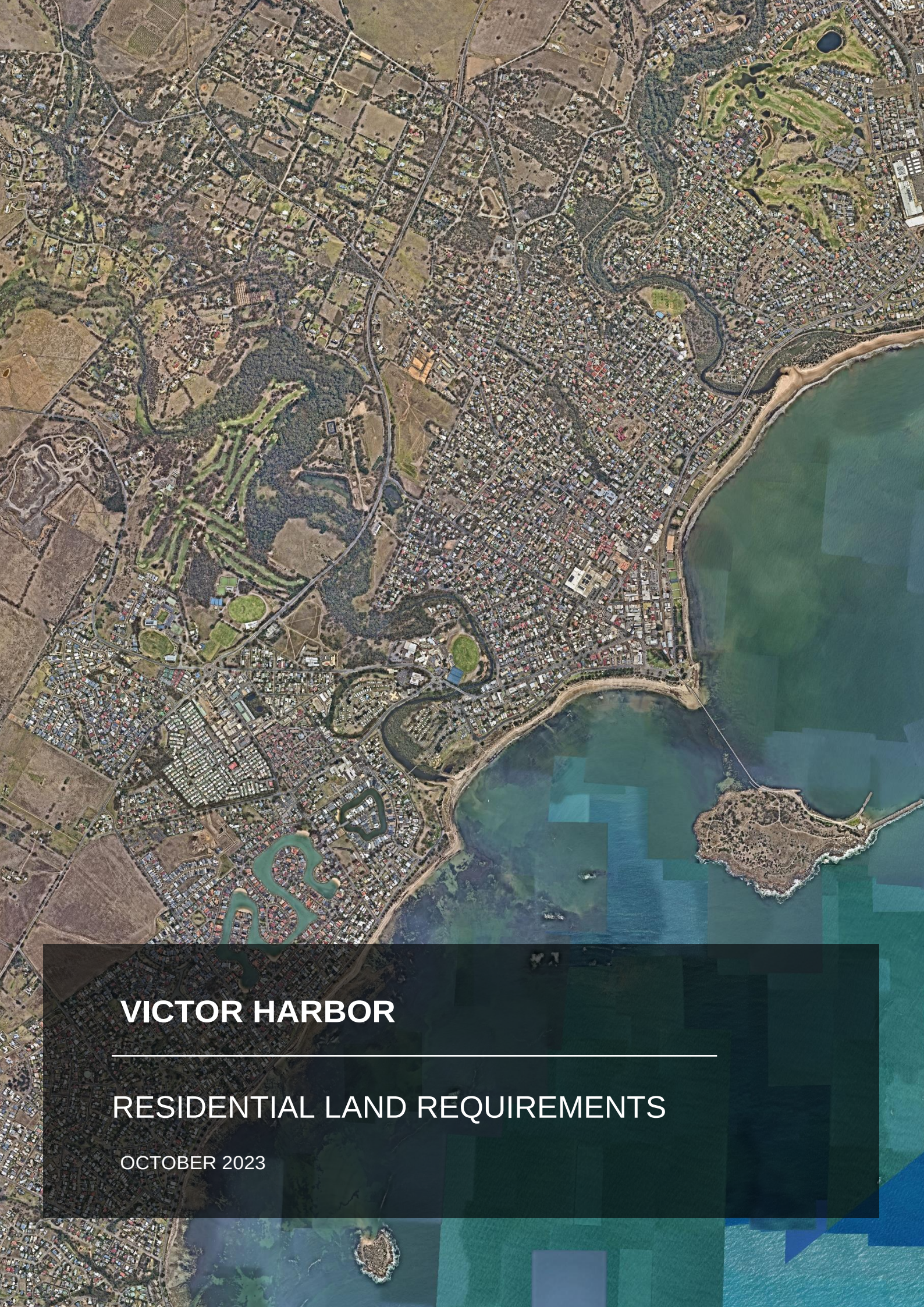


VICTOR HARBOR

RESIDENTIAL LAND REQUIREMENTS

OCTOBER 2023

CONSULTANT

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1. INTRODUCTION

The City of Victor Harbor (the Council) has experienced continual and relatively consistent population growth over recent decades. Population growth is likely to continue as the Council area remains an attractive lifestyle destination for a broad cross section of the community. This is reinforced by the Greater Adelaide Regional Plan Discussion Paper which identifies Victor Harbor as an investigation area for future residential growth.

Continued population growth has strategic planning implications given the need to accommodate future housing and employment opportunities together with associated infrastructure and services whilst protecting the environment, heritage and, creating a desirable and sustainable lifestyle for the local community.

In order to manage this growth, the Council's Urban Growth Management Strategy (UGMS) seeks to protect the environment and residents' lifestyles from the pressures of projected population growth. The UGMS was first completed in 2008 and subsequently updated in 2013 to provide an aspirational plan for Council and the community. A completely refreshed UGMS is in the process of being prepared and will be informed by numerous reports and investigations. One of these investigations is a study analysing Victor Harbor's residential land demand and supply for the next 10 to 15 years.

As a result, Future Urban Pty Ltd have been engaged by the Council to prepare a Residential Land Requirements Report to inform Council on the demand and supply for residential land within the Council area, provide recommendations for the next 10 to 15 years and a guide for future growth for the next 30 years.

In order to do so, this study:

- Undertakes a contextual analysis that considers the geographic, demographic and strategic factors that will influence growth and land supply within the City of Victor Harbor;
- Establishes a set of guiding principles for directing growth within the City of Victor Harbor which will underpin the recommendations made;
- Undertakes a review of key demand indicators and trends in relation to residential land supply with the City of Victor Harbor; and
- Identifies the existing and planned residential land supply within the City of Victor Harbor.

Based on the findings from the investigations above, this study provides recommendations for residential land supply based on various growth scenarios.

2. CONTEXTUAL ANALYSIS

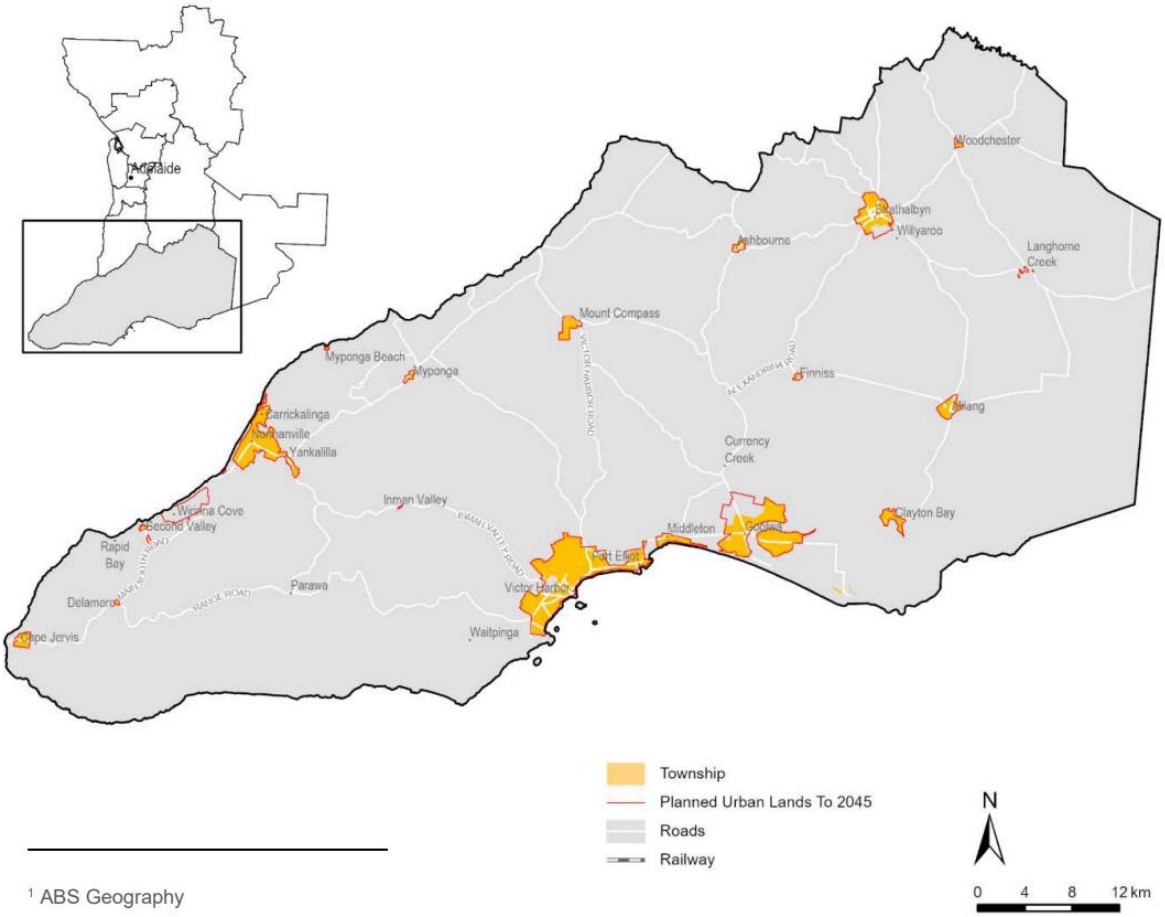
This section analyses the geographic, demographic, and strategic context of the City of Victor Harbor in order to establish the guiding principles for managing growth which will inform the recommendations of this study.

2.1 Geographic Context

The City of Victor Harbor is located on the Fleurieu Peninsula, approximately 84 kilometres south of the Adelaide Central Business District. The Ramindjeri and Ngarrindjeri Aboriginal people are the traditional owners of the land.

For the purposes of strategic planning, the City of Victor Harbor is situated within Greater Adelaide Region and with respect to land supply, Victor Harbor is situated within the Fleurieu 'sub-region'[1] of Greater Adelaide, shown in Figure 2.1 below. Victor Harbor shares this sub-region with the Alexandrina Council to the east and the District Council of Yankalilla to the north and west. The Southern Ocean (Encounter Bay) forms the southern edge of both the Peninsula and the City of Victor Harbor.

Figure 2.1 *Fleurieu Region (Source: Greenfield Land Supply Report[2])*



[1] ABS Geography

[1] Please note that references to sub-region within this report, are not intended to refer to subregions per section 6 of the *Planning Development and Infrastructure Act 2016*, but rather is an informal reference to part of a recognised region.
[2] Available here: https://plan.sa.gov.au/__data/assets/pdf_file/0005/830984/Land_Supply_Report_for_Greater_Adelaide_-_Greenfield.pdf

The Victor Harbor township is the only Regional Centre within the Fleurieu Region (as designated by the 30 Year Plan for Greater Adelaide) and is supported by two District Centres at Goolwa to the east (18 kilometres by car) and Strathalbyn to the north east (48 kilometres by car)[3]. Accordingly, Victor Harbor provides a range of services, functions, and facilities in the following sectors: retail, administration, government, tourism, culture and entertainment, community, business, education, and recreation.

The City of Victor Harbor is the second most populous Council area within the Fleurieu Region behind the Alexandrina Council, accounting for approximately 31.8% of the total region population in 2021. This is predicted to slightly decline by 2036, given the anticipated growth of multiple townships within the Alexandrina Council area, particularly Goolwa. As shown in Table 2.1 below, Alexandrina Council is forecast to grow by 5,673 people between 2021 and 2036 whilst the City of Victor Harbor is forecast to grow by 2,635 people over the same period. These population projections are currently being reviewed by the Department for Trade and Investment (DTI) and are expected to be released in 2023.

In the interim, DTI have released population projections for the whole Fleurieu region, which anticipate that the region will grow at a rate of 1.9% (medium growth) to 2.3% (high growth) between 2021 and 2041[4]. This is notably higher than the 1.1% predicted for the City of Victor Harbor and the Victor Harbor township when similar projections were prepared in 2019.

Table 2.1 *Regional Settlement Patterns[5]*

Region	2016 Population (% of Region)	2021 Population (% of Region)	2036 Population[6] (% of Region)
Victor Harbor Township[7]	**14,378 (31.5%)**	**15,847 (31.3%)**	18,503
Goolwa-Middleton-Port Elliot-Hindmarsh Island (SA2)	11,126 (24.4%)	12,516 (24.7%)	14,112
Strathalbyn (SA2)	7,096 (15.5%)	7,871 (15.5%)	9,951
Mount Compass[8]	1,119 (2.4%)	1,232 (2.4%)	
Yankalilla (SA2)	5,732 (12.5%)	795 (1.6%)	7,490
Normanville-Carrickalinga[3]	1,906 (4.2%)	2,262 (4.5%)	
Victor Harbor Council area	**14,665 (32.1%)**	**16,139 (31.8%)**	**18,774 (31.3%)**
Alexandrina Council area	25,873 (56.6%)	28,730 (56.7%)	34,403 (57.3%)
Yankalilla Council area	5,159 (11.3%)	5,834 (11.5%)	6,861 (11.4%)
Total Regional Population	**45,679**	**50,703**	**60,038**
Additional growth based on 2021 data[9]			**+ 5,577 – 9,071 people**
Total Regional Population based on 2021 data			**65,615 (medium growth) to 69,109 (high growth)**

[3] This centre hierarchy is outlined in the 30 Year Plan for Greater Adelaide, available here: https://livingadelaide.sa.gov.au/__data/assets/pdf_file/0003/319809/The_30-Year_Plan_for_Greater_Adelaide.pdf
[4] Based on the Department projections released in August 2023, available here: https://plan.sa.gov.au/__data/assets/excel_doc/0007/1236256/South-Australia-and-regional-projections-summary.xls
[5] ABS 2016 & 2021 Census of Population and Housing, 2016 and Department for Trade and Investment Population Projections
[6] Projections based on 2016 data. Projections derived from 2021 data not available at time of writing.
[7] Defined as the Victor Harbor Statistical Area Level 2, a geographical boundary defined by the Australian Bureau of Statistics. Refer section 4.1 for map
[8] Geographical Type: Urban Centres and Localities
[9] Projections based on 2021 data, prepared by the Department for Trade and Investment, available here: https://plan.sa.gov.au/state_snapshot/population/population-projections

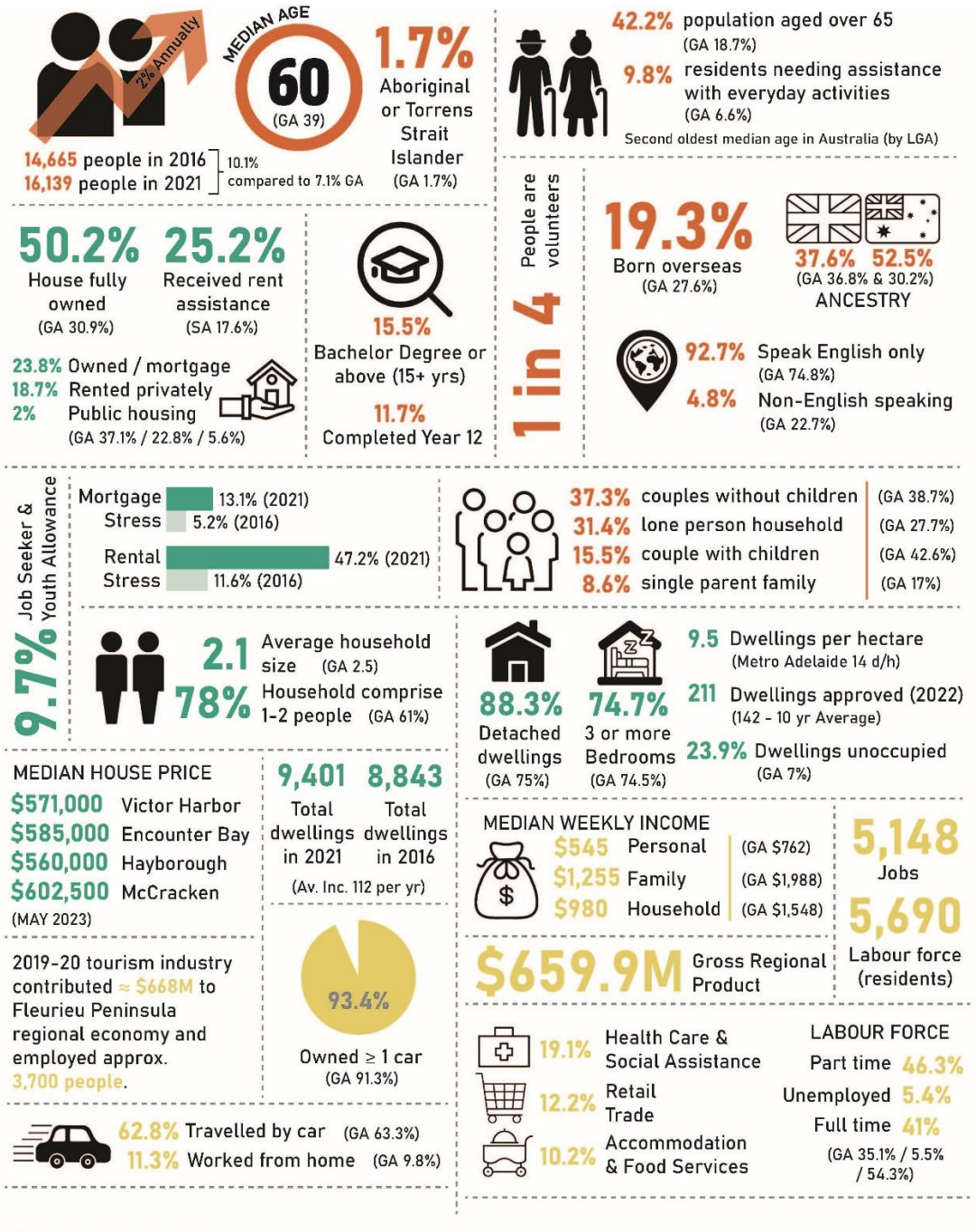
The Victor Harbor urban area accounts for 98.1% of the Council area's total population (Table 2.1), and generally comprises the suburbs of Victor Harbor, Encounter Bay, McCracken and Hayborough. The remaining land within the Council area is categorised as rural and is quite scenic, characterised by rolling hills and native vegetation.

The predominant land use within the urban area is low-density residential. The gross dwelling density for Victor Harbor is 9.5 dwellings per hectare. There are pockets of commercial, retail, and industrial uses throughout the urban area and significant areas of conservation and open space.

2.2 Demographic Context

Figure 2.2 below provides a snapshot of the social and economic profile for the City of Victor Harbor.

Figure 2.2 *Social and Economic Snapshot*



From the above, it is evident that:

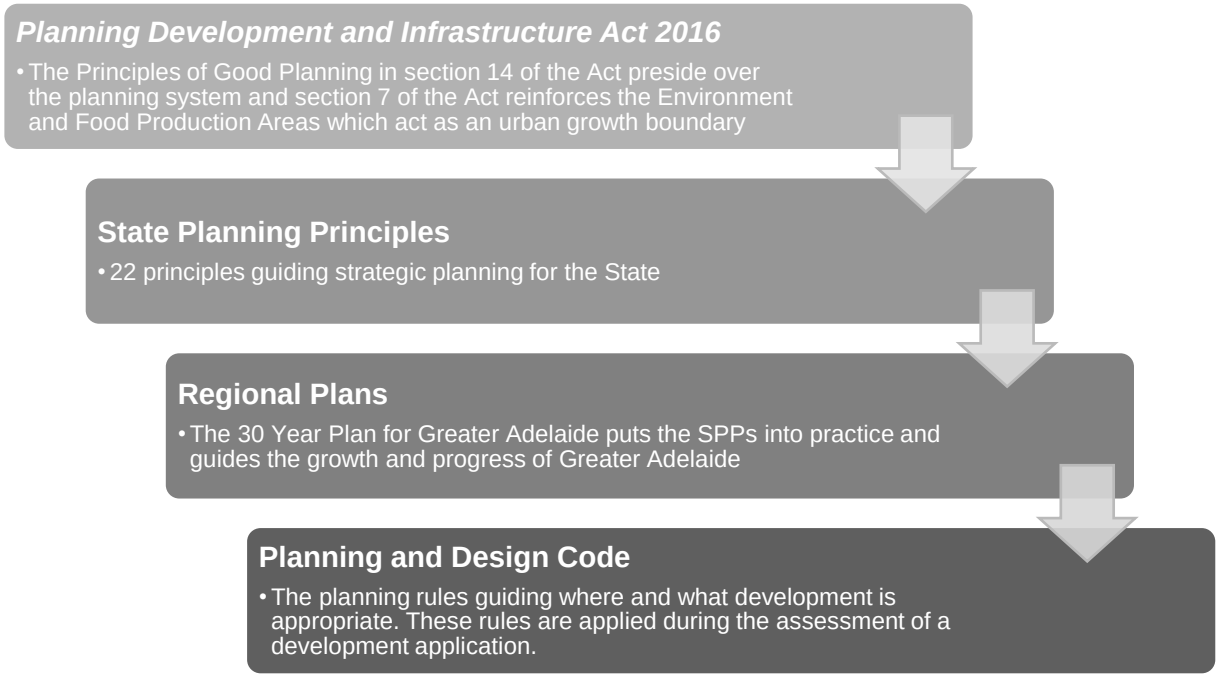
- Victor Harbor has been experiencing strong population growth between 2016 and 2021 (annual rate of 2%);
- The proportion of people over 65 is considerably larger than Greater Adelaide (42.2% compared to 18.7%);
- The median household size is smaller than Greater Adelaide (2.1 persons between 2011 and 2021)[10]; and
- More than 1 in 10 households were experiencing housing stress in 2021, which has nearly tripled since 2016. Noting that interest rates have continued to rise since 2022, it is possible that the number of households experiencing housing stress has continued to increase.

Demographic trends, and their influence on demand for residential land are considered in more detail in section 4.3 of this report.

2.3 Strategic Context

South Australia's planning system has several layers which influence how the development of the State occurs. The hierarchy of these layers is shown in Figure 2.3 below.

Figure 2.3 *South Australia's Planning System*



The relevance of the above strategic documents to residential land supply within the City of Victor Harbor is considered under the relevant headings below.

Similarly, the City of Victor Harbor has several strategic documents which guide Council priorities and how it proposes to manage the evolution of the Council area. These documents include the City of Victor Harbor Community Plan 2030, the UGMS and the Economic Development Strategy 2020 - 2030. These documents are also considered below.

[10] Please note that these has been a subtle increase in the proportion of lone person households within the Council area, which is discussed further in section 4 of this report.

2.3.2 Planning Development and Infrastructure Act 2016

Section 14 of the *Planning Development and Infrastructure Act 2016* the (Act) sets out the principles of good planning which preside over South Australia's planning system. The following principles are most relevant to planning for residential land supply:

> *(b) urban renewal principles as follows:*
>
> > *(i) preference should be given to accommodating expected future growth of cities and towns through the logical consolidation and redevelopment of existing urban areas;*
> >
> > *(ii) the encroachment of urban areas on areas of rural, landscape or environmental significance is to be avoided other than in exceptional circumstances;*
> >
> > *(iii) urban renewal should seek to make the best use (as appropriate) of underlying or latent potential associated with land, buildings and infrastructure;*
>
> *(c) high-quality design principles as follows:*
>
> > *(v) cities and towns should be planned and designed to be well-connected in ways that facilitate the safe, secure and effective movement of people within and through them;*

In relation to (b)(ii) above, it is worth noting that section 7 of the Act provides further guidance about urban encroachment and what may be considered 'exceptional circumstances' warranting urban encroachment.

Areas of rural, landscape and environmental significance are protected by the Environment and Food Production Area (EFPAs) which acts as an urban growth boundary around urban areas and townships in Greater Adelaide, including the City of Victor Harbor[11]. Within the EFPA, land cannot be subdivided for residential purposes and therefore, the EFPA boundary would require amendment if growth was to occur outside of this boundary. Figure 2.4 shows the extent of the EFPA around the Victor Harbor township.

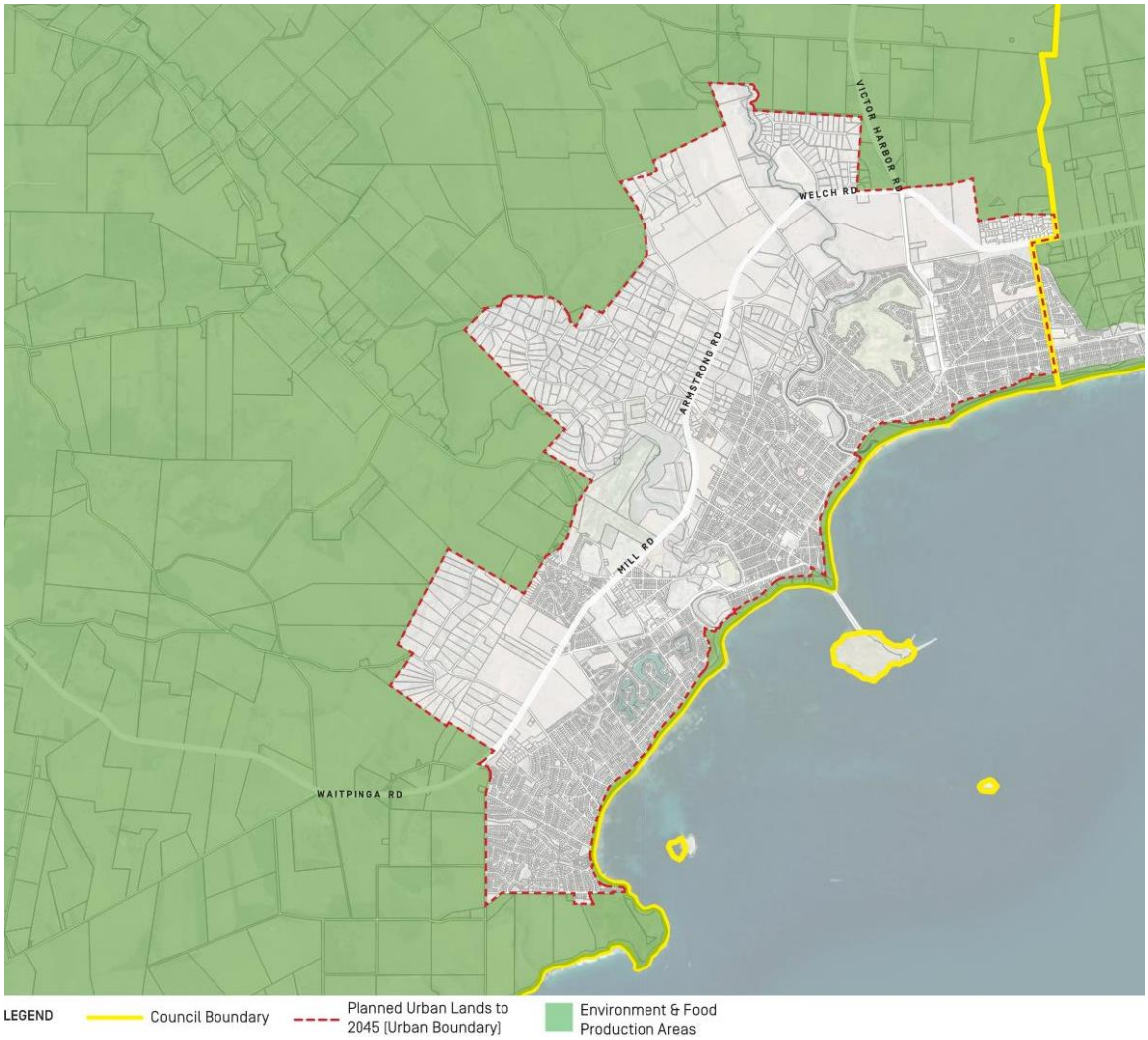
In order to vary the EFPA, the State Planning Commission must be satisfied:

> *(a) that—*
>
> > *(i) an area or areas within Greater Adelaide outside environment and food production areas are unable to support the principle of urban renewal and consolidation of existing urban areas; and,*
> >
> > *(ii) adequate provision cannot be made within Greater Adelaide outside environment and food production areas to accommodate housing and employment growth over the longer term (being at least a 15 year period); or*
>
> *(b) that the variation is trivial in nature and will address a recognised anomaly.*

Accordingly, an inability to meet housing supply within the next 15 years is an exceptional circumstance that warrants encroachment into the EFPA. Notwithstanding, it is pertinent to highlight that such would require a review of land supply for Greater Adelaide, or a region within Greater Adelaide, at a scale greater than a singular Council. This is undertaken every 5 years by the State Government and is next due to occur in 2027.

[11] A copy of the current Environment and Food Production Areas map is available here: https://plan.sa.gov.au/resources/planning/environment_and_food_production_areas

Figure 2.4 *Environment and Food Production Area Boundary*



2.3.3 State Planning Policies

The State Planning Policies (SPPs) set out the State's overarching goals and requirements for the planning system.

SPPs 1 'Integrated Planning' and 6 'Housing Supply and Diversity' are the most relevant when considering land supply. Their overarching objectives and most relevant policies are provided in Table 2.2 below.

Table 2.2 *Relevant State Planning Policies*

1. Integrated Planning		
To apply the principles of integrated planning to shape cities and regions in a way that enhances our liveability, economic prosperity and sustainable future.		
SPP 1 Policies	**1.1**	An adequate supply of land (well serviced by infrastructure) is available that can accommodate housing and employment growth over the relevant forecast period.
	1.4	Plan growth in areas of the state that is connected to and integrated with, existing and proposed public transport routes, infrastructure, services and employment lands.

6. Housing Supply and Diversity To promote the development of a well-serviced and sustainable housing and land choices where and when required.		
SPP 6 Policies	**6.1**	A well-designed, diverse and affordable housing supply that responds to population growth and projections and the evolving demographic, social, cultural and lifestyle needs of our current and future communities.
	6.2	The timely supply of land for housing that is integrated with, and connected to, the range of services, facilities, public transport and infrastructure needed to support liveable and walkable neighbourhoods.
	6.4	The growth of regional centres and towns within the existing footprint or outside towns where there is demonstrated demand and the land is serviced with infrastructure.
	6.5	Locate higher density residential and mixed-use development in strategic centres and transport corridor catchments to achieve the densities required to support the economic viability of these locations and the public transport services.
	6.10	Limit the establishment of rural living allotments in areas that impact on the future expansion of townships and result in the inefficient delivery of infrastructure and social services.
	6.11	Residential development that does not fragment valuable primary production land, create land use conflicts or encroaches on sensitive environmental assets and places of high landscape value.

It is evident from the above that land supply for housing should account for growth and that growth areas should be well serviced. In addition, it emphasises the need to consider urban consolidation in order to meet growth.

2.3.4 30 Year Plan for Greater Adelaide

The 30 Year Plan for Greater Adelaide (2017 Update) is the Regional Plan which puts the SPPs into practice and guides the growth and progress of Greater Adelaide. This Plan is currently being reviewed and is likely to be replaced in 2025.

As part of the review of the Regional Plan, a Discussion Paper has been released for feedback. This Discussion Paper identifies that there is sufficient land supply within Greater Adelaide for the next 15 years and that new growth areas will be required to accommodate approximately 100,000 homes over the next 16 to 30 years. Victor Harbor is one of the seven areas identified for further investigation in order to accommodate these new homes.

Notwithstanding the above, the current Regional Plan still provides relevant guidance with respect to commercial and employment land supply. In particular, Policy 46 anticipates that '*an adequate land supply is available to accommodate housing and employment growth over the longer term (at least a 15 year supply)*' is planned for. It is anticipated that the future Regional Plan will include a similar objective.

In order to achieve a minimum of 15 years zoned supply, the current Regional Plan has identified areas for growth for the next 22 years, until 2045. More detail on the planned supply for the City of Victor Harbor and surrounds is provided in Section 5 of this report.

In addition to the above, Target 1.2 of the Plan anticipates that '*90% of all new housing in Outer Adelaide will be built in established townships and designated urban development areas',* highlighting the preference for urban consolidation, over further encroachment into rural areas. This sentiment is echoed for metropolitan Greater Adelaide with a goal of 85% of new housing being within existing urban areas.

2.3.5 Planning and Design Code

The Planning and Design Code provides the 'planning rule book' which guides the assessment of development applications. It is supported by the SA Planning and Property Atlas (SAPPA) which is an electronic mapping system that outlines all of the Zone, Subzone and Overlay boundaries within the State, guiding what types of development are suitable in which locations (i.e. residential development in neighbourhood type zones and industrial development in employment type zones).

Zoning within the township of Victor Harbor is quite diverse. With respect to planning for residential land supply, section 5 of this report will detail the supply within the existing residential/neighbourhood zones and the planned supply within the Deferred Urban Zone. If additional land is needed outside of the existing neighbourhood type zones, it will be necessary to rezone land for this purpose.

2.3.6 City of Victor Harbor Community Plan 2030

The City of Victor Harbor Community Plan 2030 is the Council's guiding strategic document that outlines the community's aspirations for the future.

In relation to land supply, aspiration three is most relevant which envisages that the Council '*manage growth and change responsibly'.* The corresponding strategies and priorities do not specifically reference land supply planning. However, the following references are important to note:

- Aspiration three's fourth strategy aims to *'plan for sustainable development, residential amenity and security of prime agricultural land'* suggesting that urban encroachment should be minimised where possible; and
- The first priority is to review and update the City of Victor Harbor Urban Growth Management Strategy (UGMS), which will guide the locations of future residential land, if needed.

Whilst not directly related to land supply, it is important to also acknowledge the Community Plan's Aspiration Four which seeks the protection of the environment. None of the strategies or actions reference land supply or growth specifically, however it is evident that planning for growth should not undermine the area's natural environment and landscape character. This was emphasised by members of the community during the Community Plan consultation, noting that the following was acknowledged in the Plan: '*Sustainable development is important to protect the town setting, landscapes and 'areas of outstanding beauty''.*

2.3.7 Council's Urban Growth Management Strategy (UGMS)

The UGMS is the City of Victor Harbor's long-term strategic document, providing a set of targeted strategies and implementation measures to achieve Council's vision and direct the sustainable growth of Victor Harbor to the year 2030. The UGMS was first completed in 2008 and subsequently updated in 2013 to provide an aspirational plan for Council and the community. A completely refreshed UGMS is in the process of being prepared and will be informed by numerous reports and investigations.

The current UGMS has three overarching objectives which are:

1. A strong economy and supportive business environment;
2. The sustainable provision of physical infrastructure and community services; and
3. Environment and lifestyle protected against the pressures of projected population growth

All three objectives have corresponding strategies and actions that are relevant to residential land supply. These are summarised in Table 2.3 below.

Table 2.3 *Relevant Urban Growth Management Strategy Objectives, Strategies and Actions*

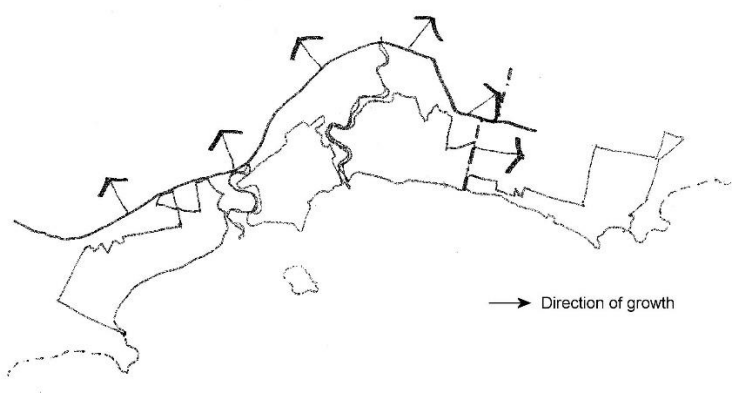
Objective	Strategies	Actions
1. A strong economy and supportive business environment	1.6 Plan for appropriate housing stock and diversity to meet current and projected needs 1.7 Encourage an increase in the proportion of permanent residents	1.1.10 Ensure increased residential development within the Town Centre is balanced with the ongoing operation of existing businesses 1.3.2 Increase housing densities within and adjacent to Centres to improve accessibility to service and provide critical mass for public transport networks, subject to impact on retail expansion and utilities capacity 1.6.4 Sequence and co-ordinate residential land to minimize servicing costs and maximise access to community infrastructure and social services 1.6.5 Recognise and provide required buffer distances between new development and wastewater treatment plants and other critical infrastructure 1.6.9 Identify areas in close proximity to key transport, business, community and recreational nodes and investigate rezoning for increased densities 1.6.12 Identify and redevelop areas of mixed character with small lot infill development
2. The sustainable provision of physical infrastructure and community services	2.1 Stage release of residential land ahead of growth and in line with staged services based on detailed analysis of supply and demand	2.1.1 Coordinate the orderly release of land and economic provision of services 2.1.2 Amend Development Plan[12] to require smaller maximum allotment sizes in areas best suited to increased densities

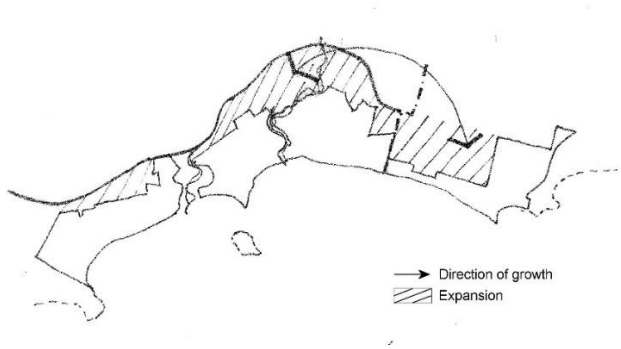
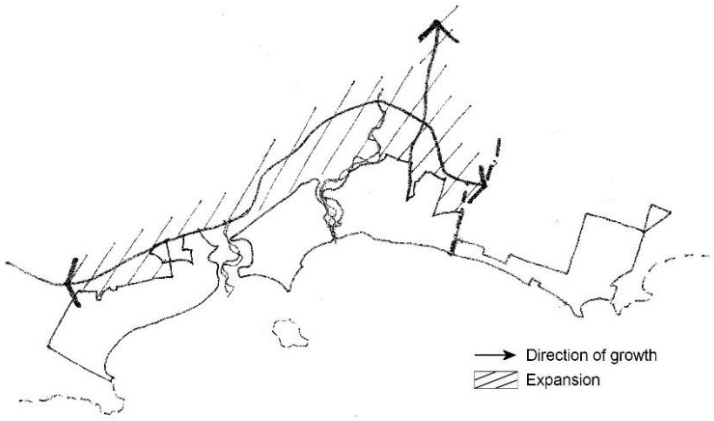
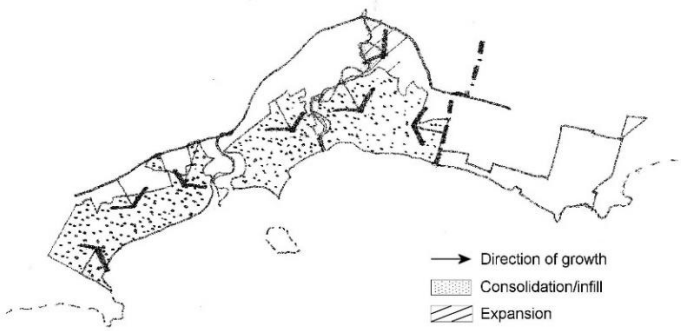
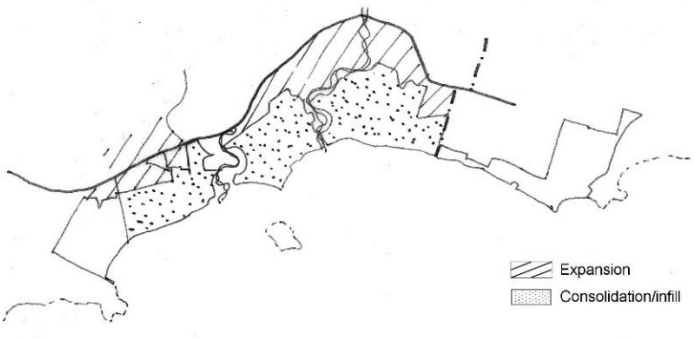
[12] Note that the Development Plan has since been replaced by the Planning and Design Code. However, these actions referring to the Development Plan show the intent to create policy to manage the impact of development on the environment, which starts at the strategic level.

Objective	Strategies	Actions
3. Environment and lifestyle protected against the pressures of projected population growth	3.1 Protect ecological values and biodiversity 3.2 Identify and protect, heritage landscape and townscape values 3.4 Plan for appropriately designed and located, mixed density housing which caters to the needs of the community 3.6 Encourage development controls which reflect principles of Ecologically Sustainable Development	3.1.1 Implement ecologically sustainable urban design and development and encourage a compact urban form to reduce ecological footprint through changes to Development Plans[10] and information guides 3.1.11 Incorporate biodiversity conversation measures in the Development Plan[10] 3.2.1 Incorporate relevant findings of the Victor Harbor Landscape Amenity Report into the Victor Harbor Development Plan. 3.2.2 Identify areas of unique or specific built form character and protect through a Development Plan Amendment 3.4.1 Implement the urban growth boundary for Victor Harbor as detailed on the UGMS Structure Plan 3.4.2 Consider strategies or incentives to encourage the timely development of vacant allotments

For context, it is also important to note that the UGMS contemplated five possible physical growth scenarios for the Council area which would each result in a different built form outcome and different urban area boundary. Table 2.4 outlines these four scenarios.

Table 2.4 *Summary of Possible Physical Growth Scenarios from the Urban Growth Management Strategy*

Scenario	Description	Diagram
1	Continuation of the existing approach of growth in all directions, encroaching on rural land and limiting infill and consolidation	

Scenario	Description	Diagram
2	Growth directed towards Port Elliot	
3	Growth is concentrated along major access roads into Victor Harbor	
4	Consolidation and infill with growth only occurring within the existing township boundaries and Zones	
5	Directed growth with a mix of minor expansion into rural areas and consolidation and infill	

Scenario 5 was selected as the preferred growth scenario and was considered to best support the Council's vision through the sensitive and selective consolidation and infill of the existing township, together with efficiently staged and coordinated expansion of the town.

2.3.8 Economic Development Strategy 2020- 2030

The City of Victor Harbor's Economic Development Strategy provides a blueprint for a sustainable future economy. This strategy considers the context of Victor Harbor's ageing population and highlights the challenges such presents to the local economy including:

- Increased dependency on the government and health services; and
- A population with less discretionary income with fewer people in the workforce, noting that in 2020 the weekly household income was $430 below the state average.

In relation to residential land supply, the strategy '*focuses on presenting Victor Harbor as a destination of choice for young families and those currently active in the work force'.* In particular, measures of success for the strategy include:

- Increasing the number of residents choosing to live in Victor Harbor while commuting to work outside of the area; and
- Increasing the number of young professionals and their families choosing to live in Victor Harbor.

Accordingly, should the various actions within the Strategy be successful, such would stimulate additional demand for residential land within the Council area.

2.4 Summary

The contextual analysis has considered the geographic, demographic and strategic context for the City of Victor Harbor as it relates to residential land supply. In summary, the following matters are most relevant to residential land supply within the City of Victor Harbor:

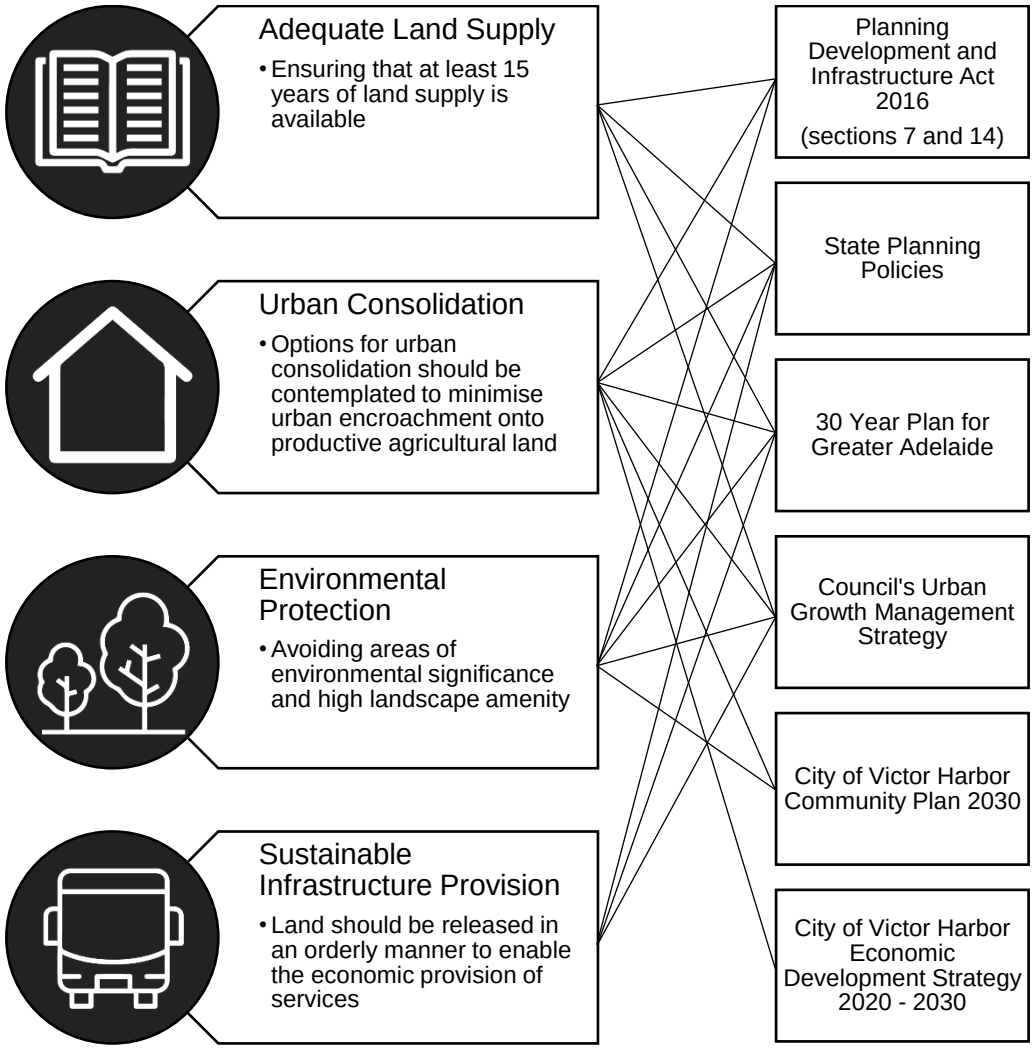
- The City of Victor Harbor is the only Regional Centre in the Fleurieu region and is likely to continue to be a place that people choose to live. This is supported by the consistent population growth that the area has experienced and is forecast to continue;
- The population is ageing, however the average number of persons per household has remained consistent, suggesting that the ageing demographic alone isn't increasing pressure on housing supply (i.e. as the proportion of lone households increases, an area requires more housing and residential land to accommodate the same number of people);
- To align with the State's strategic documents, planning for growth should balance:
    a) Minimising urban encroachment onto productive rural land; and
    b) Ensuring that there is an adequate supply of land for residential and employment growth for at least the next 15 years.
- To align with the City of Victor Harbor's strategic documents, in addition to 'a' and 'b' above, planning for growth should:
    a) Be cognisant of the Council's desire for sustainable growth, particularly in relation to increasing the local work force and number of permanent residents; and
    b) Ensure that the environment and lifestyle is protected.

3. GUIDING PRINCIPLES FOR GROWTH

This study will inform future preparations of a new strategic direction for the City of Victor Harbor and in turn, will be used to guide the growth of the township. Accordingly, it is important to establish a set of guiding principles which underpin any recommendations contained within this report. These guiding principles have been formulated from the key themes identified in the State and local strategic documents referred to in the contextual analysis above.

These guiding principles are summarised in Figure 3.1.

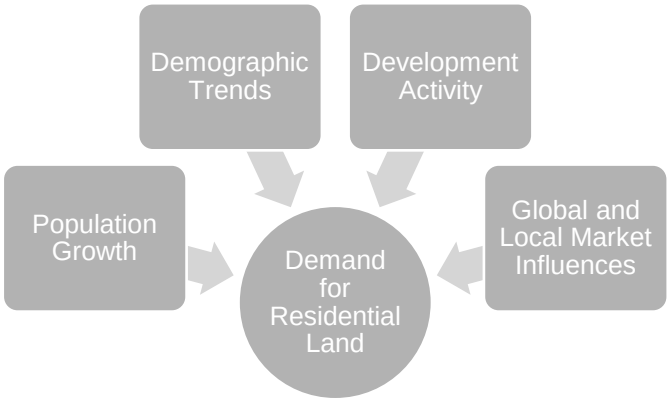
Figure 3.1 *Guiding Principles for Selecting Growth Areas and alignment with Strategic Documents*



4. DEMAND FOR RESIDENTIAL LAND

4.1 Data Selection for Demand Analysis

Four factors influence and/or indicate demand for residential land. These include:



Each of these factors are considered below and have been utilised to inform a future population and housing model that forecasts demand for dwellings for the next 10 to 15 years. This model is detailed in section 4.6 of this report. This future population model, and the demand data referred to in this report, were prepared as part of a Council Area Profile prepared for Council by Future Urban, and provided under separate cover.

For ease of reference, data has been reviewed for both the Victor Harbor township (represented by the Statistical Area 2 boundaries prescribed by the Australian Bureau of Statistics) shown in Figure 4.1 below and the City of Victor Harbor Council area, shown in Figure 4.2, unless otherwise stated.

Figure 4.1 *Statistical Area 2 boundaries determined by the Australian Bureau of Statistics*

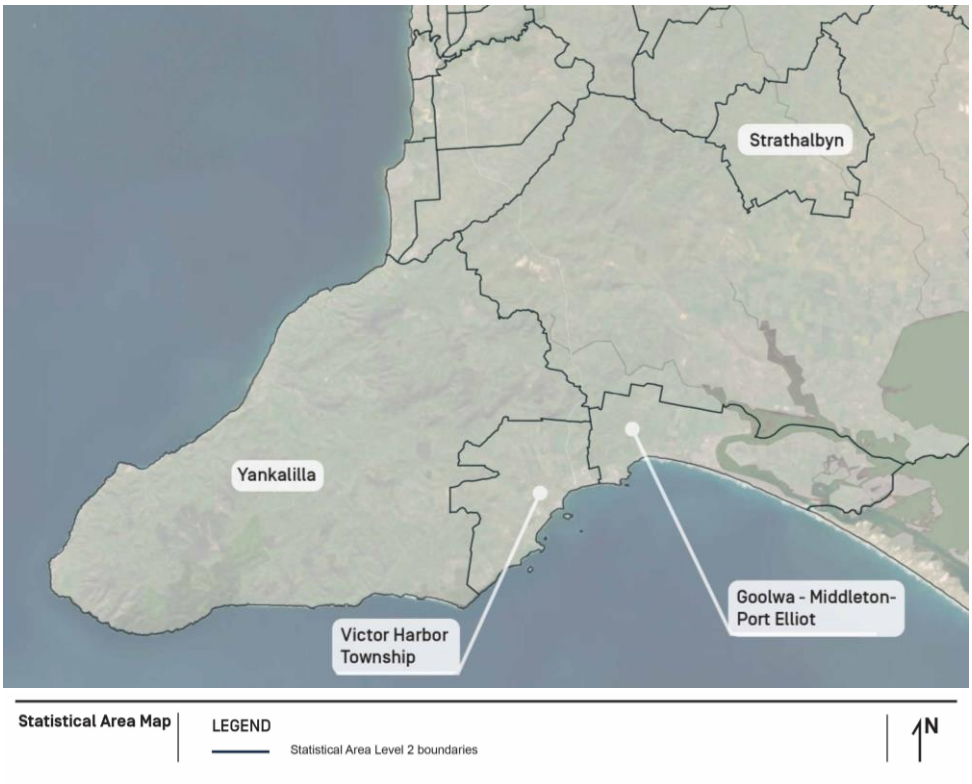


Figure 4.2 *Council Area Boundaries*



4.2 Population Growth

4.2.1 Recorded Growth

At the 2021 Census, the resident population of the Victor Harbor township was 15,847 people. The population of the City of Victor Harbor Local Government Area was 16,139, indicating that the Victor Harbor urban area accounts for 98.1% of the Council area's total population.

The City of Victor Harbor's population grew by 1474 persons, or 10.1% between the 2016 and 2021 Census periods. This represents an average annual growth rate of 2.02%. This growth rate is greater than the preceding 5 years; between 2011 and 2016 Victor Harbor grew by 822 people or 1.19% annually.

By comparison, Greater Adelaide[13] grew by 91,576 persons between 2016 and 2021, which is 7.1% or 1.4% annually. Consequently, the Fleurieu Peninsula is experiencing faster growth as compared to Greater Adelaide. This has been a long-term trend with recent additional impetus supported by evidence of changed lifestyle choices post COVID-19.

4.2.2 Government-Projected Growth

In relation to population projections, the Department of Planning, Transport and Infrastructure (DPTI, now referred to as the Department of Trade and Investment) have projected that the City of Victor Harbor (LGA) will grow to approximately 18,774 people by 2036 and that the Victor Harbor township will grow to 18,503 people. This represents an average annual growth rate of 1.1% (as shown in Table 4.1), similar to what was experienced between 2011 and 2016. However, this is notably less than the growth experienced between 2016 and 2021. This is likely due to the fact that the below projections were undertaken in 2019 and did not anticipate rapid growth post 2016.

[13] Geographical type: Greater Capital City Statistical Areas

The above projections also suggest that there will be a very subtle increase in people choosing to reside in the Victor Harbor urban area which may accommodate 98.6% of the population (an increase of 0.5% from 2021).

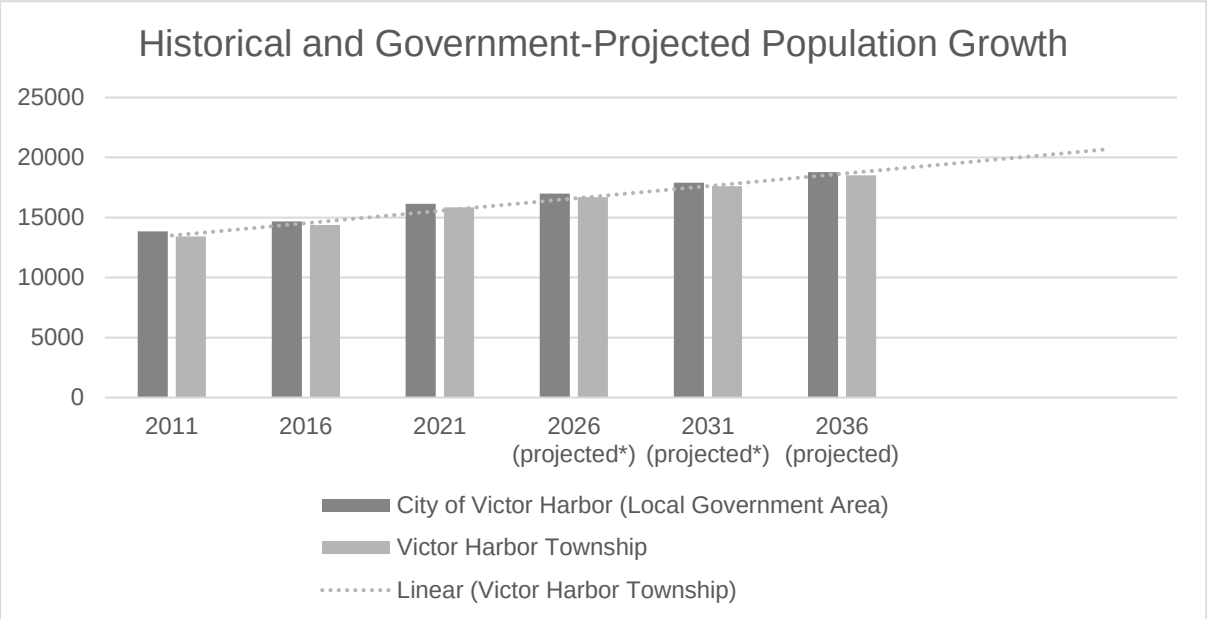
The historical and projected population growth for both the City of Victor Harbor the Victor Harbor township is summarised in Figure 4.3.

These growth figures are currently being reviewed by DIT are expected to be revised in the near future (2023). In the interim, DIT have released population projections for the whole Fleurieu region, which anticipate that the region will grow at a rate of 1.9% (medium growth) to 2.3% (high growth) between 2021 and 2041[14]. This is notably higher than the 1.1% predicted for the City of Victor Harbor and the Victor Harbor township when similar projections were prepared in 2019.

Table 4.1 *Projected Growth for Victor Harbor*

Region	2021 Population	2036 Population	Growth per Annum	
			People	Rate (%)
Victor Harbor Township[15]	15,847	18,503	177	1.1%
City of Victor Harbor (LGA)	16,139	18,774	176	1.1%

Figure 4.3 *Population Growth*



[14] Based on the Department projections released in August 2023, available here: https://plan.sa.gov.au/__data/assets/excel_doc/0007/1236256/South-Australia-and-regional-projections-summary.xls

[15] Defined as the Victor Harbor Statistical Area Level 2, a geographical boundary defined by the Australian Bureau of Statistics. (see Figure 4.1)

Implications for Residential Land Supply

- The population has continued to grow at a rate of between 1.19% and 2.02% since 2011.
- In 2019, the State Government projected that the City of Victor Harbor will continue to grow at a rate of 1.1% per annum and in 2023, the State Government forecast that the Fleurieu region will grow at a rate of 1.9% (medium growth) to 2.3% (high growth) between 2021 and 2041.
- Residential land supply should account for this growth and factor in the recent regional growth projections prepared by the State Government.
- There will be a subtle increase in people residing in the Victor Harbor urban area.

4.3 Demographic Trends

4.3.1 Age

At the 2021 Census, the median age of the City of Victor Harbor population was 60, and there were 6,813 people over the age of 65, accounting for 42.2% of the city's population. In comparison, across metropolitan Greater Adelaide[16], the median age was 39 and 18.7% of the population were aged over 65. This indicates that Victor Harbor already has twice the proportion of older people as compared to Greater Adelaide.

The age profile and steady ageing of Victor Harbor's population has been evident for some time. This trend is continuing, however, with the median age increasing from 56 to 60 between the 2011 and 2021 Census. Similarly, the proportion of the population aged over 65 increased from 34.3% of the total population at the 2011 Census to 42.2% in 2021.

Between 2016 and 2021, the age group which experienced the largest increase were seniors aged between 70 and 84, which increased by 1,016. Some growth in families and school aged children (89 additional people aged 39 to 49 and 90 people aged 12 to 17) was experienced over the same period, however, this growth was not significant enough to offset the effects of the ageing population.

Implications for Residential Land Supply

- The population is ageing and such is likely to increase demand for smaller housing and/or supported accommodation. In addition, it is likely to increase the number of lone person households and reduce household sizes, creating demand for additional housing.
- Housing strategy should plan for diversity of household types.

4.3.2 Household Composition

Compared to South Australia as a whole, Victor Harbor households contain a very high proportion of couples without children (37.3%) and lone persons (31.4%), as shown in Figure 4.4.

These percentages are also higher in comparison to Greater Adelaide where couples without children comprise 25.3% of households and lone persons comprise 26.8%. This correlates with the age profile of the population and the relatively high median age.

Families comprising couples with children account for 15.5% and one parent families 8.6%, compared to 28.6% and 11.3% respectively for Greater Adelaide. These numbers remained steady between 2021 and 2016.

[16] Defined as per the ABS definition of the 'Greater Capital City Statistical Area'.

Figure 4.4 *Household Composition*

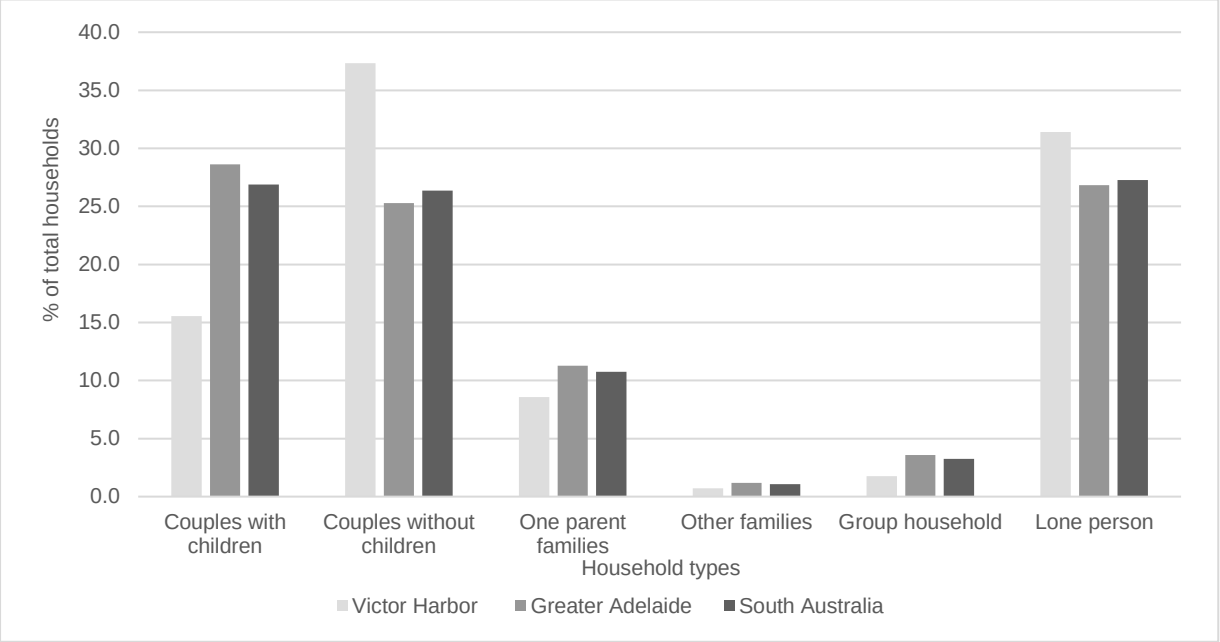
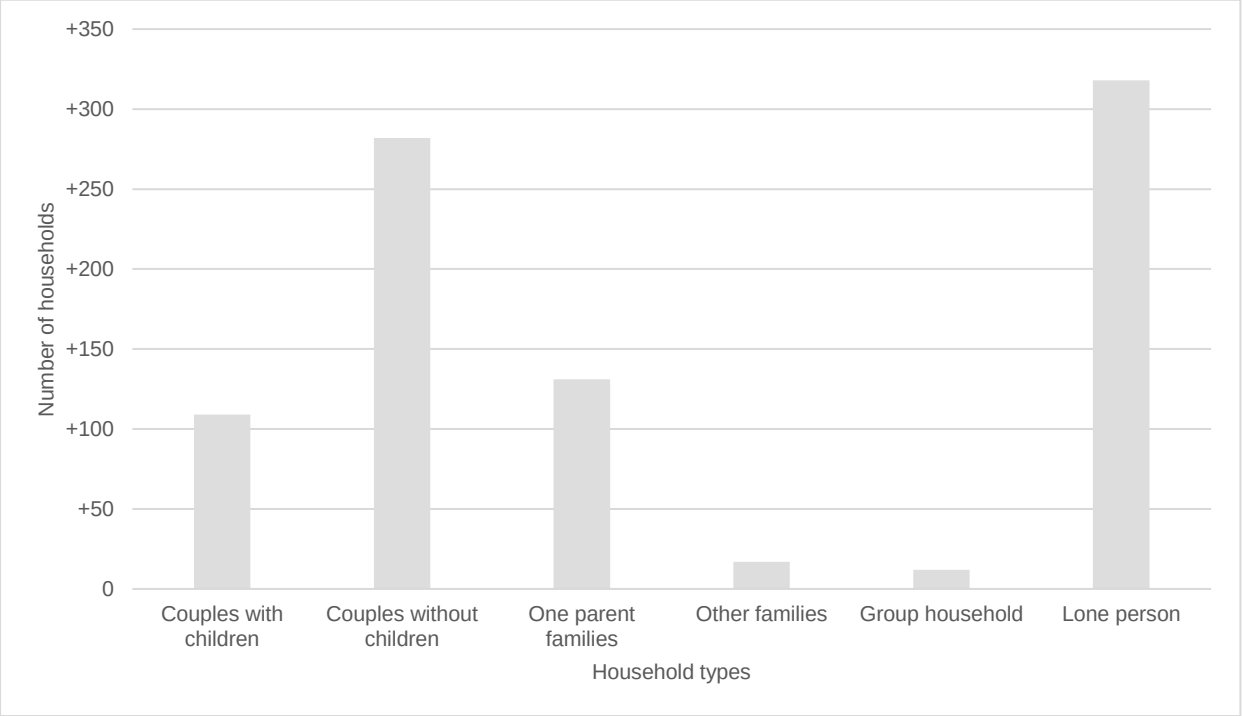


Figure 4.5 below summarises changes in household types in the Council area over the five years between 2016 and 2021, demonstrating the significant increase in couples without children and lone person households. This further emphasises the age and household demographics which reside in Victor Harbor.

Figure 4.5 *Change in household types in the City of Victor Harbor between 2016 and 2021*



Implications for Residential Land Supply

- The increase in couples without children and lone person households decreases household sizes and in turn, results in demand for additional housing (i.e., increases the number of houses required to accommodate the same number of people as household sizes are smaller).
- Housing strategy should plan for diversity of household types.

4.3.3 Household Size

Despite the increase in couples without children and lone person households between 2016 and 2021, there has been no change to the average household size within either the Victor Harbor township or the City of Victor Harbor (Council area) since 2011, which has remained consistent at 2.1 persons per household. This is slightly lower than the average household size for Greater Adelaide as a whole.

This general consistency in average household size suggests that the subtle growth in families within the Council area has somewhat offset the growth in lone person households with respect to average household size.

Implications for Residential Land Supply

- The increase of couples without children and lone person households within the area has not increased the average household size, and therefore, has not had a direct impact on the demand for housing, yet.
- Victor Harbor needs more dwellings / households per head of population than Greater Adelaide, therefore the pressure on housing is greater.

4.3.4 Unoccupied Dwellings

The City of Victor Harbor has a large 'absent' and 'part-time' population, with 23.9% of its dwellings being unoccupied[17], compared to Greater Adelaide where just 7% of houses were unoccupied. In relation to the Victor Harbor township itself, 24.6% of dwellings were unoccupied during the 2021 census.

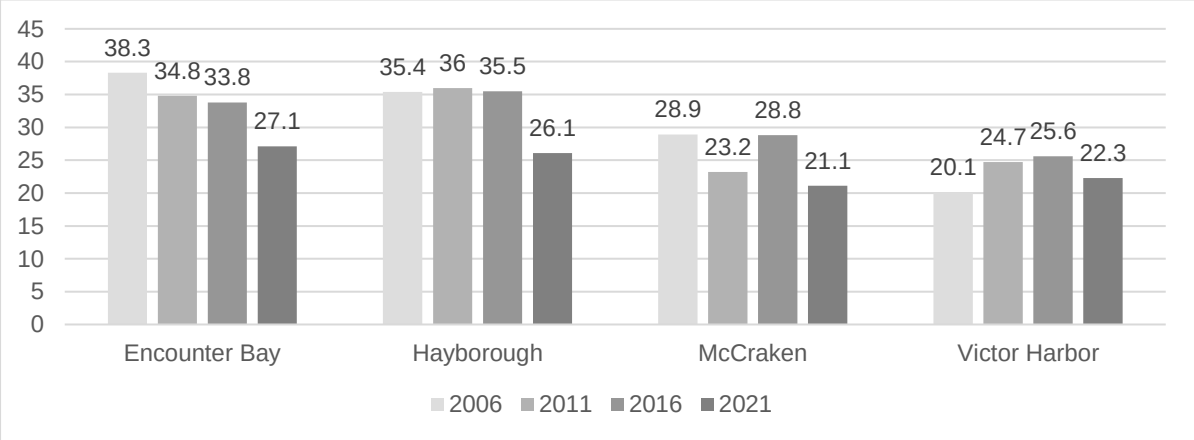
There was little change in the number of unoccupied dwellings between 2011 and 2016 (increased by 0.3%), however there was a notable reduction between 2016 and 2021 of 6.2% which could indicate the population is shifting towards a more permanent resident base. Potential drivers for this could be numerous, including a transitional population base due to the impact of ageing.

An analysis of the proportion of unoccupied dwellings per suburb is provided in Figure 4.6 below and shows this trend is consistent for all four suburbs. Some caution should be taken in respect to projecting any long-term trend due to the presence of COVID at the time of the Census. However, in comparison to other coastal townships, the Victor Harbor to Goolwa area clearly has experienced a noticeable reduction in unoccupied dwellings[18].

[17] Based on the 2021 census results for the Victor Harbor SA2 (see Figure 4.1 in section 4.1 of this report)
[18] Normanville experienced a drop in unoccupied dwellings of 1.3%, Wallaroo 0.1%, Ardrossan 0.8%, and Goolwa-Port Elliot 4.9%.

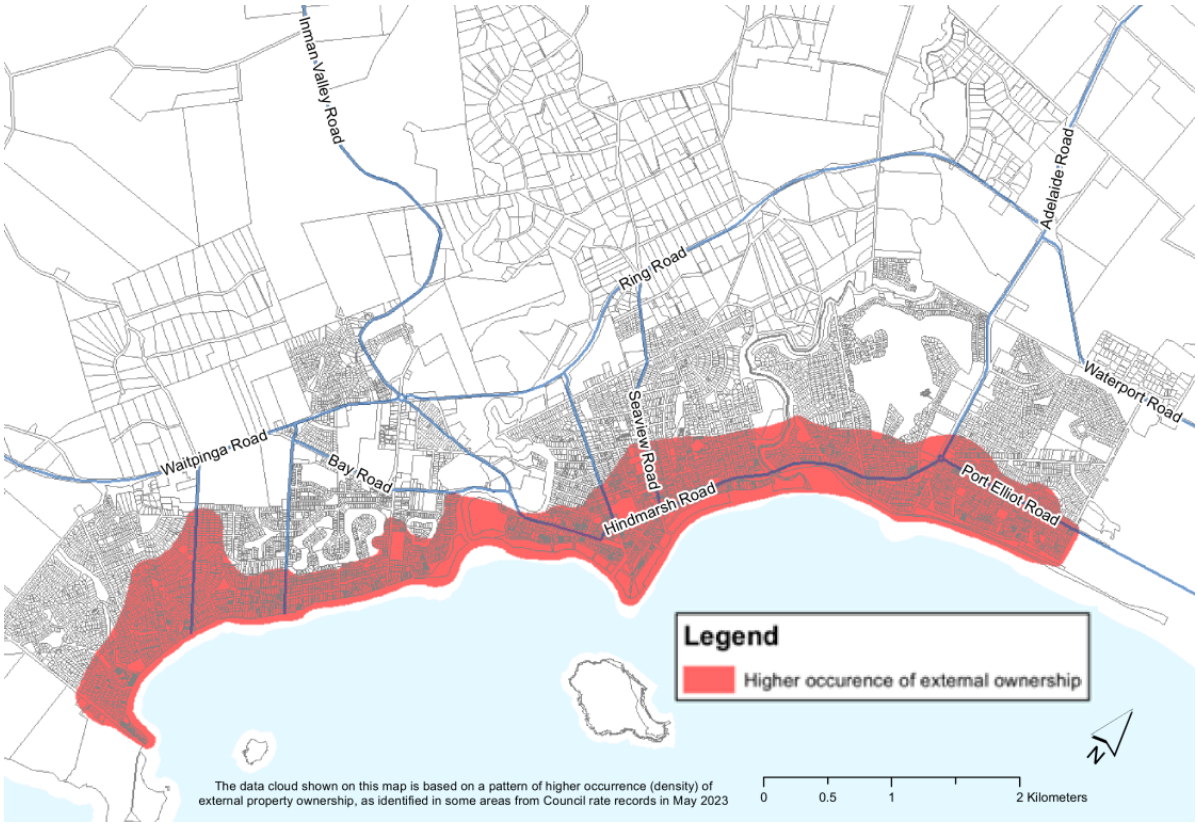
Council reviewed how many ratepayers resided outside the Council area and how many of these ratepayers held onto vacant residential land as part of their previous Urban Growth Management Strategy investigations. This review identified that up to 25% of land owners are holding on to vacant land, possibly with the intent to build once retired, and there are many others who either rent their properties to others or use them as 'holiday homes' for weekend getaways or summer holiday 'shacks'[19]. Over the summer holiday season most of the dwellings are occupied.

Figure 4.6 *Unoccupied Private Dwellings by Suburb*[20]



Council have reviewed the occurrence of external ownership and have identified that this is typically concentrated in the areas adjacent the coast, as shown in Figure 4.7.

Figure 4.7 *Areas of 'Higher Occurrence of External Ownership'*



[19] There are approximately 210 listings on AirBnB and approximately 379 listings on Stayz (April 2023) for short term leases.
[20] Based on State Suburb Census data, rather than Statistical Area 2 Data

Implications for Residential Land Supply

- Nearly 25% of dwellings were unoccupied in 2021 indicating that there is theoretical capacity within the existing dwelling stock
- Demand forecasts to need consider real demand for primary residences as well as this secondary demand for unoccupied dwellings to account for people purchasing investment properties in the area

4.4 Development Activity

4.4.1 Development Approvals

Council dwelling approvals between 2011-12 and 2021-22 averaged 142 per annum. Over the past 15 years, this has varied from 274 in 2007-08 to 104 in 2019-20, (see Figure 4.8 for more detail). Dwelling approvals also consistently exceed the number of completed allotments indicating that demand is readily consuming supply.

In relation to the Victor Harbor township specifically, between 2011 and 2021 an average of 74 dwellings per annum were built on allotments created as part of a 'greenfield'[21] development and an average of 63 dwellings per annum were built through infill on existing residential sites[22]. Since 2014, greenfield supply has accommodated the majority of new dwellings (54%) as shown in Figure 4.9, at a ratio of 54:46 (greenfield : infill).

The peaks in development activity are typically 5 years after land has been rezoned for residential purposes, noting that:

- over 90 hectares of rural land was rezoned to residential in 2008[23], followed by a peak in approved and completed allotments in the 2013-14 financial year (as shown in Figure 4.8); and
- a further 63 hectares of deferred urban land was rezoned to residential in 2016[20] with a peak in completed allotments and dwelling approvals in the 2020-21 financial year (as shown in Figures 4.8 and 4.9).

In relation to land division, the number of allotments approved within the City of Victor Harbor between 2010 and 2020 averaged 109 per annum.

It is worth noting that in response to the COVID-19 pandemic, the Australian government introduced its HomeBuilder stimulus package on 4 June 2020.

Data shows that the grant provided a significant short-term boost for housing demand in South Australia with the number of grant applications far exceeding expectations. While the HomeBuilder stimulus has boosted short term housing demand, the longer-term impacts on housing demand are not yet clear.

Implications for Residential Land Supply

- Established residential areas are still accommodating new dwellings and a more detailed analysis should be undertaken to understand if there is capacity for additional infill within existing residential areas.
- Supply should include greenfield, which currently accommodates approximately 54% of new dwellings built within the Victor Harbor township.
- Peaks in development activity typically occur 5 years after rezoning land for residential purposes.

[21] Greenfield land supply across Greater Adelaide includes:
a) broadhectare land in existing residential zones; and
b) broadhectare land identified for future urban growth in The 30-Year Plan for Greater Adelaide
- 2017 Update.

[22] Including new dwellings built after demolition of an existing dwelling and construction on an existing vacant site

[23] As referred to in the Residential Broadhectare Land Supply Report released in 2019 by the State Government, available here: https://dit.sa.gov.au/__data/assets/pdf_file/0004/671647/Broadhectare_Report_2019.pdf

Figure 4.8 *Dwelling and Allotment Approvals for the City of Victor Harbor by financial year from 2007-08 to 2020-21 (source: State Government's Residential Land Development Monitor) https://plan.sa.gov.au/state_snapshot/land_supply/Residential_land_development_monitor*

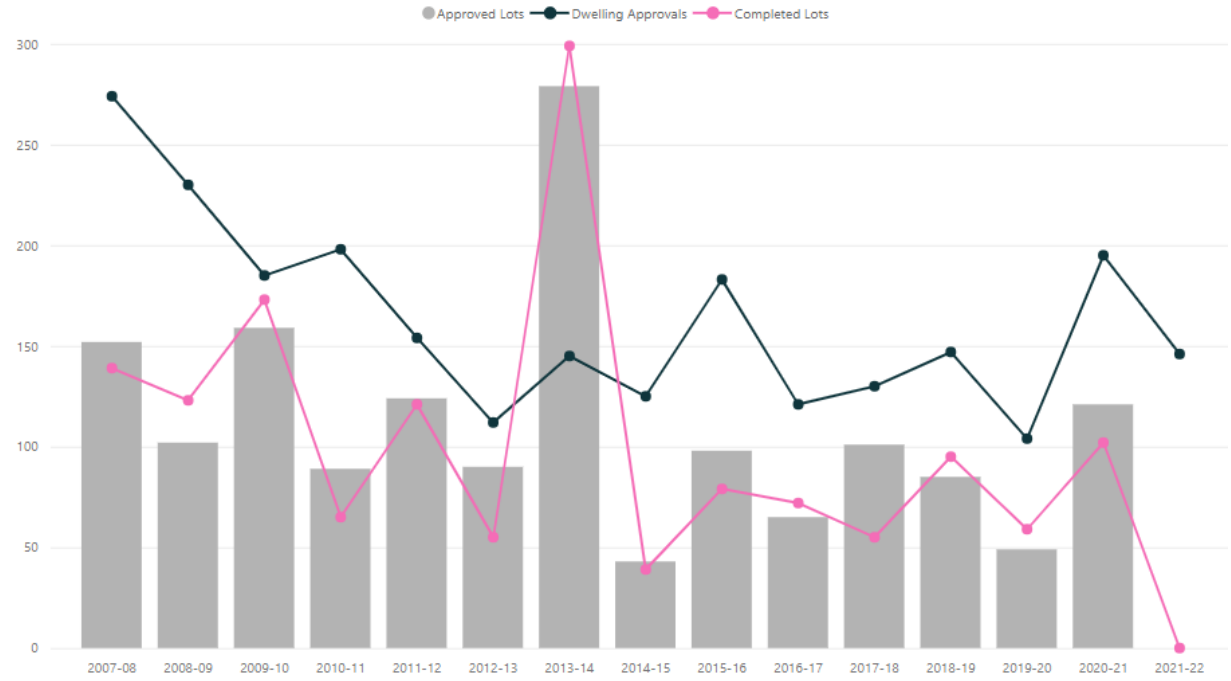
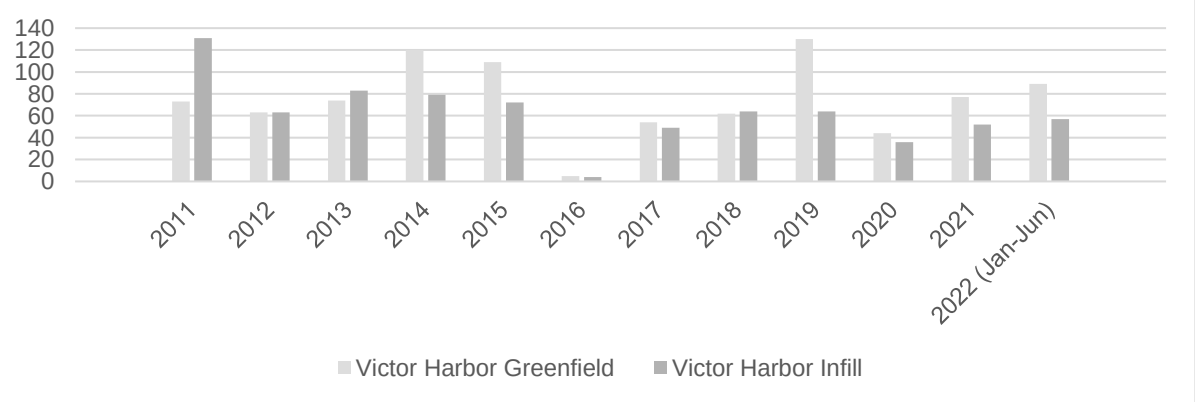


Figure 4.9 *Number of Dwellings Built in Victor Harbor resulting from greenfield and infill.*



4.4.2 Allotment Density

The gross dwelling density for Victor Harbor is 9.5 dwellings per hectare. New developments within Victor Harbor have typically provided a slightly higher dwelling density noting that on average, greenfield development in the township has the second highest dwelling yield for the non-metropolitan area of 10.6 lots per hectare[24].

A review of significant and active greenfield development applications has been undertaken to understand the density at which residential development is being delivered. The findings of this review are provided in Table 4.2 and each of the developments are shown in Figure 4.10.

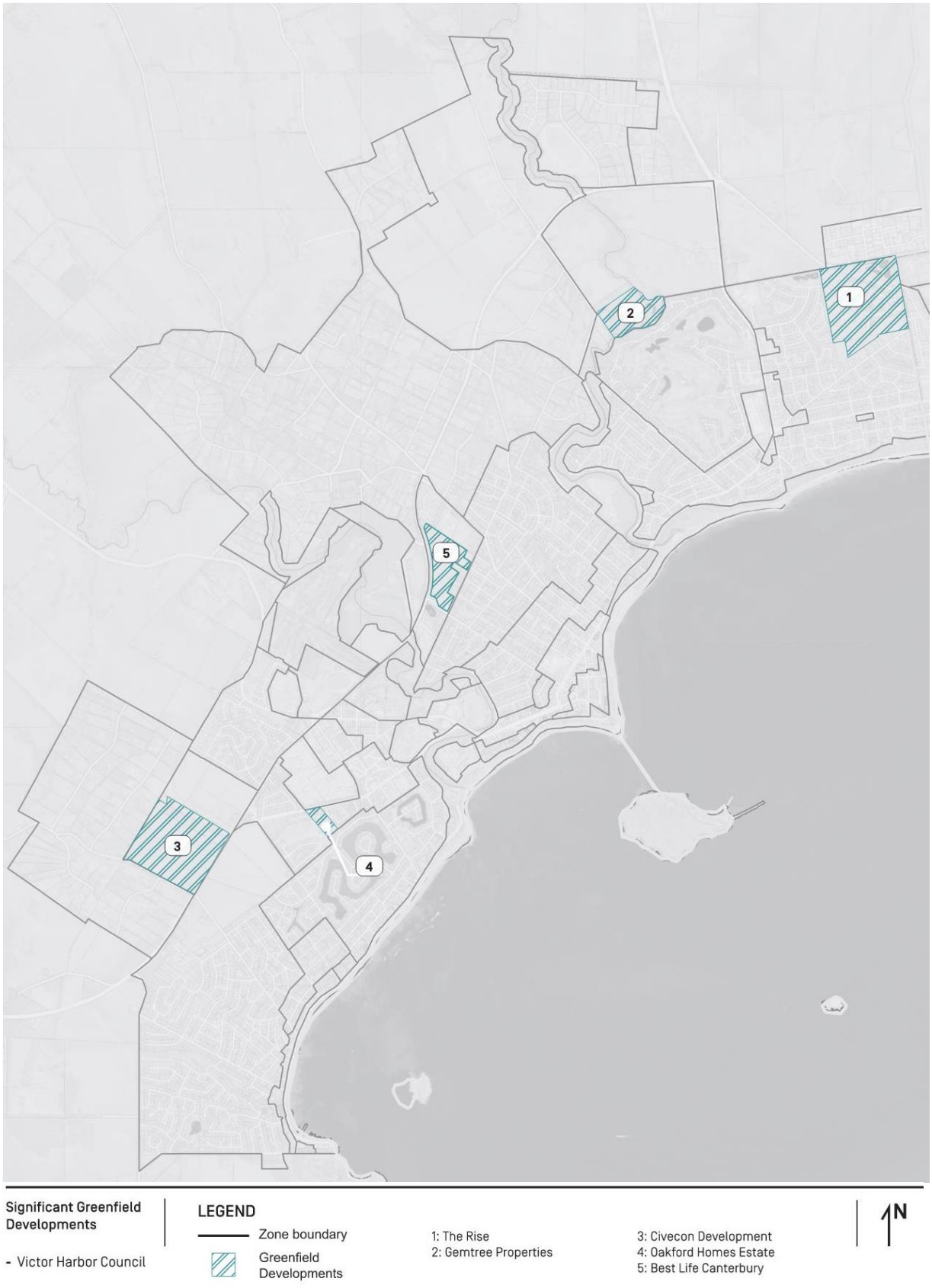
[24] Residential broad hectare land supply report - 30 June 2019, available here: https://dit.sa.gov.au/__data/assets/pdf_file/0004/671647/Broadhectare_Report_2019.pdf

Table 4.2 *Summary of Significant Greenfield Development Applications*

Development	Location	Number of Allotments	Developable Area (ha)	Gross Density (dwellings per hectare)	Zone
The Rise (2007)	Ocean Road, Hayborough	359	34.06	10.5	Suburban Neighbourhood Zone
Gemtree Properties (2014)	Waggon Road, Hindmarsh Valley	76	10.2	7.5	Master Planned Neighbourhood Zone
Civecon Development *(2022, under assessment)*	Waitpinga Road, Waitpinga	251	34.8	7.2	Master Planned Neighbourhood Zone
Oakford Homes Estate (2018)	Bay Road, Encounter Bay	49	2.3	21	General Neighbourhood Zone
Best Life Canterbury (2022)	Canterbury Road, Victor Harbor	315[25]	11.5	27.4	Suburban Neighbourhood Zone

[25] Dwellings have been approved, however, as the proposed development is part of a residential park, no allotments are proposed

Figure 4.10 *Significant Greenfield Developments in the Victor Harbor township*



This review has identified that residential development is being delivered (or proposed, in the case of the Civecon Development) at an average of 14.7 dwellings per hectare whilst the median density is 10.5 dwellings per hectares.

Several factors influence the density of residential development and closer analysis has confirmed that some of the densities are higher or lower due to site specific constraints or opportunities, which include:

- A large area has been reserved at the front of the Civecon development which has resulted in a reduced gross density of 7.2 dwellings per hectare. The intended use of the area is not known, however, it could be:
  - » a super-lot created for future residential development;
  - » land provided for public infrastructure or open space; or
  - » due to the position of the land within the Emerging Activity Centre Subzone, could be land reserved for future commercial uses.
- The Gemtree Properties development abuts the Hindmarsh River and a large area has been provided for public open space, resulting in a reduced density of 7.5 dwellings per hectare. The Hindmarsh River traverses or abuts land in the Master Planned Neighbourhood Zone and Deferred Urban Zone and accordingly, large areas of open space are anticipated to influence densities in these locations;
- No public open space or land for stormwater management has been incorporated into the Oakford Homes development, facilitating a significantly higher gross density of 21 dwellings per hectare; and
- The Best Life Canterbury Estate is a residential park with 315 group dwellings, which has resulted in the average site area per dwelling of 365 square metres per dwelling, rather than 420 square metres per group dwelling[26] anticipated by the Technical and Numeric Variation (TNV) in the Planning and Design Code.

Having regard to the above, it is considered likely that most future development sites will achieve a density of between 7.5 and 10.5 dwellings per hectare, noting that some sites will experience opportunities or constraints that will influence these densities.

Implications for Residential Land Supply

- Residential development typically occurs at low densities and evaluations of residential land supply should consider that the planned residential areas could deliver residential yields of between 7.5 and 10.5 dwellings per hectare

4.5 Global and Local Market Influences

4.5.1 Local Housing Market

The real estate market has experienced rapid growth post-COVID. While this is slowing, real estate in Victor Harbor in both house sales and rentals continues to show steady growth. The LGA median house price of $608,064[27] is well above the current price point for affordable housing of $417,000[28].

[26] Anticipated by the Technical and Numeric Variation in the Planning and Design Code.
[27] Inquiry into South Australian Housing Affordability, Economic and Finance Committee, LGA Submission, February 2023 (median house price as of January 2023)
[28] SA Housing Authority 2023

There is strong demand for both houses to purchase and to rent. Rental vacancy rates are down to 2.3%[29] across Victor Harbor and Alexandrina Councils, noting that South Australia has a lower vacancy rate of 0.6% in December 2022[30]. House prices have risen by over 60% in the last 5 years, while metropolitan Adelaide has risen by 45% over the same period.

Table 4.3 *Real estate market performance*[31]

	Median House Price June 2022 - May 2023	Sales in past 12 months	12-month Median Sales Increase	Interested buyers in past month (March 2023)	Leases in past 12 months	Median rental price (May 2023)	Interested renters in past month (March 2023)
Victor Harbor	$571,000	110	20.8%	1439	51	$450	192
Encounter Bay	$585,000	184	11.6%	2032	128	$480	247
Hayborough	$560,000	53	8.0%	617	23	$520	54
McCracken	$602,500	42	15.3%	1003	25	$510	35

Strong demand appears to be pushing property prices up well above the median house price due to a lack of supply. There is a clear need for more housing to address the affordability issue. While house prices have started to steady in Metropolitan Adelaide, suburb prices in the council area are continuing to rise (Figure 4.11).

The rental market is still experiencing strong growth, with a 39% increase over the last 5 years, compared to 37% in metropolitan Adelaide. The growth has been steady over this period, however, the 12 months between December 2021 and December 2022 experienced a 23% increase in both Victor Harbor and Adelaide. These trends are shown in Figure 4.12.

At any given time, there are very few rental properties available for rent (i.e. only 18 listed from all four suburbs on 26 April 2023) and the number of people actively looking for a rental is over 350. Victor Harbor is the most popular suburb with the most people actively looking and the shortest number of days a property remains listed (16 days). Encounter Bay is the second most popular suburb with over 200 people actively looking for a rental and properties being rented within 19 days. The least popular suburbs are Hayborough and McCracken where rents are slightly higher, however, rental properties are still remaining listed for less than a month and there are more people actively looking than available rental properties[32].

[29] Inquiry into South Australian Housing Affordability, Economic and Finance Committee, LGA Submission, February 2023 (data as of January 2023)
[30] Economic and Finance Committee, South Australian Housing Availability Issues Paper
[31] Realestate.com.au March 2023
[32] Realestate.com.au (April 2023)

Figure 4.11 *Median house prices by suburb in Victor Harbor compared to Metropolitan Adelaide*[3334]

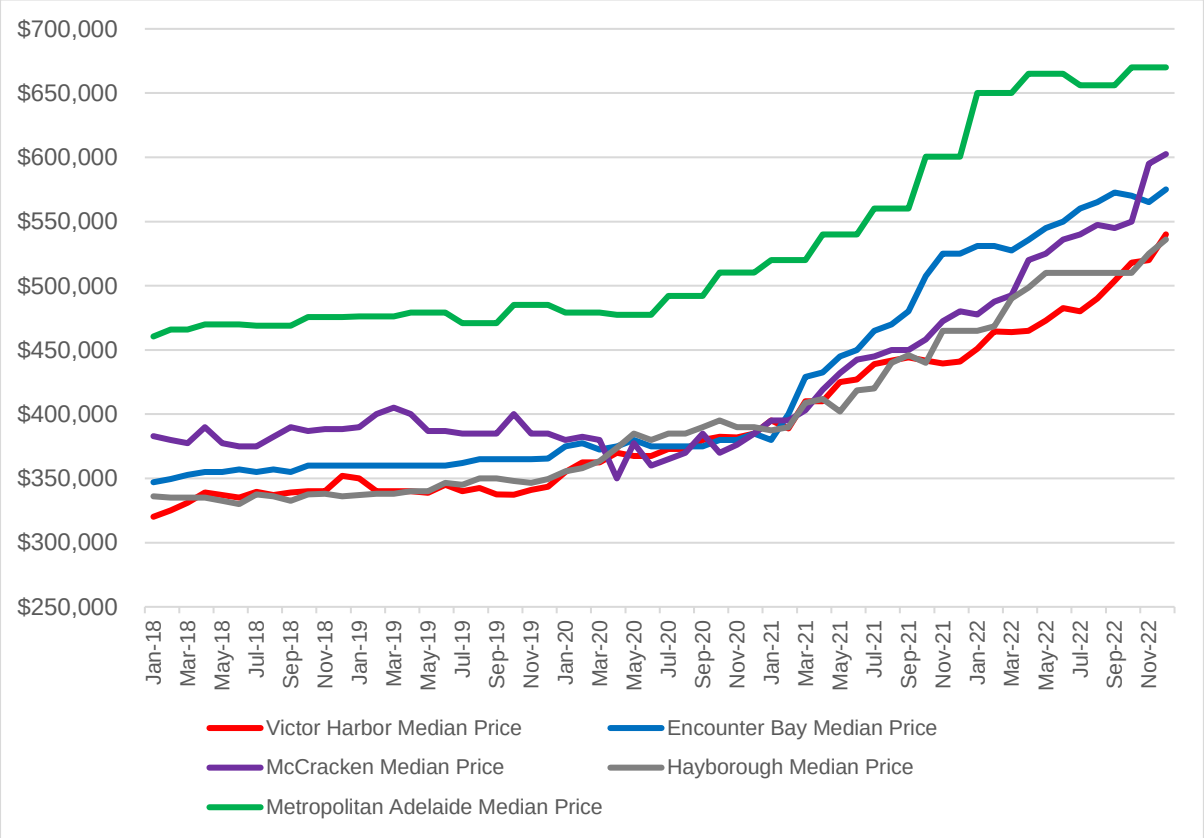
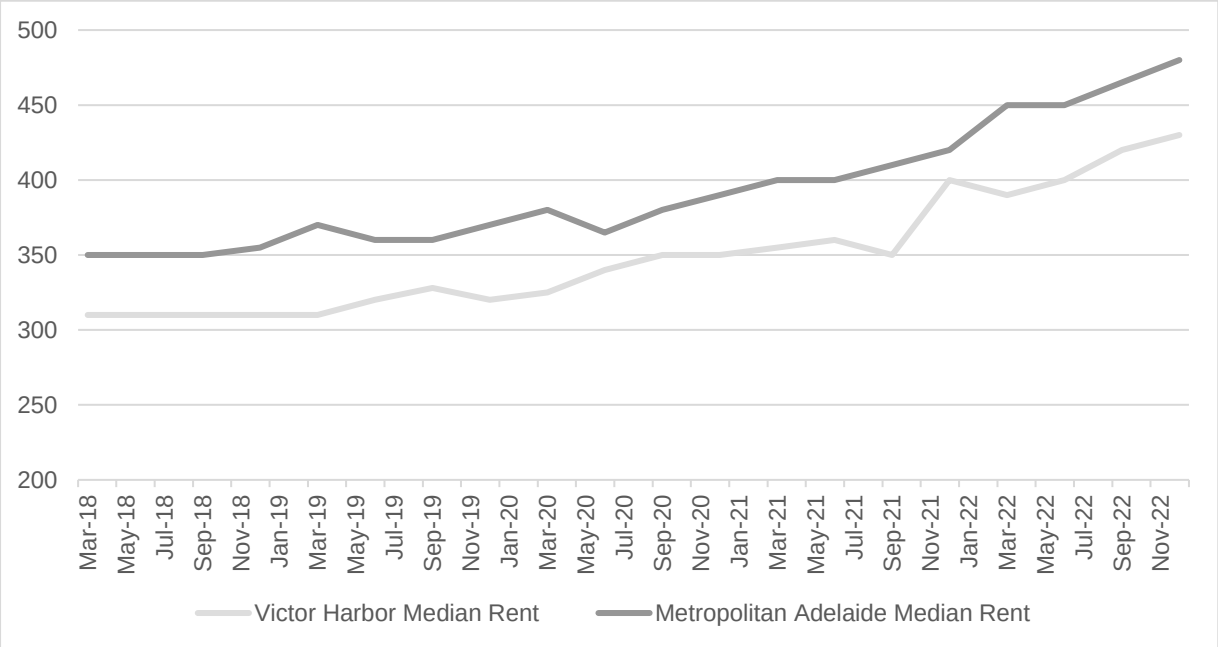


Figure 4.12 *Median house rent prices in Victor Harbor LGA compared to Metropolitan Adelaide*[35]



[33] Note Metropolitan Adelaide data is captured quarterly. Suburb medians within Victor Harbor LGA are shown monthly.
[34] RP Data and Valuer General Data – as recorded March 2023
[35] Rental Bond Data Set of the Tenancies Branch, Office of Consumer and Business Services, provided by Data Analytics, SA Housing Authority March 2018 – December 2022

There are approximately 210 listings on AirBnB and approximately 379 listings on Stayz (April 2023) for short term leases, accounting for up to 5.1% of unoccupied dwellings on Census night (noting that 23.9% of dwellings were unoccupied). This is further exacerbating the shortage of rental properties as many owners clearly have a preference for higher income, short term stays over longer-term tenancies.

In relation to the type of demand, an analysis of house and land sales between 5 June 2022 and 5 June 2023 has confirmed that:

- The average allotment size (including vacant land and land occupied by a dwelling) sold during this period was 932 square metres and the median allotment size was 619 square metres;
- 19% of sales were for group dwellings or dwellings in residential flat buildings (i.e. dwellings in a Community or Strata Title arrangement); and
- 16% of sales were for residential land.

Implications for Residential Land Supply

- There is a need for more housing to address the housing affordability issue
- There is demand for small housing typologies

4.5.2 Influencing Factors

The most prevalent issues facing growth in South Australia and Greater Adelaide currently are:

- A lack of available housing (to rent or buy) and available land supply (that is development ready[36]);
- Data may indicate a relative supply of housing and land but this is actually unavailable (i.e. is not on the market, available to rent or buy, is a holiday home, AirBnB, being held for future retirement etc);
- Housing demand is dependent on population growth which is being significantly impacted by stalled overseas migration[37] which has commenced its recovery, primarily through the return of tertiary students and is likely to drive demand in Greater Adelaide, as compared to Victor Harbor;
- A shortage of building materials which is leading to extended building timeframes;
- High interest rates;
- Rising inflation and cost of living; and
- High fuel prices.

Key influencing factors specific to Victor Harbor are:

- Environment and Food Production Areas (EFPA) restricting land for future growth;
- A lack of housing and land supply more generally in the Fleurieu region;
- Upgrades to key infrastructure (i.e., duplication of Main South Road and Victor Harbor Road);
- The need to attract more families and younger households into Victor Harbor; and
- Large scale projects which could act as large attractors (i.e., a significant tourism development).

[36] Development Ready refers to land that has a proposed or approved land subdivision plan lodged
[37] Government of South Australia, June 2021, Land Supply Report for Greater Adelaide, Background & Context

National and Global factors that may influence population, housing and the economic environment in Victor Harbor include:

- changes to global economic markets;
- political change;
- changes to Federal or State Government policies, particularly in areas such as overseas migration, education, information and communication technology, trade and exports and health;
- technological change;
- rising petrol prices;
- rising energy prices;
- impact/costs of climate change;
- supply chain issues; and
- stimulus packages.

These external forces are not unique to Victor Harbor. They cannot be accurately predicted over long periods nor can they be readily influenced by local government. As such any change to national or global trends beyond 2023 have not been factored into future population growth scenarios for Victor Harbor.

Implications for Residential Land Supply

- The market influences housing supply and demand, what people can afford and where they can afford it
- Impacts of external forces are unable to be considered in the medium to long term

4.6 Future Population and Housing Model

A future population and housing model has been developed for the City of Victor Harbor having regard to population growth since 2011, demographic trends, development activity and global and local market influences. The model forecasts that the City of Victor Harbor will grow by approximately 264 to 296 people per annum, as shown in Table 4.4. More specifically, these growth scenarios will result in 3,955 to 4,435 additional people over the next 15 years and 7,911 to 8,868 people over the next 30 years.

This growth effectively represents a mid-point between the average growth that the City of Victor Harbor has experienced since 2011 and the high growth experienced during housing stimulus. This is discussed in more detail in the Council Area Profile prepared for Council by Future Urban, and provided under separate cover.

Table 4.4 *Forecast Growth Scenarios for the City of Victor Harbor*

Considerations	Business as Usual	Forecast Growth		High Growth (Housing Stimulus)
		Growth Scenario 1	Growth Scenario 2	
Dwellings approved per year	142	165	185	211
Persons per dwelling	2.1	2.1	2.1	2.1
Occupancy rate	76.1%	76.1%	76.1%	76.1%
Persons per year based on new dwellings approved	226.9	**263.7**	**295.6**	337.2
10 Year Growth Scenario – Additional Persons	2,269	**2,637** (18,776 total population)	**2,956** (19,095 total population)	3,372
15 Year Growth Scenario – Additional Persons	3,404	**3,955** (20,094 total population)	**4,435** (20,574 total population)	5,058
30 Year Growth Scenario – Additional Persons	6,807	**7,911** (24,050 total population)	**8,868** (25,007 total population)	10,116

The above growth scenarios are based on data for the whole City of Victor Harbor Council area. In respect to the growth that will be accommodated within the Victor Harbor township, it is noted that:

- 98.1% of the City of Victor Harbor resided in the township at the 2021 Census; and
- The government projections identify that up to 98.6% of the population will reside in the Victor Harbor township in 2036.

Accordingly, for the purposes of this analysis, it is important to focus on the proportion of the growth which will occur within the Victor Harbor township itself. Assuming that up to 98.6% of the above population growth will be accommodated within the Victor Harbor township, the township's population will grow by 2,600 to 2,900 people over the next 10 years, or 3,900 to 4,350 people over the next 15 years. This will require between 163 and 181 dwellings per annum as shown in Table 4.5.

Table 4.5 *Forecast Growth Scenarios for the Victor Harbor township*

Considerations	Growth Scenario 1	Growth Scenario 2
Dwellings approved per year	163	181
Persons per dwelling	2.1	2.1
Occupancy rate	76.1%	76.1%
Persons per year based on new dwellings approved	260	290
10 Year Growth Scenario – Additional Persons	2600	2900
15 Year Growth Scenario – Additional Persons	3900	4350
30 Year Growth Scenario – Additional Persons	7,800	8,700

4.7 Summary

Population growth, demographic trends, development activity and global and local market influences are the four factors which have been analysed to understand demand for residential land within Victor Harbor township. This review has established that there is likely to be demand for between 163 and 181 dwellings per year.

The review has also identified implications for residential land supply to inform the analysis of existing and planned residential supply. These implications are summarised in Table 4.6.

Table 4.6 *Implications for Residential Land Supply*

Factor		**Implication for Residential Land Supply**
Population Growth	Recorded Growth and Government-Projected Growth	• In 2019, the State Government projected that the City of Victor Harbor will continue to grow at a rate of 1.1% per annum and in 2023, the State Government forecast that the Fleurieu region will grow at a rate of 1.9% (medium growth) to 2.3% (high growth) between 2021 and 2041. • Residential land supply should account for this growth and factor in the recent regional growth projections prepared by the State Government. • There will be a subtle increase in people residing in the Victor Harbor urban area.
Demographic Trends	Age	• The population is ageing and such is likely to increase demand for smaller housing and/or supported accommodation. In addition, it is likely to increase the number of lone person households and reduce household sizes, creating demand for additional housing. • Housing strategy should plan for diversity of household types.
	Household Composition	• The increase in couples without children and lone person households decreases household sizes and in turn, results in demand for additional housing (i.e., increases the number of houses required to accommodate the same number of people as household sizes are smaller). • Housing strategy should plan for diversity of household types.
	Household Size	• The increase of couples without children and lone person households within the area has not increased the average household size, and therefore, has not had a direct impact on the demand for housing, yet. • Victor Harbor needs more dwellings / households per head of population than Greater Adelaide, therefore the pressure on housing is greater.
	Unoccupied Dwellings	• Nearly 25% of dwellings were unoccupied in 2021 indicating that there is capacity within the existing supply. • Demand forecasts to need consider real demand for primary residences as well as this secondary demand for unoccupied dwellings to account for people purchasing investment properties in the area

Factor		Implication for Residential Land Supply
Development Activity	Development approvals	• Established residential areas are still accommodating new dwellings and a zoning analysis should be undertaken to understand if there is capacity for additional infill within existing residential areas. • Supply should include greenfield, which currently accommodates approximately 54% of new dwellings built within the Victor Harbor township. • Peaks in development activity typically occur 5 years after rezoning land for residential purposes.
	Allotment Density	• Residential development typically occurs at low densities and evaluations of residential land supply should consider that the planned residential areas could deliver residential yields of between 7.5 and 10.5 dwellings per hectare.
Market	Local Housing Market	• There is a need for more housing to address the housing affordability issue. • There is demand for small housing typologies.
	Global and Local Factors Influencing the Market	• Market influences housing supply and demand, what people can afford and where they can afford it. • Impacts of external forces are unable to be considered in the medium to long term.

5. RESIDENTIAL LAND SUPPLY

This section of the report details the findings of an audit of the City of Victor Harbor's existing and planned residential supply. The methodology for this audit is outlined in section 5.2.

In addition, it also reviews:

- the current Urban Growth Management Strategy (UGMS) to understand what residential supply has been delivered in line with the current UGMS and which expansion areas are yet to be delivered; and
- the planned residential growth areas that exist within Middleton, Port Elliot, Goolwa and Hindmarsh Island.

5.1 Urban Growth Management Strategy

Council's current UGMS anticipates residential expansion to 2030 to be accommodated within the following areas:

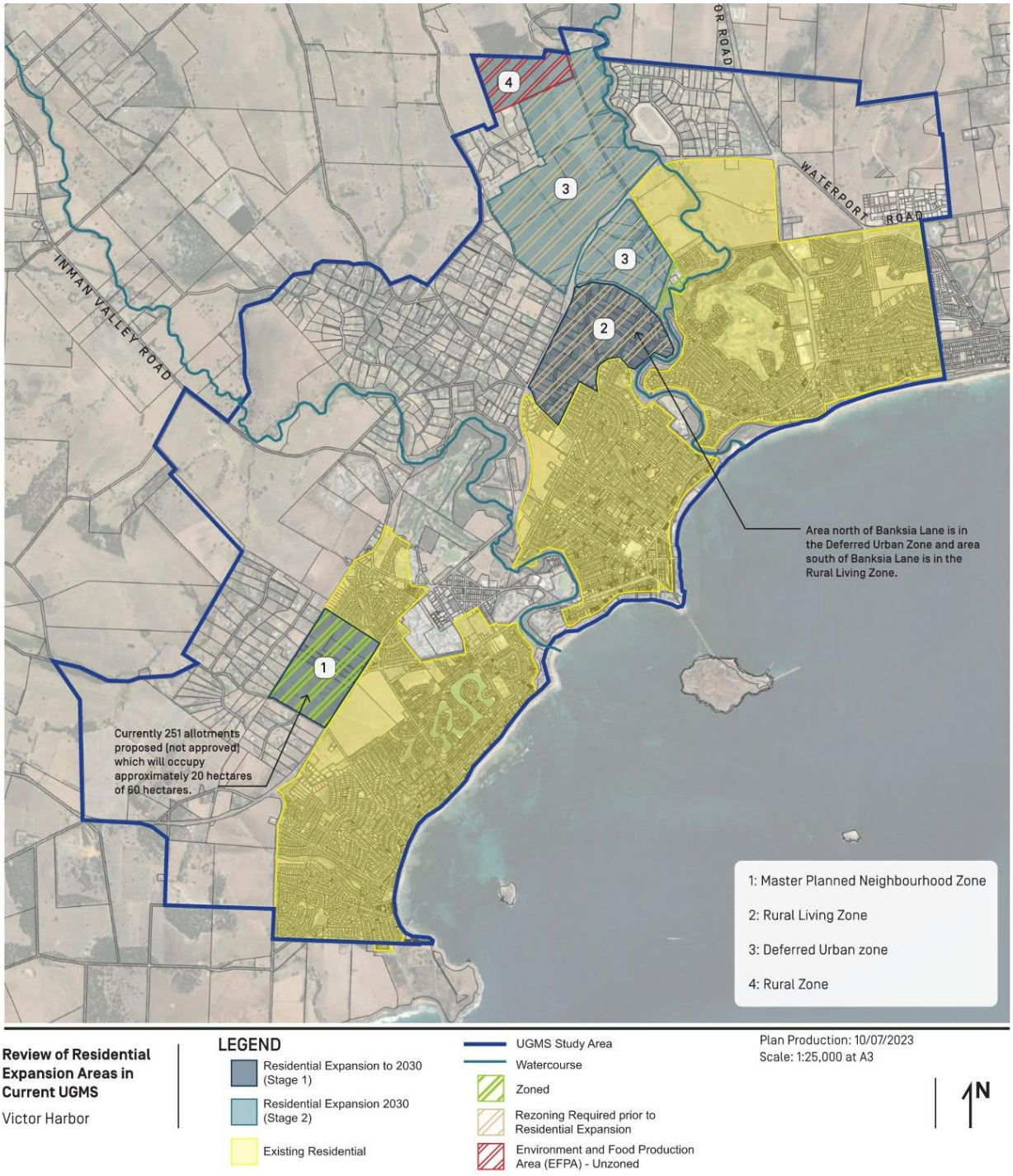
1) Within the Master Planned Neighbourhood Zone in Waitpinga (shown as 1 in Figure 5.1);
2) Within the part of the Rural Living Zone in Victor Harbor that is east of Armstrong Road, north of Greenhills Road and south of Bankisa Lane (rezoning required prior to residential expansion) (shown as 2 in Figure 5.1);
3) Within the Deferred Urban Zone in Victor Harbor, east of Armstrong Road, north of Bankisa Lane and south of Waggon Road (rezoning required prior to residential expansion) (shown as 3 in Figure 5.1); and
4) Within the Rural Zone on an allotment identified as Lot 16 Waggon Road, Hindmarsh Valley (rezoning and change to the Environment and Food Production Area prior to residential expansion) (shown as 4 in Figure 5.1).

The Council have received four land division applications which seek to create a combined total of 251 allotments over nine stages within the Master Planned Neighbourhood Zone in Waitpinga (shown as 1 in Figure 5.1). In the event that these four land division applications are approved, approximately 40 hectares of undeveloped land will remain in this Zone. The potential dwelling yield of these areas is reviewed in the following sections.

The remaining areas for residential expansion require rezoning prior to additional residential development occurring in these areas.

The UGMS also envisaged residential infill/consolidation within 500 metres of three centres. These centres have the relevant policy settings to facilitate residential development. However, one centre (the main Victor Harbor centre) only facilitates residential development where it is ancillary to non-residential development. Noting that the building height is typically 2 building levels in the main centre, such limits opportunity for any significant residential development above commercial uses. Whilst it is acknowledged that increased residential development is sought in these areas, it is important to note that business uses should still take precedent and managing conflicts with these uses can be challenging, particularly with noise generating uses such as live music venues which are ideally located in the Centre. This is supported by UGMS action 1.1.10.

Figure 5.1 *Review of expansion areas in the UGMS and their current zoning status (i.e. zoned or unzoned).*



5.2 Methodology

In order to undertake a review of existing and planned residential supply, it is necessary to evaluate how many dwellings can be accommodated within the existing and planned residential areas, referred to as the potential yield. The potential yield for a site or area was determined by applying a gross density of 7.5 to 10.5 dwellings per hectare to provide a potential minimum yield and a potential maximum yield. These densities were based on the analysis of active greenfield developments in section 4.4.2 of this report.

These densities were considered appropriate for use in most Zones, noting that:

- These densities were based on development that has occurred in both the Suburban Neighbourhood Zone and the Master Planned Neighbourhood Zone; and
- The densities were still within a suitable range for areas of the Hills Neighbourhood Zone which have a minimum allotment size of 560 square metres.

An alternative methodology was required for some sites within the Hills Neighbourhood Zone where higher minimum allotment sizes (between 1,500 and 2,200 square metres) would likely result in lower dwelling densities[38]. For these sites, the minimum allotment size was used to calculate the potential yield and the following reductions to the developable area applied depending on the potential yield:

- A 20% reduction was applied to the developable area where less than 20 allotments were anticipated to allow for roads and stormwater infrastructure; and
- A 32.5% reduction was applied to a developable area where more than 20 allotments were anticipated to allow for roads, stormwater infrastructure and public open space.

The yield was not calculated for:

- Sites which were the subject of a current development application or development approval for land division, in which case the proposed or approved number of allotments was adopted as the potential yield;
- Sites with an area less than 1 hectare;
- Sites which are unlikely to accommodate new residential development, including:
  - » Sites which were already occupied by a residential park, village or recreational use;
  - » Sites which were owned by Council, the Crown or the Government; or
  - » Sites which were occupied by a heritage place.

The sites which are unlikely to accommodate new residential development are identified on the maps contained in **Appendix 1** to provide clarity on which land has been included in the potential yields.

It is important to note that due to the nature of this review, not all constraints have been considered for all land (such as vegetation retention, flooding, detailed infrastructure implications, capital value to site value ratio etc). This would require a detailed feasibility review for each allotment with development potential. Notwithstanding, the above methodology is based on densities achieved in existing developments within Victor Harbor which had their own set of constraints influencing these yields (such as the Hindmarsh River). Accordingly, sufficient scrutiny is built into the above methodology to enable its use to evaluate the potential capacity of residential land within the Victor Harbor township for the purposes of determining if there is sufficient land available for residential purposes in Victor Harbor.

[38] This alternative methodology was applied for Lot 503 Jasmin Drive, Victor Harbor on Map 6 in Appendix 1 and for two sites on Map 7 in Appendix 1.

5.3 Existing Residential Land Supply

Victor Harbor's existing supply is provided across the following Zones:

- General Neighbourhood Zone;
- Master Planned Neighbourhood Zone;
- Hills Neighbourhood Zone;
- Housing Diversity Neighbourhood Zone;
- Waterfront Neighbourhood Zone;
- Business Neighbourhood Zone;
- Suburban Neighbourhood Zone;
- Home Industry Zone;
- Suburban Main Street Zone; and
- The Rural Living Zone.

These Zones are shown in Figure 5.2 below.

An audit of land within each of these Zones has occurred to identify:

- Vacant allotments, which have been identified from aerial imagery dated March 2023;
- Allotments which have been approved as part of a development application for 10 or more allotments and are awaiting infrastructure to be constructed before being deposited and released to the market;
- Allotments which have been proposed as part of a development application for 10 or more allotments;
- The potential yield of future development on allotments greater than 1 hectare, through the methodology described in section 5.2 above; and
- Sites which are unlikely to accommodate additional residential development referred to above.

The findings of this audit are presented in:

- A series of detailed maps in **Appendix 1**; and
- A spreadsheet in **Appendix 2**.

Figure 5.2 *Existing Neighbourhood and Residential Type Zones*



In summary, this audit has identified that:

- The existing capacity of the neighbourhood/residential type zones includes:
  - » 521 vacant allotments; and
  - » 507 approved[39] allotments which will be able to accommodate a dwelling once infrastructure is constructed and the allotments are deposited.
- The future capacity of the existing neighbourhood/residential type zones includes:
  - » 251 proposed allotments; and
  - » A further 1,385 to 1,920 allotments if/when vacant or underutilised land greater than 1 hectare is developed for residential purposes.

Having regard to infill development, 761 dwellings have been constructed as a result of minor infill between 2010 and 2021, with an average of 63 new dwellings being constructed per year. If this rate continues for the next 15 years, a total of 945 additional dwellings can be delivered through infill.

A review of the above zones was undertaken to understand if there is capacity within these zones to accommodate further infill. Infill potential was identified in most zones and was the greatest in the Waterfront Neighbourhood Zones and Housing Diversity Neighbourhood Zones which provide the smallest minimum allotment sizes relative to the existing allotment sizes.

When combining the number of vacant allotments, approved allotments, proposed allotments, development potential of underutilised land and infill potential, the existing zoned supply has the capacity to accommodate 3,609 to 4,144 new dwellings.

Based on a consumption rate of 163 to 181 allotments per year, the existing supply has the ability to cater for 20 to 25 years of residential demand.

5.4 Supply Typologies

The analysis of demographic trends and the local housing market contained in sections 4.3 and 4.5.1 of this report, respectively, identified that housing supply should plan for diversity of household types. More specifically, the existing residential areas should ensure that small housing typologies suitable for an ageing population and small households are able to be established. Accordingly, an analysis of the existing zones has been undertaken to understand if there is capacity within the existing zones to allow for housing diversity. The findings of this analysis are provided in Table 5.1.

It is evident from the below analysis the existing zones within the City of Victor Harbor encourage a variety of housing typologies.

Table 5.1 *Housing Typology Zoning Analysis*

Zone	Housing Types Anticipated	Density	Minimum Allotment Sizes
General Neighbourhood Zone	All types	Predominantly low density with medium density closer to public open space and activity centres	250 m^2 to 300 m^2
Master Planned Neighbourhood Zone	All types	Low to medium densities	N/A

[39] Including 315 dwellings approved as part of a residential park at 97 – 107 Canterbury Road, Victor Harbor

Zone	Housing Types Anticipated	Density	Minimum Allotment Sizes
Hills Neighbourhood Zone	All types anticipated but typically detached dwellings due to allotment sizes	Low density	560 m^2 to 2200 m^2
Housing Diversity Neighbourhood Zone	All types	Medium density	180 m^2 (row dwelling) to 300 m^2 (detached dwelling)
Waterfront Neighbourhood Zone	All types	Not stated but minimum allotment sizes cater for both low and medium density. It is expected that the net density of the overall Zone is likely to remain low density (net density of 35 dwellings per hectare[40])	Adjacent the coast: 180 m^2 (row dwelling) to 300 m^2 (detached dwelling) Around Encounter Lakes: 200 m^2 (row dwelling) to 390 m^2 (detached dwelling)
Business Neighbourhood Zone	All types	Not stated but currently low density	N/A Allotments should vary in size and be suitable for residential and commercial activities
Suburban Neighbourhood Zone	All types, however development is generally semi-detached or detached dwellings	Low density	300 m^2 (semi-detached dwelling) to 500 m^2 (detached dwelling)
Home Industry Zone	Type isn't limited by policy, however, nature of Zone generally encourages detached dwellings	Low density	N/A Size and shape of allotments should be suitable for a dwelling and associated home-based business
Rural Living Zone	Detached dwelling	Very low density	5000 m^2 to 2 ha
Suburban Main Street Zone	Dwellings above non-residential development	Medium density	N/A Allotments should be suitable for a variety of residential and commercial activities

[40] Prescribed by Part 8 of the Planning and Design Code

5.5 Planned Residential Land Supply

The 30 Year Plan for Greater Adelaide identifies growth areas within the 'Planned Urban Lands to 2045' boundary and is shown as land which 'requires rezoning prior to residential use' in Figure 5.3. This land currently sits within the Deferred Urban and Rural Zones and accordingly, requires rezoning prior to future development.

The 30 Year Plan does not designate which growth areas within the City of Victor Harbor are intended for residential, commercial or employment purposes. However, most of this land is expected to be used for residential purposes.

The planned supply is approximately 267 hectares in area and is likely to accommodate low density residential development, based on the density anticipated in the adjacent Master Planned Neighbourhood Zone and the general pattern of development in Victor Harbor.

It is worthwhile noting that part of the planned supply is not nominated in the current UGMS. This land excluded includes the allotments along Stirling Court and the land bound by Victor Harbor Road to the west, Strawberry Hill Road to the south and Waterport Road to the north-east. These sites are shown as site 1 and 2 in Figure 5.3.

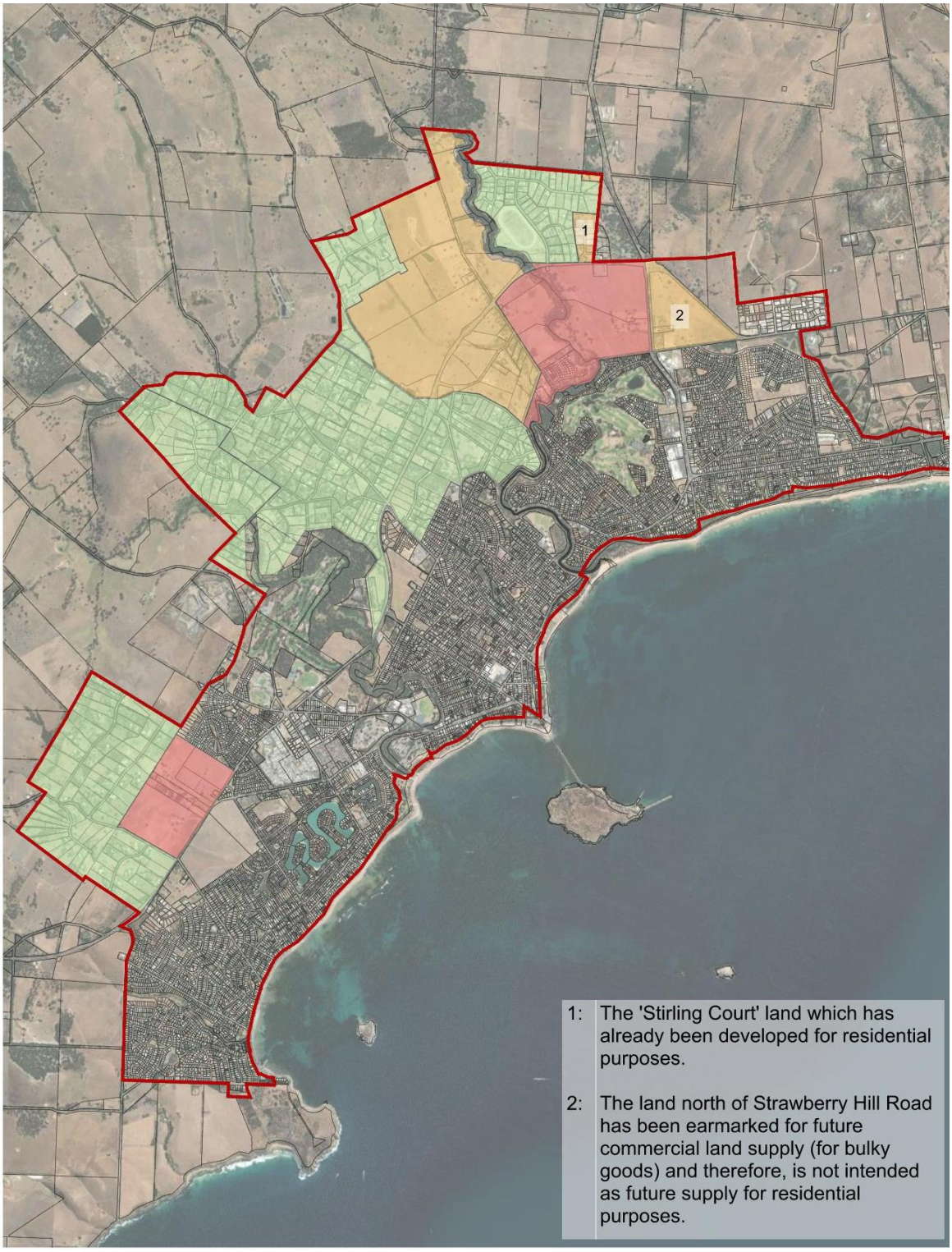
It is anticipated that these sites were excluded from the UGMS for the following reasons:

- The Stirling Court land is already developed for residential purposes and therefore, will not provide additional residential supply; and
- The land north of Strawberry Hill Road has been earmarked for a future commercial land supply (for bulky goods) and therefore, is not intended as future supply for residential purposes.

Therefore, for the purposes of this review, the above planned supply has not been included in the planned residential supply.

The balance of the land is approximately 228 hectares in size. Based on the methodology described in section 5.2 above, this area has the collective capacity to provide a further 1,710 to 2,394 allotments.

Figure 5.3 *Planned Residential Land Supply Areas*



Future Urban Growth Areas
Victor Harbor

LEGEND

Planned Urban Lands to 2045 (Urban Boundary)

Zoned

Rural Living

Requires rezoning prior to residential use

N

5.6 Planned Residential Land Supply in Adjacent Areas

Port Elliot, Middleton, Goolwa and Hindmarsh Island contain areas that are planned to accommodate future residential development. These areas are shown in **Appendix 3**. The potential capacity for future dwellings was evaluated by the Attorney Generals Department in June 2020 and the findings of this are provided in Table 5.2.

The neighbouring townships of Port Elliot and Middleton have limited opportunities for growth. Goolwa has significant opportunities to accommodate growth based on the 30 Year Plan for Greater Adelaide..

Table 5.2 *Land Supply in Adjacent Areas*

Area	Development Ready	Undeveloped Zoned	Future Urban Growth Area
Goolwa	84	422	7,666
Hindmarsh Island	194	121	-
Middleton	-	3	145
Port Elliot	-	-	108
Total	278 allotments	546 allotments	7,919 allotments

Two Code Amendments that have been initiated which seek to rezone land within the above areas. These are the:

- Middleton Code Amendment which seeks to rezone 8.8 hectares from the Deferred Urban Zone to the Master Planned Township Zone; and
- Goolwa North Code Amendment which seeks to rezone 241 hectares from the Rural Zone to a neighbourhood-type zone.

The development of residential land within Port Elliot, Middleton and Hindmarsh Island is not expected to have a significant impact on demand for land within Victor Harbor, noting that that the market offering is generally different with each of these areas likely to have their own buyer profile for residential land.

The future rezoning of land within Goolwa North, particularly given its potential scale may affect demand for residential land within Victor Harbor noting that there has been no significant greenfield development within Goolwa for 23 years. Consequently, residential developments within Victor Harbor have not had to 'compete' with development in Goolwa in recent times. However, the impact on this demand is not likely to be realised in the short term, noting that:

- The Code Amendment for Goolwa North has just been initiated and still needs to go through a rigorous assessment process and community engagement before a decision is made by the Minister for Planning; and
- In the event that the Code Amendment is approved, it typically takes 5 to 10 years for land to become development ready (i.e., land division layouts designed, applied for, approved and roads and infrastructure constructed ready for dwellings to be built).

Therefore, the future population and housing model in this report, and its forecast demand for residential land, is unlikely to be affected by development of land within Alexandrina Council in the short to medium term.

5.7 Risks to Delivering Supply

Whilst there is capacity within both the existing and planned residential land supply to accommodate housing demand for the next 15 years, it is important to acknowledge that most of this supply is in the care and control of private land owners who may not develop their land. As a result, this supply may not be realised in the timeframe anticipated.

This risk is offset by ensuring that there is sufficient zoned land to ensure that there are multiple opportunities available for residential development to occur at any given time.

The *Planning Development and Infrastructure Act 2016* requires a minimum of 15 years supply of land be available outside of the Environment and Food Production Area. In addition, the State Government strategic documents referred to in section 2.3 of this report, suggest that having a minimum of 15 years of zoned supply is sufficient. This 15 year timeframe was previously based on the amount of time required between commencing a rezoning and making the land available to market. In more detail, it allows time for:

- The entire Code Amendment process required to rezone land;
- A development application for the division of land to be prepared, assessed and approved;
- The infrastructure to be designed and constructed; and
- The allotments to be deposited and released to the market.

In this regard, the 15 year 'benchmark' should be viewed as a minimum, and not a 'maximum'.

Therefore, Council may choose to reduce this risk of delivering supply to the market by rezoning in excess of 15 years residential land supply, which has occurred in other areas. This enables the market to respond to supply as needed, rather than constraining supply. Such has occurred in other areas of the State such as Riverlea Park where 865 hectares was rezoned for residential land in 2010 or Roseworthy where 334 hectares was rezoned in 2016.

5.8 Summary

Existing (zoned) residential land supply has the capacity to accommodate 3,609 to 4,144 dwellings including:

- The existing capacity of the neighbourhood/residential type zones shown on Figure 5.4 which includes:
  - » 521 vacant allotments; and
  - » 507 approved[41] allotments which will be able to accommodate a dwelling once infrastructure is constructed and the allotments are deposited.
- The future capacity of the existing neighbourhood/residential type zones shown on Figure 5.5 which includes:
  - » 251 proposed allotments;
  - » A further 1,385 to 1,920 potential allotments if/when vacant or underutilised land greater than 1 hectare is developed for residential purpose; and
  - » 945 potential allotments delivered through minor infill.

In addition, the planned (unzoned) supply has the capacity to accommodate a further 1,710 to 2,394 dwellings once the land is rezoned for residential purposes. This area is shown on Figure 5.6.

[41] Including 315 dwellings approved as part of a residential park at 97 – 107 Canterbury Road, Victor Harbor

The future population model detailed in section 4.7 of this report identifies that between 163 to 181 dwellings or allotments will be required annually, equating to a total of 2,445 to 2,715 dwellings over 15 years. Based on the annual rate of demand, the existing supply is expected to be exhausted within 20 to 25 years and the planned supply is expected to provide a further 9 to 15 years of residential supply. This is summarised in Table 5.3 below.

In addition, the existing zones anticipate a diverse range of housing, ensuring that small housing typologies can be accommodated.

Table 5.3 *Summary of Residential Land Supply*

<table>
<tr><th colspan="3">Supply Type</th><th>Potential Number of Dwellings</th><th>Years of Supply</th></tr>
<tr><td rowspan="5">Zoned/Existing Supply</td><td rowspan="2">Existing Capacity
(see Figure 5.4)</td><td>Vacant Allotments</td><td>521</td><td rowspan="5">20 to 25 years</td></tr>
<tr><td>Approved Allotments</td><td>507[42]</td></tr>
<tr><td rowspan="3">Future Capacity
(see Figure 5.5)</td><td>Proposed Allotments</td><td>251</td></tr>
<tr><td>Potential Yield of Vacant or Underutilised Land Greater than 1 hectare</td><td>1,385 to 1,920</td></tr>
<tr><td>Infill Potential[43]</td><td>945</td></tr>
<tr><td colspan="2">Total</td><td>3,609 to 4,144</td></tr>
<tr><td>Unzoned/Planned Supply</td><td colspan="2">Deferred Urban and Rural Zone Land
(see Figure 5.6)</td><td>1,710 to 2,394</td><td>9 to 15 years</td></tr>
<tr><td colspan="3">Total</td><td>5,319 to 6,538</td><td>29 to 40 years</td></tr>
</table>

[42] Including 315 dwellings approved as part of a residential park at 97 – 107 Canterbury Road, Victor Harbor
[43] Please note that overall infill potential is anticipated to be greater than this, however this is the forecast number of dwellings that is expected to be delivered over a 15 year period based on historical delivery rates of infill within the City of Victor Harbor.

Figure 5.4 *Existing Capacity within the Neighbourhood/Residential Type Zones*



Existing Capacity within Neighbourhood/ Residential Zone
- Victor Harbor

LEGEND
Zone boundary

Capacity to accommodate new dwellings
> 250 dwellings
> 125 dwellings
> 50 dwellings
< 50 dwellings

Note*
Including 315 dwellings approved as part of residential park

N

Figure 5.5 *Future Capacity within the Existing Neighbourhood/Residential Type Zones*

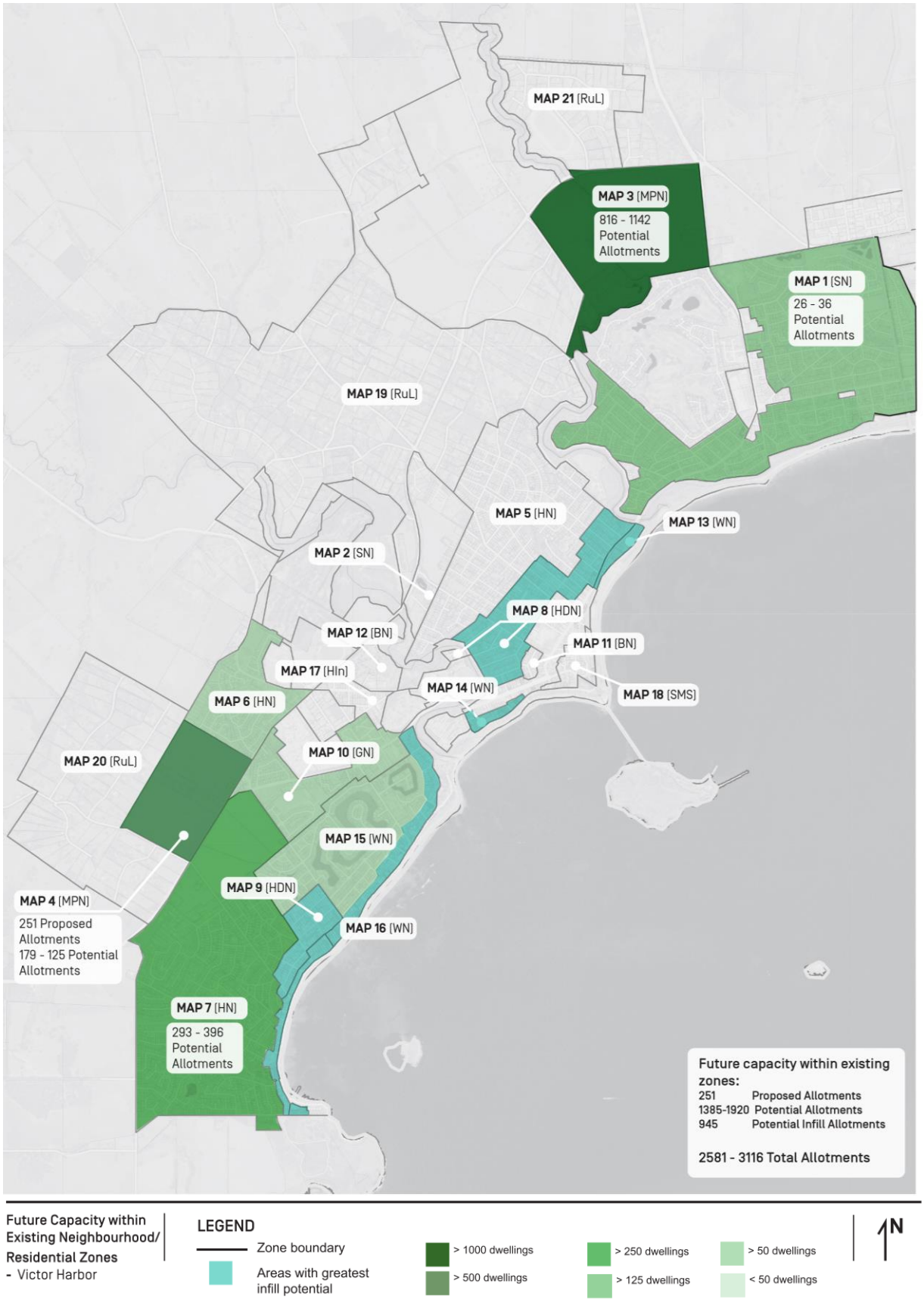
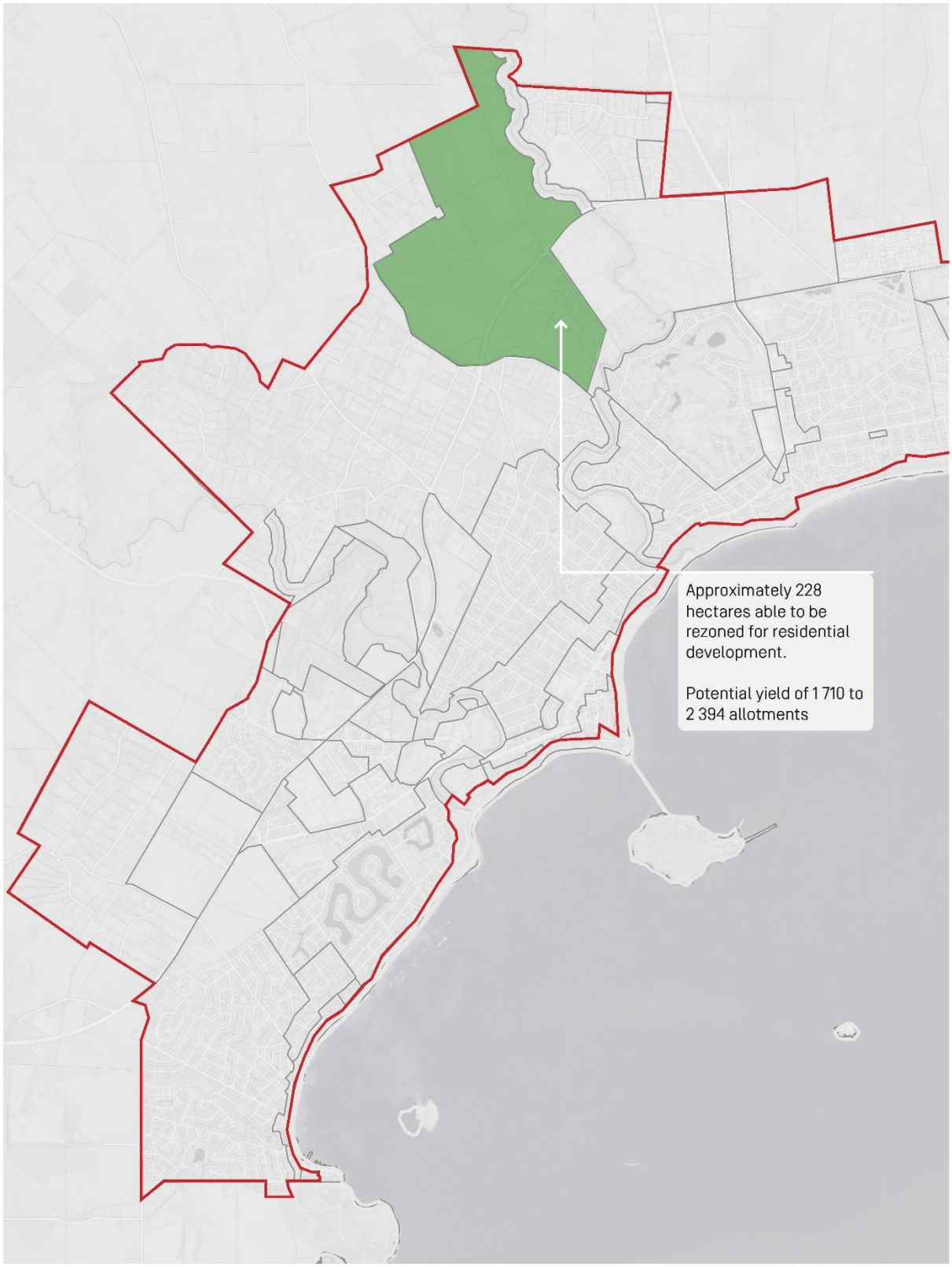


Figure 5.6 *Planned Residential Land Supply*



6. INFRASTRUCTURE

A high level of review of the availability of infrastructure has occurred to inform where extensions may be required to facilitate future development.

For each of the planned growth areas, detailed infrastructure investigations will be required which detail how the area will be serviced and the funding arrangements for its delivery, if required, as part of the rezoning process. Funding arrangements will typically require future infrastructure delivery costs to be borne by the developer.

The Housing Infrastructure Planning and Development Unit (HIPDU) has been established as part of the South Australian Government's Better Housing Future plan and will be charged with coordinating the provision of utilities such as electricity, water and sewage and public infrastructure such as roads and schools. Engagement with the HIPDU will be integral to any future rezoning process.

6.1 Water

SA Water owned mains are available within proximity to most areas planned to accommodate residential growth, as shown in Figure 6.1.

Extensions and new connections into SA Water's water supply network have been constrained for planned growth areas and accordingly, investigations supporting the rezoning of any planned residential supply will require liaison with SA Water at that time to understand any capacity constraints. It is expected the newly formed HIPDU will be charged with coordinating infrastructure investment for planned residential growth areas, with a view to resolving these capacity constraints to ensure they do not inhibit the ongoing supply of housing.

6.2 Wastewater

Victor Harbor is serviced by SA Water sewer mains, except for land within the Rural Living Zone, which is serviced by individual on-site waste water systems. The extent of the waste water system is shown in Figure 6.2.

Advice provided as part of the previous UGMS confirmed that there are significant gaps in the system network and that there were capacity restrictions for many future development areas. As a result, significant developer contributions will be required to augment the system.

6.3 Electricity

Electricity infrastructure is provided by SA Power Networks and extends to all growth areas.

6.4 Telecommunications

Victor Harbor is serviced by the National Broadband Network (NBN) (fibre to the premises). Telstra, Optus, and Vodafone all have telecommunications towers in Victor Harbor providing access to 4GX, 5G and 4G services respectively.

6.5 Stormwater

Future development within growth areas will be required to investigate means to manage stormwater to pre-development flows. Future land division will be assessed against the provisions of the Planning and Design Code and currently, the Code requires that land divisions creating more than 20 allotments include a stormwater management system designed to mitigate peak flows and manage the rate and duration of stormwater discharges from the site to ensure that the development does not increase the peak flows in downstream systems[44]. Where there is limited or no capacity in downstream systems, a development will need to dedicate land to accommodate the additional on-site detention of stormwater.

[44] Land Division Performance Outcome 10.1 in the Planning and Design Code, available here: https://code.plan.sa.gov.au/home/browse_the_planning_and_design_code?code=browse

Figure 6.1 *SA Water Mains Locations*

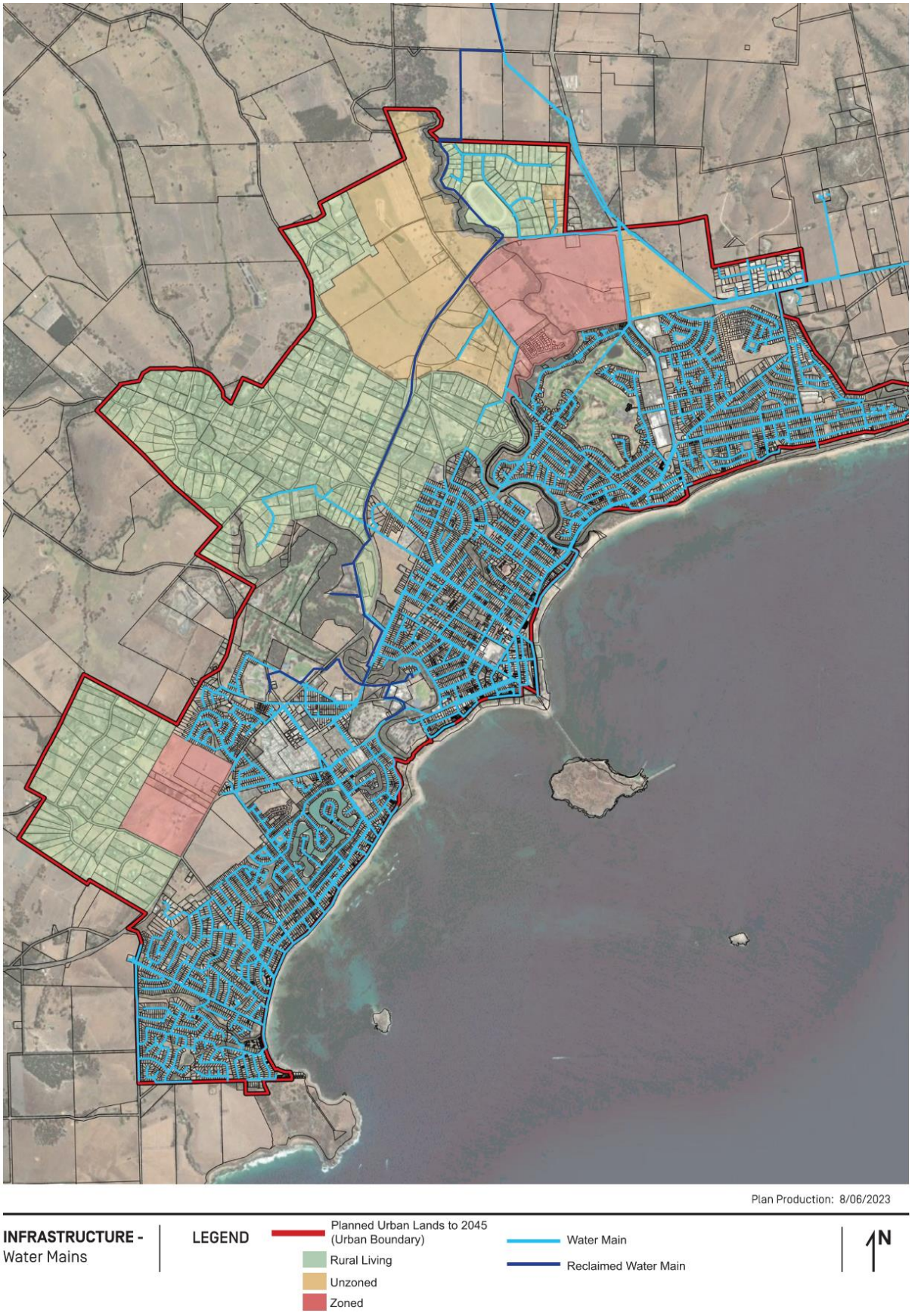


Figure 6.2 *SA Water Sewer Mains*

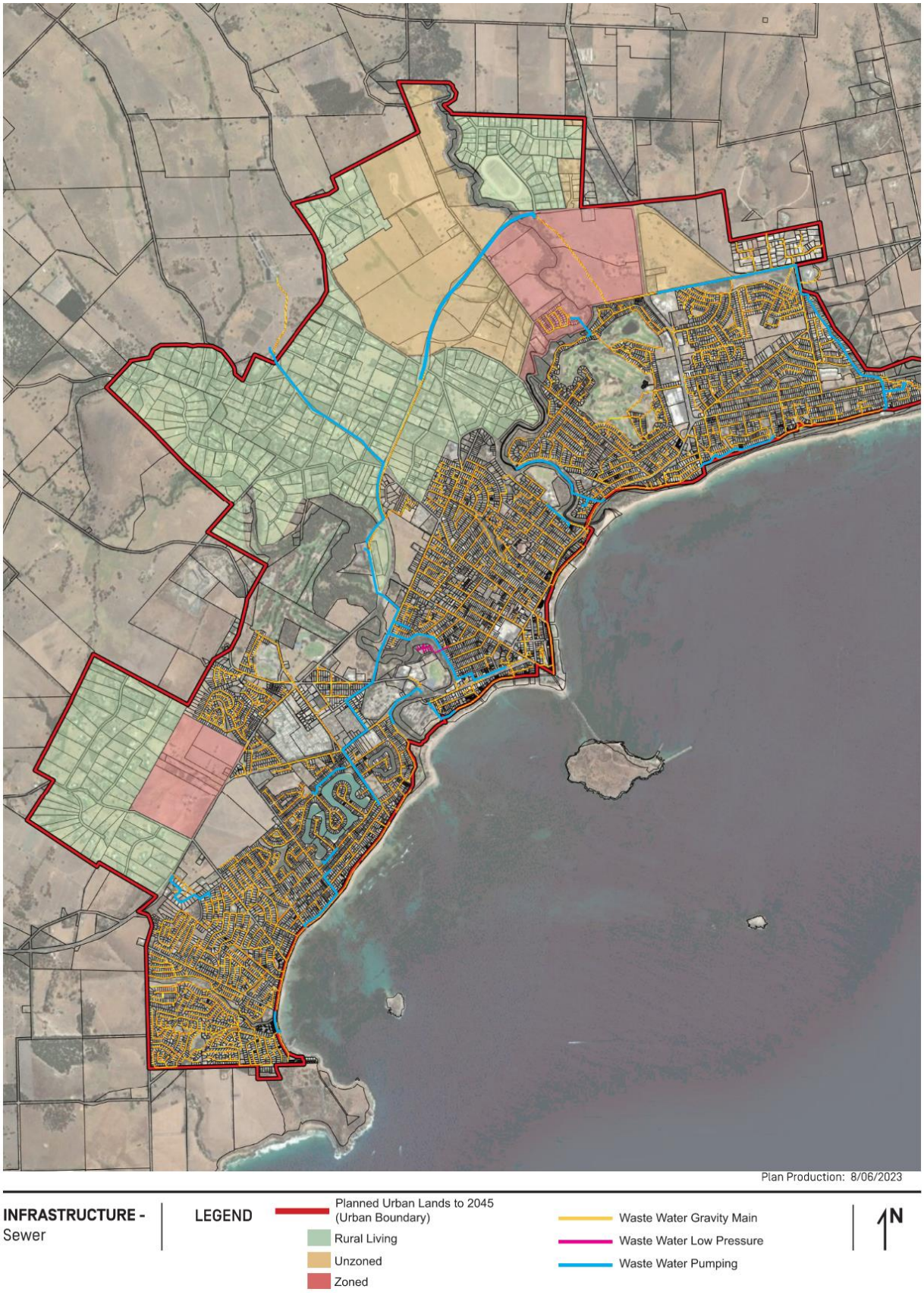
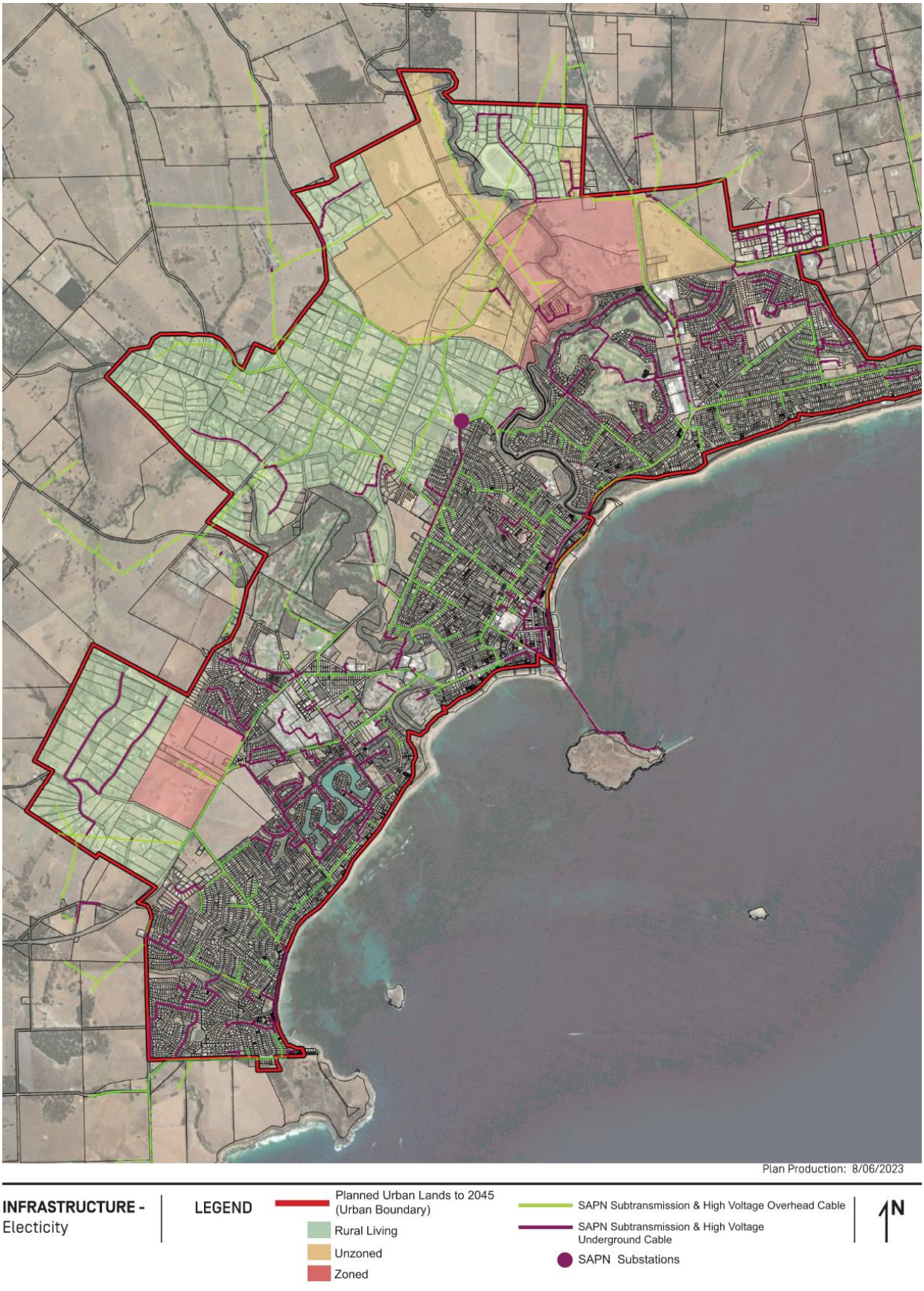


Figure 6.3 *Electricity Network*



7. CONCLUSION AND RECOMMENDATIONS

The purpose of this study is to inform Council on the demand and supply for residential land within the Council area and provide recommendations for the next 10 to 15 years.

In relation to demand for residential land, this study analysed population growth, demographic trends, development activity and market influences to understand the demand for dwellings over the next 10 to 15 years. This study identified that there will be demand for between 163 and 181 dwellings per annum within the Victor Harbor township, equating to a total of 2,445 to 2,715 dwellings over 15 years.

With respect to supply, the review of residential land supply within the Victor Harbor township confirmed that:

A. The existing zones anticipate a diverse range of housing, ensuring that small housing typologies can be accommodated;
B. Existing (zoned) residential land supply has the capacity to accommodate 3,609 to 4,144 dwellings on:
    - » 521 vacant allotments; and
    - » 507 approved[45] allotments which will be able to accommodate a dwelling once infrastructure is constructed and the allotments are deposited;
    - » 251 proposed allotments;
    - » A further 1,385 to 1,920 potential allotments if/when vacant or underutilised land greater than 1 hectare is developed for residential purposes; and
    - » 945 potential allotments delivered through minor infill.
C. Planned residential areas have the capacity to accommodate a further 1,710 to 2,394 dwellings once the land is rezoned for residential purposes.

A summary of the existing and planned residential land supply is provided on Figure 7.1.

Based on a consumption rate of 163 to 181 dwellings[46], supply within the existing zoned residential areas will be exhausted within 20 to 25 years. In addition, the future planned supply has the capacity to provide a further 1,710 to 2,394 allotments which will provide a further 9 to 15 years of residential land supply.

Having regard to the findings of this report and the guiding principles above, no additional growth areas are recommended given there is in excess of 15 years of residential land supply within the existing residential areas.

On this basis, it is recommended that:

- Council monitor residential land consumption rates and delivery of residential supply on an annual basis to evaluate when the planned residential land supply should be rezoned for residential purposes; and
- Commence the rezoning of the planned supply no later than 2027[47] to ensure that a minimum rolling supply of 15 years is provided; and
- Council consider rezoning earlier than 2027 to provide more than a 15 year supply, and maximise the opportunity for supply to be delivered to the market.

Table 7.1 provides the recommended timeframes for rezoning of land if the consumption of land occurs at a quicker or slower rate than the forecast growth scenarios.

[45] Including 315 dwellings approved as part of a residential park at 97 – 107 Canterbury Road, Victor Harbor
[46] See section 4.6 for the rationale behind this consumption rate
[47] Based on land being consumed at a rate of 163 to 181 dwellings per annum and a low supply delivery occurring, as detailed in Table 7.1.

Figure 7.1 *Residential Land Supply Summary*

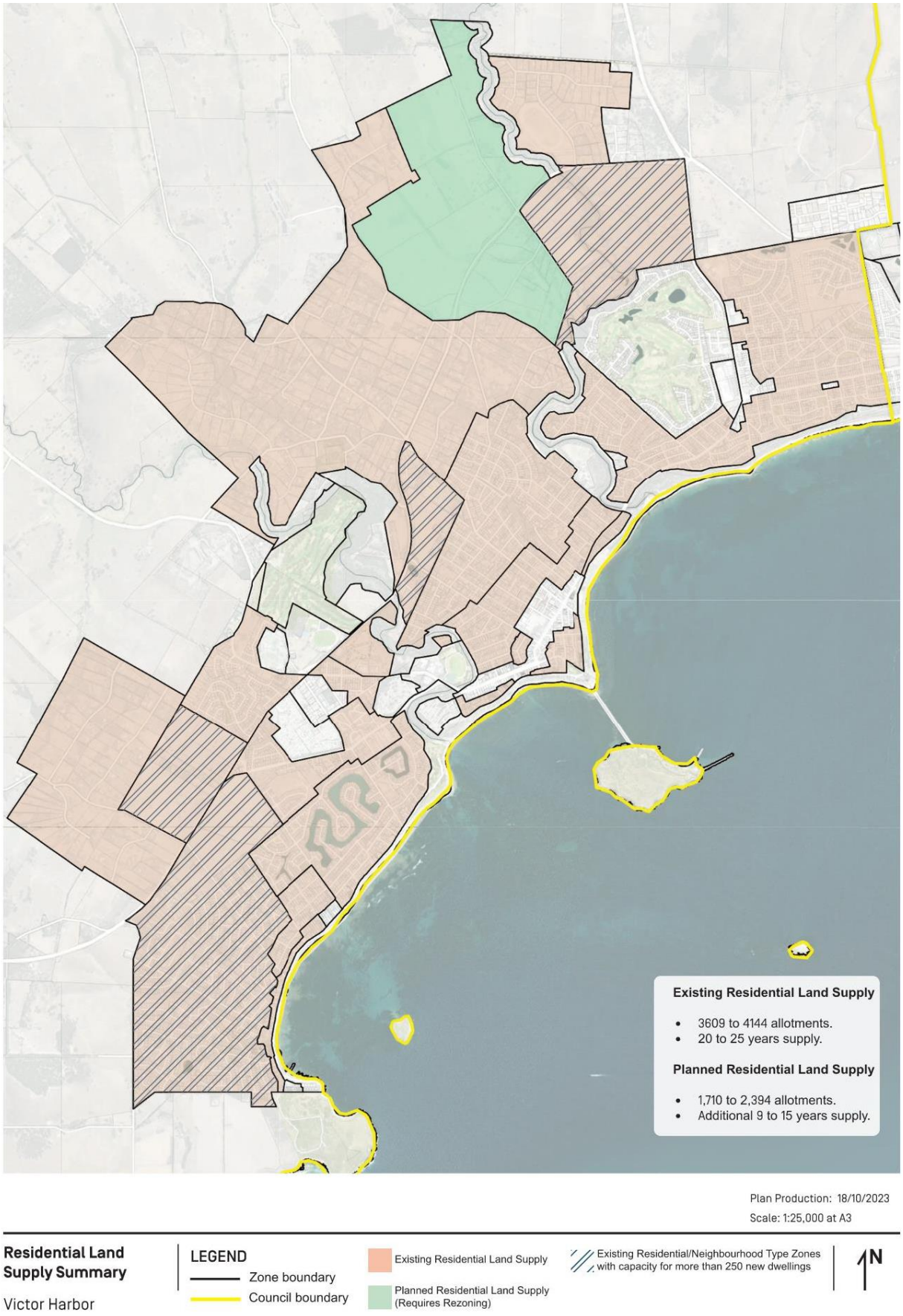


Table 7.1 *Recommended Timing to Commence Rezoning Based on Residential Consumption and Supply Delivery Scenarios*

Land Consumption	**Residential Supply Delivery**		**Timing to Commence Rezoning Planned Supply**
	Description	Scenario	
Land consumption occurring higher than forecast *(More than 181 dwellings being approved/constructed per annum)*	High Supply Delivery	Greenfield development occurring at a density of approximately 10.5 dwellings per hectare Infill occurring at a rate of more than 100 dwellings per annum	No later than 2034
	Average Supply Delivery	Greenfield development occurring at a density of between 7.5 to 10.5 dwellings per hectare Infill occurring at a rate of 55 to 70 dwellings per annum	No later than 2028
	Low Supply Delivery	Greenfield development occurring at a density of approximately 7.5 dwellings per hectare Infill occurring at a rate of less than 50 dwellings per annum	No later than 2027
Land consumption occurring at the forecast rate *(Between 163 to 181 dwellings being approved/constructed per annum)*	High Supply Delivery	Greenfield development occurring at a density of approximately 10.5 dwellings per hectare Infill occurring at a rate of more than 100 dwellings per annum	Between 2034 and 2037
	Average Supply Delivery	Greenfield development occurring at a density of between 7.5 to 10.5 dwellings per hectare Infill occurring at a rate of 55 to 70 dwellings per annum	Between 2028 and 2033
	Low Supply Delivery	Greenfield development occurring at a density of approximately 7.5 dwellings per hectare Infill occurring at a rate of less than 50 dwellings per annum	Between 2027 and 2029

Land Consumption	Residential Supply Delivery		Timing to Commence Rezoning Planned Supply
	Description	Scenario	
Land consumption occurring at a lower rate than forecast *(Less than 163 dwellings being approved/constructed per annum)*	High Supply Delivery	Greenfield development occurring at a density of approximately 10.5 dwellings per hectare Infill occurring at a rate of more than 100 dwellings per annum	After 2037
	Average Supply Delivery	Greenfield development occurring at a density of between 7.5 to 10.5 dwellings per hectare Infill occurring at a rate of 55 to 70 dwellings per annum	After 2030
	Low Supply Delivery	Greenfield development occurring at a density of approximately 7.5 dwellings per hectare Infill occurring at a rate of less than 50 dwellings per annum	After 2029

APPENDIX 1. EXISTING RESIDENTIAL LAND SUPPLY

Plan Production: 15/06/2023

Scale: 1:80,000 at A3

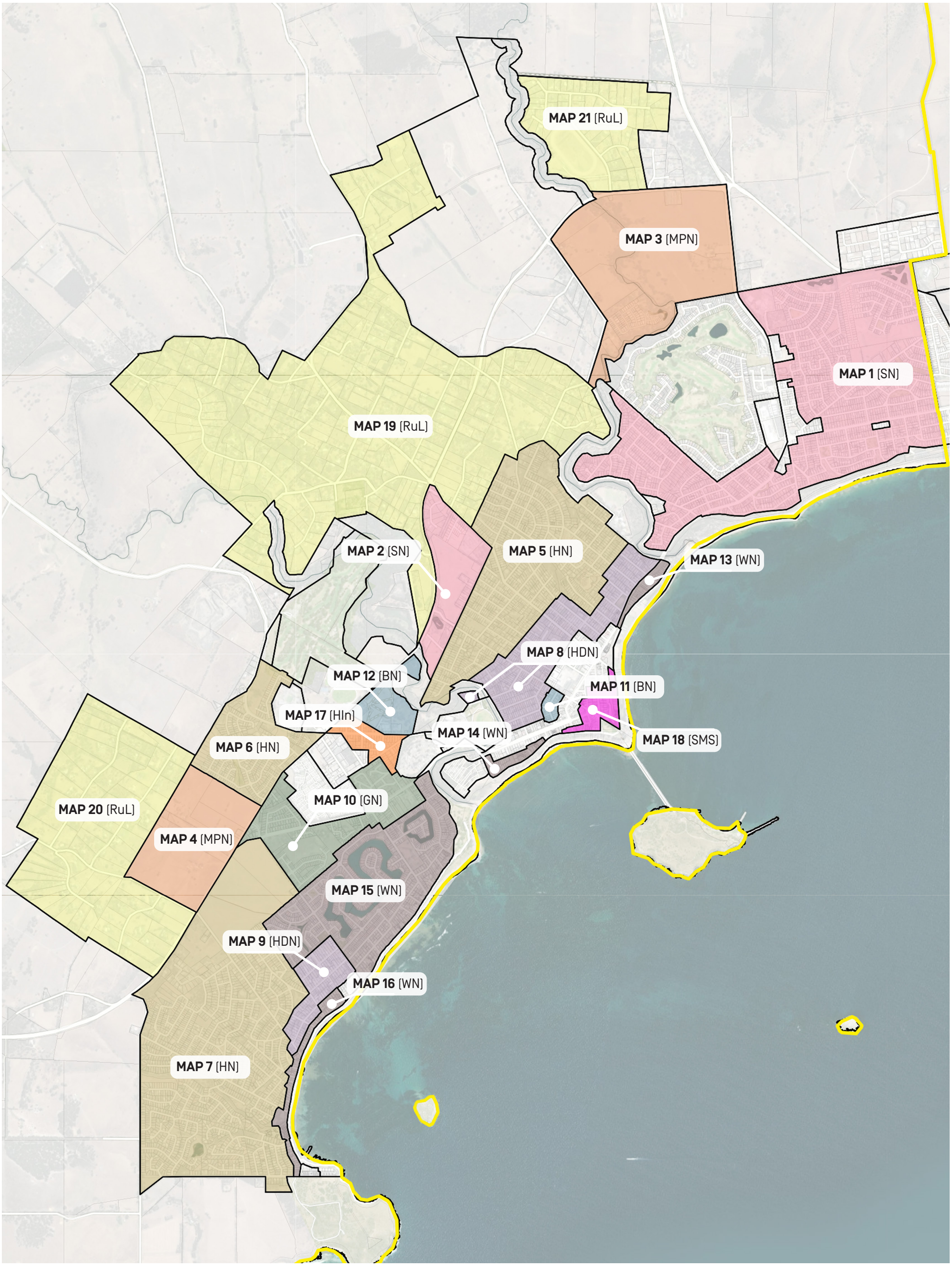
Neighbourhood & Residential Type Zones

- Victor Harbor

LEGEND

- Zone boundary
- Council boundary
- General Neighbourhood Zone (GN)
- Master Planned Neighbourhood Zone (MPN)
- Hills Neighbourhood Zone (HN)
- Housing Diversity Neighbourhood Zone (HDN)
- Waterfront Neighbourhood Zone (WN)
- Business Neighbourhood Zone (BN)
- Suburban Neighbourhood Zone (SN)
- Home Industry Zone (HIn)
- Suburban Main Street Zone (SMS)
- Rural Living Zone (RuL)

N



Plan Production: 15/06/2023

Scale: 1:25,000 at A3

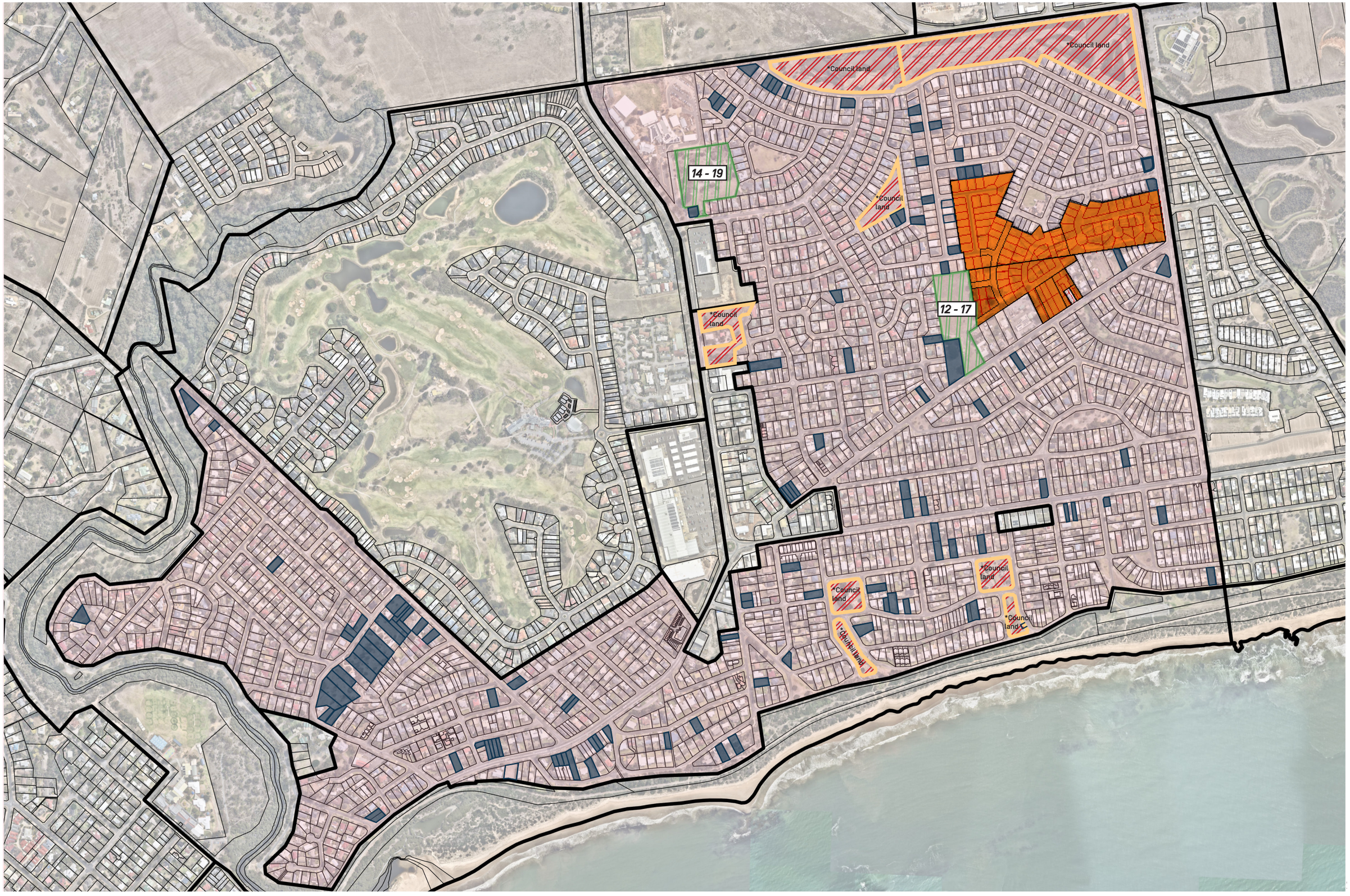
Neighbourhood & Residential Type Zones

- Victor Harbor

LEGEND

- Zone boundary
- Council boundary
- General Neighbourhood Zone (GN)
- Master Planned Neighbourhood Zone (MPN)
- Hills Neighbourhood Zone (HN)
- Housing Diversity Neighbourhood Zone (HDN)
- Waterfront Neighbourhood Zone (WN)
- Business Neighbourhood Zone (BN)
- Suburban Neighbourhood Zone (SN)
- Home Industry Zone (HIn)
- Suburban Main Street Zone (SMS)
- Rural Living Zone (RuL)

N



MAP 1 - Suburban Neighbourhood Zone **[SN]**

LEGEND

Zone boundary

Suburban Neighbourhood Zone (SN)

Approved Allotments

Site not likely to accommodate residential development.

Potential development site

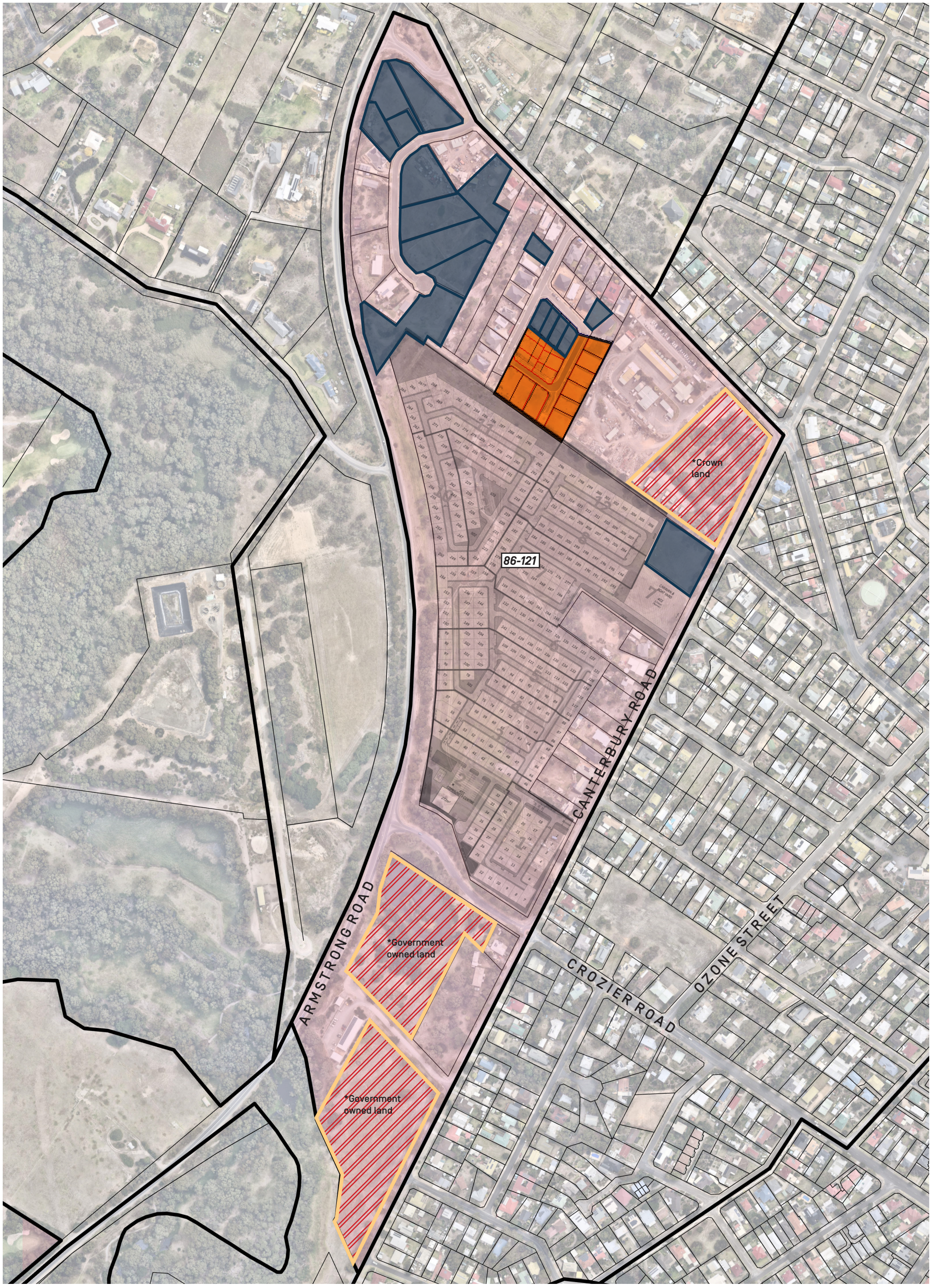
- # - Potential Development Yields

Vacant

Plan Production: 15/06/2023

Scale: 1:8000 at A3

N



Plan Production: 15/06/2023 Scale: 1:4000 at A3 **#-#** - Potential Development Yields

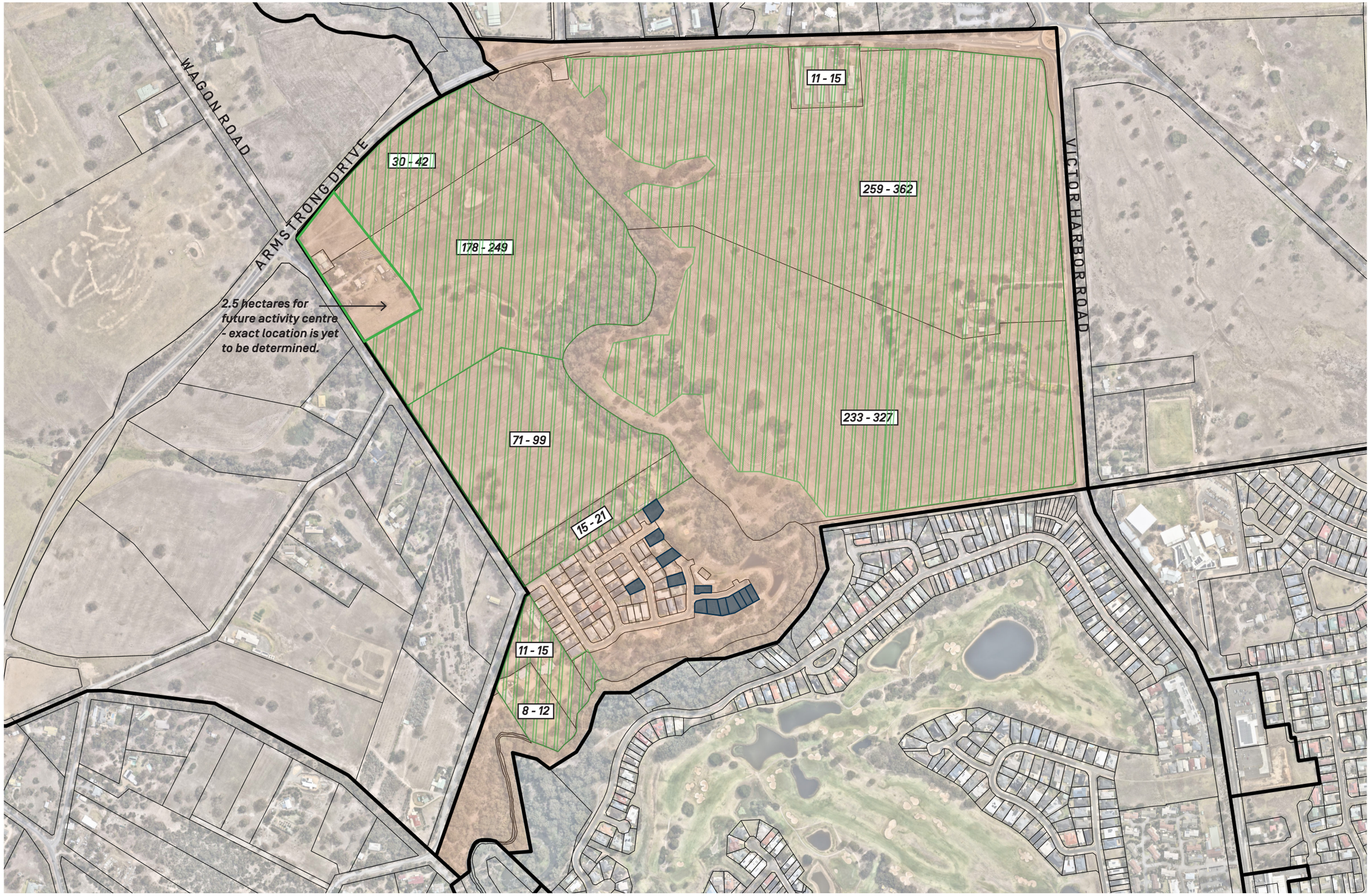
MAP 2 - Suburban Neighbourhood Zone **(SN)**

LEGEND

- Zone boundary
- Suburban Neighbourhood Zone (SN)
- Site not likely to accommodate residential development.
- Approved Allotments
- Potential development site
- Vacant

Note: 315 dwellings approved as part of a residential park

N



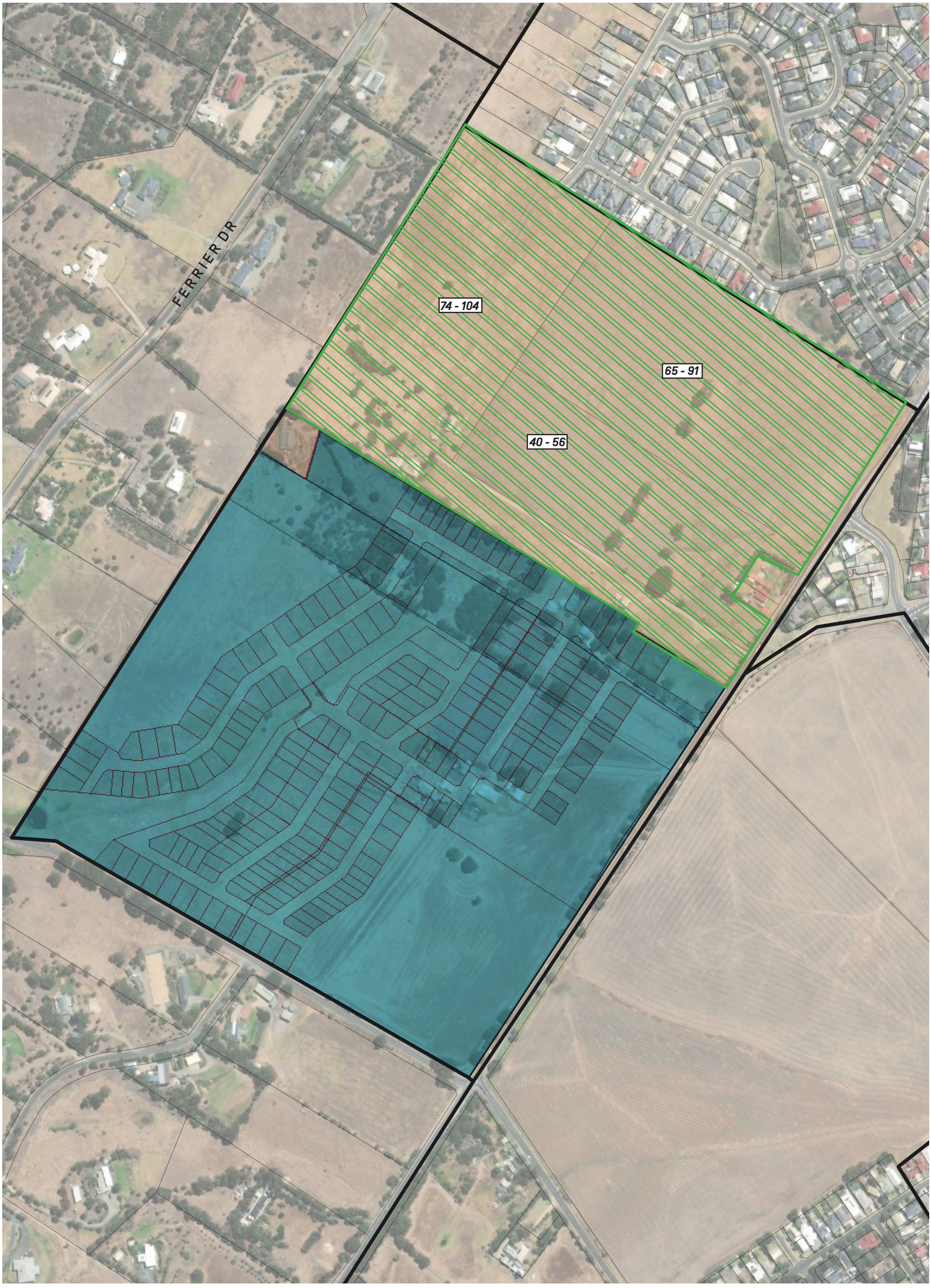
MAP 3 - Master Planned Neighbourhood Zone **(MPN)**

LEGEND

- Zone boundary
- Master Planned Neighbourhood Zone (MPN)
- Potential development site
- Vacant

Plan Production: 15/06/2023 Scale: 1:6000 at A3

N



Plan Production: 15/06/2023 Scale: 1:4000 at A3

MAP 4 - Master Planned Neighbourhood Zone **(MPN)**

LEGEND

Zone boundary

Land Division Applications

Proposals

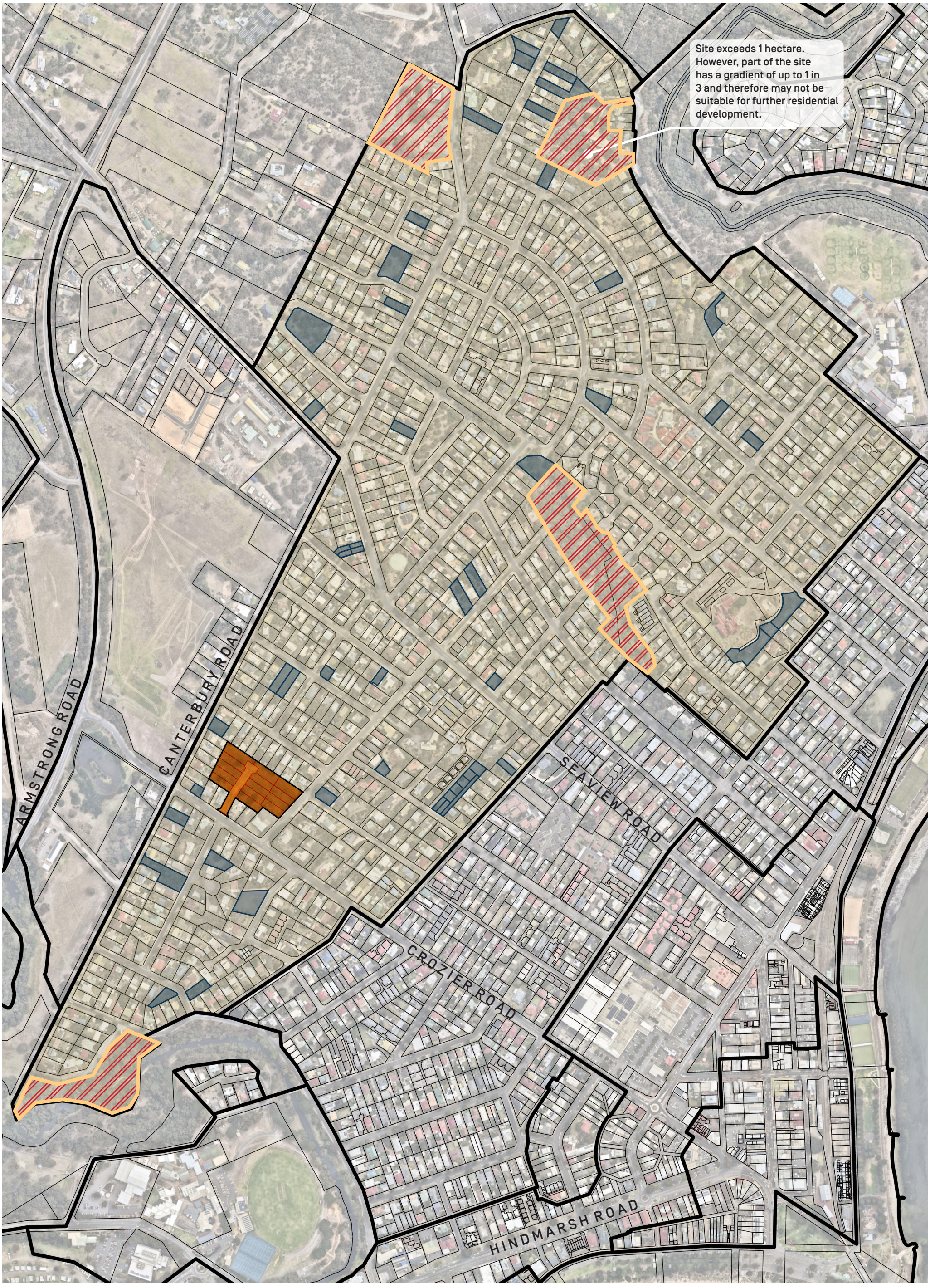
Proposed Allotments

Potential Development site

- # - Potential Development Yields

Master Planned Neighbourhood Zone (MPN)

N



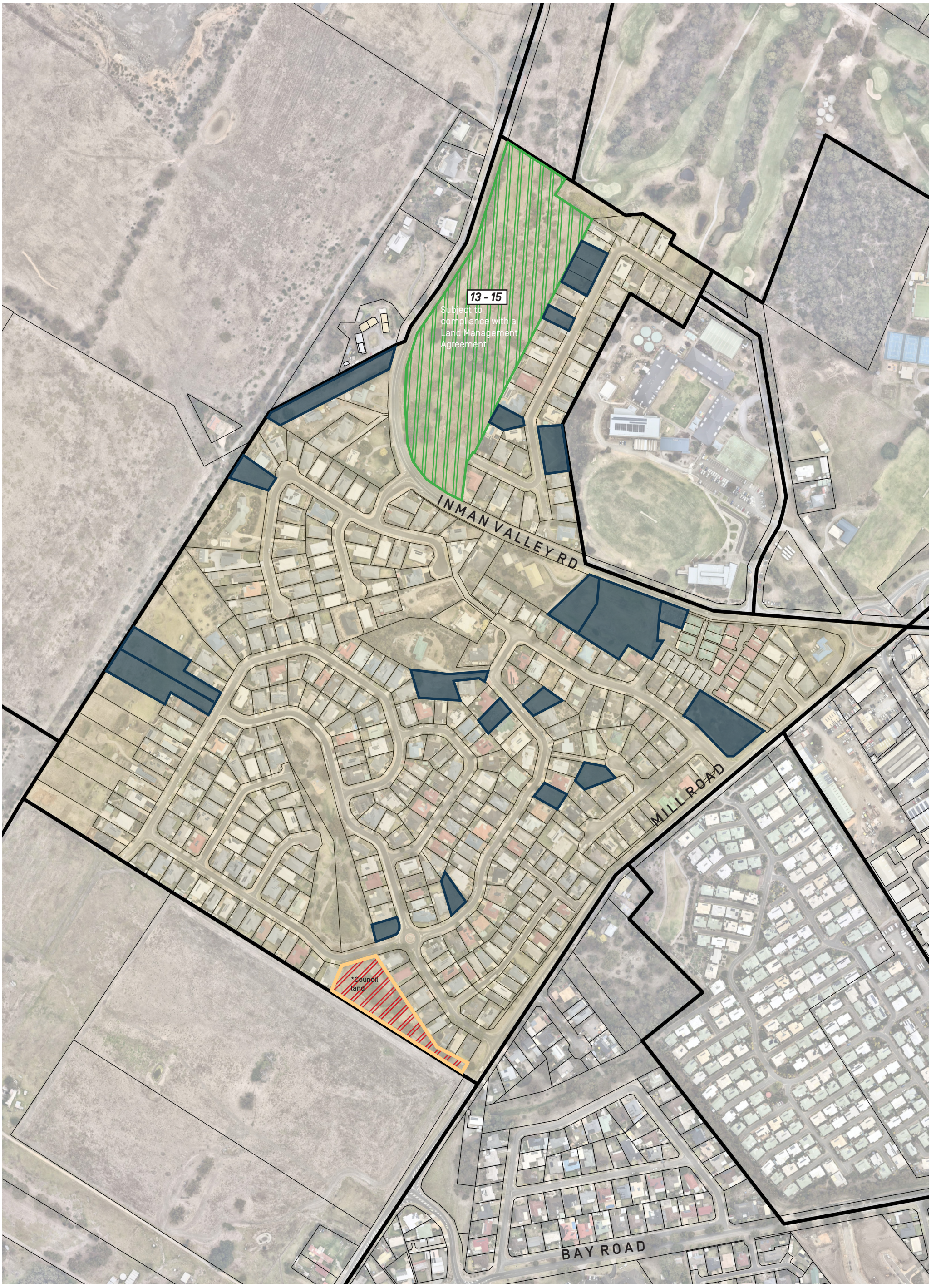
Plan Production: 15/06/2023 Scale: 1:6000 at A3

MAP 5 - Hills Neighbourhood Zone **(HN)**

LEGEND

- Zone boundary
- **Land Division Applications**
  - Proposals
- Hills Neighbourhood Zone (HN)
- Vacant
- Site not likely to accommodate residential development.
- Approved Allotments

N



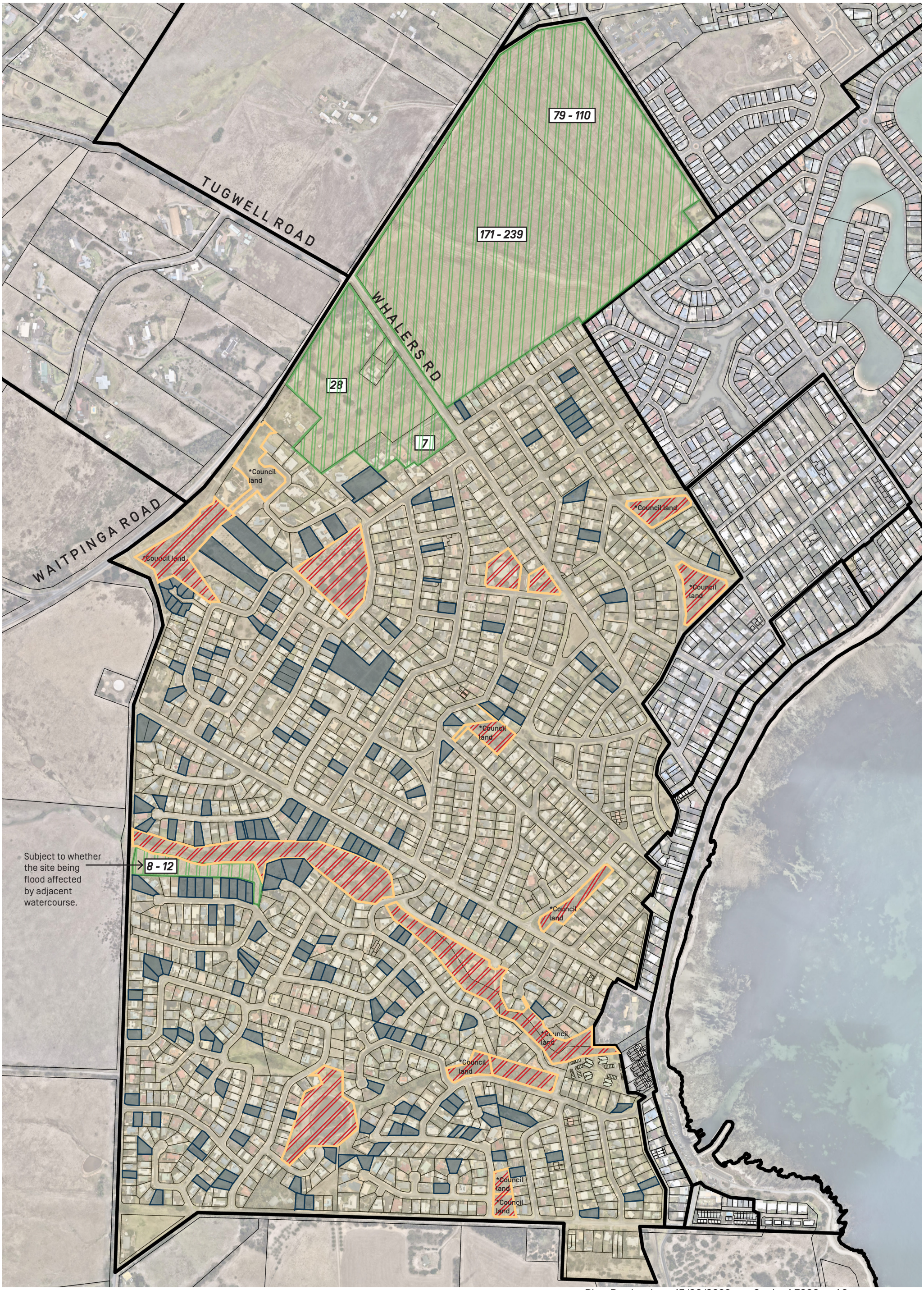
Plan Production: 15/06/2023 Scale: 1:4000 at A3

MAP 6 - Hills Neighbourhood Zone **(HN)**

LEGEND

- Zone boundary
- Potential Development site
- Hills Neighbourhood Zone (HN)
- Site not likely to accommodate residential development.
- #-# - Potential Development Yields
- Vacant

N



Plan Production: 15/06/2023 Scale: 1:7000 at A3

MAP 7 - Hills Neighbourhood Zone **(HN)**

LEGEND

- Zone boundary
- Vacant
- Hills Neighbourhood Zone (HN)
- # - # - Potential Development Yields
- Site not likely to accommodate residential development.
- Potential Development site

N



MAP 8 - Housing Diversity Neighbourhood Zone **(HDN)**

LEGEND

- Zone boundary
- Site not likely to accommodate residential development.
- Housing Diversity Neighbourhood Zone (HDN)
- Vacant

Plan Production: 15/06/2023 Scale: 1:6000 at A3

N



MAP 9 - Housing Diversity Neighbourhood Zone **(HDN)**

LEGEND

Zone boundary

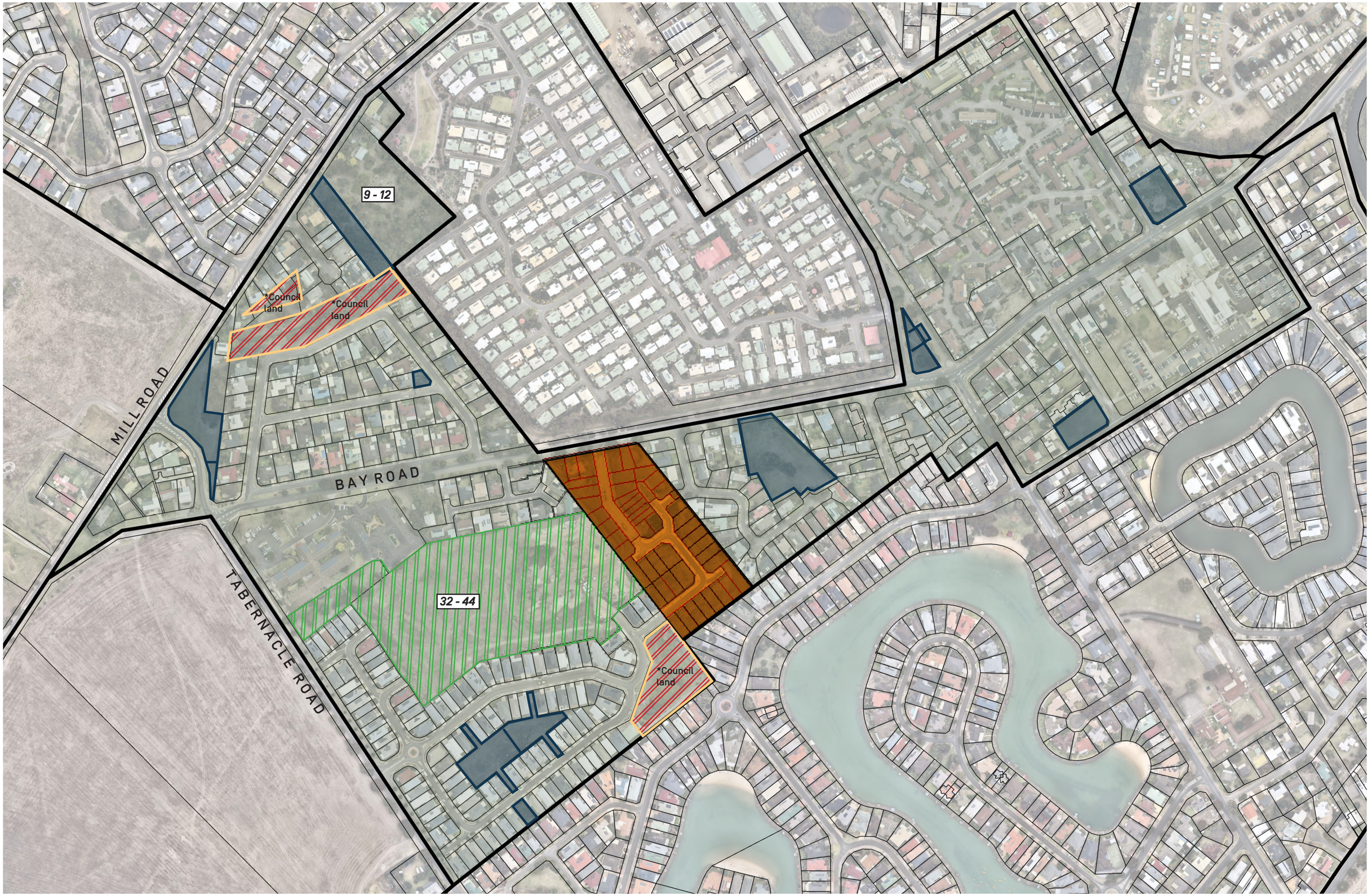
Housing Diversity Neighbourhood Zone (HDN)

Vacant

Plan Production: 15/06/2023

Scale: 1:2500 at A3

N



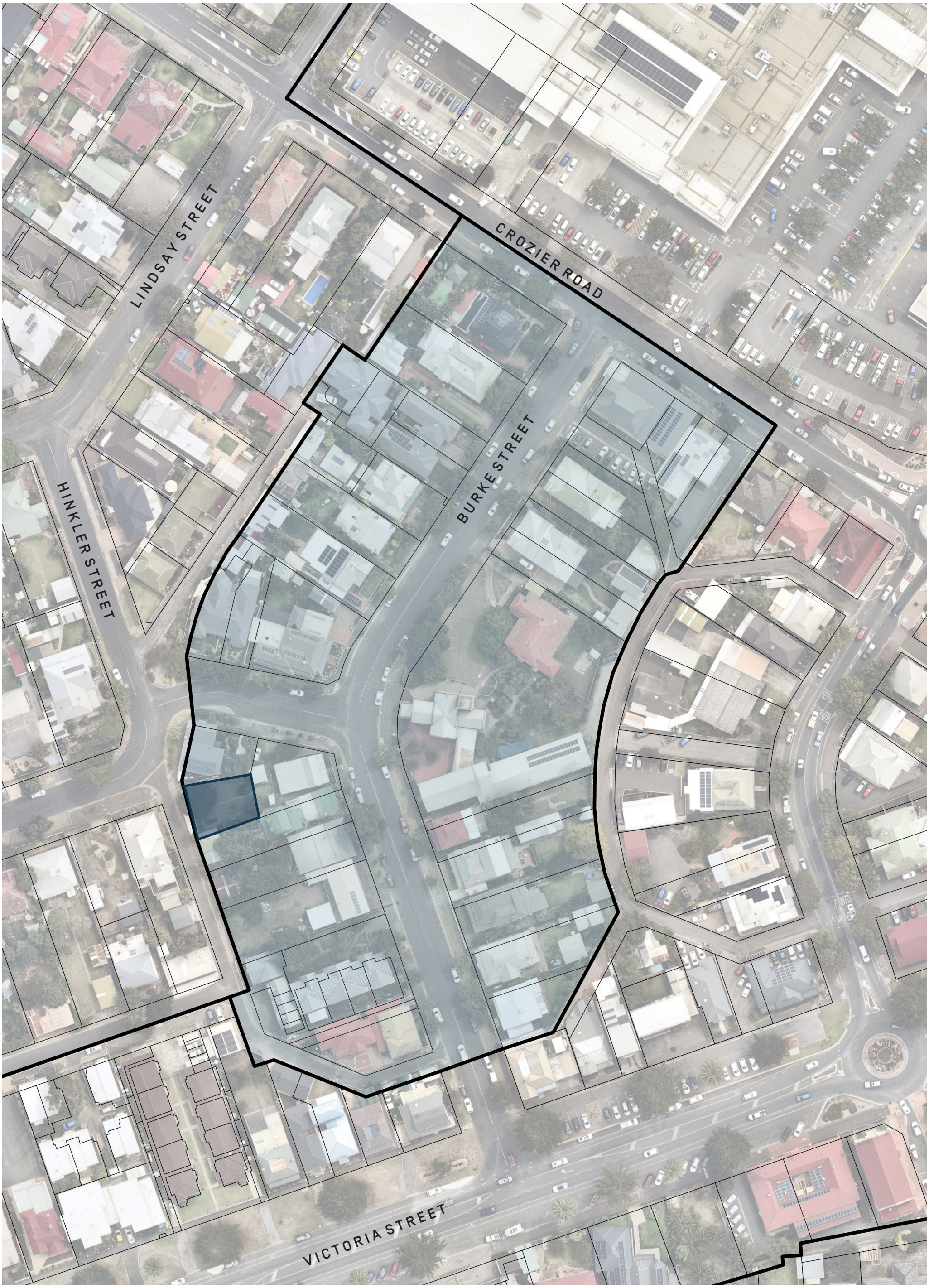
MAP 10 - General Neighbourhood Zone **(GN)**

LEGEND

- Zone boundary
- Approved Allotments
- General Neighbourhood Zone (GN)
- Vacant
- # - # - Potential Development Yields
- Potential Development site
- Site not likely to accommodate residential development.

Plan Production: 15/06/2023 Scale: 1:4000 at A3

N



Plan Production: 15/06/2023 Scale: 1:1000 at A3

MAP 11 - Business Neighbourhood Zone **(BN)**

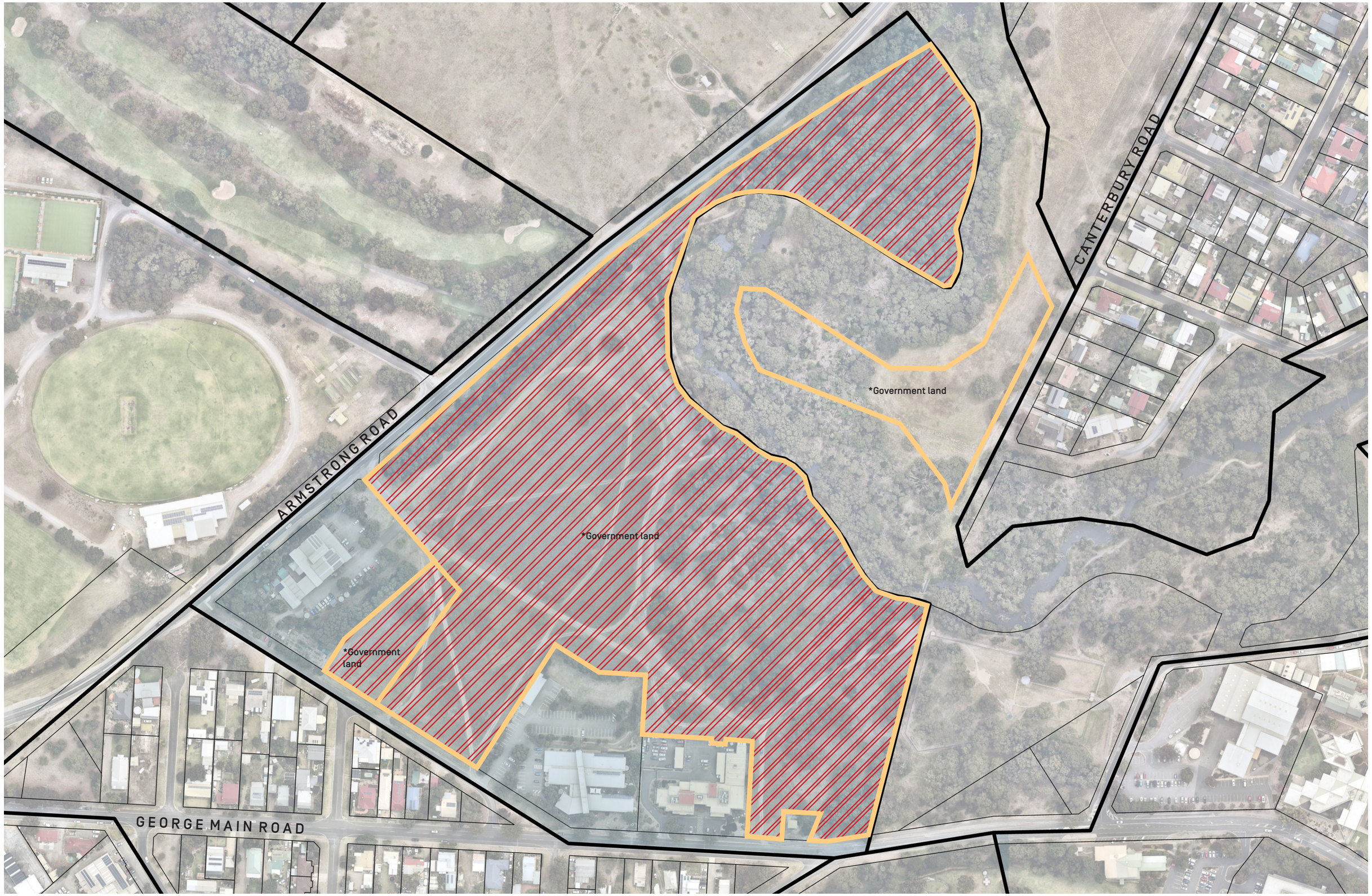
LEGEND

Zone boundary

Business Neighbourhood Zone (BN)

Vacant

N



MAP 12 - Business Neighbourhood Zone **(BN)**

LEGEND

Zone boundary

Business Neighbourhood Zone (BN)

Vacant

Site not likely to accommodate residential development.

Plan Production: 15/06/2023

Scale: 1:2500 at A3

N



Plan Production: 15/06/2023 Scale: 1:2000 at A3

MAP 13 - Waterfront Neighbourhood Zone **(WN)**

LEGEND

Zone boundary

Waterfront Neighbourhood Zone (WN)

Vacant

N



MAP 14 - Waterfront Neighbourhood Zone **(WN)**

LEGEND

Zone boundary

Waterfront Neighbourhood Zone (WN)

Vacant

Plan Production: 15/06/2023 Scale: 1:1500 at A3

N



MAP 15 - Waterfront Neighbourhood Zone **(WN)**

LEGEND

Zone boundary

Waterfront Neighbourhood Zone (WN)

Vacant

#-# - Potential Development Yields

Plan Production: 15/06/2023 Scale: 1:6000 at A3

N



Plan Production: 15/06/2023 Scale: 1:4000 at A3

MAP 16 - Waterfront Neighbourhood Zone **(WN)**

LEGEND

Zone boundary

Waterfront Neighbourhood Zone (WN)

Vacant

N

Please note that the vacant sites on this map were not included in the number of vacant allotments that can readily accommodate a dwelling.

MAP 17 - Home Industry Zone **(HIn)**

LEGEND

Zone boundary

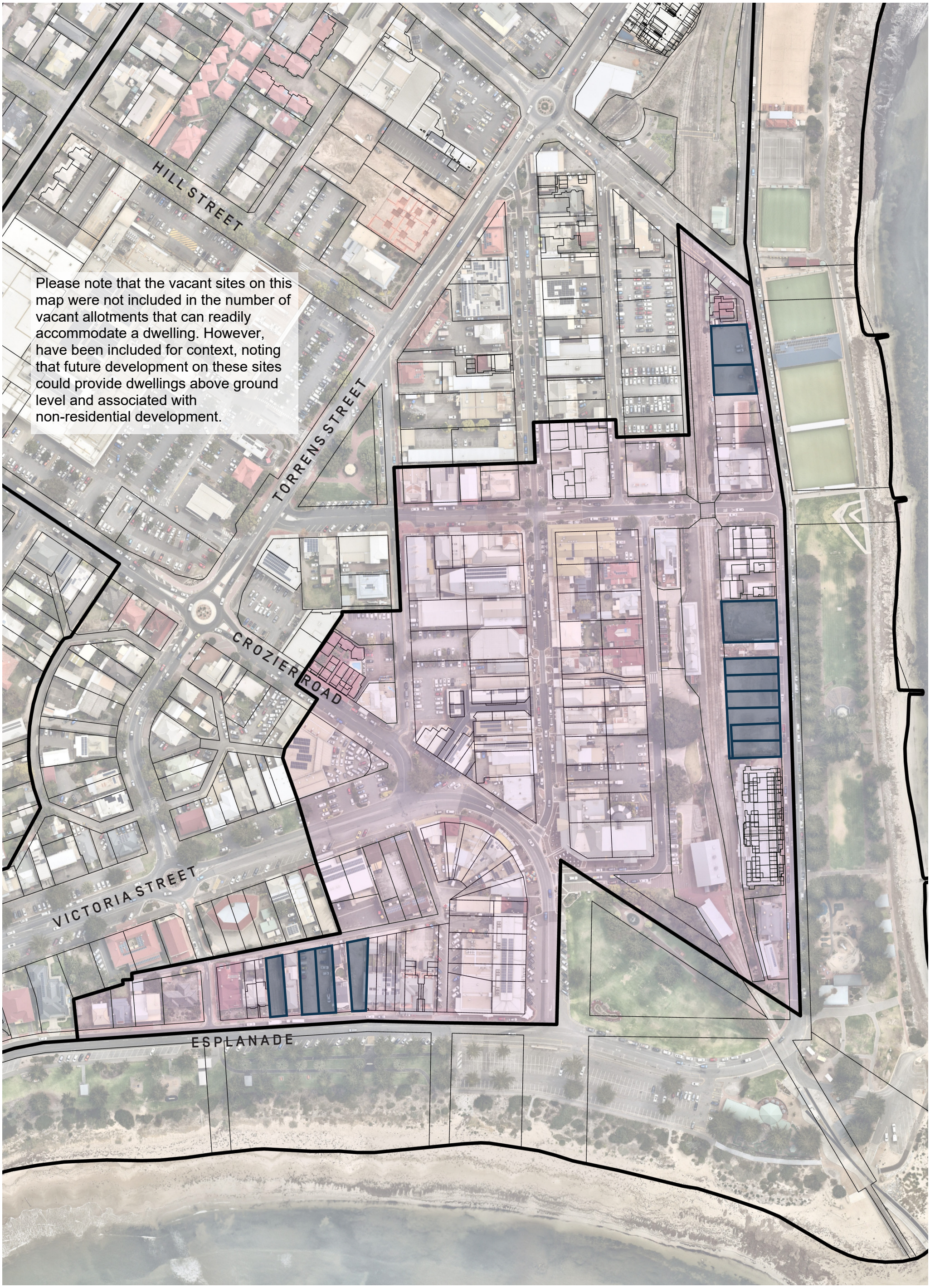
Home Industry Zone (HIn)

Vacant

Plan Production: 15/06/2023

Scale: 1:2000 at A3

N



Plan Production: 15/06/2023 Scale: 1:2000 at A3

MAP 18 - Suburban Main Street Zone **(SMS)**

LEGEND

Zone boundary

Suburban Main Street Zone (SMS)

Vacant

N

Plan Production: 15/06/2023 Scale: 1:15,000 at A3

MAP 19 - Rural Living Zone **(RuL)**

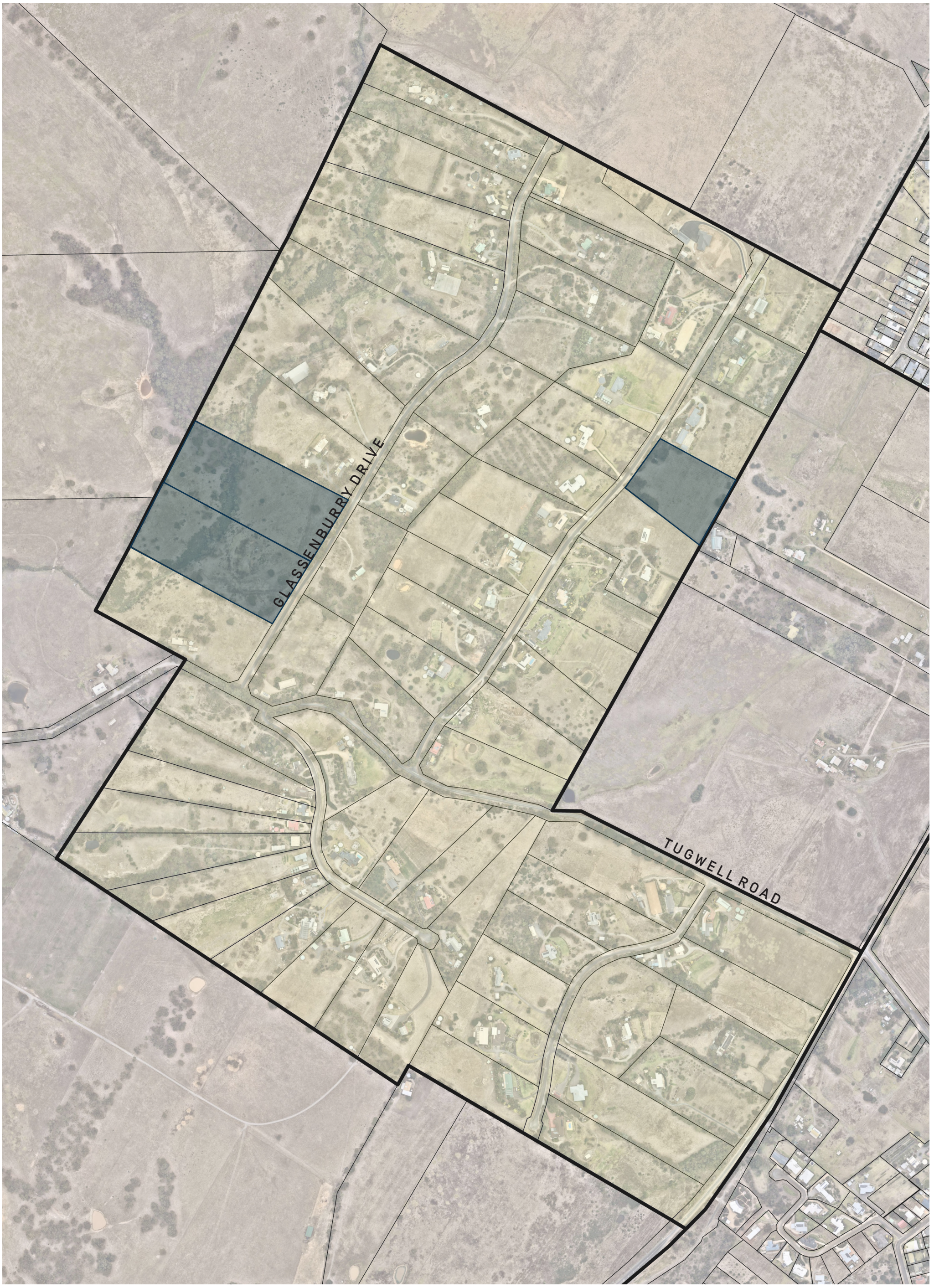
LEGEND

Zone boundary

Rural Living Zone (RuL)

Vacant

N



Plan Production: 15/06/2023 Scale: 1:6000 at A3

MAP 20 - Rural Living Zone **(RuL)**

LEGEND

Zone boundary

Rural Living Zone (RuL)

Vacant

N

LIPIZZANER DRIVE

WAGGON ROAD

WELCH ROAD

MAP 21 - Rural Living Zone **(RuL)**

LEGEND

Zone boundary

Rural Living Zone (RuL)

Vacant

Site not likely to accommodate residential development.

Plan Production: 15/06/2023

Scale: 1:5000 at A3

N

APPENDIX 2. SUMMARY OF EXISTING RESIDENTIAL LAND SUPPLY

Existing Capacity within the Neighbourhood/Residential Type Zones (Figure 5.4)					
Vacant Allotments			Approved Allotments		Existing Capacity Total
Map 1	121		Map 1	114	235
Map 2	19		Map 2	330	349
Map 3	13		Map 3	0	13
Map 4	0		Map 4	0	0
Map 5	52		Map 5	14	66
Map 6	21		Map 6	0	21
Map 7	205		Map 7	0	205
Map 8	8		Map 8	0	8
Map 9	5		Map 9	0	5
Map 10	11	+	Map 10	49	= 60
Map 11	1		Map 11	0	1
Map 12	0		Map 12	0	0
Map 13	0		Map 13	0	0
Map 14	6		Map 14	0	6
Map 15	18		Map 15	0	18
Map 16	1		Map 16	0	1
Map 17	4		Map 17	0	4
Map 18	0		Map 18	0	0
Map 19	30		Map 19	0	30
Map 20	3		Map 20	0	3
Map 21	3		Map 21	0	3
TOTAL	**521**		**TOTAL**	**507**	**1028**

Future Capacity within the Neighbourhood/Residential Type Zones (Figure 5.5)							
Proposed Allotments			Development Potential			Future Capacity Total	
				Min	Max	Min	Max
Map 1	0		Map 1	26	36	26	36
Map 2	0		Map 2	0	0	0	0
Map 3	0		Map 3	816	1142	816	1142
Map 4	251		Map 4	179	251	430	502
Map 5	0		Map 5	0	0	0	0
Map 6	0		Map 6	13	15	13	15
Map 7	0		Map 7	293	396	293	396
Map 8	0		Map 8	0	0	0	0
Map 9	0		Map 9	0	0	0	0
Map 10	0	+	Map 10	41	56	= 41	56
Map 11	0		Map 11	0	0	0	0
Map 12	0		Map 12	0	0	0	0
Map 13	0		Map 13	0	0	0	0
Map 14	0		Map 14	0	0	0	0
Map 15	0		Map 15	17	24	17	24
Map 16	0		Map 16	0	0	0	0
Map 17	0		Map 17	0	0	0	0
Map 18	0		Map 18	0	0	0	0
Map 19	0		Map 19	0	0	0	0
Map 20	0		Map 20	0	0	0	0
Map 21	0		Map 21	0	0	0	0
TOTAL	**251**		**TOTAL**	**1385**	**1920**	**1636**	**2171**

	Min. Allotments	Max. Allotments
Vacant Allotments	521	521
Approved Allotments	507	507
Proposed Allotments	251	251
Development Potential	1385	1920
Total:	2664	3199
Infill Potential	945	945
Total	3609	4144
Consumption of Land	**Years**	**Years**
163 dw/yr	22	25
181 dw/yr	20	23

APPENDIX 3. PLANNED RESIDENTIAL LAND SUPPLY IN ADJACENT AREAS

Future Urban Growth Areas

Port Elliot

LEGEND

Planned Urban Lands to 2045 (Urban Boundary)

Zoned

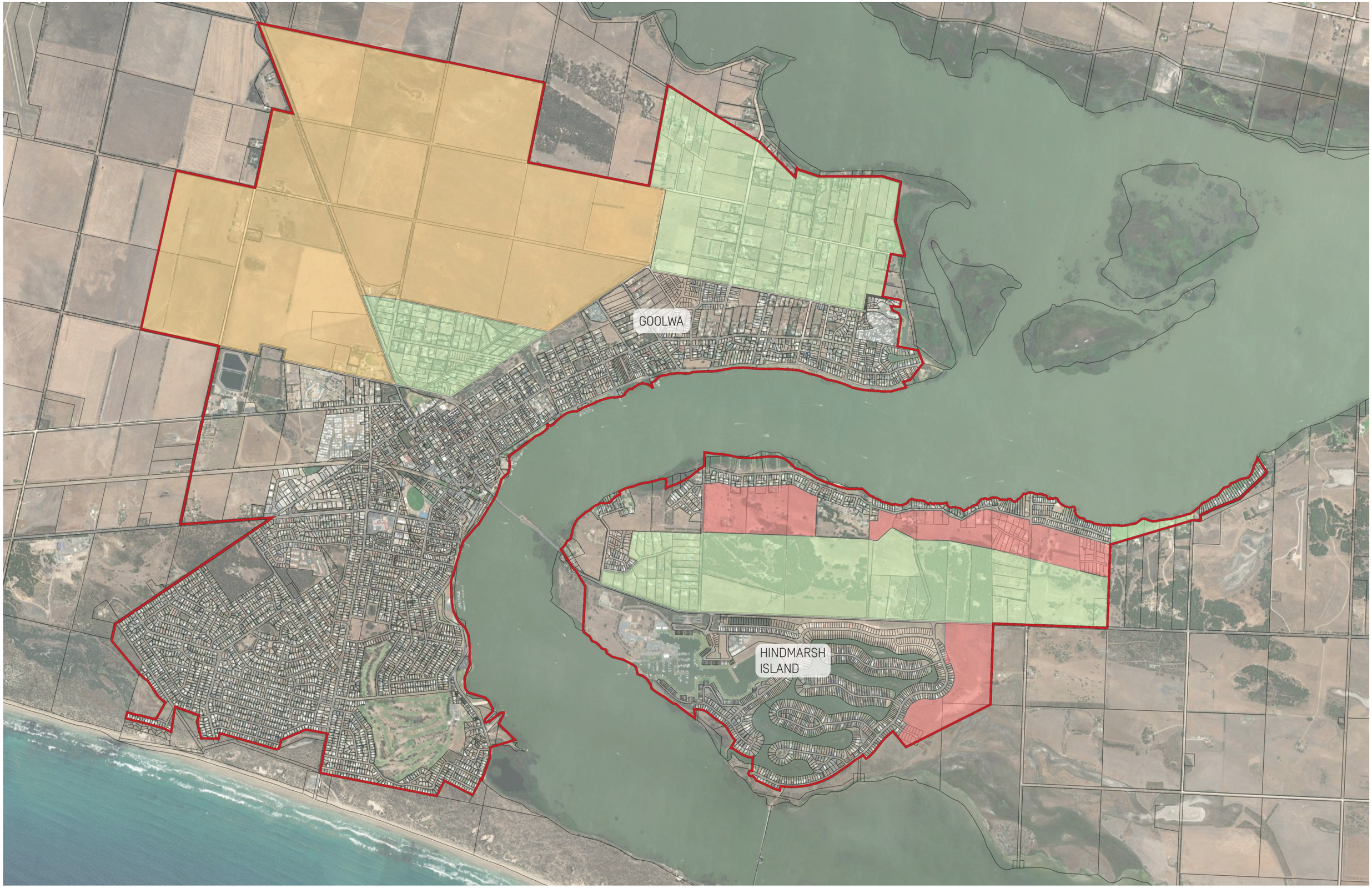
Unzoned

Rural Living

Plan Production: 21/04/2023

Scale: 1:20,000 at A3

N



Future Urban Growth Areas

Goolwa & Hindmarsh Island

LEGEND

Planned Urban Lands to 2045 (Urban Boundary)

Zoned

Unzoned

Rural Living

Plan Production: 21/04/2023

Scale: 1:25,000 at A3

N

