SUBURBAN RAIL LOOP EAST

SRL East Draft Structure Plan | Burwood

Housing Needs Assessment

More Homes For Victorians

VICTORIA State Government

Suburban Rail Loop

PREPARED FOR SUBURBAN RAIL LOOP AUTHORITY

SRL EAST DRAFT STRUCTURE PLAN HOUSING NEEDS ASSESSMENT – BURWOOD

FEBRUARY 2025

REVISION 01

AJM
Joint Venture

Document Control Record

Joint Venture

222 Exhibition Street, Melbourne VIC 3000

PO Box 23061, Docklands VIC 8012 Australia

DOCUMENT CONTROL			
Project Title	**Suburban Rail Loop East**		
Document Title	**SRL East Draft Structure Plan - Housing Needs Assessment – Burwood**		
Document ID	**Technical Report J.5**		
Rev	**Date**	**Revision details/status**	**Author**
01	February 2025	For exhibition	R. Quick
Current revision	01		

Contents

Appendices

Executive summary

As part of the Suburban Rail Loop (SRL) East project, Draft Structure Plans (Structure Plans) are being prepared for the neighbourhoods surrounding the new underground stations at Cheltenham, Clayton, Monash, Glen Waverley, Burwood, and Box Hill.

The Structure Plans will provide a framework to guide growth and change in each neighbourhood, while protecting and preserving the features that people love about them now.

This report will inform the development of the Structure Plan for Burwood.

HOUSING NEEDS

Understanding future demand for housing in Burwood due to population growth is crucial for structure planning.

The report describes the existing demographics of residents and the state of the housing market in each Structure Plan Area and the surrounding area. It also identifies the future housing and dwelling needs of the projected population, including number of dwellings, type (e.g. apartment, separate houses) and size, considering case study analysis and development trends.

Recommendations to consider when developing the Structure Plan are made to ensure the right amount and type of housing is delivered in Burwood in the right locations.

FINDINGS

Current Population and Demographics

The Burwood Structure Plan Area is already supporting strong population and dwelling growth, with an estimated resident population of just over 5300 in the Structure Plan Area as of 2021.

A large proportion new dwellings constructed in the Structure Plan Area over the last decade have been in medium-density dwellings. Most of these medium-density dwellings have three or more bedrooms, influenced by the development of two-storey townhouses commonly occupied by families.

Features of the Burwood Structure Plan Area resident population in 2021 include the following:

- The Structure Plan Area is heavily influenced by the presence of Deakin University, with 1 in 5 residents undertaking tertiary education
- A large cohort of people aged between 15 and 39 years.
- Lower levels of affluence
- More group households and fewer families with children
- Most households are renting
- A large overseas-born population, particularly from China.

Future Population

The population in the Burwood Structure Plan Area is expected to increase to an estimated **11,100 people in 2041**. This growth translates to 3.8% growth per annum. An estimated 5800 additional people in the Structure Plan Area from 2021 levels will create a strong demand for new housing. Population growth is relatively small when compared with other SRL East Precincts.

Dwelling Growth

An estimated **2580 net additional dwellings** are required by 2041 to house the projected population in the Structure Plan Area, which would increase total dwellings to 4730. This translates to an annual growth rate of 130 dwellings. Accounting for projected demolitions of around 180 existing stock, a total of 2760 new dwellings are required to be built to meet projected population growth.

High-density dwellings are likely to be required to accommodate a large amount of projected growth. Within the Structure Plan high-density dwellings are projected to make up 2690 of the new dwellings projected. The most common product is projected to be two-bedroom high-density with a substantial amount of new high-density three or more-bedroom dwellings to accommodate families.

Low-density dwellings are projected to decline due to some demolitions of older stock and the need to build medium-density and high-density dwellings to accommodate population growth efficiently.

Analysis of dwelling growth in comparable areas (such as Epping NSW) suggests the projected growth is modest compared to growth achieved in comparable areas[1]. However, projected growth is substantially higher than that witnessed between 2011-2021 in the Structure Plan Area itself. An uptick in growth is expected with the increase in transportation and amenity provided by the SRL East Station, but significant change in dwelling delivery will be required.

Diverse Housing

There is projected to be 630 households eligible for social and affordable housing by 2041. Considering the current supply of 80 dwellings the gap of 550 (eligible households minus current supply) amounts to 21.3% of the total net additional dwellings required by 2041 (2580) The large gap between eligibility and supply indicates a need for greater supply of social and affordable housing in the Structure Plan Area.

With the continued growth in enrolment forecast at the Deakin Universities Burwood Campus, it is projected there will be additional demand for 1260 student accommodation beds with the Structure Plan by 2041. It is noted that choice between student accommodation and standard residential dwellings creates flexibility with regards to structure planning.

The projected need for new retirement dwellings and aged care beds is projected to be relatively minimal, with a total of 70 Independent Living Units (ILUs) and 60 Residential Aged Care (RAC) beds projected by 2041.

2100 key workers on very low to moderate incomes are projected to work within the Structure Plan Area by 2041 creating considerable demand for key worker housing.

HOUSING DEMAND BY STRUCTURE, BURWOOD STRUCTURE PLAN AREA, 2021-2041

	2021		2041		2021-2041 CHANGE	
	NO.	%	NO.	%	NO.	ANNUAL GROWTH RATE (%)
Population (no.)						
Low-density	3300	62.6%	3200	28.5%	-100	-0.2%
Medium-density	1600	30.7%	1900	17.4%	300	0.9%
High-density	400	6.7%	6000	54.1%	5600	15.2%
Total population	**33,00**	**100.0%**	**11,100**	**100.0%**	**5800**	**3.8%**
Dwellings (no.)						
Low-density	1210	56.6%	1040	21.9%	-180	-0.8%
Medium-density	730	33.9%	800	16.8%	70	0.5%
High-density	210	9.6%	2900	61.3%	2690	14.1%
Total dwellings	**2140**	**100.0%**	**4730**	**100.0%**	**2580**	**4.0%**
Floorspace (sq.m GBA)						
Low-density	383,400	72.8%	333,700	43.7%	-49,700	-0.7%
Medium-density	124,400	23.6%	133,000	17.4%	8600	0.3%
High-density	18,700	3.6%	297,500	38.9%	278,800	14.8%
Total floorspace	**526,500**	**100.0%**	**764,200**	**100.0%**	**237,700**	**1.9%**

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Dwellings and floorspace under the 2021-2041 CHANGE column refer to net dwelling change, not accounting for new dwelling required to be built because of demolitions of existing stock. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

[1] Comparable areas are chosen through a selection process detailed in section 7.

PROJECTED DWELLINGS REQUIREMENTS, BURWOOD STRUCTURE PLAN AREA, 2021–2041

	2021		2041		2021-2041 CHANGE	
	NO.	%	NO.	%	NO.	ANNUAL GROWTH RATE (%)
Low-density						
Studio / 1-bedroom	0	0.1%	0	0.0%	0	-
2-bedroom	110	5.3%	90	1.9%	-20	-1.2%
3+bedroom	1100	51.1%	940	20.0%	-160	-0.7%
Total dwellings	**1210**	**56.6%**	**1040**	**21.9%**	**-180**	**-0.8%**
Medium-density						
Studio / 1-bedroom	50	2.4%	60	1.2%	10	0.4%
2-bedroom	230	10.7%	280	5.9%	50	1.0%
3+bedroom	450	20.8%	460	9.7%	10	0.2%
Total dwellings	**730**	**33.9%**	**800**	**16.8%**	**70**	**0.5%**
High-density						
Studio / 1-bedroom	80	3.6%	730	15.4%	650	11.8%
2-bedroom	120	5.7%	1760	37.3%	1640	14.3%
3+bedroom	10	0.3%	410	8.6%	400	23.1%
Total dwellings	**210**	**9.6%**	**2900**	**61.3%**	**2690**	**14.1%**
Grand total dwellings	**2140**	**100%**	**4730**	**100%**	**2580**	**4.0%**

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. . Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

CASE STUDIES VS DRAFT BURWOOD STRUCTURE PLAN (BURWOOD STRUCTURE PLAN), DWELLING GROWTH PER ANNUM, ACTUAL & PROJECTED

CASE STUDY	ADDITIONAL DWELLINGS PER ANNUM			
	LOW-DENSITY	MEDIUM-DENSITY	HIGH-DENSITY	TOTAL
Epping (2001-2021)	0	20	180	**200**
Lidcombe (2001-2021)	40	40	100	**180**
Kelvin Grove (2001-2021)	20	20	210	**250**
Burwood Structure Plan Historic Growth (2011-2021)	-10	30	20	**40**
Burwood Structure Plan Projection (2021-2041)	**-10**	**0**	**130**	**130**

Source: ABS (2001 & 2021) STRD Dwelling Structure; AJM JV

ADDITIONAL DIVERSE HOUSING REQUIRED, BURWOOD STRUCTURE PLAN AREA, 2021–2041

	EXISTING SUPPLY	MODELLED REQUIREMENT - 2041	GAP (+UNDERSUPPLY, -OVERSUPPLY)	PROPORTION OF TOTAL ADDITIONAL DWELLINGS NEEDED
Total "in need" - affordable, social and homeless requirement	80	630	550	21.3%
Student accommodation	1350	1910	560	-
Retirement village (ILU)	90	160	70	2.7%
Residential aged care facility (RAC)	0	60	60	-

Note: Affordable and social housing supply is derived from the 2021 Census. RACs are measured in terms of beds and cannot be compared with dwellings required. Numbers rounded. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS ERP; AJM JV

RECOMMENDATIONS

The recommendations derived through this report are summarised below, and their locations are shown in the Figure at the end of this Executive Summary (ES1). The numbers on the Figure refer to the number of each recommendation below.

Housing quantum and density

1) Plan for around 2600 net new dwellings in the Burwood Structure Plan Area to accommodate an additional projected population of around 5800 people by 2041.
2) Facilitate the delivery of high-quality, predominantly high-density housing to meet the projected dwelling demand.
3) Encourage the delivery of the higher-density housing in preference to low- or medium-density forms.

Housing Diversity

4) Support delivery of amenity in the Structure Plan Area to encourage residential development and support greater diversity of housing and the population.
5) Encourage development that offers a diversity of medium and higher-density housing typologies, including larger (family-sized) apartments and affordable options.
6) Ensure adequate open space, facilities and amenity are provided on-site or in proximity to apartments to attract diverse household types.
7) Facilitate opportunities for a variety of residential types and development locations to attract a diverse range of developers and builders.
8) Encourage delivery of social and affordable housing in the Structure Plan Area. Mechanisms to feasibly secure social and affordable housing provision within private housing developments should be explored.
9) Support the delivery of other purpose-built housing types such as student accommodation and housing for elderly residents.

Housing locations

10) Facilitate high-density apartment development along the Burwood Highway and other key road corridors.
11) Plan for significant housing growth close to the Burwood SRL Station.
12) Encourage lot consolidation around the Burwood SRL Station to facilitate density increase.
13) Encourage housing types to support a diverse population across the Structure Plan Area, but particularly close to the station and Deakin University's Burwood Campus.

Other opportunities

Although potentially beyond the scope of the Structure Plan development and supporting Planning Scheme Amendments, other opportunities to support the necessary housing development in Burwood include the following:

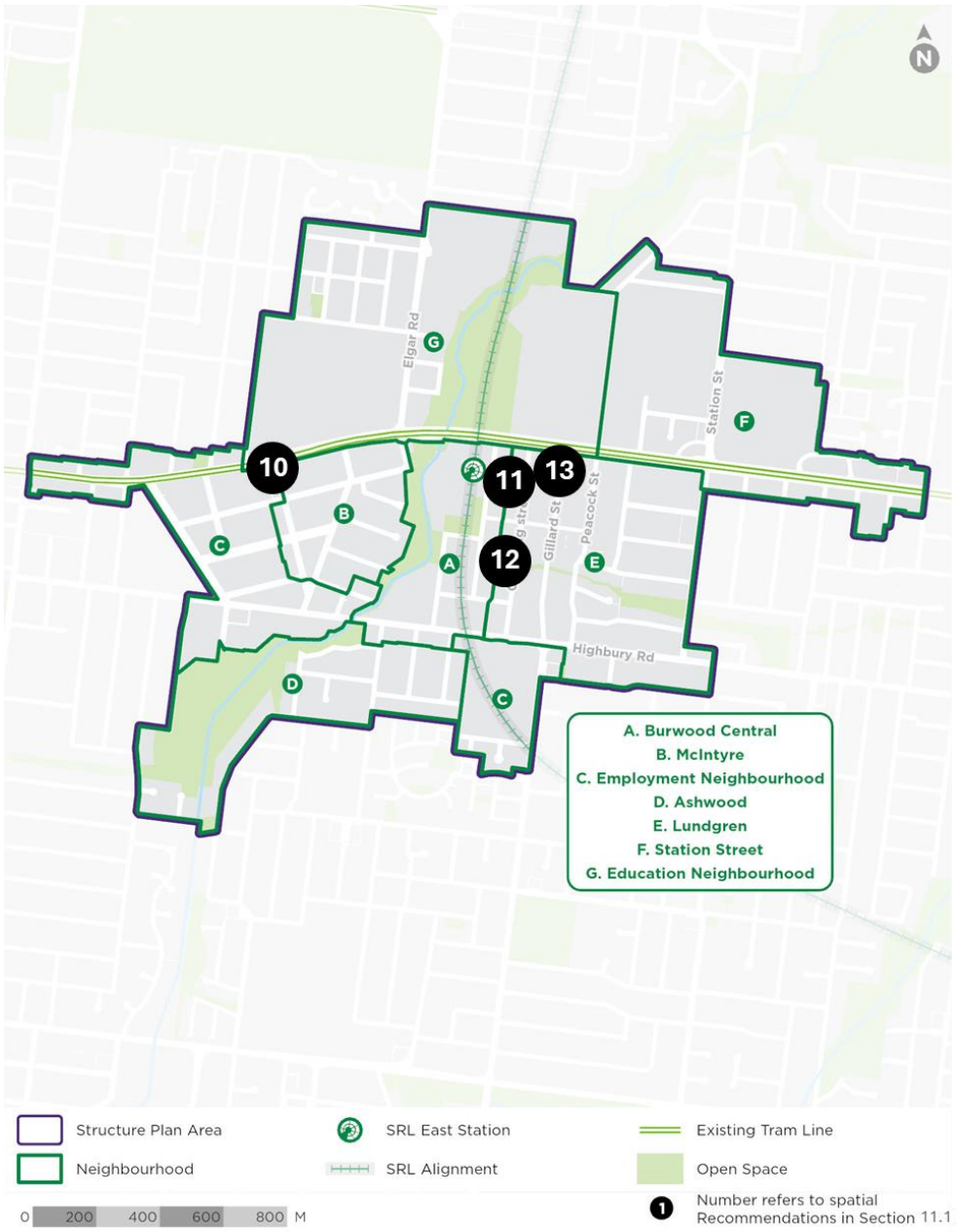
- Monitor the status of the Mount Scopus school site, as it could present an opportunity for larger scale and consolidated delivery of housing.
- Consider facilitating housing on surplus State Government land, particularly social and affordable housing in line with the Victorian Government's Housing Statement.
- Identify suitable planning provisions and processes to support the faster approval of suitable and eligible priority housing development.

10 Facilitate high-density apartment development along the Burwood Highway and other key road corridors.

11 Plan for significant housing growth close to the Burwood SRL Station.

12 Encourage lot consolidation around the Burwood SRL Station to facilitate density increase.

13 Encourage housing types to support a diverse population across the Structure Plan Area, but particularly close to the station and Deakin University's Burwood Campus.



Only location-related recommendations are outlined on the map. Where a number does not reference a specific site, it indicates a general area rather than an exact location.

ES1 HOUSING DEVELOPMENT LOCATION CONSIDERATIONS, BURWOOD STRUCTURE PLAN AREA

1. Introduction

Suburban Rail Loop (SRL) is a transformational project that will help shape Melbourne's growth in the decades ahead. It will better connect Victorians to jobs, retail, education, health services and each other – and help Melbourne evolve into a 'city of centres'.

SRL will deliver a 90-kilometre rail line linking every major train service from the Frankston Line to the Werribee Line via Melbourne Airport.

SRL East from Cheltenham to Box Hill will connect major employment, health, education and retail destinations in Melbourne's east and south east. Twin 26-kilometre tunnels will link priority growth suburbs in the municipalities of Bayside, Kingston, Monash and Whitehorse.

SRL East Structure Plan Areas will surround the six new underground stations at Cheltenham, Clayton, Monash, Glen Waverley, Burwood, and Box Hill.

1.1 Purpose of this report

This technical report will inform the development of the Draft Burwood Structure Plan (Burwood Structure Plan) and guide land use planning and development in the Structure Plan Area.

The report describes the existing demographics of residents and the state of the housing market in the Structure Plan Area and the surrounding area. It also identifies the future housing and dwelling needs of the projected population, including number of dwellings, type (e.g. apartment, separate houses) and size.

Issues and opportunities relating to housing that impact planning for the development of the Burwood Structure Plan Area are identified.

Recommendations to consider when developing the Burwood Structure Plan are made, with the objective to avoid, minimise or manage potential negative impacts of change, and to maximise potential for positive change. This includes recommendations to ensure the right amount and type of housing is developed in the right locations.

1.2 Project context

Construction of the SRL East underground stations is underway at Cheltenham, Clayton, Monash, Glen Waverley, Burwood, and Box Hill. This provides an opportunity to enhance the surrounding neighbourhoods. SRL East will support thriving and sustainable neighbourhoods and communities that offer diverse and affordable housing options, with easy access to jobs, transport networks, open space, and community facilities and services. Figure 1.1 shows SRL East in the context of the entire SRL project and Melbourne's rail network.

A Vision has been developed in consultation with the community and stakeholders for each SRL East Structure Plan Area and surrounds. The visions sets out the long-term aspirations for these areas, ensuring they are ready to meet the needs of our growing population.

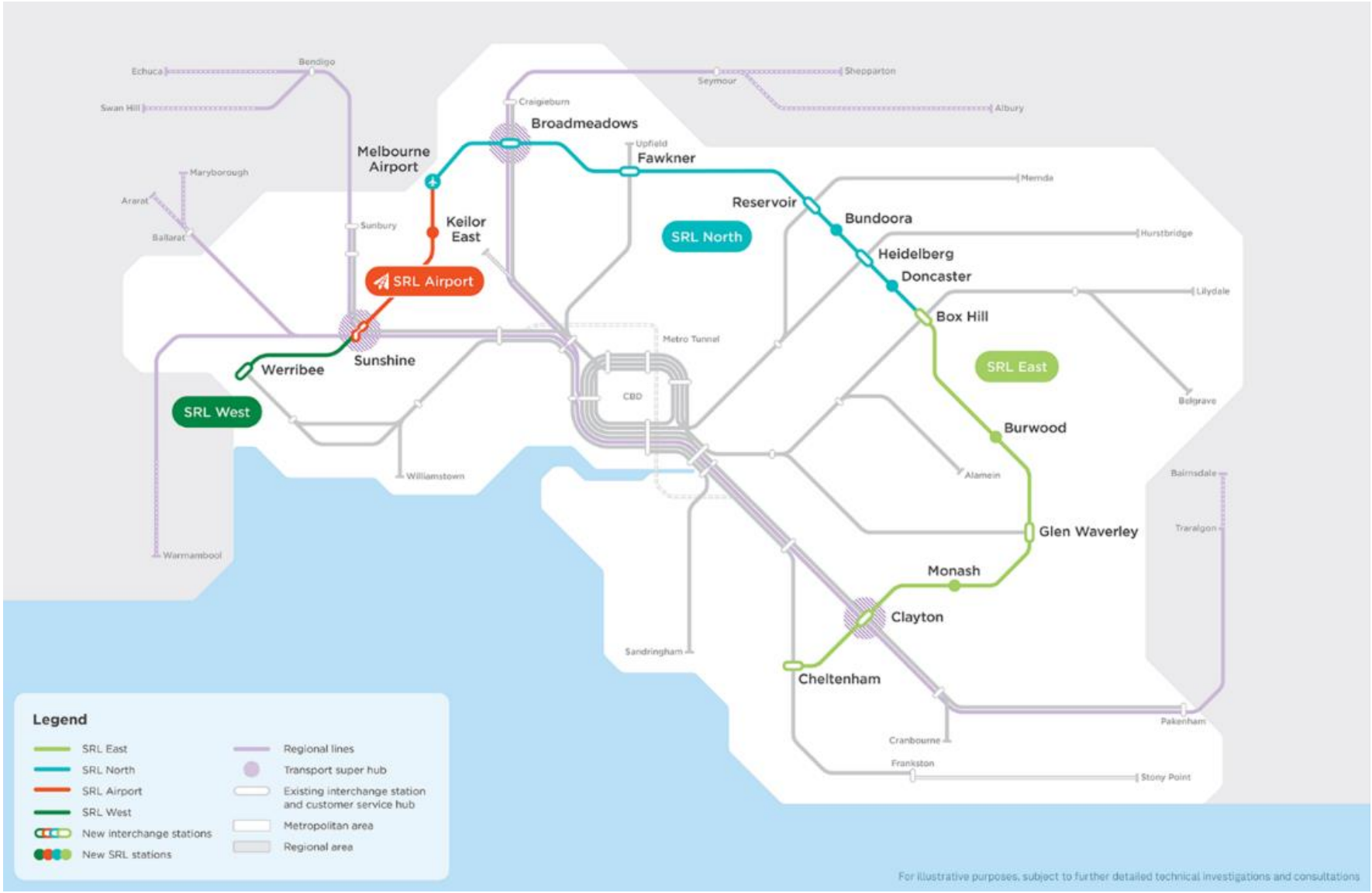


FIGURE 1.1 SUBURBAN RAIL LOOP

1.3 Structure planning for SRL East

Draft Structure Plans (Structure Plans) have been prepared for defined areas surrounding the new SRL East stations to help deliver the Vision developed for each SRL East neighbourhood.

The Structure Plans cover defined Structure Plan Areas that can support the most growth and change. These areas cover a walkable catchment that extends from the SRL station entrances. Additional places are included within each defined area as required to make planning guidance more robust and effective, and to align with each community's aspirations and current and future needs.

A Structure Plan is a blueprint to guide how an area develops and changes over a period of time. Structure Plans describe how future growth within the area will be managed in an appropriate and sustainable way to achieve social, economic and environmental objectives. The plans cover a wide range of matters, such as transport connections and car parking, housing and commercial development, community infrastructure, urban design, open space, water and energy management, climate resilience and sustainability.

By tailoring planning decisions to reflect the needs of a defined area, Structure Plans give effect to the policies and objectives set for these areas and cater for changing community needs. They also provide certainty for residents, businesses and developers by identifying the preferred locations and timing of future land uses, development and infrastructure provision.

Structure Plans take a flexible and responsive approach that enables places to evolve over time.

Planning scheme amendments will be required to implement the Structure Plans into the planning schemes of the cities of Bayside, Kingston, Monash and Whitehorse.

1.4 Structure of this report

Part A: Background

- Part A reviews Victorian and local government housing policies and strategies and considers how development in the Structure Plan Area can contribute to achieving their objectives. Trends contributing to high-density living as well as high-density development in Melbourne to date that will likely influence future housing in the Structure Plan Area are considered.

Part B: Current state

- Part B describes the existing resident characteristics and housing stock in the Structure Plan Area. Housing costs and affordability are considered as well as recent trends in housing supply, including recent and proposed developments.

Part C: Future housing need

- Part C forecasts population growth and housing demand in the Structure Plan Area including for social, affordable and key worker housing, as well as student accommodation, and aged care and retirement living.

Part D: Summary and recommendations

- Part D summarises the findings of the assessment and makes recommendations to consider when developing the Structure Plan.

1.5 Key data sources and definitions

The key data sources and definitions relevant to this assessment are outlined below. Additional abbreviations, references, data sources and definitions are provided in Appendix A.

- Future housing demand was assessed using population projections for the Structure Plan Area which were derived from the CityPlan population projections outlined in the Business and Investment Case (BIC) prepared for the Suburban Rail Loop (August 2021). The CityPlan projections used in the BIC projections account for the expected overall growth of Melbourne and the transport interventions and precinct initiatives of SRL influence the distribution of population. That is, population growth isn't solely driven by SRL, rather SRL influences the distribution of growth.
- **Total population** refers to all long-term residents of the Structure Plan Area. Long-term residents are those who have lived, or intend to live, within the Structure Plan Area for six months or longer. This means all residents are included, apart from those living in temporary forms of accommodation such as hotels, correctional institutions or hospitals. People living in student

accommodation, retirement villages and other non-standard forms of residential accommodation are included in the total population.

- **Structural private dwellings** referred to in this report are categorised into three types, consistent with Australian Bureau of Statistics (ABS) definitions[2]:
  1. **Low-density** refers to stand-alone dwellings, not connected to any other dwelling.
  2. **Medium-density** refers to attached dwellings like semi-detached houses, terraced houses, townhouses, detached units within a strata lot, and apartment buildings with one to two storeys.
  3. **High-density** refers to flats and apartment buildings with three or more storeys.
- The definitions of dwelling density were chosen to align with ABS definitions and ensure consistency in data analysis, though they may differ from those used in other technical reports.
- Note that other dwellings which include caravans and cabins, improvised dwellings (e.g. sheds, tents or humpies), houseboats and flats attached to shops were excluded for the purposes of the analysis as they comprise <1% of the total number of dwellings and are not expected to form a material part of planning for housing in the Structure Plan Area.
- Apartment buildings are divided into three categories by height: low-rise (1 to 3 storeys), mid-rise (4 to 8 storeys) and high-rise (9 or more storeys).
- **Dwelling typology** defines the type of housing based on its density structure (high, medium, low) and number of bedrooms. For example, a two-bedroom high-density dwelling.

A comprehensive compilation of abbreviations, data sources and definitions is provided in Appendix A.

1.6 Key assumptions and limitations

The following key assumptions and limitations apply to this assessment:

- The numbers presented in this report in tables are rounded to the nearest 10, 100 or 1000 depending on the size of the number. This is for ease of reading and recognising many of the figures are estimates. In some cases, summing the rounded numbers produces a different result to the rounded total. This is not an error.
- The analysis focuses on a single potential population outcome and evaluates the housing requirements necessary to achieve that specific outcome. The projected year for housing demand is 2041 as the emphasis for structure planning is 2041.
- CityPlan land use projections are based on modelling, which are always an approximation of what can be expected in the real environment. CityPlan is best at representing strategic level demands and patterns, rather than for small areas. Notwithstanding this, there will usually be differences between forecasts or projected and actual results because events and circumstances frequently do not occur as expected or predicted, and those differences may be material.
- The dwelling requirements, segmented by high/medium/low density and by number of bedrooms, are considered independently from the form of housing or ownership structures that may see those dwellings delivered (e.g. public vs private, for sale vs for rent).
- For example, the high-density housing need estimated in this report may be delivered through developers selling individual apartments to owner-occupiers or investors (Build-To-Sell), or through Build-To-Rent (BTR) arrangements. BTR is a term used to describe residential developments that are designed and built specifically for renting rather than for sale. These properties are typically owned by institutional investors and managed by professional property management companies. The concept is relatively new in Australia,

[2] ABS definitions for structural private dwellings are located on the ABS website https://www.abs.gov.au/census/guide-census-data/census-dictionary/2021/variables-topic/housing/dwelling-structure-strd

but it has been successful in other countries like the UK and the US. It is expected to be an increasingly important part of the future housing mix in Australia, subject to continuing efforts to make it a more attractive development option (e.g. tax reform). Benefits can include stability for renters, professional management and maintenance of properties, creation of vibrant and integrated mixed-use communities, and increasing the supply of housing with different financial hurdles compared to Build-To-Sell. BTR is assumed to represent a share of the dwelling growth identified in this report within the SRL East Structure Plan Areas, and that its delivery will be supported through government policy and the preparation of the Structure Plans.

- The diverse housing requirements identified in this report are also a subset of the total demand estimates. There is no additional requirement on top of the total dwelling need estimates for forms of diverse accommodation as often the choice of accommodation type is a matter of preference. For example, students can decide if they wish to live in student accommodation or standard residential apartments. Similarly, an elderly couple downsizing may choose to purchase a 1-bedroom apartment, or alternatively move to a retirement village.
- The diverse housing estimates provided are therefore based on the projected population and demographic profile in the Structure Plan Area, which for the purposes of this analysis, is a fixed estimate. For example, the share of over 65-year population seeking aged care or retirement living options, or the number of households eligible for social or affordable housing based on their income status. Workers and students working and studying in the Structure Plan Area are considered for key worker and student accommodation, respectively.

Further details regarding these assumptions and limitations are discussed throughout this report, while additional ones are outlined in Appendix B.

1.7 Interactions with other technical reports

This *SRL East Structure Plan - Housing Needs Assessment – Burwood* report informs, or is informed by other reports prepared to guide the development of SRL East Structure Plans:

- *SRL East Structure Plan - Economic Profile Technical Report – Burwood*: This report forecasts the long-term economic function of the Structure Plan Area, including employment growth and the amount and type of floorspace needed to support it. Employment uses and housing need to be delivered in an integrated way, resulting in a need to understand anticipated economic outcomes and the consequences for housing delivery.
- *SRL East Structure Plan - Retail Assessment – Burwood: This report forecasts long-term retail demand in the Structure Plan Area, and the amount and type of retail floorspace needed to meet the demand.* Retail space needs to be directed to appropriate areas to support the future population and workforce.
- *SRL East Structure Plan - Land Use Scenario and Capacity Assessment (LUSCA):* This analysis tests the capacity of the Structure Plan Areas to accommodate projected population and employment floorspace at 2041. The housing floorspace demand derived from this report is an input to LUSCA.
- *SRL East Structure Plan Community Infrastructure Needs Assessment - Burwood:* This will provide an understanding of the community infrastructure needs associated with the growth and renewal of the Structure Plan Areas to 2041, recommendations for future community infrastructure provision priorities and potential sites to accommodate the infrastructure. The scale, location and nature of housing development, informed by this report, influences the community infrastructure requirements.
- *SRL East Structure Plan – Transport Technical Report - Burwood:* Outlines how the transport network, across all modes, will support the Structure Planning process. It also includes a Precinct Parking Plan which recommends parking management tools to support the development of the Structure Plan Areas and support implementing a schedule for the Parking Overlay. The scale, location and nature of housing development, informed by this report, influences transport and parking requirements.

1.8 Structure Plan Area

1.8.1 STRUCTURE PLAN AREA DEFINITION

This assessment is based on the Burwood Structure Plan Area.

The Burwood Structure Plan Area surrounds the SRL station at Burwood. The Structure Plan Area is mainly located in the City of Whitehorse, with the southern portion south of Highbury Road extending into the City of Monash.

The Structure Plan Area is generally bounded by Uganda Street, Deakin University, Inverness Avenue, Bronte Avenue and Yarra Bing Crescent to the north, Andrews Street, Wridgway Avenue, Prospect Street and Huntingdale Road to the east, Zodiac Street, Ashwood Drive, Carmody Street and Barlyn Road to the south and Sixth Avenue, Evans Street, Warrigal Road, Parer Street and Meldan Street to the west.

Burwood Highway intersects the centre of the Structure Plan Area in an east-west alignment.

Deakin University Burwood campus is located in the Structure Plan Area.

The Structure Plan Area spans approximately 264 hectares and is shown in Figure 1.2

The Structure Plan Area is divided into a series of neighbourhoods. These neighbourhoods represent areas with similar land use mix and are referenced through the structure planning process. Neighbourhood A is referred to as the “core area” throughout this report.

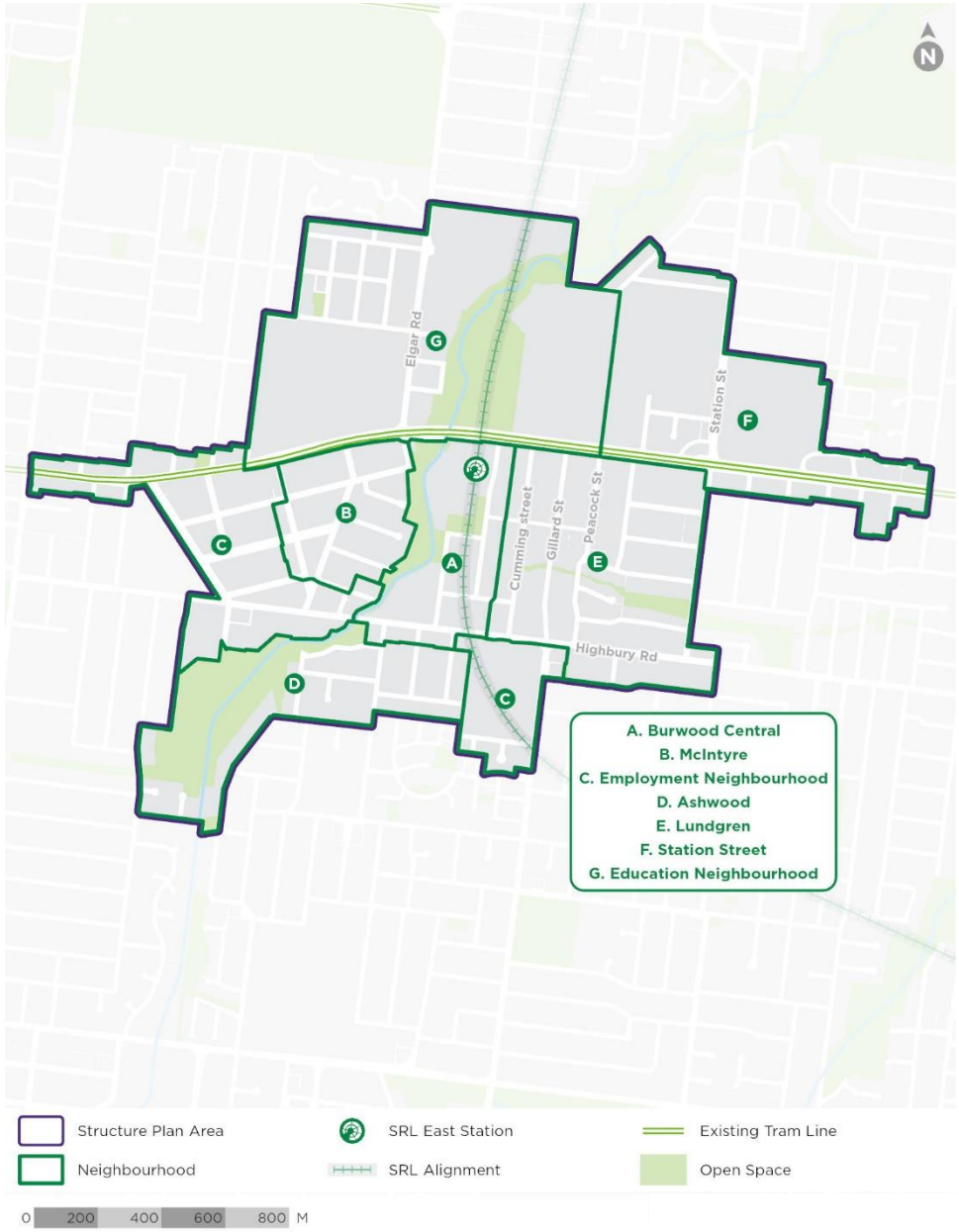


FIGURE 1.2 BURWOOD STRUCTURE PLAN AREA

1.8.2 STRUCTURE PLAN AREA POPULATION PROJECTIONS

Figure 1.2 shows the current and projected population for the Structure Plan Area.

The 2041 figure is used for assessing future housing demand in the Structure Plan Area and is derived from projections generated for the SRL Business and Investment Case (BIC). Note population growth in the area is not solely driven by SRL East.

TABLE 1.1 PROJECTED POPULATION GROWTH, BURWOOD STRUCTURE PLAN AREA, 2021–2041

	PROJECTED POPULATION (NO.)	
	2021	2041
Burwood Structure Plan Area	5300	11,100

Source: ABS ERP; Structure Plan Area population projections derived from CityPlan (published in SRL BIC)

1.8.3 BENCHMARK AREAS

For the purposes of benchmarking, data was also collected for the following areas:

- **Greater Melbourne:** as defined by the Australian Bureau of Statistics (ABS) Greater Capital City Statistical Areas boundary.
- **South East Region:** which comprises the following local government areas: Bayside, Glen Eira, Boroondara, Greater Dandenong, Kingston, Knox, Manningham, Maroondah, Monash, Whitehorse, and Stonnington.

The South East Region is shown in Figure 1.3 .

Throughout the report data is presented for the Structure Plan Area alongside data for the South East Region and Greater Melbourne for context.

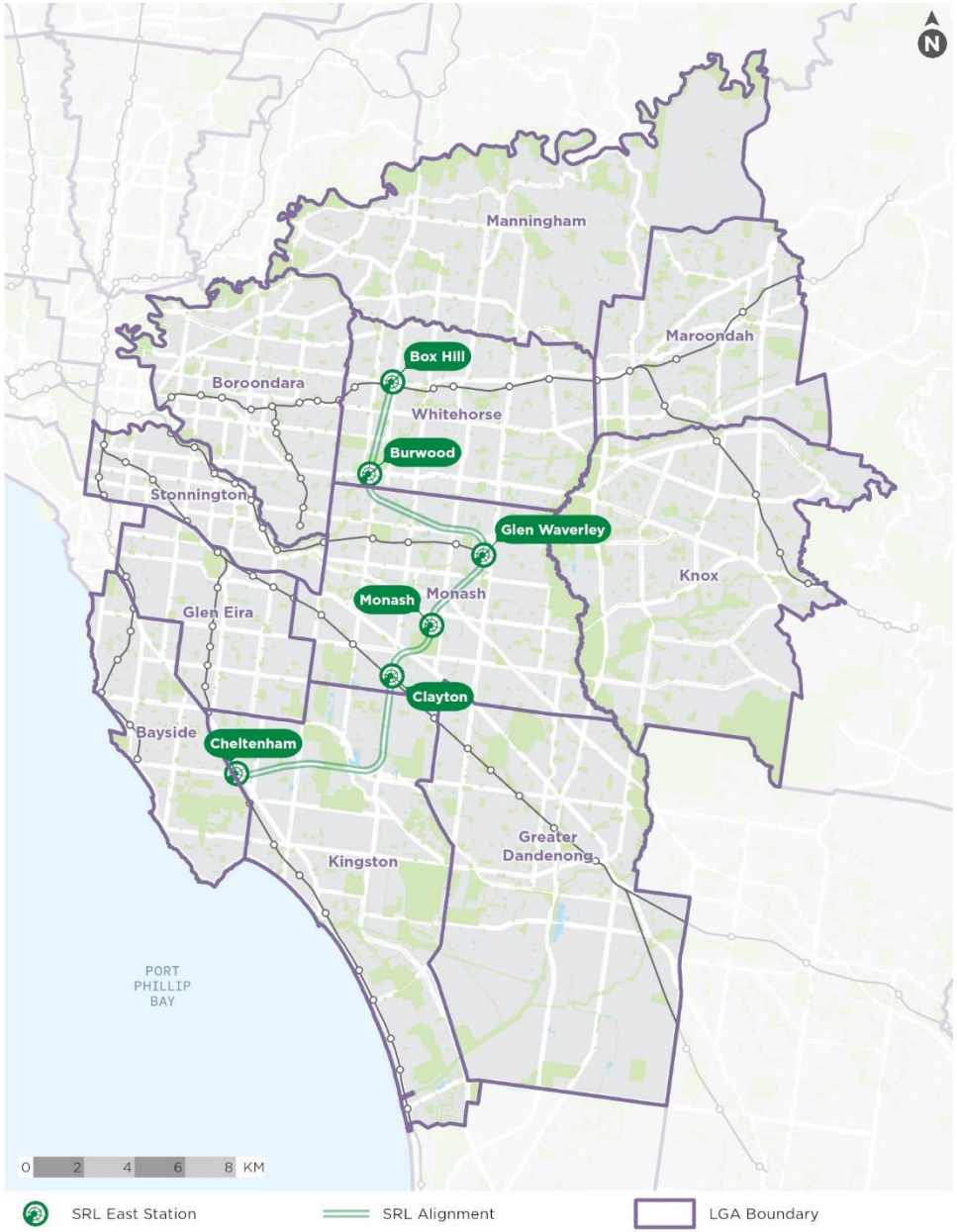


FIGURE 1.3 SOUTH EAST REGION

Part A: Background

Part A includes:

- **Section 2** reviews Victorian and local government housing policies and strategies and considers how development in the Structure Plan Area can contribute to achieving their objectives.
- **Section 3** considers trends contributing to high-density living as well as high-density development in Melbourne to date that will likely influence future housing in the Structure Plan Area.

2. Strategic context

This section summarises Victorian and local government housing policies and strategies and considers how development in the Structure Plan Area can help achieve their objectives.

2.1 Greater Melbourne population growth

Victoria is Australia's most urbanised state and Melbourne is the second-most populated city with just over 5 million residents in June 2023.

Over the decade to June 2023, Melbourne experienced strong population growth of 1.8% per annum. While the COVID-19 pandemic caused a short-term pause in population growth (annual rate of -0.2% from 2020 to 2022), over the past year from 2022 to 2023, population growth resumed with a high 3.3% per annum growth.

Figure 2.1 shows Melbourne's historical and projected population growth. Melbourne is expected to be home to 9.2 million residents by 2061. It is projected to surpass Sydney as Australia's largest capital city by around 2031–32. To accommodate this projected population growth, the city will need additional dwellings.

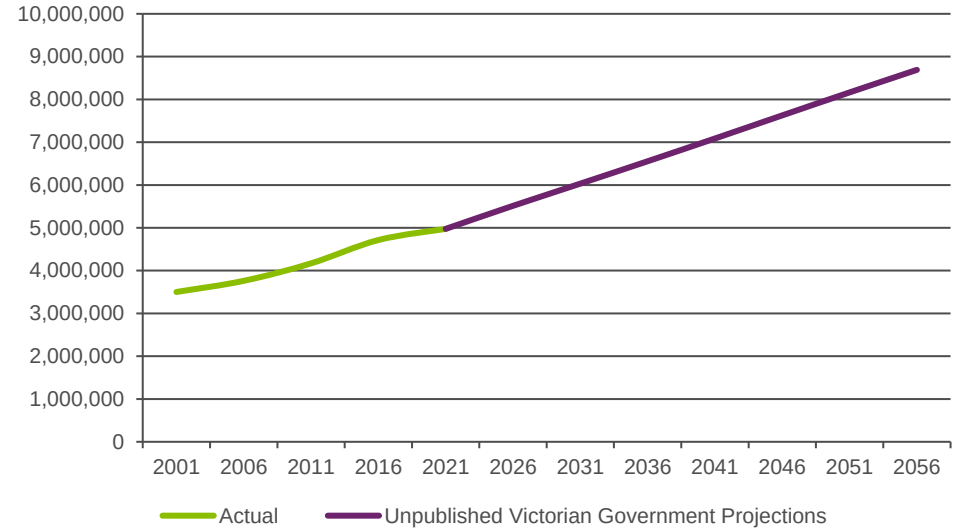


FIGURE 2.1 HISTORICAL AND PROJECTED POPULATION GROWTH, GREATER MELBOURNE, 2001-2056 (YEAR TO JUNE)

Source: ABS ERP; Unpublished Victorian Government Projections, 2023; AJM JV

2.2 Victorian Government policy

2.2.1 PLAN MELBOURNE 2017- 2050

Plan Melbourne 2017–2050 is the Victorian Government's long-term planning strategy, guiding the way the city will grow and change to 2050.

It provides an integrated land use, infrastructure and transport planning strategy to support population and jobs growth, while building on Melbourne's legacy of distinctiveness, liveability and sustainability.

Outcome 2 of Plan Melbourne is to ensure that '*Melbourne provides housing choice in locations close to jobs and services'* with the following directions also relevant:

- **Direction 2.1** – Manage the supply of new housing in the right locations to meet population growth and create a sustainable city.
- **Direction 2.2** – Deliver more housing closer to jobs and public transport.
- **Direction 2.5** – Provide greater choice and diversity of housing.

Plan Melbourne aims to facilitate an increased percentage of new housing in established areas to create a city of 20-minute neighbourhoods close to existing services, jobs and public transport. It includes an aspirational scenario for 70% of new homes to be built in Melbourne's established suburbs by 2051, compared with 30% in greenfield areas. Plan Melbourne states that this approach will support greater housing diversity and offer better access to services and jobs.

Plan Melbourne recognises that to support increased housing supply in established areas, it will be necessary to define locations best able to support increased densities.

In middle suburbs, ideal locations for more medium- and higher-density development are identified as those near employment and transport such as:

> *…urban renewal precincts; areas identified for residential growth; areas identified for greyfield renewal; areas designated as national employment and innovation clusters; metropolitan activity centres and major activity centres; neighbourhood activity centres—especially if they have good public transport connections; areas near existing and proposed railway stations that can support transit-oriented development.*[3]

Deakin University in Burwood is designated an Education Precinct. Plan Melbourne seeks to reinforce the economic functions of these precincts and states that "*they should provide opportunity for ancillary health and education services, retail, commercial and accommodation uses"*. [4]

There is no existing major activity centre within the Structure Plan Area. The Burwood Village Neighbourhood Activity Centre (NAC) provides local conveniences to local students, workers and residents. The Burwood Village NAC is an area centred around the intersection of Toorak Road, the Burwood Highway and Warrigal Road. The larger Burwood Heights Major Activity Centre sits east of the Structure Plan Area near Middleborough Road.

Plan Melbourne recognises that to achieve medium and higher-density living '*the standards of higher-density housing need to be raised'.*[5]

Plan Melbourne aims to provide more diverse housing and increase the supply of social and affordable housing:

> *For Melbourne to remain liveable for all its citizens, the supply of social and affordable housing needs to be increased. A range of housing types need to be developed within suburbs across Melbourne—not just in outer areas—to improve local affordability for homeowners and renters.*[6]

The use of government land to deliver additional social housing is promoted in Plan Melbourne.

The 2019 Addendum to Plan Melbourne updates Melbourne's projected population, housing and employment growth and incorporates Stage 1 of the SRL

[3] Department of Environment Land Water and Planning (2017) Metropolitan Planning Strategy Plan Melbourne 2017-2050. https://www.planning.vic.gov.au/__data/assets/pdf_file/0025/654550/Plan_Melbourne_2017-2050_Strategy_.pdf,. p. 50

[4] DELWP, Plan Melbourne (2017) p. 15

[5] DELWP, Plan Melbourne (2017) p. 50

[6] DELWP, Plan Melbourne (2017) p. 55

(SRL East). The Addendum recognises SRL's role in connecting Melbourne's major employment, health, and innovation precincts and supporting the development of 20-minute neighbourhoods.

2.2.2 MELBOURNE'S FUTURE PLANNING FRAMEWORK

In 2021, six region-specific Draft Land Use Framework Plans were released to guide the application of Plan Melbourne at a regional level. The metropolitan region relevant to Burwood is the Eastern Metro Region. Although these Framework Plans are in draft form, they indicate policy intentions for the region.

2.2.2.1 Draft Eastern Metro Land Use Framework Plan

The Eastern Metro region comprises the municipalities of Knox, Manningham, Maroondah, Monash, Whitehorse and Yarra Ranges. The Burwood Structure Plan Area is split across the Monash and Whitehorse municipalities. As such, the metro region of most relevance to Burwood is the Eastern Metro Region.

The Eastern Metro Region has an established network of activity centres, linear corridors based along key transport routes for residential and employment growth, and urban renewal areas that will provide opportunities to increase the supply of housing.

The framework supports significant land use change and higher-density development in SRL precincts. SRL is emphasised for its potential to enhance inter-regional connectivity and create housing opportunities in proximity to the proposed stations.

SRL precincts are designated for medium- and higher-density housing development due to their proximity to future SRL stations. Housing development in SRL precincts will be supported by other uses such as commercial, retail and services and maximise their potential as transit-oriented development sites.

The framework notes the SRL station at Burwood will enable substantial uplift in jobs and housing. The framework encourages increased investment and development along key activity corridors in the region, specifically along Burwood Highway between Deakin University, Burwood Heights and Burwood East-Tally Ho major activity centres.

The framework acknowledges that a key challenge for planning for housing around public transport will be balancing the strong demand for housing with the need to provide land for employment and jobs in and around activity centres.

The framework also emphasises the need to provide housing diversity to reflect community needs, especially providing adaptable housing options for the ageing population to 'age in place', student accommodation close or well connected to university and higher education campuses and low-cost rental, supported accommodation and social housing to accommodate low-income groups.

The following strategies relate to housing outcomes in SRL precincts within the Eastern Metro Region:

- **Strategy 22** – Maximise housing development within the established areas of the Eastern Metro Region to achieve the aspirational housing distribution scenario for metropolitan Melbourne.
- **Strategy 23** – Increase the supply of medium- and higher-density housing around the Monash NEIC, in and around metropolitan and major activity centres, urban renewal areas, SRL precincts, along activity corridors, and in and around neighbourhood activity centres serviced by good public transport.
- **Strategy 25** – Support substantial housing change in locations where transport upgrades and improvements such as Suburban Rail Loop create opportunities to locate housing closer to jobs, services and infrastructure.
- **Strategy 27** – Encourage a genuine mix of dwelling types and sizes in the Eastern Metro Region particularly in the western part of the region and along SRL corridor, to accommodate the changing future needs of the region.
- **Strategy 28** – Support alternative and sustainable residential development formats such as co-housing or build-to-rent in appropriate locations, and car-free residential developments models in locations with good access to alternative transport modes.
- **Strategy 29** – Facilitate the development of housing that is adaptable and flexible to cater for changing demographics and to support 'ageing in place'.
- **Strategy 30** – Optimise the opportunities for student accommodation and key worker housing around health and/or education precincts in the Eastern Metro Region.

- **Strategy 32** – Facilitate more affordable housing across the region, particularly in locations that have good access to jobs, services and public transport.

2.2.3 VICTORIA'S HOUSING STATEMENT

In September 2023, the Victorian Government released *Victoria's Housing Statement: The Decade Ahead 2024–2034*, setting an ambitious goal for addressing Victoria's housing needs. Draft housing targets have been developed following the Housing Statement release, including housing targets for all areas of the state.

The overall target is to increase housing delivery from 54,000 homes a year to 80,000 homes a year (equivalent to 800,000 homes over the next decade), with 70% constructed in established areas and 30% in growth areas.

By 2051, the draft targets indicate the Whitehorse and Monash LGAs are to accommodate 79,000 and 72,000 new homes, respectively.

The Housing Statement aims to support a significant share of the work agreed under the National Housing Accord and National Cabinet – across areas such as planning reform, expedited approvals, social and affordable housing and renters rights. This will build on previous rental reforms and projects like the 'Big Housing Build'.

The Housing Statement focuses on five key areas to achieve these targets and other housing aspirations:

The Housing Statement focuses on five key areas to achieve these targets and other housing aspirations:

- **Good decisions, made faster** – reforming Victoria's planning system, clearing the backlog of planning permits, giving builders, buyers and renovators certainty about how long approvals will take – and a clear pathway to resolve issues quickly if those timeframes aren't met. The reforms make the Minister for Planning the decision-maker and streamline the planning process for medium and high-density residential developments, with a construction cost of over $50 million in Melbourne and delivering at least 10% affordable housing.
- **Cheaper housing, closer to where people work** – unlocking new spaces to increase supply and stop urban sprawl, building more homes closer to where people have the transport, roads, hospitals and schools they need and delivering vital, basic community infrastructure faster. The need to create more housing with the best design standards where people want to live is key to this section of the housing statement.
- **Protecting renters' rights** – closing loopholes that drive up the cost of living for renters, giving tenants more certainty over their leases, living standards and finances, and resolving tenancy disputes faster to keep them out of VCAT. It has been identified in the last five years; typical rents have gone up by 21% in Melbourne. Increasing supply is seen as the solution to increasing affordability and the measures in the housing statement facilitate an additional 70,000 rental properties over the next 10 years.
- **More social housing** – rapidly accelerating the rollout of social and affordable homes across Victoria and launching Australia's biggest urban renewal project across Melbourne's 44 high-rise social housing towers. Redevelopment of ageing high-rise towers to provide more modern, comfortable and efficient homes is suggested. The building of 769 homes through the Commonwealth Government's Social Housing Accelerator and more than 4000 social housing homes through other programs are planned.
- **A long-term housing plan** – delivering a long-term plan to guide how our state grows in the decades ahead and reviewing the *Planning and Environment Act 1987* to build a planning system that works with Victorians – not against them. This section forms the first steps in creating a plan to help deliver Victoria's share of the nation's housing accord, which nationally includes one million new well-located homes by 2029 and 10,000 affordable homes.

2.2.4 VICTORIA'S PLANNING PROVISIONS

The Victoria Planning Provisions (VPP) are the standard provisions that form the framework for all of Victoria's planning schemes.

Clause 16 of the VPP outlines a number of strategies in relation to housing.

The objectives of the Clause include:

- To facilitate well-located, integrated and diverse housing that meets community needs.
- To deliver more affordable housing closer to jobs, transport and services.

There are a series of strategies that seek to achieve these objectives, including the likes of:

- Ensure that an appropriate quantity, quality and type of housing is provided, including aged care facilities and other housing suitable for older people, supported accommodation for people with disability, rooming houses, student accommodation and social housing.
- Increase the proportion of housing in designated locations in established urban areas (including under-utilised urban land) and reduce the share of new dwellings in greenfield, fringe and dispersed development areas.
- Encourage higher density housing development on sites that are well located in relation to jobs, services and public transport.
- Facilitate diverse housing that offers choice and meets changing household needs by widening housing diversity through a mix of housing types.
- Improve housing affordability by increasing choice in housing type, tenure and cost to meet the needs of households as they move through life cycle changes and to support diverse communities.
- Increase the supply of well-located affordable housing by facilitating a mix of private, affordable and social housing in suburbs, activity centres and urban renewal precincts.
- Facilitate the delivery of social housing by identifying surplus government land suitable for housing.

2.3 Local government policy

Local government planning policies relating to housing are summarised below, noting the Burwood Structure Plan Area is in part within the City of Whitehorse, and part the City of Monash.

2.3.1 WHITEHORSE HOUSING STRATEGY

The Whitehorse Housing Strategy 2014 provides a policy framework 'to encourage and support the provision of housing in the City of Whitehorse that meets residents' needs in terms of location, diversity, sustainability, accessibility, affordability and good design'. [7]

The Strategy outlines several housing principles, including:

- Promote housing growth and diversity in locations within walking distance of public transport and local services such as shops, parks and education.
- Provide a mix of housing that meets the life stage and cultural needs of residents.
- Advocate for increases in affordable and social housing stock.[8]

2.3.2 CITY OF WHITEHORSE STUDENT ACCOMMODATION STRATEGY

The City of Whitehorse Student Accommodation Strategy proposes a Council Vision for student accommodation in Whitehorse, which is to: '*Support the continued contribution of students to a healthy, vibrant, inclusive and diverse community by providing a sustainable and accessible student housing market for Whitehorse's growing student population'*.[9]

This includes ensuring adequate supply of housing for students and ensuring housing is appropriate, safe, secure, and well located. Well located student

[7] City of Whitehorse, 2014, Whitehorse Housing Strategy, https://www.whitehorse.vic.gov.au/sites/whitehorse.vic.gov.au/files/assets/documents/Whitehorse%20Housing%20Strategy%20April%202014%20Intro%20and%20Chapters%201-4%5B1%5D.pdf.p. vii

[8] City of Whitehorse, 2014 p. 40

[9] SGS Economics and Planning on behalf of the City of Whitehorse, 2018, City of Whitehorse Student Accommodation Strategy. https://www.whitehorse.vic.gov.au/sites/whitehorse.vic.gov.au/files/assets/documents/Student%20Accommodation%20Strategy%2024%20August%202018.pdf. p. 7

housing is considered to be close to campuses and/or public transport and services.

2.3.3 MONASH HOUSING STRATEGY

The *Monash Housing Strategy 2014* identifies initiatives and actions to be implemented by Council to facilitate a wider range of housing types, and to balance the need to provide for current and future demand while maintaining key elements of valued neighbourhood character across the municipality and enhancing sustainability.

The objectives of the strategy are as follows:

- To provide accommodation for a diverse and growing population that caters for different family, cultural and lifestyle preferences and a variety of residential environments and urban experiences.
- To encourage the provision of a variety of housing styles and sizes that will accommodate the future housing needs and preferences of the Monash community.
- To recognise and provide for housing needs of an ageing population.
- To ensure that development is appropriate with regards to the residential environment of the area, in particular neighbourhood character and amenity.
- To ensure that heritage dwellings and precincts are identified and conserved.
- To recognise the need to conserve treed environments and revegetate other areas, including new residential developments, to maintain and enhance the Garden City Character of the municipality.
- To encourage efficient use of existing physical and social infrastructure.
- To encourage high standards of architectural design in buildings and landscaping associated with residential development that takes into account environmental constraints including soil erosion, urban water management and fire risk.
- To encourage building practices and dwelling preferences that are energy efficient and sustainable and that incorporates landscape design and use of construction materials that minimises environmental impacts.
- To ensure appropriate infrastructure is provided to meet changing community needs that also complies with the principles of environmentally sustainable development.
- To revitalise Monash's activity centres by supporting higher density residential and mixed use development.
- To ensure that housing in Monash is accessible and safe.10

The Strategy identifies that *'the need for the City of Monash to adopt a proactive role to address housing issues is imperative, as opportunities for residential growth are limited within established areas'*.[11]

While the Strategy aims to maintain the predominately single-detached dwelling style in suburban residential areas, it seeks to maximise development potential around activity centres, the employment cluster and transport nodes.

2.3.4 MONASH AFFORDABLE HOUSING STRATEGY

In response to rising house prices and rents, along with limited investment in social and affordable housing leading to a dramatic increase in the number of households experiencing housing stress, the Monash City Council adopted the *Monash Affordable Housing Strategy* in 2023.

The Strategy and actions outlined are targeted to increase the amount of affordable housing available, and over the longer term, reduce demand for affordable housing by increasing housing affordability within Monash.

The Strategy seeks to:

[10] Planisphere, 2014, Monash Housing Strategy 2014 for the Monash City Council, https://www.monash.vic.gov.au/files/assets/public/v/1/edms/planning-development/strategic-planning/monash-housing-strategy-2014.pdf., p. ix

[11] Ibid, p. 2.

- *Prioritise, facilitate and increase the availability of affordable housing.*
- *Advocate for improved housing affordability and increase supply of affordable housing in Monash.*[12]

It is noted that Activity Centres are a prime location for affordable housing:

> *Activity centres in Monash have significant scope for increased density and development uplift. They are suitable for the provision of a more diverse and affordability range of housing types, particularly because they provide the ability for affordable housing to be located in close proximity to employment, services and shops.*[13]

The Strategy also identifies precinct planning for the SRL precincts should ensure the inclusion of affordable housing:

> *Action 5.1 – Advocate for the provision of substantial amounts of affordable housing in the Suburban Rail Loop Station Precincts at a level that reflects the future residential and workforce aspirations and subsequent forecast needs in the precincts.*[14]

2.4 Implications for Burwood Structure Plan

SRL East will contribute to achieving the objectives of Victorian Government and local government policies and strategies relating to housing, particularly increasing quickly the supply of more housing options, including affordable housing, to meet demand due to population growth.

Specific implications of the policy landscape for development of the Burwood Structure Plan include:

- Burwood will play a vital role in supporting population growth and enhancing housing density and diversity in a strategic urban location, given the Burwood Highway transport corridor and the addition of the new SRL station.
- Victorian Government and local government policies point to the following themes for housing delivery in Burwood:
  - » Provide housing opportunities close to where people work and key public transport nodes. As a designated education precinct, Burwood is strategically well-positioned to accommodate student accommodation close to Deakin University.
  - » It is necessary to guarantee sufficient housing stock and appropriately allocate land use for both present and future residents, while also maintaining a balance to ensure ample land remains available for employment purposes.
  - » Considerations for height limits and development styles will need to be made to not compromise the natural assets such as Gardiners Creek.
  - » There is an identified need for improved housing diversity and affordability, including the provision of social housing.

[12] City of Monash (2023), "Monash Affordable Housing Strategy. https://hdp-au-prod-app-mon-shape-files.s3.ap-southeast-2.amazonaws.com/8516/9579/1805/Adopted_Monash_Affordable_Housing_Strategy-_September_2023_D23-279390.PDF. p. 6

[13] City of Monash (2023), p. 20

[14] City of Monash (2023), p. 23

3. Trends towards high-density development

This section provides an overview of trends in high-density living world-wide as well as the location and type of high-density development in Melbourne to date.

3.1 Shift to high-density living

The share of the global population living in cities has accelerated rapidly. From 1950 to 2018, the proportion of the world's population living in urban areas increased from 30% to 55%, and projections indicate it will increase to 68% by 2050.[15]

As more people migrate to cities, high-density living has become more common. However, Australian cities have been relatively slow in embracing higher densities, despite being one of the world's most urbanised countries with around 92% of people living in urban areas.[16] Australia has one of the lowest rates of high-density housing among OECD countries, about 65% lower than the OECD average[17], as shown in Figure 3.1.

Australia's growth model has seen cities spread outwards and new homes developed in greenfield areas (e.g. former rural and agricultural areas). However, as cities continue to grow, urban sprawl is increasingly untenable.

As outlined by the OECD:

> *Urban sprawl creates negative impacts, such as higher infrastructure costs and diminished energy and resource efficiency. It can also result in encroachment on agricultural land, forests, open space or wetlands, with a corresponding loss of the economic, recreational and ecological values provided by those ecosystems. Longer commuting times without affordable public transport systems also diminishes access to jobs and services for many urban residents.*
>
> *Compact urban form, characterised by dense and proximate development patterns linked by public transport systems and with accessibility to local services and jobs, can counteract such negative impacts and maximise the economic, social and environmental potential of cities. It is associated with a wide range of urban benefits, including increased productivity due to agglomeration economies, improved accessibility to urban services, reduced travel times, and a smaller ecological footprint due to lower energy and land consumption.*[18]

Denser living generates urban advantages and also improves affordability.

Australian cities face significant housing affordability challenges. As of 2023, Sydney's housing market ranked as the second-least affordable globally, with Melbourne in 9th place, Adelaide in 14th, and Brisbane in 15th.[19]

Housing prices have significantly increased compared to income levels, leading to a decline in home ownership. From 1995 to 2020, the proportion of renter households across Australia increased from 26% to 31%, and the proportion of homeowners who own their home outright has also decreased.[20]

Apartments offer a more affordable option, with median prices 55% lower than houses in Melbourne.[21] Expanding the housing stock to include more townhouses and apartments is crucial to maintain a sustainable balance between growth and liveability and ensure residents can find homes that meet their needs and preferences.

[15] United Nations, 2018, "World Urbanization Prospects 2018." https://population.un.org/wup/Publications/Files/WUP2018-Highlights.pdf.

[16] Australian Bureau of Statistics (2021), TableBuilder, counting persons, place of enumeration, ABS Website, accessed March 2024.

[17] Data on residential dwelling stock refer to 2020, except for Costa Rica (2021), the United States (2019), Canada, Colombia, Iceland, Japan, New Zealand, Chile (2017) and Australia (2021).

[18] OECD, [online] Available at https://www.oecd.org/regional/cities/compact-urban-development.htm, accessed March 2024

[19] Cox, W, 2024, Demographia International Housing Affordability 2024 Edition, Chapman Universityhttp://www.demographia.com/dhi.pdf

[20] Australian Bureau of Statistics (2019-20), Housing Occupancy and Costs, ABS Website, accessed March 2024.

[21] CoreLogic (2024) Hedonic Home Value Index, April 2024.

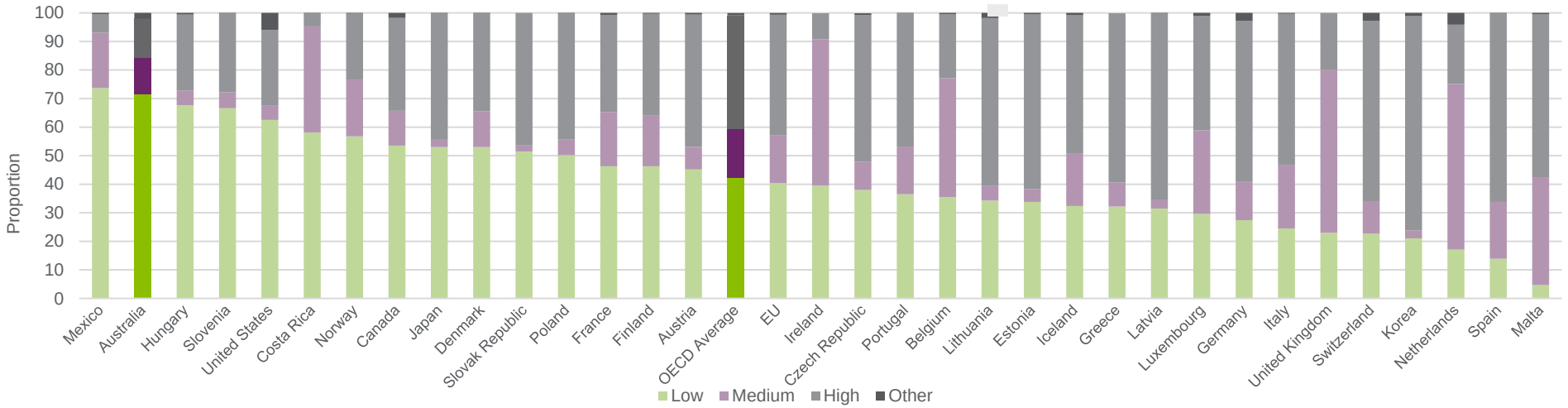


FIGURE 3.1 HOUSING MIX (% OF TOTAL OCCUPIED RESIDENTIAL DWELLING STOCK), OECD COUNTRIES, 2020

Source: OECD Housing Material Hm15:2023); AJM JV

3.2 Trends in household size

As household sizes decrease, housing demand and preferences are shifting, creating a need for various types of dwellings. Higher-density development can cater to a diverse range of household types, particularly smaller households.

In Australia, the average number of people living in each household has declined from around 4.5 in 1910[22], to 2.9 in the mid-1980s to around 2.5 more recently.[23]

Similar trends are observed worldwide, with a global shift towards an average household size of just over two people, as shown in Figure 3.2.

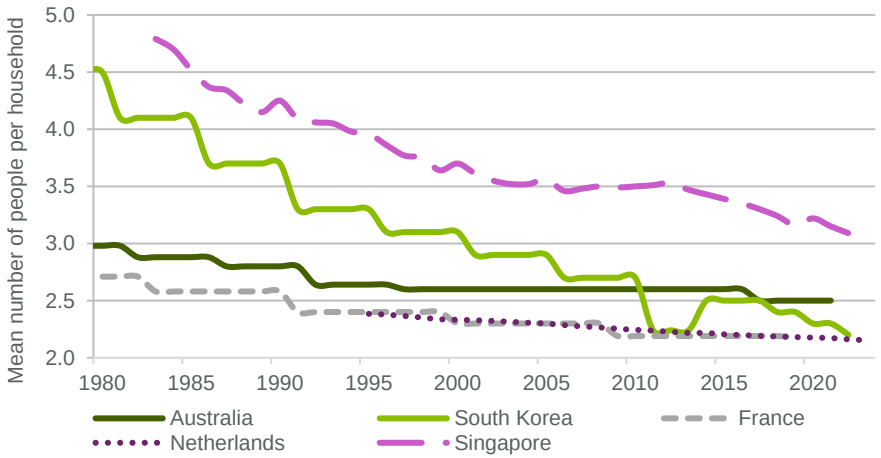


FIGURE 3.2 HISTORICAL HOUSEHOLD SIZE, SELECT COUNTRIES, 1980–2023
Source: Statista, ABS; AJM JV

Major factors driving the decrease in household sizes include declining fertility rates, later marriages, higher divorce and separation rates, more solo living, and an ageing population.

Australia's fertility rate has steadily declined from 2.06 in 1975 to 1.63 in 2022 as shown in Figure 3.3.

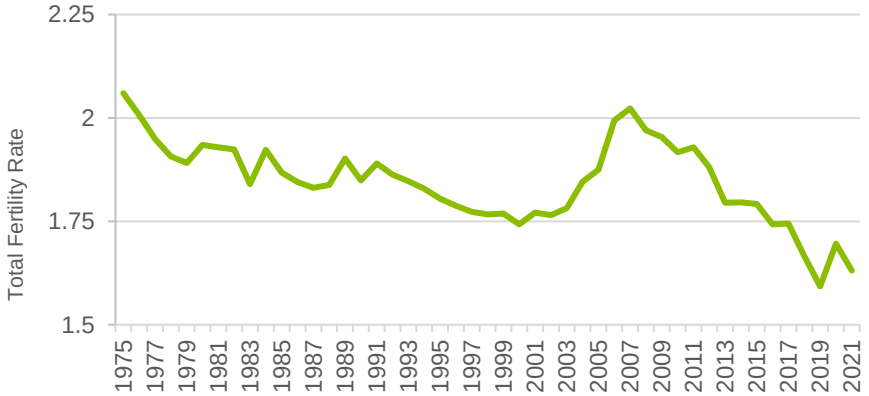


FIGURE 3.3 HISTORICAL FERTILITY RATE, AUSTRALIA, 1975–2021
Source: AIHW, 2024

[22] Qu L, Baxter J and Gorniak M (2023) Population, households and families https://aifs.gov.au/research/facts-and-figures/population-households-and-families, Australian Institute of Family Studies

[23] Agarwal N, Bishop J and Day I, (2023) A New Measure of Average Household Size, RBA, https://www.rba.gov.au/publications/bulletin/2023/mar/a-new-measure-of-average-household-size.html

Lone person households have increased from 18% of all households in 1981 to 26% in 2021[24], as shown in Figure 3.4. Family households, including couples with and without children, have declined as a share of the total.

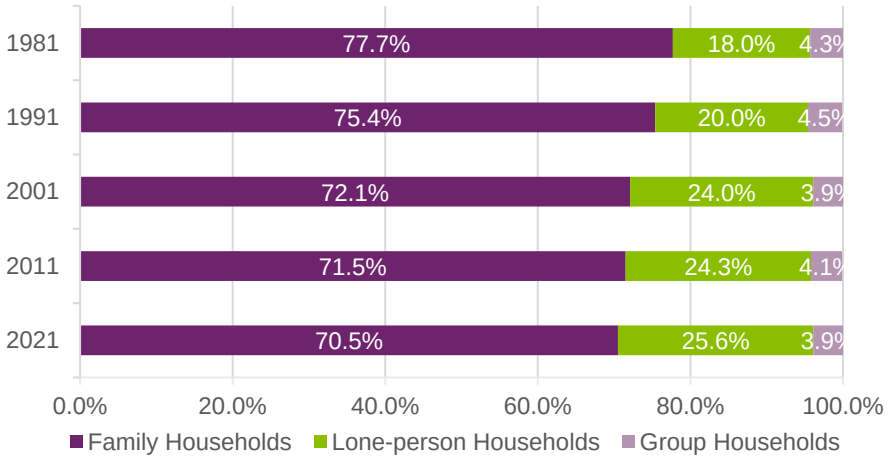


FIGURE 3.4 HOUSEHOLD TYPE, AUSTRALIA, 1981–2021
Source: ABS, AJM JV

While households have become smaller, the consumption levels of land have remained unchanged to date, as those living in smaller numbers, retain their demand for larger block sizes.[25]

3.3 High-density development in Melbourne

Changes in the types and locations of apartment development in Melbourne in recent years are discussed below.

3.3.1 TYPE OF APARTMENTS DELIVERED

In the year to October 2015, apartment approvals in Melbourne peaked, with approximately 26,500 approved apartments across Greater Melbourne. This represented 44% of total dwelling approvals over that period.

Much of Melbourne's recent apartment stock has been small one and two-bedroom apartments catering to investors.

Since 2015, 36% of the off-the-plan apartments built in Melbourne have been one-bedroom units, 56% have been two-bedroom units, and only 8% have been three-bedroom units.[26]

From 2015 to 2017, the average size of a one-bedroom apartment was approximately 52 sq.m.[27]

Better Apartment Design Standards (BADS) were introduced into the Victorian Planning Scheme in 2017. These standards aim to improve apartment design and amenity outcomes.

Over the year leading up to Q1 2017, the average size of off-the-plan one-bedroom apartments was 52.3 sq.m. By Q1 2024 (following the introduction of BADS), the average size had increased to 56.5 sq.m.[28]

[24] Qu L, Baxter J and Gorniak M, (2023)
[25] Qu L, Baxter J and Gorniak M, (2023)
[26] Urbis (2024) Apartment Essentials, accessed March 2024
[27] Urbis (2024)
[28] Urbis (2024)

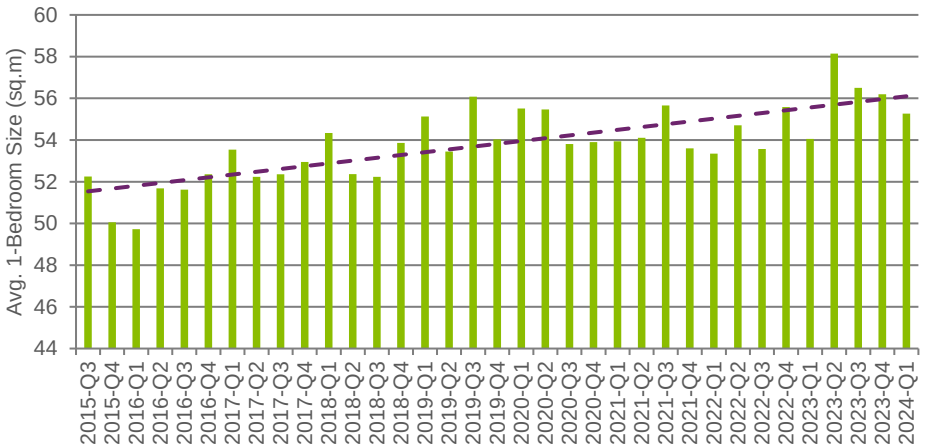


FIGURE 3.5 WEIGHTED AVERAGE MID-POINT 1-BEDROOM APARTMENT SIZE, GREATER MELBOURNE, Q3 2015 – Q1 2024

Source: Urbis Apartment Essentials

3.3.2 TYPE OF APARTMENTS NEEDED

Over the past few decades, Australian households have undergone significant changes, leading to a mismatch between the existing housing stock and current demand.

The decrease in household sizes (as outlined in section 4.1.1), combined with affordability concerns, have led to a shift in the demand for larger apartments (two and three-bedroom) and an increasing misalignment between the market's supply and growing demand for larger apartments.

This demand mismatch has been illustrated by a lack of property listings for both units and houses. As of March 2024, 40% of searches on realestate.com.au were for three-bedroom units, with three-bedroom listings only making up 25% of house listings.[29]

It is also important to note that this increased demand for larger apartments is likely driven by young working professionals seeking lifestyle and amenity, and also families seeking an affordable alternative to a detached dwelling.

As such there is a need to increase the development of larger units to meet the changing needs of Australians.

Apartment options for families are improving but still limited. Between 2015 and 2019 only 6% of apartments constructed had three or more bedrooms, since 2019, however, 10% of apartments constructed have three or more bedrooms.[30]

[29] Realestate.com.au (2024) The great housing mismatch: Why Aussie homes are no longer meeting our needs, https://www.realestate.com.au/insights/the-great-housing-mismatch-why-aussie-homes-are-no-longer-meeting-our-needs/

[30] Urbis (2024)

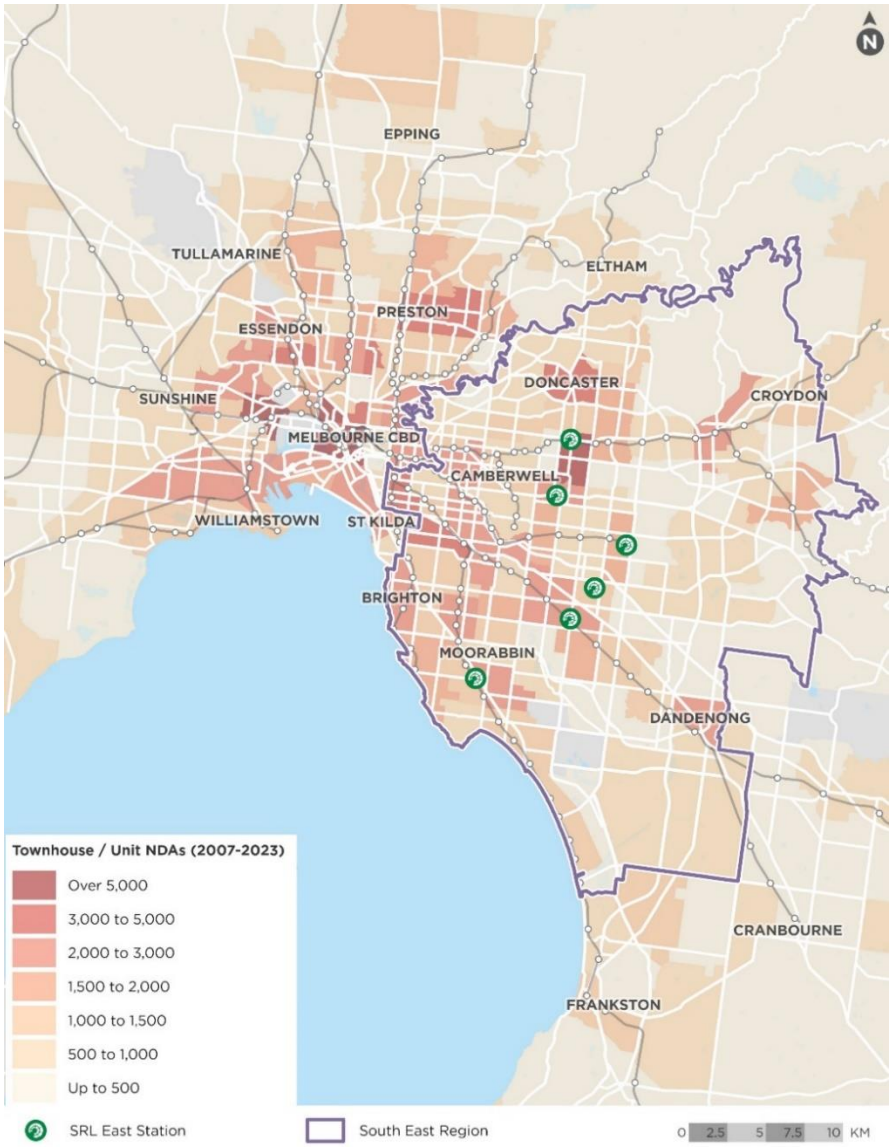
3.3.3 KEY CLUSTERS OF HIGH-DENSITY DEVELOPMENT IN MELBOURNE

Figure 3.6 shows locations across Melbourne where higher density has been approved in the past 10 years, relative to the locations of the six SRL station locations. Most apartment development has occurred in the inner city and a few middle-ring hotspots. Figure 3.6 highlights the trends in townhouse and unit development proposals across Greater Melbourne:

- There is a general expansion of density starting in the CBD and radiating out.
- Beyond the CBD and city fringe, there are pockets of density at an evenly spaced distance from the CBD at the likes of Footscray, Sunshine, Essendon, Coburg, Preston, Doncaster and Box Hill. All these areas support large activity and shopping centres or are designated Metropolitan Activity Centres.
- Higher density development follows major roads and train lines, and where there are inner to middle-ring suburbs with low-density, there is often a lack of transport linkages servicing them.
- The disparity in prices between houses and apartments is also a contributing factor to the emergence of clusters of high-density development. Areas where houses are significantly more expensive than apartments are seeing more demand for apartments (Figure 3.7).

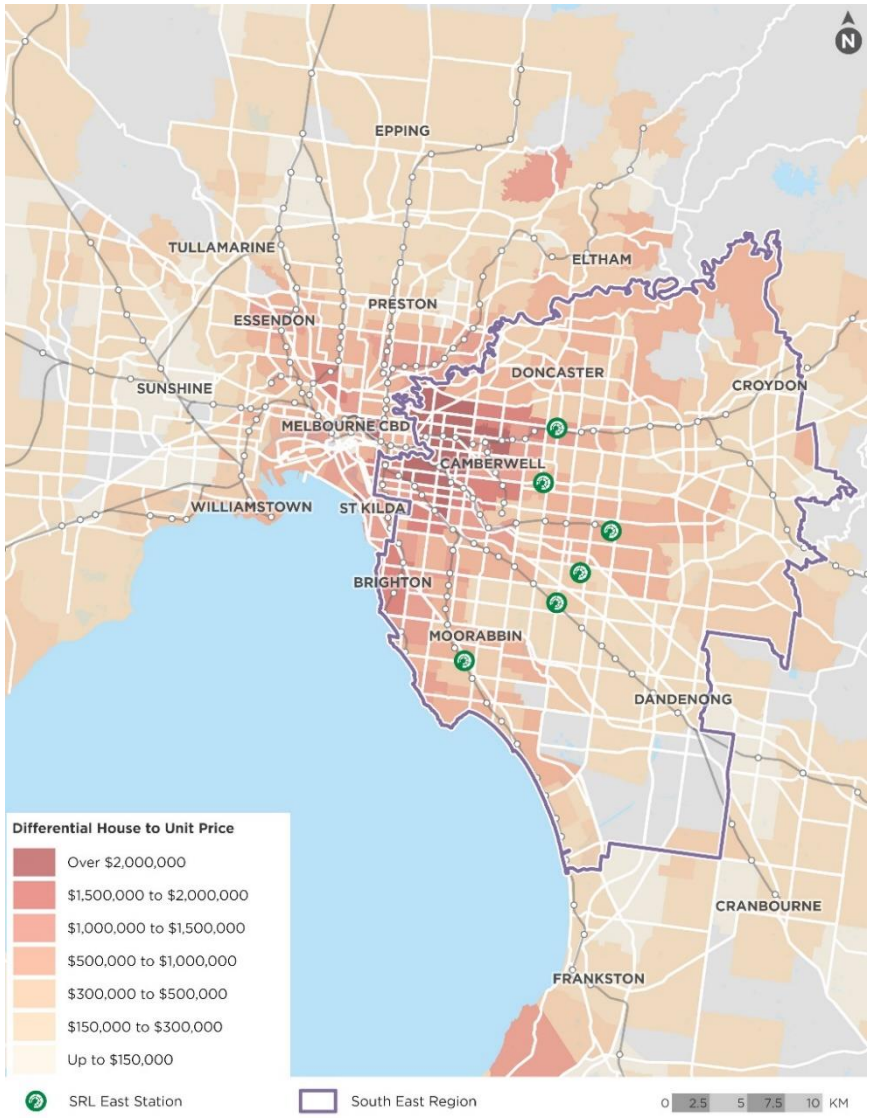
As illustrated in Figure 3.6, apartment development has not yet significantly commenced in the middle ring and SRL East Structure Plan areas, with the exception of Box Hill and, to a lesser extent, Glen Waverley. Several factors contribute to this, including inadequate transport options (Burwood, Monash), the slightly greater distance from the CBD placing some areas just on the fringe of where higher density development is occurring, underdeveloped activity centres (Burwood, Monash), extensive areas of established low-density housing where change is gradual, and relative affordability (see Figure 3.7).

While proximity to the CBD is one driver of high-density development, as travel times increase with density and in line with the concept of providing jobs close to where people live, proximity to suburban employment centres will be a driver too.



Source: ABS; AJM JV

FIGURE 3.6 TOWNHOUSE AND UNIT NEW DWELLING APPROVALS, 2014–2023



Source: ABS; AJM JV

FIGURE 3.7 PRICE DIFFERENTIAL BETWEEN HOUSE AND UNITS, YEAR TO JUNE 2023

3.3.4 DRIVERS OF HIGH-DENSITY DEVELOPMENT

To understand the conditions that have facilitated significant high-density development (particularly apartments) in Melbourne in more detail, five case study precincts were analysed.

The precincts studied are areas of Melbourne that have seen a significant level of apartment development in recent years and include:

- Footscray
- Brunswick
- Collingwood
- Richmond – North
- Caulfield – North.

These case study locations have not been selected to suggest conditions in the SRL East station areas are directly comparable, but rather to understand the influence factors such as planning zones, developable lot sizes, and number of residential developers have played in facilitating high-density development.

As shown in Figure 3.8, these precincts saw a significant increase in the number of apartments between 2011 and 2021, ranging from +32% in Caulfield-North to +165% in Collingwood.

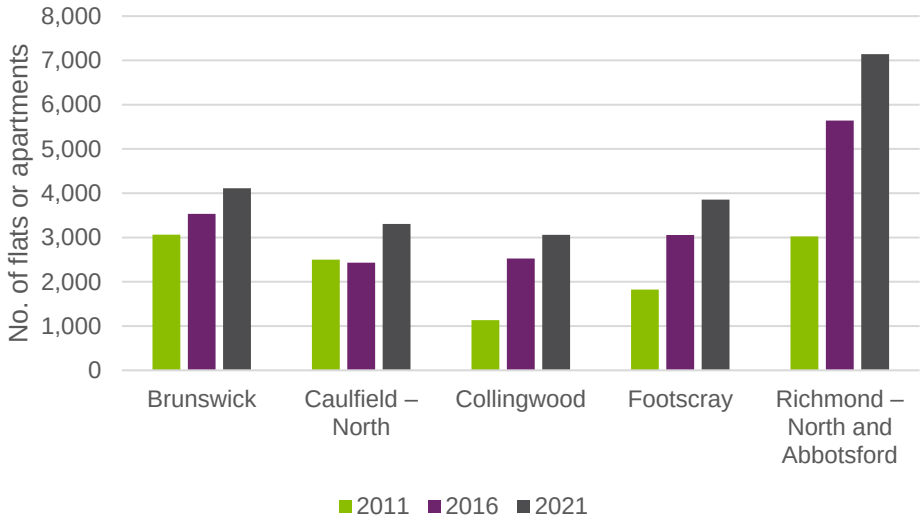


FIGURE 3.8 DWELLING STRUCTURE – FLAT OR APARTMENT (NO.), 2011-2021

Note: Data is based on occupied private dwelling structure. Source: ABS Data by region 2011-2023, by ASGS main structure (ASGS Edition 3 (2021 – 2026))

Analysis of data from Urbis Apartment Essentials, including projects built since 2014 and those currently under construction, identified common factors driving significant increases in density, such as zoning and amenities. Additionally, the relationship between yield (i.e. the number of apartments) and lot size, as well as the number of developers involved, was examined.

All precincts benefit from significant retail facilities (convenience and discretionary based retail), entertainment and lifestyle options, and are easily accessible by multiple modes of public transport, including trains and trams. When sacrificing living space, it is essential residents have access to a high-level of external amenity in return.

Table 3.1 highlights the land zones where development has occurred, showing the number and percentage of the total dwellings delivered in that suburb in each zone.

Across all precincts, most dwellings have been constructed in mixed-use environments where there is a combination of residential and employment activity. The number of apartments delivered is fairly evenly distributed among C1Z, ACZ1, and MUZ zoned land, with 26%, 24%, and 30% respectively, noting the areas each have different combinations of available zones. A further 13% of apartments were delivered in Priority Development Zones applicable to development in Caulfield – North and Richmond – North / Abbotsford.

Residential growth zones have contributed relatively little to the overall development, despite being predominantly residential zones intended to drive more growth. This indicates that it is challenging to achieve significant growth in standard residential zones when applied over existing low-density residential areas.

TABLE 3.1 PLANNING ZONES OF PROJECTS (TOTAL NUMBER AND PROPORTION OF DWELLINGS), 2014-2024 YEAR TO DATE

	ACTIVITY CENTRE ZONE 1 (ACZ1)	COMMERCIAL ZONE 1 (C1Z)	GENERAL RESIDENTIAL ZONES (GRZ1, GR2, GRZ3, GRZ4)	MIXED USE ZONES (MUZ, MUZ1)	NEIGHBOURHOOD RESIDENTIAL ZONE 1 (NRZ1)	PRIORITY DEVELOPMENT ZONES (PDZ1, PDZ2)	RESIDENTIAL GROWTH ZONE 1 (RGZ1)	TOTAL
Brunswick	-	1862	44	1237	-	-	-	**3143**
	-	59%	1%	39%	0%	0%	0%	**100%**
Caulfield – North	-	-	152	-	-	900	61	**1113**
	-	-	14%	-	-	81%	5%	**100%**
Collingwood	-	775	-	1589	-	-	-	**2364**
	-	33%	-	67%	-	-	-	**100%**
Footscray	4036	-	137	1400	-	-	-	**5573**
	72%	-	2%	25%	-	-	-	**100%**
Richmond - North and Abbotsford	-	1623	561	755	38	1325	-	**4302**
	-	38%	13%	18%	1%	31%	-	**100%**

Source: Urbis Apartment Essentials

Figure 3.9 shows the spread of development size (number of units) and lot size (sq.m) across the different case study precincts.

Across all precincts, the median development size in terms of the number of apartments is approximately 70. These developments are typically situated on lots around 1500 sq.m in size. It is important to note that there are a few outliers, which are large mixed-use sites that include additional facilities on the same lot, such as retail spaces (e.g., Caulfield Village).

The relationship between the number of apartments and lot size is influenced by typology, as shown in Table 3.2. For instance, the lot size required for developments with 450-500 apartments can vary significantly based on their typology: Caulfield Heath, with 463 dwellings across five buildings with a maximum of five stories, occupies 14,500 sq.m, allowing for considerable space between buildings. In contrast, Green Square in Richmond has 500 apartments within a single nine-storey structure, occupying around 6500 sq.m.

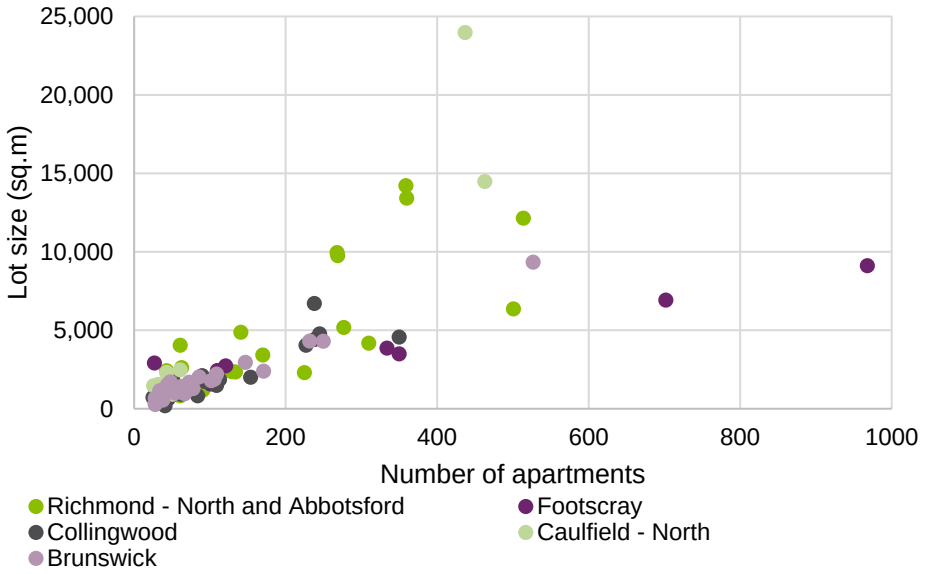


FIGURE 3.9 DEVELOPMENT SIZE (NO. OF APARTMENTS) VS. LOT SIZE (SQ.M), 2014-2024 YEAR TO DATE

Source: Urbis Apartment Essentials

TABLE 3.2 MEDIAN DEVELOPMENT AND LOT SIZE, 2014-2024 YEAR TO DATE

	BRUNSWICK	CAULFIELD – NORTH	COLLING-WOOD	FOOTSCRAY	RICHMOND – NORTH AND ABBOTSFORD	TOTAL
Median dev. size (no. apts.)	62	51	77	121	129	**68**
Median lot size (sq.m)	1200	2306	1282	2911	2414	**1559**

Source: Urbis Apartment Essentials

Table 3.3 displays the top five developers in each precinct, including their share of the total precinct apartments delivered. Some insights from this data include:

- In general, there is a mix of developers across the precincts.
- Richmond-North and Abbotsford and Caulfield-North, however, have been master-planned or overseen by one or a few large developers. The market share of Salta and Beck is anticipated to grow even further as they have more apartments in the pipeline in Richmond – North and Abbotsford and Caulfield – North.
- Generally, when a single developer is responsible for a large number of apartments, they also provide additional facilities, such as retail spaces, alongside the residential units.

This last point is important to note in relation to the delivery of growth around the SRL stations. It highlights that significant growth in dwelling numbers can be more easily achieved when one or few developers are responsible for a large share of the new development, with residential development supported by complementary delivery of retail and other amenity. Less coordinated development across a greater number of parties can result in slower change and delayed delivery of important community facilities.

TABLE 3.3 TOP 5 DEVELOPERS IN EACH PRECINCT BY NUMBER OF APARTMENTS CONSTRUCTED OR UNDER CONSTRUCTION, 2014-2024 YEAR TO DATE

	BRUNSWICK	CAULFIELD – NORTH	COLLINGWOOD	FOOTSCRAY	RICHMOND – NORTH & ABBOTSFORD
1	Mirvac (527, 17%)	Beck Property Group (463, 42%)	Gurner (471, 20%)	R&F Properties (1400, 25%)	Salta Properties (1137, 26%)
2	Hines (250, 8%)	Realm (437, 39%)	SMA Projects (350, 15%)	Growland Group (1068, 19%)	Blue Earth Group (587, 14%)
3	CBD Development Group (232, 7%)	BNG Group (61, 5%)	Banco Group (238, 10%)	AZX Group (968, 17%)	Home (GFM) (360, 8%)
4	Neometro Developments (212, 7%)	Chocolate Towers Pty Ltd (51, 5%)	Urban Inc (227, 10%)	Investa (702,13%)	Hamton (359, 8%)
5	Assemble (171, 5%)	Platinum Investments Pty Ltd 43, 4%)	Cbus Property (154, 7%)	Bensons Property Group (350, 6%)	Marne Properties (269, 6%)

Source: Urbis Apartment Essentials

In summary, the analysis suggests key drivers of density can include mixed-use zoning or equivalent; transport links, especially rail and trams; and retail and lifestyle amenity. For a standard development of around 70 apartments, a lot size of around 1500 sq.m is required. A mix of developers is typical, however, generally a single developer with a larger market share is able to provide more amenities within the residential developments.

3.4 Implications for Burwood Structure Plan

The analysis in this section highlights the following considerations for the Burwood Structure Plan:

- Although a large portion of Australia's population lives in urban areas, the country has been slow to adopt high-density housing, favouring low-density detached homes instead. Despite changing household types, the delivery of alternative housing stock has not yet increased significantly in response.
- There is currently a mismatch between the existing housing stock and current demand, highlighting the need for more development of larger units with three bedrooms or more.
- High density development in Melbourne has primarily occurred in the inner city and a few middle-ring hotspots, driven by good transport links, access to amenity, and an increasing gap between prices of houses and apartments. These elements are currently not all present in the Burwood Structure Plan Area. As such, there has been very limited high-density development in Burwood. While the introduction of the SRL East station will provide transport connections, other changes to enhance amenity such as a town centre with retail will encourage greater density.
- Case study analysis indicates high-density infill development has generally been delivered through zones that allow a mix of uses (e.g. MUZ, ACZ, C1Z, PDZ). Standard residential zones have not supported large increases in apartment numbers. In the Burwood context, there is a limited amount of Activity Centre or Mixed Use zoned land, although some C1Z land exists. This underscores the crucial role that development around the station will play in increasing housing availability.
- It may be necessary to redevelop under-utilised commercial or industrial land to achieve high-density development in Burwood. This particularly applies along the Burwood Highway corridor. The typical lot size in the case study precincts was over 1500 sq.m. Encouragement of site amalgamation may therefore also be necessary to ensure sufficient access to large development sites.

Part B: Current state

Part B includes:

- **Section 4** describes the existing resident characteristics and housing stock in the Structure Plan Area.
- **Section 5** considers housing costs and affordability in the Structure Plan Area.
- **Section 6** outlines trends in housing supply in the Structure Plan Area, including recent and proposed developments.

4. Population and housing characteristics

This section provides an overview of the current resident characteristics and nature of housing in the area, based on the 2021 Census.

Data is presented for the Structure Plan Area and benchmarked against the South East Region and Greater Melbourne.

4.1 Historical population growth

Figure 4.1 shows the population growth in the Structure Plan Area from 2011 to 2023. As of 2023, the Burwood Structure Plan Area recorded a resident population of around 5900. The Structure Plan Area experienced strong population growth from 2011 to 2023 of 2.1% per annum, compared to 0.9% across the South East Region and 1.9% across Greater Melbourne. From 2016 to 2021 population in the Structure Plan Area declined slightly at a rate of -0.7% per annum, primarily due to the impact of COVID on student residents. Population growth has since pick up to high levels with 5.5% annual growth from 2021 to 2023.

The Burwood Structure Plan Area has, therefore, seen a modest increase in density from 2011 to 2023 from 17.5 to 22.4 people per hectare. Comparatively, the South East Region and Greater Melbourne experienced a lower rate of growth in population density.

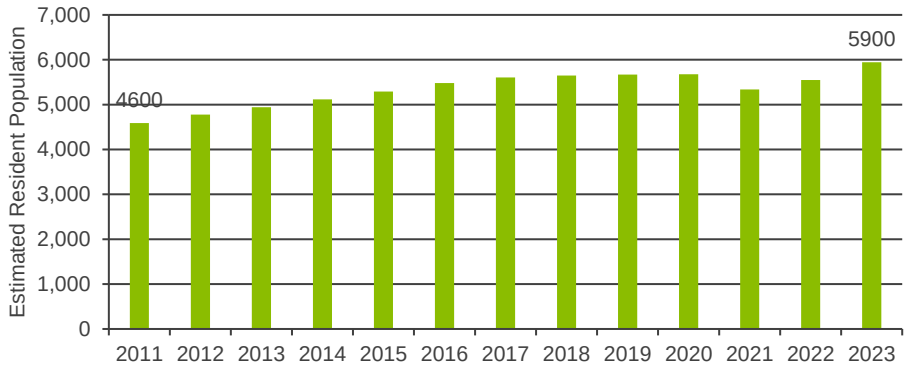


FIGURE 4.1 HISTORICAL POPULATION GROWTH, BURWOOD STRUCTURE PLAN AREA, 2011-2023 (YEAR TO JUNE)

Source: ABS ERP; AJM JV

TABLE 4.1 HISTORICAL POPULATION AND DENSITY

POPULATION (NO.)				
	2011	**2016**	**2021**	**2023**
Burwood Structure Plan Area	4600	5500	5300	5900
South East Region	1,503,200	1,618,900	1,614,900	1,665,400
Greater Melbourne	4,169,400	4,714,400	4,975,300	5,207,100
ANNUAL POPULATION GROWTH (%)				
		2011-2016	**2016-2021**	**2021-2023**
Burwood Structure Plan Area		3.6%	-0.7%	5.5%
South East Region		1.5%	0.0%	1.6%
Greater Melbourne		2.5%	1.1%	2.3%
DENSITY (PERSONS PER HECTARE)				
	2011	**2016**	**2021**	**2023**
Burwood Structure Plan Area	17.5	20.9	20.1	22.4
South East Region	18.4	19.8	19.8	20.4
Greater Melbourne	4.2	4.7	5.0	5.2

Source: ABS ERP; AJM JV

4.2 Resident characteristics

4.2.1 CURRENT DEMOGRAPHICS

Table 4.2 shows the demographic profile of existing residents within the Structure Plan Area and precinct compared to Greater Melbourne. Detailed sociodemographic data can be found in Appendix C.

The profile of residents in the Structure Plan Area is heavily influenced by the presence of Deakin University:

- 1 in 5 residents are undertaking tertiary education.
- There is a skew to younger age brackets with 27% aged 15-24 years, compared to just 12% across Greater Melbourne.
- Residents have lower household incomes than the Greater Melbourne average.
- There is a high share of group households (12% compared to 4% across Greater Melbourne).
- There is a high proportion of renters in the Structure Plan Area at 44%, compared to Greater Melbourne at 31%.
- Compared to Greater Melbourne, there is a higher proportion of overseas-born residents in the Burwood Structure Plan Area at 53%.
- There is only a moderate proportion of high-density dwellings within the Structure Plan Area at 10%. Comparatively, 13% of dwellings in Greater Melbourne are high-density. The Structure Plan Area has a higher proportion of medium-density dwellings than Greater Melbourne and, conversely, a lower share of low-density dwellings.

TABLE 4.2 DEMOGRAPHIC PROFILE, BURWOOD STRUCTURE PLAN AREA COMPARED TO BENCHMARKS, 2021

	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE
Income			
Per capita Income	$46,260	$48,471	$46,017
Var. from Melbourne average	1%	5%	-
Average household income	$108,699	$127,711	$119,232
Var. from Melbourne average	-10%	7%	-
Age profile			
% 0-14 years	11%	16%	18%
% 15-24 years	27%	13%	12%
% 25-39 years	28%	21%	24%
% 40-54 years	15%	20%	20%
% 55-65 years	7%	12%	11%
% 65+ years	12%	18%	15%
Household type*			
Couple family no children	20%	24%	23%
Couple family with children	24%	33%	32%
One parent family	10%	9%	10%
Other family households	3%	2%	2%
Lone person household	26%	25%	24%
Group household	12%	4%	4%
Other	4%	3%	4%
Dwelling density*			
Low-density	57%	61%	66%
Medium-density	34%	27%	22%
High-density	10%	11%	13%

	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE
Housing tenure*			
Owned outright	29%	36%	30%
Owned with a mortgage	27%	34%	38%
Rented	41%	29%	30%
Other metrics			
Household size	2.4	2.4	2.4
% Overseas born	52%	39%	37%
% White collar workers	79%	79%	74%
% Blue collar workers	21%	21%	26%
% Undertaking tertiary education	24%	9%	8%

**Excludes non-private dwellings and other private dwellings. Source: ABS Census of Population and Housing 2021; AJM JV*

4.2.2 DEMOGRAPHIC CHANGE

Table 4.3 summarises key demographic trends in the Burwood Structure Plan Area based on changes observed between the 2011 and 2021 Census.

- The Burwood Structure Plan Area has grown its share of residents in the 25-39-year age group. Other age groups have a decreasing or stable share of the total over the 10 years to 2021. The 25-39-year age group as a percentage of the total is higher in the Structure Plan Area (28%) than in Greater Melbourne (24%). The proximity to the University and other educational establishments is likely to attract families to the area.
- There has been a significant rise in overseas-born residents in the Burwood Structure Plan Area, increasing by four percentage points (% pts) from 2011-2021. This compares to a 0% pt increase in Greater Melbourne.
- The greater focus on townhouse developments in the Structure Plan Area has resulted in medium-density dwellings having increased as a portion of the total dwellings in 2021 compared to 2011 by 10% pts over the ten years. Low-density dwellings have decreased as a percentage of the total over both periods by 18%. Low-density dwellings have also decreased in volume terms by 132 dwellings over the 10-years.
- In the Burwood Structure Plan Area, moderately increasing density has influenced the change in housing tenure over the 10 years to 2021. Rented dwellings (+4% pts) have increased as a portion of total tenure types over the 10 years to 2021 at a faster rate than Greater Melbourne. Outright homeownership decreased as a proportion of the total in Burwood (-9%).

TABLE 4.3 VARIATION IN THE PERCENTAGE POINT CHANGE FROM 2011-2021 IN BURWOOD VS GREATER MELBOURNE

	CHANGE	BURWOOD STRUCTURE PLAN AREA	GREATER MELBOURNE	VARIATION FROM GR. MELBOURNE CHANGE (%PT)
Per capita income	%	60%	35%	25%
Average household income	%	61%	40%	21%
Couple family no children	% point	2%	0%	1%
Couple family with children	% point	1%	-1%	1%
Lone person	% point	-3%	2%	-5%
Low-density dwellings	% point	-18%	-7%	-10%
Medium-density dwellings	% point	10%	10%	0%
High-density dwellings	% point	8%	-2%	10%
Owned outright	% point	-9%	4%	-13%
Owned with a mortgage	% point	3%	8%	-5%
Dwellings rented	% point	4%	9%	-5%
% Overseas-born	% point	4%	0%	4%

Note: Numbers rounded. Source: ABS Census of Population and Housing 2011 & 2021; AJM JV.

4.2.3 MOVERS ANALYSIS

The analysis here considers the profile of residents who have moved into or within the Structure Plan Area between 2016 and 2021. These 'movers' are distinct from residents living in the same location within the area since pre-2016 but include those moving houses within the area.

4.2.3.1 Origin of Movers

According to the 2021 Census, around 39% people currently in the Burwood Structure Plan Area were living in the same property as at the last Census. Of the 61% of people who moved to the area over the 5 years, the largest share of that group was from overseas (22%), with the next-largest coming from the surrounding SA2s of Burwood, Ashwood – Chadstone, Camberwell, and Box Hill (Figure 4.2). These are within the LGAs of Whitehorse, Monash and Boroondara which combined was the original location of 27% of residents who moved house (Table 4.4). This indicates a preference for people to stay within the local area.

It is noted that 1.2% of households were counted as not applicable or did not respond and these categories have been excluded from the analysis.

While most migration across Melbourne to the Burwood Structure Plan Area came from the local area from 2016 to 2021, this may change over the coming decades. Firstly, SRL will open the opportunity for people to live in Burwood who might work or study in other parts of the new rail corridor. Secondly, it is anticipated that movement from inner areas of Melbourne is likely to increase as prices remain high. Finally, there is also likely to be greater demand from outer areas due to the anticipated new housing offered within the area and the growing housing market.

Overseas demand will likely continue due to the proximity to Deakin University.

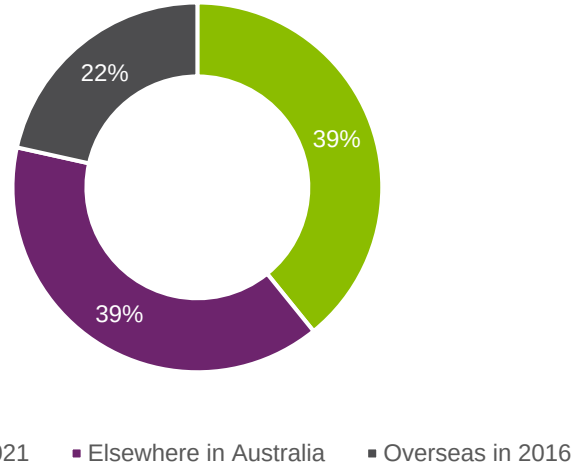


FIGURE 4.2 MIGRATION ANALYSIS - OVERSEAS VS. DOMESTIC, SHARE OF TOTAL HOUSEHOLDS

Note: Locations Burwood Structure Plan Area residents migrated from in the last 5 years and those who remained in the same place of residence compared to 2016. Source: ABS (2021) UAI5P Usual Address Five Years Ago Indicator; AJM JV

TABLE 4.4 MIGRATION ANALYSIS - TOP TEN LOCATIONS BURWOOD 2021 STRUCTURE PLAN RESIDENTS LIVED IN 2016

PLACE OF RESIDENCE 2016		SHARE OF PEOPLE WHO MOVED FROM 2016 TO 2021
1	Overseas	21.5%
2	City of Whitehorse	10.4%
3	City of Boroondara	8.5%
4	City of Monash	8.1%
5	City of Stonnington	2.3%
6	City of Manningham	2.0%
7	City of Knox	1.9%
8	City of Glen Eira	1.8%
9	City of Melbourne	1.4%
10	City of Wyndham	1.0%

Note: Data excludes not stated and not applicable responses. Includes only the people who moved into the Burwood Structure Plan Area between 2016 and 2021. The table shows their previous place of residence as of the 2016 Census. Source: ABS (2021) UAI5P Usual Address Five Years Ago Indicator Elsewhere in Australia, Local Government Areas of Usual Residence Five Years Ago; AJM JV

4.2.3.2 Characteristics of movers

Figure 4.3 to Figure 4.6 show the age cohorts, dwelling density, tenure types and incomes of people living in the Burwood Structure Plan Area at the 2021 Census. The key insights from this analysis are below:

- Movers (people who moved into or within the Burwood Structure Plan Area) were spread across age groups. The largest group moving, either domestically or overseas, were within the 20-39-year age group. Older residents were less likely to move.
- Low-density (50%), followed by medium-density (30%) have been the main housing preference for new residents to the Burwood Structure Plan Area between 2016 and 2021. While this broadly aligns with the current pattern of existing residents who are largely staying in low-density accommodation (73%), there is a weighting to higher-density forms.
- New residents to the Burwood Structure Plan Area over the 5 years to 2021 largely rented their new properties (60%). A further 27% purchased their new home with a mortgage and 9% bought their new home outright. This could indicate a portion of downsizers, or people moving from more expensive homes or areas. Over 50% of existing residents owned their homes outright, the rented tenure accounted for the smallest portion of existing residents (18%).
- Income levels were generally highest among those who did not move within the Burwood Structure Area or who moved domestically over the 5 years. The people migrating from overseas had the lowest incomes. This partly reflects the age profile of the groups and the fact many are studying at the University.

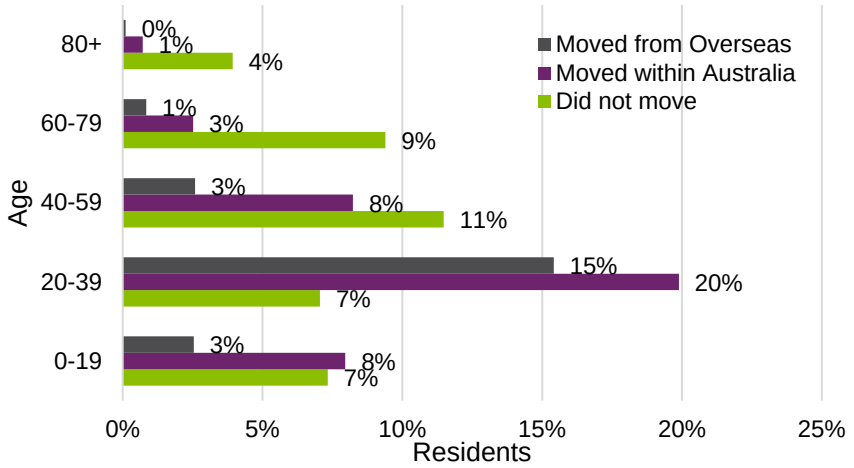


FIGURE 4.3 AGE COHORTS, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Percentages excluded not applicable and not stated Source: ABS (2021) AGE10P Age in Ten Year Groups; AJM JV

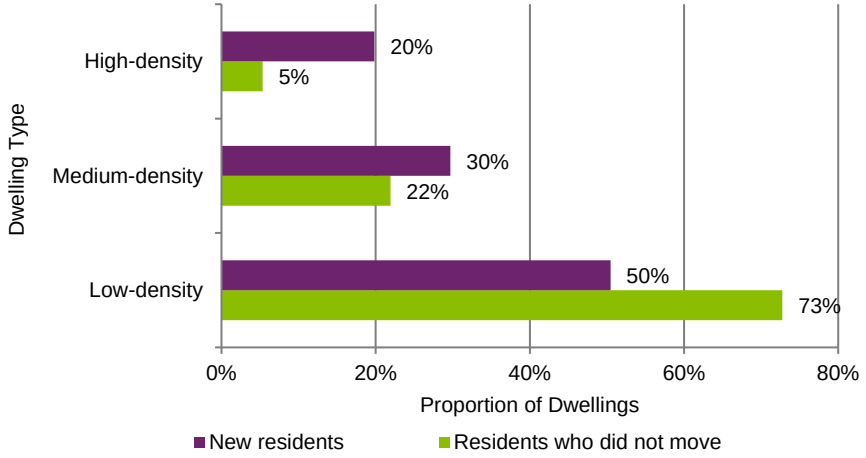


FIGURE 4.4 DWELLING DENSITY, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Percentages are the percentage of the total new residents or residents who did not move. Excludes not applicable or not stated. Source: ABS (2021) STRD Dwelling Structure MV5D Household Five Year Mobility Indicator; AJM JV.

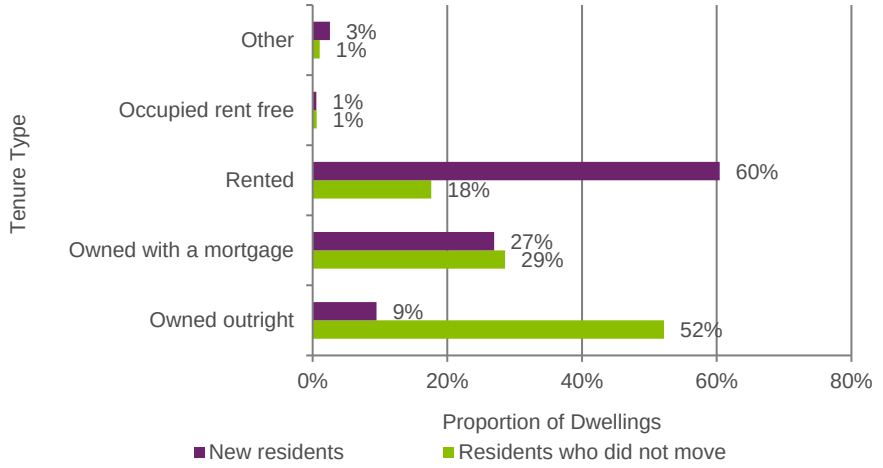


FIGURE 4.5 TENURE TYPE, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Percentages are the percentage of the total new residents or residents who did not move. Excludes not applicable or not stated. Source: ABS (2021) TEND Tenure Type, MV5D Household Five Year Mobility Indicator; AJM JV

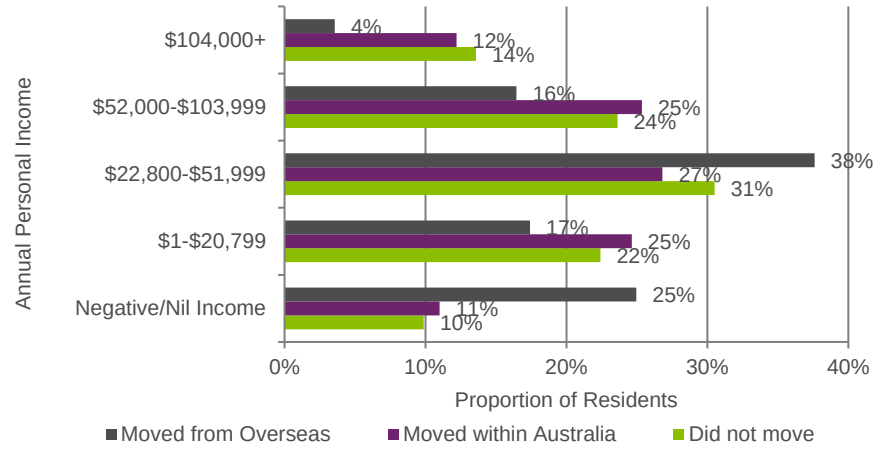


FIGURE 4.6 PERSONAL INCOME, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Percentages are the percentage of the total new residents from overseas or elsewhere in Australia or residents who did not move. Source: ABS (2021) INCP Total Personal income (weekly); AJM

4.3 Dwelling stock

This sub-section considers growth in occupied dwellings as well as the nature of dwellings, including dwelling density, tenure, and size (in terms of the number of bedrooms) in the Structure Plan Area compared to the wider South East Region and Greater Melbourne.

It also examines dwelling suitability to determine whether there is a mismatch between the dwelling stock and the requirements of residents in the Burwood Structure Plan Area.

This section also identifies the current supply of diverse accommodation which is tailored to specific housing needs (e.g. social and affordable, student housing, retirement/aged care) in the Structure Plan Area. When referring to renters in this section, it includes all renters, including social housing renters.

4.3.1 HISTORICAL DWELLING GROWTH

As of 2021, there were around 673,000 occupied dwellings in the South East Region, of which significantly less than 0.5% (around 2,140 dwellings) were located within the Burwood Structure Plan Area.

The number of dwellings in the Burwood Structure Plan Area increased by an annual average of 1.9% from the 2011-2016 and 2.0% from 2016-2021. This indicates moderate dwelling creation over the past decade. Comparatively, Greater Melbourne recorded a higher level of dwelling growth at around 2.3% annually over the past decade.

TABLE 4.5 HISTORICAL OCCUPIED DWELLING GROWTH, BURWOOD STRUCTURE PLAN AREA, 2011–2021

	DWELLINGS (NO.)		
	2011	**2016**	**2021**
Burwood Structure Plan Area	1770	1940	2140
South East Region	580,600	625,100	672,900
Greater Melbourne	1,627,700	1,822,100	2,051,300
	ANNUAL CHANGE IN DWELLINGS (NO.)		
		2011-2016	**2016-2021**
Burwood Structure Plan Area		30	40
South East Region		8900	9560
Greater Melbourne		38,880	45,840
	ANNUAL GROWTH RATE IN DWELLINGS (%)		
		2011-2016	**2016-2021**
Burwood Structure Plan Area		1.9%	2.0%
South East Region		1.5%	1.5%
Greater Melbourne		2.3%	2.4%

Note: Excludes non-private dwellings and other private dwellings. Historical numbers rounded. Source: ABS Census of Population and Housing 2011, 2016 & 2021; AJM JV

4.3.2 DWELLING DENSITY

4.3.2.1 Comparison of dwelling density to benchmarks

As of 2021, the Burwood Structure Plan Area had a slightly lower proportion of low-density dwellings (57%) than Greater Melbourne (66%).

High-density living, including flats and apartments, accounted for the lowest share of dwelling density types within the Structure Plan Area (10%), compared to a higher 13% for Greater Melbourne. Medium-density dwellings, including townhouses and villas, were also fairly aligned across the three geographies.

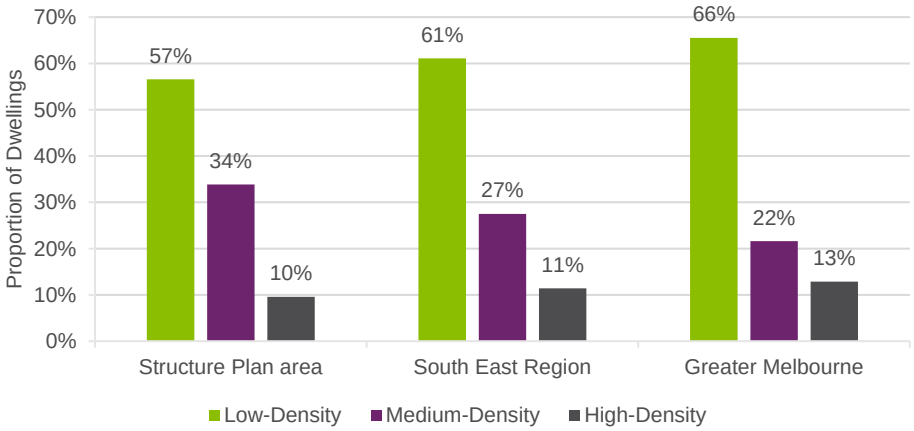


FIGURE 4.7 DWELLING DENSITY, BURWOOD COMPARED TO BENCHMARKS, 2021

Note: Excludes non-private dwellings and other private dwellings. Source: ABS (2021) STRD Dwelling Structure; AJM JV

4.3.2.2 Change in occupied dwelling density in the Structure Plan Area

Between 2011 and 2021, the number of low-density dwellings declined by 100, while the number of medium- and high-density dwellings increased by 310 and 170 respectively.

In recent years, there has been a trend of small subdivisions across Burwood. Large lots have been split into two, three, four or even more separately titled lots. Some dwellings are semi-detached (classified as medium-density) while some are detached, albeit smaller, dwellings.

From 2016 to 2021, on average 30 medium-density dwellings have been delivered per annum in net terms. Just 22 high-density dwellings net have been delivered per annum on average over the same period.

TABLE 4.6 CHANGE IN DWELLING DENSITY, BURWOOD STRUCTURE PLAN AREA, 2011-2021

	HISTORIC (NO.)			HISTORIC GROWTH PER ANNUM	
	2011	2016	2021	2011-2016	2016-2021
Low-density	1320	1250	1210	-10	-10
Medium-density	420	590	730	30	30
High-density	30	100	210	10	20
Total	**1770**	**1940**	**2140**	**30**	**40**

Note: Excludes non-private dwellings and other private dwellings. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: ABS Census 2011, 2016, 2021; AJM JV

4.3.2.3 Household type by dwelling density

Figure 4.8 shows household composition by dwelling density in the Burwood Structure Plan Area at the 2021 Census. Most low-density households are couple family households (with or without children). In high-density dwellings, there is a greater proportion of lone-person households. Across all dwelling density types, other family households and one parent family households only accounted for a small portion of the household types.

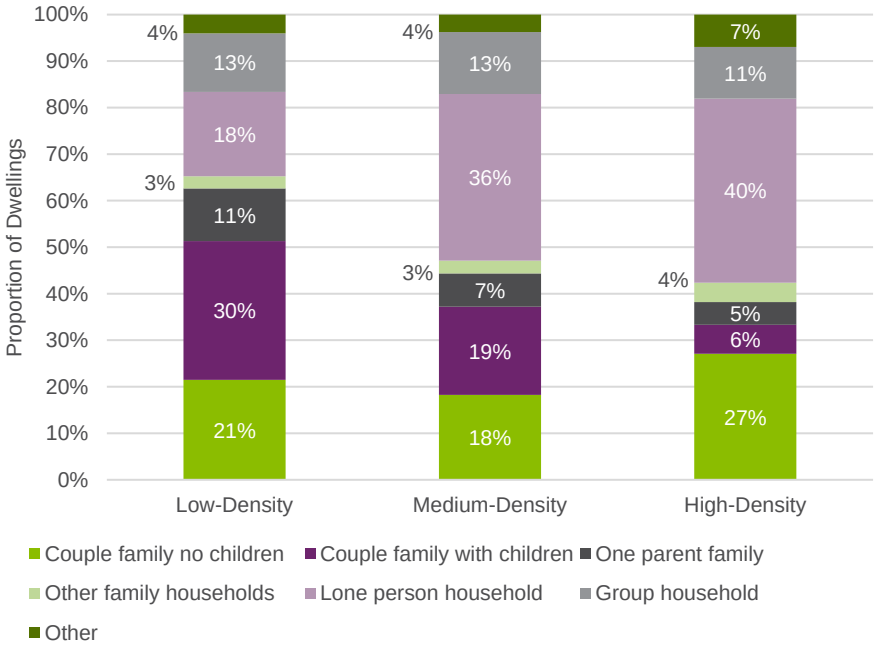


FIGURE 4.8 HOUSEHOLD COMPOSITION BY DWELLING DENSITY, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Excludes non-private dwellings and other private dwellings. Source: ABS (2021) STRD Dwelling Structure & HCFMD Family Household Composition (Dwelling); AJM JV

4.3.3 TENURE TYPE

4.3.3.1 Comparison of tenure type to benchmark

Figure 4.9 shows the tenure type in the Structure Plan Area, the South East Region, and Greater Melbourne. The Structure Plan Area has a high proportion of rented dwellings, accounting for 41% of total occupied dwellings (excluding other tenure), above the Greater Melbourne benchmark at 30%.

Increasing the density in the area is likely to result in an increasing share of renters.

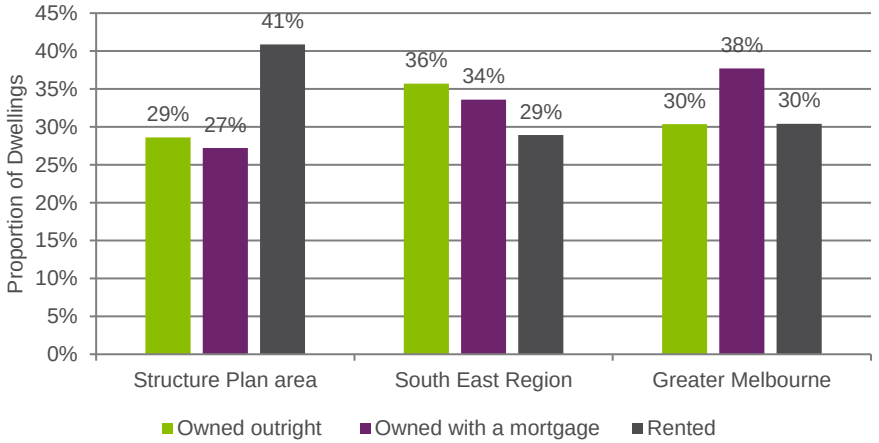


FIGURE 4.9 TENURE TYPE, BY GEOGRAPHY, 2021

Note: Excludes non-private dwellings and other private dwellings. Source: ABS (2021) TEND Tenure Type; AJM JV

4.3.3.2 Number of bedrooms per dwelling by density

Figure 4.10 shows the dwelling structures in the Structure Plan Area. Looking at the different dwelling densities, low-density in the Burwood Structure Plan Area are largely three bedrooms or more (91% of all low-density).

Medium-density dwellings in the Burwood Structure Plan Area are largely two or three-bedroom. Some 62% of medium-density dwellings have three bedrooms and 32% have two-bedrooms. High-density structures offer more one and two-bedroom opportunities (38% and 57%, respectively), but only 5% of high-density dwellings offer three-bedrooms or more.

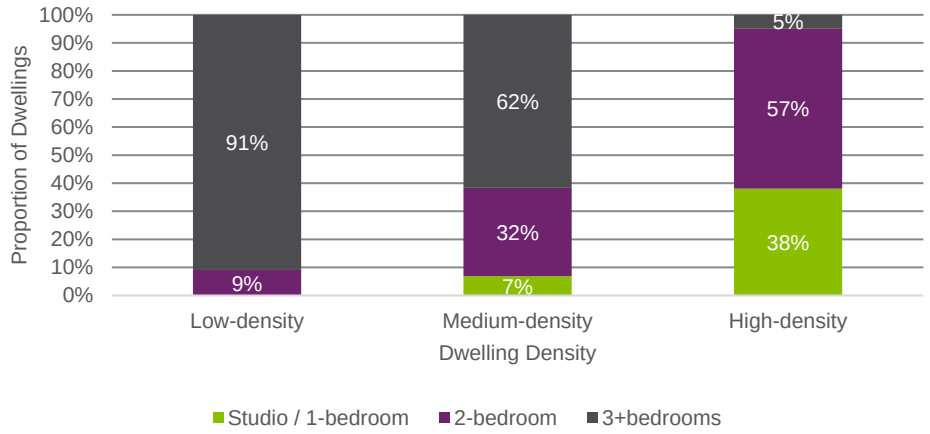


FIGURE 4.10 DWELLING STRUCTURE, BURWOOD STRUCTURE PLAN AREA, 2021

Note: Excludes non-private dwellings and other private dwellings. Source: ABS (2021) STRD Dwelling Structure & BEDRD Number of Bedrooms in Private Dwelling (ranges); AJM JV

4.3.3.3 Change by dwelling structure

Table 4.7 summarises the dwellings by dwelling structure in the Structure Plan Area from 2011 to 2021. Three-bedroom medium-density dwellings saw strong growth, equating to an increase of approximately 32 dwellings per year over the 10 years. Alongside this shift to medium-density, there has been increases in high-density dwellings with growth highest for the 2-bedroom high-density product of 22 dwellings per year.

The low growth in high-density three or more-3+bedroom dwellings is not aligned with the current family-oriented profile of the Structure Plan Area. Structure planning should seek to encourage more larger dwelling types across each density.

TABLE 4.7 DWELLINGS BY DWELLING STRUCTURE, BURWOOD STRUCTURE PLAN, 2011-2021

	HISTORIC (NO.)			HISTORIC GROWTH (PER ANNUM)	
	2011	2016	2021	2011-2016	2016-2021
Low-density					
Studio / 1-bedroom	10	10	0	0	0
2-bedroom	190	130	110	-10	-10
3+bedrooms	1120	1110	1100	0	0
Total	**1320**	**1250**	**1210**	**-10**	**-10**
Medium-density					
Studio / 1-bedroom	90	80	50	0	0
2-bedroom	180	220	230	10	0
3+bedrooms	150	290	450	20	30
Total	**420**	**590**	**730**	**30**	**30**
High-density					
Studio / 1-bedroom	10	50	80	10	10
2-bedroom	20	50	120	0	10
3+bedrooms	0	0	10	0	0
Total	30	100	210	10	20
Grand total	**1770**	**1940**	**2140**	**30**	**40**

Note: Excludes non-private dwellings and other private dwellings. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: ABS (2021) STRD Dwelling Structure & BEDRD Number of Bedrooms in Private Dwelling (ranges); AJM JV

4.3.4 HOUSING SUITABILITY

4.3.4.1 Housing suitability in the Structure Plan Area

Figure 4.11 shows the distribution for high, medium- and low-density dwellings based on the number of bedrooms identified in the 2021 Census as being surplus to the people living in the house, not enough, or the right amount. The chart has a line for each density, while the distance from the centre represents the proportion for that density recorded at each point of the radar.

A significant share of dwellings within the Burwood Structure Plan Area were the 'right size' for the occupants – in other words, there were no spare or needed bedrooms.

However, a greater number of dwellings were indicated to have one or even two bedrooms more than what was strictly necessary. High-density dwellings were largely right-sized or had one spare bedroom. Medium-density dwellings fell in the middle, and low-density dwellings were less right-sized.

Approximately 34% of low-density dwellings had one spare bedroom, with a further 32% having two spare bedrooms. That suggests there is an opportunity for some households to downsize from large houses into smaller dwelling formats or for those large houses to be replaced by several more 'right-sized' dwellings to house the future population more efficiently.

Only a small number of households were considered too small for the people living there. However, that does not imply that there is no need to increase the number of dwellings with more bedrooms to attract larger households that currently have more limited options, particularly in high-density dwellings.

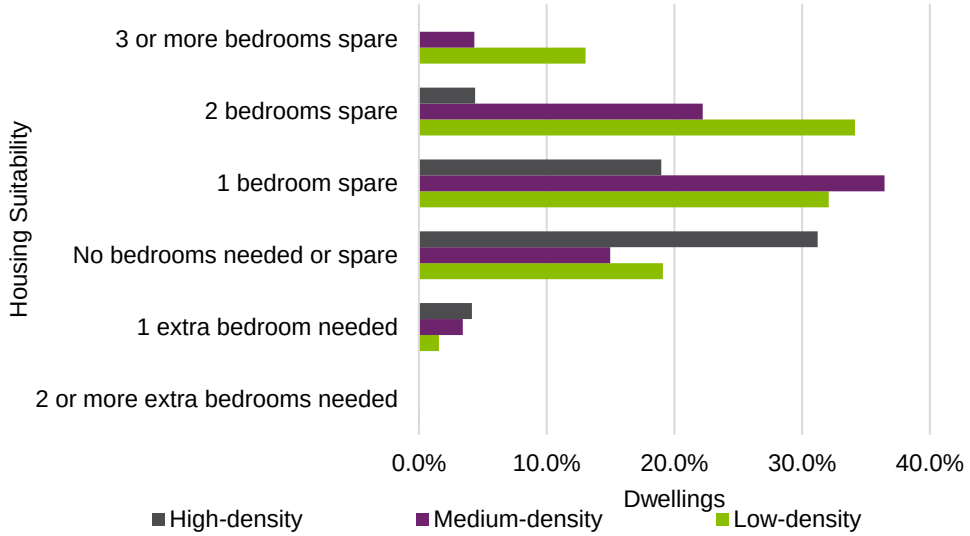


FIGURE 4.11 HOUSING SUITABILITY, BURWOOD STRUCTURE PLAN 2021

Note: Excludes not applicable responses. Source: ABS (2021) HOSD Housing Suitability, STRD; AJM JV

4.3.5 DIVERSE HOUSING TO ADDRESS THE VARIED NEEDS OF THE COMMUNITY

The current supply of diverse housing types providing tailored housing for specific cohorts is detailed here.

4.3.5.1 Social and Affordable Housing

Social and Affordable housing includes dwellings rented from a state or territory housing authority or a community housing provider.

Within the Burwood Structure Plan Area, there have only been no additional social or affordable housing dwellings from 2011 to 2021. However, this is in the context of the wider South East Region and Greater Melbourne, where there has been an overall decrease in social and affordable housing

TABLE 4.8 SOCIAL AND AFFORDABLE HOUSING, BURWOOD STRUCTURE PLAN AREA, 2011-2021

	HISTORICAL (NO. OF DWELLINGS)			HISTORICAL GROWTH (PER ANNUM)	
	2011	2016	2021	2011-2016	2016-2021
Structure Plan Area	82	73	81	2	-2
South East Region	12,000	12,000	12,000	0	0
Greater Melbourne	42,700	42,600	42,300	-24	-66

Note: Only includes dwellings that are rented from State or Territory Housing Authority and community housing providers. Source: ABS (2021, 2016, 2011) Census of Population and Housing; AJM JV

4.3.5.2 Student accommodation

There is a total of just under 1350 student accommodation beds in the Burwood Structure Plan Area, all positioned to service Deakin University.

TABLE 4.9 STUDENT ACCOMMODATION, BURWOOD STRUCTURE PLAN AREA, APRIL 2024

STUDENT ACCOMMODATION	BEDS
Deakin University MC Student Accommodation	577
Burwood Student Apartments	400
Burwood Student Village	200
308 Burwood Highway	45
224 Burwood Highway	39
58 Station Street Student Accommodation	31
1 Delany Ave	25
77 Elgar Road	15
216 Burwood Highway	14
Total	**1350**

Source: Urbis Student Accommodation Benchmarks

4.3.5.3 Retirement living and residential aged care

Retirement and Aged Care dwelling options located in the Burwood Structure Plan Area totalled just under 90 at the end of 2023. This consisted wholly of Independent Living Units.

Fountain Court Retirement Village Burwood is the largest retirement facility in the Structure Plan and is located on Station Street, Burwood. AVEO has a total of 67 units.

Uniting AgeWell's Nangare Independent Living Units is located at 1 Ireland Street Burwood and has a total of 20 units.

TABLE 4.10 RETIREMENT AND AGED CARE SUPPLY, BURWOOD, MAY 2024

TYPE OF ACCOMMODATION	STRUCTURE PLAN AREA	SOUTH EAST REGION
Retirement Units	87	13,300
Residential Aged Care Beds	0	10,100
Total	**87**	**23,400**

Source: Urbis Retirement and Aged Care Database (May 2023)

4.3.5.4 Diverse housing provision rates

In comparison to national or regional benchmarks, the current provision of diverse housing does not appear to align with the current population profile in the Burwood Structure Plan Area.

The analysis of provision rates for the examined diverse housing shown in Table 4.11. It highlights that:

- There is a significant supply of retirement living for the 670 people identified as being aged over 65 years in the Burwood Structure Plan Area in 2021 (ABS, 2021). There is one aged care bed available for every 7.7 people aged 65 plus. The comparable Australian provision rate of retirement and aged care facilities is 1 bed for every 19.6 people aged 65 plus. This is significantly lower than the provision rate in the Burwood Structure Plan Area.
- It should be noted that Burwood is a high amenity area where retirement living could be concentrated to serve the wider region. With a future station and anticipated amenity, it is reasonable to expect the Structure Plan Area will continue to have higher provision rates of Retirement and Aged Care going forward.
- There are over 1300 student accommodation beds in the Burwood Structure Plan Area. With 24% of the population reported to be tertiary students in 2021, this equates to 1240 tertiary students and a provision rate 1.1 beds per student. Every tertiary student could have a specialist student accommodation bed in the area. Comparing this to the Urbis benchmarks for the provision of student accommodation beds for full-time students in Suburban Melbourne, which equates to 1 bed per 11.4 students, a rate of 1 bed for every 0.9 (part and full-time) students is well over the benchmark. The location of Deakin University and the impact of COVID-19 on the results (i.e. student numbers at the time of the Census were likely low) should be considered when assessing the provision of student accommodation.
- The amount of social and affordable housing provided in the Burwood Structure Plan Area is slightly more than average, with a provision rate of 1 affordable dwelling per 66 people in the area. The provision rate in Greater Melbourne is 1 dwelling per 116 people. At a high level, this indicates a better than average provision, although it is important to consider the relative incomes of residents and the fact that affordable housing needs are not being met across Greater Melbourne at the current rate of provision. Further analysis of the need for affordable housing is provided later in Section 9.

TABLE 4.11 DIVERSE HOUSING PROVISION RATES

UNITS	LOCATION	DIVERSE HOUSING UNITS	POPULATION	PROVISION 1 UNIT PER:
Retirement and aged care beds and units and Aged Care Beds and Units	Burwood Structure Plan	90	670**	7.7 people aged 65+
	Australia	233,400	4,566,200**	19.6 people aged 65+
Purpose-Built Student Accommodation Beds	Burwood Structure Plan	1346	1240***	0.9 students
	Suburban Melbourne			11.4* students
Affordable housing dwellings	Burwood Structure Plan	80	5,340	66 people
	South East Region	12,000	1,600,100	133 people
	Greater Melbourne	42,300	4,917,600	116 people

** Full-time student provision only Urbis Benchmarks ** Population aged over 65 years, *** Tertiary Student population*

4.4 Implications for Burwood Structure Plan

The current and changing profile of the population and housing within the Burwood Structure Plan Area highlights the following areas the Structure Plan will need to consider:

- The Burwood Structure Plan Area has only seen moderate population and dwelling growth, in part influenced by the COVID-19 slow-down which impacted the number of students wanting to live near Deakin University.
- Key features of the Burwood Structure Plan population are influenced by proximity to the University:
  - » Below average household incomes
  - » A large cohort of young adults
  - » Decreasing people in the 65-plus years age group
  - » More group and lone-person households but fewer families
  - » Most households rent
  - » A large overseas-born population, particularly from China
  - » A large share of residents undertaking tertiary education.
- Around 79% of residents moved house between 2016 and 2021. These 'movers' were more predominately domestic (65% of the movers), with most domestic movers shifting from nearby areas. Still, a sizeable 35% of movers relocated from overseas.
- The delivery of new dwellings in Burwood has been moderate over the last decade. Of the new dwellings, 60% of new dwellings have been medium-density and 37% high-density. Most of these medium-density dwellings have three bedrooms, influenced by the development of two-storey townhouses.
- Going forward, medium-density is likely to remain the predominant form of new dwelling delivery in Burwood in the short term. However, as amenity increases, land prices rise, and land becomes more scarce, high-density is likely to increase in volume. This will likely support continued higher-than-average proportions of lone-person households but fewer families.
- The current housing offer is considered broadly "right-sized" for the households living within them, particularly the high-density space. The low- and medium-density housing typically has more bedrooms than needed. This presents opportunities for downsizing (e.g. older couples with no children left at home moving to smaller properties).
- In future, it is important to ensure high-density dwellings are suitable for all parts of the community. Medium- and high-density housing developed will need to continue to accommodate a wider range of households, more reflective of the Region and rest of Melbourne. Structure planning should consider ways in which housing diversity can be increased.
- The moderate-income levels of current residents and the high share of residents undertaking tertiary studies highlight the need to support the delivery of a diversity of housing, including tailored housing, such as affordable housing and student accommodation.

5. Housing costs and affordability

This section considers housing affordability in terms of the relationship between expenditure on housing (prices, mortgage payments or rents) and household incomes.

5.1 The cost of housing

Safe and affordable housing is essential to well-being. Affordability is important for people wanting to purchase housing or rent. This section considers the cost of renting or buying housing and compares it to the incomes of households paying the expected rents and mortgages.

Data relating to sales activity is presented for the suburbs within and surrounding the Structure Plan Area. This includes Ashwood, Mount Waverley, Burwood, Box Hill South, Glen Iris, Camberwell, and Surrey Hills. Burwood East, Ashburton, Blackburn South. Although Burwood is the focus, a wider area beyond the Structure Plan Area is considered for this analysis as investors, owner-occupiers and renters will consider areas surrounding their ideal location when deciding where to live. These suburbs, therefore, represent direct competition for dwellings, and their prices will influence prices in the Burwood Structure Plan Area.

Meanwhile, rental and vacancy data is provided for a more specific area that aligns to the Structure Plan area. The rental data primarily relies on the Department of Families, Fairness and Housing (DFFH) Rental Report, which typically aggregates multiple suburbs, making it difficult to separate them individually. The suburb of Burwood is included in the Burwood-Ashburton DFFH Rental Report area, which also encompasses the suburbs of Ashburton and Ashwood. Rental vacancy data is provided for postcode 3125.

For the purposes of this analysis, information is provided for ‘houses’ and ‘units’, with ‘units’ encompassing a mix of semi-detached dwellings, townhouses, and apartments.

5.1.1 PURCHASING A HOME

The median house price in Burwood has increased by 6% per annum between 2014 and 2023, to reach $1.49 million. This is 71% above the Greater Melbourne median house price. The median house price in Greater Melbourne has grown by 5.4% per annum over the same 7-year period (Figure 6.1).

The median price for units has also increased since 2016 at a higher rate of 4.0% per annum to reach $861,000. This is 40% above the Greater Melbourne median unit price. Unit prices in Greater Melbourne have grown by 4.5% per annum between 2014-2023. (Figure 5.1).

Over the year to December 2023, the median house price was significantly higher than the median unit price in Burwood and across many of the surrounding suburbs. In Burwood, the median house price was 73% higher than the median price of units in the suburb. Surrey Hills (2.8 times higher), Camberwell (2.8 times higher) and Glen Iris (3.3 times higher) had median house prices more than double median unit prices.

Houses are increasingly becoming out of reach of many renters and purchasers in Burwood and the surrounding suburbs. This is likely to result in increased demand for apartments or medium-density properties. The area has reached the pricing point where the differential between house and unit prices is wide enough to drive demand for units.

For many households, house prices are now out of reach in Burwood and surrounds. Therefore, potential residents coming to the area are anticipated to need to consider higher-density living. The absolute supply needs to increase as the population grows to limit pressure on property prices.

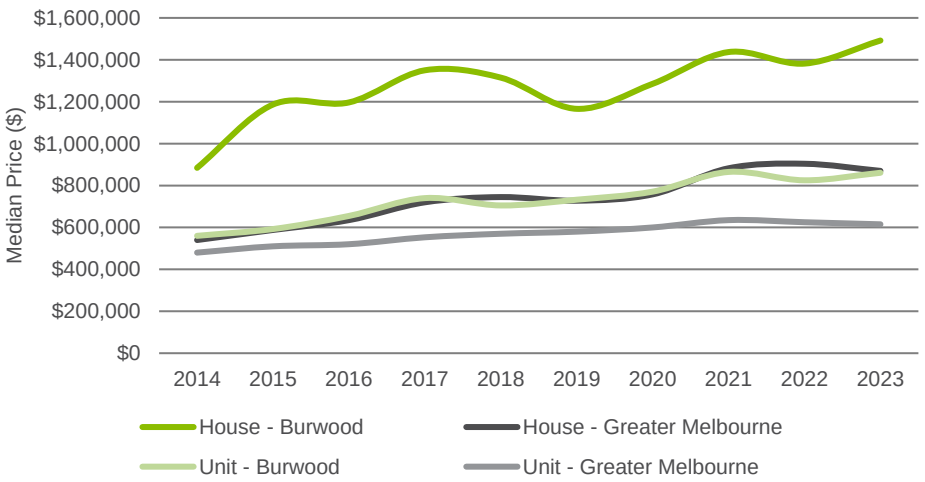


FIGURE 5.1 MEDIAN PRICE –BURWOOD COMPARED TO GREATER MELBOURNE, FEBRUARY 2016-DECEMBER 2023

Note: Only includes settled sales. Source: Pricefinder

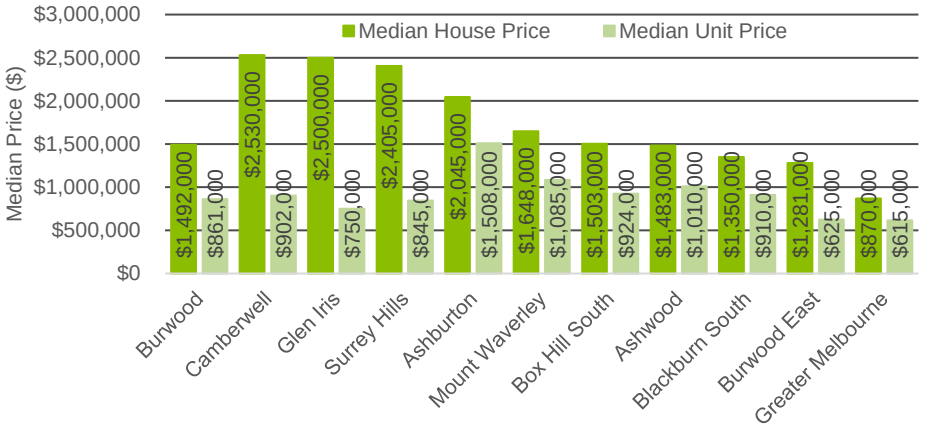


FIGURE 5.2 MEDIAN PRICE – BURWOOD AND SURROUNDING SUBURBS COMPARED TO GREATER MELBOURNE, YEAR TO DECEMBER 2023

Note: Only includes settled sales. Source: Pricefinder

TABLE 5.1 HOUSE MEDIAN PRICE AND GROWTH – BURWOOD AND SURROUNDING SUBURBS COMPARED TO GREATER MELBOURNE, YEAR TO DECEMBER 2023

SUBURB	HOUSE PRICE GROWTH			
	MEDIAN HOUSE PRICE	1 YEAR	3 YEAR P.A	10 YEAR P.A
Burwood	$1,492,000	8.0%	2.6%	6.0%
Camberwell	$2,530,000	-4.5%	3.3%	5.2%
Glen Iris	$2,500,000	0.0%	5.6%	6.1%
Surrey Hills	$2,405,000	3.0%	4.8%	6.0%
Ashburton	$2,045,000	3.0%	3.6%	6.3%
Mount Waverley	$1,648,000	7.7%	4.5%	6.3%
Box Hill South	$1,503,000	4.4%	3.3%	5.9%
Ashwood	$1,483,000	-6.7%	4.2%	6.1%
Blackburn South	$1,350,000	4.8%	5.0%	6.4%
Burwood East	$1,281,000	1.9%	5.0%	5.7%
Greater Melbourne	*$870,000*	*-3.8%*	*3.2%*	*5.4%*

Note: Only includes settled sales. Source: Pricefinder

TABLE 5.2 UNIT MEDIAN PRICE AND GROWTH – BURWOOD AND SURROUNDING SUBURBS COMPARED TO GREATER MELBOURNE, YEAR TO DECEMBER 2023

SUBURB	UNIT PRICE GROWTH			
	MEDIAN UNIT PRICE	1 YEAR	3 YEAR P.A	10 YEAR P.A
Burwood	$861,000	4.4%	4.1%	4.9%
Camberwell	$902,000	-6.4%	-0.5%	3.1%
Glen Iris	$750,000	2.7%	0.2%	3.4%
Surrey Hills	$845,000	0.6%	1.6%	3.5%
Ashburton	$1,508,000	35.2%	10.3%	10.0%
Mount Waverley	$1,085,000	2.4%	4.4%	5.3%
Box Hill South	$924,000	3.0%	4.9%	3.9%
Ashwood	$1,010,000	6.3%	2.6%	6.5%
Blackburn South	$910,000	1.1%	6.6%	5.0%
Burwood East	$625,000	-1.7%	2.2%	2.1%
Greater Melbourne	*$615,000*	*-1.6%*	*1.5%*	*2.8%*

Note: Only includes settled sales. Source: Pricefinder

5.1.2 COST OF RENTAL ACCOMMODATION

Figure 5.3 shows the median weekly rents for houses and units in Burwood-Ashburton compared with Greater Melbourne from 2011 to 2023.

Table 5.3 shows the median rental growth in Burwood-Ashburton over the year from December 2023.

The cost of house and unit rental has increased significantly following the COVID-19 pandemic. House rentals in Burwood-Ashburton grew 13% over the year to December 2023 to $632 per week. Unit rents increased by 16.3% to reach $436 per week.

For Greater Melbourne, there has been a similar trend in strong rental growth for houses and units. Over the year to December 2023, house rental growth was 10.9%, and unit rental growth was 19.8%.

Interestingly, unit rental growth was slightly higher in Greater Melbourne, while house rental growth was less pronounced compared to Burwood/Ashburton. This suggests stronger overall demand for units, primarily because they are concentrated in the inner city and high-amenity, high-demand areas. Houses remain the preferred dwelling type in the suburbs. House rents are 45% greater than unit rents in Burwood/Ashburton compared to 9% in Greater Melbourne.

The supply of a large number and diversity of housing stock in the Structure Plan Area will be required to ensure sustainable rental growth that maintains affordability.

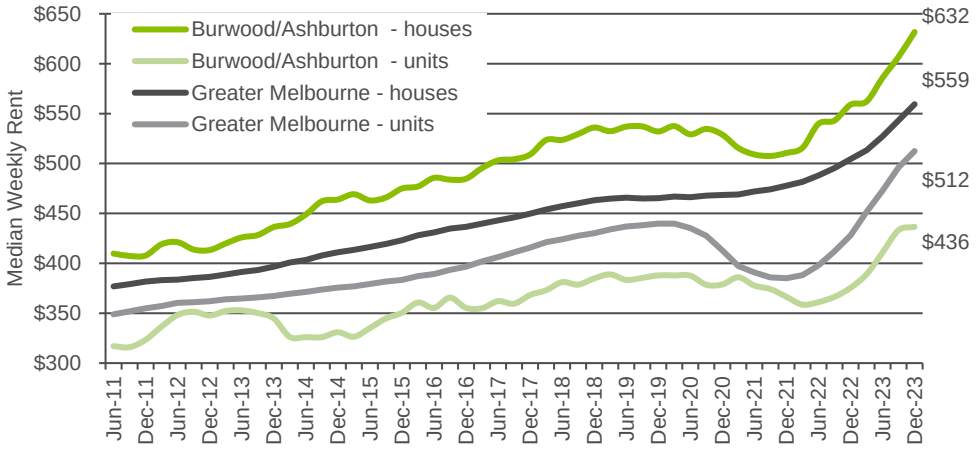


FIGURE 5.3 MEDIAN WEEKLY RENTS – HOUSES AND UNITS, BURWOOD AND GREATER MELBOURNE, 2011–2023

Note: Burwood/Ashburton data includes the suburbs of Burwood, Ashburton and Ashwood. Source: Department of Health and Human Services

TABLE 5.3 MEDIAN RENTAL GROWTH, BURWOOD COMPARED TO GREATER MELBOURNE, DECEMBER 2023

	HOUSE		UNIT	
	BURWOOD/ ASHBURTON	GREATER MELBOURNE	BURWOOD/ ASHBURTON	GREATER MELBOURNE
Median weekly rent (Dec 2023)	$632	$559	$436	$512
1 year	17.9%	10.9%	16.7%	19.8%
3 year p.a	4.1%	3.8%	4.1%	3.6%
10 year p.a	4.5%	3.8%	3.4%	3.5%

Note: Burwood/Ashburton data includes the suburbs of Burwood, Ashburton and Ashwood. Source: Department of Health and Human Services

5.1.3 VACANCY RATE

Figure 5.4 shows the average annual rental dwellings vacancy rate in Burwood (postcode 3125) compared with Greater Melbourne from 2005 to 2024.

Burwood has typically stayed well above the Greater Melbourne average, generally sitting between 4% and 7% between 2009 and 2020. Vacancy rates then trended upwards during the COVID period as international students left, reaching a peak of 11.8% in 2021. Since 2021, vacancy rates have dropped to around 1.9%, indicating a tight market.

Looking forward, the extended low vacancy rates in the relevant Burwood postcode highlights the lack of available supply relative to demand. With strong population growth expected in the Burwood Structure Plan Area, there will be a need for it to support the delivery of a significant increase in the number of dwellings so that supply keeps pace with demand. The scale of dwelling increase needed is discussed in later sections of this report.

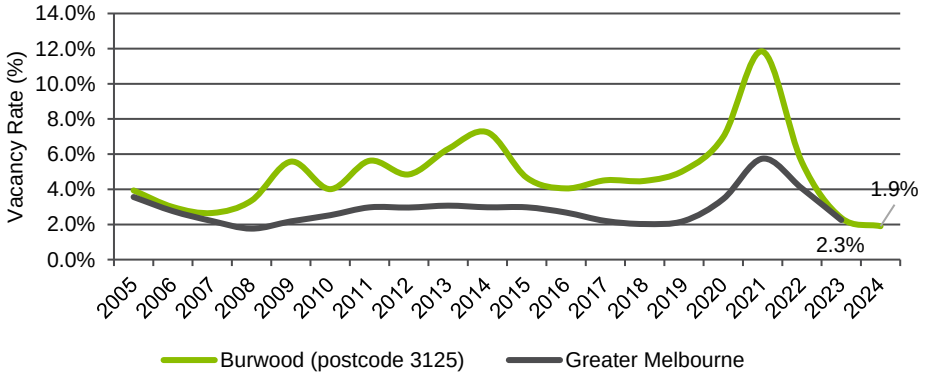


FIGURE 5.4 AVERAGE ANNUAL RENTAL DWELLING VACANCY RATE, BURWOOD AND GREATER MELBOURNE, 2005– 2024

Note: For this analysis to estimate Burwood the postcode of 3125 was used. Annual except 2024, which represents the March quarter. Source: SQM Research; REIA

5.2 Housing affordability

Assessing housing affordability is not straightforward. Various factors influence a household's financial status, the overall market demand for housing and housing tenure (whether one is seeking to rent, is renting, is looking to buy, or is already a homeowner with or without a mortgage), as noted by the Senate Standing Committees on Economics in 2015[31].

The simplest measure of housing affordability compares housing costs to gross household income, where housing stress is defined as households spending over 30% of their income on housing costs.

However, this overlooks the possibility that that high-income households may choose to spend more than 30% of their household income on housing, and their higher income means they have sufficient income after housing costs to avoid financial stress.

In contrast, low-income households (within the bottom 40% of the household income distribution) are more susceptible to financial hardships resulting from significant life events or shifts in the housing market.

Hence, this sub-section examines housing stress among low-income households. Table 5.4 compares housing affordability for households in the Structure Plan Area to the Greater Melbourne average.

In the Burwood Structure Plan Area, households under mortgage stress (i.e. low-income households paying more than 30% of income on mortgage payments) are at a similar proportion as Greater Melbourne. However, there is a higher proportion of households in rental stress in the Burwood Structure Plan Area compared to Greater Melbourne. This is in part due to the slightly higher share of low income households, but also due to more of those low-income households being in stress.

Having 17% of households in the Structure Plan Area under a degree of housing stress is a significant risk of financial hardship to numerous families in the area.

While interest rates are likely to have stabilised and rental and house price growth is slowing, income growth is also slowing. This is likely to result in the continuation of a degree of mortgage and rental stress within many locations in the South East, including the Burwood area, over the short- to medium-term.

Therefore, there is a role for the Structure Plan Area to ensure the delivery of a significant number of dwellings to help curtail price growth and encourage a diversity of housing that meets a wider range of price points. Higher-density housing has a role to play more generally in this regard.

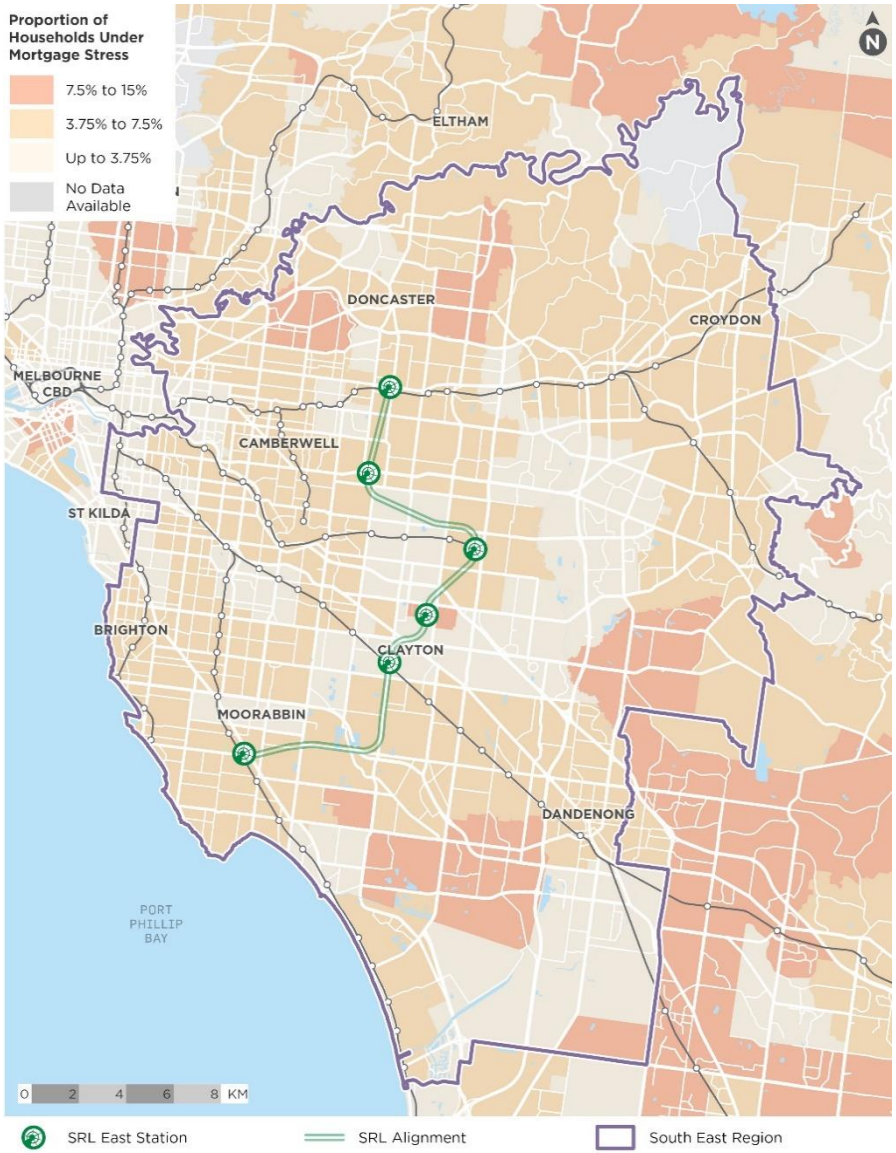
TABLE 5.4 PROPORTION OF ALL HOUSEHOLDS IN MORTGAGE AND RENTAL STRESS, BURWOOD STRUCTURE PLAN AREA AND GREATER MELBOURNE, 2021

	STRUCTURE PLAN AREA	GREATER MELBOURNE
Low-income households as a share of all households	46%	40%
Share of all households in rental stress (low income and rent >30% of income)	13%	9%
Share of all households in mortgage stress (low income and mortgage payments >30% of income)	4%	4%
Share of all households in housing stress	**17%**	**13%**

Note: Percentages are calculated as a portion of total households in the locations. Source: ABS; AJM JV

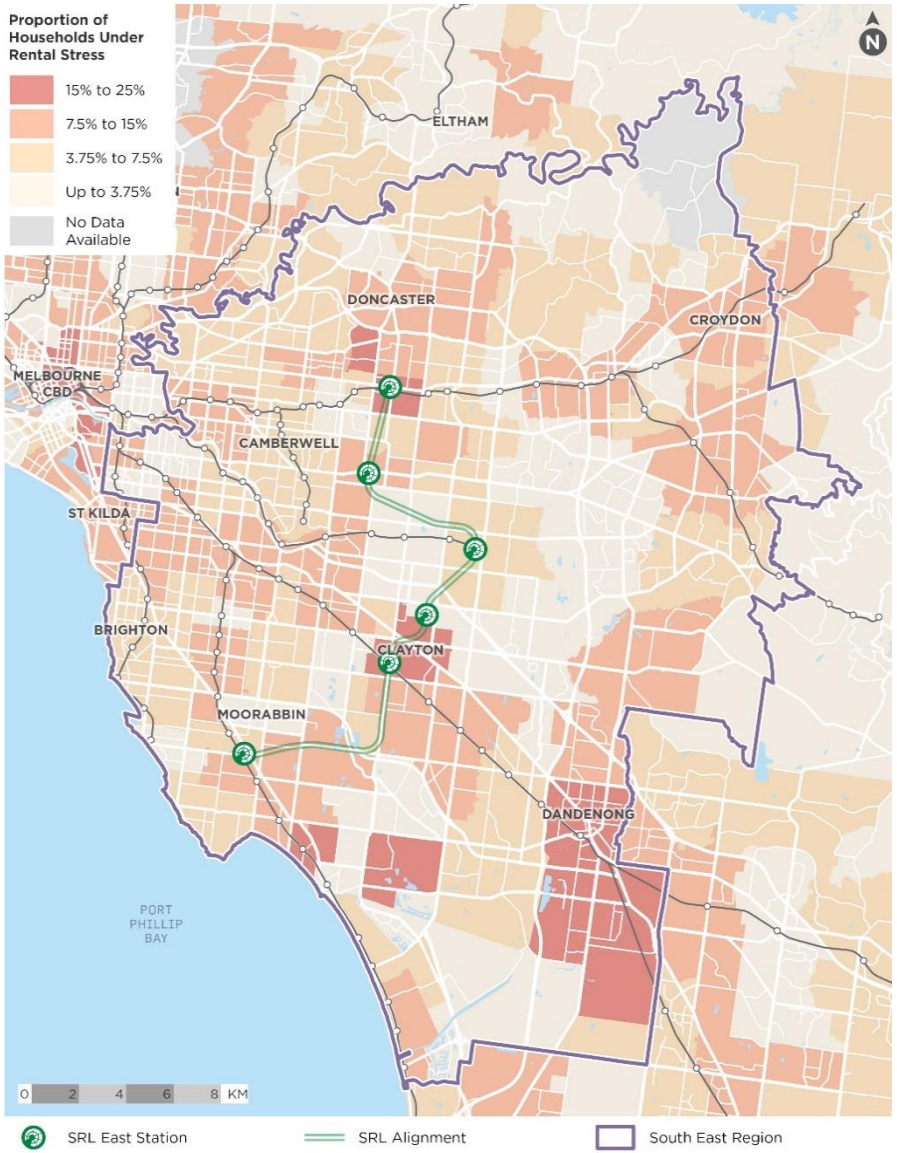
Figure 5.5 and Figure 5.6 on the next page show how housing stress differs by location and among housing tenure types (e.g. homeowners with a mortgage and renters) at suburb level across Melbourne. The maps show the share of total households in housing stress.

[31] Senate Standing Committees on Economics (2015), Out of reach? The Australian housing affordability challenge (aph.gov.au), May 2015



Source: ABS (2021) MAID Mortgage Affordability Indicator; AJM JV

FIGURE 5.5 PROPORTION OF HOUSEHOLDS IN MORTGAGE STRESS BY SUBURB, 2021



Source: ABS (2021) RAID Rent Affordability Indicator; AJM JV

FIGURE 5.6 PROPORTION OF HOUSEHOLDS IN RENTAL STRESS BY SUBURB, 2021

5.3 Implications for Burwood Structure Plan

The analysis of housing costs and affordability in the Burwood Structure Plan Area highlights the following affordability challenges and opportunities for the Structure Plan to address:

- Houses and units in Burwood and surrounding suburbs are generally priced well above the Greater Melbourne median, making it unaffordable for many residents.
- Rents for units remain more affordable than houses, but growth has been stronger more recently, resulting in the gap closing.
- As household rental and mortgage stress is significantly higher relative to Greater Melbourne, dedicated affordable housing supply should be considered to support those on very low and low incomes to manage housing stress.
- The delivery of more affordable purchaser products for moderate income residents is important to manage upward pressure on prices and rentals. Apartments are likely important in achieving this.
- The delivery of more diverse housing product will provide increased opportunities for low to moderate incomes to purchase or rent more affordable dwellings, as well as for a broad range of demographic groups (e.g. renters and buyers, lower and higher income, different family types).
- New apartment development within the Burwood Structure Plan has typically been mid-rise developments concentrated along the Burwood Highway. Facilitating more low-to-mid-rise units throughout the Structure Plan Area will help deliver greater housing choices and help with affordability.

6. Housing delivery trends in the Structure Plan Area

The following sub-section looks at housing development trends in the Burwood Structure Plan Area, including new dwelling approvals and recent completions.

6.1 New dwelling approvals

Figure 6.1 charts ABS new dwelling approvals by dwelling type for the Burwood Structure Plan Area.

Since 2017, an average of over 70 new dwellings have been approved each year throughout the Burwood Structure Plan Area. Most new dwelling approvals have been for “other residential dwellings” (i.e. not houses), accounting for 80% of all residential approvals since 2017.

There was a significant decline in dwelling approvals from the high in 2019 to only 23 approvals in 2021. Approvals have since picked up slightly to a total of 60 approvals in 2023. The future pipeline suggests dwelling approvals will continue to rise with several new developments on the horizon.

FIGURE 6.1 NEW DWELLING APPROVALS BY TYPE, BURWOOD STRUCTURE PLAN AREA, 2016/17-2022/23

Note: Other Residential includes apartments, semi-detached dwellings, and townhouses. Source: AJM JV; ABS

6.2 Private dwelling future supply

Figure 6.2 and Figure 6.3 outline the supply pipeline by approval stage and estimated completion data respectively.

The breakdown of new apartments and townhouses in the proposed pipeline is sourced from Cordell Connect, which records all multi-dwelling proposals including those in early planning, in applications with councils, approved permits and under construction. This shows units/apartments are expected to account for 36% of new dwellings or 170 dwellings in the Burwood Structure Plan Area over the short to medium term.

Not all of the 470 dwellings in the pipeline are likely to be constructed in the short to medium term, with most in the approval stage. There are currently a significant number of apartments (135) in the approval stage. Townhouses in the approval stage account for the 128 new dwellings. Other residential includes student accommodation, with most of the 193 units in the approval stage being from a new approved student accommodation building at 254 Burwood Highway, Burwood.

We note that data from Cordell Connect does not include single-dwelling proposals. Therefore, there is likely to be a small number of single dwellings that are anticipated to be a minor share of housing development. Single dwellings are likely to only replace existing houses, and therefore, the net change, as has been seen over the last decade in the Structure Plan Area, will be minimal.

New supply is expected to be completed in most years over the next four years based on the current pipeline.

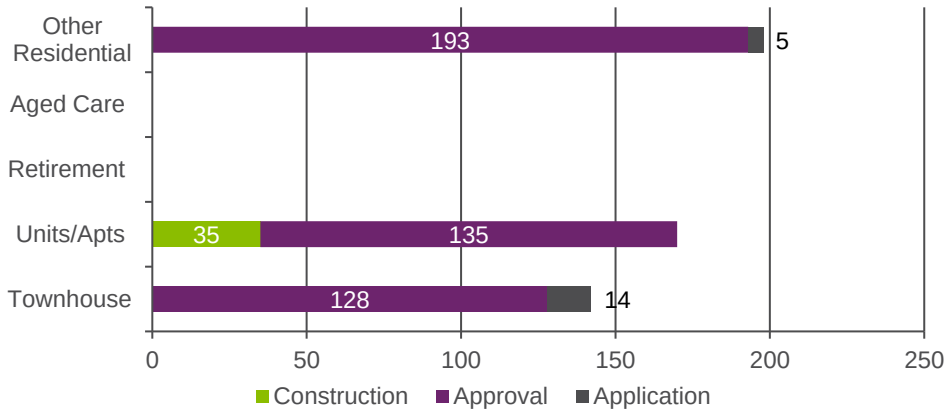


FIGURE 6.2 NEW DWELLINGS SUPPLY BY STATUS, BURWOOD STRUCTURE PLAN AREA 2024-2028

Note: Student Accommodation is included in Other Residential. This data represents development projects currently in the planning application, planning approval or construction stage. Source: Cordell Connect (May 2024)

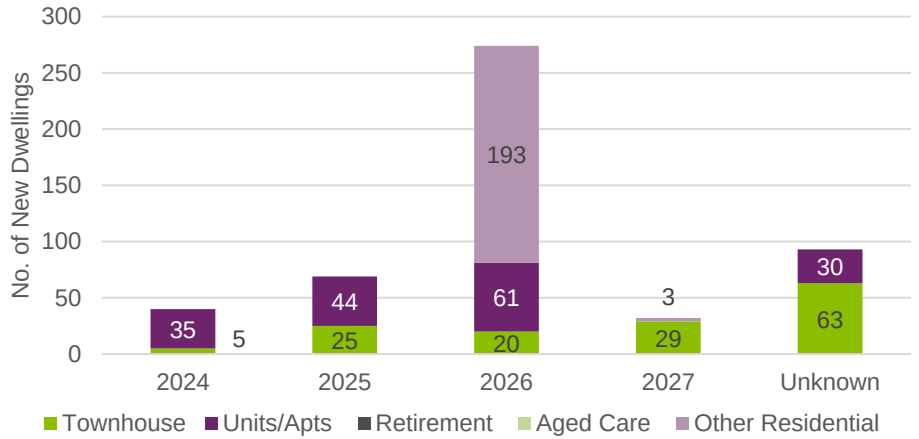


FIGURE 6.3 NEW DWELLINGS SUPPLY BY COMPLETION DATE, BURWOOD STRUCTURE PLAN AREA, 2024-2028

Note: Student Accommodation is included in Other Residential. Source: Cordell Connect (May 2024)

6.3 Recent and proposed development

Recent and proposed housing developments in the Burwood Structure Plan Area are mainly townhouse developments, with only a few subdivisions and mixed-use medium or low-rise apartment developments in the pipeline.

These projects and several others developed in recent years demonstrate the market is largely focused on medium-density, with some high-density (but still mid-rise) apartment buildings along Burwood Highway.

Table 6.1 profiles key higher-density projects delivered and proposed within the Structure Plan Area.

TABLE 6.1 RECENT AND PROPOSED RESIDENTIAL DEVELOPMENTS, BURWOOD STRUCTURE PLAN AREA

MCINTYRE APARTMENTS **47 MCINTYRE STREET, BURWOOD** 	• Proposed development of 35 residential apartments including penthouses with one- two- and three-bedrooms. Focus on sustainable design with rainwater harvesting for toilets and irrigation, high performance glazing and energy saving lights in common areas and service areas controlled with occupancy and daylight sensors. • The site is close to the future SRL East station • Development stage: Construction • Expected completion: Mid-2024 • Project value: $12 million.
CORNUS BURWOOD **137-139 BURWOOD HIGHWAY, BURWOOD** 	• This project includes 40 mid-rise apartments in a five-storey building comprising one, two and three bedrooms, associated car parking and landscaping. • Development stage: Completed (2020).
268 BURWOOD HIGHWAY, BURWOOD 	• Proposed construction of a 6-storey mixed-use building comprising 61 apartments and three retail premises. • Located towards the eastern edge of the Structure Plan Area along the Burwood Highway corridor • Development stage: Development Approval (Due 2026) • Project value: $5.5 million.
ALTUS APARTMENT BUILDING, 260 BURWOOD HIGHWAY, BURWOOD 	• Construction of a part 4 and part 5 storey apartment building consisting of 43 apartments over ground floor car parking • This is a medium-rise development located on Burwood Highway, near Deakin University • The project value was estimated to be $15 million • Development stage: Completed (2022).
BURWOOD BRICKWORKS **60-78 MIDDLEBOROUGH RD, BURWOOD EAST** 	• Burwood Brickworks is a master planned community comprising approximately 700 dwellings, open space, community facilities and the Burwood Brickworks Shopping Centre. • The former Burwood Brickworks site is located just outside the Structure Plan Area • The project includes a total of 450 apartments, 240 townhouses and 16 land lots • Development stage: Complete (2023).

Source: Cordell Connect; AJM JV

Figure 6.4 maps the location and scale of apartment development projects, completed since 2014, or now under construction or approved. This shows the limited number of projects and the fact they have only been delivered along the Highway to date.

FIGURE 6.4 STATUS OF PROJECTS RECEIVING APPROVAL 2014-2024, BURWOOD STRUCTURE PLAN AREA

Note: Includes apartment developments with 25 apartments or more. Source: Urbis Apartment Essentials

6.4 Historical apartment sales

In addition to the quantum and density of housing being delivered in the Structure Plan Area, it is important to understand the typical size and nature of those dwellings. Figure 6.5 outlines data analysed from *Urbis Apartment Essentials*, which records details of off-the-plan apartment sales. Within the Burwood Structure Plan the data shows that:

- Overall, off-the-plan apartment sales were minimal from 2018 to 2023, with a peak of only 36 sales in 2021. There was only one sale recorded in both 2022 and 2023.
- Two-bedroom apartments were the most common apartment type from 2018 to 2023 accounting for 78% of new apartment sales in that time period.
- Three-bedroom apartments have increased in popularity, rising from 1 sale in 2018, to 11 in 2021.
- The median apartment size peaked in 2021 at 100 sq.m due to the spike in three-bedroom sales. Except for 2021 and 2023 where there was a sole one-bedroom sale, the median size was consistently around 70-80 sq.m for an apartment.

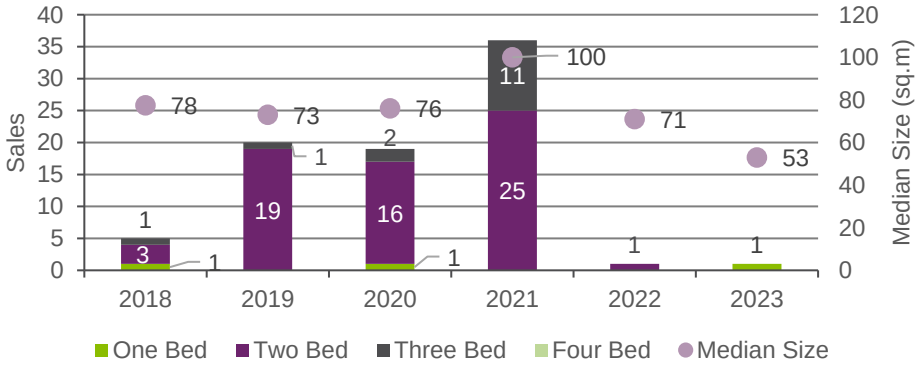


FIGURE 6.5 HISTORICAL APARTMENT SALES AND MEDIAN SIZE (SQ.M)

Source: Urbis Apartment Essentials Note The housing requirements modelling presented in section 8 uses internal area benchmarks to estimate total residential floorspace. Benchmarks used are not the same as those above and are based on internal area benchmarks for all of suburban Melbourne.

6.5 Future supply of housing to meet diverse community needs

6.5.1 AFFORDABLE, SOCIAL AND KEY WORKER HOUSING

According to Cordell Connect, in terms of planned affordable, social and key worker housing in the Burwood Structure Plan Area, no projects were identified as containing social and affordable housing. It should be noted that other projects will likely include an element of affordable housing, although this is not explicitly recorded in the Cordell Connect database.

It is difficult to determine the future supply pipeline for key worker housing as there is significant overlap between social and affordable housing (as key workers can be accommodated in these housing types).

6.5.2 STUDENT ACCOMMODATION

Table 6.2 shows student accommodation in the Burwood Structure Plan Area in 2024. A total 193 student accommodation beds are in the supply pipeline in the Burwood Structure Plan Area and located to service Deakin University.

TABLE 6.2 STUDENT ACCOMMODATION, MONASH STRUCTURE PLAN AREA, APRIL 2024

STUDENT ACCOMMODATION	BEDS
250 Burwood Highway	36
254 Burwood Highway Student Accommodation	157
Total	**193**

Source: Urbis Student Accommodation Database

6.5.3 RETIREMENT LIVING AND RESIDENTIAL AGED CARE

There is no future supply planned for the Burwood Structure Plan Area in the current pipeline. However, across the South East Region, there is proposed supply of a further 2400 Independent Living Units and over 3400 Residential Aged Care beds.

TABLE 6.3 RETIREMENT AND AGED CARE FUTURE SUPPLY PIPELINE

TYPE OF ACCOMMODATION	STRUCTURE PLAN AREA	SOUTH EAST REGION
Retirement Units	0	2400
Residential Aged Care Beds	0	3400
Total Yield	**0**	**5800**

Source: Urbis Retirement and Aged Care Database

6.6 Implications for Burwood Structure Plan

The analysis in this section highlights the following considerations for the Burwood Structure Plan Area:

- The pipeline of dwelling proposals, particularly apartments, is low. Structure planning should encourage increased density to support future population growth and housing diversity.
- Some mid-sized projects recently delivered and proposed indicate the market is starting to deliver some level of greater density in the Structure Plan Area.
- Most of this development is concentrated along Burwood Highway. Structure planning could support and encourage further development across a wider area to reduce the reliance on one area to improve the diversity of housing options.
- Recent and proposed developments continue to offer predominantly larger-sized townhouses and two-bedroom apartments. A greater diversity of stock is needed to support a more diverse demographic.
- There is a limited pipeline of tailored accommodation for specific groups such as social and affordable housing, key worker housing or aged care/retirement living. While developers will respond to demand for some of those housing needs, intervention is likely necessary in others, particularly the provision of social and affordable housing. New student housing is however, proposed.

Part C: Future housing need

Part C includes:

- **Section 7** summarises the methodology used for modelling future housing requirements in the Structure Plan Area.
- **Section 8** forecasts population growth housing demand in the Structure Plan Area.
- **Section 9** assesses future demand for housing tailored to specific community needs including social, affordable and key worker housing, as well as student accommodation and aged care and retirement living.

7. Housing demand methodology

This section summarises the methodology and modelling used to assess the amount and structure of housing required to support the projected population growth in the Structure Plan Area. Structure refers to the density (high, medium, low) and bedroom number of a dwelling.

7.1 Methodology

The housing requirements methodology uses modelling of population projections for the Structure Plan Area to estimate the residential dwellings and residential floorspace required to accommodate that population.

The modelling uses 2021 Census data to determine the existing number of dwellings in 2021 and population projections derived from the SRL Business and Investment Case to forecast out to 2041. These projections are described in Appendix E.

It is important to note that since the population projections include all long-term residents, the housing requirements assessment allocates all long-term residents to a dwelling structure (i.e., high / medium / low-density by bedroom number).

Note the dwellings and floorspace modelled are general and do not imply that a specific form of accommodation is required. For example, the amount of high-density two-bedroom units required could be provided as standard residential apartments or a type of diverse accommodation such as student accommodation. Similarly, the number of low-density units could be satisfied by standard low-density housing or partially through retirement villages. While the specific form of accommodation (i.e., standard residential, retirement, key worker housing etc) depends upon many factors, the dwelling structure numbers modelled (i.e., proportion of 1 bedroom high-density required) will be similar across specific accommodation types.

The dwellings (and floor space) are also ‘sector blind’ which means they could represent private or government-provided accommodation.

Lastly the 2021 dwelling numbers include all private dwellings, including those occupied and unoccupied. The 2041 dwelling estimates are calculated to accommodate the projected population, with a factor added to account for vacant stock making them directly comparable to the 2021 dwelling estimates. The 2041 dwelling estimates are calculated from population estimates and do not initially include vacant stock. Therefore, a vacancy factor is incorporated to account for vacant stock that is important to a functioning residential market.

Figure 7.1 shows details of the methodology for assessing housing requirements, which is explained more below and in Appendix E. The lettering corresponds with the full explanation provided in the Appendix.

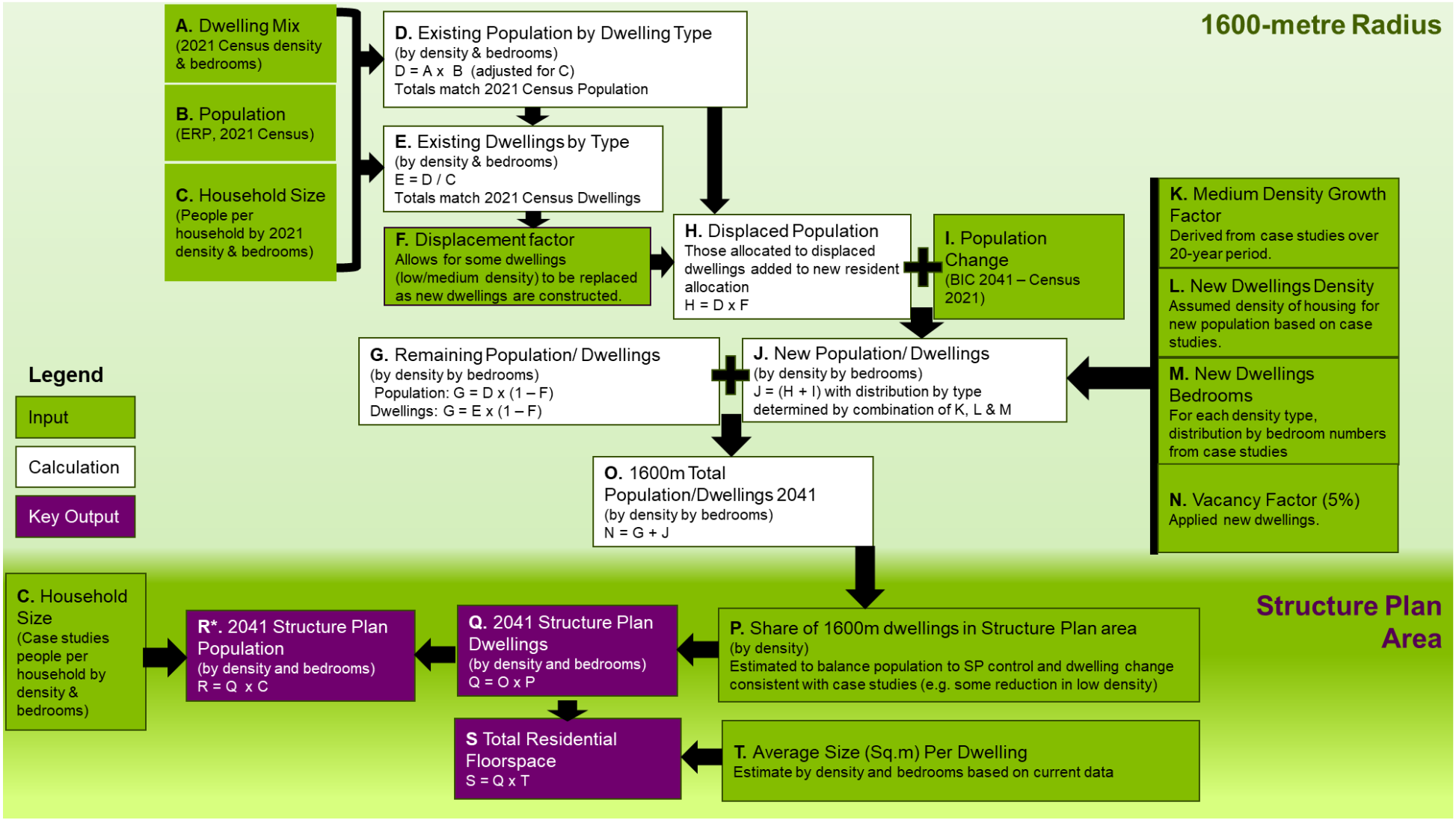


FIGURE 7.1 HIGH-LEVEL METHODOLOGY FOR ASSESSING HOUSING DEMAND

Source: AJM JV

7.1.1 DRAWING ON HOUSING DEVELOPMENT TRENDS IN CASE STUDY AREAS

The evolution of prominent transportation hubs in Australia over the past two decades offers valuable insights into the SRL East Structure Plan Areas and serves as a basis for understanding the housing requirements of transit-oriented precincts (TOPs). Areas with both new and established train stations have typically seen an increase in housing density, with medium- and high-density residences becoming more prevalent in numerous precincts.

The dynamics of these precincts was explored for this assessment, with in-depth analyses of several case study precincts, with the results used as an evidence base for the housing requirements modelling for the Structure Plan Area. The case studies are primarily used to inform the likely mix of housing that will emerge.

At a high level, the model is balancing between the old (the existing dwelling mix) and the new (evidence from chosen TOPs) to deliver a realistic outcome for the Structure Plan Area. This accounts for the fact that while some existing dwellings will be replaced by new construction, a large share of the existing housing will still be in place in 2041 (the period of assessment).

Rather than relying on arbitrary estimations of equivalent 'structure plan' boundaries in the case study areas, a radius of 1600 metres from each case study train station (or equivalent) was used. This method maintains consistency in benchmarking across all precincts.

For each Structure Plan Area, the three most comparable case studies were chosen, considering factors such as population density, demographics of residents, proximity to hospitals or universities where relevant, and distance from the CBD. The case studies are selected using a ‘similarity search score’ that ranks the locations relative to the subject SRL location for each of the factors.

Case studies were selected from Sydney, Brisbane and Canberra. Melbourne examples were considered but ultimately not included for a few reasons.

Firstly, the case study approach requires consideration of a period of 20 years of housing growth from 2001 to 2021, to compare to the 20 years for assessment of the SRL East Structure Plan Areas from 2021 to 2041. In Melbourne, there are few examples of suburban locations that experienced significant high density residential development in the 20 years prior to 2021 comparable to what may be experienced around the SRL stations to 2041. With the possible exception of Box Hill, the suburbs in Melbourne where growth has been observed are largely inner suburbs such as Richmond, South Yarra or Footscray. Distance from the CBD is a factor in the case study selection process which reduced the relevance of inner city locations.

Due to a combination of different levels of amenity, context, market activity, and demographics among other reasons, these locations are seen as not being appropriate to draw conclusions for the middle suburban SRL locations. Consequently, most of the case studies which rate as most similar to the SRL situation are middle suburban locations in Sydney. Sydney is more advanced in its delivery of density beyond the central areas, with more evidence of change over the last 20 years.

Secondly, each urban precinct is unique, fulfilling a specific role within a city. For example, the unique characteristics that Parramatta brings to Sydney (secondary CBD and office market, providing a hub for the outer western suburbs) mean that few if any other precinct within Sydney can fulfill this role. Case studies in Melbourne were not selected as they would be serving distinct roles to the subject SRL precinct. Considering the housing requirement projections are somewhat sensitive to the case studies selected, a weighted average approach was utilised to minimise this sensitivity and to ensure the Structure Plan Area is being compared to a wider variety of urban precincts.

Considering the housing requirement projections are somewhat sensitive to the case studies selected, a weighted average approach was utilised to minimise this sensitivity and to ensure the Structure Plan Area is being compared to a wider variety of urban precincts.

It should also be noted that the selection of case studies, although providing important data points to consider the likely change in the areas around the SRL stations (e.g. share of dwellings by density and bedroom numbers, change in growth of low/medium density dwellings, average household size), are not entirely determinative of the results. Other case studies could reasonably be selected in each situation, but with the weightings applied and the data being used as a reference only, the final results would not differ greatly. The key determinant of the housing need is the population forecast in each Structure Plan (which in turn

broadly determines the number of dwellings), with the case studies helping to inform the housing mix required for that given population.

The case study analysis offers insights into the potential housing landscape within the 1600-metre radius of the SRL station. However, it is important to note that the Structure Plan Area is smaller, so to derive estimates for it the estimated 1600-metre housing mix (by dwelling density and bedroom number) needed to be allocated to the Structure Plan Area. This considers the current distribution and likely change in low-, medium-, and high-density dwellings in the Structure Plan Area.

The results of the case study selection process for the Structure Plan Area are shown below in Section 7.2, with more detail on the methodology provided in Appendix D.

7.1.2 DERIVING ESTIMATES FOR THE STRUCTURE PLAN AREA

Once case studies were selected, the methodology for determining the number and structure of dwellings and associated residential floor space needed to support the projected population in the Structure Plan Area was modelled using insights from the case studies.

The methodology is outlined briefly below, with a more comprehensive description provided in Appendices D and E. Note that steps 1 to 4 are completed for a 1600-metre radius from the SRL station, whereas steps 5 and 6 are for the Structure Plan Area. Also note the methodology below explains how estimates of the 2041 housing requirements are attained. Estimates for existing dwellings in 2021 are based on 2021 census data.

1) For the **population residing in existing dwellings**, all key housing estimates are sourced from the 2021 Census for a 1600-metre radius from the SRL station at Burwood. This data is used to allocate the 2021 population into dwelling types based on density (high / medium / low) and by number of bedrooms for each density.

2) Recognising that some of the future (2041) dwellings will be those that exist now, **the future population living in existing and new dwellings is analysed. This requires using a 'displacement factor'**, which reflects the share of existing dwellings that will be removed to allow the construction of new dwellings. The number of displaced dwellings is outlined in Appendix E.

3) The displaced population is added to the change in projected population to produce the **total population needing to be accommodated in new dwellings.** The dwelling requirements for this population are derived from a series of inputs derived from the case studies, including the proportion of residents by the density and bedroom number of their dwelling.

4) The population in new dwellings is added to the population in remaining existing dwellings **to calculate the total population in the 1600-metre radius from the SRL station and dwelling (by type) estimates for 2041**. The dwelling estimates include a vacancy allowance (+5%), noting there will be additional dwellings on top of those accommodating the projected population that are vacant at a point in time. These results are cross-checked against the growth in dwelling structure in the case studies.

5) **Dwellings in the 1600-metre radius area is distributed to the Structure Plan Area.** This distribution is achieved by applying proportions based on the typology mix seen in the selected case studies which represents what is achievable for dense urban precincts. The distribution also considers what is feasible given the existing dwelling stock, as there is a limit on how much housing can be displaced before 2041. It is ensured that the derived result from the above matches the forecast population for the Structure Plan Area by adjusting these proportions (and the household sizes).

6) By applying household size to dwellings (people per household derived from the case study estimates), average internal area (sq.m) and Gross Building Area (GBA) **the total dwelling numbers by dwelling structure can be estimated, as well as population by dwelling structure, and total residential floorspace needed in the Structure Plan Area.**

7.1.3 PEER REVIEW

This technical report has been independently peer reviewed by Julian Szfraniec of SGS. The peer review report is attached as Appendix G of this report, which sets out the peer reviewer's opinion on the Housing Needs Assessment.

7.2 Selected case studies for Burwood

This sub-section outlines the selection of the case studies referenced in Section 7.1. Based on a similarity search and ranking exercise of urban precincts outside inner-city areas in Australia, the case studies were used to derive key housing parameters for the 1600-metre radius area from the SRL East station at Burwood:

- Epping (NSW) – weight of 0.5
- Lidcombe – weight of 0.3
- Kelvin Grove – weight of 0.2.

The case studies have some of the most similar population densities, a similar demographic profile (overseas-born population) and similar distances from the CBD. Kelvin Grove was chosen due to it being a university-based precinct.

A weighted approach was used to ensure a diversity of relevant urban precincts were incorporated into the modelling, and to allow for the most relevant case studies to have a higher influence on modelled results. A weighting of 0.5 was assigned to the most comparable precinct with weightings of 0.3 and 0.2 assigned to the 2nd and 3rd most comparable precincts selected.

Due to the similarity between the 1600m area around the SRL station and the selected case studies, the growth rates achieved within the selected case studies are compared with the modelled projections for the 1600m area. Therefore, the case studies also serve as a benchmark for our modelling, providing insight into whether the magnitude of growth has occurred in comparable locations elsewhere.

As mentioned previously, the choice of case study is not entirely determinative of the final results. There may be other case studies considered appropriate for comparison, however, with the use of weighting and the data points informing primarily the mix of housing rather than the quantum of housing, the results would not differ dramatically. The case studies provide reference points as to where change of the scale projected has occurred, and how that change occurred on the ground (e.g. dwelling density, typology, nature of redevelopment sites).

The case studies provide reference points as to where change of the scale projected has occurred and how that change occurred on the ground (e.g. dwelling density, typology, nature of redevelopment sites).

Table 7.1 provides more details on the scoring and ranking, across all eleven indicators. Appendix D has more information about the case studies, including a profile of affordability, age structure, demographics, and planning considerations.

TABLE 7.1 SIMILARITY SCORE RELATIVE TO BURWOOD AND RANKING, SELECTED CASE STUDIES, 2021

PRECINCT	CITY	RANK	SCORE	TRAIN STATION	DENSITY INDEX (PAST)	DENSITY INDEX (CURRENT)	N'HOOD DENSITY INDEX (PAST)	PUBLIC TRANSPORT JOURNEY TO CBD (MINS)	SEIFA (IRSAD)	OVERSEAS BORN (PAST)	OFFICE EMP. (CURRENT)	UNI	HOSP'L	INDUST'L (EX)
Epping	Sydney	1	0.51	YES	27.29	48.25	25.69	40 Mins	1116	41.7%	1266	NO	NO	NO
Lidcombe	Sydney	2	0.64	YES	30.15	58.75	25.06	38 Mins	991	63.0%	1012	NO	NO	NO
Macquarie University	Sydney	3	0.88	YES	22.02	36.40	32.11	32 Mins	1103	51.7%	15,481	YES	NO	YES
Coorparoo	Brisbane	4	0.95	YES	26.32	38.57	26.08	25 Mins	1101	26.4%	3447	NO	NO	NO
Flemington	Sydney	5	1.01	YES	17.84	55.73	45.32	30 Mins	1072	56.8%	2695	NO	NO	YES
Rockdale	Sydney	6	1.09	YES	42.34	64.07	45.52	28 Mins	1021	52.7%	4314	NO	NO	NO
Auburn	Sydney	7	1.14	YES	29.25	53.99	25.06	41 Mins	943	65.1%	2572	NO	YES	NO
Strathfield	Sydney	8	1.19	YES	38.79	63.63	45.32	22 Mins	1077	56.8%	4698	NO	NO	NO
Hurstville	Sydney	9	1.22	YES	47.54	76.61	38.27	32 Mins	1045	53.9%	3091	NO	NO	NO
Kogarah	Sydney	10	1.25	YES	44.44	60.21	45.52	33 Mins	1025	54.5%	4510	NO	YES	NO
Kelvin Grove	Brisbane	20	1.47	NO	25.93	42.61	26.66	15 Mins*	1086	36.0%	5378	YES	NO	YES
Burwood 1600m Radius Area	**Melbourne**	**-**	**-**	**YES**	**25.70**	**52.03**	**28.17**	**41 Mins**	**1060**	**48.7%**	**3389**	**YES**	**NO**	**NO**

*Source: ABS (2021) Census of Population and Housing various; Google Maps; AJM JV. *Note Kelvin Grove Train Journey is the public transport journey to Roma Street Station.*

To reach higher population densities, all case study areas experienced a significant shift to higher-density dwelling type – a weighted average increase of around +21 percentage points as shown in Table 7.2. In total, high-density dwellings accounted for 79% of all new dwellings, reflecting the need to accommodate population growth in established areas.

Within the selected case studies there were only small increases in low-density dwellings within Lidcombe and Kelvin Grove reflecting some new development lands within those precincts. Low-density dwellings in Epping remained almost unchanged. The housing requirement assessments assume no net increase in low-density dwellings in the Structure Plan Area. This assumption takes into consideration the scarcity of land within Burwood and the increasing acceptance of high-density living in urban areas and the nature of the Structure Plan Area as an established residential area.

TABLE 7.2 PRE- AND POST-DEVELOPMENT DWELLINGS, SELECTED CASE STUDIES, NUMBER AND SHARE, 2001 AND 2021

CASE STUDY	PRE-DEVELOPMENT 2001					POST-DEVELOPMENT 2021				
	LOW-DENSITY	MEDIUM-DENSITY	HIGH-DENSITY	OTHER	TOTAL	LOW-DENSITY	MEDIUM-DENSITY	HIGH-DENSITY	OTHER	TOTAL
Epping (NSW)	4923	1031	2130	17	**8101**	4945	1420	5817	0	**12,182**
Lidcombe	3142	1116	657	82	**4997**	3955	1860	2673	57	**8545**
Kelvin Grove	4151	1868	1536	79	**7634**	4629	2360	5640	47	**12,676**
Weighted average	**4234**	**1224**	**1569**	**49**	**7076**	**4585**	**1740**	**4838**	**27**	**11,190**
Epping (NSW)	60.8%	12.7%	26.3%	0.2%	**100%**	40.6%	11.7%	47.8%	0.0%	**100%**
Lidcombe	62.9%	22.3%	13.1%	1.6%	**100%**	46.3%	21.8%	31.3%	0.7%	**100%**
Kelvin Grove	54.4%	24.5%	20.1%	1.0%	**100%**	36.5%	18.6%	44.5%	0.4%	**100%**
Weighted average	**59.8%**	**17.3%**	**22.2%**	**0.7%**	**100%**	**41.0%**	**15.6%**	**43.2%**	**0.2%**	**100%**

Source: ABS (2021) STRD Dwelling Structure; AJM JV

Table 7.3 outlines the change in household types witnessed in the selected case studies from 2011-2021.

The household types with the strongest increases across the case studies were couple family without children, couple family with children (except in Lidcombe) and lone person households. Increases across these household types will lead to demand for a variety of accommodation including studio / one-bedroom (for lone person households) two-bedroom (for couple families without children) and three or more bedrooms (for couple families with children).

TABLE 7.3 CHANGE IN HOUSEHOLD TYPE, CASE STUDY PRECINCTS, 2011-2021

	EPPING 1600-M RADIUS				LIDCOMBE 1600-M RADIUS				KELVIN GROVE 1600-M RADIUS			
	2011	2021	CHANGE (2011-2021)	ANNUAL GROWTH RATE (%)	2011	2021	CHANGE (2011-2021)	ANNUAL GROWTH RATE (%)	2011	2021	CHANGE (2011-2021)	ANNUAL GROWTH RATE (%)
Couple family without children	1800	2700	900	4.1%	1200	1800	600	4.1%	2100	2700	600	2.5%
Couple family with children	3100	4200	1100	3.1%	2400	2400	0	0.0%	1600	2100	500	2.8%
Other family	800	1100	300	3.2%	900	1000	100	1.1%	800	900	100	1.2%
Multi family	200	300	100	4.1%	300	400	100	2.9%	0	0	0	-
Lone person household	1600	2000	400	2.3%	1000	1300	300	2.7%	2700	3600	900	2.9%
Group household	400	500	100	2.3%	300	700	400	8.8%	1600	1600	0	0.0%
Other	200	300	100	4.1%	200	400	200	7.2%	900	500	-400	-5.7%
Total	**8100**	**11,300**	**3200**	**3.4%**	**6400**	**7900**	**1500**	**2.1%**	**9600**	**11,500**	**1900**	**1.8%**

Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: ABS (2011 & 2021) Census of Population and Housing; AJM JV

Table 7.4 outlines the key evidence taken from the case study analysis and applied in our modelling. The key evidence is the dwelling structure proportions used to allocate population growth. The extent of population growth drives the need for new dwellings, and the dwelling structure proportions are how the model allocates this need.

TABLE 7.4 KEY EVIDENCE DERIVED FROM CASE STUDIES

EVIDENCE	CASE STUDIES	APPLICATION IN MODEL
Household sizes	All case studies	We estimate an average household size across dense urban precincts by looking at all case studies investigated in the scoring and ranking exercise. We apply this estimate to the population in each dwelling structure to estimate the number of dwellings.
Dwelling structure	Selected case studies	Dwelling structure refers to the density and the number of bedrooms a person's dwelling has. We reference these proportions for medium-density and high-density dwellings from the selected case studies to apportion the new population growth within the Structure Plan Area.
Growth in low-density and Medium-density Dwellings	Selected case studies	The growth in low-density and medium-density dwellings in the case studies provides a guide to how much these dwellings would be expected to grow within the Structure Plan. This growth is used as a sense check for our modelled estimates.

Source: AJM JV

8. Structure Plan Area housing demand projections

This section presents the housing demand estimates derived for the Burwood Structure Plan Area, including projected population, housing need, and housing diversity. Population projections are the key driver of additional housing needs and are, therefore, outlined to further understand likely housing needs.

8.1 Population projections

8.1.1 TOTAL POPULATION

Table 8.1 displays the population projections for relevant geographies:

- The population within the Burwood Structure Plan Area is expected to grow from approximately 5300 in 2021 to 11,100 in 2041. This growth translates to an increase of 3.8% per annum. The additional ~5800 people within the Structure Plan Area will create strong demand for additional housing.
- The Burwood Structure Plan population is anticipated to grow at a much faster rate (3.8% per annum) than the South East Region (1.1% per annum) and Greater Melbourne (1.8% per annum).

TABLE 8.1 PROJECTED POPULATION GROWTH, KEY GEOGRAPHIES, 2021-2041

	PROJECTED POPULATION (NO.)		CHANGE (NO.)	ANNUAL GROWTH RATE (%)
	2021	2041	2021-2041	2021-2041
Burwood Structure Plan Area	5300	11,100	5800	3.8%
Burwood 1600m Radius Area	21,100	33,000	11,900	2.3%
South East Region	1,614,900	1,991,900	377,000	1.1%
Greater Melbourne	4,975,300	7,087,100	2,111,800	1.8%

Source: ABS ERP; CityPlan (1600m radius area published in SRL BIC, Structure Plan Area derived from SRL BIC); VIF2023 (South East Region, Greater Melbourne)

8.1.2 AGE STRUCTURE

Figure 8.1 shows the projected age breakdown of residents in the Structure Plan Area. This information is used to model demand for student accommodation and aged care and retirement living in Section 9.

The largest changes in age structure in the Structure Plan Area between 2021 and 2041 are anticipated to be in the 0-4, 5-11 and 26-64 age cohorts.

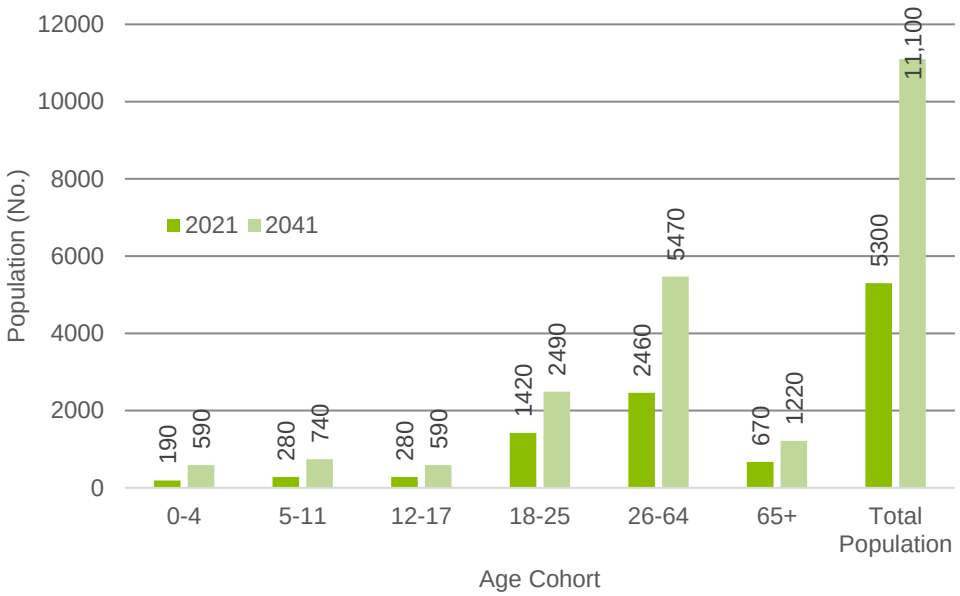


FIGURE 8.1 PROJECTED POPULATION BY AGE GROUP, BURWOOD STRUCTURE PLAN AREA, 2021 AND 2041

Source: ABS ERP; Structure Plan Area population projections derived from CityPlan (published in SRL BIC);; VIF2023 (South East Region, Greater Melbourne)

8.2 Projected housing requirements

The dwelling demand numbers provided in Section 0 represent the modelled estimate of the number of dwellings, by dwelling structure, likely to be required in the Burwood Structure Plan Area to realise the population forecasts derived from the SRL Business and Investment Case (BIC). AJM JV notes the projected housing requirements presented in section 8 are inclusive of future demand for student accommodation within the Structure Plan Area. The projections for student accommodation within the Structure Plan Area are provided in section 9.3.

Appendix E provides a detailed methodology to explain how the analysis derived the projected housing requirements.

8.2.1 TOTAL DWELLINGS

Table 8.2 outlines the total dwellings that will be required in the Structure Plan by 2041. **A total of over 4730 dwellings are estimated to be required by 2041 which reflects a net increase of 2580 over the 20-year time period**.

TABLE 8.2 HOUSING DEMAND, BURWOOD STRUCTURE PLAN AREA, 2021-2041

	2021	2041	2021-2041 CHANGE	ANNUAL GROWTH RATE (%)
Dwellings	2140	4730	2580	4.0%

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

Although some household types in Burwood will become more prominent given the nature of high-density development, it is still important to recognise that the housing in the Structure Plan Area will have to meet the needs of a diverse mix of household types.

8.2.2 DWELLINGS BY TYPE

Table 8.3[32] provides the key housing projections (population, dwelling number, floorspace) by density type for the Burwood Structure Plan Area. Based on case study analysis, dwellings are projected to be predominantly high-density by 2041, representing 61.3% of all dwellings. High-density dwellings are projected to increase by 2690 dwellings between 2021 and 2041. Accounting for demolitions across all dwelling types, 2760 new dwellings are projected to be required to be built.

In line with case studies, modest growth in medium-density housing is anticipated to be required to meet projected growth, with a slight decline in low-density housing as some existing dwellings are replaced with higher-density forms. While there is evidence of market support for medium-density housing currently, to meet projected growth, greater provision of high-density housing is likely to be needed.

TABLE 8.3 HOUSING DEMAND BY DENSITY, BURWOOD STRUCTURE PLAN AREA, 2021-2041

	2021		2041		2021-2041 CHANGE	
	NO.	%	NO.	%	NO.	ANNUAL GROWTH RATE (%)
Population (no.)						
Low-density	3300	62.6%	3200	28.5%	-100	-0.2%
Medium-density	1600	30.7%	1900	17.4%	300	0.9%
High-density	400	6.7%	6000	54.1%	5600	15.2%
Total	**5300**	**100.0%**	**11,100**	**100.0%**	**5,800**	**3.8%**
Dwellings (no.)						
Low-density	1210	56.6%	1040	21.9%	-180	-0.8%
Medium-density	730	33.9%	800	16.8%	70	0.5%
High-density	210	9.6%	2900	61.3%	2690	14.1%
Total	**2140**	**100.0%**	**4730**	**100.0%**	**2580**	**4.0%**
Floorspace (sq.m GBA)						
Low-density	383,400	72.8%	333,700	43.7%	-49,700	-0.7%
Medium-density	124,400	23.6%	133,000	17.4%	8600	0.3%
High-density	18,700	3.6%	297,500	38.9%	278,800	14.8%
Total	**526,500**	**100.0%**	**764,200**	**100.0%**	**237,700**	**1.9%**

Source: BIC; ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials. Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

[32] Note that household sizes implied from Table 8.3 differ between 2021 and 2041. This is because 2041 household sizes applied are based upon an average of the case studies which represents the 'need' for new dwellings. 2021 household sizes are representative of the 2021 Census which because of a low sample size (the Structure Plan Area only) and an unusually high number of dwellings being registered as vacant, is not a strong guide for household sizes going forward. There will also be a change in household size for a given density as the typology within each density is likely to change (e.g. larger medium- and high-density dwellings). Therefore, it is not valid to directly compare household sizes between time periods.

Table 8.4 shows the dwelling projections by density and bedrooms for the Structure Plan Area. High-density, two-bedroom dwellings are projected to be the most common dwelling typology by 2041 with 1760 projected. High-density three or more-bedroom dwellings are predicted to need to increase significantly, accounting for around 9% of all dwellings in 2041 compared to less than 1% in 2021. The net increase in these high-density three or more-bedroom dwellings (400) will outweigh the decrease in low-density three or more-bedroom dwellings (-160).

TABLE 8.4 HOUSING DEMAND BY STRUCTURE (DWELLINGS), BURWOOD STRUCTURE PLAN AREA, 2021-2041

	2021		2041		2021-2041 CHANGE	
	NO.	%	NO.	%	NO.	ANNUAL GROWTH RATE (%)
Low-density						
Studio / 1-bedroom	0	0.1%	0	0.0%	0	-
2-bedroom	110	5.3%	90	1.9%	-20	-1.2%
3+bedroom	1100	51.1%	940	20.0%	-160	-0.7%
Total dwellings	**1210**	**56.6%**	**1040**	**21.9%**	**-180**	**-0.8%**
Medium-density						
Studio / 1-bedroom	50	2.4%	60	1.2%	10	0.4%
2-bedroom	230	10.7%	280	5.9%	50	1.0%
3+bedroom	450	20.8%	460	9.7%	10	0.2%
Total dwellings	**730**	**33.9%**	**800**	**16.8%**	**70**	**0.5%**
High-density						
Studio / 1-bedroom	80	3.6%	730	15.4%	650	11.8%
2-bedroom	120	5.7%	1760	37.3%	1640	14.3%
3+bedroom	10	0.3%	410	8.6%	400	23.1%
Total dwellings	**210**	**9.6%**	**2900**	**61.3%**	**2690**	**14.1%**
Grand total dwellings	**2140**	**100.0%**	**4730**	**100.0%**	**2580**	**4.0%**

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

8.3 Testing housing requirements

This subsection evaluates whether the market has the potential to meet housing demand by assessing the following:

- Does historical growth suggest that the requirements can be fulfilled?
- Does the current pipeline indicate the market is responding to the needs already?
- Is there evidence the diversity of housing implied by the future dwelling mix will be delivered by the market?

Ultimately, this assessment aims to determine whether a substantial change in the current housing delivery is needed to effectively meet the projected housing requirements.

Table 8.5 compares historical dwelling growth to that required to accommodate future population projections, while Table 8.6 presents the dwelling growth achieved annually in the case study areas.

Does historical growth indicate required growth can be achieved?

The need for around 2690 additional high-density dwellings by 2041 growth reflects an average annual increase of **around 135 additional apartments each year over the 20-year period. This is above the historical growth of 18 apartments per annum from 2011-2021.**

Considering the lack of apartment developments in Burwood, we can assess the feasibility of meeting projected requirements by looking at the experience of the case studies. The selected case studies added between 100-210 high-density dwellings annually from 2001-2021. These growth rates demonstrate the required growth rate of 150 per annum is achievable.

Future growth in apartments will likely include a significant share of student accommodation. Deakin University, situated within the Structure Plan, will generate strong demand for student housing. With the recent student housing development in Melbourne being predominantly high-density towers, it is likely the Structure Plan Area will see similar development over time.

The non-student population can still be catered to within the growth of medium-rise apartment buildings. The 20-year increase in medium-density dwellings (70) and three or more-bedroom apartments (400) will accommodate the growth in downsizers and families within the Structure Plan Area.

Overall, historical growth in the case studies indicates required growth can be achieved, with student accommodation likely a key component of this growth.

Does the current pipeline indicate meeting required growth is likely?

There are approximately 470 dwellings identified in the development pipeline to be delivered in the Structure Plan Area by 2027, as identified in the Cordell Connect Construction Database. If all these projects proceed (and they are likely given they are under construction and in presales), it equates to approximately 120 dwellings per annum from 2024-27. With around 135 apartments required to be constructed annually until 2041 (to meet modelled requirements of 2580 net additional dwellings), the current supply pipeline is not quite meeting projected growth. An uplift in annual dwellings completed will be required to meet projected growth.

The market will move in cycles, with current conditions more subdued than previous peaks. An average of around 70 apartments have been approved annually between 2016/17 and 2022/23 in the Burwood Structure Plan Area (based on ABS New Dwelling Approvals, NDA, data). The highest number of apartment approvals occurred in 2019/20, reaching over 130, whereas the approvals dropped to 20 in 2020/21.

The relatively low number of apartments being completed annually in the last couple of years is potentially influenced by prevailing market conditions, predominantly high construction costs and labour shortages in the construction sector, rather than a lack of demand from potential residents. Given the long-term nature of the forecasts, it is likely that market conditions will ease, and construction of apartments can increase to meet demand.

Considering the magnitude of the housing crisis in jurisdictions in Australia and globally, short-term incentives may be needed to increase the construction of housing within the Structure Plan Area.

While the short-term pipeline indicates dwelling delivery may fall short, allowing for market improvement, projected growth can be achieved.

Will the diversity of housing identified in the future mix be delivered?

The analysis presented below indicates a need for a significant increase in the delivery of 3+-bedroom high-density dwellings relative to what the market has delivered to date.

The case studies upon which the projected dwelling mix has been derived have indicated that markets can respond without specific initiatives introduced, supporting growth in family households despite larger high-density dwellings being the predominant form of new housing. In 2021, 3+bedroom high-density dwellings in the case studies represented between 4.5% and 6.9% of total dwellings.

Within the Structure Plan Area, it is reasonable to expect that as low-density housing becomes more unaffordable in relative terms, there will also be stronger demand to drive the market to respond with greater diversity of product, including larger apartments.

Nonetheless, it is prudent to understand the implications if an increase in 3+bedroom high-density dwellings is not achieved. In general terms, if more 1 or 2-bedroom apartments are delivered instead of the larger apartments, more total dwellings will be required to house the population. However, the total floorspace increase required to support this will not be as proportionately great, due to the lower average dwelling sizes of studio / 1-bedroom and 2-bedroom apartments.

To provide an indication of the impact of the growth in 3+bedroom apartments not being achieved, a simple calculation of the effect of limited growth in this dwelling type is presented here. If the share of 3+bedroom dwellings as a share of total high-density dwellings is kept constant from 2021 and the growth not achieved is reallocated to studio / 1-bed and 2-bed apartments, the number of dwellings required to house the projected population would increase slightly (less than 5%). Due to the smaller sizes of the apartments, the total floorspace would likely decrease slightly.

The magnitude of changes to total dwellings and floorspace are not substantial enough to materially change structure planning. The main effect of less growth in 3+bedroom apartments is on the future demographics of the Structure Plan Area.

Less 3+bedroom apartments would result in fewer families but more couples without children and lone person households residing in the Structure Plan Area.

It should be kept in mind that the number of 3+bedroom apartments projected in 2041 represents only 8.6% of all dwellings, within the range achieved in the case studies.

Measures to encourage the delivery of larger apartments could be considered, but there is some evidence from the case studies that the market can respond to some extent to demand from families and other larger households by providing 3+ bedroom apartments. The consequences of not delivering what is in volume terms a modest increase in 3+bedroom high-density dwellings are not significant to meeting population growth. However, there could be an influence on the demographic of the population supported in the Structure Plan Area.

TABLE 8.5 COMPARING PROJECTED DWELLING DEMAND TO HISTORICAL SUPPLY, BY STRUCTURE AND BEDROOMS, BURWOOD STRUCTURE PLAN AREA, 2011-2041

	HISTORIC (NO.)			PROJECTIONS (NO.)	HISTORIC GROWTH (PER ANNUM)		REQUIRED GROWTH TO MEET PROJECTIONS (PER ANNUM)	GAP (PER ANNUM)
	2011	2016	2021	2041	2011-2016	2016-2021 (A)	2021-2041 (B)	(C) = (B) - (A)
Low-density								
Studio / 1-bedroom	10	10	0	0	0	0	0	1
2-bedroom	190	130	110	100	-10	-10	-1	2
3+bedrooms	1120	1110	1100	940	0	0	-8	-4
Total	**1320**	**1250**	**1210**	**1040**	**-10**	**-10**	**-9**	**-1**
Medium-density								
Studio / 1-bedroom	90	80	50	60	0	0	1	6
2-bedroom	180	220	230	280	10	0	3	0
3+bedrooms	150	290	450	460	20	30	1	-31
Total	**420**	**590**	**730**	**800**	**30**	**30**	**4**	**-24**
High-density								
Studio / 1-bedroom	10	50	80	730	10	10	33	27
2-bedroom	20	50	120	1760	0	10	82	68
3+bedrooms	0	0	10	410	0	0	20	19
Total	**30**	**100**	**210**	**2900**	**10**	**20**	**135**	**113**
Grand total	**1770**	**1940**	**2140**	**4730**	**30**	**40**	**130**	**90**

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Numbers rounded – sum of the rounded numbers may not equal the rounded totals.

Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC) Source: ABS (2011-2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials.

TABLE 8.6 DWELLING GROWTH PER ANNUM, SELECTED CASE STUDIES, 2001-2021

CASE STUDY	ADDITIONAL DWELLINGS PER ANNUM (2001-2021)			
	LOW-DENSITY	MEDIUM-DENSITY	HIGH-DENSITY	TOTAL
Epping (NSW)	0	20	180	**200**
Lidcombe	40	40	100	**180**
Kelvin Grove	20	20	210	**250**
Weighted Average	**20**	**30**	**160**	**210**

Source: ABS (2001 & 2021) STRD Dwelling Structure; AJM JV

8.4 Implications for Burwood Structure Plan

The analysis in this section highlights the following considerations for the Burwood Structure Plan:

- The Structure Plan Area is projected to need to support a net increase of 2580 dwellings from 2021. This will require 130 new dwellings per annum.
- Growth in the selected case studies reached as high as 250 apartments per annum. This demonstrates that required growth in the Structure Plan Area is achievable based on similar precincts.
- From 2021 to 2041, the Structure Plan Area is projected to need 2690 new high-density dwellings, with low-density housing being replaced, resulting in limited growth or potentially a net decline of low-density housing. Structure planning will need to allow for this to occur in lower-density areas.
- The Structure Plan Area will need to sustain a high annual number of apartment completions to support the projected population growth. While there is precedent for high growth rates elsewhere, sustaining these rates over a 20-year interval may be challenging.
- What has been delivered in apartment buildings to date has been focused on one and two-bedroom apartments, attracting mainly lone person and couple households. It should be noted the case study precincts indicate this type of change is not unusual.
- An increase from the currently low level in three or more-bedroom high-density dwellings, although not critical to achieving population growth, is needed to accommodate a broader range of groups including families with children as well as group households, which are common in areas with large student numbers. It is therefore important that the Structure Plan promote a broader range of apartment types, especially emphasising the construction of larger apartments (living space and bedroom numbers) to accommodate projected population growth across a range of demographic cohorts.
- Medium-density dwellings, such as three-bedroom townhouses, will need to be a part of the future mix of dwellings in the Burwood Structure Plan Area, albeit a significantly smaller share. Townhouses often cater to families and older couples, providing an option that is more space efficient than low-density housing. To ensure that the Structure Plan Area achieves 130 new dwellings per annum, consideration needs to be given to whether a medium density outcome for a site within the Structure Plan Area is the most efficient and desirable use of the site. Accommodating future population growth in predominantly high-density dwellings, across larger areas, near the station and along major roads of the Structure Plan Area, results in a more efficient use of land, allowing more capacity to also support non-residential land uses.

9. Housing for diverse community needs

This section estimates the demand[33] for various housing types designed to address specific community requirements or accommodate particular demographic groups within the Structure Plan Area. These include social and affordable housing, key worker housing, student accommodation, and aged care and retirement living.

Note the housing requirements estimates provided in here are a subset of the total demand estimates in Section 8. There is no additional requirement for forms of diverse accommodation as often the choice of accommodation type is a matter of preference (e.g. students can decide if they wish to live in student accommodation or standard residential apartments).

The diverse housing estimates here are based on the projected population and demographic profile within the Structure Plan Area, which for the purposes of this analysis, is a fixed estimate. Workers and students working/studying in the Structure Plan Area are considered for key worker and student accommodation respectively.

It should be noted there may be opportunity for the Structure Plan Area to play an elevated role in meeting the diverse housing needs of a wider population area. The attributes of the Structure Plan Area, particularly with excellent future access to public transport and other amenity, mean it will be a location suited to supporting diverse housing types, including affordable and social housing, student accommodation, key worker housing and so on. A wider population base may, therefore, desire diverse accommodation beyond the projected population living in the Structure Plan Area. For this reason, the estimates below potentially represent a minimum estimate of the potential opportunity for accommodation located in the Structure Plan Area.

These estimates are not targets and do not represent the number of each housing type that must be provided in the Structure Plan Area. They should rather be thought of as an indication of the potential demand that may exist for a wide range of community needs. In many cases, the housing will be delivered by private developers in response to future market demand (e.g. student accommodation, aged care and retirement living).

9.1 Social and affordable housing

Social and affordable housing are an important component of the housing mix providing accommodation to groups within society which cannot afford accommodation on the private market. The modelled the demand for social and affordable housing to indicate the potential scale of social and affordable housing, based on the share of households who may meet eligibility criteria.

9.1.1 SOCIAL AND AFFORDABLE HOUSING DEFINITION

Affordable housing refers to housing options which are available at a rent or price lower than the local market rate. Affordable housing may be owned by private developers, local governments, charitable organisations or community housing providers. It is usually managed by community housing providers. Affordable housing is considered to be accessible for those on moderate incomes or below.

For the purposes of the modelling the income ranges that are eligible for affordable housing are outlined in Table 9.1.

Social housing refers to government-subsidised short and long-term rentals. There are two types of social housing - ‘public housing’ which is owned by the government and ‘community housing’ which is managed (and sometimes owned) by not-for-profit organisations. Social housing rents are calculated based on income – typically 25-30% of household income – and target people on very low

[33] Housing projections in section 7 and 8 are described as requirements while in section 9 they are described as estimated demand since diverse housing is only a potential subset and is not technically required.

incomes, and who often have experienced homelessness, family violence or have other complex needs.

For the purposes of this assessment, the eligibility for social housing is defined by the income ranges provided by Housing Victoria, outlined in Table 9.1. As defined, social housing is a subset of affordable housing that falls within the very-low- and low-income brackets.

Appendix F provides a further explanation of the methodology behind the social and affordable housing estimates.

TABLE 9.1 SOCIAL AND AFFORDABLE HOUSING INCOME RANGE CLASSIFICATION, GREATER MELBOURNE, 2023

HOUSEHOLD TYPES	VERY LOW INCOME RANGE (ANNUAL)	LOW INCOME RANGE (ANNUAL)	MODERATE INCOME RANGE (ANNUAL)	SOCIAL HOUSING INCOME RANGE (ANNUAL)
Single adult	Up to $26,200	$26,201 - $41,920	$41,921 - $62,860	<$32,552
Couple, no dependants	Up to $39,290	$39,291 - $62,870	$62,871 - $94,300	<$56,264
Family (with one or two parents) and dependent children	Up to $55,000	$55,001 - $88,020	$88,021 - $132,030	<$58,292

Note: The annual income limit for social housing increases by $2028 for each additional dependent. Source: Victoria Government Gazette No. G 25, 23 June 2023; Housing Victoria

The eligibility for social housing and criteria for affordable housing overlap, meaning that some households that are eligible for social housing will also be eligible for affordable housing and vice versa. Furthermore, the income ranges for social housing can fall within very low or low affordable income brackets depending on the household type. The two above reasons mean projections for social and affordable housing must be considered together.

Finally, it is important to reiterate that the social and affordable estimates provided here represent the number of households potentially eligible for such housing. The number of households potentially eligible for affordable housing can be reduced if the cost of housing decreases, potentially through greater amounts of affordable supply built, or an increase in the total amount of supply relative to demand, which would put downward pressure on housing costs.

9.1.2 SOCIAL AND AFFORDABLE AND HOMELESSNESS METHODOLOGY

In brief, the methodology for estimating demand for social and affordable housing involves calculating the proportion of households with very low, low, and moderate incomes, as of the 2021 Census (using the 2021 income ranges). These estimates are then refined to only include households falling within these income brackets who are renters and are in rental stress, defined as those with 30% or more of their household incomes going towards rent.

It is important to note, this methodology does not consider forecasts or assumptions for changes in relative housing costs (rents) faced by households. It is not possible to accurately predict relative change in incomes versus rents over 15-20 years.

An estimate of individuals experiencing homelessness[34] within the Structure Plan Area is also incorporated into the assessment for the demand for social and affordable housing. It is vital to ensure those who are currently homeless (and therefore not counted in current rental data) are provided access to social or affordable housing.

The detailed methodology for assessing social and affordable housing demand and homelessness is detailed further in Appendix F.

9.1.3 SOCIAL AND AFFORDABLE HOUSING DEMAND RESULTS

Table 9.2 provides estimates of those in need of social housing and affordable housing within the Burwood Structure Plan Area from 2021 to 2041.

[34] Groups defined as homeless are defined in Appendix E

There is projected to be a growing need for more affordable housing with a total of **630 households/individuals including homeless across the Structure Plan Area projected to be eligible for social and affordable housing by 2041.**

The number of households eligible for social housing, which includes those on very low and low incomes, is projected to be 270 by 2041.

The number of people experiencing homelessness[35] is estimated at around 70 in 2021, which assuming continuation of the current proportion, would increase to approximately 160 by 2041. These individuals are most in need and are least likely to be able to afford to rent or purchase their own home.

TABLE 9.2 SOCIAL AND AFFORDABLE HOUSING REQUIREMENTS, BURWOOD STRUCTURE PLAN AREA, 2021-2041

GROUP ELIGIBLE FOR SOCIAL / AFFORDABLE HOUSING	STEPS	NO.		CHANGE (NO.)	ANNUAL GROWTH RATE (%)
		2021	2041	2021-2041	
Very low income (households)	(A)	130	290	160	4.0%
Low income (households)	(B)	50	120	70	4.0%
Social housing (households)	**(C) = Subset of (A) and (B)**	**120**	**270**	**150**	**4.0%**
Moderate income (households)	(D)	30	60	30	4.0%
Homelessness estimate (individuals)	(E)	70	160	90	4.0%
Total "in need"	**(F) = (A) + (B) + (D) + (E)**	**290**	**630**	**340**	**4.0%**

Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV

[35] Groups defined as homeless are defined in Appendix F

9.2 Key worker housing

9.2.1 KEY WORKER HOUSING DEFINITION

The term 'key worker' lacks a consistent or universally accepted definition in Australia. Key workers are generally described as employees engaged in essential services crucial to a city's operation. They must be physically present at their workplaces and often operate beyond regular business hours.

The designation of key worker encompasses individuals traditionally linked to the concept, such as teachers, doctors, nurses, police, and emergency service personnel. Additionally, it is often extended to roles like laundry workers, cleaners, public transport operators, aged care, and childcare workers, as well as community services and support staff.

Ensuring that key workers can reside near their workplaces is vital. This proximity is especially critical in fields like healthcare and emergency services, for workers to cover shifts, quickly respond to increases in service demand and attend emergency situations. Given that SRL East Structure Plan Areas serve as key employment hubs, it is advisable to promote key worker housing[36] within walking distance of SRL East stations and major employers such as universities and hospitals.

Due to their generally modest incomes, key workers are particularly vulnerable to high housing costs. As housing costs continue to rise, securing suitable and affordable housing near work becomes a significant challenge for key workers, often resulting in lengthy commutes.

The objective of this analysis is to identify the residential locations of key workers with very low to moderate incomes. This understanding will shed light on the potential for providing suitable housing options, aiming to reduce the share of workers commuting from outside the region.

It is important to note that those key workers on low incomes who reside in the Structure Plan Area will be a subset of the affordable housing needs estimated in Section 9.1. Key workers who reside outside of the Structure Plan Area represent demand that could potentially be accommodated depending on the strategic direction of SRLA or the response from providers (i.e. key workers who live outside the Structure Plan Area could move into the area, closer to their place of work).

9.2.2 KEY WORKER HOUSING DEMAND METHODOLOGY

In short, the methodology for assessing key worker housing demand involves determining the number of key workers with very low, low, and moderate incomes and understanding their place of residence. The share of key workers by broad industry sector in 2021 is applied to the job projections (by broad industry sector) to estimate the potential number of key workers in 2041.

Key workers living outside the South East Region are considered the target for key worker housing, as they are the workers with long commutes who could benefit from key worker housing close to their place of work. However, going forward, it cannot necessarily be assumed that key workers will be able to live in the South East Region in the same proportion as they do now. Therefore, the total estimated number of low-income key workers could create demand for the delivery of dedicated key worker housing.

Note that the share of key workers in different industries and the share of those key workers on very low to moderate incomes and their place of residence has been derived for a 1600-metre radius area from the station (as opposed to the Structure Plan Area) due to data reliability issues at a small area when multiple criteria are used for segmentation (e.g. by industry, by occupation, by income, by residential location). The proportion of key workers in different industries and places of residence at the 1600-metre radius area has been applied to workers in the Structure Plan Area.

[36] There is no universal definition for key worker housing. Some define it as rental housing for key workers with very low, low, or moderate household incomes, which must be owned, managed, allocated, and monitored by a Registered Housing Agency or registered charity. This report focuses on the number of key workers with low to moderate incomes, regardless of housing tenure. If more key workers can live closer to their place of work, either renting or purchasing, it would be considered a good outcome.

9.2.3 KEY WORKER HOUSING DEMAND RESULTS

As of 2021, it is estimated that approximately **3180 key workers were working in the Structure Plan Area**. Of those, just over 40% were earning very low to moderate incomes.

TABLE 9.3 ESTIMATED NUMBER OF KEY WORKERS (TOTAL AND EARNING VERY LOW TO MODERATE INCOMES), BURWOOD STRUCTURE PLAN AREA, 2021

INDUSTRY	TOTAL JOBS (WORKERS)	TOTAL KEY WORKERS	PROPORTION OF TOTAL KEY WORKERS EARNING VERY LOW TO MODERATE INCOMES	TOTAL VERY LOW TO MODERATE KEY WORKERS
Education	4200	2160	36%	775
Health	700	680	52%	355
Other	4100	340	65%	220
Total	**9000**	**3180**	**42%**	**1350**

Numbers rounded – sum of the rounded numbers may not equal the rounded totals Source: ABS (2021) INDP Industry of Employment; AJM JV

When examining the residential distribution of key workers by LGA, 22% of key workers on very low to moderate incomes reside in Whitehorse and a further 15% reside in Monash. A further 26% live in Boroondara, Knox, Glen Eira, Maroondah and Manningham– all of which are part of the South East Region. In total, 72% of key workers on very low to moderate incomes live in the South East Region.

TABLE 9.4 KEY WORKERS (EARNING VERY LOW TO MODERATE INCOMES) PLACE OF RESIDENCE BY LGA, BURWOOD STRUCTURE PLAN AREA, 2021

PLACE OF RESIDENCE (LOCAL GOVERNMENT AREA)	PROPORTION OF TOTAL VERY LOW TO MODERATE KEY WORKERS
Whitehorse	22%
Monash	15%
Boroondara	10%
Knox	6%
Casey	4%
Glen Eira	4%
Maroondah	3%
Melbourne	3%
Manningham	3%
Yarra Ranges	3%
Elsewhere	25%
Total	**100%**

Within the South East Region
Source: ABS (2021) INDP Industry of Employment; AJM JV

Table 9.5 shows that around **2100 key workers (earning very low to moderate incomes) will work in the Burwood Structure Plan Area in 2041**. Without more affordable housing for these key workers, the proportion working and living in the Structure Plan Area will likely decline.

If affordability remains unchanged and commuter and residential patterns among workers stays the same as it is in 2021 (i.e. key workers who can afford to live in the South East Region in 2021 still can in 2041), by 2041 almost 800 Burwood Structure Plan Area key workers on very low to moderate incomes would live in the City of Whitehorse and City of Monash.

Again, assuming the share of those living outside the South East Region remains constant at 28%, by 2041 there will be around 580 key workers (earning very low to moderate incomes) living outside the South East Region.

If the objective is to offer appropriate housing to reduce the need for workers to travel from outside the Region to work in Burwood, efforts should be directed towards providing suitable housing options for this cohort. However, given the possibility affordability across the Region may worsen, the potential demand could come from the entire lower income key worker cohort (2100 in 2041).

TABLE 9.5 PROJECTED KEY WORKERS (EARNING VERY LOW TO MODERATE INCOMES), BURWOOD STRUCTURE PLAN AREA, 2041

INDUSTRY	TOTAL JOBS (WORKERS)	TOTAL KEY WORKERS	TOTAL VERY LOW TO MODERATE KEY WORKERS
Education	6400	3295	1180
Health	800	780	405
Other	9700	800	515
Total	**16,900**	**4875**	**2100**
Total living outside the South East Region (@ 29%)			580

Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: ABS (2021) INDP Industry of Employment & INCP Total Personal Income (weekly); Structure Plan Area population and employment projections derived from CityPlan (published in SRL BIC); AJM JV

9.3 Student accommodation

9.3.1 STUDENT ACCOMMODATION DEFINITION

Student accommodation is defined as accommodation specifically built for, and to cater towards, students enrolled at an institution of tertiary education. This is otherwise known as Purpose Built Student Accommodation (PBSA).

The Burwood Structure Plan Area contains Deakin University's Burwood campus. Deakin university is a ranked within the top 300 universities in the world and the Burwood campus has an estimated 26,000 enrolments as of 2023. Considering the tight rental market in recent years, providing specialist student accommodation may enable more individuals, in particular prospective regional and international students, to receive a tertiary education.

It is estimated there are currently just over 1300 operational PBSA beds within the Structure Plan. Based on discussions with local PBSA operators and industry knowledge of the PBSA market, it is thought the vast majority of students residing in PBSA within the Structure Plan are higher education students at Deakin University.

The modelled the likely requirement for PBSA in the Burwood Structure Plan by estimating student enrolments at the Deakin University and applying propensities to live in dedicated student accommodation to estimate the demand for PBSA. This represents the demand generated from education institutions within the Structure Plan, i.e. Deakin University.

Considering there is no strict requirement for students to reside in PBSA during their studies, the requirements for PBSA is not additional to the required dwelling estimates provided in Section 8, but could potentially be a form of housing that supports that demand (e.g. studio/one-bed high-density).

9.3.2 STUDENT ACCOMMODATION DEMAND

Table 9.6 provides estimates for student enrolments at Deakin University's Burwood Campus and the potential requirement for PBSA beds to house these students. A further explanation is provided in Appendix F.

Applying propensity rates to estimate PBSA demand (based on Urbis Student Accommodation Benchmarks) and a market share for the Structure Plan (representing the proportion of demand existing supply is attracting), results in a projected demand for 1350 beds based on Deakin's 2023 enrolments, increasing to 1910 beds demanded by 2041. This represents growth of 560 beds to 2041. Propensity rates decrease by 2041 because of a decrease in the propensity of interstate and regional student. Propensities are further explained in Appendix F.

The required student accommodation does not have to be built within the Structure Plan and could be built in areas outside of the Structure Plan with suitable amenity. While we have estimated the required amount of PBSA within the Structure Plan there is flexibility as to where this is built.

PBSA facilities are usually 25 beds or more, which means the projections support many new facilities.

TABLE 9.6 PROJECTED ENROLMENTS AND PBSA DEMAND, BURWOOD STRUCTURE PLAN AREA, 2023-2041[37]

	NO.		2023-2041 CHANGE	
	2023	2041	NO.	ANNUAL GROWTH RATE (%)
Burwood Campus Enrolments	26,300	42,000	15,700	2.6%
PBSA Propensity	11.4%	10.1%	-	-
Bed Requirement -Burwood Campus	3000	4260	1260	2.0%
	Structure Plan Market Share @ 44.9%			
Burwood Structure Plan Bed Requirement	1350	1910	560	1.9%

Source: Population growth rates are for the 18-25 cohort projected by CityPlan (derived from SRL BIC); Department of Education; Vet Institutions Annual Reports; AJM JV

[37] PBSA Supply includes facilities that are predominantly tailored to higher education students.

9.4 Aged care and retirement living

9.4.1 AGED CARE AND RETIREMENT LIVING DEFINITION

Diverse housing for older persons encompasses two distinct types of specialised accommodation:

- Independent Living Units (ILUs) are targeted at those over 65 and offer a communal living environment for seniors. There is no day-to-day care or medical support provided as part of this accommodation.
- Aged Care, also referred to as Residential Aged Care (RAC), refers to facilities that offer 24/7 medical support for elderly residents who require such assistance.

ILUs and RACs provide living conditions tailored to the needs of the elderly and are, therefore, an important component of the Structure Plan Area housing mix. As the population continues to age, there is expected to be a notable surge in demand for retirement living accommodation.

9.4.2 AGED CARE AND RETIREMENT LIVING DEMAND METHODOLOGY

The method used to evaluate the demand for RACs, as well as ILUs, involves applying propensity rates of the over-65 population within the Structure Plan to reside in either RACs or ILUs.

The propensity rates are estimated by considering the current supply of units or beds against the over-65 population in the Structure Plan Area. When there is not supply within the Structure Plan, the Greater Melbourne propensity is utilised. These propensities, therefore, consider the relative supply available currently and may differ from average propensity rates seen across the Greater Melbourne Greater Capital City Statistical Area (GCCSA), sourced from the 2021 Census.

Appendix F details the methodology for assessing demand for residential aged care beds and retirement living units.

9.4.3 AGED CARE AND RETIREMENT LIVING DEMAND RESULTS

By 2041, based on population projections, there will be 1220 residents in the Structure Plan Area aged over 65 years.

ILU and RAC propensities are set so they equate to the supply in the Structure Plan Area (outlined in Section 9.5 below). The implied propensity rate for ILUs in the Burwood Structure Plan Area based on existing supply and allowing for 1.25 residents per unit, is 16.8% of the over-65 years population. This is significantly higher than the Greater Melbourne propensity of 4.3%, highlighting the current supply in two retirement communities within the Structure Plan Area.

There are currently no RAC beds in the Structure Plan Area, however. We have therefore applied the Greater Melbourne propensity of 4.7% to estimate future RAC demand.

Table 9.7 shows an estimated requirement for 160 ILUs by 2041 should the current high propensity be maintained. This represents an increase of 70 units from 2021 levels.

Applying the current propensity rate for Greater Melbourne, there is a projected requirement for 60 RAC beds in 2041. While RACs make up a small proportion of the total housing demand, like ILUs, they are important since they provide medically supported living to elderly residents in need. The supply could also increase more than this demand indicates should higher propensity rates apply in line with the high ILU propensity.

With ILU facilities having around 50 to 100 units and RAC facilities usually providing around 25 to 75 beds, these forecasts support two to four new ILU and 1 new RAC facility.

TABLE 9.7 ILU AND RAC DEMAND, BURWOOD STRUCTURE PLAN, 2021-2041

	2021	2041	2021-2041 CHANGE	2021-2041 ANNUAL GROWTH RATE (%)
Population	5,300	11,100	5,800	3.8%
Population (65+)	670	1220	550	3.0%
ILUs				
ILU propensity rates	16.8%	16.8%	-	
Demand - potential ILU residents	113	210	97	3.2%
Average household size	1.25	1.25	-	
Demand - potential ILUs	**90**	**160**	**70**	2.9%
RACs				
RAC propensity rates	-	4.7%	-	
Demand - potential RAC beds	**-**	**60**	**-**	**3.5%**

Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS ERP; AJM JV

9.5 Additional need

The amenity provided within the Structure Plan Area (train station, education etc) enables accommodation within the Structure Plan Area to draw demand from a wide geographic base. The consequence is that using the Structure Plan population as the basis for modelling has the potential to understate the demand for diverse housing within the Structure Plan. The modelled requirements for all forms of diverse housing should serve as a starting point (bar student accommodation), with additional amounts of supply potentially supportable when including demand from outside the Structure Plan.

Furthermore, because of the relatively small amounts of supply of diverse accommodation types within the Structure Plan market, is difficult to gauge how the market is tracking to meet demand. To help understand the magnitude of extra supply that would be needed to satisfy potential requirements, Table 9.8 shows the existing supply as of 2021 compared to the modelled requirements in 2041.

There is a large discrepancy between the existing supply and projected eligibility of social and affordable housing. An extra 550 dwellings are estimated to be required by 2041, representing 15% of the total additional dwellings required identified in the previous section. With no upward trend in social and affordable housing seen in the last ten years, it is likely policy settings will be required to shift within the Structure Plan to stimulate supply. Additional social and affordable housing could also be used to house the expected number of key workers within the Structure Plan.

The projected requirement for PBSA to serve Deakin Universities Burwood campus is quite significant at 1910. It is important to note that this represents beds (rather than dwellings) and this requirement does not need to be met entirely within the Structure Plan.

The projected requirement for ILUs and RACs by 2041 will not support significant growth across the Structure Plan.

TABLE 9.8 DIVERSE HOUSING NEEDS, BURWOOD STRUCTURE PLAN AREA, 2021-2041

	EXISTING SUPPLY	MODELLED REQUIREMENT - 2041	GAP (+ UNDERSUPPLY, - OVERSUPPLY)	PROPORTION OF TOTAL ADDITIONAL DWELLINGS NEEDED
Total "in need" - affordable, social and homeless requirement	80	630	**+550**	21.3%
Student accommodation	1350	1910	**+560**	-
Retirement village (ILU)	90	160	**+70**	2.7%
Residential aged care facility (RAC)	0	60	**+60**	-

Note: Affordable and social housing supply is derived from the 2021 Census. RACs are measured in terms of beds and cannot be compared with dwellings required. Numbers rounded. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS ERP; AJM JV

9.6 Implications for Burwood Structure Plan

The analysis in this section highlights the following considerations for the Burwood Structure Plan:

- In 2041, 630 households are estimated to be eligible for social and affordable housing. Accounting for the existing supply of 80 social or affordable dwellings, the gap of 550 households represents 21.3% of the total dwellings estimated to be required in 2041. The lack of new supply of social and affordable housing indicates that a range of initiatives may need to be used to stimulate more affordable and social housing within the Structure Plan Area.
- There is substantial demand for student accommodation within the Structure Plan Area, owing to the presence of Deakin University. With the expected growth in enrolments at the University, supporting delivery of appropriate forms of student accommodation should be a part of structure planning.
- While student housing should be allowed for within the Structure Plan Area, there is not an overwhelming need to intervene to ensure purpose-built facilities delivered. This is a market driven by private operators who will respond to any market need that emerges.
- Aged care and retirement living is expected to see strong levels of growth to 2041, with 70 additional ILUs 60 additional RAC beds required. The Structure Plan will need to cater to this demand with appropriate forms of accommodation (ILUs and RACs) is important to ensure a cohesive community.
- Aged care and retirement living is largely delivered by the private sector. In future, with high-density retirement options becoming more common, these developments can be supported across much of the Structure Plan Area, including the core.
- Around 2100 key workers earning very low to moderate incomes are estimated to work in the Burwood Structure Plan Area in 2041. Of this cohort, 1520 workers are anticipated to reside within the South East Region. Efforts should be directed towards providing suitable housing options, however this of lesser importance to the social and affordable housing, student accommodation and aged care and retirement living need.

Part D: Summary and recommendations

Part D includes:

- **Section 10** summarises the findings of the assessment provided in the previous sections.
- **Section 11** makes recommendations for housing planning and development to consider when developing the Structure Plan.

10. Overview of housing demand

This section provides a concise overview of policy expectations related to housing in Burwood, and the housing requirements within the Structure Plan, in total and for diverse housing for the community.

10.1 Housing policy expectations and goals

Various policies express the need for greater housing supply to support projected population growth, address housing shortages, and combat affordability concerns. This includes specific reference to unlocking potential around major transport projects in Melbourne's inner and middle suburbs is a key focus. SRL East precincts are an important opportunity to deliver new homes in established suburbs.

The combination of Victorian and local government policies points to the following themes for housing delivery in Burwood:

- Like the other SRL East locations, Burwood will play a vital role in supporting population growth and enhancing housing density and diversity in a strategic urban location. Redevelopment around the station provides an important opportunity to deliver new homes in established suburbs.
- As a designated education precinct, Burwood is strategically well-positioned to accommodate student accommodation close to Deakin University.
- It is necessary to guarantee sufficient housing stock and appropriately allocate land use for both present and future residents, while also maintaining a balance to ensure ample land remains available for employment purposes.
- Considerations for height limits and development styles will need to be made to not compromise the area's natural assets such as Gardiners Creek.
- There is an identified need for improved housing diversity and affordability, including the provision of social housing.

These themes are reflected by the findings from subsequent sections of this report which identify the required quantum, nature, and location of housing in Burwood.

10.2 Total housing need in the Structure Plan Area

Table 10.1 and Table 10.2 summarise dwelling growth by structure that is expected to be achieved and needed to support the projected population growth. Key points to note from these projections are detailed below:

- The population of the Burwood Structure Plan Area will increase from around 5300 in 2021 to reach almost 11,100 by 2041. This represents a per annum growth of 3.8%.
- This is above historical growth between 2011 and 2021, when the average annual population growth of the Structure Plan Area was 1.5%.
- The housing requirements model estimates around 2580 net additional dwellings will be required by 2041 to accommodate population growth. This equates to around 240,000 sq.m of residential floor space.
- Accommodating the projected population growth will require a further shift to high-density living, with most new dwellings being high-density. This will also necessarily result in some replacement of older stock, which are predominantly low-density dwellings.
- The proportion of three or more-bedroom high-density dwellings required is projected to rise from the current 0.3% of all dwellings to 8.6% in 2041. The increase will allow diverse family types to be accommodated within the Structure Plan. The increase in high-density three or more-bedroom dwellings will more than offset the projected reduction in larger, low-density dwellings.
- The case studies applicable to Burwood (Epping, Lidcombe and Hurstville) show that these precincts, predominantly comprising apartments, can still cater to the demand for 3-bedroom apartments and owner occupiers.
- The Structure Plan will need to sustain a higher annual number of apartment completions to compared to recent growth. However, the growth experienced in the selected case studies demonstrates these growth rates are feasible.

TABLE 10.1 KEY HOUSING PROJECTIONS, BURWOOD STRUCTURE PLAN, 2021-2041

	2021	2041	2021-2041 CHANGE	ANNUAL GROWTH RATE (%)
Population	5300	11,100	5800	3.8%
Dwellings	2140	4730	2580	4.0%
Floorspace sq.m	526,500	764,200	237,700	1.9%

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

TABLE 10.2 DWELLING STRUCTURE PROJECTIONS, BURWOOD STRUCTURE PLAN, 2021-2041

	2021		2041		2021-2041 CHANGE	
	NO.	%	NO.	%	NO.	ANNUAL GROWTH RATE (%)
Low-density						
Studio / 1-bedroom	0	0.1%	0	0.0%	0	-1.6%
2-bedroom	110	5.3%	90	1.9%	-20	-1.2%
3+bedroom	1100	51.1%	940	20.0%	-160	-0.7%
Total dwellings	**1210**	**56.6%**	**1040**	**21.9%**	**-180**	**-0.8%**
Medium-density						
Studio / 1-bedroom	50	2.4%	60	1.2%	10	0.4%
2-bedroom	230	10.7%	280	5.9%	50	1.0%
3+bedroom	450	20.8%	460	9.7%	10	0.2%
Total dwellings	**730**	**33.9%**	**800**	**16.8%**	**70**	**0.5%**
High-density						
Studio / 1-bedroom	80	3.6%	730	15.4%	650	11.8%
2-bedroom	120	5.7%	1760	37.3%	1640	14.3%
3+bedroom	10	0.3%	410	8.6%	400	23.1%
Total dwellings	**210**	**9.6%**	**2900**	**61.3%**	**2690**	**14.1%**
Grand total dwellings	**2140**	**100.0%**	**4730**	**100.0%**	**2580**	**4.0%**

Note: 2041 numbers are inclusive of a 5% applied vacancy rate. 2021 dwelling numbers refer to all private dwellings are therefore inclusive of vacancies. Numbers rounded – sum of the rounded numbers may not equal the rounded totals. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; AJM JV; Urbis Apartment Essentials

10.3 Housing to meet diverse community needs in the Structure Plan Area

Table 10.3 summarises the projected housing requirements for identified specialist accommodation forms to meet the needs of a diverse community. The key points to note include:

- The demand for diverse housing within the Structure Plan, as outlined in Section 9, is a subset of the overall requirement for housing within the Structure Plan Area.
- Modelling shows that around 630 households within the Structure Plan would be eligible for social and affordable housing by 2041. Policy settings will need to be in place to ensure this need is met within the Structure Plan Area.
- Estimate is potentially conservative and the need for affordable and social housing could prove greater. We note that the eligibility for social and affordable housing depends predominantly on real incomes of Structure Plan residents and magnitude of housing costs, both of which could shift significantly by 2041.
- It is projected that around 2100 key workers (earning very low to moderate incomes) will work in the Burwood Structure Plan Area in 2041. Without increased provision of affordable housing for these key workers, the proportion of key workers working and residing in the Structure Plan will likely decline.
- There is substantial demand for student accommodation of around 1910 beds within the Structure Plan, owing to the presence of Deakin University. With the expected growth in enrolments at the University providing appropriate forms of student accommodation should be a part of structure planning. Not all supply has to be built within the Structure Plan Area and could be supported in other SRL East locations.
- Aged care and retirement living options should be provided to cater for the growth in the elderly population. Catering to this demand with appropriate forms of accommodation (ILUs and RACs) is important to ensure a cohesive community.

TABLE 10.3 PROJECTED DIVERSE HOUSING ACCOMMODATION REQUIREMENTS, BURWOOD STRUCTURE PLAN AREA, 2041

	EXISTING SUPPLY	MODELLED REQUIREMENT - 2041	GAP (+ UNDERSUPPLY, - OVERSUPPLY)
Total "in need" - affordable, social and homeless requirement	80	630	**+550**
Student accommodation (beds)	1350	1910	**+560**
Retirement village (ILU)	90	160	**+70**
Residential aged care facility (RAC)	0	60	**+60**

Note: Affordable and social housing supply is derived from the 2021 Census. Source: Structure Plan Area population projections derived from CityPlan (published in SRL BIC); ABS (2021) Census of Population and Housing; Urbis Retirement & Aged Care Database; AJM JV

11. Recommendations and opportunities

This section summarises the key recommendations and other opportunities relating to housing that should be considered when developing the Structure Plan and related planning controls or housing policies.

11.1 Recommendations

11.1.1 HOUSING QUANTUM AND DENSITY

Recommendation 1 - Plan for almost 2600 net new dwellings in the Burwood Structure Plan Area to accommodate an additional population of around 5800 people by 2041.

The analysis in this report has identified that to meet the projected population growth estimates, the Structure Plan Area will need to accommodate:

- A population increase of around 5800, reaching 11,100 people by 2041.
- 2580 additional dwellings, more than double the current 2140. This will require delivery of around 130 net new dwellings annually on average.
- An additional 237,700 sq.m of residential floorspace.

Recommendation 2 - Facilitate the delivery of high-quality, predominantly high-density housing to meet the projected dwelling increase.

Close to two-thirds of all dwellings are expected to need to be high-density by 2041 to support population growth, with an increase of almost 3000 high-density dwellings over the 20-year period.

Recommendation 3 – Encourage the delivery of the higher density housing in preference to low- or medium-density forms.

As existing residential areas attract redevelopment, our analysis projects there will be a reduction of around 180 low-density dwellings. But achievement of forecast population requires low-density housing to be replaced with higher density forms. Low-density housing is, and will remain, the predominant form in large parts of Burwood. However, if existing separate houses are too frequently replaced by, say, a new single house or even a duplex development, the net increase in dwellings will be limited.

In recent years, there has been a trend of small subdivisions across the Burwood Structure Plan Area. Large lots have been split into two, three, four or even more separately titled lots. Some dwellings are semi-detached (classified as medium-density) while some are detached, albeit smaller, dwellings. Since 2011, the number of new medium-density dwellings delivered per annum has outstripped the number of high-density dwellings delivered.

This existing trend of subdivision of single residential lots for a small number of new dwellings – while it is gradually increasing density and will need to continue in some areas – ultimately may restrict residential development capacity. By developing new homes that are unlikely to be redeveloped over the next 30-40 years, it has the potential to reduce the opportunity for site consolidation that might support greater density in time. This development outcome may need to be curtailed through structure planning, particularly in the low-density residential areas closest to the station.

11.1.2 HOUSING DIVERSITY

Recommendation 4 - Support delivery of amenity in the Structure Plan Area to encourage residential development and support greater diversity of housing and the population.

Encouragement of greater residential development requires improvements to amenity locally. This includes new convenience retail facilities and services close to the station, enhancement of other commercial areas towards Burwood Village, and improved links through the area, particularly across Burwood Highway.

Recommendation 5 - Encourage development offer a diversity of medium and higher density housing typologies, including larger (family sized) apartments and affordable options.

The existing residents of the Burwood Structure Plan Area and surrounding suburbs are diverse, reflecting the appeal of the location to families with well-regarded schools and a younger population influenced by Deakin University. This diversity should be supported by facilitating future higher density housing that enables current and future residents to have access to suitable 'right sized' and affordable accommodation.

Over time, it is expected the housing market will respond to this diverse demand as observed in the case study precincts in Sydney and Brisbane identified in this report. Nonetheless, incentives could be considered.

This report has found an increasing misalignment between the market's supply and growing demand for larger apartments. A significant increase in three or more-bedroom high-density dwellings is needed to accommodate a broader range of groups. Providing a greater number of three or more-bedroom high-density homes could tap into a previously underexplored section of the market that is not currently catered for, which will help in increasing the growth rate of high-density apartments and accommodate population growth.

While noting the value of encouraging dwelling diversity that could support larger household types, it should be recognised that low-density housing will remain through large parts of the Structure Plan Area, albeit at higher costs than apartments.

Recommendation 6 - Ensure adequate open space, facilities and amenity are provided on site or in proximity to apartments to attract diverse household types.

To create attractive residential places, consideration should be given to matters beyond dwelling size and configuration. The Structure Plan should consider how more diversity of housing can be encouraged, without impacting flexibility for the private sector to develop in line with market demand at the time. This should include:

- Facilitating the provision of open space and other amenity or services within the Structure Plan Area to ensure living centrally in a high-density environment appeals to families (open space and community infrastructure needs are considered in other technical reports).
- Promoting development that supports family-friendly apartments through on-site amenity.

Recommendation 7 - Facilitate opportunities for a variety of residential types and development locations to attract a diverse range of developers and builders.

The construction capacity and appetite for development of residential developers through economic cycles is an important consideration. Housing growth is delivered across a spectrum from large developers (e.g. those delivering large residential towers) through to smaller builders or construction companies (e.g. townhouse and smaller apartment complex developers). Larger and smaller developers/builders tend to operate with separate workforces, and scale activity around market peaks and troughs.

The delivery of higher-density housing in the Burwood Structure Plan Area, which we expect will be predominantly mid-rise in most locations rather than the towers seen in other areas like Box Hill, will largely be delivered by smaller developers and builders. Providing opportunities across the Structure Plan Area for site amalgamation of 3-4 house lots will facilitate the necessary delivery of large numbers of mid-sized apartment complexes. Larger developers may find opportunities in select locations (e.g. close to the station, potentially along Burwood Highway).

Recommendation 8 - Encourage delivery of social and affordable housing in the Structure Plan Area.

This report has identified there is a sizeable need for affordable housing for those on very low, low, and moderate incomes. An estimated 630 households in 2041 will be technically eligible for affordable housing based on these income ranges and associated household composition criteria.

Although accessibility to public transport (train, tram, bus) will support the delivery of affordable housing in Burwood, there is a lack of retail and other services currently that appeal to those in need of affordable and social housing. This will likely lead to the concentration of social and affordable housing along the Burwood Highway corridor, where transport connections and amenity (near Burwood Village and likely around the station) combine.

Mechanisms to secure social and affordable housing provision within private housing developments should be explored. Intervention of some form is expected to be required to achieve growth in affordable housing provision. The market is unlikely to address the need. This will need to be done in such a way as to not undermine the viability of residential development in the area, as the delivery of more housing stock is also critical in addressing the housing crisis and affordability concerns.

Recommendation 9 - Support the delivery of other purpose-built housing types such as student accommodation and housing for elderly residents.

Given the presence of Deakin University, the Burwood Structure Plan Area can support a sizeable provision of purpose-built student accommodation. Existing student housing is provided on the Deakin campus and in the surrounding areas such as along Burwood Highway and Elgar Road within walking distance to the campus. However, the delivery of student housing will be driven by market demand. Private market operators are expected to respond to the identified need. Consequently, intervention is unlikely required. Nonetheless, the Structure Plan should allow for student housing type (typically mid-rise apartment complexes) close to the University and station.

The Burwood Structure Plan Area already provides aged care and retirement accommodation, with more in the pipeline. As the population grows and ages, market providers will seek to provide further facilities for the local population. However, the amenity in Burwood is not as attractive as nearby Box Hill which will attract more aged care/retirement development. Facilities in Burwood will generally be supported in residential areas, increasingly in higher-density type.

Deakin University as the key employment destination in Burwood does not attract large numbers of key workers relative to other SRL East locations such as Box Hill or Clayton. Consequently, the need for key worker housing in Burwood is moderate. Nonetheless, the opportunity for key worker housing should still be allowed for, particularly in areas around the station, to support those commuting to other areas nearby, such as Box Hill.

HOUSING LOCATIONS

Recommendation 10 - Facilitate high-density apartment development along the Burwood Highway and other key road corridors.

The Burwood Structure Plan Area currently has no major redevelopment sites. The key regional site has been Burwood Brickworks, located just outside the Structure Plan Area. The limited large-scale sites make significant housing development more challenging as density will be required to be delivered in large part through existing residential areas. Higher density will need to be encouraged in the right locations.

The corridor along the Burwood Highway is the obvious location for greater height in residential development, particularly through the commercial areas towards the western end of the Structure Plan Area. This would require a change in thinking on the mix of uses allowable.

Development in the commercial areas of Burwood Highway needs to be balanced with the need for local employment and the role of industrial precincts such as that existing in Burwood. The capacity of the area for residential and employment development will need to be considered.

Recommendation 11 - Plan for significant housing growth close to the Burwood SRL Station.

The station location could have a residential focus given the lack of employment activity currently south of the highway in this vicinity. This is one of the few locations where significant height may be supported. There may also be constraints on scale due to weight restrictions above the station, but density should be sought in adjoining areas also.

Recommendation 12 - Encourage lot consolidation around the Burwood SRL Station to facilitate density increase.

As discussed in Recommendation 3, there is a need to minimise sub-division producing a small number of new dwellings. With the station largely surrounded by low-density residential areas, intervention may be needed to allow transition of this land to support much higher density, including apartment buildings of greater scale. The site amalgamation to achieve this could take time, but if the opportunity is great enough, private developers will deliver greater scale and limit the lower-density new housing that is currently more common.

Recommendation 13 - Encourage housing types to support a diverse population across the Structure Plan Area, but particularly close to the station and Deakin University's Burwood Campus.

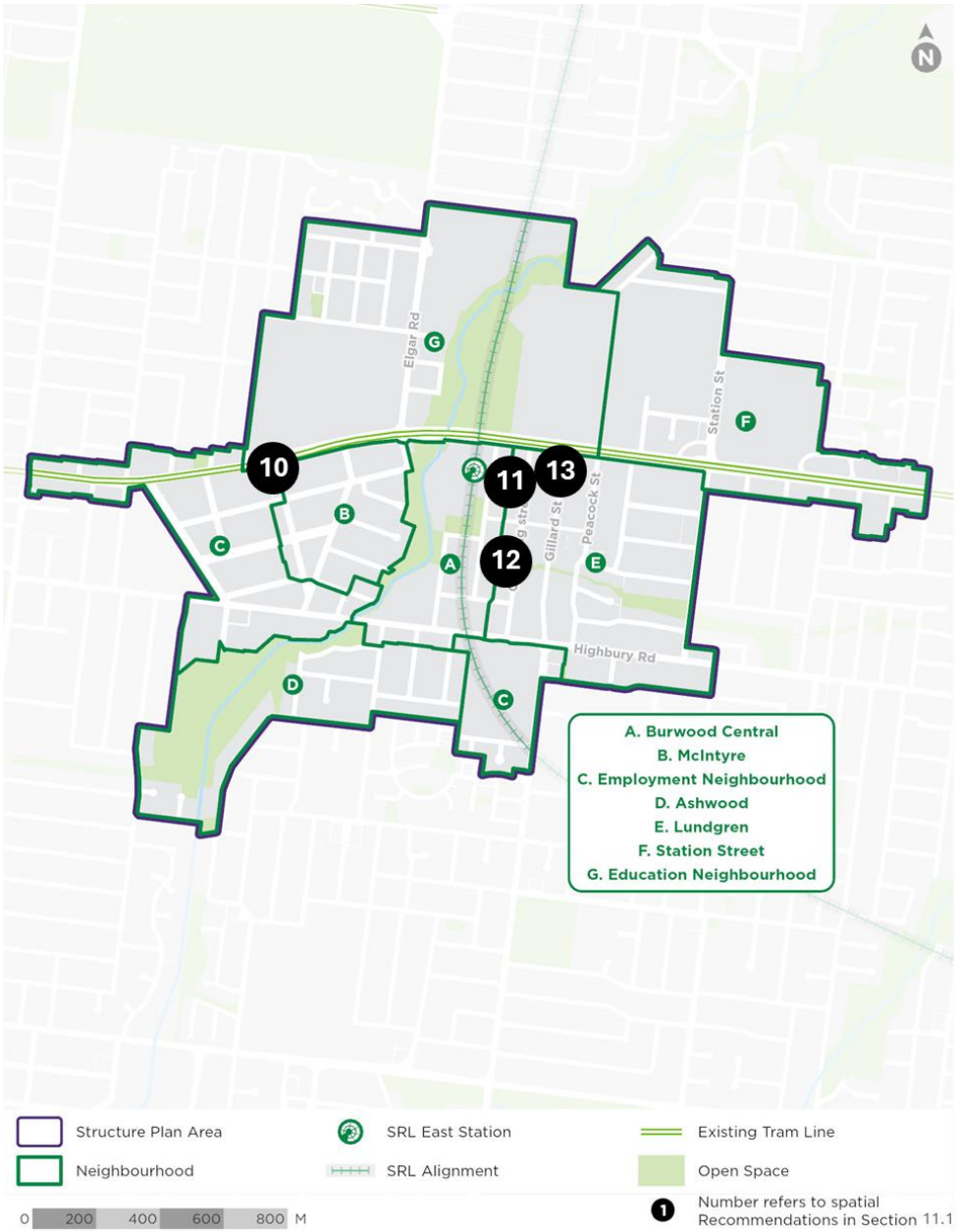
As previously identified, social and affordable housing and student accommodation in particular will be required to support a diverse demographic. This should be provided for throughout the Structure Plan Area. However, like other housing, there will be a weighting towards the station, along Burwood Highway and close to the university due to the amenity, employment opportunities and transport connections.

10 Facilitate high-density apartment development along the Burwood Highway and other key road corridors.

11 Plan for significant housing growth close to the Burwood SRL Station.

12 Encourage lot consolidation around the Burwood SRL Station to facilitate density increase.

13 Encourage housing types to support a diverse population across the Structure Plan Area, but particularly close to the station and Deakin University's Burwood Campus.



Only location-related recommendations are outlined on the map. Where a number does not reference a specific site, it indicates a general area rather than an exact location.

FIGURE 11.1 HOUSING DEVELOPMENT LOCATION CONSIDERATIONS, BURWOOD STRUCTURE PLAN AREA

11.2 Other opportunities

Although potentially beyond the scope of the Structure Plan development and supporting Planning Scheme Amendments, other opportunities to support the necessary housing development in Burwood include the following:

- **Opportunity 1** – Monitor the status of the Mount Scopus school site, as it could present an opportunity for larger scale and consolidated delivery of housing.

  We note the future status of the Mount Scopus site is unknown. While it is well suited to residential/mixed-use development and could deliver a large share of the required housing in one location, including a potential role for student housing, it cannot be relied upon to deliver residential growth at this stage. It may remain as an education or other employment use. The opportunity this site presents should be monitored over the life of the Structure Plan.

- **Opportunity 2** – Consider facilitating housing on surplus State Government land, particularly social and affordable housing in line with the Victorian Government's Housing Statement.

- **Opportunity 3** – Identify suitable planning provisions and potential priority project processes to support the faster approval of suitable and eligible priority housing development.

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Appendix A

Abbreviations, data sources and definitions

Abbreviations

TABLE A.1 ABBREVIATIONS

ABS	Australian Bureau of Statistics
AHURI	Australian Housing and Urban Research Institute Limited
AIHW	Australian Institute of Health and Welfare
ASD	Adjacent-to station development
BIC	Business and Investment Case (BIC) for SRL
BTR	Build-to-Rent
CBD	Central Business District
DEECA	Department of Energy, Environment and Climate Action
DJSIR	Department of Jobs, Skills, Industry and Regions
DTP	Department of Transport and Planning
ERP	Estimated Resident Population
FAR	Floor area ratio
FES	Floorspace Employment Survey
GBA	Gross Building Area
GFA	Gross Floor Area
GLA	Gross lettable Area
HA	Hectare
ILU	Independent Living Units
IRSAD	Index of Relative Socio-Economic Advantage and Disadvantage
LGA	Local Government Area
MAC	Metropolitan Activity Centre
NEIC	National Employment and Innovation Clusters
NLA	Net lettable area
OSD	Over-station development
PBSA	Purpose-Built Student Accommodation
RAC	Residential Aged Care
SEIFA	Socio-Economic Indexes for Areas
SP	Structure Plan
sq.m	Square metres
SRL	Suburban Rail Loop
SRLA	Suburban Rail Loop Authority
TOD	Transit-orientated Development
TOP	Transit-orientated Precinct
VCAT	Victorian Civil and Administrative Tribunal
VIF	Victoria in Future
VITM	Victorian Integrated Transport Mode
VPP	Victoria Planning Provisions

Additional data sources

Along with the key data sources, the analysis also incorporated the following additional data sources:

- **Census of Population and Housing**, 2006, 2011, 2016 and 2021, Australian Bureau of Statistics (ABS).
  - » Census data is available for standard ABS geographies such as Statistical Areas (1/2/3/4) and Local Government Areas (LGAs).
- Land use projections generated as part of the **Business and Investment Case (BIC) for SRL**, 2021, KPMG (on behalf of the Victorian Government)
  - » Land use projections (including demographic, employment and enrolment estimates) included in the SRL BIC are derived from the CityPlan model.
  - » CityPlan is a strategic scale Land Use Transport Interaction (LUTI) model that is used to estimate the broad land use impacts of major transport and precinct initiatives. It was developed by KPMG on behalf of the Victorian Government Department of Transport and Planning (DTP).
  - » CityPlan's geographic scope is confined to Victoria, with a focus on metropolitan Melbourne and surrounding settlements. In this

instance, CityPlan has been used to redistribute the base population and employment distribution based on the SRL transport and other related SRL precinct initiatives. These redistribution effects have been contained within the total Victorian population projects, with the majority of movements contained within metropolitan Melbourne.

  - The CityPlan model uses a range of data. Some of the data is publicly available and some is internal to the Victorian Government.
  - The version of CityPlan used for the SRL BIC was Version 1.1.1. Key inputs into CityPlan Version 1.1.1 include:
    - SALUP19 based on Department of Environment, Land, Water and Planning (DELWP) Projections 2018 (Unpublished)
    - ABS Census 2016
    - Victorian Planning Authority (VPA) potential development capacities
    - Data is reported at the Travel Zone, SA2, SA3 and LGA level.
    - For an introduction to CityPlan, in the context of the SRL, see the SRL Business and Investment Case available from: https://bigbuild.vic.gov.au/library/suburban-rail-loop/business-and-investment-case

- **Urbis Apartment Essentials** tracks all off-the-plan apartment developments (25 units or more) across capital city markets in Australia. It tracks key metrics such as the number of dwellings, sale price, internal areas etc.
- **Urbis Student Accommodation Benchmarks** refers to Urbis' in-house compilation of student accommodation data, including supply and propensity to access purpose-built student accommodation.
- **Pricefinder** is a provider of up-to-date property transaction data. It provides comprehensive data on every property in Australia. AJM JV utilise Pricefinder data for residential pricing trends.
- **RP Data** is a product maintained by Core Logic that provides detailed property data for all of Australia.
- A **floorspace audit** was caried out to identify and categorise employment land in the Structure Plan Area. This process included review of a number of data sources (such as DEECA, PSMA and Space Syntax) to understand, for each building, the existing land use and estimate the amount of floorspace. This data set provided a baseline for internal area estimates and internal area to GBA conversion factors.

Additional definitions

Further to the key definitions, the following additional definitions are used in this report:

Population

Total population is defined as the Estimated Resident Population (ERP).

CityPlan projections segment the total population into broad age ranges - 0 to 4, 5 to 11, 12 to 17, 18 to 25, 26 to 64, and 65 and over. Note for modelling purposes these CityPlan segments are used. For other demographic analysis, standard age brackets with a five-year interval are used.

Private and non-private dwellings

People typically resident in two broad dwelling forms which are defined based on ABS definitions:

- Structural private dwellings in which individual households occupy self-contained dwellings that do not share bathrooms, kitchens or similar.
- Non-private dwellings as defined by the ABS include student accommodation, aged care facilities and various other dormitory style or not self-contained housing forms.

Due to data collection limitations of the ABS around 99% of dwellings are classified as private dwellings. This means that for Monash most of the student accommodation are considered private dwellings. Therefore, throughout the report we consider all forms of diverse accommodation to be a subset of the private dwelling requirement.

This distinction refers to the living arrangements in dwellings rather than their ownership, and so social housing, while mostly owned by the government, would be defined as a private dwelling.

Dwelling requirements in this report refer to private dwellings, unless otherwise stated.

Household types (within private dwellings)

The ABS definition of household types is used in this report:

- **Couple family with children** means a family with two adults and one or more children.
- **Couple family without children** means a couple in a relationship without children. This includes both young couples and older couples whose children may have moved out.
- **One parent family** means one parent living with one or more children.
- **Other family** include other kinds of households containing related people living together, such as siblings living together.
- **Multi-family household** means two or more families (from the categories above) living together in the same dwelling.
- **Lone person household** means a single person living by themselves.
- **Group household** means two or more unrelated people living together, for example, a shared house.
- **Other non-classifiable household** means a household which does not fall into the above categories, or for which insufficient information was available in the ABS census to accurately categorise the household.

Build-To-Rent (BTR)

BTR is a term used to describe residential developments that are designed and built specifically for renting rather than for sale. These properties are typically owned by institutional investors and managed by professional property management companies.

Diverse housing

Affordable housing

- The Victorian State Government has introduced a definition of affordable housing to the Planning and Environment Act 1987 being 'housing that is appropriate to the needs of very low, low, and moderate-income households'.[38]
- A Governor in Council Order forms part of the definition of affordable housing under the Act. The Order specifies the income ranges for very low, low and moderate-income households for affordable housing. The Order is published in the Government Gazette and updated annually to specify affordable housing income ranges.
- This analysis only includes renters in rental distress, defined as 30% or more of their income going towards rental payments.

Social housing

- Social housing is a subset of affordable housing. Social housing includes both public housing and community housing and generally involves some degree of subsidy. Public housing refers to properties owned and administered by the government (Homes Victoria), while community housing pertains to properties owned or managed by community housing providers.

Homelessness

- ABS categorises homeless individuals across operational groups. For the purpose of this report, homeless persons encompass those within the following operational groups: persons living in improvised dwellings, tents

38 Planning and Environment Act (1987) SECT3AA Meaning of affordable housing (austlii.edu.au)

or sleeping out; persons in supported accommodation; persons temporarily staying with other households; persons living in boarding houses; persons in other temporary lodgings; and persons living in severely crowded dwellings.

Student accommodation

- Student accommodation is defined as accommodation specifically built for and to cater towards students enrolled at an institution of tertiary education. This is otherwise known as Purpose-Built Student Accommodation (PBSA). Student accommodation is inclusive of student halls and privately built apartments specifically designed to cater towards students.
- Urbis Student Accommodation Benchmarks refers to Urbis' in-house compilation of student accommodation data. This report provides data on the supply of student accommodation facilities and student propensities to reside in PBSA.

Key worker housing

- Key workers are generally defined as people who provide essential services to the community. They are unable to work from home and often work outside of traditional business hours. The analysis in this report focuses on key workers earning very low to moderate incomes. Key workers living in the Structure Plan Area are a subset of the social and affordable housing eligibility calculations, allow those living outside that area are a separate cohort.

Retirement living and aged care

- Retirement included two types of diverse housing accommodation. Independent Living Units (ILUs) are those targeted at over 65's which offer a more communal form of living for elderly people. There is no medical support provided as part of this accommodation.
- Aged Care, otherwise known as Residential Aged Care (RAC), refers to accommodation that provides round-the-clock medical support for elderly residents. Residents of these facilities require medical support.

Methods of floor area measurement

- **Gross Building Area** (GBA) refers to the total floorspace of a building including stairs, hallways, plant etc.
- Note that the figures are Gross Building Area (GBA) as the floorspace audit was undertaken using external building information, no common spaces or otherwise unleasable spaces have been removed from the building extents.
- **Gross Floor Area** (GFA) is the total area of all floors in a building, measured from the exterior walls. It generally excludes stairs and plant area.
- **Gross Leasable Area** (GLA) focuses on the portion of space available for lease to tenants, typically excluding common areas and utility spaces.

Industry classification

- The following Australian and New Zealand Standard Industrial Classification (ANZSIC) Divisions make up the combined industry classifications used in key worker analysis:
  - **Health:** Health Care and Social Assistance.
  - **Education:** Education and Training.
  - **Other:** Information Media and Telecommunications; Financial and Insurance Services; Rental, Hiring and Real Estate Services; Professional, Scientific and Technical Services; Administrative and Support Services; Public Administration and Safety; Construction; Retail Trade; Accommodation and Food Services, Arts and Recreation Services; Other Services; Agriculture, Forestry and Fishing; Mining; Manufacturing; Electricity, Gas, Water and Waste; Wholesale Trade; Transport, Postal and Warehousing.

Occupation classification

- **White collar occupations:** Managers; Professionals; Community and Personal Service Workers; Clerical and Administrative Workers; Sales Workers.
- **Blue collar occupations:** Technicians and Trades Workers; Machinery Operators and Drivers; Labourers.

Appendix B

Assumptions and limitations

Assumptions

Additional assumptions related to this analysis or the data sources are:

- The modelling anticipates there are no constraints on the construction industry, and all necessary dwellings required are realised.
- Average internal floor areas for residential dwellings (by type and number of bedrooms) to remain constant over the time period. This is assumed because there are no clear trends when assessing internal floor areas, so they have been kept constant.
- Internal floor areas to Gross Building Area (GBA) are assumed to remain constant over the time period.
- Household sizes for residential dwellings (by type and number of bedrooms) to remain constant over the time period. While projections predict a small decline in household sizes across Greater Melbourne, this decrease is expected to be witnessed in the SRL East Structure Plan Areas with a shift from low-density to high-density dwellings.
- Overall, it is assumed there will be no net increase in low-density dwellings in the Structure Plan Area from 2022. Old low-density dwellings may still be demolished and replaced with new low-density dwellings.
- Social and Affordable Housing are based on data collected at the 2021 Census. While the underlying determinants of Social and Affordable housing may change (e.g. increasing rents leading to more households in rental distress), these changes are not factored into our modelling.
- The proportion of people experiencing homelessness remains constant over time, sustaining the levels observed in the year 2021.
- There will be no changes to the propensities for retirement living.
- The proportion of key workers within each industry remains consistent over time, maintaining the same levels observed in the year 2021.
- The modelling assumes incudes a vacancy factor of 5% for the 2021 modelled estimates. After addition of the vacancy factor the 2041 modelled estimates are equivalent to the 2021 dwellings which includes vacant dwellings.

Limitations

Additional limitations associated with this analysis or data sources are:

- **Census data:** The 2021 Census was conducted at an unusual time with much of Australia's eastern seaboard subject to COVID-19 restrictions, prompting caution when interpreting certain results, especially regarding data on place of employment. Census data is also subject to random perturbation to protect the confidentiality of individuals. These adjustments result in small introduced random errors when analysing more finely classified data. Changes to data management and collection methods across Census periods can also impact the use of a few datasets especially when used at a small geographic level or over time.
- **Spatial misalignment:** Numerous situations arise where the geographic units of one type intersect with the boundaries of another type in inconsistent ways. For example, the Structure Plan Areas do not perfectly align with SA1s (the principal geography from that Census data is extracted from). AJM JV and SRLA have agreed on specific methods for apportioning geographic data. However, apportioning can result in some inaccuracy in the allocation of data for the area sought to approximate.
- **Use of benchmark data:** SRL East will deliver a step change in housing demand preferences. Recent trends within local areas will not prevail in the future as population growth and density are vastly different to what these precincts would look like without SRL. To account for this, the current profile of select case study precincts has been used to determine housing preferences in the Structure Plan Area in the future. While benchmarks provide valuable insights, they are not perfect indicators of the future due to variations across different areas including local planning policy.
- **CityPlan projections included in the SRL Business and Investment Case**: The projections are strategic and should be considered indicative, particularly at the small area level. Since the projections were prepared, some material events have occurred, impacting population and employment growth and to some extent, typical behaviours of households and businesses. These include COVID-19, lower population growth, a shift in user preference to working from home, and updates to staging of competing and complementary projects.

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Appendix C

Demographic data

TABLE C.1 DEMOGRAPHICS, BURWOOD, 2011 & 2021

	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE
	2011	2011	2011	2021	2021	2021
Income						
Per capita Income	$28,972	$40,607	$34,200	$46,260	$48,471	$46,017
Average household income	$67,717	$88,874	$85,326	$108,699	$127,711	$119,232
Age profile						
% 0-14 years	12%	17%	18%	11%	16%	18%
% 15-24 years	29%	14%	14%	27%	13%	12%
% 25-39 years	21%	21%	23%	28%	21%	24%
% 40-54 years	15%	21%	21%	15%	20%	20%
% 55-65 years	7%	11%	11%	7%	12%	11%
% 65+ years	15%	16%	13%	12%	18%	15%
Household type*						
Couple family no children	19%	24%	23%	20%	24%	23%
Couple family with children	23%	34%	33%	24%	33%	32%
One parent family	9%	9%	10%	10%	9%	10%
Other family households	3%	3%	3%	3%	2%	2%
Lone person household	29%	23%	22%	26%	25%	24%
Group household	14%	4%	4%	12%	4%	4%
Other	4%	3%	4%	4%	3%	4%
Dwelling density*						
Low-density	74%	69%	73%	57%	61%	66%
Medium-density	24%	29%	12%	34%	27%	22%
High-density	2%	2%	15%	10%	11%	13%
Housing tenure*						
Owned outright	37%	31%	26%	29%	36%	30%
Owned with a mortgage	24%	27%	29%	27%	34%	38%
Total Rented	37%	21%	21%	41%	29%	30%

	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE	STRUCTURE PLAN AREA	SOUTH EAST REGION	GREATER MELBOURNE
	2011	2011	2011	2021	2021	2021
Rented: Real estate agent	19%	14%	14%	29%	22%	23%
Rented: Person not in same household	12%	4%	4%	7%	4%	4%
Rented: State or territory housing authority	5%	2%	2%	4%	1%	2%
Rented: Community housing provider	0%	0%	0%	1%	0%	0%
Rented: Landlord type not stated	0%	0%	0%	0%	0%	0%
Rented: Other landlord type	1%	0%	1%	1%	0%	0%
Other tenure type	1%	0%	1%	3%	2%	2%
Other metrics:						
Household size	2.5	2.5	2.6	2.4	2.4	2.4
% Overseas-born	48%	36%	37%	52%	39%	37%
% White collar workers	79%	77%	72%	79%	79%	74%
% Blue collar workers	21%	23%	28%	21%	21%	26%

**Excludes non-private dwellings and other private dwellings. Source: ABS Census of Population and Housing 2021; AJM JV*

TABLE C.2 DEMOGRAPHIC CHANGE, BURWOOD, 2011 & 2021

	CHANGE	STRUCTURE PLAN AREA	STRUCTURE PLAN AREA	GREATER MELBOURNE	GREATER MELBOURNE	STRUCTURE PLAN AREA	GREATER MELBOURNE	VARIATION FROM GREATER MELBOURNE
		2011	2021	2011	2021	2011-2021	2011-2021	2011-2021
Income								
Per capita Income	%	$28,972	$46,260	$34,200	$46,017	60%	35%	25%
Average household income	%	$67,717	$108,699	$85,326	$119,232	61%	40%	21%
Age profile								
% 0-14 years	% point	12%	11%	18%	18%	-1%	0%	-1%
% 15-24 years	% point	29%	27%	14%	12%	-2%	-2%	-1%
% 25-39 years	% point	21%	28%	23%	24%	6%	1%	5%
% 40-54 years	% point	15%	15%	21%	20%	0%	-1%	1%
% 55-65 years	% point	7%	7%	11%	11%	0%	0%	0%
% 65+ years	% point	15%	12%	13%	15%	-3%	2%	-4%
Household type								
Couple family no children	% point	19%	20%	23%	23%	2%	0%	2%
Couple family with children	% point	23%	24%	33%	32%	1%	-1%	2%
One parent family	% point	9%	10%	10%	10%	1%	0%	2%
Other family	% point	3%	3%	3%	3%	0%	0%	0%
Lone person	% point	29%	26%	22%	24%	-3%	1%	-4%
Group household	% point	14%	12%	4%	4%	-1%	0%	-1%
Other	% point	4%	4%	4%	4%	0%	0%	0%
Dwelling density*								
Low-density	% point	74%	57%	73%	66%	-18%	-7%	-10%
Medium-density	% point	24%	34%	12%	22%	10%	10%	0%
High-density	% point	2%	10%	15%	13%	8%	-3%	10%
Housing tenure*								
Owned outright	% point	37%	29%	34%	30%	-9%	-3%	-5%
Owned with a mortgage	% point	24%	27%	38%	38%	3%	0%	3%

	CHANGE	STRUCTURE PLAN AREA	STRUCTURE PLAN AREA	GREATER MELBOURNE	GREATER MELBOURNE	STRUCTURE PLAN AREA	GREATER MELBOURNE	VARIATION FROM GREATER MELBOURNE
		2011	2021	2011	2021	2011-2021	2011-2021	2011-2021
Rented	% point	37%	41%	28%	30%	4%	2%	2%
Other metrics								
Household size	People per dwelling	2.5	2.4	2.6	2.4	-0.1	-0.2	0.1
% Overseas-born	% point	48%	52%	37%	37%	4%	0%	4%
% White collar workers	% point	79%	79%	72%	79%	0%	6%	-6%
% Blue collar workers	% point	21%	21%	28%	21%	0%	-6%	6%

**Excludes non-private dwellings and other private dwellings. Source: ABS Census of Population and Housing 2021; AJM JV*

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Appendix D

Case studies

Case study candidates and indicators

Case studies were used to derive key housing parameters. A total 34 case study precincts were selected based on a mapping analysis (of population densities / train station proximity) and professional knowledge. Table D.1 provides a list of the precincts reviewed. Table D.2 provides the list of factors and their weightings that were used for the similarity search and ranking exercise in Section 7.

TABLE D.1 CANDIDATE CASE STUDY PRECINCTS

PRECINCT	CITY
St Leonards Station	Sydney
Chatswood Station	Sydney
Epping Metro Station	Sydney
Rhodes Station	Sydney
Liverpool Station	Sydney
Bankstown Station	Sydney
Wolli Creek Station	Sydney
Rockdale Station	Sydney
Kogarah Station	Sydney
Hurstville Station	Sydney
Green Square Station	Sydney
Mascot Station	Sydney
Bondi Junction Station	Sydney
Burwood Station	Sydney
Strathfield Station	Sydney
Flemington Station	Sydney
Wentworthville Station	Sydney

PRECINCT	CITY
Lidcombe Station	Sydney
Auburn Station	Sydney
Parramatta Station	Sydney
Macquarie Uni. Metro Station	Sydney
North Ryde Metro Station	Sydney
Dulwich Grove Light Rail	Sydney
Indooroopilly Station	Brisbane
Toowong Station	Brisbane
Westend	Brisbane
Newstead	Brisbane
Kelvin Grove	Brisbane
Chermside	Brisbane
Nundah Station	Brisbane
Lutwyche	Brisbane
Coorparoo	Brisbane
Belconnen	Canberra
Canberra South Station	Canberra

Source: ***AJM JV***

TABLE D.2 BUILT-FORM AND HOUSING INDICATORS USED IN SIMILARITY SEARCH

INDICATOR	DESCRIPTION	WEIGHTING (%)	RATIONALE
Train station	Is there a local train/metro or light rail station?	5%	Prioritises case studies with similar modes of infill development (TOD).
Density (prior to development)	The past ('starting point') precinct population density – prior to development.	10%	Prioritises case studies with similar past population densities.
Density (post development)	The future ('end point') precinct population density – post development.	20%	Prioritises case studies with similar future population densities.
Neighbourhood density (prior)	The past ('starting point') neighbourhood population density (local government area)	10%	Prioritises case studies with similar surrounding urban tissue – for example, inner city or suburban.
CBD distance	The CBD distance, measured through public transport travel time.	15%	Prioritises case studies with similar distances to CBD.
SEIFA (IRSAD) (prior)	The past socioeconomic levels of the precinct population – prior to development.	10%	Prioritises case studies with similar affluence and living arrangements.
Overseas born (prior)	The past proportion of overseas born population.	5%	Prioritises case studies with similar share of population more likely to live in and support high-density living arrangements.
Office employment (post)	The future quantum of office jobs.	10%	Prioritises case studies with similar quantum of office jobs.
University	Is there is a university within a 1600-metre radius?	5%	Prioritises case studies in proximity to university (and likely higher proportion of student accommodation).
Hospital	Is there a hospital within a 1600-metre radius?	5%	Prioritises case studies in proximity to hospital (and likely higher proportion of key worker housing).
Industrial (prior)	Was the case study precinct previously an industrial area?	5%	Prioritises case studies with similar past urban morphology. Rezoned industrial areas provide more flexibility in terms of future residential.

Source: AJM JV

Case study summaries

The following pages outline the demographics for the three selected case studies. It provides insight into the urban trends experienced and that are influencing our modelling of the Burwood Structure Plan Area.

EPPING METRO STATION 1600-M RADIUS AREA

Epping Metro Station is accompanied by a small retail strip and a variety of education centre, including early learning, K-12 schools and vocational education providers. It is linked to the main train network and the M1 Metro line. Growth in employment has largely been in health, education and knowledge-intensive industries over the past 5-10 years.

Table D.3 outlines key changes within the case study area from 2011–2021. Table D.4, Figure D.1 and Table D.5 outline key demographic and housing trends in the area.

TABLE D.3 KEY CHANGES IN EPPING METRO STATION 1600-M RADIUS AREA

	KEY CHANGES	IMPLICATIONS
Changes in age structure	Significant drop in share of both 15–29-year-olds and 45–64-year-olds. Increase in 0-14- and 30–44-year-olds, implying more families.	Greater demand for dwellings that cater for families
Change in household structure	Increase in couples without children. Slight drop in lone person households. Couples with families remains the largest cohort.	Steady demand for family housing.
Change in house and unit prices	Houses and unit prices growing slower than Greater Sydney median.	Units in the area are comparatively affordable.

Source: AJM; ABS (2011 & 2021) Census of Population and Housing; Pricefinder

TABLE D.4 HOUSEHOLD STRUCTURE, EPPING METRO STATION 1600-M RADIUS AREA, 2011-2021

	EPPING STATION - 2011	EPPING STATION - 2021	% PT CHANGE (2011-2021)
Couple family without children	21.7%	23.4%	1.7%
Couple family with children	42.0%	40.5%	-1.4%
Other family	9.7%	9.8%	0.0%
Multi family	2.4%	3.1%	0.7%
Lone person household	18.4%	16.8%	-1.6%
Group household	3.5%	4.0%	0.5%
Other	2.3%	2.5%	0.2%
Total	**100.0%**	**100.0%**	

Source: ABS (2011 & 2021) Census of Population and Housing

FIGURE D.1 AGE STRUCTURE, EPPING METRO STATION 1600-M RADIUS AREA, 2011 AND 2021

Source: ABS (2011 & 2021) Census of Population and Housing

TABLE D.5 MEDIAN UNITS AND HOUSE PRICES, EPPING (SUBURB), 2014-2023

	2014	2023	PRICE CHANGE (NO.)	TOTAL GROWTH (%)	ANNUAL GROWTH RATE (2014-2023)
Median unit price ($)					
Epping	$738,000	$770,000	$32,000	**4.3%**	**0.5%**
Greater Sydney	$622,000	$777,500	$155,500	**25.0%**	**2.8%**
Median house price ($)					
Epping	$1,373,885	$2,400,000	$1,026,115	**74.7%**	**8.3%**
Greater Sydney	$739,000	$1,340,000	$601,000	**81.3%**	**9.0%**

Source: Pricefinder

Epping Planning Review

The City of Parramatta has identified community concern in relation to traffic congestion, heritage conservation, loss of commercial floor space and provision of open space and community facilities. These points are being addressed through planning proposals which aim to reduce impact on heritage sites and the development of a new library. It should also be noted that an attempt to increase commercial floorspace was not supported by NSW Department of Planning and Environment in 2021. The Council is reviewing its options in this regard.

LIDCOMBE STATION 1600-M RADIUS AREA

Lidcombe is located in Western Sydney. The station is located next to a large retail presence and strong food catering offer. There are a number of schools positioned north of the station as well as an aged-care facility. Four train lines run through Lidcombe station making it accessible from the East, West and South via rail.

Table D.6 outlines key changes within the case study area from 2011–2021. Table D.7, Figure D.2 and Table D.8 outline key demographic and housing trends in the area.

TABLE D.6 KEY CHANGES IN LIDCOMBE 1600-M RADIUS AREA

	KEY CHANGES	IMPLICATIONS
Changes in age structure	Decreases in children imply a drop in number of families. Growth in 30-44 year olds, who are now the largest bracket.	Greater Demand for 1- & two-bedroom units that cater towards childless couples and singles.
Change in household structure	Large shift away from families and towards couples and singles without children.	Greater demand for 1 bedroom and studio catering towards lone person households. Greater demand for two-bedroom units
Change in house and unit prices	House and unit price growth lower than Greater Sydney between 2011–24)	Lidcombe becoming a relatively more affordable location, compared to the Greater Sydney region.

Source: AJM JV; ABS (2011 & 2021) Census of Population and Housing; Pricefinder

TABLE D.3 HOUSEHOLD STRUCTURE, LIDCOMBE STATION 1600-M, 2011-2021

	LIDCOMBE - 2011	LIDCOMBE - 2021	% PT CHANGE (2011-2021)
Couple family without children	18.0%	22.3%	4.2%
Couple family with children	38.6%	32.3%	-6.3%
Other family	13.9%	12.5%	-1.4%
Multi family	4.7%	4.8%	0.1%
Lone person household	15.9%	16.2%	0.2%
Group household	4.4%	7.7%	3.4%
Other	4.4%	4.2%	-0.2%
Total	**100.0%**	**100.0%**	

Source: ABS (2011 & 2021) Census of Population and Housing

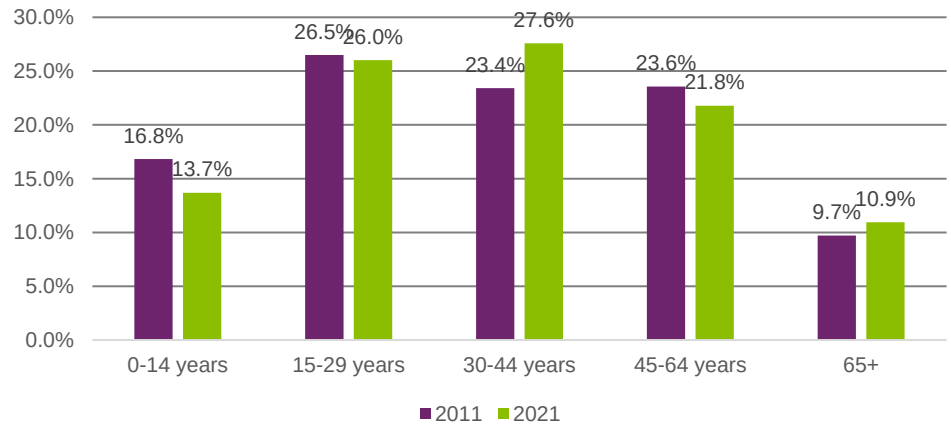

FIGURE D.2 AGE STRUCTURE, LIDCOMBE STATION 1600-M RADIUS AREA, 2011 AND 2021

Source: ABS (2011 & 2021) Census of Population and Housing

TABLE D.8 MEDIAN UNITS AND HOUSE PRICES, LIDCOMBE (SUBURB), 2014-2023

	2014	2023	PRICE CHANGE (NO.)	TOTAL GROWTH (%)	ANNUAL GROWTH RATE (2014-2023)
Median unit prices ($)					
Lidcombe	$605,000	$745,000	$140,000	**23.1%**	**2.6%**
Greater Sydney	$622,000	$777,500	$155,500	**25.0%**	**2.8%**
Median house price ($)					
Lidcombe	$910,000	$1,477,500	$567,500	**62.4%**	**6.9%**
Greater Sydney	$739,000	$1,340,000	$601,000	**81.3%**	**9.0%**

Source: Pricefinder

Cumberland Local Strategic Planning Statement (LSPS) 2020

The LSPS sets out Council's 10-year vision for land use planning in Lidcombe. Opportunities identified by the Council include transitioning the industry-only north of the Station to include more knowledge-intensive land uses; introduction of artisan industry to boost tourism; investigate a potential site for a new high school; and investigate multi-modal access to Lidcombe Station.

KELVIN GROVE 1600-M RADIUS AREA

Kelvin Grove is divided between the dense student living block surrounding Queensland University of Technology's Kelvin Grove Campus and a large swathe of detached dwellings. South of the campus sits a bus interchange and further are the Roma Street and Milton rail stations.

Table D.9 outlines key changes within the case study area from 2011–2021. Table D.10, Figure D.3 and Table D.11 outline key demographic and housing trends in the area.

TABLE D.9 KEY CHANGES IN KELVIN GROVE 1600-M RADIUS AREA

	KEY CHANGES	IMPLICATIONS
Changes in age structure	Age profile is largely static due to the large amount of students in the area.	Continued demand for student accommodation.
Change in household structure	Lone households and couples without children are the largest cohort and are both growing.	Continued demand for 1 & 2 Bedroom dwellings.
Change in house and unit prices	Much lower growth in units than the Greater Brisbane median, due to large amount of student accommodation in the area. Stronger growth in house prices.	Continued demand for student accommodation.

Source: AJM JV; ABS (2011 & 2021) Census of Population and Housing; Pricefinder

TABLE D.10 HOUSEHOLD STRUCTURE, KELVIN GROVE 1600-M RADIUS AREA, 2011-2021

	KELVIN GROVE - 2011	KELVIN GROVE - 2021	% PT CHANGE (2011-2021)
Couple family without children	21.9%	23.2%	1.3%
Couple family with children	16.3%	18.5%	2.2%
Other family	7.9%	8.4%	0.5%
Multi family	0.4%	0.4%	0.0%
Lone person household	28.3%	30.2%	1.9%
Group household	15.6%	14.3%	-1.3%
Other	9.6%	5.0%	-4.6%
Total	**100.0%**	**100.0%**	

Source: ABS (2011 & 2021) Census of Population and Housing

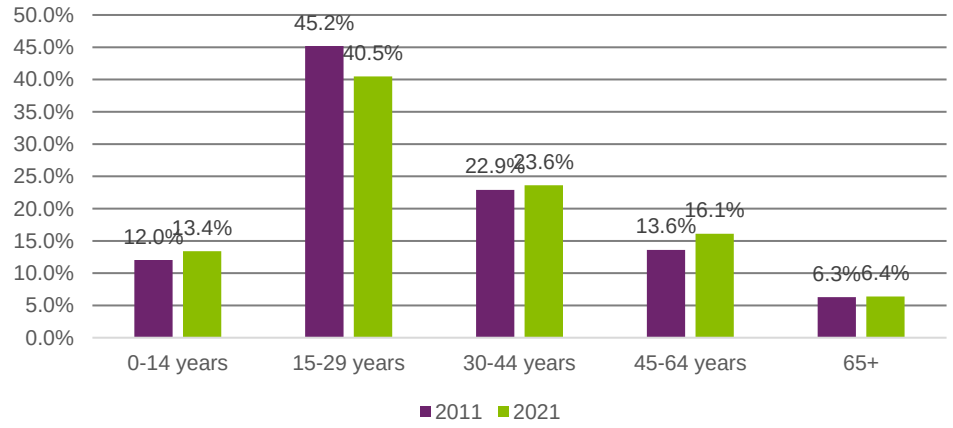

FIGURE D.3 AGE STRUCTURE, KELVIN GROVE 1600-M RADIUS AREA, 2011 AND 2021

Source: ABS (2011 & 2021) Census of Population and Housing

TABLE D.11 MEDIAN UNITS AND HOUSE PRICES, KELVIN GROVE (SUBURB), 2014-2023

	2014	2023	PRICE CHANGE (NO.)	TOTAL GROWTH (%)	ANNUAL GROWTH RATE (2014-2023)
Median unit prices ($)					
Kelvin Grove	$462,000	$490,000	$28,000	**6.1%**	**0.7%**
Greater Brisbane	$422,500	$520,000	$97,500	**23.1%**	**2.6%**
Median house price ($)					
Kelvin Grove	$676,475	$1,256,000	$579,525	**85.7%**	**9.5%**
Greater Brisbane	$501,000	$830,000	$329,000	**65.7%**	**7.3%**

Source: Pricefinder

Kelvin Grove Urban Village Neighbourhood Plan

As detailed in the Brisbane City Plan 2014, Kelvin Grove is planned to remain an education focussed hub with complementary community, recreation, service industry, knowledge-intensive industry and health land uses. The Plan details the need for apartments and affordable housing within the village to accommodate students.

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Appendix E

Housing requirements methodology

Housing requirements – detailed methodology

1600-METRE RADIUS AREA

A key component of modelling housing requirements for the Structure Plan Area is understanding and comparing the growth and development of comparable Transit Oriented Precincts (TOPs) as referenced by the case studies.

As part of the case study analyses, a radius of 1600-metre from each case study train station (or equivalent) and each SRL station was defined. The modelling uses the 1600-metre radius area as an intermediary step to model the Structure Plan Area.

A 1600-metre radius was used for the following reasons:

- **Data availability:** Many important datasets for analysis are unavailable when look at the Structure Plan Area as this required extracting data at the Mesh Block area (the smallest geography used by the ABS).
- **Lack of comparability:** Structure Plan Areas are drawn specifically around each SRL East station as the area to be specifically planned for. Each Structure Plan Area has a different extent depending on specific local circumstances. Rather than relying on arbitrary estimations of equivalent 'structure plan' boundaries within the case study areas, adopting a consistent study area based on distance enables more meaningful comparisons.

MODELLING HOUSING REQUIREMENTS FOR THE STRUCTURE PLAN AREA

The following provides a detailed breakdown of the two components of modelling housing requirements for the Structure Plan Area. The case study assessment steps are numbers while the Structure Plan Area modelling steps are lettered.

Case Study assessment:

7) Scoring and comparison of 34 case study locations around Australia was undertaken. The case studies assessed are in Table D.1. The case studies were assessed on a range of factors related to population densification, infrastructure, and other factors. Each factor was given a different weighting when applied to the respective Structure Plan Area, based on the unique characteristics of each area and a view as to which case study was most comparable. The relevant factors and weightings applied are shown in Table D.2.

8) Based on the results of the scoring, that is, which case studies were most comparable to the Structure Plan Area, and professional knowledge, three comparable case studies were chosen for the Structure Plan Area modelling. Each case study is then assigned a different weighting, based on the degree of comparability, with the most comparable being given a weighting of 0.5, the second most a weighting of 0.3 and the third most 0.2. The weightings are applied to the dwelling structure data for each case study which is in turn applied to the population forecasts.

Structure Plan Area modelling:

The lettered steps in Figure E.1 below outline a detailed step by step methodology for the Structure Plan Housing Requirements. Note steps and inputs A to N relate to the 1600-metre radius area, with steps beyond that deriving Structure Plan estimates:

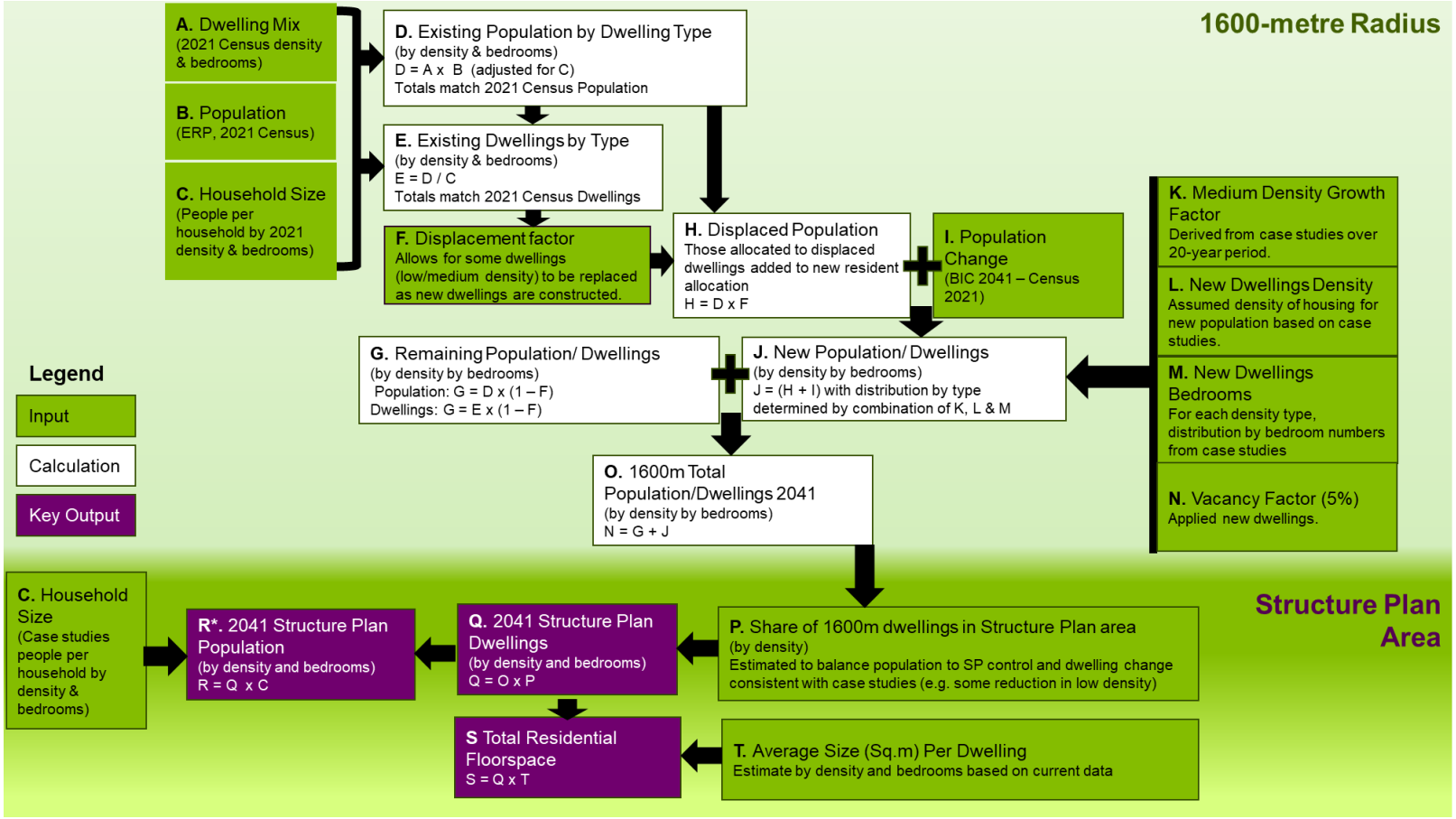

FIGURE E.1 HOUSING REQUIREMENTS METHODOLOGY DIAGRAM

Source: AJM JV

(A) The current dwelling mix (share rather than absolute number) within the 1600-metre radius area is extracted from the 2021 Census data with all dwellings split by density (high/medium/low) and bedroom numbers (studio/1/2/3/4+).

(B) The 2021 population and dwellings by structure within the 1600-metre area and Structure Plan Area are extracted from the 2021 Census.

(C) The household size (people per household) for 2021 in the 1600-metre radius is derived based on case study evidence.

(D) Population is allocated to a dwelling structure by apply household sizes to dwelling structure estimates then calibrating the resulting population to the estimated population for the Structure Plan Area.

(E) Multiplying dwellings by GLA estimates and then a GLA to GBA conversion factor provides an estimate of residential GBA.

Steps A to E are repeated at the Structure Plan Area level. These determine the 2021 estimates for population, dwellings and floorspace.

(F) A 'displacement factor' is applied to the existing dwellings within the 1600-metre radius area and the population within the respective dwelling types. This is to reflect that some of the new dwellings will come from the replacement of existing dwellings. Displacement factors have been applied so that low-density dwellings are more likely to be replaced, with some medium-density housing also being replaced by higher-density housing over time. The number of displaced dwellings differs for each 1600-metre area depending on whether there are currently non-residential sites (e.g. a brownfield site) or commercial zones (e.g. activity centres) that can be developed for housing without the need for existing housing to be replaced.

(G) When the displaced dwellings are excluded, it leaves the remaining dwellings (i.e. existing dwellings that will remain) and the population within them. This is calculated by multiplying the total existing dwellings and population by dwelling type by one minus the displacement factor. This is done for each dwelling type.

(H) The population in the dwellings assumed to be displaced (i.e. not specific of which households are displaced) will be accommodated in future new housing within the 1600-metre area. This population is, therefore, added to the net additional population forecast for the area (step I).

(I) The net population change in the 1600-metre area is calculated as the BIC 2041 forecast minus the 2021 Census population. This additional population needs to be housed in the 1600-metre area, along with the displaced population.

(J) The new dwellings and the population within those new dwellings are calculated for each dwelling type (density and bedroom numbers). This is done by adding the total displaced population calculated at H to the total population change at I and then applying a series of inputs derived from the case studies to convert this total new population to new population and dwellings in each dwelling type. These inputs are described at K to N.

(K) To convert the population in need of additional housing (displaced population + new population) to dwelling estimates, a growth factor to existing medium-density dwellings is applied to calculate the estimated new medium dwellings over the forecast period. The growth factor is based on the growth in medium-density dwellings in relevant case studies.

(L) The relative density split for new dwellings is calculated. With the medium-density growth calculated at L, the remainder of the new growth is channelled into high-density dwellings. It is assumed that the new population will not be accommodated through a net increase in low-density housing (the case studies showed that there was either a constant number of low-density dwellings or a decline). Therefore, the new population will only be accommodated in high- or medium-density dwellings.

(M) To segment the population into dwellings by bedroom number for each density, the case studies were again used to derive the share of dwellings split by bedroom number.

(N) A vacancy factor of 5% is applied to the dwellings required for new dwellings within the 1600m radius area. This is to account for unoccupied stock that is necessary for a functioning residential market. Dwellings, including vacant stock, are carried through the model. Vacant stock is already implicit in the existing stock that is not displaced, so the vacancy factor is only applied to new dwellings.

(O) The 1600-metre area total population and dwellings by density and bedroom number for 2041 is calculated by adding the remaining population/dwellings (G) to the new population/dwellings (J).

Having used the case study analysis to derive population and dwelling estimates by dwelling type at the 1600-metre area, the share of dwellings that will be delivered in the Structure Plan Area as a subset of the 1600-metre area needs to be determined. This is done for each density type (see Table E.1 for the applied shares). This is an iterative process as the calculated population in the Structure Plan Area for 2041 (see step P) needs to match the population projection. The starting point is the proportion, as at the 2021 Census, of each density type in the Structure Plan Area compared to the 1600-metre radius area. As the density types have different household sizes attached to them, even though the dwelling number is fixed, a different density mix will support a different population.

(P) The other check to ensure the validity of this split is the change in the absolute number of dwellings by density in the Structure Plan Area, with reference to the findings of the case studies. For example, the absolute number of low-density dwellings would not be expected to increase dramatically, as new development will be higher density. Equally, the number of low- or medium-density dwellings wouldn't be expected to decline dramatically. This is an iterative process to produce a result that 'makes sense' when the available evidence of how density will shift as the projected scale of new development occurs is considered.

(Q) The total Structure Plan Area dwellings in 2041 (by density and bedrooms) are derived by multiplying the total dwellings for the 1600-metre area (O) by the share by density derived in (P). The bedroom mix is assumed to be consistent for each density type with the 1600-metre numbers derived from the case studies.

(R) The total Structure Plan Area population in 2041 (by density and bedrooms) is calculated by multiplying the number of dwellings, for each dwelling type (P), by the household size for that dwelling type which is derived from the 2021 Census (E)[39]. Note the sum of the population by dwelling type needs to match the projection for the Structure Plan in total (derived from CityPlan (published in SRL BIC)). This acts as an inbuilt check of the other inputs. Note the household sizes applied before adjusting population are the those from step (C).

(S) Total residential floorspace requirements is calculated for the Structure Plan Area by multiplying the estimated number of dwellings by type (Q), by the respective average square metres per dwelling and a GLA to GBA conversion factor (T).

(T) The average square metre per dwelling figure is derived using data from the Urbis Apartment Essentials for Medium and High-density and RP data for Low-density dwellings. The GLA to GBA conversion factor is determined using professional knowledge[40] and is outlined in Table E.5.

TABLE E.1 BURWOOD STRUCTURE PLAN AREA SHARE OF 1600-M RADIUS DWELLINGS

	LOW-DENSITY	MEDIUM-DENSITY	HIGH-DENSITY
	PROPORTION 'WITHIN' STRUCTURE PLAN AREA		
Burwood Structure Plan	21.0%	30.0%	50.0%

Source: ABS; AJM JV

TABLE E.2 BURWOOD 1600-M RADIUS AREA AND STRUCTURE PLAN AREA DISPLACEMENT FACTOR

		LOW-DENSITY	MEDIUM-DENSITY	TOTAL
Geography	**Unit**	**Displaced dwellings 2021-2041**		
Burwood 1600m Radius Area (explicit)	No.	124	53	176
	Proportion of 2021 Dwellings	2.5%	2.2%	28.3%

Note the table refers to displaced dwellings attributable to the displacement factor. The net changes in dwellings will be different as net changes incorporate projected growth in dwellings by 2041. It is assumed no high-density dwellings will be replaced. Source: ABS; AJM JV.

[39] Note distributing the population into a dwelling structure relies on applying household sizes at the dwelling structure level and then adjusting these to align with population projections. The end distribution is not affected whether household sizes are applied to dwellings including vacancy or excluding vacancy since we have applied a uniform vacancy across all dwellings.

[40] AJM JV notes the exact ratio of GLA to GBA differs substantially between buildings. AJM JV has adopted a ratio of 1.66 for low-density dwellings and 1.35 for medium and high-density dwellings.

KEY HOUSING ASSUMPTIONS

As described through the process above, to translate the overall requirements for dwellings into residential floorspace, several assumptions are applied. Key among those are household size (number of people per household for each dwelling type) and internal area (sq.m) assumptions by dwelling structure. Household size estimates are applied for each household structure as shown in Table E.3. In the body of the report, Studio & 1-bedrooms and 3-bedrooms and 4+ bedrooms have been combined in their own categories.

Household size assumptions are based on data from the case studies, sourced from the 2021 Census. These assumptions are applied to both the Structure Plan and the 1600-metre radius in methodology. There are separate assumptions for dwelling density and bedroom numbers as outlined in Table E.4. They are kept constant through the forecast period. Because there will be more dense housing types in future with fewer bedroom numbers and lower household sizes, the shift towards these housing types will drive a downward shift in the overall household size for the Structure Plan Area, as has broadly been witnessed across Australia in recent decades.

TABLE E.3 HOUSEHOLD SIZE ASSUMPTIONS, 2021–2041

	STUDIO	1-BEDROOM	2-BEDROOMS	3-BEDROOMS	4+ BEDROOMS
Low-density	1.0	1.4	2.0	2.7	3.6
Medium-density	1.1	1.2	2.0	2.7	3.2
High-density	1.1	1.4	2.2	2.8	3.2

Source: ABS; AJM JV. Note Household sizes are applied as per Table E.3. However, population is always calibrated to match the census estimate or Structure Plan Area derived from SRL BIC. Therefore, household sizes extrapolated from modelled results will differ to those in Table E.3

Table E.4 outlines the Internal Area Assumptions. There internal area estimates were applied across existing as well as new dwellings.

To estimate the Gross Building Area (GBA), the floorspace numbers provided in the body of the report, escalation factors as outlined in Table E.5 were applied.

Internal areas assumptions represent the estimated internal floorspace of dwellings. This does not include any external areas such as car parks, gardens or backyards. For low and medium-density, estimates from RP Data was used which provides internal areas of households by density. However, as there are very few households in the Structure Plan Area that are studio or one-bedroom from low-density and medium-density, AJM JV has used professional knowledge to input internal areas for these dwelling types.

High-density internal areas have been estimated via reference to the Urbis Apartment Essentials. The Essentials database tracks all off the plan apartment sales (from developments with over 24 units) across Melbourne and other capital cities.

GBA escalation factors are estimated through professional knowledge of the construction sector. For the Monash Structure Plan Area they have been scaled down to factor in the smaller internal areas of student accommodation prevalent in the Structure Plan Area.

TABLE E.4 INTERNAL AREA ASSUMPTIONS (SQ.M), 2021–2041

	STUDIO	1 BEDROOM	2 BEDROOMS	3 BEDROOMS	4+ BEDROOMS
Low-density	50	75	98	134	200
Medium-density	50	75	94	132	190
High-density	42	53	75	125	186

Source: Urbis Apartment Essentials; RP Data

TABLE E.5 CONVERSION OF INTERNAL AREA TO GROSS BUILDING AREA

DENSITY	INTERNAL AREA TO GBA FACTOR
Low-density	1.66
Medium and high-density	1.35

Source: AJM JV

BUILT-FORM AND HOUSING INDICATORS

The candidate case studies were compared to each of the 1600-metre radius area from each SRL station, across 11 built-form / housing indicators (listed in Appendix D) to find the best match. Depending on the SRL 1600-metre radius area, the indicator weightings were adjusted based on professional knowledge, to reflect the specific housing characteristics of each 1600-metre radius area – for example, in the instance of Clayton or Box Hill, the proximity of a hospital was considered more relevant, while in Burwood and Monash, the proximity to a university was more relevant

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Appendix F

Housing for diverse community needs methodology

Social and affordable housing methodology

ELIGIBILITY FOR SOCIAL AND AFFORDABLE HOUSING

In 2018 the Victorian Government amended the *Planning and Environment Act 1987* (the Act) to define affordable housing as:

'housing, including social housing, that is appropriate for the housing needs of any of the following:

(a) Very Low-Income Households

(b) Low-Income Households

(c) Moderate Income Households'

The estimates for affordable housing in the body of the report are in line with those in the Planning and Environment Act.

Households were only included in the social and affordable housing assessment if they met the following criteria:

Social housing:

1. They are currently renting (as of the 2021 Census).
2. They are in rental distress, defined as spending above 30% of their incomes on rent.
3. Their incomes are within the ranges specified in Housing Victoria Social Housing Priority Access Housing Income Limits (provided in Table F.1).

Affordable housing:

1. They are currently renting (as of the 2021 Census).
2. They are in Rental Distress, defined as spending above 30% of their income on rent.
3. Their incomes are within the ranges specified in Governor-In-Council 2021 Order (provided in Table F.2). Governor in Council Order forms part of the definition of affordable housing under the Act. The Order specifies the income ranges for very low, low, and moderate-income households for affordable housing that is not social housing.

Experiencing homelessness:

An estimate of individuals experiencing homelessness is also incorporated into the assessment of the demand for social and affordable housing because it is vital to ensure they have accommodation in such housing as well.

People experiencing homelessness are defined below who are one of the following:

- Persons living in improvised dwellings, tents, or sleeping out
- Persons in supported accommodation for the homeless
- Persons staying temporarily with other households
- Persons living in boarding houses
- Persons in other temporary lodgings.

Table F.1 outlines the affordable housing income ranges while Table F.2 the social housing income limits.

TABLE F.1 GREATER CAPITAL CITY STATISTICAL AREA OF MELBOURNE AFFORDABLE HOUSING INCOME RANGE CLASSIFICATION

HOUSEHOLD TYPES	VERY LOW INCOME RANGE (ANNUAL)	LOW INCOME RANGE (ANNUAL)	MODERATE INCOME RANGE (ANNUAL)
Single adult	Up to $26,200	$26,201 - $41,920	$41,921 - $62,860
Couple, no dependants	Up to $39,290	$39,291 - $62,870	$62,871 - $94,300
Family (with one or two parents) and dependent children	Up to $55,000	$55,001 - $88,020	$88,021 - $132,030

Source: Governor-In-Council-Order-1-July-2021.pdf (planning.vic.gov.au)

TABLE F.2 VICTORIA SOCIAL HOUSING PRIORITY ACCESS HOUSING INCOME LIMITS, GREATER MELBOURNE

HOUSEHOLD TYPE	ANNUAL INCOME LIMIT
Single person	$32,552
Couple, no dependants	$56,264
Family (one or two parents) with one dependent child	$58,292
Each additional dependant	$2028

Source: Housing Victoria

Detailed methodology

AFFORDABLE AND SOCIAL HOUSING

The methodology considers the relationship between household income and rents at the 2021 Census. It does not consider any future change to either household incomes or housing costs. These changes were not considered because for long-term forecasts such as these, the housing market is assumed to remain in equilibrium with the relationship between household income and rents unchanged.

For this analysis, group households were treated as couples with no dependants, and other family as family with dependent children. If the affordable housing income range did not fit within Census income ranges, the range was apportioned using a pro-rata approach.[41]

The methodology for social and affordable housing and homelessness is as follows:

Use 2021 ABS data for the Structure Plan Area to determine households on Very Low, Low and Moderate incomes, as per Figure F.1. ABS data includes all renters in the Structure Plan Area, including both those in rental distress and those *not in* rental distress.

Determine the proportions of households that rent on Very Low, Low and Moderate Incomes for the Structure Plan Area.

Apply the current proportion of households that rent (before looking at income levels) to Structure Plan modelled housing requirements.

Apply proportions from step 2 to the results of step 3.

Determine the proportion of renters who are in rental distress at the 2021 Census.

Apply proportion from step 5 to Structure Plan modelled demand to determine Affordable Housing estimates.

Determine the proportion of those eligible for social housing within Very Low and Low bands using Housing Victoria income brackets, as outlined in Table F.2.

Apply the proportion from step 7 to Affordable Housing estimates to calculate the demand for social housing.

A high-level diagram of the methodology for social and affordable housing is outlined in Figure F.1.

HOMELESSNESS

To estimate the potential homeless population which also needs to be considered for social and affordable housing, the following steps were taken:

1) To estimate the amount of homeless people within the Structure Plan Area, ABS estimates of the homeless population at the SA3 level were used, imputed from the 2021 Census of Population and Housing.

2) Calculate the proportion of individuals experiencing homelessness within the SA3 the Burwood Structure Plan is located in. From the analysis, this

[41] Pro rata apportioning was needed for all income brackets and to determine those eligible for social housing. That is, of lone person households within the very low income bracket, 96% were eligible for social housing.

proportion was 0.6% for the Monash and Boroondara SA3s, which the Burwood Structure Plan is located within.

3) Apply this proportion to the population forecasts for the relevant Structure Plan Area.

4) Depending on their family composition, those experiencing homelessness could be housed individually or together. Estimates of individuals are provided as a conservative (maximum) estimate of the number of dwellings needed to be provided for these people.

5) Note, the estimated homeless population are additional to the total demand for affordable and social housing, as they are not a part of the population forecast

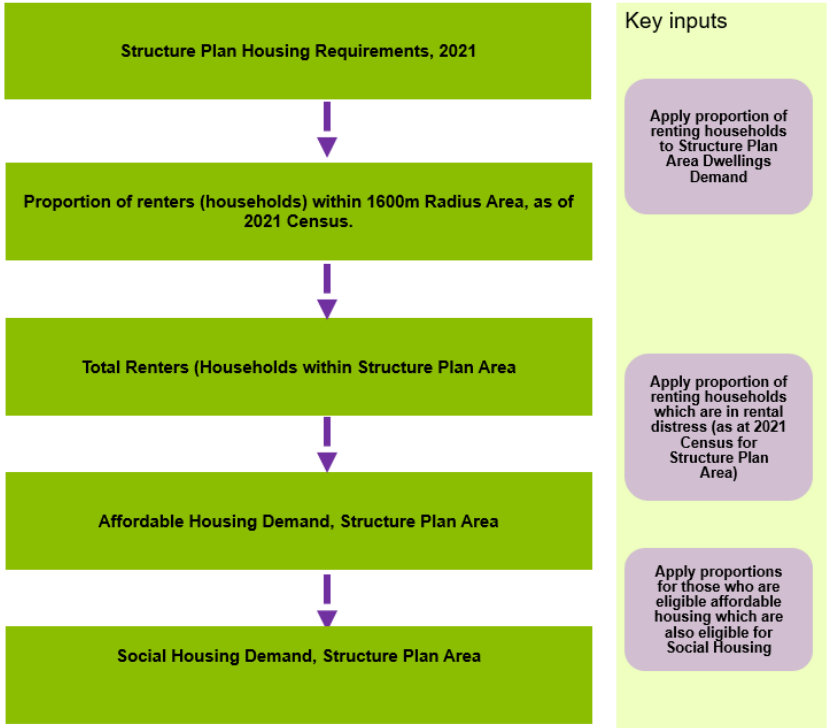

FIGURE F.1 METHODOLOGY FOR DETERMINING SOCIAL AND AFFORDABLE DEMAND

Source: AJM JV

Key worker housing

The method for estimating the future count of key workers in the Structure Plan Area is outlined below.

Note that the share of key workers in different industries and the share of those key workers on very low to moderate incomes and their place of residence was originally considered at the 1600-metre radius area (as opposed to the Structure Plan Area) due to data availability issues at a small area. The proportion of key workers by industry at the 1600-metre radius area was then applied to workers in the Structure Plan Area to calculate estimates for the Structure Plan Area.

The steps involved in estimating the number of key workers is as follows:

1) **Define relevant key worker occupations:** Occupations classified as key worker roles are based on a recent study conducted by the Australian Housing and Urban Research Institute (AHURI). These occupations are defined using defined using ABS four-digit occupation categories. Table F.3 includes a detailed list of eligible occupations.

   Note this compilation encompasses occupations typically associated with high incomes, such as Medical Practitioners. When overlaying income data, those individuals with high incomes will be excluded, while those with lower incomes, such as students, will be retained.

2) **Overlay worker incomes:** Identify key workers with very low, low, and moderate incomes based on the specified ranges outlined in the Victorian Planning and Environment Act 1987.

3) **Consider the key worker's place of residence:** Overlay workers' place of residence by LGA to examine the number of key workers living outside the South East Region.

4) **Estimate the potential number of key workers in the future:** Use the current proportionate share of key workers in each broad industry sector and apply it to job projections for the Structure Plan Area (derived from CityPlan (published in SRL BIC)) to estimate the potential number of key workers in 2041.

TABLE F.3 KEY WORKER OCCUPATIONS BY BROAD INDUSTRY SECTOR

KEY WORKER OCCUPATIONS
Education
Education, Health and Welfare Services Managers, nfd
Child Care Centre Managers
School Principals
Librarians
Education Professionals, nfd
School Teachers, nfd
Early Childhood (Pre-primary School) Teachers
Primary School Teachers
Middle School Teachers (Aus) / Intermediate School Teachers (NZ)
Secondary School Teachers
Special Education Teachers
Tertiary Education Teachers, nfd
University Lecturers and Tutors
Vocational Education Teachers (Aus) / Polytechnic Teachers (NZ)
Miscellaneous Education Professionals, nfd
Private Tutors and Teachers
Teachers of English to Speakers of Other Languages
Education Aides
Library Assistants
Health
Health and Welfare Services Managers
Medical Laboratory Scientists
Health Professionals, nfd
Health Diagnostic and Promotion Professionals, nfd
Medical Imaging Professionals
Optometrists and Orthoptists
Pharmacists
Other Health Diagnostic and Promotion Professionals
Health Therapy Professionals, nfd
Chiropractors and Osteopaths
Complementary Health Therapists
Dental Practitioners
Occupational Therapists
Physiotherapists
Podiatrists
Audiologists and Speech Pathologists \ Therapists
Health (continued)
Medical Practitioners, nfd
General Practitioners and Resident Medical Officers
Anaesthetists
Specialist Physicians
Psychiatrists
Surgeons
Other Medical Practitioners
Midwifery and Nursing Professionals, nfd
Midwives
Nurse Educators and Researchers
Nurse Managers
Registered Nurses
Legal, Social and Welfare Professionals, nfd
Social and Welfare Professionals, nfd
Counsellors
Psychologists
Social Professionals
Social Workers
Welfare, Recreation and Community Arts Workers
Medical Technicians
Community and Personal Service Workers, nfd
Health and Welfare Support Workers, nfd
Ambulance Officers and Paramedics
Dental Hygienists, Technicians and Therapists
Diversional Therapists
Enrolled and Mothercraft Nurses
Indigenous Health Workers
Welfare Support Workers
Carers and Aides, nfd
Child Carers
Personal Carers and Assistants, nfd
Aged and Disabled Carers
Dental Assistants
Nursing Support and Personal Care Workers
Special Care Workers
Other
ICT Professionals, nfd

ICT Network and Support Professionals, nfd
Computer Network Professionals
ICT Support and Test Engineers
Telecommunications Engineering Professionals
ICT and Telecommunications Technicians, nfd
ICT Support Technicians
Science Technicians
Protective Service Workers, nfd
Defence Force Members, Fire Fighters and Police, nfd
Fire and Emergency Workers
Police
Prison and Security Officers, nfd
Prison Officers
Road and Rail Drivers, nfd
Automobile, Bus and Rail Drivers, nfd
Automobile Drivers
Train and Tram Drivers
Delivery Drivers
Truck Drivers
Railway Track Workers
Cleaners and Laundry Workers, nfd
Commercial Cleaners
Domestic Cleaners
Housekeepers
Laundry Workers
Other Cleaners

Source: ABS

Note this is certainly not exhaustive in terms of occupations that could potentially be considered essential to a city's functioning. Other occupations not specifically reflected in the ABS's four-digit occupation categories, such as refuse collectors, also play an important role in city functioning. The implications of the findings could, therefore, extend beyond these specific occupation groups to include other workers.

Student accommodation

The methodology to forecast the demand for student accommodation included:

1) Access student enrolment data for Deakin University from publicly available annual report data. Estimates of student enrolments are provided in Table F.4.

2) Estimate enrolments at the Clayton Campus using historical higher education data from the Department of Education. Distinction is made between local domestic, regional and interstate, and international students due to their differing propensity to require purpose-built student accommodation. Likewise, students commencing studies are more likely to live in student accommodation facilities than those returning beyond their first year.

3) Apply growth rates for the 18-64 years age cohort (for the Structure Plan Area) to forecast enrolments out until 2041.

4) Apply propensities to enrolment data to calculate demand for student accommodation. Propensities refer to the proportion of enrolled students that reside in PBSA while studying. Propensities are sourced from Urbis Student Accommodation Benchmarks, explained in Appendix A. Propensities applied are outlined in Table F.5. In Urbis' modelling, propensities are decreased from 2021-2041 to account for growth in online course offerings and affordability challenges associated with PBSA. Both of these factors will result in less demand for student accommodation and as a result, a slightly lower propensity rate.

5) Estimate the amount of demand likely to be captured in the Structure Plan through looking at the existing supply as a proportion of estimated demand.

Figure F.2 provides a simple overview of the methodology to estimate student accommodation demand.

FIGURE F.2 PBSA DEMAND METHODOLOGY

Source: AJM JV

TABLE F.4 BURWOOD CAMPUS ESTIMATED ENROLMENTS, 2023-41,

	2023	2041
Commencing		
Domestic - Local		
Undergraduate	4353	7232
Postgraduate	476	791
Other	0	0
Domestic - Regional and Interstate		
Undergraduate	484	804
Postgraduate	53	88
Other	0	0
International		
Undergraduate	5414	7732
Postgraduate	712	1212
Other	70	100
Continuing		
Domestic - Local		
Undergraduate	7671	12,743
Postgraduate	551	916
Other	0	0
Domestic - Regional and Interstate		
Undergraduate	852	1416
Postgraduate	61	102
Other	0	0
International		
Undergraduate	2435	3477
Postgraduate	3144	5353
Other	6	9
Total	**26,283**	**41,975**

TABLE F.5 STUDENT ACCOMMODATION PROPENSITIES, 2023-41,

	2023		2041	
	COMMENCING	CONTINUING	COMMENCING	CONTINUING
Local domestic				
Undergraduate	1.5%	0.5%	1.5%	0.5%
Postgraduate	1.0%	0.5%	1.0%	0.5%
Interstate and regional				
Undergraduate	50.0%	25.0%	50.0%	22.5%
Postgraduate	32.5%	17.5%	32.5%	15.0%
International				
Undergraduate	32.5%	10.0%	32.5%	7.5%
Postgraduate	20.0%	7.5%	20.0%	5.0%
Other	30.0%	-	30.0%	-

Source: Urbis Student Accommodation Database

Retirement living

Below is a step-by-step outline of the approach:

1) Use projections for the population over 65 years in the Structure Plan Area.

2) Determine the existing propensity for ILUs and RACs by taking the existing supply and dividing by the over 65 population. The propensity for ILUs is unchanged throughout the forecast period while RACs is decreased to account for the overall decline in over 65's residing in RACs within Australia. When there is no existing supply the propensity to use ILUs or RACs across Greater Melbourne is applied.

3) Apply propensities to the over 65 population within the Structure Plan to determine the total bed demand for ILUs and RACs. Assume propensities stay constant over the forecast period with the growth in the over 65 population driving increased demand.

4) Apply household size estimates for ILUs to determine the demand for ILU units within the Structure Plan Area.

Below are simple diagrams outlining how we calculate the demand for both RAC and ILU's.

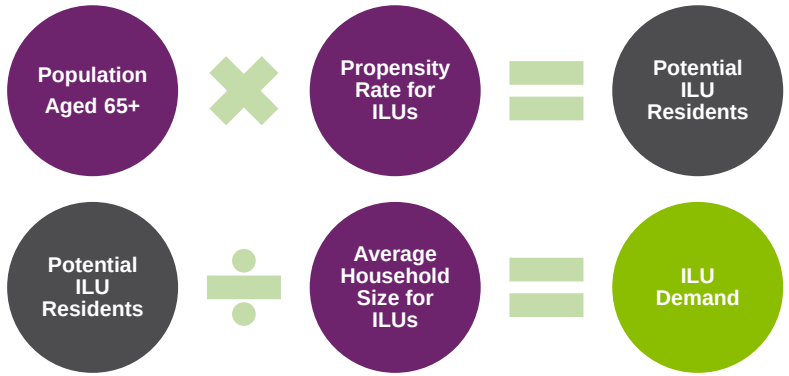

FIGURE F.3 ILU DEMAND METHODOLOGY

Source: AJM JV

FIGURE F.4 RAC DEMAND METHODOLOGY

Source: AJM JV

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Appendix G

Peer review report

Suburban Rail Loop East Precinct Planning Peer Review of Housing Technical Report Burwood Station Precinct

14/02/2025

1.1 Scope of Peer Review

SGS Economics and Planning (SGS), led by Julian Szafraniec, have been engaged by White & Case together with Clayton Utz acting on behalf of the Suburban Rail Loop Authority (SRLA) to provide a peer review of the Burwood Housing Needs Assessment (Technical Report) for the purpose of informing the Structure Plan (SP) and draft planning scheme amendment (PSA) for the Burwood structure plan area (SPA).

SGS was first engaged in relation to this matter in early 2024, and through an iterative approach, has reviewed the housing and economic technical reports for all six SRL East precincts, along with the land use scenario and capacity assessment (LUSCA) report. This peer review report documents SGS' findings as they relate to the Technical Report (dated February 2025).

The peer review advice addresses:

- The appropriateness of the methodology used to translate assumed population projections (developed as part of the Business and Investment Case (BIC)) into various housing needs for the Burwood SPA, specifically for the purposes of informing the SP and draft PSA.
- Understanding if the results of the analysis have then been appropriately presented and suitable precinct recommendations have been developed to inform the SP and draft PSA.

The peer review does not consider:

- Broader macro and regional trends, alternative population growth forecasts for the SRL corridor or station precincts, or the appropriateness of earlier studies, such as the BIC.
- Other technical reports or matters, such as urban design, traffic and community infrastructure.
- The extent to which the recommendations from the Technical Report were ultimately used and implemented in the Burwood SP and draft PSA.

1.2 Summary of peer review

The remainder of this peer review document is structured as follows:

- Section 1.3 provides a summary and peer review of the appropriateness of the method used in the Technical Report for the purposes of informing the SP and draft PSA. This is consistent across all six precinct peer review reports as a consistent method was applied.
- Section 1.4 provides a peer review of the results and recommendations for Burwood SPA specifically.
- Section 1.5 provides final concluding remarks from the peer review of the Technical Report.

1.3 Appropriateness of methodology, assumptions and limitations

The Technical Report is split into four Parts, along with an Executive Summary and a set of Appendices. The same overall structure, and method, for determining housing needs within the SPA has been used consistently across all six SRL East precinct reports. In summary the structure is as follows:

- Executive Summary provides an overview of the analysis and recommendations in the report.
- Introduction (Section 1) details the scope, key definitions, key assumptions, limitations and how the report relates to other technical reports and the SP process.
- Parts A and B provide a summary of key regional and local policy and housing trends.
- Part C contains the core analysis work and details how population projections were translated into various housing needs for the SPA specifically.
- Part D provides results and recommendations specific to the SPA to inform the SP and draft PSA.

The advice contained within this section of the peer review report focuses on the appropriateness of the methodology used (primarily documented in Part C) along with key definitions, assumptions and limitations (largely summarised in Section 1 and the Appendices of the Technical Report). It also provides some high-level commentary related to the appropriateness of the contextual research contained in Parts A and B, while it should be noted these sections do not materially impact the recommendations of the work.

Key inputs and interactions with other background and technical reports

Given the scale of SRL, the evidence base to inform the SP process includes many technical and background reports which investigate specific issues and combine into an overall package.

A key input into the Technical Report is the 1600m catchment precinct population projections which were derived using CityPlan as part of the BIC (August 2021). This is clearly documented in Section 1.6 and in Appendix A of the Technical Report. How they have been used, limitations and uncertainty associated with those inputs are also clearly noted. This includes noting that these projections are strategic and should be considered indicative and that material events (i.e. COVID, 2021 Census) have occurred since their development.

The Technical Report also interacts with other technical reports, including directly inputting to LUSCA (which SGS has separately completed a peer review of) and the SP. The scope and interactions with these other technical reports and the SP has informed the approach taken in the Technical Report. These interactions and broader body of work are clearly documented at Section 1.7 of the Technical Report and have been considered as part of the peer review - rather than considering the Technical Report purely in isolation.

Appropriate specification and application of definitions

For the Technical Report to appropriately inform a SP process, it is critical that any analysis directly relates to the SPA and planning horizon in question. Further, any definitions should be clearly defined and consistently applied to ensure results can be interrogated and correctly used in subsequent work.

These definitional aspects are primarily documented in Section 1 and Appendix A.

- Geography: the Technical Report results and recommendations specifically relate to the whole SPA (summarised in Section 1.8 of the Technical Report). Various inputs consider alternative geographies, including a '1600m catchment' precinct definition, travel zones and Local Government Areas (LGA).

The report is clear on which geography is being used and why. In addition, a large feature of the methodology relates to translating the '1600m catchment' population forecasts from the BIC down to the SPA geography. This draws on small area audit data and other locational assumptions which mean the spatial allocation is more nuanced than a simple 'area' split. Spatial misalignment limitations, common in this type of analysis, are likely to still exist and are also noted in Appendix B.
Overall, I believe the analysis has appropriately considered the land uses differences of various geographies and the final results and recommendations sufficiently reflect the SPA geography, for the purposes of informing a SP process.

In addition, it should be noted the Technical Report includes no sub-precinct results, beyond high-level locational recommendations and opportunities in Section 11. While more spatially detailed analysis could often be contained within a Technical Report such as this, that analysis has been completed in the LUSCA and with input from other technical reports, such as Urban Design. When considered as a package of technical reports which inform the SP process, I believe this is an appropriate approach, but increases the importance of having clear definitions that are consistently applied across all technical reports.

- Time horizon: the Technical Report analysis considers housing needs out to 2041 (20 years from 2021 or 17 years from 2024). I believe this an appropriate planning horizon for SP purposes and is consistent with Planning Practice Note 90: Planning for Housing which identifies a need to plan for "at least a 15-year period".
- Population, housing and floorspace definitions: the Technical report adopts a very broad definition of population, housing and floorspace (see Section 1.5 and Appendix A):
  - 'Population' aligns with standard ABS definitions and includes all 'long-term residents' including those in private and non-private dwellings, such as aged care, hospitals or student dormitories.
  - 'Dwelling' also includes both private and non-private dwelling forms given the definitional and counting challenges associated with non-private dwelling forms (discussed in Appendix A of the Technical Report). This means the dwelling needs and associated floorspace requirements, include both standard private market housing (i.e. detached, townhouse and apartment dwellings) along with other non-private accommodation (i.e. social housing, aged care, student accommodation) - even when the analysis is summarising results by low, medium high density or bedroom numbers.
  - 'Floorspace' in square metres relates to Gross Building Area (GBA) within the Technical Report. This definition includes space for the dwellings plus other internal circulation spaces (i.e. hallways)

  The broad definition of a 'dwelling' used in the report could create some confusion for readers (i.e. they may not understand it captures a bed in a nursing home). However, g*iven housing operates on a continuum, discrete categories can* often overlap and can be difficult to define. The benefit of this approach to how a 'dwelling' is defined, is that the overall dwelling and floorspace requirements in the Technical Report capture the entire population and scale of need within the SPA, with various segmentations by density, type and, diversity all forming a subset of this overall need. For the purpose of informing a SP process, I believe this is appropriate, as it provides the high-level guidance but then leaves more nuanced accommodation matters to still be considered in greater detail through other technical reports (i.e. urban design) and/or at a later stage (post amendment) when individual developments progress and further detailed planning needs to be completed. This broad definition for a dwelling is explained sufficiently, but may still cause confusion if the report is used for other purposes or if the reader is not clear on these complexities around accommodation forms.

  Floorspace definitions are clearly documented in Appendix A and used consistently across all technical reports. It primarily relates to a 'private dwelling' interpretation of requirements and further work would be required to understand how it should be used in various non-private dwelling contexts.

Suitability of background policy and current state analysis

Given the SRL precincts exist within an established urban context, it is critical that there is some analysis of the broader context and current state of the precinct and the housing market. This contextual analysis helps establish the baseline trends and informs the plausibility of assumptions and recommendations.

Part A and B of the Technical Report includes this contextual analysis:

- Part A includes a review of all relevant policy documents and considers a range of macro-trends related to the housing market and the drivers of high-density development. The latter is based solely on Urbis Apartment Essentials data, but the implications drawn, when combined with the broader macro trends analysed in that section provide a clear understanding of the key drivers and implications.
- Part B includes analysis of a range of population and housing trends, including housing costs, affordability and development trends. This draws on a wide range of datasets and, while much of the analysis does not directly relate to the SPA specifically, it provides a valuable understanding of the key trends, issues and opportunities in the precinct and surrounding area.

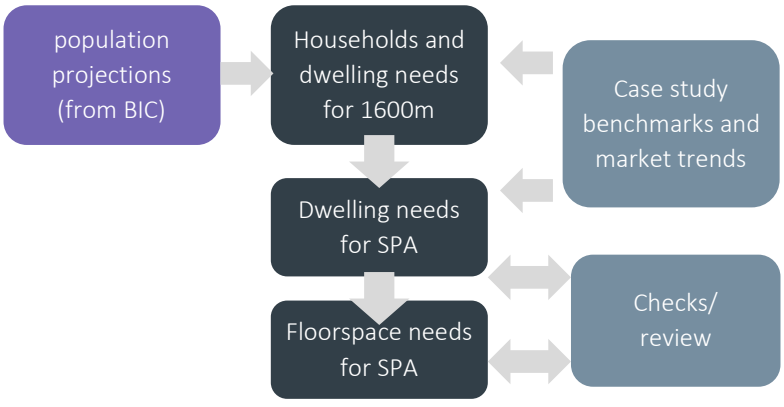
Overall, I believe these sections provide a sufficiently comprehensive summary of the key policy and housing trends that should be considered for a housing needs assessment and SP process as of December 2024. However, I would note that both the current policy and housing market contexts are rapidly evolving in Victoria. Given this, (and subject to the scale of any future (and unknown) changes) there may be a need to review and reconsider the implications from these sections, most likely post Amendment.

Estimating future housing requirements

The core purpose of the Technical Report is to estimate future housing needs in the SPA, to inform the LUSCA technical report and the SP process. The analysis should provide a clear connection between the current and planned population growth of the SPA and the associated housing requirements that should be planned for. To support this, the analysis will need to estimate the broad scale and type of housing that would be required, key locational factors and the ability for the market and current planning controls to deliver the change, or possible interventions/changes that might be implemented as part of the SP process (i.e. rezoning, policy guidance, government investment, etc).

Part C and Appendix E of the Technical Report details the methodology used to estimate housing needs for the SPA. This includes a number of steps required to both estimate housing needs and address various spatial and projections alignment challenges. A simplified version (created by SGS) is presented in Figure 1.

Figure 1: Simplified housing needs method



- Population projections for a 1600m catchment, from the BIC, form the basis of the housing needs analysis for each SRL station precinct. As with any projection, these have a number of limitations which are noted in Appendix B and the original BIC technical reports. In general, compared to previous and existing base forecasts, they reflect a higher (full realisation of SRL project) scenario, which in general is an appropriate scenario type on which to base a SP process. No alternative/ updated population scenarios have been considered in the Technical Report and the appropriateness (or otherwise) of these projections is beyond the scope of this peer review.
- A Case Study based approach is applied to shift household formation and dwelling preference trends and determine the overall housing requirements for the 1600m catchment population. There are a range of suitable ways to complete this type of analysis for a SP process, including this case study based approach. The advantage of this approach is that it will be grounded in 'real-world' examples, but it will also depend on the appropriateness of the case studies selected. Overall, the case study selection approach is robust and comprehensive, considering the same geographic extent (i.e. 1600m catchment) and a wide range of comparator metrics. While not fundamental, no Melbourne comparator locations were considered. This is discussed in Section 7.1.1 of the Technical Report and I do not believe applying different case studies would materially change the results. Overall, no case study is a perfect fit and I believe the case studies selected are appropriate for the SRL precinct and have been appropriately used in this stage of the analysis.

  Given the SRL precinct is a well-established urban location, there will need to be consideration of how new development will be required to displace existing development (i.e. a detached house may be removed to enable a set of townhouses to be built). Estimating this displacement factor is important to determine the 'net' additional housing and can also reflect the rate of change or disruption that a local area might experience. The displacement factor is detailed in Appendix E and Table E.2. It varies by dwelling type and has been based on general housing trends in the precinct. Within the Technical Report, and stage of the analysis, I would consider this displacement factor as indicative only, but still useful and sufficiently accurate. Ideally the displacement rate would consider sub-precinct development planning and capacity, which would further inform the rate of change (i.e. displacement) that is needed in various locations. However, that work is completed in the LUSCA report which is informed by the Technical Report and other technical reports (i.e. Urban Design). While all this analysis could have been included within the Technical Report, given the overall package of technical reports, I believe the approached used is still appropriate for informing the SP process.
- Dwelling needs by type (i.e. low, medium, high) are then allocated to the SPA specifically based on the existing split, with some adjustments based on housing market and policy preferences. This is discussed in Appendix E and Table E.1. In general, this distributes more of the future housing growth into the SPA - than has historically occurred. The shift in dwelling needs, to more dense forms, also contributes to growth being more centrally allocated. Conceptually, this is an appropriate approach which is grounded in existing housing development trends and planning policy. However, adjustments are still somewhat subjective. Where past trends are expected to dramatically shift, this subjective judgement becomes more material. However, without detailed analysis (similar to what has been completed within the SPA) for the areas outside the SPA, it is difficult to avoid this limitation. Ultimately, I believe the approach has sort to address these inherent trade offs as much as possible and the appropriateness of the adjusted spatial allocation proportion should be considered when reviewing the results (see Section 1.4)
- The resulting housing needs for the SPA are then tested against a series of market based questions which are used to both validate the results and inform the Technical Report recommendations around where policy and planning interventions are required. This is an important step that improves the robustness of the final results and recommendations.

- Finally, housing needs by dwelling type and number of bedrooms are translated into **floorspace requirements** in Part D – Section 10 of the Technical Report. This is based on a series of household size and floorspace benchmark assumptions derived from Urbis Apartment Essential and RP Data, which are detailed in Appendix E. Overall, these assumptions are within typical dwelling size ranges and the segmentation approach is appropriate. A further factor is applied to convert the internal dwelling floorspace into a GBA. This varies for low and medium/high density. There is limited data analysis or justification for these factors, however they are within a reasonable and appropriate range.

Housing diversity requirements

It is important that the housing needs assessment identifies the needs of diverse and vulnerable groups to inform the SP process, so that it can ensure they are sufficiently considered and identified.

Within the Technical Report housing diversity is considered as a subset of the total housing need previously estimated. This is considered in Section 9 which assesses future demand for housing tailored to specific community needs including social and affordable, key worker, student, aged care and retirement living.

For each of these community segments, a high-level trend and benchmarking based approach (see Appendix F) has been applied to gain an understanding of the scale of need that should be planned for.

- For social and affordable housing, the analysis has captured people currently experiencing homelessness, those currently in social housing and analysis of housing costs/income to determine households in housing stress and in need of social or affordable housing.
- For key workers a definition of key worker occupations by broad industry has been developed, consideration of incomes and place of residences has been used to determine the number of key workers that should be planned for.
- For student accommodation and aged care various benchmarks have been applied to enrolment and people over 65+ to determine the scale of requirements.

While these approaches are somewhat high level and only provide generalised demand estimates for each segment, I believe they are appropriate for this current stage of SP process. They should inform the scale and general nature of need that should be considered across these diverse community groups and signal what further detailed analysis should be completed at a later stage of implementation - post-amendment. This more detailed analysis might include consultation and further analysis of users/providers and further detail into sites/facilities, appropriate funding and deliver mechanisms.

1.4 Burwood SPA analysis findings and recommendations

The following section considers how the method was applied to Burwood SPA specifically and provides a review of the results and recommendations that have been developed.

Population projections and spatial allocation

The following considers how population growth compares across various geographies using data in Table 8.1 of the Technical Report. As of 2021 the SPA represents 25 per cent of the 1600m catchment dwellings. The applied method results in the SPA capturing 49 per cent of population growth (and a similar share of dwellings), which sees the overall share of population increase to 34 per cent by 2041.

Given the 1600m population projection, this allocation of population (and dwelling) growth in the SPA seems reasonable and broadly inline with the expected policy and market shifts from SRL.

Table 1: Population projection by geography, 2021-41

	Projected Population (no.)		Change (no.)
	2021	2041	2021-2041
Structure Plan Area	5,300	11,100	5,800
SPA as share of 1600m Catchment	25%	34%	49%
1600m Radius Area	21,100	33,000	11,900
South East Region	1,614,900	1,991,900	377,000
Greater Melbourne	4,975,300	7,087,100	2,111,800

Source: Derived from Table 8.1 of the Housing Needs Assessment, AJM, Feb 2025

Population and dwelling by type

The analysis indicates Burwood will need to plan for 11,100 people within the SPA by 2041 and this will require 2,590 net additional dwellings (representing 237,700 square metres of GBA floorspace) to be accommodated within the SPA. The majority of this additional residential floorspace will be high and medium-density dwellings, with a small net reduction of low-density dwellings within the SPA.

The following two tables present some additional statistics that I have prepared based on the results in Table 8.3 of the Technical Report, which assisted my review. Table 2 estimates the resulting household size (i.e. average people per occupied dwelling) by comparing population to dwellings and accounting for 5 per cent vacancy rate. Table 3 then estimates a resulting average dwelling size by comparing the total floorspace to the number of dwellings.

This additional analysis highlights that across Burwood SPA, there is a slight increase in household size for each dwelling type over the planning horizon. This rate of change is within plausible levels, but will still need to be supported through a range of pro-active policy initiatives in the SP and draft PSA. Appropriately, this is also identified directly in Recommendation 5 of Section 11, and would be supported by other recommendations including Recommendation 6 and 7 which encourage adequate supporting infrastructure and amenities and greater diversity of development types.

Table 2: Average household size by dwelling type, 2021-41

	2021	2041	2021-41 change (#)	2021-41 change (%)
Low-density	2.9	3.2	0.4	13%
Medium-density	2.3	2.5	0.2	8%
High-density	2.0	2.2	0.2	9%
Total dwellings	2.6	2.5	-0.1	-5%

Source: Derived from Table 8.3 of the Housing Needs Assessment, AJM, Feb 2025

In addition, Table 3, which I prepared from the data in Table 8.3 of the Technical Report presents the average resulting floorspace size by dwelling type. This shows more modest shifts in the dwelling sizes by dwelling types. The average size of low and higher density dwellings has increased, appropriately reflecting that need to accommodate larger household sizes. Given the shift towards more high-density dwellings, the average of total floorspace compared to total dwellings has decreased.

Table 3: Average floorspace ratios by dwelling type, 2021-41

SQM floorspace per dwelling	2021	2041	2021-41 change (#)	2021-41 change (%)
Low-density	316.9	320.9	4.0	1%
Medium-density	170.4	166.3	-4.2	-2%
High-density	89.0	102.6	13.5	15%
Total dwellings	246.0	161.6	-84.5	-34%

Source: Derived from Table 8.3 of the Housing Needs Assessment, AJM, Feb 2025

Overall, while the dwelling and floorspace requirements for Burwood present just one possible future scenario and do assume a shift in existing market trends, I believe they still present a plausible and appropriate scale and form of housing development to inform the SP and draft PSA process.

Review of recommendations proposed by Technical Report

Section 11 of the Technical report includes 13 Recommendations to inform the development of the SP and draft PSA. These recommendations cover the scale of housing need required, the need to plan for different types of housing (including sizes, forms, social/affordable, key worker, student and aged care) and the importance of providing open space, community facilities and other amenities to support this growth in housing and population. I believe these recommendations are appropriately evidenced via the analysis and cover the range of issues that the SP process should seek to address from a housing needs perspective.

In addition, the recommendations consider the preferred location for housing within the SPA. This includes a focus on higher density in the core, lot consolidation and challenges around the lack of major development sites in the precinct. In general, these locational recommendations are appropriate but will need to be balanced alongside recommendations made in other technical reports as part of the SP process.

1.5 Concluding comments of peer review

Overall, I believe, the final Technical Report's approach, findings and recommendations are an appropriate evidence base to inform the Burwood SP and draft PSA.

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