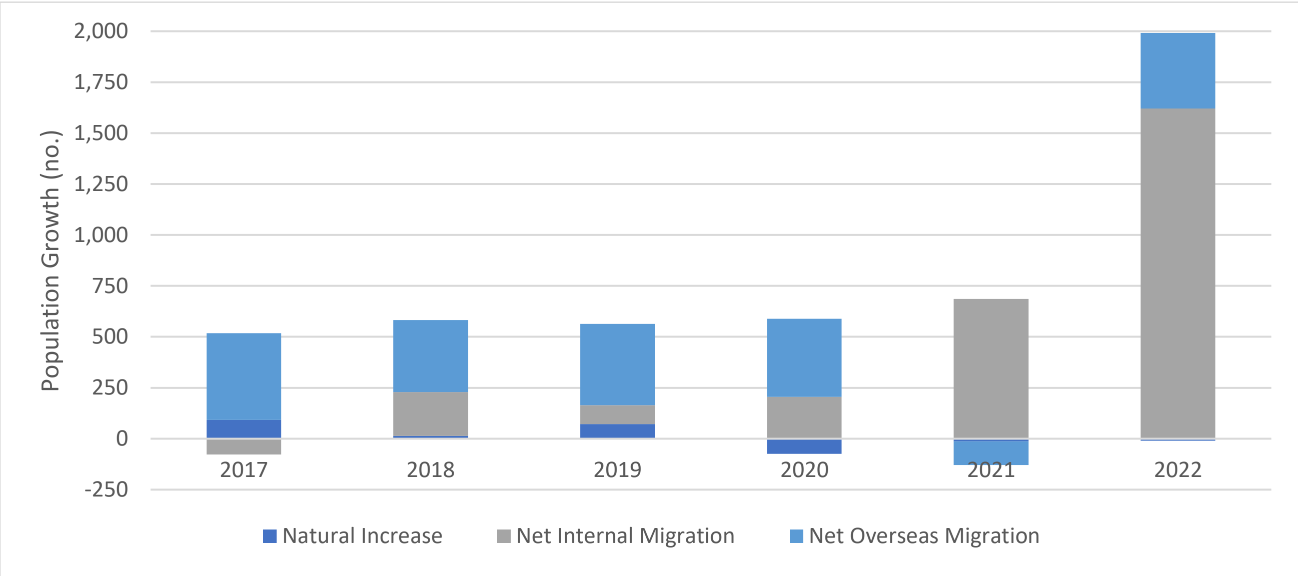
Since 2017, the Australian Bureau of Statistics (ABS) has published annual data on the drivers of population growth at the SA2 level and above. There are three components of population growth, namely:

+ Natural increase, i.e. births less deaths;
+ Net internal migration, i.e. persons moving to a region (in this case Bundaberg Regional Council and its component SA2s) from other parts of Australia less persons moving out of a region to other parts of Australia; and
+ Net overseas migration, i.e. persons who migrate to a region from overseas less persons who migrate overseas from a region.

Between 2017 and 2020, overseas migration was the primary driver of population growth across Bundaberg Regional Council. However, with the onset of the COVID-19 pandemic, population growth in 2021 and 2022 has been driven by net internal migration. Population growth in 2022 (increase of 1,981 persons) was significantly higher than the previous five years (average of ~531 additional persons between 2017 and 2021).

Figure 2-1 illustrates the components of population growth in Bundaberg Regional Council between 2017 and 2022.

Figure 2-1 Components of Population Growth – Bundaberg Regional Council, 2017 to 2022



Source: ABS (2023)

2.2.3 Projected Population

This section has compared the population outlook under the Bundaberg LGIP against QGSO projections prepared in 2018 (medium series) and 2023 (low, medium and high series) which are available at the SA2 level and above. Consideration has also been given to the projected population outlook under the latest LGIP, which considers the growth outlook both LGA wide and by community.

The intent of this exercise is to consider various published estimates on the growth outlook for Bundaberg Regional Council and its component communities, as opposed to suggesting a preferred growth outlook.

2.2.3.1 Bundaberg Regional Council

This section of the report considers the growth outlook in Bundaberg Regional Council based on the 2018 QGSO, 2023 QGSO and latest LGIP estimates, with the intent of understanding the shifts in the growth outlook region wide.

The 2018 QGSO projections were more optimistic on the growth outlook for Bundaberg Regional Council than the 2023 QGSO projections. Interestingly, the projections identify a slowdown in the rate of population growth within the region relative to the previous ten years (2013 to 2022), where growth averaged 1.0% per annum.

Section 2.2.1 of the report illustrated observed population growth within Bundaberg Regional Council varied significantly in the 2013 to 2022 period, as detailed below:

+ Low growth (2013-16): Average of 135 persons per annum;
+ High growth (2017-21): Average of 1,172 persons per annum; and
+ Highest growth (2021-22): Additional 2,071 persons.

Applying these alternative growth trajectories to 2022 estimated resident population estimates would translate to the following population outcomes in Bundaberg Regional Council by 2036:

+ Low growth: 104,084 persons by 2036;
+ High growth: 118,979 persons by 2036; and
+ Highest growth: 131,183 persons by 2036.

It is noted that the 2023 QGSO low series is more pessimistic than the low growth period (2013-16). On the other hand, the 2023 QGSO high series falls below the growth trajectories under the high growth and highest growth scenarios.

Table 2-4 details the medium series population projections for Bundaberg Regional Council as prepared by QGSO in 2018, the growth outlook as presented in the Bundaberg LGIP and the low, medium and high series population projections released in 2023.

Table 2-4 LGIP and QGSO Population Projections – Bundaberg Regional Council, 2021 to 2036

	2021	2026	2031	2036	Change, 2021-36	Ave. Ann. Growth, 2021-36
QGSO (2018)						
Medium series	100,281	105,982	110,814	115,365	15,085	0.7%
QGSO (2023)						
Low series	100,118	101,991	102,576	102,296	2,178	0.1%
Medium series	100,118	103,553	106,742	109,790	9,672	0.5%
High series	100,118	105,133	111,042	117,609	17,491	0.8%
Bundaberg LGIP	104,619	109,798	114,833	119,759	15,140	0.7%

Source: QGSO (2023)

2.2.3.2 Population Projections by Community

The Bundaberg LGIP anticipated the Bundaberg Regional Council population would increase from 104,619 persons to 119,759 persons over the 2021 to 2036 period. At ultimate development, the LGIP estimates Bundaberg Regional Council will have a total population of 182,126 persons.

Within the priority infrastructure area (PIA), the population is anticipated to increase from 75,749 persons in 2021 to 87,094 persons in 2036, with an ultimate capacity of 100,353 persons. Outside of the PIA, the population is anticipated to increase from 28,870 persons to 32,665 persons over the fifteen year period, with an ultimate development capacity of 81,773 persons.

Table 2-5 details the existing and projected population figures as indicated by the Bundaberg LGIP.

Table 2-5 Existing and Projected Population by Community – Bundaberg Regional Council, 2021 to 2036

Community	2021	2026	2031	2036	Ultimate Development (Capacity)
Greater Bundaberg	50,967	52,935	54,831	55,945	62,245
Bargara	10,237	11,115	12,127	12,895	15,215
Burnett Heads	2,970	3,133	3,332	3,499	4,170
Elliott Heads	1,397	1,672	1,812	1,927	2,223
Innes Park/Coral Cove	2,433	2,674	2,870	3,046	3,701
Moore Park	1,870	1,954	2,086	2,191	3,046
Childers	1,714	1,859	2,017	2,103	2,405
Woodgate	2,814	3,045	3,248	3,415	4,809
Gin Gin	1,348	1,637	1,898	2,073	2,539
Inside PIA	**75,749**	**80,023**	**84,220**	**87,094**	**100,353**
Outside PIA	**28,870**	**29,775**	**30,613**	**32,665**	**81,773**
Bundaberg Regional Council	**104,619**	**109,798**	**114,833**	**119,759**	**182,126**

Source: Bundaberg Regional Council LGIP (2015)

The communities of Greater Bundaberg, Elliott Heads, Childers and Gin Gin are anticipated to account for a greater share of population growth in comparison to the 2016 to 2022 period. In contrast, the remaining communities of Bargara, Burnett Heads, Innes Park/Coral Cove, Moore Park and Woodgate are anticipated to record a declining share of population growth. Notably, Greater Bundaberg's share of population growth is expected to increase to 32.9% while Bargara's share of population growth is anticipated to decline to 17.6%.

Table 2-6 below compares the observed and projected share of population growth by community.

We provide the following comment on the anticipated distribution of population growth under the latest LGIP relative to observed trends, to understand whether the outlook under the LGIP aligns with observed growth trends within the region.

+ The projections indicate Greater Bundaberg is anticipated to account for a higher share of population growth relative to observed trends;
+ The projections have allocated a significantly higher proportion of growth to Gin Gin relative to observed trends; and
+ The projections anticipate a declining reliance on growth in the coastal communities of Bargara, Burnett Heads and Innes Park / Coral Cove, with growth increasingly shifting towards Elliott Heads. Advice from Council has indicated capacity for growth remains in Elliott Heads, Coral Cove, Bargara and Burnett Heads.

Table 2-6 Observed and Projected Share of Population Growth by Community - Bundaberg Regional Council, 2013 to 2036

Community	2013-22	2016-22	2021-36
Greater Bundaberg	18.0%	24.5%	32.9%
Bargara	21.6%	20.6%	17.6%
Burnett Heads	4.1%	4.4%	3.5%
Elliott Heads	2.0%	1.6%	3.5%

Community	2013-22	2016-22	2021-36
Innes Park/Coral Cove	6.7%	5.2%	4.0%
Moore Park	4.8%	2.2%	2.1%
Childers	0.6%	2.3%	2.6%
Woodgate	5.0%	4.2%	4.0%
Gin Gin	0.3%	0.6%	4.8%
Inside PIA	**63.0%**	**65.6%**	**74.9%**
Outside PIA	**37.0%**	**34.4%**	**25.1%**
Bundaberg Regional Council	**100.0%**	**100.0%**	**100.0%**

Source: ABS ERP data and Bundaberg Regional Council LGIP (2015)

2.2.4 Potential Population Outlook based on Continuation of Current Trends

The revised population projections presented in this analysis represent a continuation of current population trends across Bundaberg Regional Council and assumes residential capacity remains to accommodate this growth. The revised population outlook for Bundaberg Regional Council by community has been derived based on the following assumptions:

+ 2021 population estimates by community to align with ERP data;
+ 2036 population to reach 118,979 persons by 2036, representing a continuation of the 2017-2021 growth rate to 2036. This 2036 population estimate is similar to both the 2023 QGSO high series and the latest LGIP estimates. Whilst population growth in the 2021-22 period was the highest on record, it is anticipated population growth will moderate in the longer term to 2036;
+ Adjustments to the distribution of population growth in each five year interval to 2036, based on consideration of:
    - 2023 QGSO population projections by SA2;
    - Observed population growth trends, including whether these are anticipated to shift significantly; and
    - Observed proportion of population growth both within and outside of the PIA. The assessment has assumed 70% of population growth in the 2021-2031 period occurs within the PIA, which represents continued improvement relative to longer term trends but is less optimistic than the current LGIP;

The revised shares of growth are summarised in the Table below, with the adjusted distributions highlighted in grey.

Table 2-7 Share of Population Growth by Community, LGIP and Bull & Bear Estimates

Community	Bundaberg LGIP			Bull & Bear Economics		
	2021-26	2026-31	2031-36	2021-26	2026-31	2031-36
Greater Bundaberg	38.0%	37.7%	22.6%	29.4%	29.8%	30.5%
Bargara	17.0%	20.1%	15.6%	21.0%	20.5%	20.0%
Burnett Heads	3.1%	4.0%	3.4%	4.0%	4.0%	3.4%
Elliott Heads	5.3%	2.8%	2.3%	1.5%	1.5%	1.3%
Innes Park/Coral Cove	4.7%	3.9%	3.6%	4.7%	3.9%	3.6%
Moore Park	1.6%	2.6%	2.1%	1.6%	2.6%	2.1%
Childers	2.8%	3.1%	1.7%	2.8%	3.1%	1.7%
Woodgate	4.5%	4.0%	3.4%	4.5%	4.0%	3.4%

Community	Bundaberg LGIP			Bull & Bear Economics		
	2021-26	2026-31	2031-36	2021-26	2026-31	2031-36
Gin Gin	5.6%	5.2%	3.6%	0.6%	0.5%	0.4%
Inside PIA	82.5%	83.4%	58.3%	70.0%	70.0%	66.4%
Outside PIA	17.5%	16.6%	41.7%	30.0%	30.0%	33.6%
Bundaberg Regional Council	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Bundaberg Regional Council LGIP (2015), Bull & Bear Economics estimates

Table 2-8 summarises the potential population outlook based on a continuation of current trends by community in the 2021 to 2036 period.

Table 2-8 Potential Population Outlook by Community – Continuation of Current Trends, Bundaberg Regional Council, 2021-36

Community	2021	2026	2031	2036
Greater Bundaberg	48,843	50,740	52,609	54,481
Bargara	8,993	10,348	11,634	12,861
Burnett Heads	2,949	3,207	3,458	3,666
Elliott Heads	925	1,022	1,116	1,196
Innes Park/Coral Cove	2,598	2,898	3,142	3,362
Moore Park	2,317	2,422	2,586	2,717
Childers	1,647	1,828	2,024	2,132
Woodgate	1,369	1,657	1,910	2,118
Gin Gin	1,258	1,297	1,328	1,353
Inside PIA	**70,899**	**75,418**	**79,807**	**83,884**
Outside PIA	**29,219**	**31,152**	**33,035**	**35,095**
Bundaberg Regional Council	**100,118**	**106,570**	**112,842**	**118,979**

Source: Bull & Bear Economics estimates

2.3 Dwelling Trends

This section considers observed dwelling and household trends, particularly the distribution of dwellings across Bundaberg Regional Council by typology. This section also considers the QGSO dwelling projections and LGIP dwelling projections at a high level.

The estimates presented in this report represent total dwellings as opposed to occupied dwellings.

2.3.1 Observed Dwellings

The LGIP planning assumptions consider dwelling projections for single, multiple and other dwellings. To align and assess dwelling projections within the context of observed trends as indicated by the 2011, 2016 and 2021 Censuses, the following terminology is utilised:

+ Detached dwellings: referring to single dwellings in the LGIP context and separate houses under the Census definition;
+ Semi-detached and attached dwellings: referring to multiple dwellings in the LGIP context and the varying definitions of semi-detached and flats/apartments used within the Census; and
+ Other dwellings: referring to other dwellings in the LGIP context and any classifications used within the Census which cannot be categorised in the prior definitions (e.g. caravan, cabin, improvised home, etc).

2.3.1.1 Dwellings by Type

Over the last three Censuses, there were an additional 4,734 dwellings in Bundaberg Regional Council, with growth concentrated within the detached segment (additional 4,100 dwellings). Over the ten year period, detached dwellings have represented ~82-83% of new dwellings, while semi-detached and attached dwellings represented ~13-14% of new dwellings.

Table 2-9 provides a breakdown of dwellings within Bundaberg Regional Council by dwelling type as of the 2011, 2016 and 2021 Censuses.

Table 2-9 Dwellings by Type – Bundaberg Regional Council, 2011 to 2021

	2011	2016	2021	Change, 2011-21
Number				
Detached	33,705	36,143	37,805	4,100
Semi-Detached / Attached	5,241	5,568	6,182	941
Other	2,008	1,992	1,701	-307
Total	**40,954**	**43,703**	**45,688**	**4,734**
Proportion (%)				
Detached	82.3%	82.7%	82.7%	0.4%
Semi-Detached / Attached	12.8%	12.7%	13.5%	0.7%
Other	4.9%	4.6%	3.7%	-1.2%
Total	**100.0%**	**100.0%**	**100.0%**	**-**

Source: Census of Population and Housing (2011, 2016, 2021)

In all communities within Bundaberg Regional Council, dwellings were predominately detached dwellings, representing between 70.4% and 96.2% of the dwelling stock in each community. Attached dwelling stock was most prevalent in Greater Bundaberg and Bargara.

Table 2-10 Distribution of Dwellings by Type and Community, Bundaberg Regional Council, 2021

	Detached	Semi-detached / Attached	Other	Total
Greater Bundaberg	76.2%	21.3%	2.4%	100.0%
Bargara	70.4%	24.5%	5.1%	100.0%
Burnett Heads	90.3%	1.7%	8.0%	100.0%
Elliott Heads	82.9%	2.0%	15.1%	100.0%
Innes Park/Coral Cove	97.7%	2.3%	0.0%	100.0%
Moore Park	85.3%	7.3%	7.4%	100.0%
Childers	79.9%	9.8%	10.3%	100.0%
Woodgate	84.0%	6.0%	10.0%	100.0%
Gin Gin	82.9%	9.0%	8.2%	100.0%
Inside PIA	**77.6%**	**18.4%**	**3.9%**	**100.0%**
Outside PIA	**96.2%**	**0.6%**	**3.2%**	**100.0%**
Bundaberg Regional Council	**82.7%**	**13.5%**	**3.7%**	**100.0%**

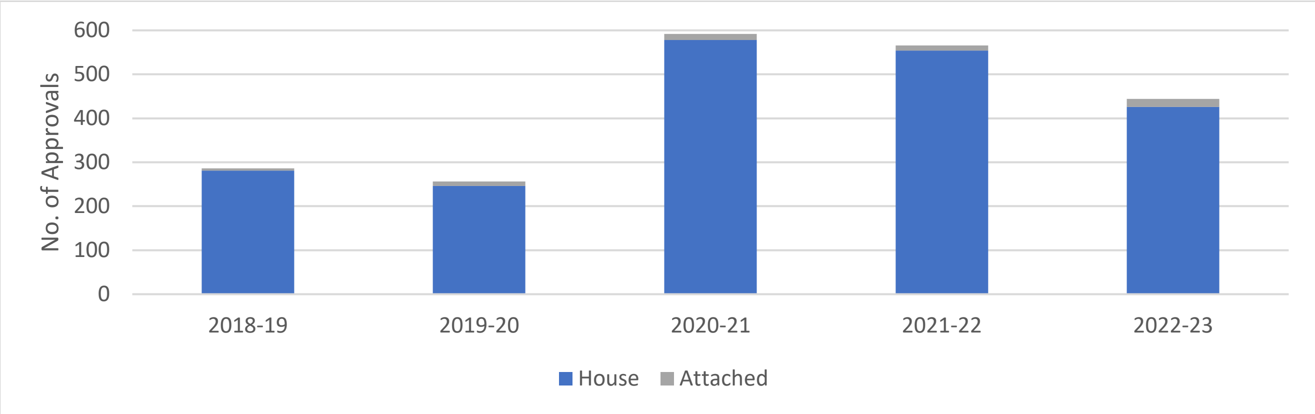
Source: Census of Population and Housing (2011, 2016, 2021)

2.3.1.2 Dwelling Approvals

Over the past five years, new dwelling approvals in Bundaberg Regional Council have been predominately for houses, accounting for between 95.9% and 98.3% of dwelling approvals.

Between 2018-19 and 2022-23, the number of new house approvals peaked in 2020-21 at 578 dwellings. Since 2020-21, the number of new house approvals per annum has declined but remained above pre-2020-21 figures. Since 2018-19, there have been 59 new attached dwelling approvals (which includes semi-detached dwelling approvals) across Bundaberg Regional Council, with a peak of 18 approvals in 2022-23.

Figure 2-2 New House and Attached Dwelling Approvals – Bundaberg Regional Council, 2018-19 to 2022-23

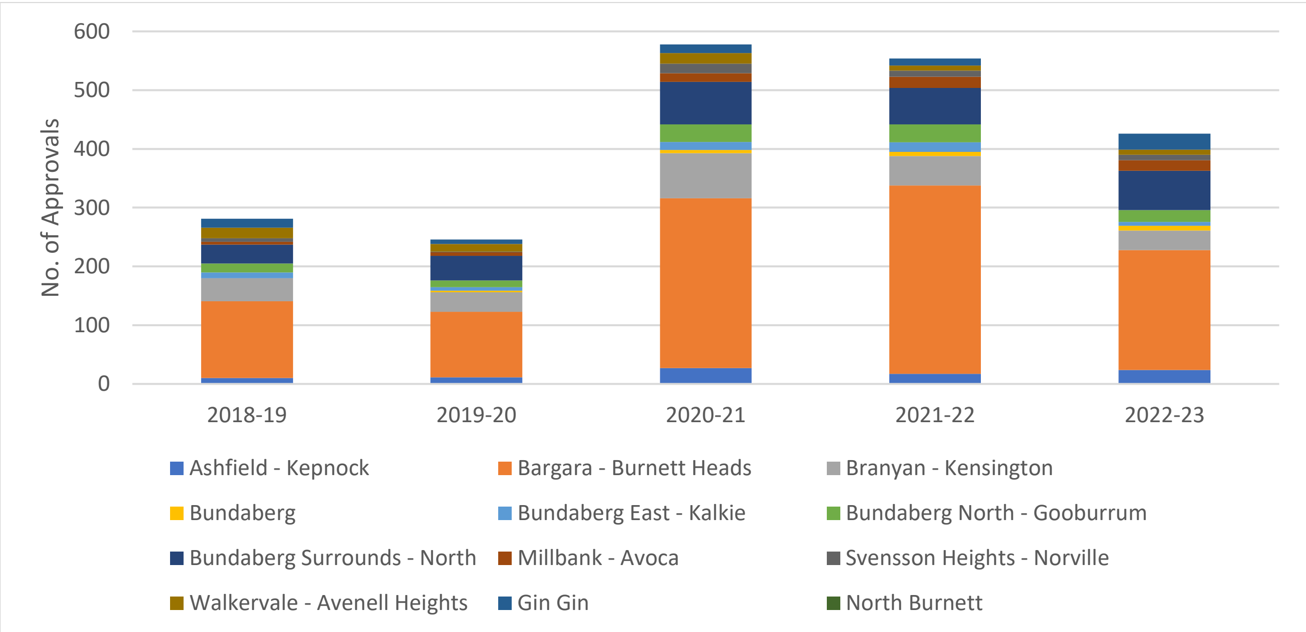


Source: ABS (2023)

The majority of new house approvals over the 2018-19 period occurred within Bargara – Burnett Heads SA2, ranging from 45.5 % to 57.9% of total house approvals. Over the same period, Bundaberg SA2 and Bargara – Burnett Heads SA2s accounted for the majority of the new attached dwelling approvals. Notably, these approvals were generally for townhouses.

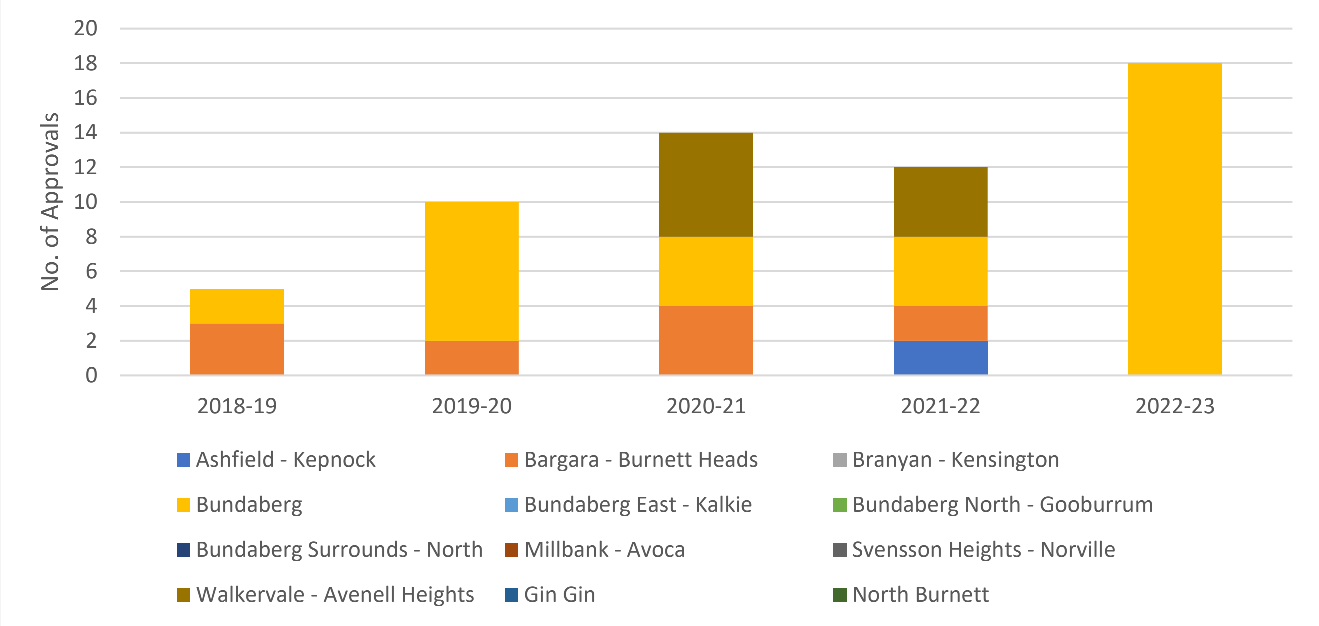
Figure 2-3 illustrates the distribution of new house approvals between 2018-19 and 2022-23, while Figure 2-4 illustrates the distribution of new attached dwelling approvals (number of dwellings) over the same period.

Figure 2-3 Distribution of New House Approvals – Bundaberg Regional Council, 2018-19 to 2022-23



Source: ABS (2023)

Figure 2-4 Distribution of New Attached Dwelling Approvals – Bundaberg Regional Council, 2018-19 to 2022-23



Source: ABS (2023)

2.3.2 Projected Dwellings

This sub-section provides an overview of the dwelling outlook based on the QGSO low, medium and high series dwelling projections released in 2023 and the latest LGIP dwelling projections. This assessment has not considered the previous QGSO dwelling projection dataset, as it was publicly available only at the LGA level and above.

2.3.2.1 Bundaberg Regional Council

The QGSO projections anticipate an additional 2,392 to 8,642 dwellings in Bundaberg Regional Council over the 2021 to 2036 period. By comparison, the Bundaberg LGIP estimate of dwellings falls between the medium and high series, with an additional 7,376 dwellings between 2021 and 2036.

Table 2-11 compares the total dwelling projections in Bundaberg Regional Council under the LGIP against the QGSO low, medium and high series dwelling projections.

Table 2-11 Comparison of Total Dwelling Projections – Bundaberg Regional Council, 2021 to 2036

	2021	2026	2031	2036	Change, 2021-36	Ave. Ann. Growth, 2021-36
QGSO Projections (2023)						
Low series	43,974	45,329	46,104	46,366	2,392	0.4%
Medium series	43,974	46,008	47,820	49,318	5,344	0.8%
High series	43,974	46,725	49,702	52,616	8,642	1.2%
Bundaberg LGIP	44,345	46,934	49,397	51,721	7,376	1.0%

Source: Bundaberg Regional Council LGIP (2015) & QGSO (2023)

At an SA2 level, the Bargara – Burnett Heads SA2 is anticipated to account for 46.5% (low series) to 48.4% (high series) of total dwelling growth under the varying QGSO projection series. The SA2s within Greater Bundaberg are also cumulatively anticipated to account for a significant portion of dwelling growth, ranging from 41.9% (high series) to 45.5% of growth (low series). The SA2s of Branyan – Kensington and Bundaberg East – Kalkie are anticipated to account for half of the dwelling growth within Greater Bundaberg.

The distribution of population growth as per the QGSO dwelling projections appears broadly appropriate based on the anticipated outlook for Bundaberg Regional Council. The data clearly highlights the increasing pressure on coastal communities in Bargara – Burnett Heads SA2 to accommodate growth in the high series, as opposed to Greater Bundaberg.

Table 2-12 details the anticipated distribution of dwelling growth by SA2 under the 2023 QGSO low, medium and high series dwelling projections for the 2021 to 2036 period.

Table 2-12 Proportion of Dwelling Growth by Projection Series and SA2 – Bundaberg Regional Council, 2021 to 2036

	Low Series	Medium Series	High Series
Greater Bundaberg SA2s	45.5%	42.8%	41.9%
Ashfield - Kepnock	4.1%	4.7%	4.9%
Branyan - Kensington	11.9%	10.7%	10.3%
Bundaberg	3.1%	3.5%	3.6%
Bundaberg East - Kalkie	10.8%	9.9%	9.6%
Bundaberg North - Gooburrum	2.4%	1.9%	1.8%
Millbank - Avoca	3.5%	3.3%	3.2%
Svensson Heights - Norville	4.9%	4.2%	4.0%
Walkervale - Avenell Heights	4.9%	4.6%	4.5%
Bargara - Burnett Heads SA2	46.5%	47.9%	48.4%
Bundaberg Surrounds – North SA2	1.2%	1.8%	2.0%
Bundaberg Surrounds – South SA2	4.0%	4.7%	4.9%
Gin Gin SA2	2.8%	2.7%	2.7%
North Burnett SA2	0.0%	0.0%	0.0%
Bundaberg Regional Council	**2,392**	**5,344**	**8,642**

Source: QGSO (2023)

2.3.2.2 Dwelling Projections by Community

As mentioned above, the LGIP indicates the number of dwellings in Bundaberg Regional Council is anticipated to increase from 44,345 dwellings in 2021 to 51,271 dwellings in 2036. At ultimate development, an estimated 78,656 dwellings are anticipated across Bundaberg Regional Council, comprising 43,340 dwellings within the PIA and 35,316 dwellings outside the PIA.

Table 2-13 details the existing and projected dwelling figures as indicated by the LGIP.

Table 2-13 Existing and Projected Dwellings – Bundaberg Regional Council, 2021 to 2036

Community	2021	2026	2031	2036	Ultimate Development (Capacity)
Greater Bundaberg	21,603	22,628	23,586	24,162	26,882
Bargara	4,339	4,751	5,217	5,569	6,571
Burnett Heads	1,259	1,339	1,433	1,511	1,801
Elliott Heads	592	715	780	832	960
Innes Park/Coral Cove	1,031	1,143	1,234	1,315	1,598
Moore Park	793	835	897	946	1,315
Childers	727	794	868	908	1,039
Woodgate	1,193	1,301	1,397	1,475	2,077
Gin Gin	571	700	816	895	1,097
Inside PIA	**32,108**	**34,207**	**36,228**	**37,614**	**43,340**
Outside PIA	**12,237**	**12,727**	**13,168**	**14,107**	**35,316**
Bundaberg Regional Council	**44,345**	**46,934**	**49,397**	**51,721**	**78,656**

Source: Bundaberg Regional Council LGIP (2015)

2.3.3 Potential Dwelling Outlook based on Continuation of Recent Trends

The potential dwelling outlook presented in this section of the report is reflective of the continuation of recent trends, as opposed to an identification of the preferred growth outlook. In preparing this potential outlook for the Bundaberg region, the following assumptions have been adopted:

- 2021 dwelling estimate for Bundaberg Regional Council is consistent with QGSO estimates, with the distribution of dwellings by community consistent with the 2021 Census;
- 2021 population estimate by community consistent with ERP estimates to derive average persons per dwelling;
- Projected dwellings in Bundaberg Regional Council consistent with the QGSO high series. The distribution of growth has been determined based on a general decline in average household size across the region between 2021 and 2036 and then rebased to the QGSO total dwelling estimate. This has resulted in an increase in average household size over time in Greater Bundaberg, reflective of this region attracting a significant share of additional families in the region choosing to locate in proximity to job opportunities.

Based on the above assumptions, the average number of persons per dwelling is projected to decline from 2.28 persons per dwelling in 2021 to 2.26 persons per dwelling in 2036 In Bundaberg Regional Council.

Table 2-14 Amended Average Persons per Dwelling by Community, Bundaberg LGIP, 2021 to 2036

Community	2021	2026	2031	2036
Greater Bundaberg	2.33	2.43	2.42	2.41
Bargara	2.06	2.07	2.06	2.05
Burnett Heads	2.12	2.13	2.12	2.11
Elliott Heads	1.77	1.77	1.76	1.75
Innes Park/Coral Cove	2.66	2.66	2.65	2.64
Moore Park	2.09	2.09	2.08	2.08
Childers	2.03	2.03	2.02	2.01

Community	2021	2026	2031	2036
Woodgate	1.20	1.20	1.19	1.19
Gin Gin	2.09	2.10	2.09	2.08
Inside PIA	**2.22**	**2.28**	**2.26**	**2.24**
Outside PIA	**2.41**	**2.29**	**2.30**	**2.31**
Bundaberg Regional Council	**2.28**	**2.28**	**2.27**	**2.26**

Source: Bull & Bear Economics estimates, based on 2021 Census data

Based on the revised estimates of persons per dwelling and the adjusted population projections presented in Table 2-14 above, the dwelling projections (based on a continuation of current trends) are presented in Table 2-15 below.

Table 2-15 Potential Dwelling Projections by Community - Continuation of Current Trends, 2021 to 2036

Community	2021	2026	2031	2036
Revised Dwelling Projections				
Greater Bundaberg	20,948	20,909	21,778	22,644
Bargara	4,361	5,009	5,657	6,279
Burnett Heads	1,390	1,509	1,634	1,740
Elliott Heads	524	577	633	681
Innes Park/Coral Cove	977	1,088	1,185	1,273
Moore Park	1,109	1,157	1,241	1,309
Childers	812	900	1,001	1,059
Woodgate	1,144	1,383	1,601	1,782
Gin Gin	601	618	636	650
Inside PIA	**31,866**	**33,149**	**35,367**	**37,417**
Outside PIA	**12,108**	**13,576**	**14,335**	**15,199**
Bundaberg Regional Council	**43,974**	**46,725**	**49,702**	**52,616**

Source: Bull & Bear Economics estimates

2.3.3.1 Potential Dwelling Projections by Typology

In converting dwelling projections to dwelling projections by typology, consideration has been given to Census data, in conjunction with residential building approval trends.

In Bundaberg Regional Council, there has been very few attached dwelling approvals in the past five years, representing less than 5% of all approvals throughout the region, including the coastal communities. The assessment has made the following assumptions regarding the delivery of dwellings by community:

- Greater Bundaberg and coastal communities: 5% of additional dwellings are delivered as attached dwellings; and
- Remainder of Bundaberg Regional Council: Additional dwellings are delivered as detached dwellings.

In determining the distribution of dwellings within Bundaberg Regional Council in 2021, the dwelling split as of the 2021 Census for each community has been applied.

The assumptions adopted in this analysis are based on the continuation of recent development trends within the region. However, the outlook within Bundaberg Regional Council could differ if policy levers are utilised (e.g. through the incentivisation of the delivery of attached dwellings in Bundaberg CBD).

Based on the following data sources, the potential dwelling projections by typology are presented in Table 2-16 below, based on a continuation of current trends. This analysis highlights population growth is anticipated to be primarily accommodated in detached dwellings, based on recent market trends.

Table 2-16 Dwelling Projections by Typology – Bundaberg Regional Council, 2021 to 2036

Community	2021	2026	2031	2036
Detached Dwellings				
Greater Bundaberg	16,361	16,323	17,149	17,971
Bargara	3,236	3,852	4,467	5,058
Burnett Heads	1,363	1,476	1,596	1,696
Elliott Heads	511	562	615	661
Innes Park/Coral Cove	954	1,060	1,152	1,235
Moore Park	1,021	1,069	1,153	1,221
Childers	723	810	912	969
Woodgate	1,069	1,307	1,525	1,707
Gin Gin	542	559	577	591
Inside PIA	**25,780**	**27,019**	**29,147**	**31,111**
Outside PIA	**12,037**	**13,505**	**14,264**	**15,128**
Bundaberg Regional Council	**37,818**	**40,524**	**43,411**	**46,239**
Attached Dwellings				
Greater Bundaberg	4,588	4,586	4,629	4,672
Bargara	1,125	1,158	1,190	1,221
Burnett Heads	26	32	39	44
Elliott Heads	13	15	18	20
Innes Park/Coral Cove	22	28	33	37
Moore Park	88	88	88	88
Childers	89	89	89	89
Woodgate	76	76	76	76
Gin Gin	59	59	59	59
Inside PIA	**6,086**	**6,130**	**6,220**	**6,307**
Outside PIA	**71**	**71**	**71**	**71**
Bundaberg Regional Council	**6,156**	**6,201**	**6,291**	**6,377**

Source: Bull & Bear Economics Estimates (2023) derived from QGSO Dwelling Projections (2023)

2.3.4 Indicative Land Demand based on Continuation of Current Trends

To convert the potential dwelling projections (based on a continuation of current trends) to an indicative land requirement, the assessment has applied the following density assumptions:

+ Detached dwellings: Average dwelling density of 10-12 dwellings per hectare; and
+ Attached dwellings: 30 dwellings per hectare.

The assessment has focussed on the incremental land requirements, i.e. the quantum of land required over and above 2021 demand. These incremental demand estimates can be compared against remaining supply estimates (not presented in this report) to provide insights into whether sufficient zoned land exists to accommodate growth in demand to 2036.

Between 2021 and 2036, incremental residential land demand is estimated to be:

+ 702-842 hectares for detached dwellings; and
+ Seven hectares for attached dwellings.

The analysis identifies there is the potential for significant demand for additional residential land within Bargara, particularly over the next ten years. In the absence of sufficient supply for this demand to be met, it is anticipated growth may shift to other coastal communities within Bundaberg Regional Council.

The latest available estimates of residential capacity are contained within the Cardno HRP Housing and Residential Development Planning Study, completed in October 2012. Whilst this study does not clearly state remaining vacant capacity, it provides insights into developable residential land capacity within urban growth areas in Kalkie-Ashfield, Branyan, Burnett Heads, Bargara and Elliott Heads. This study identified these areas could potentially accommodate ~14,000 – 25,000 dwellings. The Housing and Residential Development Planning Study also identifies an indicative yield of 2,100 dwellings in infill development areas. The Rural Residential zone within Bundaberg Regional Council also has significant remaining capacity, based on estimates prepared in 2022 as part of the Emzay appeal, where over 700 hectares of vacant land was identified.

By comparison, there have been an ~4,500 additional dwellings in Bundaberg Regional Council between 2011 and 2021, with an additional ~8,600 dwellings demanded to 2036. This indicates significant remaining zoned capacity within Bundaberg Regional Council to accommodate residential growth to 2036. Therefore, the focus should be on the appropriate sequencing of residential opportunities within Bundaberg Regional Council, as opposed to the zoning of additional land for residential purposes.

Table 2-17 details incremental residential land demand by dwelling typology for all Bundaberg Regional Council LGIP communities from 2021 to 2036, based on a continuation of current growth trends.

Table 2-17 Potential Incremental Residential Land Demand by Dwelling Typology (ha) – Continuation of Current Trends, Bundaberg Regional Council, 2021 to 2036

Community	2021-26	2021-31	2021-36
Detached Dwellings			
Greater Bundaberg	-3 - -4	66 - 79	134 - 161
Bargara	51 - 62	103 - 123	152 - 182
Burnett Heads	9 - 11	19 - 23	28 - 33
Elliott Heads	4 - 5	9 - 10	12 - 15
Innes Park/Coral Cove	9 - 11	16 - 20	23 - 28
Moore Park	4 - 5	11 - 13	17 - 20
Childers	7 - 9	16 - 19	21 - 25
Woodgate	20 - 24	38 - 46	53 - 64
Gin Gin	1 - 2	3 - 4	4 - 5
Inside PIA	**103 - 124**	**281 - 337**	**444 - 533**
Outside PIA	**122 - 147**	**186 - 223**	**258 - 309**
Bundaberg Regional Council	**226 - 271**	**466 - 559**	**702 - 842**

Community	2021-26	2021-31	2021-36
Attached Dwellings			
Greater Bundaberg	0	1	3
Bargara	1	2	3
Burnett Heads	0	0	1
Elliott Heads	0	0	0
Innes Park/Coral Cove	0	0	0
Moore Park	0	0	0
Childers	0	0	0
Woodgate	0	0	0
Gin Gin	0	0	0
Inside PIA	**1**	**4**	**7**
Outside PIA	**0**	**0**	**0**
Bundaberg Regional Council	**1**	**4**	**7**

Source: Bull & Bear Economics Estimates (2023) derived from QGSO Dwelling Projections (2023)

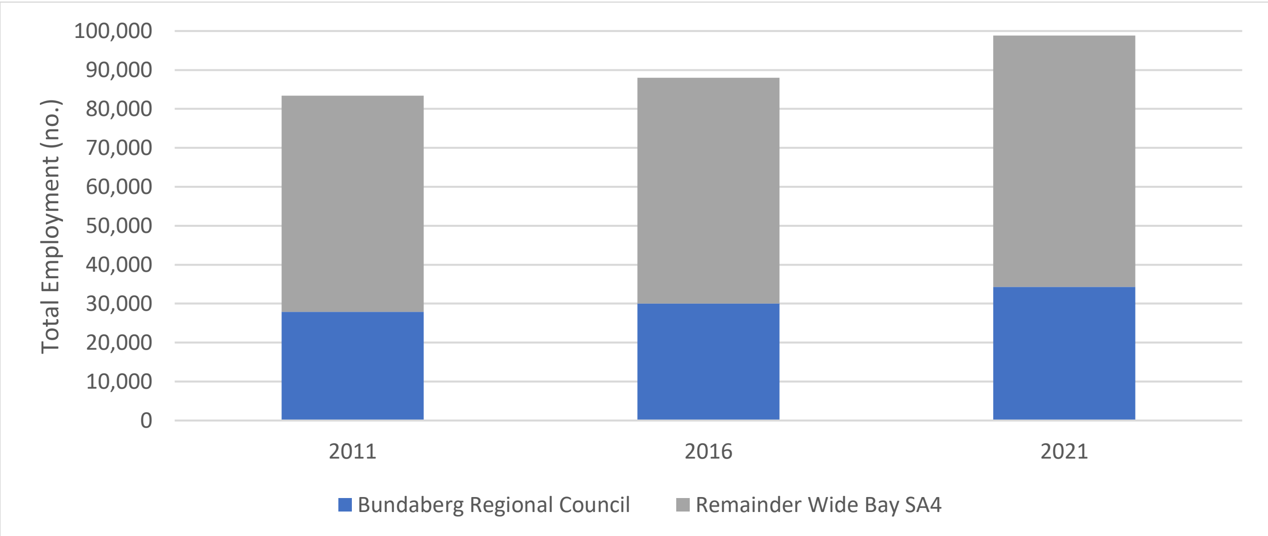
2.4 Employment

This section considers observed employment in Bundaberg Regional Council within the context of the wider region of Wide Bay SA4 utilising working population data from the ABS Census of Population and Housing. This section also considers projected employment as presented in the LGIP (recognising these assumptions inform planning scheme outcomes) against anticipated working population growth within Bundaberg Regional Council, based on a continuation of current trends.

2.4.1 Observed Employment

Over the 2011 to 2021 period, total employment within Bundaberg Regional Council has increased by 6,355 workers, from 27,917 workers to 34,272 workers. Within the wider Wide Bay SA4 region, employment increased by 15,453 workers, from 83,412 workers in 2011 to 98,865 workers in 2021. Over the ten year period, the proportion of Wide Bay SA4 employment attributed to Bundaberg Regional Council has grown, increasing from 33.5% to 34.7% of total employment. Notably, approximate 41.1% of total employment within Wide Bay SA4 between 2011 and 2021 occurred within Bundaberg Regional Council.

Figure 2-5 Total Employment – Bundaberg Regional Council and Wide Bay SA4, 2011 to 2021



Source: Census of Population and Housing (2011, 2016, 2021)

As of the 2021 Census, the most significant sectors of employment in Bundaberg Regional Council were health care and social assistance, retail trade and agriculture. In terms of employment growth, the health care and social assistance, agriculture, forestry and fishing, construction and manufacturing sectors recorded the most significant growth in the number of additional employed persons between 2016 and 2021. This represents a reversal in the trend recorded in the 2011 to 2016 period for manufacturing, which recorded the largest decline in employed persons in this period.

At a sectoral level, Bundaberg Regional Council accounted for a significant portion of Wide Bay SA4 employment within financial and insurance services (44.9% of employment), agriculture, forestry and fishing (42.6% of employment) and wholesale trade (39.2% of employment).

The industries of arts and recreation services, agriculture, forestry and fishing, and electricity, gas, water and waste services reported the highest growth in terms of employment as a proportion of total Wide Bay employment (increase of 4.2-5.8% between 2011 and 2021).

Table 2-18 summarises observed employment within Bundaberg Regional Council as a proportion of Wide Bay SA4 between 2011 and 2021.

Table 2-18 Observed Employment – Bundaberg Regional Council and Wide Bay SA4, 2011 to 2021

	Bundaberg Regional Council			Wide Bay SA4			% of SA4		
	2011	2016	2021	2011	2016	2021	2011	2016	2021
Agriculture, Forestry and Fishing	2,698	3,215	3,824	7,319	8,179	8,985	36.9%	39.3%	42.6%
Mining	77	86	105	724	907	819	10.6%	9.5%	12.8%
Manufacturing	2,570	2,087	2,385	7,829	6,417	7,244	32.8%	32.5%	32.9%
Electricity, Gas, Water and Waste Services	307	291	348	1,451	1,249	1,371	21.2%	23.3%	25.4%
Construction	1,623	1,885	2,272	4,888	5,626	7,346	33.2%	33.5%	30.9%
Wholesale Trade	874	651	652	2,362	1,745	1,664	37.0%	37.3%	39.2%
Retail Trade	3,968	3,880	3,957	11,327	11,151	11,666	35.0%	34.8%	33.9%
Accommodation and Food Services	1,922	2,299	2,498	6,172	6,848	7,704	31.1%	33.6%	32.4%
Transport, Postal and Warehousing	985	1,120	1,120	3,081	3,307	3,430	32.0%	33.9%	32.7%
Information Media and Telecommunications	236	247	159	771	731	534	30.6%	33.8%	29.8%
Financial and Insurance Services	554	505	538	1,329	1,188	1,197	41.7%	42.5%	44.9%
Rental, Hiring and Real Estate Services	451	478	460	1,341	1,426	1,338	33.6%	33.5%	34.4%
Professional, Scientific and Technical Services	1,029	1,052	1,110	2,858	2,904	3,076	36.0%	36.2%	36.1%
Administrative and Support Services	686	869	903	2,025	2,520	2,553	33.9%	34.5%	35.4%
Public Administration and Safety	1,490	1,561	1,741	4,963	5,211	5,622	30.0%	30.0%	31.0%
Education and Training	2,506	2,946	3,210	7,918	9,121	9,703	31.6%	32.3%	33.1%
Health Care and Social Assistance	4,584	5,382	7,287	12,979	14,957	19,610	35.3%	36.0%	37.2%
Arts and Recreation Services	198	275	322	618	792	850	32.0%	34.7%	37.9%
Other Services	1,159	1,212	1,381	3,457	3,709	4,153	33.5%	32.7%	33.3%
Total	**27,917**	**30,041**	**34,272**	**83,412**	**87,988**	**98,865**	**33.5%**	**34.1%**	**34.7%**

Source: Census of Population and Housing (2011, 2016, 2021)

Over the 2011 to 2021 period, employment was primarily concentrated within the SA2s of Greater Bundaberg; however, the proportion of employment within this sub-region declined marginally from 73.5% of total employment in 2011 to 72.7% of total employment in 2021. Bundaberg SA2 reported the highest proportion of employment over the ten year period, despite declining marginally from 31.5% to 30.2% of total employment in the 2011 to 2021 period. The SA2s of Bundaberg Surrounds – South and Svensson Heights – Norville also reported significant employment (9.9% and 9.1% of total employment in 2021) and a decline in the proportion of employment over the ten year period (decrease of 0.4% points in both SA2s). In contrast, the SA2s of Branyan – Kensington and Bargara – Burnett Heads reported the most significant growth in employment as a proportion of total employment (increase of 2.0% and 1.7%, respectively).

Table 2-19 summarises observed employment by SA2 within Bundaberg Regional Council over the 2011 to 2021 period.

Table 2-19 Observed Employment by SA2 – Bundaberg Regional Council, 2011 to 2021

SA2 / Community	No.			%		
	2011	2016	2021	2011	2016	2021
Greater Bundaberg	20,552	21,877	24,894	73.6%	72.8%	72.7%
Ashfield - Kepnock	1,050	1,024	850	3.8%	3.4%	2.5%
Branyan - Kensington	881	1,200	1,764	3.2%	4.0%	5.1%
Bundaberg	8,788	9,219	10,347	31.5%	30.7%	30.2%
Bundaberg East - Kalkie	2,363	2,586	2,861	8.5%	8.6%	8.4%
Bundaberg North - Gooburrum	1,749	1,894	2,188	6.3%	6.3%	6.4%
Millbank - Avoca	1,786	1,965	2,083	6.4%	6.5%	6.1%
Svensson Heights - Norville	2,668	2,639	3,127	9.6%	8.8%	9.1%
Walkervale - Avenell Heights	1,267	1,350	1,674	4.5%	4.5%	4.9%
Bargara - Burnett Heads	2,049	2,512	3,081	7.3%	8.4%	9.0%
Bundaberg Surrounds - North	1,272	1,332	1,625	4.6%	4.4%	4.7%
Bundaberg Surrounds - South	2,877	3,106	3,390	10.3%	10.3%	9.9%
Gin Gin	1,182	1,233	1,264	4.2%	4.1%	3.7%
North Burnett	0	0	4	0.0%	0.0%	0.0%
Bundaberg Regional Council	**27,932**	**30,060**	**34,258**	**100.0%**	**100.0%**	**100.0%**

Source: Census of Population and Housing (2011, 2016, 2021)

By way of comparison, the LGIP estimated 36,407 employed persons in Bundaberg Regional Council in 2021, which is marginally higher than employment estimates published in the 2021 Census. However, it is recognised the Census tends to marginally under enumerate, with the LGIP estimates 6.3% above Census estimates. Therefore, total employment estimates for Bundaberg Regional Council as of 2021 are considered appropriate for this assessment.

At a small area level, both the LGIP and Census anticipated approximately three quarters of employment to be within Greater Bundaberg. A comparison of the Census and LGIP estimates indicate a significant proportion of employment in Bargara – Burnett Heads, Bundaberg Surrounds – North and Bundaberg Surrounds – South SA2s is outside of the PIA, which likely represents the presence of agricultural enterprises in the rural SA2s (which typically are beyond PIA boundaries), in conjunction with employment precincts outside of the PIA (in the case of Bargara – Burnett Heads).

The assessment indicates the assumed distribution and scale of employment in the LGIP as of 2021 appears appropriate, based on Census data.

Table 2-20 compares total employment in 2021 as reported by the LGIP and Census.

Table 2-20 Comparison of Total Employment Estimates – Bundaberg Regional Council, 2021

SA2 / Community	LGIP		Census		Difference	
	No.	%	No.	%	No.	%
Greater Bundaberg	27,418	75.3%	24,894	72.7%	2,524	2.6%
Bargara - Burnett Heads	1,885	5.2%	3,081	9.0%	-1,196	-3.8%
Bundaberg Surrounds - North	167	0.5%	1,625	4.7%	-1,458	-4.3%
Bundaberg Surrounds - South	1,461	4.0%	3,390	9.9%	-1,929	-5.9%
Gin Gin	884	2.4%	1,264	3.7%	-380	-1.3%
North Burnett	-	-	4	0.0%	-	-
Inside PIA	**31,814**	**81.4%**	**-**	**-**	**-**	**-**
Outside PIA	**4,592**	**12.6%**	**-**	**-**	**-**	**-**
Bundaberg Regional Council	**36,406**	**100.0%**	**34,258**	**100.0%**	**2,149**	**-**

Source: Bundaberg Regional Council LGIP (2015), Census of Population and Housing (2011, 2016, 2021)

2.4.2 Projected Employment

Based on the available LGIP planning assumptions, employment in Bundaberg Regional Council is anticipated to increase from 36,406 workers in 2021 to 41,218 workers in 2036, with an ultimate development capacity of 59,279 workers.

Census data has indicated total employment within Bundaberg Regional Council has increased as follows:

+ 2011-2016: Average increase of 426 workers per annum; and
+ 2016-2021: Average increase of 840 workers per annum.

By comparison, employment projections (as presented in the LGIP) anticipate a slowing rate of employment growth per annum, as detailed below:

+ 2021-26: Average increase of 364 workers per annum;
+ 2026-31: Average increase of 278 workers per annum; and
+ 2031-36: Average increase of 320 workers per annum.

Table 2-21 details the existing and projected employment figures as indicated by the LGIP.

Table 2-21 Existing and Projected Employment – Bundaberg Regional Council, 2021 to 2036

Community	2021	2026	2031	2036	Ultimate Development (Capacity)
Greater Bundaberg	27,418	28,864	30,025	31,389	46,107
Bargara	1,672	1,745	1,793	1,844	2,503
Burnett Heads	139	144	148	152	205
Childers	1,393	1,452	1,489	1,529	2,058
Elliott Heads	16	17	18	18	25
Gin Gin	884	921	944	968	1,297
Innes Park/Coral Cove	58	60	62	64	87
Moore Park	167	174	179	184	247
Woodgate	68	71	73	75	102
Inside PIA	**31,814**	**33,449**	**34,729**	**36,222**	**52,629**

Community	2021	2026	2031	2036	Ultimate Development (Capacity)
Outside PIA	**4,592**	**4,778**	**4,885**	**4,996**	**6,649**
Bundaberg Regional Council	**36,406**	**38,226**	**39,614**	**41,218**	**59,279**

Source: Bundaberg Regional Council LGIP (2015)

2.4.3 Alignment of Population and Employment Growth

A comparison of projected population and employment growth under the LGIP has been undertaken to determine whether the proportion of employed residents is anticipated to increase or decline over time. Given the socio-economic characteristics of Bundaberg Regional Council, the proportion of the population employed is anticipated to either remain stable or marginally decline over the projection horizon.

Based on the LGIP, the proportion of the population employed is anticipated to remain relatively stable within the LGA as a whole, but decline in all communities other than Greater Bundaberg, which appears appropriate and reinforces Greater Bundaberg as the focal point of employment opportunity within the region.

Table 2-22 below considers employment as a proportion of population for each community in Bundaberg Regional Council.

Table 2-22 Employment as Proportion of Community - Bundaberg Regional Council, 2021 to 2036

	Employment				Population				% of Population Employed			
	2021	2026	2031	2036	2021	2026	2031	2036	2021	2026	2031	2036
Greater Bundaberg	27,418	28,864	30,025	31,389	50,967	52,935	54,831	55,945	53.8%	54.5%	54.8%	56.1%
Bargara	1,672	1,745	1,793	1,844	10,237	11,115	12,127	12,895	16.3%	15.7%	14.8%	14.3%
Burnett Heads	139	144	148	152	2,970	3,133	3,332	3,499	4.7%	4.6%	4.4%	4.3%
Elliott Heads	16	17	18	18	1,397	1,672	1,812	1,927	1.1%	1.0%	1.0%	0.9%
Innes Park/Coral Cove	58	60	62	64	2,433	2,674	2,870	3,046	2.4%	2.2%	2.2%	2.1%
Moore Park	167	174	179	184	1,870	1,954	2,086	2,191	8.9%	8.9%	8.6%	8.4%
Childers	1,393	1,452	1,489	1,529	1,714	1,859	2,017	2,103	81.3%	78.1%	73.8%	72.7%
Woodgate	68	71	73	75	2,814	3,045	3,248	3,415	2.4%	2.3%	2.2%	2.2%
Gin Gin	884	921	944	968	1,348	1,637	1,898	2,073	65.6%	56.3%	49.7%	46.7%
Inside PIA	**31,814**	**33,449**	**34,729**	**36,222**	**75,749**	**80,023**	**84,220**	**87,094**	**42.0%**	**41.8%**	**41.2%**	**41.6%**
Outside PIA	**4,592**	**4,778**	**4,885**	**4,996**	**28,870**	**29,775**	**30,613**	**32,665**	**15.9%**	**16.0%**	**16.0%**	**15.3%**
Bundaberg Regional Council	**36,406**	**38,226**	**39,614**	**41,218**	**104,619**	**109,798**	**114,833**	**119,759**	**34.8%**	**34.8%**	**34.5%**	**34.4%**

Source: Bundaberg Regional Council LGIP (2015)

2.4.4 Potential Employment Outlook based on Continuation of Current Trends

The assessment has prepared revised employment projections for Bundaberg Regional Council as follows, assuming a continuation of current trends, as detailed in Table 2-23 below.

Table 2-23 Share of Employment Growth by Community, LGIP and Bull & Bear Estimates

Community	2021-26	2026-31	2031-36
Greater Bundaberg	78.7%	80.7%	82.0%
Bargara	4.0%	3.5%	3.2%
Burnett Heads	0.3%	0.3%	0.2%
Elliott Heads	3.2%	2.7%	2.5%
Innes Park/Coral Cove	0.1%	0.1%	0.0%
Moore Park	2.0%	1.7%	1.5%
Childers	0.1%	0.1%	0.1%
Woodgate	0.4%	0.4%	0.3%
Gin Gin	0.2%	0.1%	0.1%
Inside PIA	89.0%	89.5%	90.0%
Outside PIA	11.0%	10.5%	10.0%
Bundaberg Regional Council	100.0%	100.0%	100.0%

Source: Bundaberg Regional Council LGIP (2015), Bull & Bear Economics estimates

Based on the above assumptions, employment in Bundaberg Regional Council is projected to increase from 36,406 persons in 2021 to 42,406 persons in 2036 should current trends continue to 2036.

Table 2-24 Indicative Employment Projections by Community – Continuation of Current Trends, Bundaberg Regional Council, 2021-36

Community	2021	2026	2031	2036
Greater Bundaberg	27,418	29,386	31,000	32,231
Bargara	1,672	1,772	1,841	1,889
Burnett Heads	139	146	152	155
Elliott Heads	16	97	150	188
Innes Park/Coral Cove	58	59	61	61
Moore Park	167	218	251	273
Childers	1,393	1,396	1,399	1,400
Woodgate	68	78	85	89
Gin Gin	884	888	891	893
Inside PIA	**31,814**	**34,040**	**35,830**	**37,180**
Outside PIA	**4,592**	**4,866**	**5,076**	**5,226**
Bundaberg Regional Council	**36,406**	**38,906**	**40,906**	**42,406**

Source: Bull & Bear Economics estimates

2.4.5 Indicative Land Demand based on Continuation of Current Trends

This section provides a high level estimate of indicative land requirements for industrial and centre zoned land within the PIA, based on the employment projections presented in Section 2.4.4, which assume a continuation of current trends to 2036. The analysis has focussed only on land requirements within the PIA, in recognition of this being the focal point for employment zoned land.

Indicative land demand requirements have been prepared based on employment projections by industry at the single digit ANZSIC level. As working population data is available at the SA2 level and above, the LGIP planning areas have been combined as required to illustrate potential outcomes at an SA2 level. Table 2-25 below reiterates the alignment between communities and SA2s.

Table 2-25 Alignment between SA2s and Communities

SA2	Relevant Communities
Ashfield – Kepnock Branyan – Kensington Bundaberg Bundaberg East – Kalkie Bundaberg North – Gooburrum Svensson Heights – Norville Walkervale – Avenell Heights	Greater Bundaberg
Bargara – Burnett Heads	Bargara Burnett Heads Elliott Heads Innes Park / Coral Cove
Bundaberg Surrounds - North	Moore Park
Bundaberg Surrounds - South	Childers Woodgate
Gin Gin	Gin Gin

2.4.5.1 Industrial Land Demand

Indicative industrial land requirements have been estimated based on projected industrial employment, assuming a continuation of current growth trends to 2036. At the single digit ANZSIC level, industrial land demand is generated by the following sectors:

+ Manufacturing;
+ Wholesale Trade; and
+ Transport, Postal and Warehousing.

As with the residential land demand assessment, the analysis focusses on incremental land demand estimates, i.e. the indicative additional land required to accommodate growth in the 2021 to 2036 period should recent growth trends continue to 2036. These estimates can be compared against remaining zoned supply to determine whether sufficient zoned land remains to accommodate projected demand. However, this process must be undertaken with some caution, recognising the composition of remaining zoned supply is likely to represent a mix of allotments and englobo industrial zoned land.

Assuming the distribution of workers in each industry remains consistent with the 2021 Census, industrial employment in Greater Bundaberg is anticipated to increase from 3,400 workers in 2021 to 3,997 workers in 2036. Across the PIA, industrial employment is projected to increase from 3,906 workers in 2021 to 4,555 workers in 2036.

Table 2-26 details industrial employment projections by SA2 between 2021 and 2036.

Table 2-26 Industrial Employment Projections by SA2 – Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021	2026	2031	2036
Greater Bundaberg	3,400	3,644	3,844	3,997
Bargara - Burnett Heads	179	197	209	217
Bundaberg Surrounds - North	13	17	19	21
Bundaberg Surrounds - South	220	222	223	224
Gin Gin	94	95	95	95
Total	**3,906**	**4,174**	**4,391**	**4,555**

Source: Bull & Bear Economics estimates (2023)

Incremental net industrial land demand estimates the amount of additional industrial land allotments that would be required between 2021 and 2036.

The assessment identifies demand for an additional 22 hectares of industrial allotments between 2021 and 2036, with the majority of demand within Greater Bundaberg. By comparison the Activity Centres and Industrial Land Demand Study identified 302.05 hectares of vacant industrial zoned land, suggestive of sufficient remaining capacity to accommodate industrial growth to 2036 in Bundaberg Regional Council, unless vacant industrial land take-up has accelerated significantly within the region since this study was undertaken.

Table 2-27 Incremental Net Industrial Land Demand by SA2 (ha) – Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021-26	2021-31	2021-36
Greater Bundaberg	8	15	20
Bargara - Burnett Heads	1	1	1
Bundaberg Surrounds - North	0	0	0
Bundaberg Surrounds - South	0	0	0
Gin Gin	0	0	0
Total	**9**	**16**	**22**

Source: Bull & Bear Economics estimates (2023)

2.4.5.2 Centres Land Demand

Centres land demand estimates have been prepared based on projected retail and commercial employment and assumptions relating to floor space demand and site cover, based on a continuation of current trends to 2036. As with the industrial land demand projections, the analysis has focussed on SA2 projections, based on data availability.

This assessment provides insights into the level of additional land demand in the 2021 to 2036 period. It is suggested these demand estimates are compared against remaining zoned supply to determine at a high level whether sufficient zoned supply remains to accommodate demand growth to 2036.

2.4.5.2.1 Commercial Office Land Demand

For the purposes of this assessment, the following sectors typically require commercial office floor space:

+ Information Media and Telecommunications;
+ Financial and Insurance Services;
+ Rental, Hiring and Real Estate Services;
+ Professional, Scientific and Technical Services;
+ Administrative and Support Services;
+ Public Administration and Safety;

- Education and Training; and
- Health Care and Social Assistance.

Assuming the distribution of workers in each industry remains consistent with the 2021 Census, employment contained with commercial office floor space is projected to increase in Greater Bundaberg from 11,439 workers in 2021 to 13,447 workers in 2036. Across the PIA, commercial office employment is projected to increase from 12,374 workers in 2021 to 14,515 workers in 2036.

Table 2-28 details commercial employment projections by SA2 from 2021 to 2036.

Table 2-28 Commercial Employment Projections by SA2 – Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021	2026	2031	2036
Greater Bundaberg	11,439	12,260	12,934	13,447
Bargara - Burnett Heads	528	581	617	642
Bundaberg Surrounds - North	19	25	29	31
Bundaberg Surrounds - South	223	225	227	228
Gin Gin	165	166	166	167
Total	**12,374**	**13,257**	**13,973**	**14,515**

Source: Bull & Bear Economics estimates (2023)

Employment projections are converted to commercial office floor space demand by assuming an average of 15 square metres per worker. Under this assumption commercial office floor space demand in Greater Bundaberg is projected to increase from 171,586 sqm in 2021 to 201,704 sqm in 2036. Across Bundaberg Regional Council, commercial office floor space demand is projected to increase from 185,615 sqm in 2021 to 217,721 sqm by 2036.

Table 2-29 details commercial office floor space demand by SA2 between 2021 to 2036.

Table 2-29 Commercial Floorspace Demand by SA2 (sqm), Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021	2026	2031	2036
Greater Bundaberg	171,586	183,902	194,004	201,704
Bargara - Burnett Heads	7,920	8,716	9,261	9,635
Bundaberg Surrounds - North	285	372	429	467
Bundaberg Surrounds - South	3,349	3,377	3,400	3,415
Gin Gin	2,476	2,487	2,495	2,501
Total	**185,615**	**198,855**	**209,590**	**217,721**

Source: Bull & Bear Economics estimates (2023)

2.4.5.2.2 Retail Land Demand

For the purposes of this assessment, retail floor space demand has been estimated based on projected employment, assuming a continuation of current trends to 2036. Whilst it is recognised retail expenditure propensities provide a more accurate representation of floor space demand outcomes, this assessment has been utilised to provide a high level indication of the potential scale of floor space demand between 2021 and 2036 at a small area level.

Assuming the distribution of workers in each industry remains consistent with the 2021 Census, retail employment is projected to increase in Greater Bundaberg from 3,591 workers in 2021 to 4,221 workers in 2036. Across Bundaberg Regional Council, retail employment is projected to increase from 3,956 workers in 2021 to 4,631 workers in 2036.

Table 2-30 details retail employment projections by SA2 from 2021 to 2036.

Table 2-30 Retail Employment Projections by SA2, Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021	2026	2031	2036
Greater Bundaberg	3,591	3,848	4,060	4,221
Bargara - Burnett Heads	171	188	200	208
Bundaberg Surrounds - North	7	9	11	11
Bundaberg Surrounds - South	103	103	104	105
Gin Gin	85	86	86	86
Total	3,956	4,234	4,460	4,631

Source: Bull & Bear Economics estimates (2023)

Employment projections are converted to retail floorspace demand by assuming an average of 35 sqm per worker. Under this assumption retail floorspace demand in Greater Bundaberg is projected to increase from 125,669 sqm in 2021 to 147,727 sqm in 2036. Within Bundaberg Regional Council, retail floor space demand is estimated to increase from 138,464 sqm in 2021 to 162,073 sqm in 2036.

Table 2-31 details retail floor space demand by SA2 from 2021 to 2036.

Table 2-31 Retail Floorspace Demand by SA2 (sqm), Continuation of Current Trends, Bundaberg Regional Council, 2021-36

SA2	2021	2026	2031	2036
Greater Bundaberg	125,669	134,689	142,088	147,727
Bargara - Burnett Heads	5,974	6,575	6,986	7,268
Bundaberg Surrounds - North	245	319	368	400
Bundaberg Surrounds - South	3,590	3,620	3,645	3,661
Gin Gin	2,986	3,000	3,010	3,016
Total	138,464	148,204	156,097	162,073

Source: Bull & Bear Economics estimates (2023)

2.4.5.2.3 Centres Land Demand

Retail and commercial floor space demand has been converted to an indicative centres land demand, assuming 50% site cover.

The incremental centres land demand estimates the quantum of additional centres land required within the PIA between 2021 and 2036. In the 2021 to 2036 period, there is anticipated to be demand for an additional 11 hectares of centres land, comprising an additional 10 hectares in Greater Bundaberg and an additional hectare in Bargara – Burnett Heads SA2.

The 2012 Activity Centres and Industrial Land Planning Study identified vacant centres land of 34.9 hectares, including 11.4 hectares in Greater Bundaberg, 3.3 hectares in Bargara and 0.1 hectares in Burnett Heads. Additionally, growth in centres floor space demand can be accommodated in vacant tenancies. This is suggestive of sufficient remaining supply to accommodate centres demand growth, although it is suggested further investigations are undertaken regarding centres floor space demand within the coastal communities given out of centre development pressures.

Based on the anticipated distribution of population growth within Bargara – Burnett Heads SA2, it is anticipated the growth in centres floor space demand would be concentrated within Bargara.

Table 2-32 Incremental Centres Land Demand (ha) by SA2, Continuation of Current Trends Bundaberg Regional Council, 2021-36

SA2	2021-26	2021-31	2021-36
Greater Bundaberg	4	8	10
Bargara - Burnett Heads	0	0	1
Bundaberg Surrounds - North	0	0	0
Bundaberg Surrounds - South	0	0	0
Gin Gin	0	0	0
Total	5	8	11

Source: Bull & Bear Economics estimates (2023)

3 Implications for Planning Scheme Review

This assessment has undertaken a high level review of the potential demand for residential, centres and industrial land based on a continuation of recent growth trends within Bundaberg Regional Council. Therefore, estimates presented in this report are considered indicative only, with more detailed studies required to thoroughly investigate the issues in detail.

Our high level estimates indicate demand in the 2021 to 2036 period is anticipated to be as follows:

+ Residential: Demand for an additional 702-842 hectares of land for detached dwellings and 7 hectares for attached dwellings;
+ Industrial: Demand for an addition 22 hectares of industrial land demand; and
+ Centres: Demand for an additional 11 hectares of centres land.

Our comparison of demand estimates against remaining supply (based on previous studies undertaken to inform the current planning scheme) are suggestive of sufficient capacity remaining to accommodate residential, centres and industrial land demand growth to 2036. However, it is suggested the following investigations are prioritised as part of the broader planning scheme review process:

+ **Detailed review of housing need:** The Housing and Residential Development Planning Study, undertaken by Cardno HRP on behalf of Council in 2012, identified significant need to deliver semi-detached and attached product in Bundaberg Regional Council in the 2011-2031 period. However, our review of available data suggests little change in the composition of the dwelling stock in Bundaberg Regional Council, with the majority of new dwelling approvals for detached dwellings, despite the ageing demographic within the region. The assessment has also identified the current settlement pattern in Bundaberg Regional Council likely does not fully align with the intent of the planning scheme due to the following factors:
    - Higher proportion of population and dwelling growth occurring outside of the PIA, despite significant vacant and zoned residential land within the PIA throughout the region;
    - Higher proportion of growth occurring within the coastal communities as opposed to Greater Bundaberg;

  Our review of vacant supply estimates (2012 Housing Study, 2022 court appeal regarding rural residential capacity in Bundaberg Regional Council, and growth in dwellings in the 2011 to 2021 period based on Census data) indicate sufficient capacity to accommodate future demand within urban growth areas, rural residential zoned land and infill redevelopment.

  However, it is suggested a detailed assessment of housing need at the small area level is undertaken, which would likely suggest opportunity to deliver additional smaller housing product in several communities in Bundaberg Regional Council, including semi-detached and attached product. A detailed housing study would also allow for further investigation into the appropriate sequencing of residential zoned land within Bundaberg Regional Council;
+ **Detailed review of residential land supply:** As part of the Housing and Residential Development Planning Study undertaken in 2012, consideration was given to the quantum of

remaining residential capacity within Bundaberg Regional Council. The study identified significant shortfalls in broadhectare / greenfield land throughout the region, which presumably led to the rezoning of land for residential purposes under the current scheme. Presently it is understood there is a significant oversupply of vacant residential land in the Bundaberg Region (when including land within the Emerging Community Zone), which differs significantly from the outcomes of this study. This assessment has identified there has been limited semi-detached and attached residential development in Bundaberg Regional Council, with evidence of higher density zones ultimately being consumed for low density residential development.

On the other hand, significant residential development has occurred outside of the PIA, despite significant remaining residential capacity within the PIA. It is suggested more detailed investigations which identify the quantum of residential land supply by zone and community are undertaken, which include an investigation of the "development readiness" of vacant supply to inform the revised planning scheme, including advice on suggested development sequencing;

+ **Investigate opportunities to enhance development feasibility:** Whilst planning scheme settings point to a desire to increase residential densities in the Bundaberg CBD and coastal localities, the analysis suggests little semi-detached and attached dwelling development has been ultimately delivered. There are several factors which influence development feasibility, including macroeconomic factors (e.g. interest rates which affect both prospective developers and purchasers), local market conditions, construction costs and planning controls. It is suggested Council undertake further investigations to understand the local context regarding development feasibility, including whether adjustments to planning scheme settings can significantly enhance development feasibility for semi-detached and attached product in Bundaberg Regional Council, particularly within the Bundaberg CBD and coastal communities;
+ **Update centres strategy:** The retail centres hierarchy in Bundaberg Regional Council has not been reviewed since 2012 and is based on the outcomes of the Activity Centre and Industrial Land Planning Study, undertaken by Urban Economics in 2013. The demand for retail floor space in this study, which utilises projected population and households as a critical input, is based on a more optimistic outlook than current forecasts.

  This study identified the most significant quantum of vacant centres land at the Sugarland Major Centre, Moore Park Beach, Bargara, Childers and Apple Tree Creek. It is also understood a second supermarket is proposed within Bargara, which does not fully align with current scheme settings. Whilst the demand for retail floor space is likely lower than previously forecast due to trends in the retail sector more broadly (e.g. increased prevalence of online retail, consolidation of discount department stores such as Kmart), there may be opportunities to amend the Bundaberg centres hierarchy (e.g. amalgamation of neighbourhood and local centres) and identify whether the quantum of vacant centres land in certain localities is warranted (i.e. due to potential oversupply of land that will not be taken-up) or best converted to an alternative zoning (e.g. mixed use to allow for small scale retail expansion but also offer the opportunity to accommodate additional residential development). It is therefore suggested an updated centres strategy is undertaken to investigate these issues in more detail; and
+ **Update industrial strategy:** The industrial land needs of the Bundaberg region have not been investigated since 2012, as part of the Activity Centres and Industrial Land Planning Study. This study identified ~302 hectares of vacant industrial land, distributed across several

precincts, which is indicative of sufficient supply at a Council wide level. However, this study does not clarify whether this vacant land estimate adjusts for constraints, nor identifies the "development readiness" of vacant industrial land supply. It is therefore suggested an updated industrial strategy is undertaken by Council to inform the planning scheme review and to assist with the sequencing of industrial land within Bundaberg Regional Council.