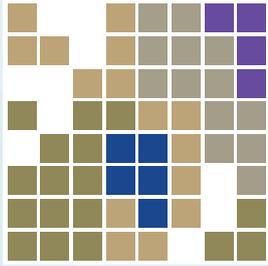




Department of **Planning,
Lands and Heritage**



Urban Growth Monitor

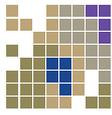
Perth Metropolitan, Peel and Greater Bunbury Regions

Executive Summary

15

January 2024





The Department of Planning, Lands and Heritage acknowledges the traditional owners and custodians of land and waterways across Western Australia. The Department is committed to reconciliation to improve outcomes for Aboriginal and Torres Strait Islander peoples and to work together to provide a culturally-safe and inclusive environment.

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Executive summary

This is the 15th edition of the *Urban Growth Monitor*, presenting information relating to land zoned for urban development calculated as at 31 December 2022.

The *Urban Growth Monitor* is prepared on behalf of the Western Australian Planning Commission (WAPC) to fulfil the requirements for tracking and modelling land supply as outlined in the Planning and Development Act 2005. It is a component of the Department of Planning, Lands and Heritage's Urban Development Program, reporting on land demand factors and supply pipeline, subdivision, housing activity and infrastructure.

The analysis presented in this report may not precisely reflect the dynamics of urban growth at the time of publishing as the *Urban Growth Monitor* relies on a range of data sources, some of which are lagging data indicators. Methodologies will continue to improve as new data and technologies become available.

The land supply analysis within the *Urban Growth Monitor* represents a broad assessment of land zoned for urban development. Information presented in this report is intended to assist but not substitute the more detailed site-specific assessments required at the district and local planning level in determining the availability of urban land for residential or other urban purposes.

The term 'land supply' can be used in a variety of contexts with different meanings and implications. As the focus of the *Urban Growth Monitor* is on land zoned for urban development, 'land supply' in this context refers to the amount of undeveloped land zoned for urban purposes in a region scheme. Urban land encompasses a range of land uses including residential, commercial, light industrial and public purposes.

Residential land buyers, on the other hand, often use the term 'land supply' in reference to the number of developed and serviced lots available to purchase for the purpose of dwelling construction. In the *Urban Growth Monitor*, this is referred to as 'lot supply' and an undersupply is termed a 'lot shortage'.

Maintaining suitable stocks of land for urban development requires an understanding of the existing stocks of zoned land and of the rate at which urban land is consumed by development. The analysis of land consumption in the *Urban Growth Monitor* uses gross consumption rates obtained over a 20-year period. Gross land consumption refers to the total area of land consumed for urban development, inclusive of both residential and non-residential uses. In the context of the *Urban Growth Monitor*, gross consumption rates are considered the most appropriate as it provides a more accurate indication of the volume of land consumed by urban development.

In addition to the analysis of land zoned for urban development, the *Urban Growth Monitor* provides information on:

- consumption rates of urban zoned land (also assessed as a gross measure);
- residential dwelling density; and
- the rate of residential infill development in the Perth metropolitan and Peel regions.

Key findings

The tiered land supply assessment model used in the *Urban Growth Monitor* provides a detailed analysis of the stock of land zoned urban or urban deferred within the Metropolitan, Peel and Greater Bunbury region schemes. Within the Metropolitan Region Scheme (MRS), there was a net reduction of 10 hectares of urban zoned land during 2022, as various public-school sites across the metropolitan region being transferred from the urban zone to the public purpose zones. Meanwhile, there were no changes in the stock of urban and urban deferred zoned land in the Peel and Greater Bunbury region schemes.

Based on historical development patterns, it would take approximately 27 years to consume the stock of non-urbanised land available for development. These estimates are based on the stock of land zoned for urban development as at 31 December 2022. Temporal supply estimates use gross consumption rates, which considers both residential and non-residential requirements such as schools, roads, reserves and commercial projects.

The consumption rates assumed in this scenario are based on the 20-year average rate of land consumption across Perth and Peel. The theoretical land supply may therefore be extended if rates of residential infill development and greenfield densities continue to improve.

Over time there will be further additions to the stock of urban and urban deferred land. The *Urban Growth Monitor* will continue to track urban land supply and consumption to ensure that stocks of land for urban development are maintained into the future. Methodologies will continue to improve as new data and technologies become available.

Achieving the objectives described in *Perth and Peel@3.5million* will require increasing the level of infill in existing urban areas and promoting greater dwelling density in greenfield developments. The average dwelling density of new development in greenfield areas in the Perth metropolitan and Peel regions was 23.5 dwellings per net site hectare for dwellings constructed in 2022. This represents a significant increase, from approximately 15 dwellings per net site hectare in 2010 but remains slightly below the long-term strategic target of 26 dwellings per net site hectare.

The net infill rate, which accounts for demolition activity, for the Perth metropolitan and Peel regions was approximately 31 per cent in 2022, up from 29 per cent in 2021. The net infill rate has fluctuated between 28 per cent and 44 per cent since monitoring began in 2011. The actual proportion of new dwelling creation that occurs in infill areas is expected to vary from year to year. Fluctuations can be attributed to factors such as dwelling demolitions, the number of background and major infill projects completed in the reporting year and the impact of major greenfield land releases. Future infill rates will indicate if the Covid-19 pandemic may also have contributed.

The following points represent the key findings for each aspect of land supply reported in the *Urban Growth Monitor*.

Land zoned for urban development

- At the end of 2022, there was approximately 117,140 hectares of urban and urban deferred zoned land in the Perth metropolitan, Peel and Greater Bunbury regions.
- In addition, there was 350 hectares of land intended for urban development within DevelopmentWA areas that is not zoned urban or urban deferred. and is included in the tiered land supply assessment.
- During 2022, there was a 10-hectare net reduction in land zoned for urban development under the Metropolitan Region Scheme.
- There was no changes in the stock of urban and urban deferred zoned land within the Peel Region Scheme and the Greater Bunbury Region Scheme.
- Around 77 per cent (90,010 hectares) of land identified for urban development is developed with urban uses and 23 per cent (27,470 hectares) is non-urbanised (undeveloped).

Land consumption

- In 2022, 590 hectares of land within the Perth metropolitan, Peel and Greater Bunbury regions were consumed by subdivision, while 520 hectares were consumed by dwelling construction.
- In the 20-year period to December 2022, an average of 860 hectares of land per annum were consumed by subdivision, and 830 hectares per annum was consumed by construction in the Perth metropolitan and Peel regions.
- In the Greater Bunbury region, an average of 60 hectares per annum was consumed by both subdivision and by construction in the 20 years to 2022.
- If land consumption continues at a rate consistent with the 20-year average, it would theoretically take an estimated 27 years to deplete existing stocks of non-urbanised land available for urban development in the Perth metropolitan and Peel regions.
- Based on the Greater Bunbury region's historical consumption rate, existing stocks of non-urbanised land could theoretically meet demand for the next 59 years.

Infill

- In the context of the *Urban Growth Monitor*, infill refers to the construction of new residential dwellings in urbanised areas that meet specific density criteria defined as part of the infill model.

In 2022, in the Perth metropolitan and Peel regions:

- A total of 9,620 dwellings were constructed. Of these, 3,740 dwellings were constructed in infill areas, and 5,880 in greenfield areas.
- Net infill refers to dwellings constructed within infill areas minus the number of dwellings removed from the existing stock through demolition.
- In 2022, net infill totalled 2,600 dwellings.
- Of the 2,600 net infill dwellings, 1,720 were in the Central sub-region and 880 in the outer metropolitan sub-regions and Peel.
- The net infill rate was approximately 31 per cent in 2022, up from 29 per cent in 2021.
- Large scale infill projects yielding over 50 dwellings per lot comprised around one in 10 of all infill development in 2022. This contrasts with 2019, when these high-density infill projects accounted for over a quarter of all infill development.

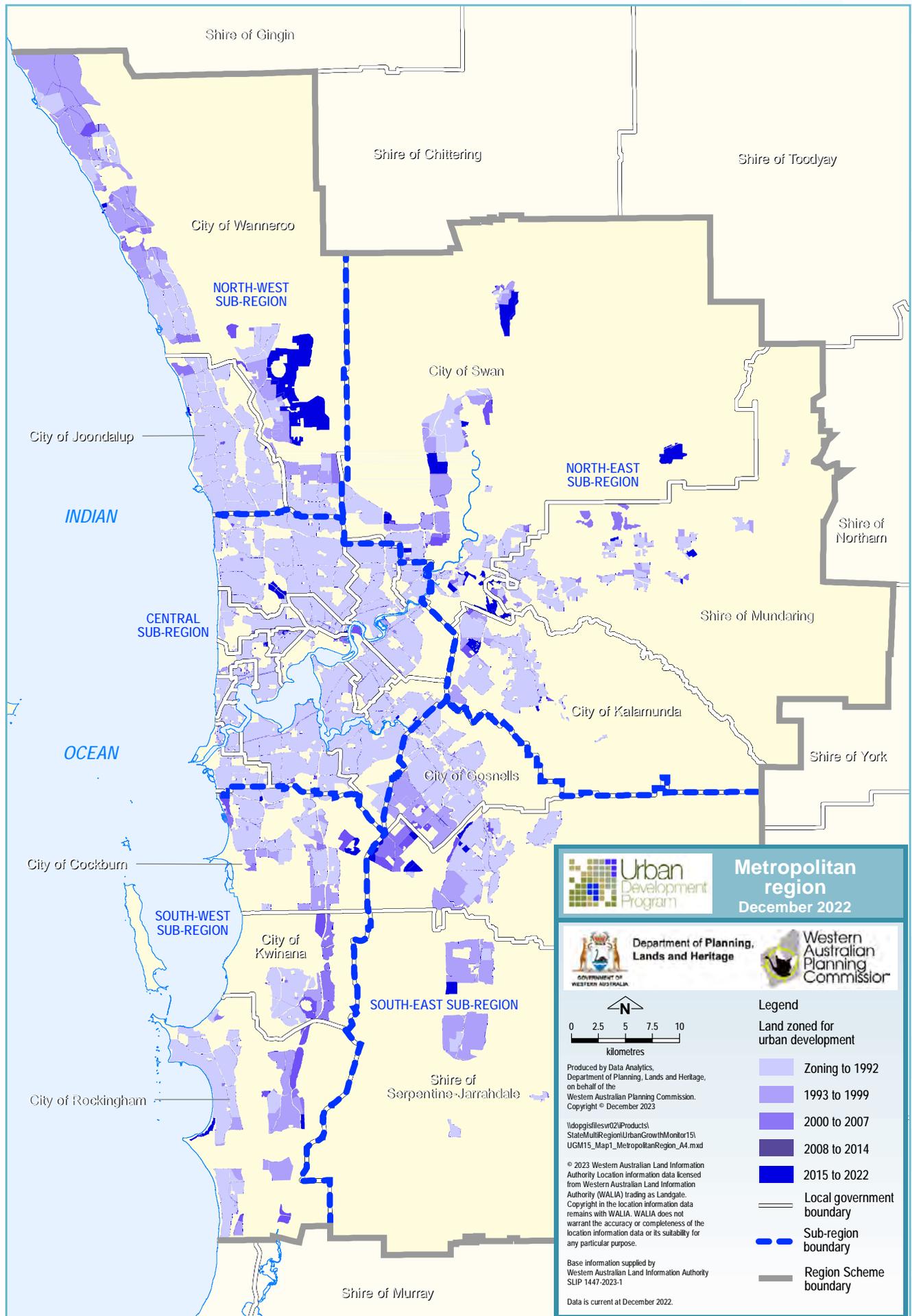
Dwelling density

- *Perth and Peel@3.5million* sets a target of 15 dwellings per gross urban zoned hectare for new residential development, which is equivalent to 26 dwellings per net site hectare.
- The gross dwelling density measure is converted to an equivalent 'net site dwelling density' target to enable the density of only new residential development to be measured.
- The 'net site dwelling density by build year' is a measure of the average number of dwellings per net site hectare, based only on lots with dwellings constructed within each calendar year.

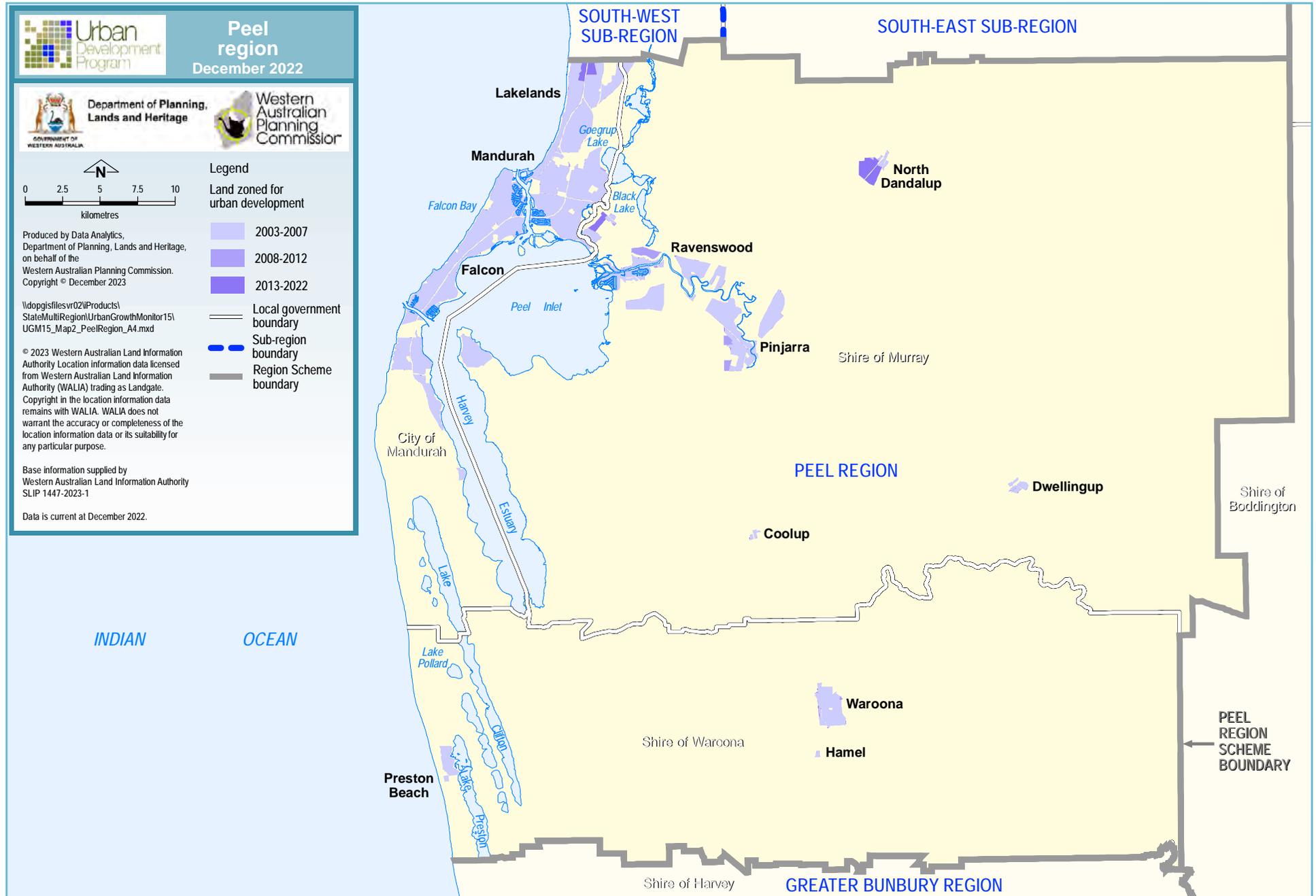
In 2021:

- The 'net site dwelling density by build year' for greenfield development areas in the outer Perth metropolitan sub-regions and Peel was 23.5 dwellings per net site hectare. This represents a significant increase, from approximately 15 dwellings per net site hectare in 2010 but remains slightly below the long-term strategic target of 26 dwellings per net site hectare.
- The 'net site dwelling density by build year' for all sites (including infill areas) in the Perth metropolitan and Peel regions was 26.6 dwellings per net site hectare.

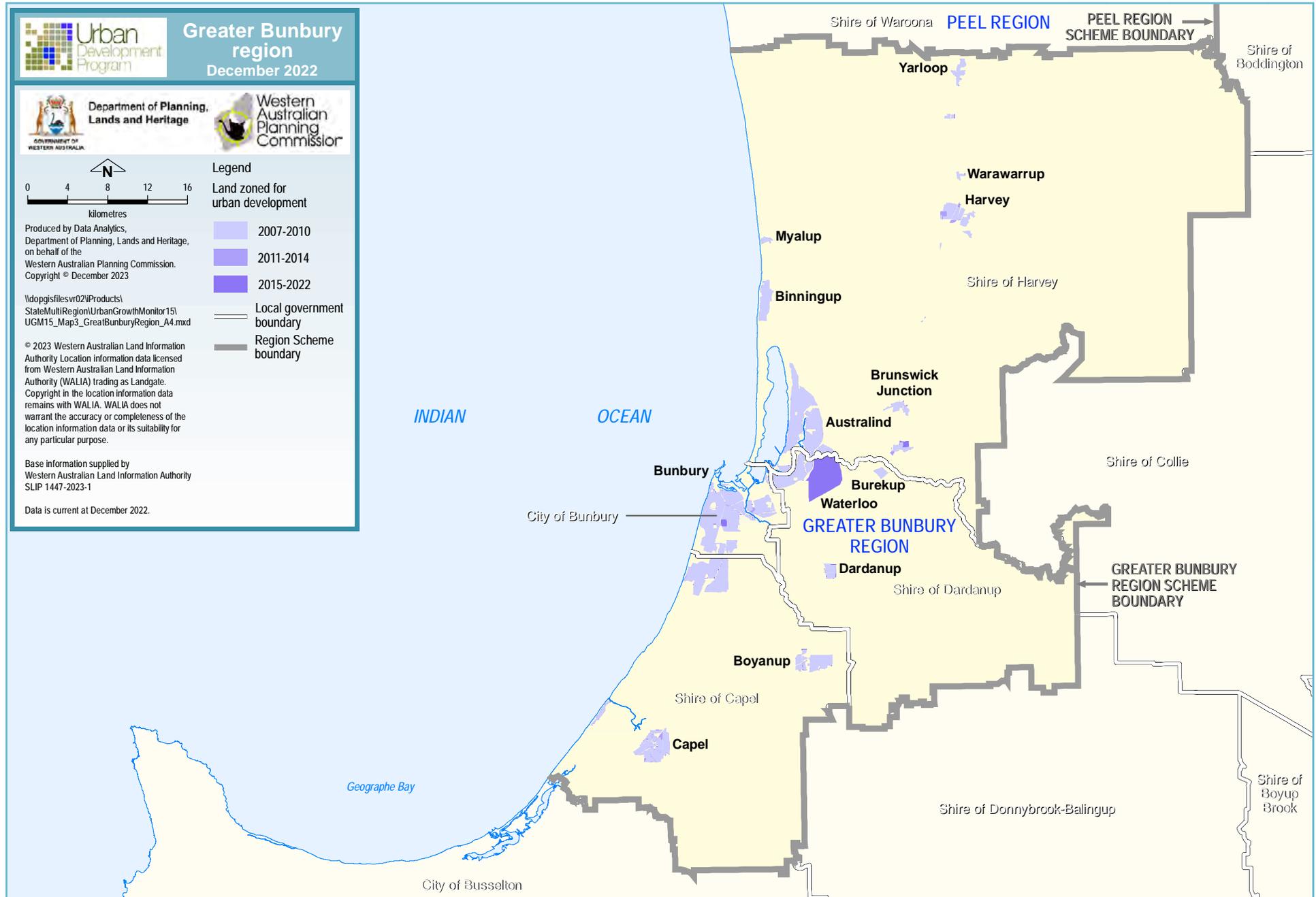
Map 1: Change in stock of land zoned for urban development over time



Map 2: Change in stock of land zoned for urban development over time – Peel region



Map 3: Change in stock of land zoned for urban development over time – Greater Bunbury region



Section 2 Tiered land supply assessment: key findings

	2.2 Tier one	2.3 Tier one	2.4.1 Tier one	2.4.2 Tier one	2.5 Tier one																																																																																																																																		
	Land zoned for urban development	Development status of land zoned for urban development	Land use dynamics incorporating local planning scheme zones (urbanised area)	Land use dynamics incorporating local planning scheme zones (non-urbanised area)	Spatial distribution of current residential conditional subdivision approvals																																																																																																																																		
Definition	Tier one evaluates the stock of land zoned urban and urban deferred in the Metropolitan, Peel and Greater Bunbury region schemes as well as land designated for urban development in redevelopment authority areas that is not zoned urban or urban deferred in the region schemes.	Tier two evaluates the stock of land zoned for urban development categorised into urbanised areas (lots subdivided to a scale consistent with the urban form) or non-urbanised areas.	Tier three examines the impact that local planning schemes have on land availability and introduces the concept of committed uses (land that is unlikely to be available for residential development).	Tier three examines the impact that local planning schemes have on land availability and identifies stocks of land potentially available for future development.	Those conditional approvals that are still valid but have not yet been issued with final approval.																																																																																																																																		
Commentary	In 2022: Perth metro – Urban zoned land ▼ by 30 hectares. Urban deferred zoned land ▲ by 120 hectares. Peel – No change in the stocks of urban and urban deferred zoned land. Greater Bunbury – No change in the stocks of urban and urban deferred zoned land.	There is approximately 27,470 hectares of non-urbanised land zoned for urban development across the Perth, Peel and Greater Bunbury regions in 2022. Perth metro – 79 per cent of urban and urban deferred zoned land in the Perth metropolitan region is urbanised. Peel – 71 per cent of the land zoned for urban development in the region is urbanised. Greater Bunbury – 63 per cent of the land zoned for urban development is urbanised.	Perth metro – Residential development as a share of the urbanised area comprise 54 per cent in the Perth metropolitan region. Peel – The share of residential development in the Peel region is slightly lower at 52 per cent. Greater Bunbury – Planned very low-density residential development comprises 17 per cent in the Greater Bunbury region.	In 2022 the stock of undeveloped urban, urban deferred and redevelopment authority land comprises approximately 57 per cent of the non-urbanised area. Perth metro – the largest stock of undeveloped urban and urban deferred land is in the North-West (5,860 hectares) sub-region. Peel – undeveloped urban and urban deferred zoned land accounts for around 80 per cent of the non-urbanised area. Greater Bunbury – undeveloped urban and urban deferred zoned land accounts for around 60 per cent of the non-urbanised area.	Approximately 63 per cent of current conditional approvals for subdivision apply to development in non-urbanised areas. Perth metro – the South-West sub-region has the largest stock of lots with current conditional approvals. Peel – around 87 per cent of lots with current conditional approvals are in non-urbanised areas. Greater Bunbury – around 71 per cent of lots with current conditional approvals are within the non-urbanised area.																																																																																																																																		
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Section 3 Land consumption rates: key findings

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	Land consumption trends over time	Land consumption by sub-region (through subdivision)	Temporal supply - Perth and Peel	Temporal land supply by sub-region																																																																					
Definition	<p>Land consumption by subdivision examines where and when subdivision occurs.</p> <p>Land consumption by built form examines when and where land is consumed through construction of new buildings.</p> <p>Both methodologies assess the gross area consumed by urban development, including non-residential requirements such as schools and roads.</p>	<p>Land consumption by subdivision examines where and when subdivision occurs.</p>	<p>Based on the stock of non-urbanised land available for urban development as at 31 December 2022, temporal supply estimates are calculated under different development scenarios. These estimates are theoretical only</p>	<p>Temporal land supply is calculated based on the average rate of land consumption for each sub-region since 2003.</p>																																																																					
Commentary	<p>Land consumption rates are cyclical and are affected by a variety of demographic, economic and regulatory factors.</p> <p>Land consumption through subdivision has averaged 860 hectares per annum from 2003 to 2022 across the three region schemes.</p> <p>Land consumption by constructed dwellings averaged 830 hectares per annum over the same period.</p>	<p>Perth metro – For 2022, all metropolitan sub-consumed land by subdivision below the long-term average volume.</p> <p>Peel – In 2022, land consumption by subdivision was below the 20-year average.</p> <p>Greater Bunbury – land consumption by subdivision for 2022 in the Greater Bunbury region was half the long-term average.</p>	<p>If all land zoned for urban development in the MRS and PRS as at 31 December 2022 were available when required, temporal land supply would theoretically last approximately 27 years based on historical consumption rates.</p> <p>The theoretical land supply may therefore be extended if rates of residential infill development and greenfield densities improve in the future.</p>	<p>Perth metro – Future growth in the Central sub-region will primarily be facilitated through infill development rather than non-urbanised land stocks and as such is not included in the sub-regional temporal supply estimates. The outer sub-regions of Perth have between 13 and 42 years of supply.</p> <p>Peel – based on average consumption rates, temporal land supply could theoretically last 30 years.</p> <p>Greater Bunbury – based on average consumption rates, temporal land supply could theoretically last 58 years.</p>																																																																					
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Section 4 Infill (Perth and Peel): key findings

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Definition	<p>Infill refers to the construction of new residential dwellings in urbanised areas.</p> <p>Infill development can occur through 'background' infill or major infill projects. Background infill refers to small projects yielding fewer than five dwellings.</p> <p>Measuring the loss of dwellings through demolitions allows the calculation of net infill, which provides a much truer indication of additions to the dwelling stock than gross infill.</p>	<p>Infill refers to the construction of new residential dwellings in urbanised areas.</p> <p>Infill development can occur through 'background' infill or major infill projects.</p> <p>Gross infill refers to the number of dwellings constructed within infill areas regardless of the number of dwellings removed from the dwelling stock through demolition activity.</p>	<p>Infill refers to the construction of new residential dwellings in urbanised areas.</p> <p>Infill development can occur through 'background' infill or major infill projects.</p> <p>Net infill refers to the number of dwellings constructed within infill areas minus the number of dwellings removed from the existing stock (assuming all demolitions are within infill areas).</p>	<p>Infill dwelling targets to 2031 and to 2050 are identified for Perth and Peel in the <i>Perth and Peel@3.5million</i> suite of documents.</p> <p><i>Perth and Peel@3.5million</i> sets an overall long term target of 47 per cent of all residential development in the Perth and Peel regions as infill.</p>	<p>Monitoring the patterns in infill development provides information on the dynamics of infill such as the breakdown of infill dwellings per lot and the infill dwelling yield by lot size.</p>																																																																																																																																																																					
Commentary	<p>Demolition activity is much higher in the Central sub-region due to:</p> <ul style="list-style-type: none"> larger stocks of older dwellings than other sub-regions; high land values and development pressure; less land available for subdivision; and a greater number of dwellings on lots with subdivision potential. <p>The 10-year average demolition rate across the Perth and Peel regions is roughly 14 per cent with annual figures ranging from eight to 18 per cent.</p>	<p>9,620 dwellings were constructed in 2022 within both infill and greenfield areas in Perth and Peel. This is a 6 per cent decrease from the total number of dwellings constructed in 2021.</p> <p>Of the 9,620 dwellings, approximately 3,740 were constructed in infill areas and 5,880 constructed in greenfield areas.</p>	<p>Net infill dwellings (gross infill minus demolitions) totalled 2,600 in 2022.</p> <p>Approximately, 70 per cent of the 2,600 net infill dwellings were in the Central sub-region and 30 per cent were in the outer sub-regions of Perth and the Peel region.</p>	<p>Infill development is unlikely to progress in a linear fashion. In addition to yearly fluctuations, it is anticipated that major infill projects will take time to progress through the planning and development pipeline.</p> <p>Between 2011 and 2022, approximately 59,220 net infill dwellings were constructed in Perth and Peel.</p>	<p>In 2022, infill projects yielding more than 50 dwellings per lot were in the Central sub-region. There is a broad correlation between the number of infill dwellings constructed and lot size.</p> <p>For larger scale projects, the ratio between the number of infill dwellings and lot size can be highly variable, depending on the specific dynamics of each project and year of completion.</p>																																																																																																																																																																					
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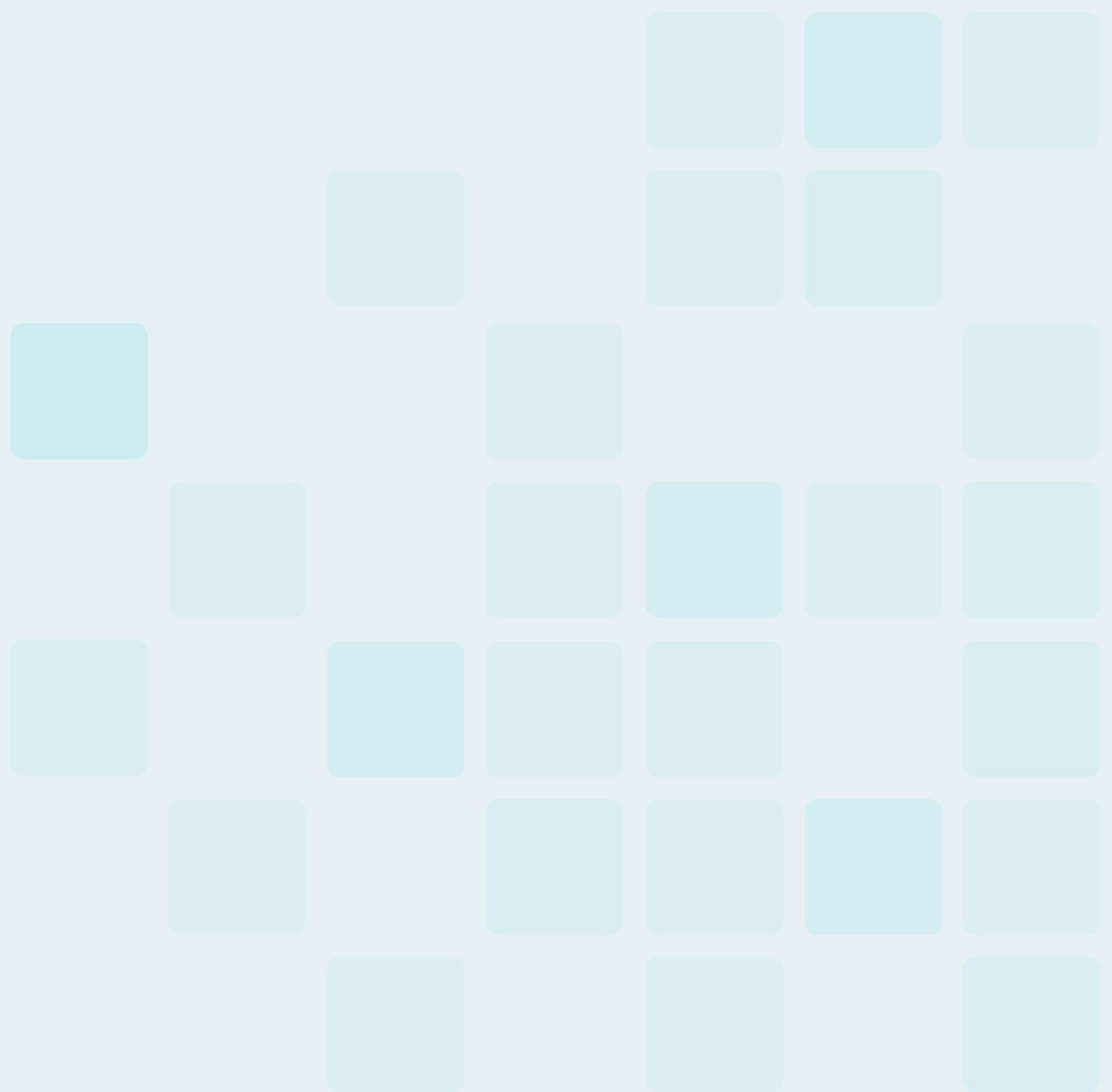
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Section 5 Density: key findings

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	Gross zone dwelling density	Net site dwelling density (urban and city centre zoned land)	Net site dwelling density by build year (urban and urban deferred zones)	Net site dwelling density by build year (greenfield)																																																																																																																																																				
Definition	Gross zone dwelling density refers to the number of dwellings per gross hectare of urbanised land only. This measure includes non-residential uses such as local roads, parks and schools and is based on urban zoned land only.	Net site dwelling density refers to the number of dwellings per net site hectare. It is based only on lots developed with dwellings regardless of when the dwellings were constructed. This provides a snapshot of net site dwelling density as at the reporting period .	Net site dwelling density by build year refers to the number of dwellings per net site hectare based only on lots developed with dwellings within the stated calendar year .	Net site dwelling density by build year refers to the number of dwellings per net site hectare based only on lots in greenfield areas developed with dwellings within the stated calendar year . Net site dwelling density by build year (greenfield) is the most appropriate measure to assess development trends against strategic objectives.																																																																																																																																																				
Commentary	Gross zone dwelling density relates to the total urbanised area within the urban zone and is less sensitive than other measures to changes in the dwelling stock. It provides an indication of the broad conversion of urban zoned land into dwellings , with incremental changes observable over time. Gross zone dwelling density has been slowly increasing over time in the Perth metropolitan area while it has remained steady in the Peel region and in the Greater Bunbury region.	Dwellings per net site hectare uses data from Landgate and the Department of Planning, Lands and Heritage's region scheme zoning information. Net site dwelling density based on the urban and city centre zones : Perth metro – ▲ from 15.6 dwellings to 16.5 dwellings per net site hectare from 2015 to 2022. Peel – ▲ from 12.8 dwellings to 13.4 dwellings per net site hectare from 2015 to 2022. Greater Bunbury – ▲ from 9.1 dwellings to 9.4 dwellings per net site hectare from 2015 to 2022.	The gross dwelling density target is challenging to measure as new residential development may not be easily separated from the entire urbanised extent based on location alone. The inclusion of the year of dwelling construction at a net site density scale allows for temporal changes in dwelling density to be more clearly observed. Net site dwelling density by build year is based on the urban and city centre zones and the year of dwelling construction : In the 10 years to 2022: Perth metro – ▲ from 22.8 to 26.6 dwellings per net site hectare. Peel – ▼ slightly from 17.7 to 18.0 dwellings per net site hectare. Greater Bunbury – ▲ slightly from 11.3 dwellings to 11.6 dwellings per net site hectare.	The 15 dwellings per gross urban zoned hectare target set by <i>Perth and Peel@3.5million</i> can be expressed as an equivalent target of 26 dwellings per net site hectare . The net site dwelling density by build year (greenfield) excludes infill areas to enable a comparison of observed development trends against the strategic objectives. The net site dwelling density by build year (greenfield) for the Perth metropolitan and Peel regions was 23.5 for 2022. This represents significant progress from 2010, when targets were initially set. Annual fluctuations to the net site dwelling density by build year are to be expected, as the sample size is restricted to lots on which dwellings were constructed in the reporting year. As a result, it is important to consider the overarching density trends of residential development in relation to the strategic target.																																																																																																																																																				
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Figures may not sum due to rounding. Property valuation database, Landgate (2022) and Integrated Land Information Database, unpublished data, Department of Planning, Lands and Heritage (2023).

Note: Density figures may change depending on the date of extraction as the Landgate property valuation database is periodically updated which may affect historical dwelling counts.



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