Greater Geelong C346: Ocean Grove Residential Land Supply and Demand

Expert Evidence Statement

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RESIDENTIAL LAND DEMAND AND SUPPLY

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1. QUALIFICATIONS

1. My name is Paul Shipp and I am a Director of Urban Enterprise Pty Ltd.
2. Urban Enterprise is a firm of urban planners, land economists and tourism planners based in Melbourne. The firm has more than 25 years experience providing consultancy services to all levels of Government and a wide range of private sector organisations in Victoria and in other States of Australia.
3. I am a qualified urban planner with more than 10 years experience and will complete my Master of Commerce in June this year.
4. I have prepared many residential land demand and supply assessments on behalf of Councils and developers, appeared as a Planning Panel Expert Witness in respect of land demand and supply, and have assisted Urban Enterprise Managing Director Matt Ainsaar in the preparation of expert evidence for Planning Panel hearings in respect of land demand and supply on many occasions.
5. My educational qualifications and memberships of professional associations include:
    - Bachelor of Urban Planning and Development, University of Melbourne;
    - Master of Commerce, RMIT University (to be completed in June 2016);
    - Member and Certified Practising Planner (CPP), Planning Institute of Australia;
    - Committee Member, Planning Institute of Australia (Victorian Division);
    - Member, Victorian Planning and Environmental Law Association.

2. ENGAGEMENT

6. I was instructed by Morgan and Griffin in relation to this matter.

7. My instructions were to assess the current supply of and demand for residential land in the Ocean Grove township, and to consider the implications for the Ocean Grove Structure Plan review process.

8. I have reviewed the amendment documentation and other relevant documents and policies, including:

   - The Ocean Grove Structure Plan, City of Greater Geelong, 2007 (the **2007 Structure Plan**);
   - The Ocean Grove Structure Plan, City of Greater Geelong, December 2015 (the **2015 Structure Plan**);
   - G21 Regional Growth Plan (**RGP**), G21 Geelong Region Alliance, April 2013;
   - G21 Regional Growth Plan Implementation Plan, G21 Geelong Region Alliance, December 2013;
   - Residential Land Supply Monitoring Project, G21 Region (Geelong), Spatial Economics, June 2015 (the **G21 Land Supply report**);
   - Greater Geelong Planning Scheme; and
   - Planning Scheme Amendment C346 documentation.

9. I am familiar with the town of Ocean Grove, the City of Greater Geelong, and the other towns and rural areas within.

10. A copy of the relevant information that is required to accord with the Planning Panels Victoria – Expert Evidence Practice Note is attached at Appendix A to this report.

3. The Amendment and Structure Plan

The Amendment

11. Amendment C346 to the Greater Geelong Planning Scheme (**C346**) applies to the town of Ocean Grove, and seeks to implement the findings of the following Council adopted documents into the Greater Geelong Planning Scheme:

    - The 2015 Structure Plan; and
    - The Ocean Grove Town Centre Urban Design Framework (June 2014).

12. C346 proposes to:

    - Amend Clause 21.14 Bellarine Peninsula to include the key strategies of the 2015 Structure Plan and the updated Ocean Grove Structure Plan Map, and the recommendations of the Ocean Grove Town Centre Urban Design Framework Plan (June 2014);
    - Insert a new Schedule 39 to Clause 43.02 Design and Development Overlay to implement key urban design recommendations for the Grubb Road activity centre and restricted retail precinct in the north-east growth area;
    - Insert a new Schedule 40 to Clause 43.02 Design and Development Overlay to implement the key design recommendations of the Ocean Grove Town Centre Urban Design Framework (2014) for the Town Centre;
    - Delete Schedule 16 to Clause 43.02 Design and Development Overlay (Presidents Avenue Ocean Grove);
    - Delete Schedule 27 to Clause 43.02 Design and Development Overlay (Hodgson Street Mixed Use Precinct);
    - Apply Schedule 20 to Clause 43.02 Design and Development Overlay (Industrial 1, 2 and 3 Zones) to the Industrial 3 Zone land within the north-east growth area; and
    - Amend Planning Scheme Maps 81 DDO and 82 DDO.

13. In respect of urban growth and land supply, C346 proposes to update the Ocean Grove Structure Plan map to delete the current long term settlement boundary, and to amend the annotation relating to land west of Grubb Road from “protect long term growth option” to “protect rural landscape setting”.

14. In my opinion, this proposed change to the long term planning strategy for Ocean Grove would be inconsistent with the evidence regarding land demand and supply in the town that I provide later in this evidence statement.

The Structure Plan

15. The 2015 Structure Plan was prepared by Council to provide an update to the 2007 Structure Plan. The 2015 Structure Plan draws on a background report which includes analysis of population growth projections, land supply and demand indicators.

16. A consultation brochure published to inform interested parties of the thrust of the 2015 Structure Plan review (May 2015) included the following commentary relevant to land demand and supply:

- **Growth policy**: "State and local planning policy identify Ocean Grove as having high capacity for growth. The Structure Plan directs this growth to the North-East Growth Area. The decision to grow the town northwards was to protect the fragile coastal environments to the east and west of the town."
- **Population growth**: "The current estimated population of Ocean Grove is 13,581. This is forecast to grow to between 16,800 and 18,300 by 2031. The Structure Plan planned for significantly higher population growth than is actually occurring on the ground. It anticipated a population growth rate of 4.0% and a resulting total population of 21,000 people by 2020. The actual growth rate for the period 2006 - 2011 was 2.21% per annum."
- **Land Supply**: "The Greater Geelong Planning Scheme Clause 11.02-1 Supply of Urban Land directs that sufficient residential land supply should be available to accommodate population growth for a 15 year period. As at 2013, there was a total of 4,377 lots available within the existing settlement boundary."
- **Land demand and adequacy of land supply**: "At a current average annual dwelling approval rate of 151 dwellings, this equates to approximately 28 years land supply in Ocean Grove. The main purpose of the Structure Plan review is to determine if there is sufficient land supply to meet the needs of the growing population. The evidence suggests there is sufficient land. Therefore, there is no need to identify further land beyond the existing settlement boundary."

17. In respect of urban growth, the 2015 Structure Plan concluded that "there is no requirement to release land for urban growth. The north-east growth area will accommodate the majority of the needs of the growing population." (p.8)

18. In terms of nominating a settlement boundary, the 2015 Structure Plan recommends the retention of the existing "settlement boundary 2020", and deleting the "long term boundary beyond 2020".

19. The 2015 Structure Plan notes that the "take up of land and redevelopment will be reviewed every five years and if considered appropriate, a full review of the Structure Plan should be undertaken." (p.5)

20. From the perspective of urban growth, the 2015 Structure Plan is a significant departure from the 2007 Structure Plan, which identified the north-east growth area for short to medium term growth, and identified the need to retain land in the north-west area for long term growth.

21. In the following sections, I provide my opinion on the merits of this approach from a land demand and supply and settlement planning perspective.

4. Policy Context

22. In this section, I provide an overview of the planning policies that are relevant to urban land supply in Ocean Grove, including State, regional and local policies.

STATE PLANNING POLICY CONTEXT

23. The State Planning Policy Framework (**SPPF**) states that planning authorities should "plan to accommodate projected population growth over at least a 15 year period and provide clear direction on locations where growth should occur. Residential land supply will be considered on a municipal basis, rather than a town-by-town basis." (Clause 11.02-1)

24. This is the primary policy direction for local governments when preparing structure plans and other strategic planning to provide sufficient land supply to meet demand. The policy also directs Councils to "monitor development trends and land supply and demand for housing and industry."

25. Although the State Planning Policy Framework requires local councils to plan for at least 15 years supply of land for residential purposes across a municipality, the benchmark is typically applied to individual townships during Structure Plan and similar long term strategic planning processes as a broad measure of the adequacy of land supply at a local level.

26. The G21 Regional Plan Implementation Plan includes commentary on the application of the State requirement for 15 years land supply as follows:

> "Typical municipal benchmarks include 15 years of zoned supply for residential and industrial land before further land rezoning is required. In practice this doesn't reflect some of the complexities identified above or different scales of activity across different towns and municipalities. This trigger is considered appropriate for the majority of centres." (p.83).

27. Due to the variety of residential land supply types and residential property market segments in the Geelong region, it is my view that the City of Greater Geelong is something of a special case for which a simple assessment of land supply at the municipal level is not sufficient. In my opinion, the mix of land uses and residential densities across the municipality (including urban, suburban, inner city, coastal, townships, rural and lifestyle residential land) requires supply levels to be considered for each sub-region and for each designated growth area in the municipality.

28. In my experience, parts of the Bellarine Peninsula generally support demand from quite different markets to urban Geelong. For example, a large supply of affordable greenfield land in Lara will clearly not meet market demand for coastal lifestyle properties on the Bellarine Peninsula. Even within the Bellarine Peninsula I consider there to be a range of market segments active at different price-points. I provide evidence relating to this issue later in my statement.

29. The important differentiation between residential land supply and residential property markets within Greater Geelong is recognised in the G21 Land Supply report, which publishes findings on the adequacy of land supply separately for the two areas. The broader land supply report which relates to the entire G21 Region also reports on the adequacy of supply for separate smaller towns such as Colac and Torquay.

30. The G21 Implementation Plan notes that background work to assess current land supply levels for the City of Greater Geelong shows "data split in two [urban Geelong and the Bellarine Peninsula] to reflect different housing markets, while retaining a sufficiently large area to maximise data quality and comparability and minimise small area data anomalies." (p.78)

31. I provide further analysis of the different property market segments and land supply types later in my evidence.

REGIONAL POLICY CONTEXT

32. The G21 Regional Growth Plan (**RGP**) provides the overarching regional strategy for urban growth in the Geelong region, including the Bellarine Peninsula. The RGP provides strategic support for urban growth on the Bellarine Peninsula to be directed to the designated "District Towns" of Ocean Grove, Drysdale and Leopold.

33. The RGP identifies that a critical driver for managing and sustaining growth in the region is an "adequate land supply in the region across various housing, industry and commercial market segments that provides for choice and affordability and which can respond to increased growth activity." (p.24)

34. The RGP "encourage(s) growth of district towns or centres consistent with existing Structure Plans/Growth Plans", including Ocean Grove.

35. The RGP also identifies "the need to ensure the range of housing options and market segments have sufficient supply to respond to market interest, demand and activity, particularly to the west of Melbourne." (RGP, p.29).

36. The G21 Regional Growth Plan Implementation Plan (2013) includes further commentary on urban growth and land supply relevant to this report. The Implementation Plan includes the regional level action to "Review structure plans in line with Growth Plan including analysis of identified growth area suitability/capacity" and "monitor 15 year land supply and growth activity annually" (p.66).

LOCAL PLANNING POLICY CONTEXT

37. The Greater Geelong Local Planning Policy Framework (**LPPF**) designates the locations for urban growth in the municipality in the Municipal Strategic Statement (Clause 21.04) as Armstrong Creek, Lara West, Leopold, North East Ocean Grove and Jetty Road (Drysdale).

38. Local policy (Clause 21.06 – Settlement) includes the following statements relevant to urban land supply in Ocean Grove:

    - The majority of new housing development in the municipality will continue to be in the form of detached dwellings on conventionally sized blocks;
    - There is a need to maintain competition and diversity in the housing market;
    - Limit urban sprawl by directing urban growth to designated urban growth areas;
    - Improve housing affordability through the maintenance of appropriate urban land supplies, the promotion of competition in the housing market and the development of a diverse range of well-located housing stock.

39. Local policy (Clause 21.14-2) includes the following objectives and strategies relevant to urban growth in Ocean Grove:

- "Facilitate the development of Ocean Grove, Drysdale/Clifton Springs and Leopold as hubs of development and service provision on the Bellarine Peninsula;
- Direct the bulk of residential growth and retail development [on the Bellarine Peninsula] to Ocean Grove, Drysdale/Clifton Springs and Leopold consistent with the relevant Structure Plan maps;
- Direct new greenfield residential development to the designated growth area in the north-east of the township [of Ocean Grove], as shown on the Structure Plan map;
- Encourage a range of accommodation and housing options, including aged care within and adjacent to the [Ocean Grove] town centre and other existing and proposed activity centres; and
- Ensure development [in Ocean Grove] avoids impacts on environmental assets including the Coast, Buckley Park Foreshore Reserve, Goandra Estate, Ocean Grove Nature Reserve, Barwon River/Lake Conneware and the Lake Victoria Wetlands."

40. In my opinion, the RGP and LPPF clearly designate Ocean Grove as a preferred location for urban growth. In order to meet the requirements of the SPPF, it is my view that Council should ensure provision of at least 15 years residential land supply in Ocean Grove, and provide clear direction on locations where growth should occur, both within the existing settlement boundary and protecting future urban growth options.

5. Residential Land Supply

INTRODUCTION

41. In this section I provide details of my assessment of the existing residential land supply in Ocean Grove and the Bellarine Peninsula.

42. The Ocean Grove land supply information in my statement has been compiled by undertaking a critical review of the land supply estimate for Ocean Grove published in the G21 Land Supply Report.

OCEAN GROVE LAND SUPPLY

43. According to the G21 Land Supply Report, there was a supply of 4,052 lots in Ocean Grove as at March 2015. This supply comprised a lot capacity of 3,629 lots in broadhectare estates and 423 individual vacant lots.

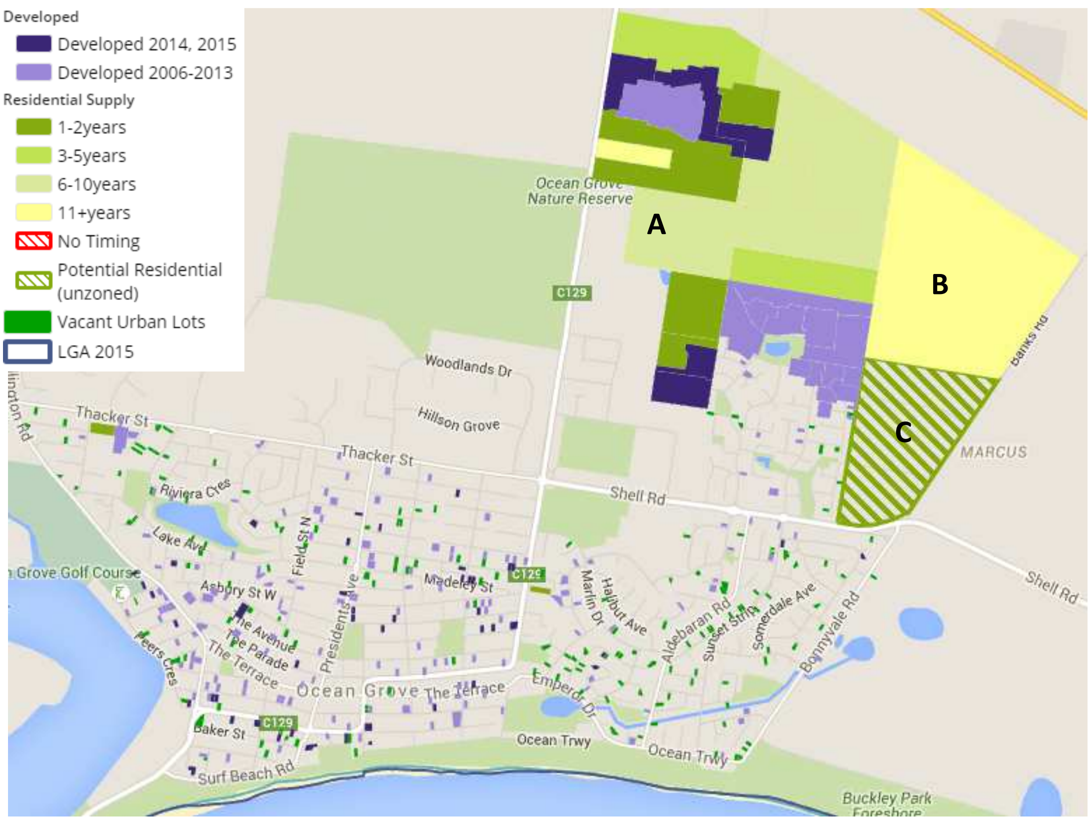
44. The land supply is summarised in Table 1, and the location of all land supply is shown in Figure 1.

TABLE 1 OCEAN GROVE LAND SUPPLY, MARCH 2015

	Broadhectare	Vacant Lots	Total
Ocean Grove Settlement	3629	423	4052

Source: Spatial Economics, June 2015.

FIGURE 1 LAND SUPPLY MAP – OCEAN GROVE



Source: G21 Land Supply Monitor.

45. My review of aerial photography (using Google Maps, 2015) revealed that 26 'vacant' lots on the G21 Land Supply Monitor mapping system are now occupied by a single dwelling. In my view, these lots should now be excluded from the supply assessment to provide the most up to date information available.

46. My review of the remaining broadhectare lot supply in the north east growth area found that the G21 Land Supply report estimate of 3,175 lots remaining is an overestimate due to the following issues.

47. The yield estimate for the 23.76 ha parcel to the east of the Commercial 1 Zone of 300 lots is overestimated due to the approximately 8ha of this land designated for active open space and drainage purposes (shown as "A" in Figure 1). A more accurate lot yield would therefore be approximately 200 lots for this parcel, a reduction of 100 lots from the G21 Land Supply Report estimate.

48. In my opinion, the lot supply calculated in the G21 Land Supply Report should be considered as a theoretical maximum supply. In practice, not all of these lots will necessarily be made available to the market in the short to medium term. It is standard practice to apply a discount to the available land supply to reflect that not all lots will be made available to the market in the planning period, due to lots being held for investment purposes, and the intentions and financial capacity of landowners to subdivide land. A supply discount in the order of 10% to 20% is generally applied - I have applied a discount of 15%.

49. In my opinion, the current lot supply in Ocean Grove is therefore 3,337 lots, as shown in Table 2.

TABLE 2 REVISED OCEAN GROVE LAND SUPPLY

	Broadhectare	Vacant Lots	Total
Spatial Economics Geelong report	3,629	423	4,052
Urban Enterprise Reduction	100	26	126
Revised Supply (all lots)	**3,529**	**397**	**3,926**
Discounted supply (85%)	**3,000**	**337**	**3,337**

Source: Spatial Economics, June 2015 and Urban Enterprise, 2015.

LAND SUPPLY ON THE BELLARINE PENINSULA

50. The G21 Land Supply Report found that the overall zoned supply currently available within the Bellarine Peninsula in 2015 was 10,114 zoned lots for standard residential dwellings. Based on the estimate of demand, this supply was found to equate to 14 years of supply.

51. In my view, not all townships on the Bellarine Peninsula compete with Ocean Grove for market demand due to the different locations, price points and landscape settings. I provide evidence of this differentiation later in my statement.

6. Residential Land Demand

INTRODUCTION

52. In this section I provide details of the potential residential land demand in Ocean Grove and other townships on the Bellarine Peninsula.

53. I have used a range of data sources to provide indictors of demand for residential land in Ocean Grove, competing towns, and the Bellarine Peninsula. These include:

- The G21 Land Supply report;
- Property price trends for houses, units and vacant lots published in A Guide to Property Values, Department of Environment, Land, Water and Planning, 2015;
- Victoria in Future 2015 (official State Government population projections);
- Data on recent lot sales in Ocean Grove provided to me by Morgan and Griffin;
- ABS Census and other ABS data relating to population growth and demographics; and
- Data provided by Barwon Water regarding the number of reticulated water connections.

54. I note that the geographies and boundaries used differ slightly across the data sources as shown in Appendix B.

MEASURES OF HISTORICAL POPULATION AND DWELLING GROWTH

55. Estimated Resident Population (ERP) is the official population measure in Australia, however ERP data is not published for individual townships such as Ocean Grove. Usual Resident Population (URP) provides a guide to the likely population of smaller areas at each Census.

56. The Ocean Grove State Suburb URP was 12,555 residents as at the 2011 Census. The URP increased at an average rate of 2.18% per annum over the period 2006 to 2011.

57. Although there is no official population estimate for individual towns between Census years, Forecast ID projections prepared for Council estimate that the current (2015) population of Ocean Grove is 13,855 persons, which equates to an average increase of 2.46% per annum from the URP in 2011.

58. These historical population estimates show that Ocean Grove has been experiencing significant population growth over the past 10 years in excess of 2% per annum, underpinning substantial demand for new housing in the town.

59. The rate of construction of new dwellings provides a key indicator of historical residential demand and is also typically used to inform projections of likely future dwelling demand in townships.

60. I have reviewed the following sources to provide information on historical dwelling approvals, including:

- The G21 Land Supply Report and the G21 Land Supply Monitor online tool;
- ABS Building Approvals by Statistical Area 2 (SA2);

- Victorian Building Authority (**VBA**) data on building permits.

61. Similarly, Barwon Water connections data shows the number of dwellings that have been newly connected to the reticulated water network.

62. The G21 Land Supply Monitor provides data for 'Developed Residential' for the Ocean Grove settlement. 'Developed residential' is not defined, however the data appears to relate to residential zoned lots which have had a new dwelling constructed (i.e. dwelling approvals).

63. Table 3 shows the 'developed residential' rates for Ocean Grove and the Bellarine Peninsula. Table 3 shows that in Ocean Grove, a significant decrease in approval volumes in 2010/11 and 2011/12 was followed by a strong increase in 2012/13 once new land was released in the North East Ocean Grove Growth Area (once Amendment C60 was gazetted and new greenfield land was developed in this area).

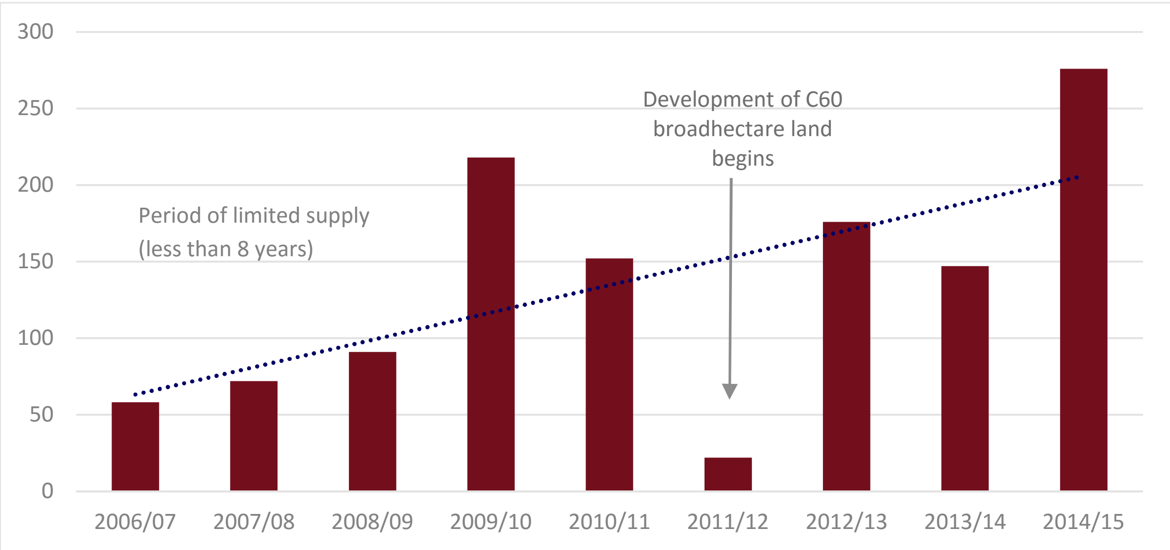
64. I have included a graph showing the number of developed residential lots since 2006/07 in Figure 2, along with an annotation showing the timing of new land release in the North East Growth Area.

TABLE 3 G21 DEVELOPED RESIDENTIAL RATES

Settlement	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	9 year ave p.a.	3 year ave p.a.
Ocean Grove	58	72	91	218	152	22	176	147	276	135	200
Total Bellarine Peninsula	274	298	359	779	732	758	690	676	813	598	726

Source: Spatial Economics 2015, analysed by Urban Enterprise. *includes: Ocean Grove, Barwon Heads, Leopold, Clifton Springs/Drysdale.

FIGURE 2 DWELLING DEVELOPMENT IN OCEAN GROVE, 2006/7 – 2014/15



Source: Spatial Economics, June 2015, annotated by Urban Enterprise.

65. It is my view that for much of the period since 2005, there has been a lack of residential land supply in Ocean Grove relative to demand. This view is based on the following information:

- The Bellarine Peninsula Land Use and Residential Lot Supply Report (City of Greater Geelong, 2005) found that there were 980 lots in Ocean Grove, equating to a supply of 6.85 years (which in turn equates to an annual demand in of 143 lots); and
- Urban Enterprise's assessment of land demand and supply in Ocean Grove in 2009 found that there was a lot supply of 1,012 lots in 2004, 812 lots in 2007 and 514 lots in 2009. At an estimated demand rate of 170 lots per annum, the 2009 supply was only sufficient to accommodate 3 years supply.

66. In my opinion, this data demonstrates that the rate of dwelling approvals was probably constrained by a lack of available greenfield land supply in Ocean Grove in 2006 to 2009, and again in 2011/12.

67. I consider that the best indication of underlying demand for residential lots in Ocean Grove is the rate of dwelling approvals in times of unconstrained supply, namely the period of 2012/13 to 2014/15. The average development rate over this period was 200 dwellings per annum. This rate also reflects the medium term trend line shown in Figure 2, which has increased strongly over the period.

68. The Victorian Building Authority (VBA) provides data on the number of new dwellings for which a building levy has been paid (and therefore the dwellings have been approved for construction). The data for the suburb of Ocean Grove between 2009 and 2014 (calendar years) shows an average number of new dwelling approvals of 242 per annum over the period.

69. Data on new connections to the Barwon Water service (deemed as connected when a subdivision received a Statement of Compliance) is collected for Ocean Grove including Ocean Grove North / Wallington. Annual data for greenfield and infill lot connections 2007 to 2014.

70. In the five year period 2007 to 2012 Ocean Grove (including Ocean Grove North/Wallington) had 596 allotments connected, an average of 119 per annum, followed by an increased average of 191 per annum in the three year period 2012 to 2015, coinciding with the release of new greenfield land in north east Ocean Grove.

71. In my view, the various data sources analysed confirm that the annual rate of dwelling construction has increased in recent years in line with the release of additional land in the north east growth area, and that demand rates were artificially low during times of restricted supply.

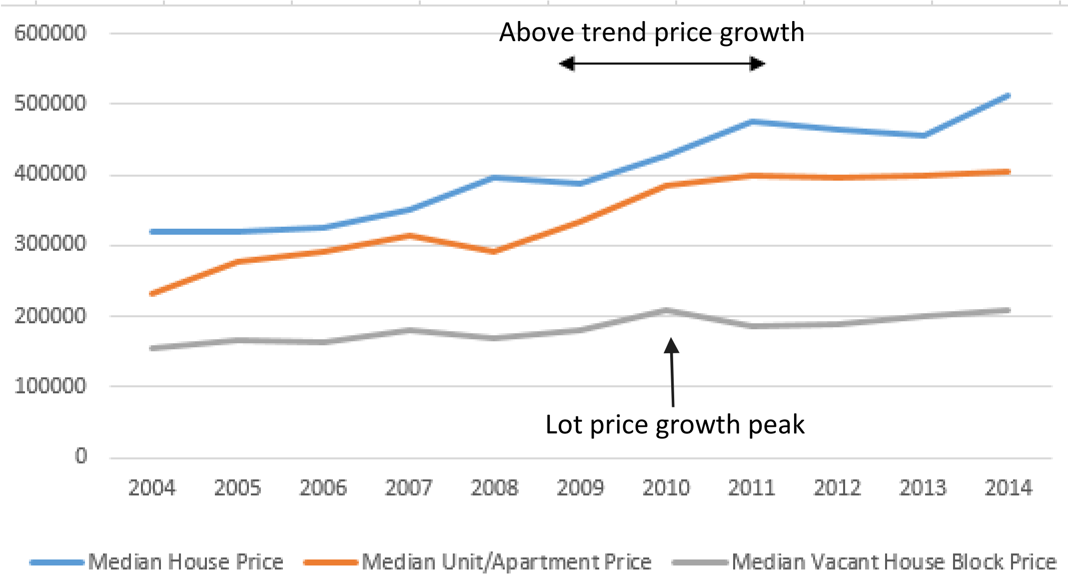
72. I consider that the historical measures of dwelling construction and project population growth combine to indicate an underlying demand rate in the order of 190 to 240 dwellings per annum in Ocean Grove.

PROPERTY VALUES

73. Residential property prices provide an indication of the level of demand for housing in certain areas, and can assist in identifying times at which the relationship between demand and supply may be unbalanced.

74. I have included a graph of median house, unit and vacant lot prices in Ocean Grove over the period 2004 to 2014 in Figure 3, based on data published in the Guide to Property Values 2014 (Department of Environment, Land, Water and Planning). Full data on median property values is included in Appendix C of my evidence.

FIGURE 3 OCEAN GROVE MEDIAN PROPERTY VALUES, 2004 TO 2014



Source: Department of Environment, Land, Water and Planning, A Guide to Property Values, 2014.

75. It is evident that the value of house and unit prices in Ocean Grove have experienced steady growth of over the past 10 years, with an average 4.9%per annum growth in median house prices between 2004 and 2014, and an average growth of 5.7% per annum in median unit/apartment prices over the same period.

76. The median vacant lot price trend provides further evidence of the extent to which a lack of broadhectare land supply was impacting on the market, with a strong increase in the median lot prices in 2009 and 2010, before the median dropped in 2011 with the release of new land supply. Relatively strong price growth is also evident in Figure 3 for houses and units between 2008 and 2011 when lot supply had diminished to very low levels.

77. Vacant lots are now more expensive in Ocean Grove (median of $210,000 in 2014) than the City of Greater Geelong median ($178,000 in 2014), and comparable with growth areas of Melbourne (such as Wyndham City, $220,000 in 2014).

STATE GOVERNMENT POPULATION PROJECTIONS

78. The SPPF requires Councils to have regard to the official State government population projections when planning for urban land supply. The official projections are currently the Victoria in Future 2015 (**VIF15**) projections.

79. VIF15 projects that the Barwon Heads Portarlington Statistical Area (VIFSA shown in Appendix C) will experience population growth of 2.5% per annum from 2016 to 2031. I note that this statistical area includes a small section of the Armstrong Creek Growth Area which will influence the projected growth of the area in the short term.

80. The VIF15 projected growth rate for the overall Bellarine Peninsula is 2.11% per annum, as shown in Table 4.

TABLE 4 VICTORIA IN FUTURE 2015

VIFSA	Population						Dwellings					Ave Dwellings required p.a.	
	2011	2016	2021	2026	2031	Ave growth p.a. 16-31	2011	2016	2021	2026	2031	11 to 31	16-31
Barwon Heads – Portarlington	38,245	42,288	48,082	54,387	61,269	**2.50%**	21,357	23,906	27,100	30,530	34,217	643	687
Leopold – Newcomb	25,192	27,330	29,731	32,022	33,930	1.45%	10,613	11,966	13,094	14,103	14,953	217	199
Total Bellarine	63,437	69,617	77,812	86,409	95,199	2.11%	31,970	35,873	40,195	44,633	49,170	860	887

Source: Victoria in Future 2015. Numbers have been rounded and may not exactly reconcile.

81. The VIF15 projections are based on an expectation for a slight decrease in average household size 2016 to 2031 (2.38 to 2.33) and a slight increase in occupancy rate (74% to 76%).

82. When the projected growth rate for the Barwon Heads Portarlington Statistical Area (2.5% per annum) is applied to the current Ocean Grove population, the total dwelling requirement for Ocean Grove over the next 15 years is 3,466 additional dwellings, an average of 231 dwellings required per annum.

83. In order to account for the impact of a small section of the Armstrong Creek growth area being included in the VIFSA, I have also applied a lower projected rate of 2.25% per annum (which is within the range of recent population growth since 2006). I calculate that this rate of growth would result in a requirement for 204 dwellings per annum in Ocean Grove over the next 15 years.

LOCAL POPULATION PROJECTIONS

84. Many residential land demand studies also consider local population projections, such as those prepared by Forecast ID. There is no requirement under the SPPF, however, for Councils to consider local projections, which in my experience can often significantly under-estimate or over-estimate population growth due to the strong reliance on assumptions made by the authors regarding the location, availability and timing of land supply.

85. In the case of Ocean Grove, the Forecast ID projections are based on the assumption that over the period between 2012 and 2036, an additional 1,900 lots will be developed in greenfield areas (including 135 in Kingston Downs, 161 in Yellow Gums Estate, 809 in the Kingston Estate and 795 in Oakdene Estate).

86. The G21 Land Supply Report identifies a current broadhectare lot supply of 3,629 lots, indicating that the Forecast ID projections assume a low rate of lot construction that will not trigger the need for additional land over the next 20 years.

87. The consumption of 1,900 lots over the period 2012 to 2036 equates to an average of 79 lots created in greenfield estates per annum, however data included in the 2015 Structure Plan notes that broadhectare estates in Ocean Grove have produced an average of 147 new lots per annum over the 3 years since land in the north east growth area was rezoned. I am advised that the Oakdene Estate alone has sold an average of 62 lots per annum since commencement of sales in October 2011.

88. It is therefore my view that the Forecast ID projections significantly underestimates the rate of demand for greenfield lots in Ocean Grove.

89. The resulting projections prepared by Forecast ID estimate that the Ocean Grove population is expected to increase by between 0.88% and 1.21% per annum over the period 2016 to 2036.This rate is significantly lower than both the historical growth rate (in excess of 2% per annum) and the projected growth rates for the Bellarine Peninsula (2.11% per annum) and the Barwon Heads VIFSA (2.5% per annum).

90. This low rate of growth would result in demand for 2,031 new dwellings over the period, equating to demand for 102 dwellings per annum in Ocean Grove.

91. The 2015 Structure Plan “primarily relies on the population forecasts provided by .id the population experts as its basis for population growth.” (p.84). In my opinion, it is evident that the Forecast ID projections relied upon to assess the adequacy of residential land supply in Ocean Grove are significantly under-estimated and would result in a major decrease in the number of dwellings constructed in the town compared with historical activity.

92. In my opinion, the fact that the Forecast ID projections are clearly inconsistent with historical growth rates and do not align with the official State government projections means that they are not a suitable measure of future residential land demand in Ocean Grove.

93. It is also my view that relying solely on the Forecast ID projections for the purposes of assessing the adequacy of land supply for the Ocean Grove Structure Plan is inconsistent with Clause 11.02 of the SPPF.

94. I have therefore not relied upon the Forecast ID projections in making my assessment of future demand, instead relying on what I consider to be more accurate measures of demand, such as dwelling approvals and official projections (VIF15).

95. I note that the consultation brochure for the review of the Ocean Grove Structure Plan relied on an average dwelling approvals rate in Ocean Grove of 151 dwellings per annum. This rate does not appear to be included in the 2015 Structure Plan.

SUMMARY OF DEMAND MEASURES

96. In Table 5 I provide a summary of all demand measures identified. Based on this weight of evidence, it is my view that the most likely average annual dwelling demand rate in Ocean Grove over the next 15 years is between 200 and 230 dwellings per annum.

TABLE 5 OCEAN GROVE DEMAND MEASURES SUMMARY

Source	Geographical Area	Period	Dwellings per annum	Comment
Council Building Approvals, exhibited Structure Plan review material	Not stated	Not stated	151	Supply constraints in recent years have artificially limited demand rates.
G21 'Development' Rate	Ocean Grove Settlement	2012/13 – 14/15 (3 years)	200	Increasing rate of demand, earlier data excluded due to constrained supply periods.
Victorian Building Authority Building Approvals	Ocean Grove Suburb	2009 - 2014	242	Building approvals highest in 2013 (292) & 2014 (265) following increase in broadhectare supply.
Barwon Water	Ocean Grove suburb	2012/13 – 14/15 (3 years)	191	Aligns closely with development rates.
VIF 2015	Ocean Grove settlement	2015 - 2030	204 - 231	Projected growth rate for Barwon Heads Portarlington Statistical Area (2.5%p.a.) and a lower growth rate scenario (2.25%) applied to current Ocean Grove population
Estimated Future Demand Rate	**Ocean Grove Settlement**	**2015 - 2030**	**200 – 230**	**This provides a range between historical and projected demand.**

Source: City of Greater Geelong, Spatial Economics Geelong report, ABS Census. Victoria in Future 2014, Barwon Water, Victorian Building Authority, Urban Enterprise.

7. Adequacy of Land Supply and Strategic Planning Implications

97. Based on my estimate of current land demand and supply, I calculate that there is currently between 15 and 17 years of supply in Ocean Grove. A summary of these calculations is shown in Table 6.

TABLE 6 ADEQUACY OF LAND SUPPLY, OCEAN GROVE

Area	Existing Zoned Supply (lots)	Demand rate per annum	Years Zoned Land Supply
Ocean Grove	3,337	200 - 230	15 - 17

Source: Urban Enterprise.

98. In my experience, the minimum time required to bring currently unzoned greenfield land to the market is at least 3 years, and can be up to 4-5 years.

99. In addition, if a Structure Plan review is required (as is the case of Ocean Grove), this can add significant time to the overall process. The 2015 Structure Plan notes that "the take up of land and redevelopment will be reviewed every five years and if considered appropriate, a full review of the Structure Plan should be undertaken." (p.5). Under these circumstances, I consider that the following timeframes are likely based on my experience:

- Time until supply and demand data is reviewed: 5 years;
- Structure Plan review: 1 year;
- Planning Scheme Amendment Process (including Panel): 2 years;
- Development Plan, DCP and planning permit process: 2 years;
- Design documentation, authority approvals and lot construction: 1 year;
- Title registration and dwelling construction: 1 year.

100. The above process to convert unzoned land into dwellings can take up to 12 years. If action is not taken to identify new unzoned land for future residential growth in Ocean Grove as part of the current Structure Plan review, I estimate that zoned land supply could be as low as 3-4 years by the time that additional dwellings are brought to the market, resulting in a critical shortage similar to the shortage identified in 2007 - 2009 when the 2007 Structure Plan was introduced into the Planning Scheme.

101. The importance of allowing sufficient lead time for the strategic and statutory planning processes is identified by Spatial Economics in the G21 Regional Growth Plan Background Report (p.53) as follows: "Trigger points for the release or rezoning of identified growth areas… will need to provide adequate lead time for planning and rezoning of land to ensure the timely provision of zoned land that is development ready."

THE IMPORTANCE OF COMPETITION

102. In my opinion, a fundamental component of successful residential growth areas is a competitive supply of new developments within a single market. If there is only one active developer or one development site in an area, there is a significant risk that the timing and price of new lot releases will be controlled by a 'monopoly' developer, with the following potential outcomes:

- Slow release of lots to the market at a rate less than the underlying demand rate, thus artificially limiting demand indicators and causing buyers to look elsewhere;
- An accumulation of latent demand for property in the area, resulting in strong competition for new lots once released and therefore strong price growth;
- A greater likelihood that vacant lots will be purchased for investment purposes and not converted to dwellings to meet residential demand.

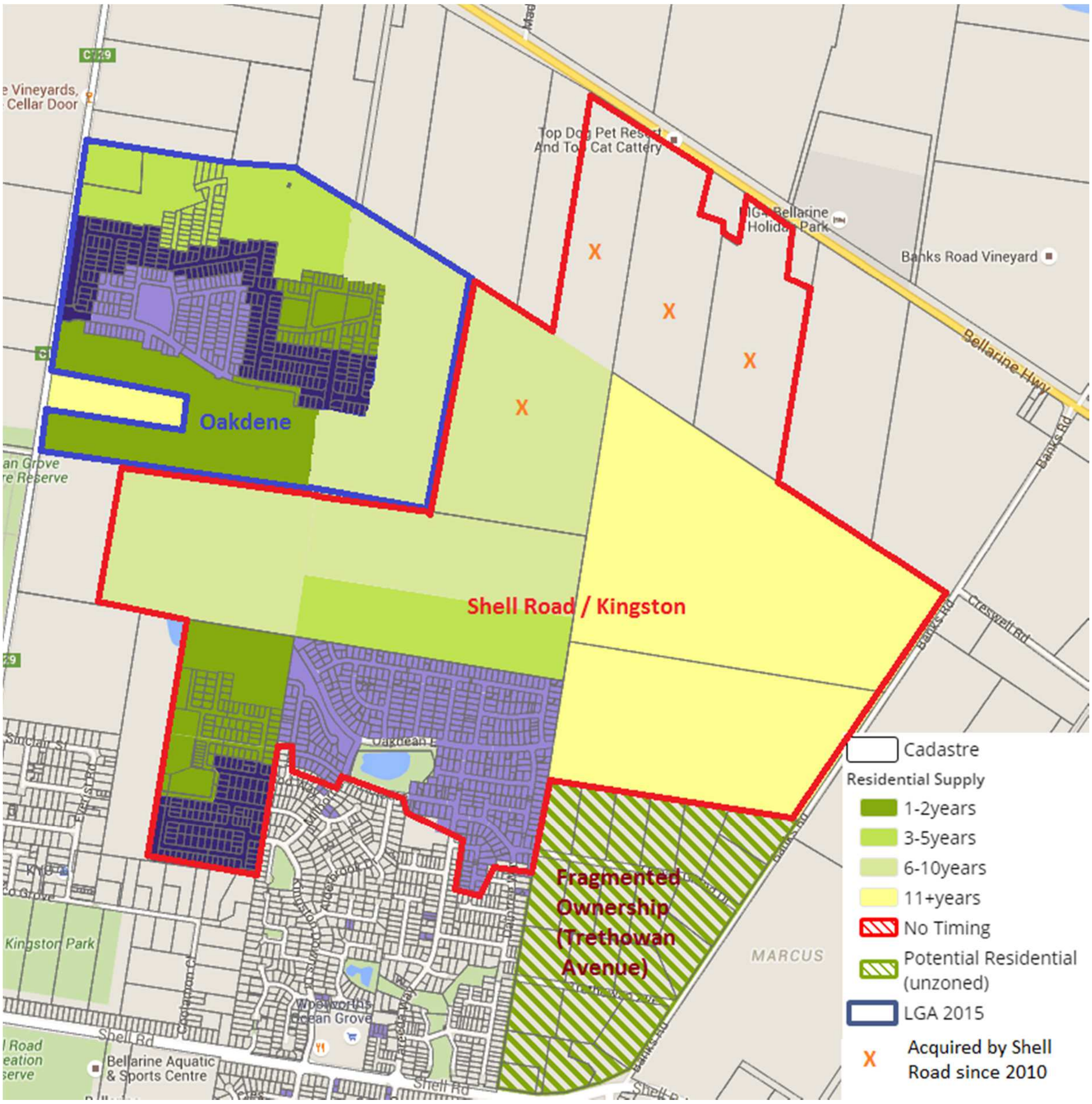
103. The land ownership pattern in the North East Ocean Grove Growth Area – the only growth area in Ocean Grove – is shown in Figure 4. I understand that there are currently only two developers active in the area: Oakdene Estate, and Kingston. Once the Oakdene Estate is complete (which I am advised will occur in approximately six years from now), the Kingston developers will become the only broadhectare developers in Ocean Grove, as I understand was the case in the period 2007 to 2010. Smaller subdivisions will also be possible in the Trethowan Avenue area to the east of the Kingston Estate, however land is far more fragmented in this area and therefore subdivisions are likely to be significantly smaller in yield and slower in release.

104. I am also advised that the majority land owner in the growth area (Shell Road) has acquired 3 properties since 2010 (including one bought from another developer), such that it now owns the vast majority of greenfield land in Ocean Grove, along with two properties immediately adjacent to the growth area to the north.

105. The importance of competition in greenfield residential areas is highlighted by a range of sources, including:

- The Greater Geelong Municipal Strategic Statement: "There is a need to maintain competition and diversity in the housing market." (Clause 21.06-1)
- The G21 Regional Growth Plan, which notes that "A critical driver for managing and sustaining growth in the region is an "adequate land supply in the region across various housing, industry and commercial market segments that provides for choice and affordability and which can respond to increased growth activity"; (p.24)
- The G21 Regional Growth Plan Implementation Plan, which identifies the following (selected) considerations for "determining adequacy of supply and trigger points for new land to be rezoned/developed":
  - "Level of competition which can affect release rates and pricing";
  - "Different housing markets, market behaviour and demand between areas"; and
  - "Lead times for land development." (p.82-83).

FIGURE 4 LAND OWNERSHIP PATTERN NORTH EAST OCEAN GROVE GROWTH AREA



Source: G21 Land Supply Monitor, ownership obtained through title searches and discussions with Morgan and Griffin.

106. I have reviewed the Panel Report for Amendment C312, which considered the St Leonards Structure Plan Review (2015). In evidence, land supply experts highlighted housing choice and affordability benefits of maintaining competition in the market, referring to lot price increases when supply in St Leonards declined. In the Panel report, the Panel:

> "Endorse(d) the Council and expert view that a generous supply of residential land and multiple development fronts can support planning objectives by providing benefits in terms of housing choice and affordability. Rezoning also provides additional certainty for planning and investment in infrastructure by both the public sector and landowners." (p.18).

107. Council also supported rezoning of both proposed growth areas in St Leonards through the Structure Plan process and in submissions to the Panel hearing. The officer's report recommending

that Council commence a Planning Scheme Amendment to implement changes to the St Leonards Structure Plan states that:

> "The release of both areas simultaneously could also create competition in the market place, increasing development rates by capitalising on the marketing of two separate areas. This could have flow on effects to the wider town encouraging businesses to grow or establish within the town centre based on an assurance about the future population of the town.
>
> Releasing two growth areas instead of one would also prevent one developer from controlling the market. This could ultimately increase lot diversity by encouraging developers to provide a slightly different estate and lot type in a more competitive market place." (City of Greater Geelong, Minutes of Ordinary Meeting, 25 February 2014, p.98).

108. In the case of St Leonards, the town is not a designated urban growth area, however it was demonstrated in evidence that there was a steady rate of underlying demand for land in the town and that a lack of new land releases in the town had artificially constrained dwelling growth. By comparison, Ocean Grove *is* identified as one of the key urban growth areas in the City.

109. In my opinion, it is important to ensure that there is an adequate ongoing supply of greenfield land supply in Ocean Grove to ensure development competition, thereby limiting price growth and increasing affordability whilst facilitating diversity of residential land product to cater to different segments of the market.

110. If sufficient land is not provided in Ocean Grove, I expect that the unmet demand for new dwellings in Ocean Grove will be distributed to other towns in the Bellarine Peninsula and Surf Coast Shire, including towns that are not designated urban growth areas. This will create pressure for additional rezoning and settlement boundary changes in these towns, resulting in demand for infrastructure and services being decentralised and occurring in unplanned locations, contrary to the objectives of concentrated development in growth areas such as Ocean Grove where open space, retail, employment and community facilities can be strategically planned and delivered in an efficient and cost-effective manner.

REGIONAL SUPPLY AND COMPARISON WITH OTHER GROWTH AREAS

111. Across the Bellarine Peninsula, the current zoned lot supply is estimated at 10,114 lots in the G21 Land Supply report.

112. The projected demand for lots in the G21 Land Supply report is 682 dwellings per annum (based on Victoria in Future 2014 projections). Recent development activity indicates that a higher dwelling demand across the peninsula is likely, in the order of at least 726 dwellings per annum, being the average of past 3 years housing development activity as published in the G21 land supply online tool.

113. This equates to a current land supply across the Bellarine Peninsula in the order of 14 - 15 years, as shown in Table 7.

114. In my opinion, this shows that further land should be rezoned within the designated growth areas on the Bellarine Peninsula in order to ensure at least 15 years supply is maintained in this region.

TABLE 7 LAND SUPPLY ASSESSMENT, BELLARINE PENINSULA

Area	Existing Zoned Supply (lots)	Demand rate per annum	Years Zoned Land Supply
Bellarine Peninsula	10,114	682 – 726	14 - 15

Source: Urban Enterprise.

115. As mentioned earlier in my evidence, it is my view that the current and future growth areas in the City of Greater Geelong are not interchangeable. In my opinion, each growth area has an important role to play in accommodating demand and maintaining a balanced property market.

116. I have prepared a high level comparison of the services available within these growth areas, and the key demographic indicators as at the 2011 Census. I have included this comparison in Appendix D of my evidence.

117. My analysis covers each designated growth area in Greater Geelong, including Lara, Waurn Ponds (as a proxy for Armstrong Creek), Drysdale and Leopold, along with other nearby towns to Ocean Grove including Torquay, Point Lonsdale, St Leonards and Portarlington.

118. My analysis shows that:

- There are three growth areas of comparable size (population) to Ocean Grove, being Lara, Leopold and Torquay. Of these areas, Ocean Grove offers comparable education, retail and community facilities, and superior active recreation opportunities;
- Torquay is the only comparable growth location in terms of natural amenity, which includes the coast and an ocean beach;
- Ocean Grove's relatively low dwelling occupancy rate of 73% is similar to that of Torquay, indicating the strong holiday home market in these towns. Other growth area towns have significantly higher dwelling occupancy rates of 89% or higher;
- Ocean Grove is considerably different to the other Geelong growth areas of Waurn Ponds (and, by extension, recent development in Armstrong Creek), Lara, Drysdale and Leopold, as demonstrated by the higher house prices, prominence of the holiday home market and coastal amenity within 30 minutes to the Geelong CBD.

119. The strong demand for residential land in Ocean Grove as demonstrated by recent dwelling approvals is, in my opinion, driven by a range of factors including the coastal location (attracting holiday home owners and permanent residents alike), the relative proximity to regional level employment and services in Geelong, and the availability of local education, community, retail and recreation services in Ocean Grove.

120. In my opinion, the relative attractiveness of Ocean Grove to a broad market of permanent residents and holiday home owners is likely to continue, resulting in ongoing strong demand for residential land in the town. Ongoing provision of land supply in Ocean Grove is required to meet the needs of families, couples and holiday home owners looking for a high amenity coastal environment within proximity to services and employment in urban Geelong and with high standards of local services and recreation opportunities.

121. It is my view that the different characteristics of Ocean Grove compared with other designated Greater Geelong growth areas means that land supply is not readily transferrable across the towns and urban areas. Therefore, it is important that an adequate, ongoing supply of urban land is maintained in Ocean Grove.

IMPLICATIONS FOR THE OCEAN GROVE STRUCTURE PLAN

122. In my opinion, the 2007 Structure Plan designation of a "long term boundary beyond 2020" and to "protect [the] long term growth option" west of Grubb Road is consistent with the SPPF policy at Clause 11.02 to "provide clear direction on locations where growth should occur" in Ocean Grove.

123. In the context of strong demand for greenfield residential lots in Ocean Grove, I consider that this designation should be strengthened, as opposed to deleted as proposed, in the 2015 Structure Plan. Given that my estimate is that there is currently between 15 to 17 years supply in Ocean Grove, it is my view that additional land will be required in the short term to ensure an adequate ongoing supply is maintained.

124. If no further land is designated (or at least 'protected') for future growth, or a decision on additional supply is held over to the next Structure Plan review, I consider it likely that there will be a shortage of land.

125. In my view, it is important for the 2015 Structure Plan to clearly identify the next location for strategic urban growth in the town.

8. Conclusions

126. In my opinion, the demand projections used to underpin the 2015 Structure Plan, including the Forecast ID projections and the medium term rate of building approvals in Ocean Grove (151 dwellings per annum) are underestimated.

127. My assessment of land demand and supply in Ocean Grove found that there is currently between 15 and 17 years supply in the town. This indicates that additional greenfield land will be required in the short term to meet the requirements of the SPPF.

128. If action is not taken to identify new unzoned land for future residential growth in Ocean Grove as part of the 2015 Structure Plan, I estimate that zoned land supply could be as low as 3-4 years by the time that additional dwellings are brought to the market. I consider that this would be likely to result in a shortage of land, leading to an absence of competition in the market, strong price growth and slower release of lots to the market.

129. I expect the relative attractiveness of Ocean Grove to a broad market of permanent residents and holiday home owners to continue, resulting in ongoing strong demand for residential land in the town.

130. It is my view that the different characteristics of Ocean Grove compared with other designated Greater Geelong growth areas means that land supply is not readily transferrable across the towns and urban areas. Therefore, it is important that an adequate, ongoing supply of urban land is maintained in Ocean Grove.

131. It is important for the Structure Plan to clearly identify the next location for strategic urban growth in the town given that current demand rates indicate that further zoned land will be required in Ocean Grove in the next 2 to 3 years.

DECLARATION

I have made all the inquiries that I believe are desirable and appropriate and no matters of significance which I regard as relevant have to my knowledge been withheld from the Panel.

Paul A Shipp

Director, Urban Enterprise Pty Ltd. BUPD, MPIA, CPP

APPENDIX A REQUIREMENTS OF PLANNING PANELS VICTORIA – EXPERT EVIDENCE

NAME

Paul Andrew Shipp, Director, Urban Enterprise

ADDRESS

389 St Georges Road, North Fitzroy, Vic 3068

QUALIFICATIONS

- Bachelor of Urban Planning and Development, University of Melbourne.

PROFESSIONAL AFFILIATIONS

- Member, Planning Institute of Australia;
- Certified Practising Planner, Planning Institute of Australia;
- Committee member, Planning Institute of Australia (Victorian Division); and
- Member, Victorian Planning and Environmental Law Association.

EXPERIENCE

I have more than 10 years experience as an urban planner and urban economist and have extensive expertise in the land demand and supply field.

Urban Enterprise has a track record of successfully preparing land demand and supply assessments for Councils and developers.

I have prepared many residential land demand and supply assessments on behalf of Councils and developers, appeared as a Planning Panel Expert Witness in respect of land demand and supply, and have assisted Urban Enterprise Managing Director Matt Ainsaar in the preparation of expert evidence for Planning Panel hearings in respect of land demand and supply on many occasions.

AREAS OF EXPERTISE

My areas of expertise include strategic urban planning, urban economics and development contributions.

EXPERTISE TO PREPARE THIS REPORT

My qualifications in urban planning and the experience I have gained as a practising planner and urban economist over the past 10 years are relevant to this report. I have specific experience in assessing the supply of and demand for land for a variety of land uses, including residential uses, in a variety of locations throughout Victoria.

I have prepared expert evidence in respect of land demand and supply for panel hearings dealing with similar issues in a range of locations in regional Victoria including Drysdale, St Leonards, Warrnambool, Woodend and the Macedon Ranges Rural Living Zones.

I am therefore qualified to prepare this report and expert witness statement.

INSTRUCTIONS

My instructions were to assess the current supply of and demand for residential land in the Ocean Grove township, and to discuss the implications for the Ocean Grove Structure Plan review process.

FACTS, MATTERS AND ASSUMPTIONS RELIED UPON

I have relied on the following for my assessment:

- The Ocean Grove Structure Plan, City of Greater Geelong, 2007 (the **2007 Structure Plan**);
- The Ocean Grove Structure Plan, City of Greater Geelong, December 2015 (the **2015 Structure Plan**);
- G21 Regional Growth Plan, G21 Geelong Region Alliance, April 2013;
- G21 Regional Growth Plan Implementation Plan, G21 Geelong Region Alliance, December 2013;
- Residential Land Supply Monitoring Project, G21 Region (Geelong), Spatial Economics, June 2015 (the **G21 Land Supply report**);
- Greater Geelong Planning Scheme; and
- Planning Scheme Amendment C346 documentation.
- My familiarity with the town and the surrounding area; and
- Relevant experience.

DOCUMENTS TAKEN INTO ACCOUNT

See above.

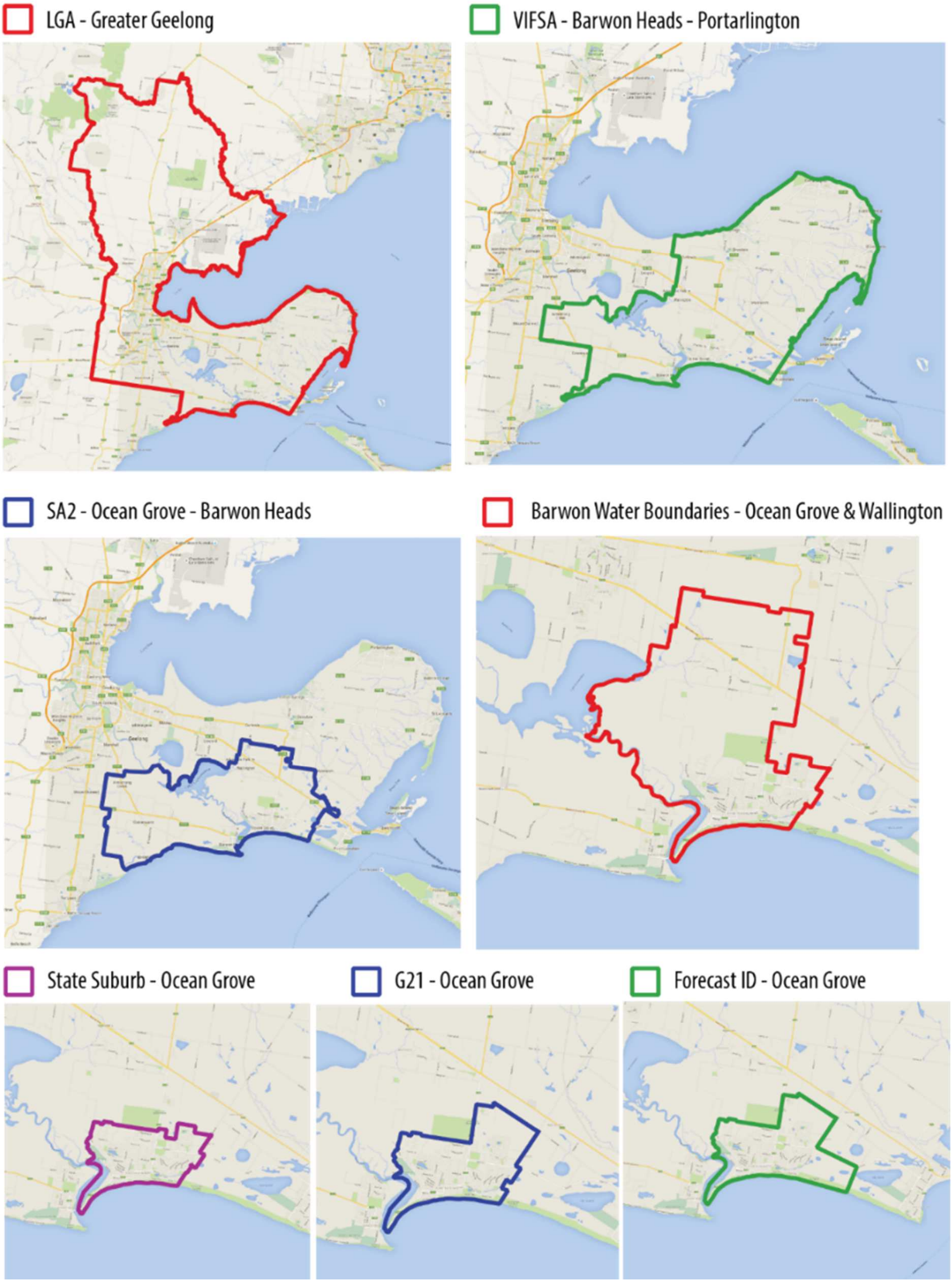
IDENTITY OF PERSONS UNDERTAKING THE WORK

Paul Shipp, Director.

SUMMARY OF OPINIONS

Refer to Section 8: Conclusions.

APPENDIX B DATA GEOGRAPHIES



Source: Urban Enterprise.

APPENDIX C MEDIAN PROPERTY VALUES, OCEAN GROVE AND GREATER GEELONG, 2004 TO 2014

	Ocean Grove			Geelong		
	House Price	Median Unit/ Apartment Price	Median Vacant House Block Price	House Price	Median Unit/ Apartment Price	Median Vacant House Block Price
2004	$319,000	$232,500	$155,000	$242,000	$203,000	$125,000
2005	$320,000	$277,500	$165,000	$250,000	$215,000	$132,000
2006	$324,500	$292,000	$162,500	$261,000	$225,000	$134,000
2007	$350,000	$315,000	$179,500	$275,000	$230,000	$142,000
2008	$395,000	$290,000	$169,500	$285,000	$240,000	$149,000
2009	$387,500	$335,000	$180,000	$303,000	$250,650	$156,000
2010	$428,000	$385,000	$209,000	$345,000	$275,000	$174,000
2011	$475,000	$400,000	**$187,000**	$360,000	$299,000	$182,000
2012	$465,000	$397,500	$190,000	$360,000	$285,000	$180,000
2013	$457,000	$399,000	$200,000	$375,000	$297,950	$180,950
2014	$513,000	$405,000	**$210,000**	$388,000	$300,000	$178,000
Annual Change 13-14	12%	2%	5%	3.5%	0.7%	-1.6%
Annual Change 04-14	**4.9%**	**5.7%**	**3.1%**	**4.8%**	**4.0%**	**3.6%**

Source: Department of Environment, Land, Water & Planning, A Guide to Property Values, 2014.

APPENDIX D GROWTH AREA COMPARISON

	Services				Amenity and Access			Occupancy and median house price		Place of Employment		Age profile	Household structure
Area/ Location	Population (2011)	Schools	Retail	Community	Recreation/ Open Space	Amenity	Distance/ Time to Geelong CBD	% occupied dwellings	Median house price 2014	% - Geelong	% Melb.	Median Age	% of families
Ocean Grove (SSC)	12,555	Pre x 2 Primary x 2 Secondary x 1	Supermarkets x 2 Neighbourhood centres x 2	Community/ Neighbourhood Centre	Football/ cricket oval x 4 Soccer pitch x 2 Aquatic x 1	Coastal + Ocean Beach	24.1km/27 mins	73%	$513,000	44.8%	11.8%	40	43%
Drysdale (SSC)	4,315	Pre x 2 Primary x 1 Primary/ Secondary x 1	Supermarkets x 2 Neighbourhood centres x 1	Community/ Neighbourhood Centre	Football/ cricket oval x 1	Bay/ Hinterland	19.7km/21 mins	89%	$385,000	49.3%	8.9%	45	42%
Lara (SSC)	13,846	Pre x 3 Primary x 4 Secondary x 1	Supermarkets x 1 Neighbourhood centres x 1	Community Centre	Football/ cricket oval x 3	Inland town	16.9km/21 mins	94%	$375,500	66.6%	32.0%	36	51%
Leopold (SSC)	10,111	Pre x 2 Primary x 1	Supermarkets x 3 Neighbourhood centres x 3	Community Centre	Football/ cricket oval x 2	Hinterland	12.1km/15 mins	92%	$366,000	79.9%	8.7%	39	47%
Torquay (Vic.) (SSC)	10,142	Pre x 1 Primary x 2 Secondary x 1	Supermarkets x 2 Neighbourhood centres x 2 (Core retail x 1, Bulky goods x 1)	Community House Maternal/Child Health Centre	Football/ cricket oval x 2	Coastal + Ocean Beach	21.6km/27mins	69%	$580,000	41.0%	15.6%	38	45%
Waurn Ponds (SSC)	3,995	Secondary x 1 University x 1 College x 1	Supermarkets x 3 Neighbourhood centres x 1 (Bulky) Sub-Regional Centre x 1	N/A	Football/ cricket oval x 2 Baseball x 1	Inland, urban	10.6km/17 mins	94%	$470,000	81.4%	10.9%	28	57%
Point Lonsdale	2,466		Supermarkets x 1 Neighbourhood centres x 1	None	Football/ cricket oval x 1	Coastal town	30.6km/31 mins	47%	$710,000	28%	12%	55	23%
St Leonards	2,001	Primary x 1	Supermarkets x 1 Neighbourhood centres x 1	Community Space	Football/ cricket oval x 2	Coastal town	33.2km/33 mins	58%	$355,000	32%	13%	53	25%
Portarlington	3,580	Primary x 1	Supermarkets x 2 Neighbourhood centres x 1	Neighbourhood House	Football/ cricket oval x 2	Coastal town	29.8km/32 mins	42%	$400,000	34%	12%	56	27%

Source: Forecast ID, ABS Census 2011, A Guide to Property Values., Urban Enterprise.