

City of Glen Eira

housing.id

Analysis of housing consumption and opportunities

Updated December 2017

prepared by .id

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1. Introduction

1.1 Objective

The City of Glen Eira is in the process of developing an Activity Centre Strategy and as such require an understanding of the changing demographic and housing patterns within the City. The strategy will provide the strategic framework to implement Council's long term vision regarding the location of new housing across the City. Council wishes to understand how to address community concerns regarding the amount of residential development in the City, while at the same time responding to demand for new residential housing and meeting dwelling targets specified by the Victorian State Government. Using household and dwelling data from the 2016 Census, as well as recent information on building approvals and other data, this report will form the evidence base underpinning the development of the strategy.

To assist in preparing the strategy, Council has commissioned .id (Informed Decisions) to undertake an analysis of housing consumption patterns and opportunities. It also includes an assessment of centres identified by Council as appropriate for intensification and their potential dwelling capacity. The benefits of undertaking this analysis include:

- ▣ meeting critical local needs of changing household types and increase local housing choice for residents
- ▣ addressing affordability by increasing supply
- ▣ sustaining Council's facilities and services base in response to changing age structures and housing consumption patterns
- ▣ protecting valued areas and neighbourhoods from inappropriate development
- ▣ providing an evidence based incorporating data from the 2011 Census
- ▣ providing the appropriate tools and information required to achieve planning outcomes

1.2 Context

In recent years, metropolitan Melbourne has grown at a rapid rate, driven by increased volumes of net overseas migration and a slight increase in the fertility rate. This growth has been particularly rapid on the urban fringe and in parts of the inner

city. The City of Glen Eira has not been immune to these trends but the impacts vary across the City. There is strong demand for housing in Elsternwick, Caulfield and Carnegie, as these suburbs have good proximity and transport links into the CBD, as well as lifestyle opportunities that attract young couples and singles. Other parts of the City, such as Bentleigh and East Bentleigh are popular with young families due to the stock of separate houses on larger blocks.

In early 2017 the Victorian State Government released an update to the Melbourne metropolitan strategy – *Plan Melbourne 2017-2050* – which aims to guide the growth of the Melbourne to 2050. *Plan Melbourne 2017-2050* addressed some of the concerns with the previous metropolitan strategy (*Plan Melbourne*), particularly in relation to the application of the new residential zones. Like most contemporary metropolitan strategies in Australia, the Plan aims to direct more growth into established urban areas in order to reduce urban sprawl and specifies a target of at least 65% of new housing in established areas of Melbourne. Dwelling targets of 110,000 (based on VIF 2016) and 125,000 (aspirational) have been specified for the Inner South East region. The Plan contains nine principles and seven outcomes. Of these – outcome 2 – *Melbourne provides housing choice in locations close to jobs and services* – is most relevant to housing and contains the following directions:

- ▣ Manage the supply of new housing in the right locations to meet population growth and create a sustainable city
- ▣ Deliver more housing closer to jobs and public transport
- ▣ Increase the supply of social and affordable public housing
- ▣ Facilitate decisions-making processes for housing in the right locations
- ▣ Provide greater choice and diversity of housing

The City of Glen Eira's location in the middle ring of south-eastern suburbs means that it is an established part of the urban fabric. Consequently, future development opportunities are dependent on the availability of strategic sites and opportunities for infill. The main constraint on future infill development is the application of the Neighbourhood Residential Zone, which covers almost 80% of residential zones in the City. This zone (along with the General Residential Zone) has particular height and minimum garden area requirements which preclude high density development. At the same time, there are significant development opportunities in many Activity Centres, particularly Carnegie, Caulfield Junction and Bentleigh.

1.3 Approach

This report is presented in three parts. Section 2 presents an analysis of recent and likely future trends in the demand for dwellings in the City of Glen Eira, primarily using 2016 Census data. Section 3 assesses the supply of dwellings from different sources (in-centre, out of centre and forecast.id sites) to identify dwelling opportunities in the City.

Section 2: Understand housing consumption in relation to supply and demand by addressing the following questions:

- ▣ how is the population changing?
- ▣ how is age structure changing?
- ▣ who is leaving and why?
- ▣ who is attracted to the area?
- ▣ how are households changing?
- ▣ how has the dwelling stock changed?
- ▣ who is living in what type of household and dwelling?

Section 3: Quantify residential supply opportunities in the context of where recent development has occurred and where it could occur:

- ▣ in designated Activity Centres/Study Areas
- ▣ infill development outside of Activity Centres/Study Areas
- ▣ on known specific sites – forecast .id sites (yield of ten or more dwellings)

2. Residential demand

2.1 How is the population changing?

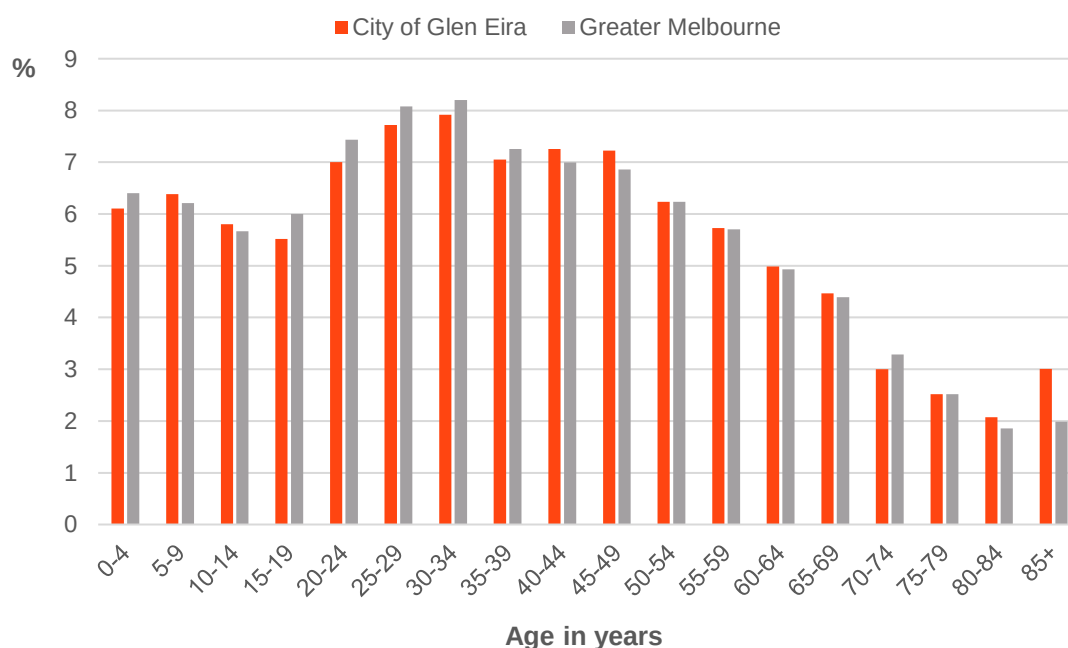
At 30 June 2016, the population of Glen Eira was estimated to be 149,012, representing an average annual growth rate of 1.7% over the previous five years. This is lower than the figure of 2.5% for the Melbourne Greater Capital City Statistical Area (GCCSA) (Greater Melbourne) and 1.6% for the Inner South East region over the same period.

The growth rate of Glen Eira has fluctuated over the last ten years but has been 1.5% or higher since 2011-12. Population growth has been driven by the construction of apartments, especially around train stations and along activity corridors, as well as other infill developments such as dual occupancies.

2.1.1 How has the age structure changed?

In 2016, the age structure of Glen Eira was similar to that of Greater Melbourne (Figure 1). The main difference was the higher proportion of elderly persons in Glen Eira – 7.6% of the population are aged 75 years or over, compared to 6.4% for Greater Melbourne.

Figure 1. Age structure, Glen Eira and Greater Melbourne – 2016

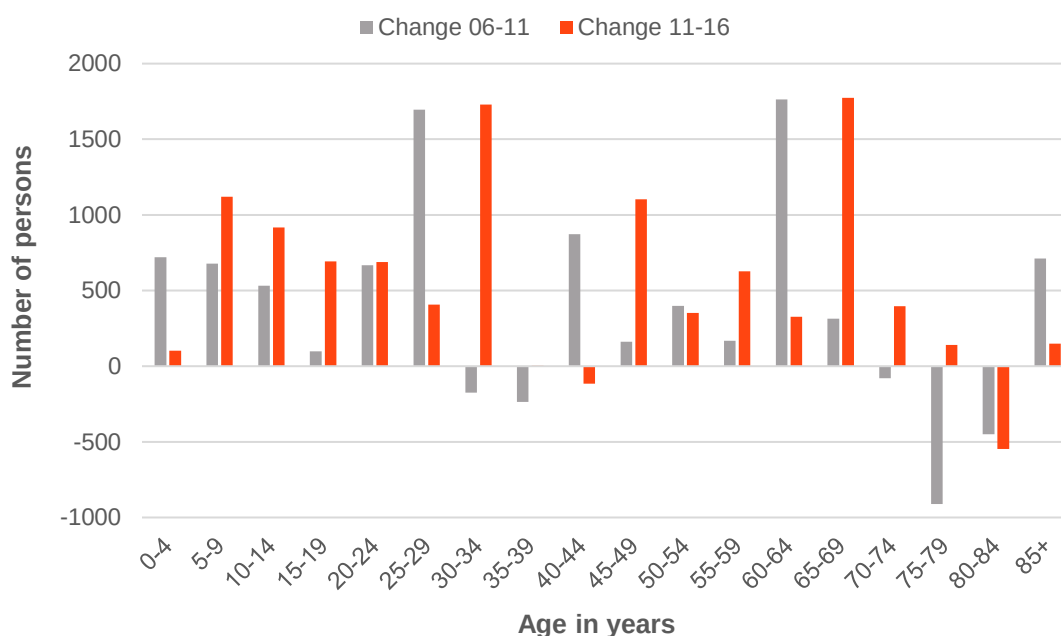


Source: ABS, Census of Population and Housing (2016). Data based on place of usual residence.

Between 2006 and 2011 and again between 2011 and 2016, there were some significant changes to the age structure of Glen Eira (Figure 2). Most cohorts recorded an increase in the number of persons, but there was a large loss of persons aged 75-84 years. The loss of 75-84 year olds was common across Australia as this is one age group where mortality begins to take hold. In addition, it is a smaller cohort overall as these people were born in the late 1930s and early 1940s, when fertility was low due to the Depression and World War 2.

On the other hand, there were large increases in 60-64 year olds between 2006 and 2011 – this age group is the leading edge of the Baby Boomer cohort and they are simply moving through the age spectrum. This cohort continued to age in place in Glen Eira, driving the increase of 65-69 year olds between 2011 and 2016. There were also modest increases in young and school aged children, indicating a movement of families into the area. Again, these families continued to age in place between 2011 and 2016. Also of note is the large increase in 25-29 year olds between 2006 and 2011, a key household forming cohort. This may be driven by the residential development along the train line and closer to the city, this age group being attracted to well located rental accommodation.

Figure 2. Change in age structure, Glen Eira – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016). Data based on place of usual residence.

Overall, these changes in the age structure indicate that, despite modest growth rates, there is significant churn in the population of Glen Eira. This is characteristic of

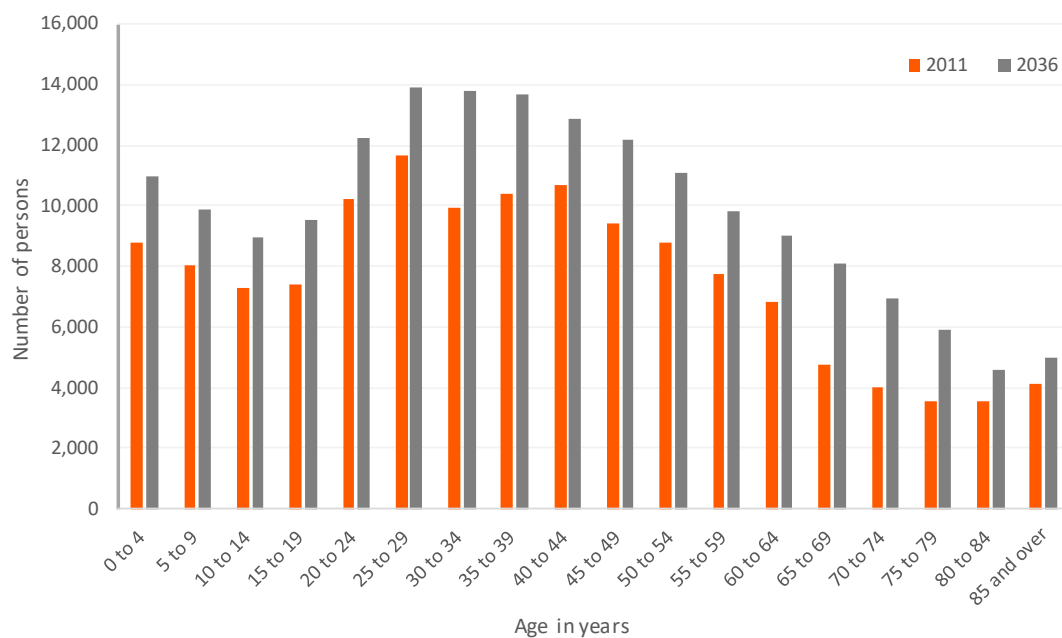
established suburban areas that have developed over many decades but it also reflects its location within the Greater Melbourne metropolitan area. Suburb life cycles can be at different stages across the City and therefore respond to different housing and demographic drivers. In other words, while some parts of Glen Eira are ageing and are ripe for suburban regeneration, other parts have undergone, or are undergoing a process of gentrification based on their relative proximity to the CBD. Because housing needs change depending on age, it creates challenges for service provision and policy formulation, but also highlights the importance of fine grained spatial analysis to determine the different population drivers across the City of Glen Eira.

2.1.2 How will the age structure change in the future?

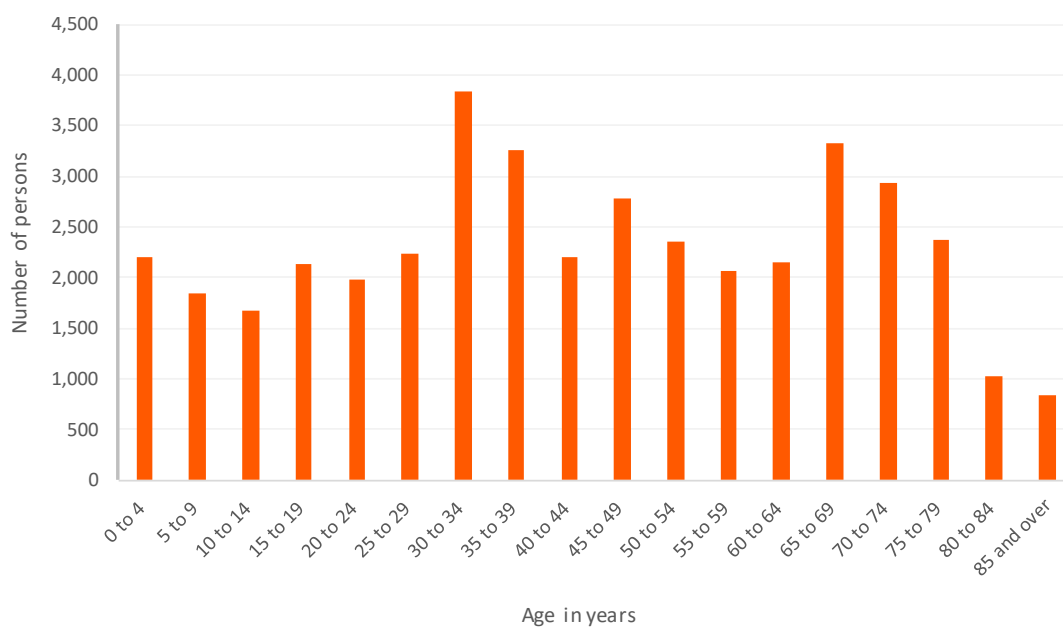
An examination of future changes in the age structure is important for service planning, as many are age dependent eg schools, aged care. In 2015, .id updated population forecasts for Glen Eira, taking into account the results of the 2011 Census and more recent demographic trends. These forecasts indicate modest growth for Glen Eira over the period 2011-2036, with the population increasing from 137,200 to 178,380. This translates to an annual average growth rate of 1.1%, or about 41,190 persons over the twenty-five years. Growth rates are forecast to be relatively consistent over this time, with most growth occurring in the period 2011-2026..

Figure 3 shows the forecast age structure of Glen Eira at 2011 and 2036. Growth is assumed to occur in all age cohorts, with a slightly higher rate of growth for retirees/elderly persons, particularly those aged 65-79 years. These are likely to be people ageing in place. Above average growth is also forecast for 30-39 year olds, many of whom are likely to be family forming households.

This is more apparent in Figure 4, which shows the forecast change in age structure. Persons aged 30-34 years are forecast to record the highest amount of growth, these likely to be younger people seeking housing opportunities with good access to the CBD. High density apartments typically cater for smaller households, many being attractive to renting households. According to the 2011 Census, just under half of medium and high density dwellings are rented, compared to just 16% of separate houses in the City of Glen Eira.

Figure 3. Forecast age structure, Glen Eira – 2011-2036

Source: .id (2015)

Figure 4. Forecast change in age structure, Glen Eira – 2011-2036

Source: .id (2015)

2.1.3 Who is leaving and who is arriving?

Of all the components of population change, migration to Australia and between areas is the most volatile, as it varies considerably over time and space. An examination of migration patterns is critical to understanding how populations grow and change. Characteristics of migration in Australian cities include:

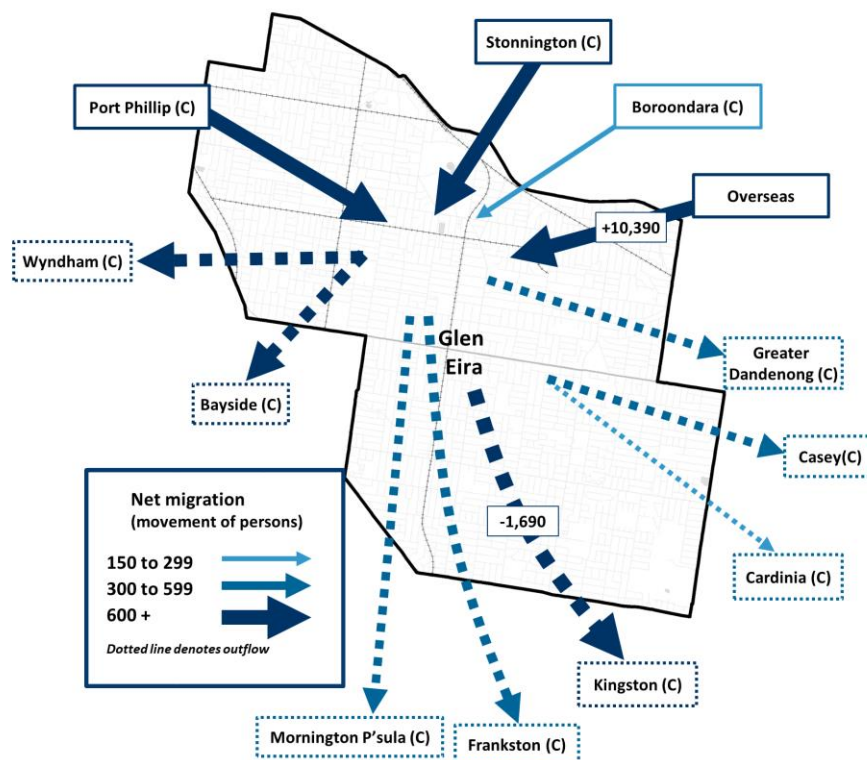
- A high proportion of local moves, ie within the same suburb or municipality;
- The dominance of outward moves in a sectoral direction ie from inner south to outer south; and
- Strong links between life cycle events and age. Young adults ie 18-34 year olds, are the most mobile age group. Thereafter migration tends to decline with age, although there is a slight increase in the oldest age groups which is probably related to health issues.

Figure 5 shows the major migration flows to and from the City of Glen Eira between 2011 and 2016, and there is evidence of these characteristics.

Sectoral outward movement ie from inner south to outer south, is evident from the net outflow to Kingston, Casey and Frankston. There was also substantial movement between neighbouring councils, for example, the strongest net inflows were from Stonnington and Port Phillip. Most of these will be local moves that happen to involve an LGA boundary. Local moves predominate because people tend to move to areas with which they have some familiarity, and it also enables people to retain ties with their local community, and this can be important for families with children attending local schools.

Figure 5. Major net migration flows, Glen Eira – 2011-2016

Migration moves, City of Glen Eira, 2011-2016

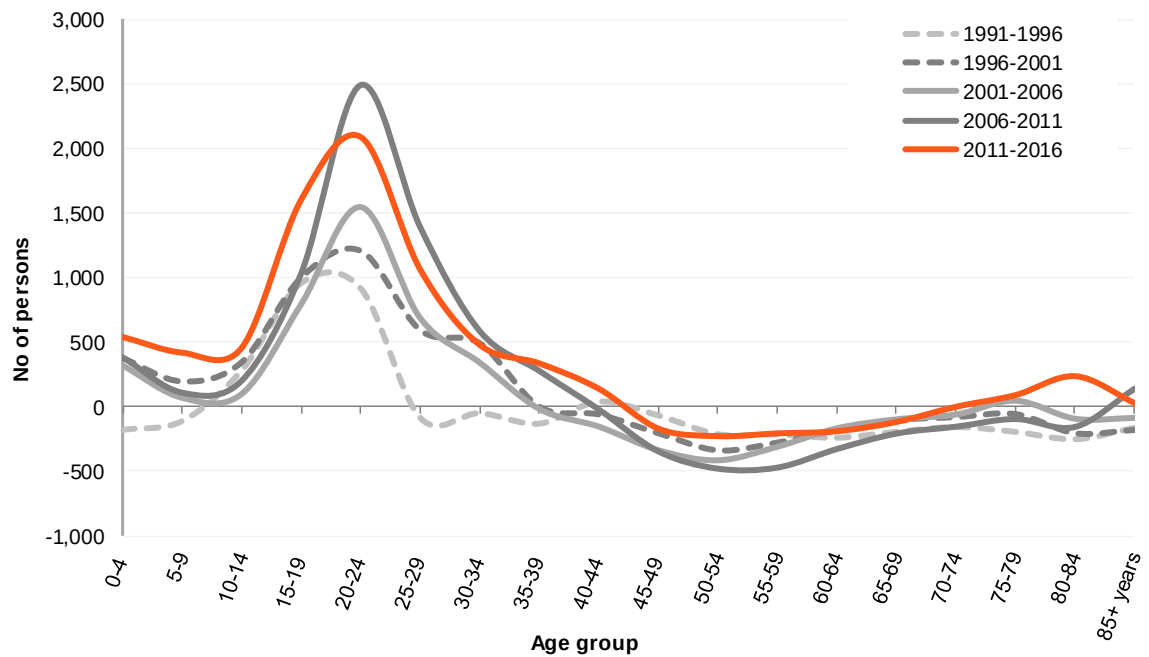


Source: ABS

Source: ABS, Census of Population and Housing (2016)

The strong links between life cycle events and age are reflected in Figure 6, which shows age specific migration patterns in Glen Eira over the period 1991-1996 to 2011-2016. Historically, Glen Eira has gained young adults, typically seeking housing that is close to employment, education and lifestyle opportunities. This pattern has remained relatively stable since the early 1990s. In more recent years, there has been some evidence of suburban regeneration, with the loss of older households being offset by gains in younger families.

Figure 6. Age specific net migration (implied), City of Glen Eira – 1991-1996 - 2011-2016



Source: ABS, Census of Population and Housing (1996, 2001, 2006, 2011 and 2016)

2.2 How are households changing?

The most prevalent household types in Australian cities are typically families – couples with children and single parent households. However, social and demographic changes have combined to change the household mix. These include ageing of the population, family breakdown and fewer children per family. In many areas, family households are declining in number, while smaller households (couples without children and lone person households) are increasing. From a housing perspective, the result is lower average household size ie fewer people per dwelling. It is important to recognise that declining household size tends to increase the demand for dwellings, even if the population is stable or slowly declining.

Until 2006, the result of these trends was declining average household size, however the results of the 2011 Census revealed that at the national level this decline had slowed and in many areas average household size increased slightly. This was certainly the case in the City of Glen Eira where the average household size increased to 2.49 in 2016 from 2.47 in 2011 and 2.40 in 2006.

2.2.1 Households and suburban lifecycles

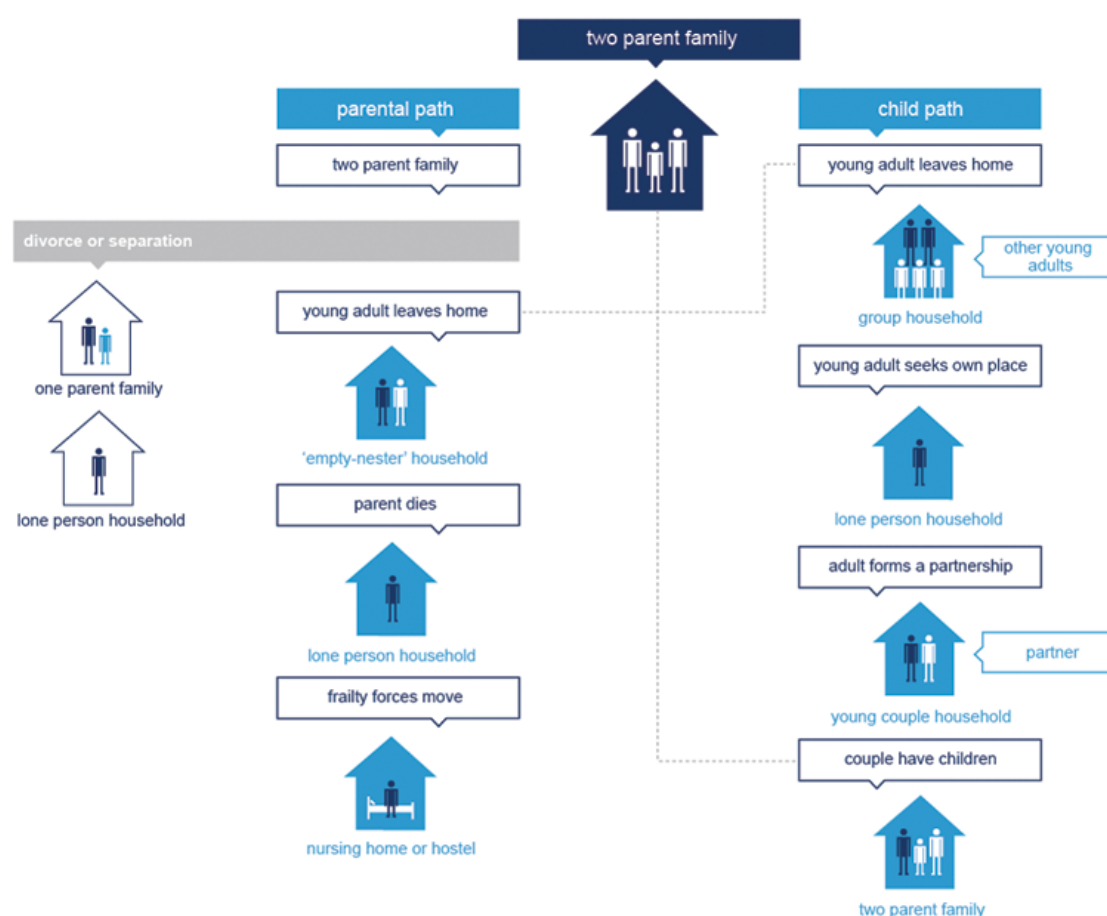
Urban areas are constantly evolving primarily due to changing household needs and preferences reflecting population and age structure changes. Figure 7 provides a framework for traditional household pathways and identifies points at which needs may change.

Starting as a child in a family household, a person may move into a group or lone person household as a young adult, and then often becomes part of a couple relationship. The adult years may feature movement between family, single parent and lone person household needs. Child rearing is followed by an ‘empty-nester’ period (older couples without children) and ultimately becomes an elderly lone person, as partners die or separate.

There is an increasing tendency for people around Australia to live alone or as a couple without children. This is the result of a combination of factors, such as an ageing population, resulting in growth of empty nester and elderly lone person households, as well as the emergence of smaller households resulting from divorce and partner separations.

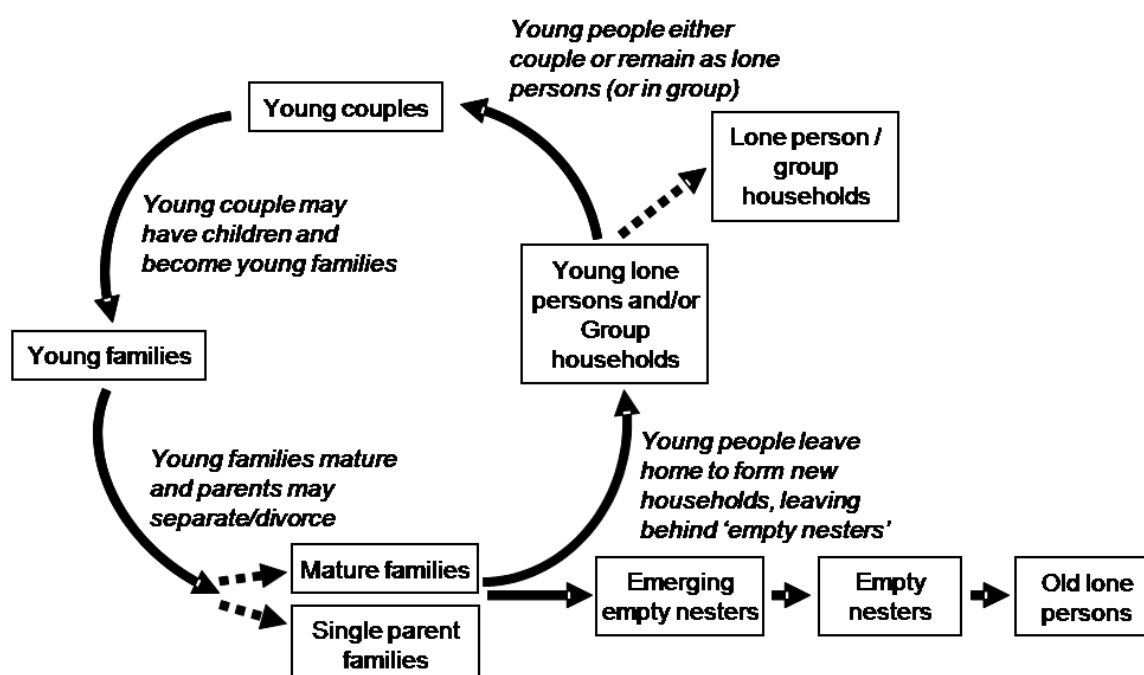
Larger households remain predominant (partly because current housing stock was built to suit larger households). They are continuing to increase and are generally couples with young children. However, while larger households are both dominant and forecast to remain so, the City of Glen Eira, has an increasingly diverse dwelling stock that caters well to other groups, and the ways these patterns vary affect different areas significantly. All other things being equal, smaller households have less income and require less space than larger households. They therefore need more affordable housing, which can be smaller than the traditional three or four bedroom dwelling and yet still cater well for their needs.

Figure 7. Traditional household pathway – a framework



The suburban lifecycle framework (Figure 8) provides an illustration of how suburbs may change over time. Glen Eira is an interesting municipality to analyse with reference to the suburban lifecycle framework as its development has spanned several decades, hence encompassing a wide range of household types which are regenerating at different times. In many parts of the City, especially in the north and east, housing is being “freed up” for younger households as elderly people either pass away or move into nursing homes.

Figure 8. The suburban lifecycle – a framework

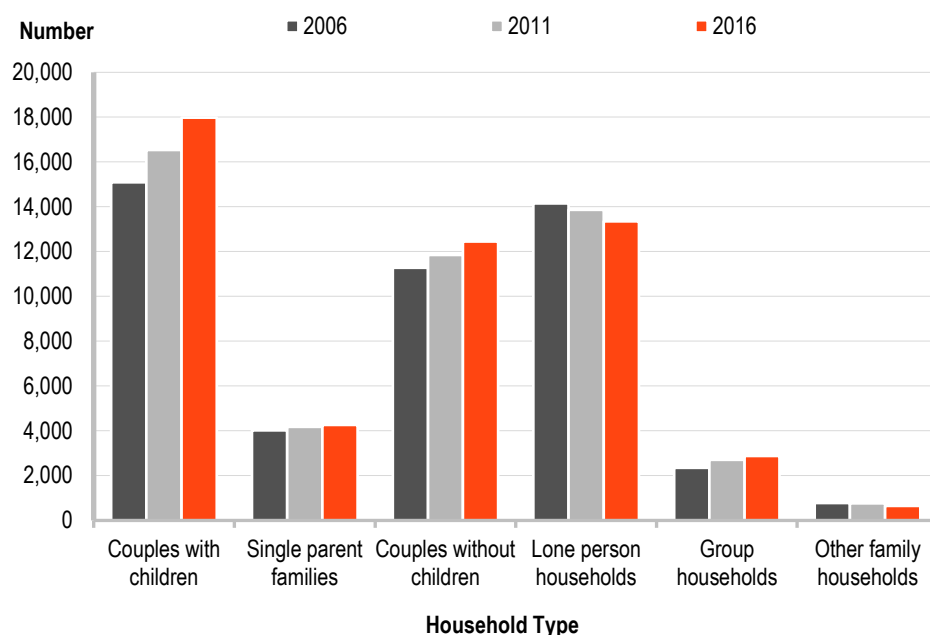


2.2.2 Current households

The 2016 ABS Census identified that the dominant household type in Glen Eira is couples with children, totalling 17,979 households and comprising about one-third of the total (Figures 9 and 10). The number of couples with children households increased by 19.2% (over 2,800 households) between 2006 and 2016, and the proportion increased from 31.7% to 34.9%. This was the most significant change to the household mix over this ten year period.

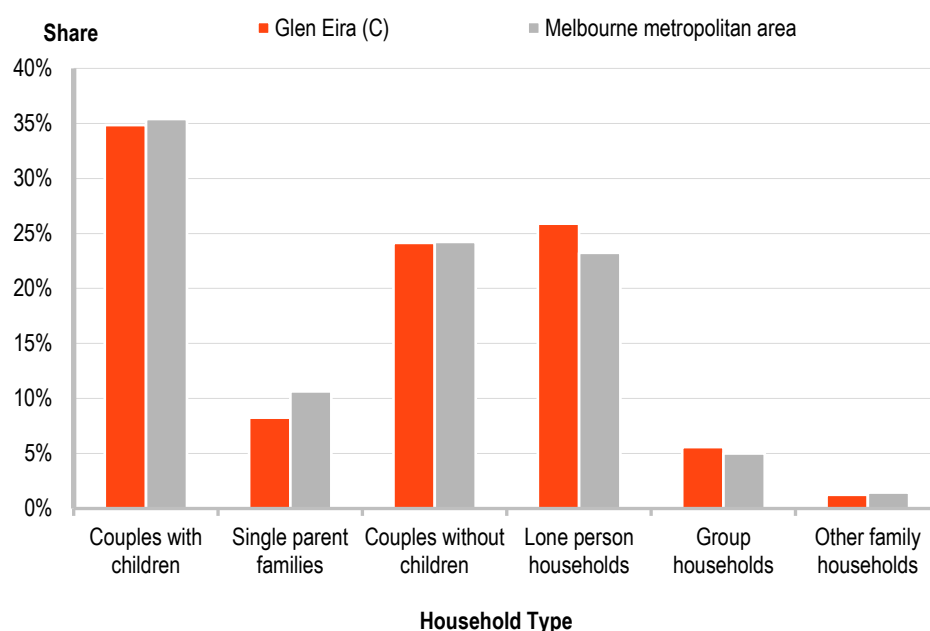
Lone person households were the next most common, comprising around 26% of all households. However, their numbers have been in decline since 2006 – overall the decline was around 6%. In 2006 the number of lone person households and couples with children were similar, but the increase in the latter since that time is part of the reason why the average household size has increased.

Appendix 6.1 has a detailed breakdown of the changes in household and dwelling types between 2006 and 2016.

Figure 9. Household types, Glen Eira – 2006-2016

Source: ABS, Census of Population and Housing (2016)

There are distinct differences between the household type mix in Glen Eira compared with the Melbourne metropolitan area (Figure 10), possibly because the municipality encompasses a range of housing styles and eras. The Melbourne metropolitan area had a greater proportion of family households (couples with children and single parent families), and a slightly higher proportion of couples without children. However, despite the small decline in lone person households in Glen Eira, the proportion of these households was still much higher than the Melbourne metropolitan area (25.9% in Glen Eira and 23.2% in Melbourne metropolitan area).

Figure 10. Share of household types, Glen Eira and Melbourne – 2016

Source: ABS, Census of Population and Housing (2006 and 2016)

2.2.3 Emerging households

Emerging households are those that are increasing in number. They provide some insights into the types of community services that may be needed in future. Service providers, policy makers and the housing industry understand the different housing consumption patterns and servicing needs of ‘young’ and ‘old’ lone person households; similarly, couples with young children households are likely to have quite different needs to older couples without children (“empty nesters”). Analysis is presented for key emerging households using the following groupings:

Children status	Young households	Middle-aged or maturing households	Older households
No children at home	Adults aged 15-44	Adults aged 45-64	Adults aged 65 and over
Children at home	Only children under 15	Children of mixed ages	Only children over 15

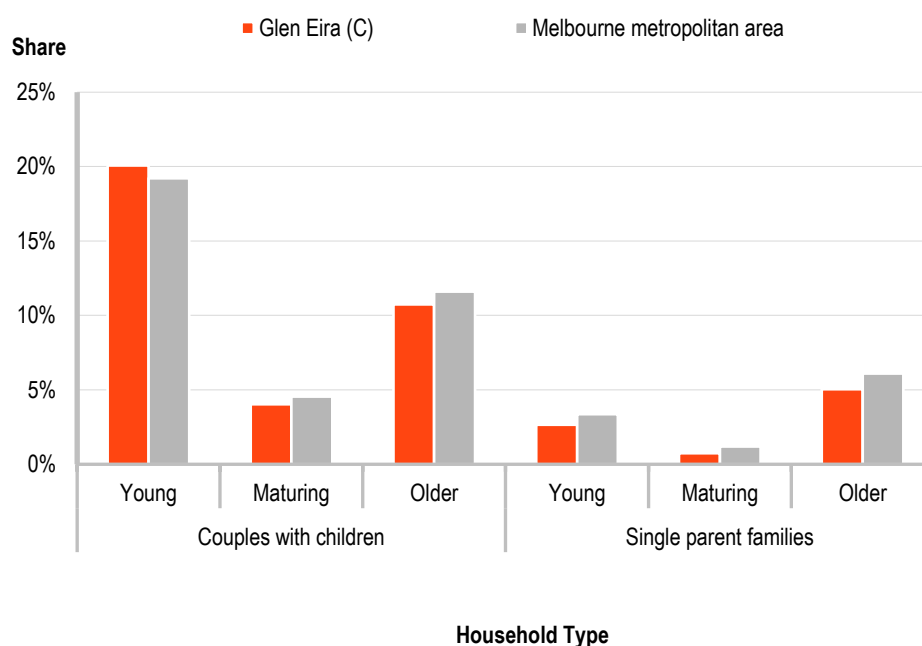
Note that couple families as recorded in the Census can include both same-sex and opposite sex couples, though the former are typically small in number.

Due to the significant number of household types when combined with the age of the household, information is presented for the larger (family) household types separately to the smaller household types.

2.2.4 Larger (family) households

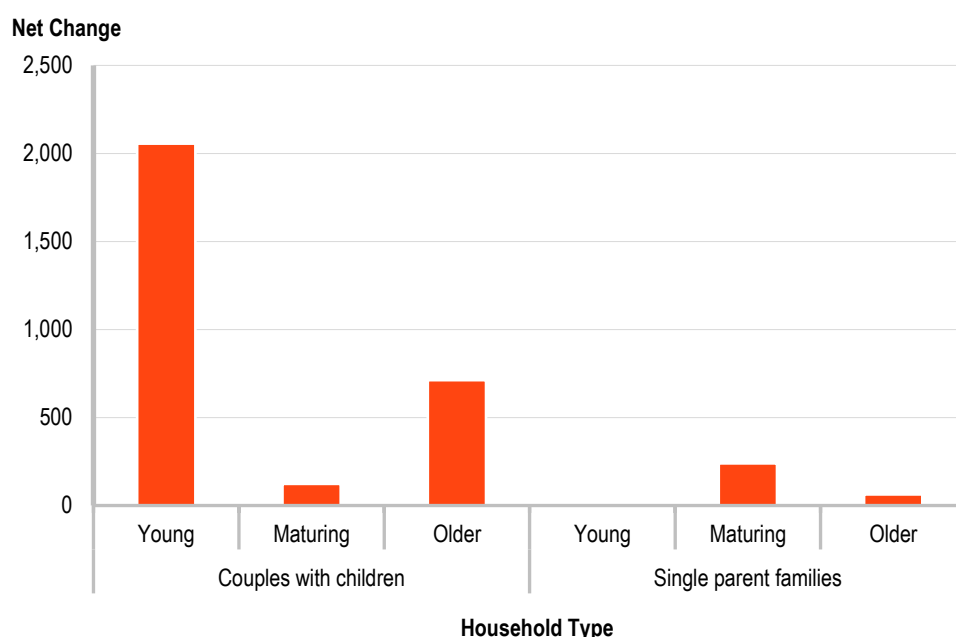
The share of family households in Glen Eira is shown below in Figure 11. As noted above, couples with children are the dominant household type in Glen Eira, comprising one-third of all households. Within family households, couples with young children (all under 15 years) are most prevalent (20.1% of all households). Compared to the Melbourne metropolitan average, the share of couples with children was slightly lower in Glen Eira.

Figure 11. Share of family household types by age, Glen Eira – 2016



Source: ABS, Census of Population and Housing (2016)

Between 2006 and 2016, there was significant change in the number of the different family household types (Figure 12). Couples with young children (all under 15 years) showed the most significant increase over the ten-year period (25%). On the other hand, single parent families showed a modest increase over the same time.

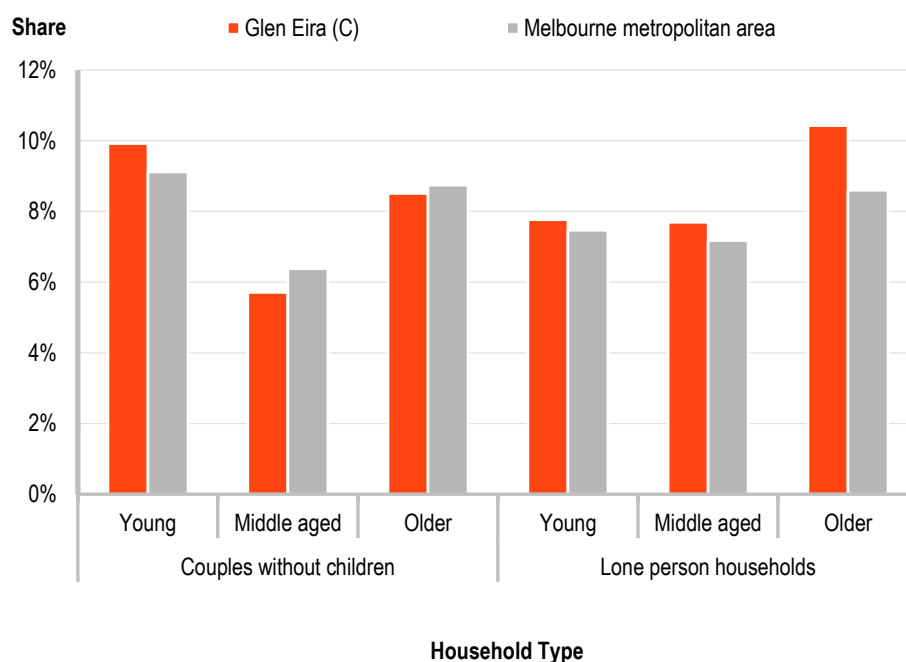
Figure 12. Net change in family households by age – 2006-2016

Source: ABS, Census of Population and Housing (2006 and 2016)

2.2.5 Smaller households

In contrast to larger households, there was no household type that was clearly dominant (Figure 13). Older lone person households (65 years and over) comprised 10.4% (one in ten) of households, followed by young couples without children (9.9%). Older couples without children, young lone person households and middle aged lone person households each comprised about 8% of households. The proportion of older lone person households was notably higher than that for the Melbourne metropolitan area (10.4% compared to 8.6%). This partly reflects some ageing of the Glen Eira population, as these types of households tend to be formed through death of a spouse, divorce or children leaving home. However, the number of older lone person households declined by 1% between 2006 and 2016, as some in this age group leave the area for retirement villages and aged care facilities, or mortality catches up with them. The proportion of young couples without children was also higher than the Melbourne metropolitan average, indicating that some areas are beginning to regenerate or be developed for residential use (e.g. Caulfield and Carnegie). In addition, their relative proximity to the CBD makes them an attractive location for young couples.

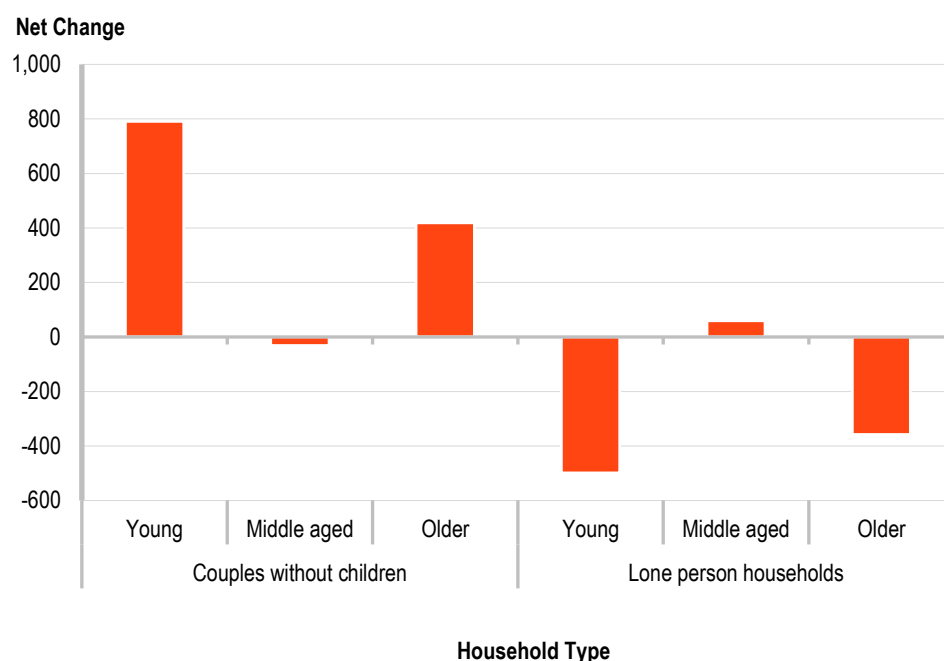
Figure 13. Share of 'smaller' household types by age, Glen Eira and Melbourne – 2016



Source: ABS, Census of Population and Housing (2016)

This gradual ageing and regeneration of the Glen Eira population is reflected in the change in the household types over the period 2006-2016 (Figure 14). The number of middle aged lone person households increased over this period. While some of this is a result of population ageing, particularly as the large baby boom cohort matures, this lone person households are also formed through family breakdown and may also reflect lifestyle choices ie a preference for living alone. Young and older couples without children also recorded modest increases over this time period.

In contrast, the smaller household types to record a decline over the period 2006-2016 were young lone person, older lone person and middle aged couple without children households. The largest decrease was in young lone persons. In 2006, they comprised 9.5% of households, but this declined to 7.8% in 2016. Again, this reflects the ageing population in Glen Eira but it is worth noting that the proportion of young lone person households also declined in metropolitan Melbourne. This suggests other factors such as housing affordability may be at play, and that these people are adjusting their living arrangements accordingly ie by becoming couple, group or even family households.

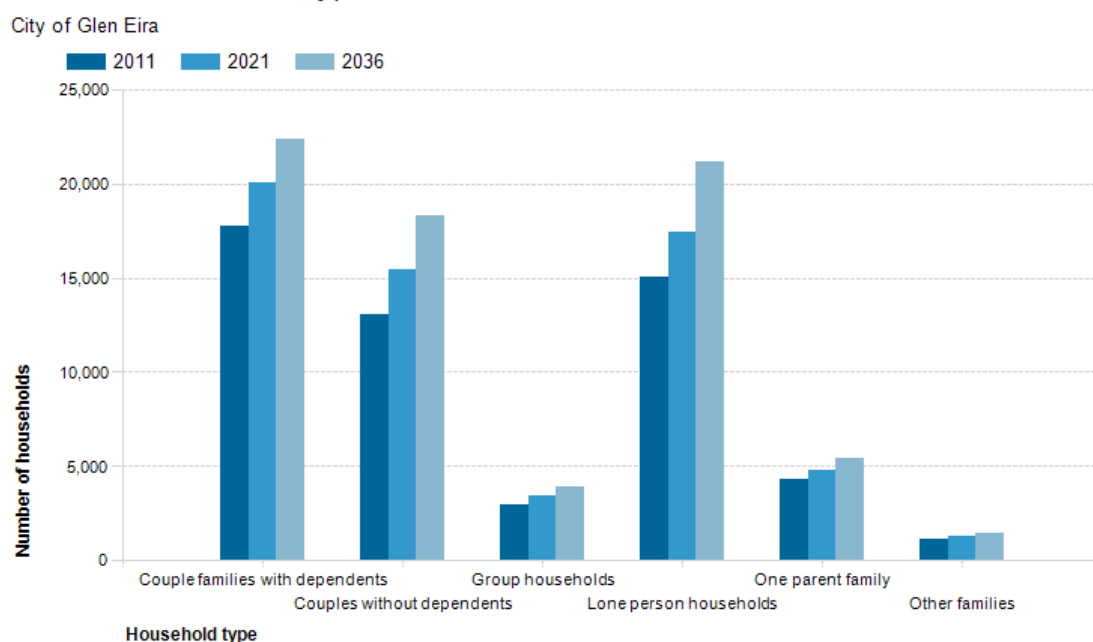
Figure 14. Net change in 'smaller' households by age, Glen Eira – 2006-2016

Source: ABS, Census of Population and Housing (2006 and 2016)

2.2.6 How will households change in the future?

Population and dwelling forecasts prepared by .id in 2015 indicate that all household types are forecast to record growth in the next twenty five years (Figure 15). This growth is assumed to occur despite the demographic trends discussed above, and relates to the identified development opportunities on strategic sites and incremental infill. Note that the household types used in the forecast.id product differ slightly from those presented in other parts of this section.

Smaller households are forecast to record the most growth, particularly lone person households and couples without dependents, both recording around 40% growth over the period 2011-36. Though these households tend to be associated with ageing populations, they can occur across the age spectrum – couples without dependents can include younger couples yet to have children. Despite this, couple families with dependents ie two parent families are still forecast to be the dominant household type in 2036, but their relatively slower growth compared to the smaller household types means that they fall from 32.6% of households in 2011 to 30.8% in 2036, despite a 26% increase in numbers.

Figure 15. Households by type, Glen Eira – 2011-2036**Forecast household types**

Population and household forecasts, 2011 to 2036, prepared by .id the population experts, November 2015.

.id the population experts

Source: forecast.id (2016)

The growth in smaller households will also result in a decline in average household size (Figure 16). In 2011, average household size in Glen Eira was 2.49 persons, but it is forecast to decline slightly to 2.42 by 2036. This is related to the ageing of the population, as well as social changes which will result in smaller households eg family breakdown.

Figure 16. Average household size¹, Glen Eira – 2011-2036

Year	Average household size
2011	2.49
2016	2.49
2021	2.47
2026	2.45
2031	2.44
2036	2.42

Source: forecast.id (2015)

2.3 How is the dwelling stock changing?

In Australian cities, separate dwellings with three or more bedrooms are the most prevalent and typically provide for larger households. Housing policy throughout Australia now calls for greater housing diversity and the facilitation of higher-density development to address the sustainability challenges inherent in ever expanding urban areas. This might be implemented via policy measures which encourage more development around public transport nodes and activity centres in order to make better use of existing services and infrastructure. A highly visible change to dwelling stock, particularly in the central cities and inner suburbs, is the increase in apartments. Glen Eira, having developed over many decades, contains a range of housing types and densities, from separate houses on single blocks, to multi-dwelling units, and an increasing number of higher density apartments around key transport nodes at Caulfield, Carnegie and Elsternwick. This section examines how Glen Eira compares to the Melbourne metropolitan area, and how densities – as measured through the dwelling structure and number of bedrooms per dwelling – are changing.

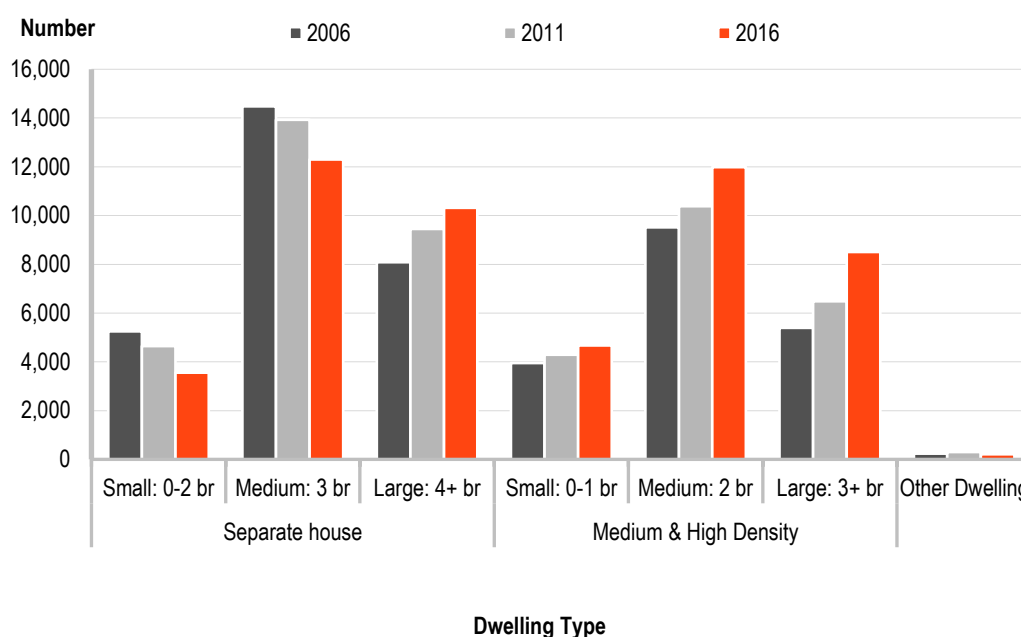
In 2016, there were 54,751 occupied private dwellings in Glen Eira. Almost half (49.9%) of these were separate houses (Figure 17). When the data is considered by number of bedrooms, separate houses with three bedrooms are the most common (22.5%), followed by medium and high density dwellings with two bedrooms (21.9%) and separate houses with four or more dwellings (18.8%). However, over the period

¹ Average household size in Figure 16 is based on the Estimated Resident Population at 2011. This results in a different figure to that obtained if the calculation is based on the Census population, as per the data on page 15.

2006-2016 there was a decline in the number of separate houses with three or fewer bedrooms, but strong growth in those with four or more bedrooms. At the same time, the total number of separate houses showed minimal change over the ten years, indicating that the growth in dwellings with four or more bedrooms likely occurred through renovation or replacement of older/sub-standard housing with a new dwelling (“knock down replace”).

Compared to metropolitan Melbourne, Glen Eira had a lower proportion of separate houses (49.9% compared to 66.8%). Though the number of occupied private dwellings in Glen Eira increased by 9% over the period 2006-2016, there was a marked difference between separate houses and medium and high density dwellings. The former in fact decreased by 7% over the ten years, compared to an increase of 30% for medium and high density dwellings. Of all the dwelling types, medium and high density dwellings with three or more bedrooms recorded the strongest growth between 2006 and 2016 (57.5%).

Figure 17. Dwellings by type, Glen Eira – 2006-2016

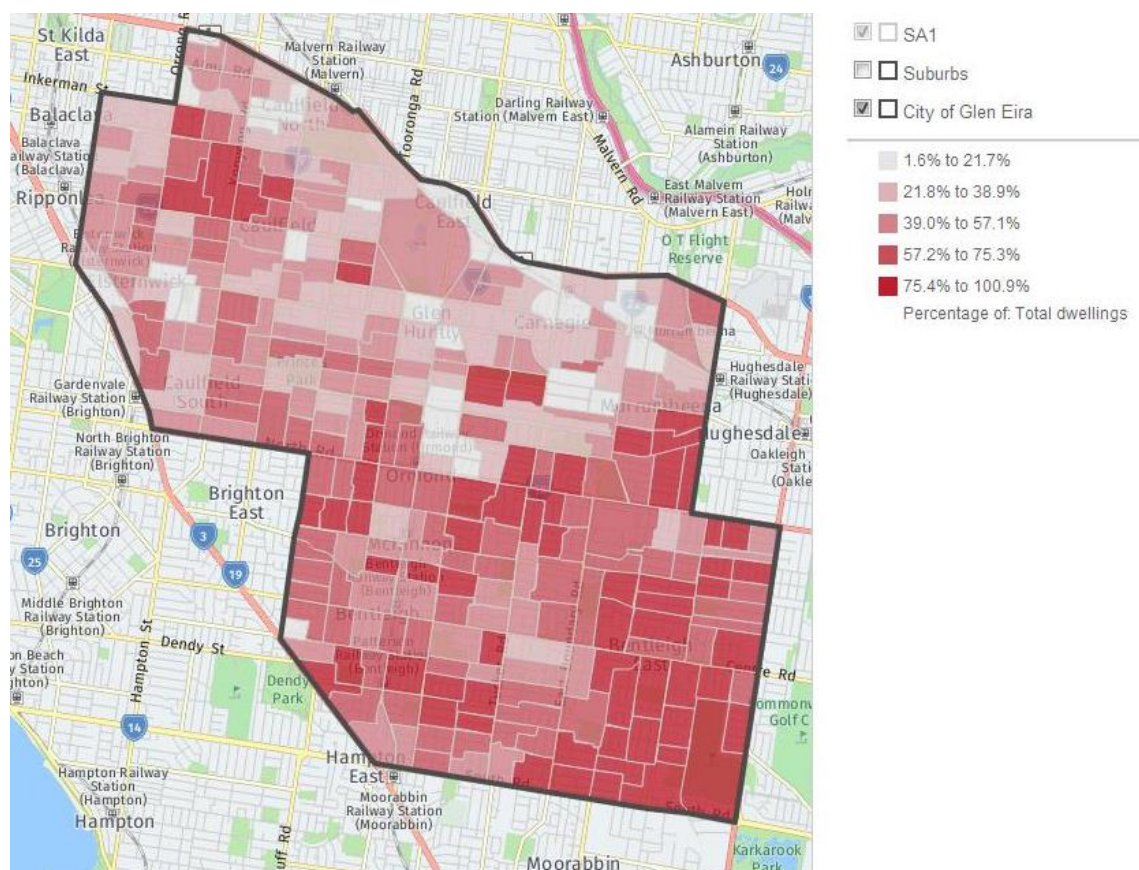


Source: ABS, Census of Population and Housing (2006-2016)

Dwelling types vary widely across the City and again this is indicative of the urban development of Glen Eira over many decades (Figure 18). In 2016, the highest proportion of separate houses were found in Bentleigh East (71.5%), McKinnon (64%) and Bentleigh (61%). All these suburbs developed primarily in the post war period in the classic “quarter acre block” style. Due to its location along the Frankston train line, in more recent years some of these larger blocks in Bentleigh

and McKinnon have been redeveloped as dual occupancies or the original dwelling has been replaced with smaller townhouses or villa units. This acts to change the dwelling type mix incrementally over time.

Figure 18. Proportion of separate houses by SA1, Glen Eira – 2016



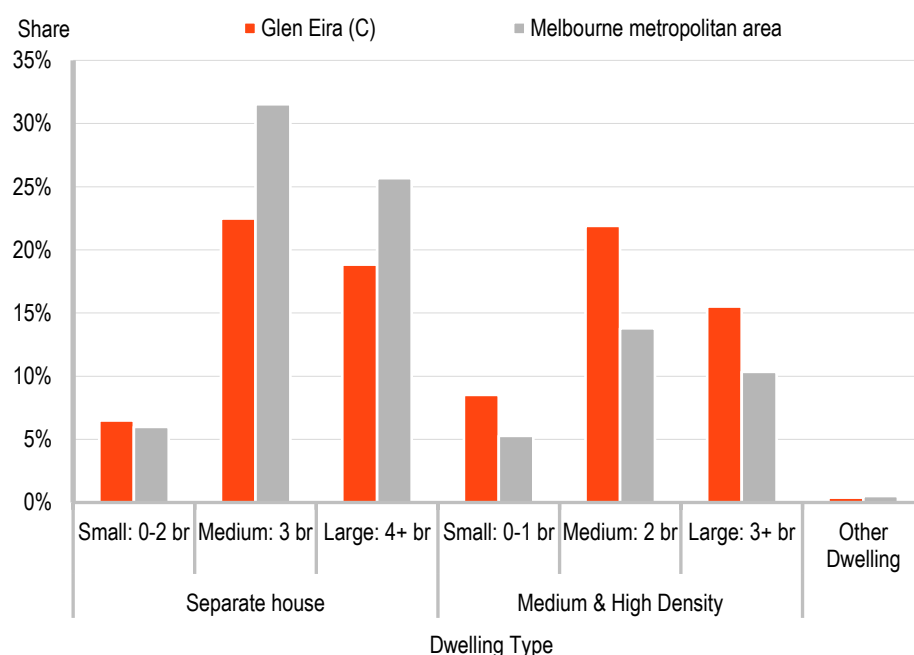
Source: ABS, Census of Population and Housing (2016), compiled and presented in atlas.id

In contrast, only 24% of dwellings in Glen Huntly were separate houses, a further 61% were medium density dwellings and 13.5% were high density dwellings. The suburb's location on key public transport routes (train and tram) as well as relatively proximity to the CBD and Monash Caulfield have made it a focus of redevelopment over a number of decades. In particular, the area to the east of the railway line and out to Grange Road has been extensively redeveloped with many villa units and townhouses, while closer to the station there are a number of 1960s and 1970s “walk up” apartment blocks.

The dwelling profile for Glen Eira shows distinct variations to that of the Melbourne metropolitan area (Figure 19). Glen Eira has quite a high level of dwelling diversity, with much higher proportions of medium and high density housing than the

metropolitan Melbourne average. While separate houses still hold the majority, they are smaller than the Melbourne metropolitan average, with more houses having three or fewer bedrooms. Housing in Glen Eira is much more likely to be medium or high density dwellings, such as townhouses and apartments. These are larger than many found in Melbourne, with 15.5% having three or more bedrooms, compared to 10.3% across the metropolitan area.

Figure 19. Share of dwelling type, Glen Eira and Melbourne – 2016



Source: ABS, Census of Population and Housing (2016)

Over time there has been a trend in Glen Eira for dwellings to contain more bedrooms. This was particularly true of separate houses. As mentioned above, the number of these dwellings showed minimal change between 2006 and 2016. However this masks strong growth in separate houses with four or more bedrooms, but a decline in the number of separate houses with three or fewer bedrooms. This indicates the growth in four bedroom separate houses is a result of home renovation or knock down replace developments of older and sub-standard housing. It is also part of the Australia wide trend towards larger homes, a trend which may not be environmentally sustainable. Factors which influence this trend include:

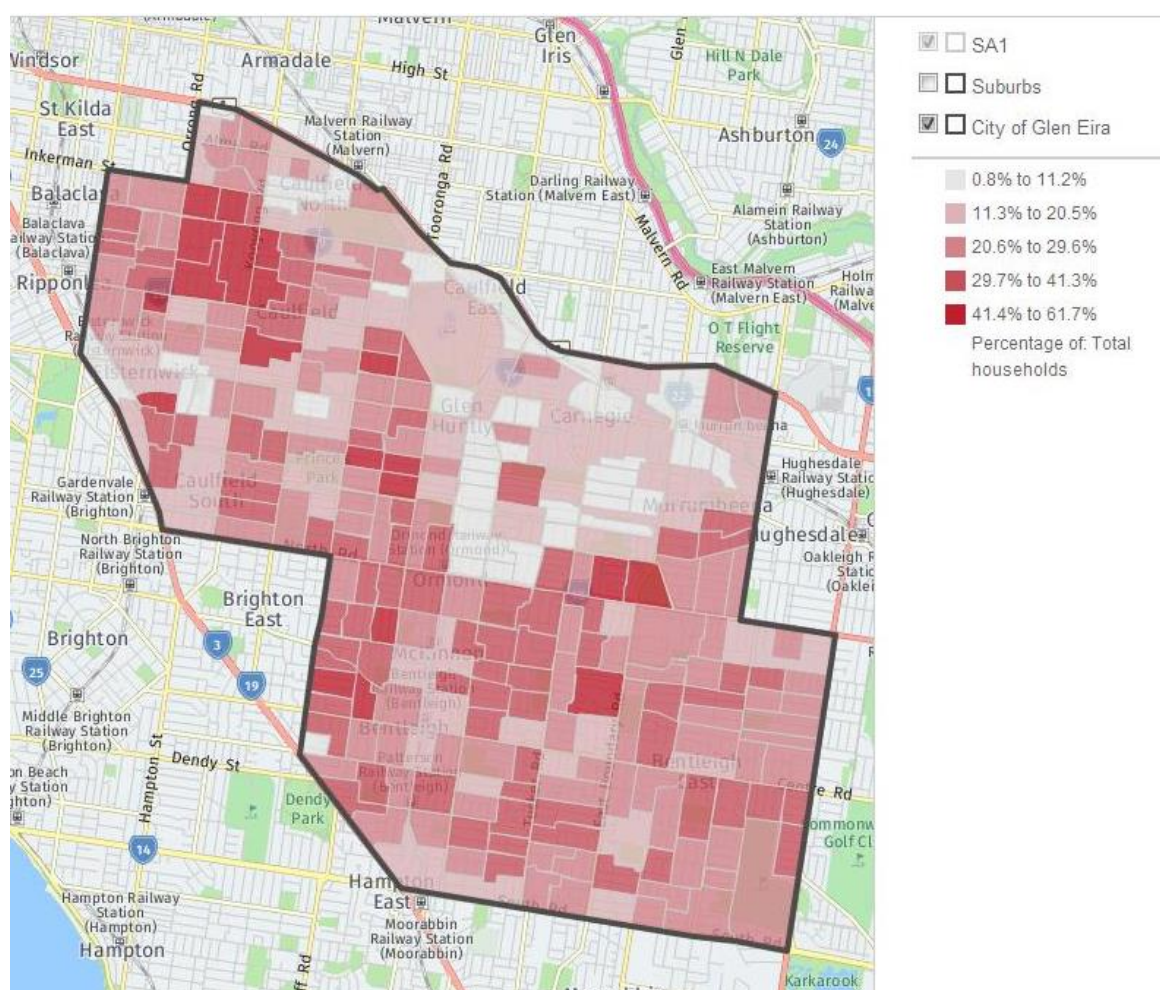
- ▣ The desire for space - to work from home, to provide a bedroom for every child (including those in separated families) or the desire for a spare room for visitors and family;
- ▣ Higher developer profits from large format housing;

- ▾ Increased affluence;
- ▾ The perception of increased capital gain from buying or renovating larger homes.

There was growth in all medium and high density dwelling types, but again, the stronger growth was for those with three or more bedrooms. This dwelling type increased by 58% between 2006 and 2016, such that they comprise one in eight dwellings in Glen Eira. Growth in smaller medium and high density dwellings was around 8% over the ten years. Many of the more recent high density developments contain smaller apartments with one or two bedrooms, which is contributing to their growth. Nevertheless it is clear that there is a preference for dwellings with more bedrooms, regardless of whether they are separate houses, medium or high density dwellings.

The spatial distribution of dwellings with four or more bedrooms is shown below in Figure 20. The highest concentration of dwellings with four or more bedrooms is in the north west sector of the municipality, particularly in Caulfield North. In the area bounded by Kooyong, Balaclava, Orrong and Glen Eira Roads more than half the dwellings had four or more bedrooms. On the other hand, parts of Glen Huntly, Carnegie and Murrumbeena, particularly along the railway lines, had very low proportions of dwellings with four or more bedrooms.

Figure 20. *Proportion of dwellings with four or more bedrooms, by SA1, Glen Eira – 2016*



Source: ABS, Census of Population and Housing (2016), compiled and presented in atlas.id

The trend away from smaller homes is interesting in light of declining average household size and the increase in smaller households, particularly those occupied by one person. Again, this reflects wider trends in the Australian urban housing market, but it has created concern in some circles that one and two person households are “over consuming” the dwellings in which they reside. These

concerns fail however to consider the social and demographic environment in which household types are created, such as the suburban lifecycle.

Figure 21. Change in dwelling types by number of bedrooms, Glen Eira – 2006-2016



Source: ABS, Census of Population and Housing (2006 and 2016)

2.4 What dwellings do households live in?

This section identifies the dominant and emerging household types, and looks at the types of dwellings in which they live. The dominant household type is the category with the highest share of households at the 2016 Census, while an emerging household is that with the highest increase in absolute numbers between 2006 and 2016.

While there is little qualitative data on housing preference, Census data enables detailed analysis of dwelling consumption by household type to show preferences in the context of supply constraints. Revealed preferences are the types of dwellings that households actually live in, as indicated by Census data. Expressed preferences are those stated by individuals when surveyed as to what sort of housing they would like to live in. The latter is not part of the scope of this report, but there are examples of this type of research being undertaken in Australia, such as the Grattan Institute's 2011 report "The housing we'd choose".

This analysis uses Census data to identify the relationship between key dominant and emerging household types and the dwellings they live in. The following household types are analysed:

- ▣ Couples with young children (dominant and emerging)
- ▣ Couples with older children (dominant and emerging)
- ▣ Young couples without children (dominant and emerging)
- ▣ Maturing lone person households (emerging)
- ▣ Older lone person households (dominant)

2.4.1 Couples with young children

Couples with young children (all under 15 years of age) are the dominant household type in the City of Glen Eira, comprising 20.1% of the total. Their numbers increased by 19.2% between 2006 and 2016. As a result, couples with young children were both the dominant and emerging household type in the City of Glen Eira.

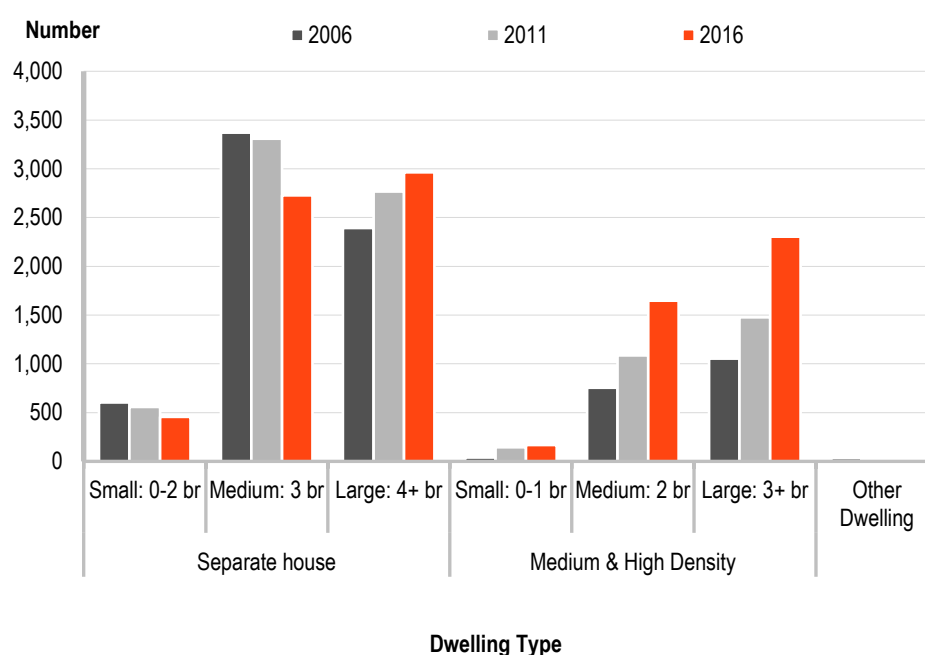
Typically, these households fall into three housing markets:

- ▣ Those early in housing career who are buying their first home and may be spending large proportions of their income on housing costs;
- ▣ Second and third home-purchasers moving to larger dwellings more distant from the city centre that are more suitable to their changing needs;
- ▣ Those living in higher density dwellings, both renters and buyers, who have just had their first child.

In terms of dwelling type, *couples with young children* were most likely to be living in separate houses with four or more bedrooms, with a significant increase over the ten years between 2006 and 2016 (Figure 21). On the other hand, the numbers living in separate houses with three bedrooms decreased slightly. There was also a significant increase in those living in medium and high density dwellings with either two; or three or more bedrooms. Given the stability in the number of *couples with young children* this suggests that there may have been renovation of existing stock to adapt the requirements of modern living, or may simply reflect a preference for more space.

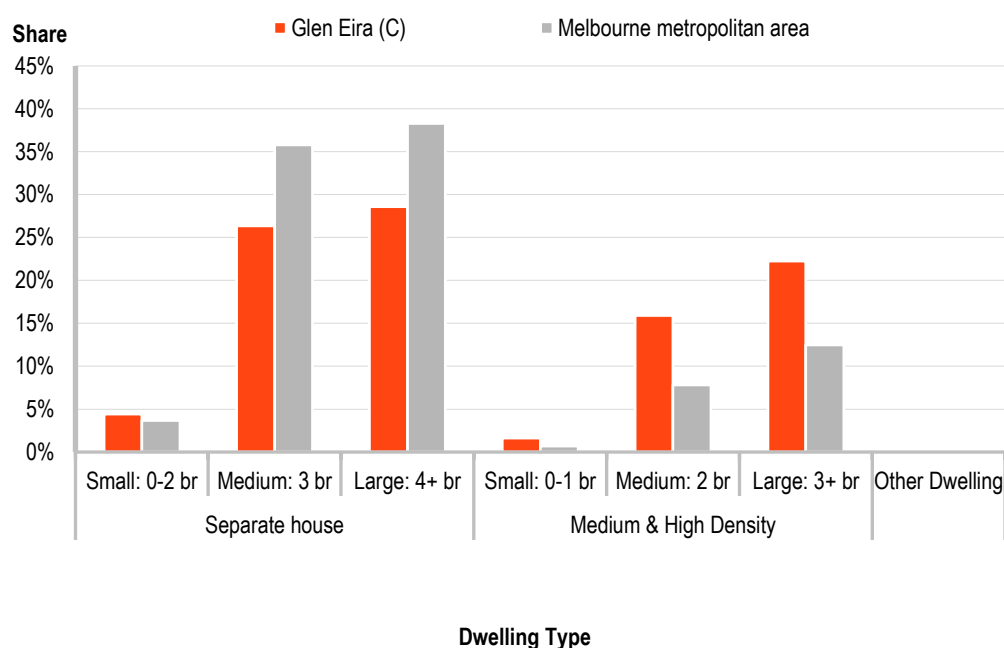
Increasing numbers of these households spur demand for children's services and diversify established areas. They also help maintain population levels, as their household size is more likely to grow in the short term. However, it is often difficult for inner urban areas to retain this household type due to the nature of the dwelling stock as many houses have only two bedrooms, or are on a small block with minimal private outdoor space. Generally, the birth of a second or third child triggers an outwards move to a larger home in the outer suburbs.

Figure 22. Couples with young children, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

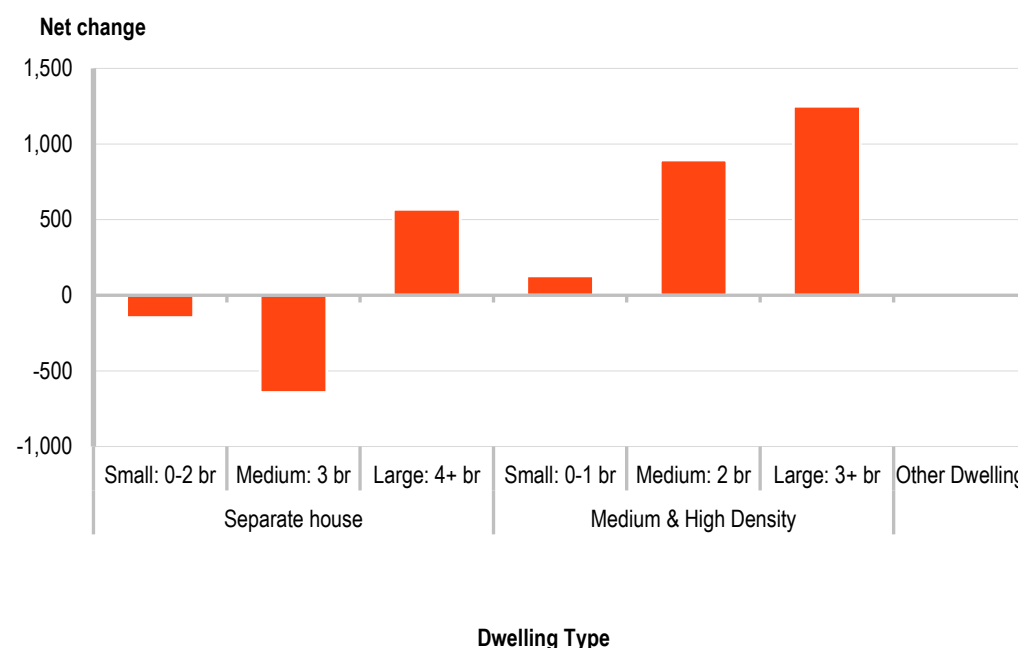
In 2016, just over half (55%) of couples with young children lived in separate houses with three or more bedrooms (Figure 23). This was lower than the Melbourne metropolitan average of 74.1%. This largely reflects the differences in the dwelling stock – as mentioned above, three bedroom separate houses are the dominant dwelling type in the City of Glen Eira, however more recently the municipality has experienced rapid growth in the number of houses with four or more bedrooms. Similarly, a higher proportion of couples with young children live in medium and high density dwellings in the City of Glen Eira compared to metropolitan Melbourne (38.2% cf 20.3%). This is simply due to the range of housing choices available, particularly the greater proportion of medium and high density dwellings with two or more bedrooms compared to metropolitan Melbourne.

Figure 23. Couples with young children by dwelling type (%) – 2016

Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

In terms of net change between 2006 and 2016 (Figure 24), larger increases were experienced in dwellings with greater number of bedrooms, regardless of whether it was a separate house or medium/high density. Larger dwellings are clearly more suitable for family households so where they are available and affordable, there is a preference for families to live in these types of dwellings.

Figure 24. Net change in couples with young children, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

2.4.2 Couples with older children

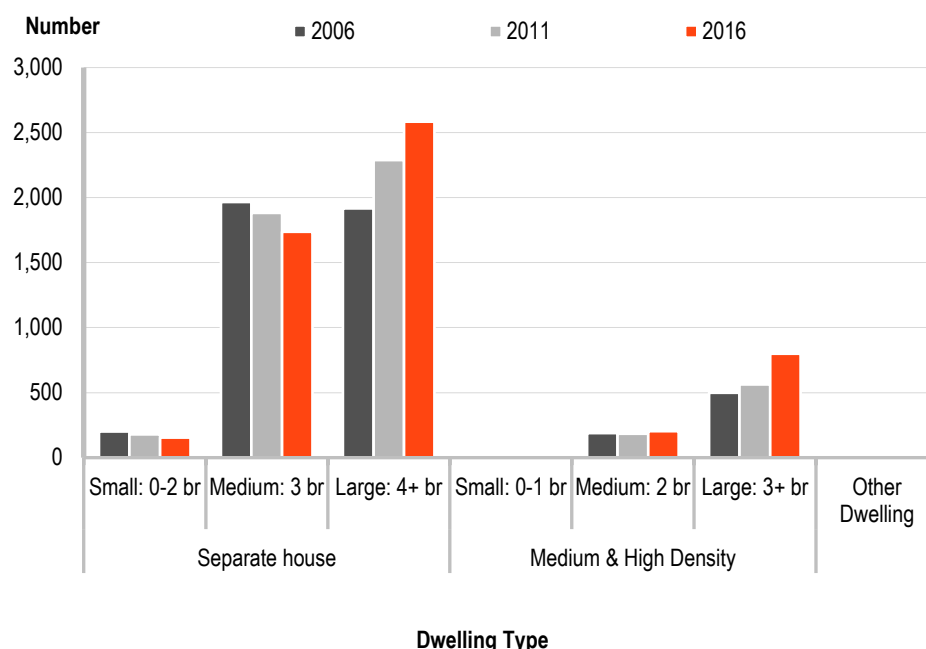
Couples with older children, ie all over 15 years, share many similarities to their younger counterparts discussed in the previous section, but they are far more advanced in their housing careers and in the suburban lifecycle. They are more likely to have lived in the same dwelling for a longer period of time as household mobility tends to decline with age, but also as households become established within the community and their needs become more tied to what happens locally, eg children reaching the final years of high school. Their service needs are likely to be different due to their older age structure.

As shown in Figures 25 and 26, *couples with older children* overwhelmingly live in separate houses (81.4% in 2016), with the majority living in houses with four or more bedrooms (46.6% of total couples with older children households). A further 31.3% live in separate houses with three bedrooms. In common with their younger counterparts, there was little change in the number of *couples with older children* households between 2006 and 2016.

In 2016, 78% of couples with older children lived in separate houses with three or more bedrooms, which was lower than the Melbourne metropolitan average of

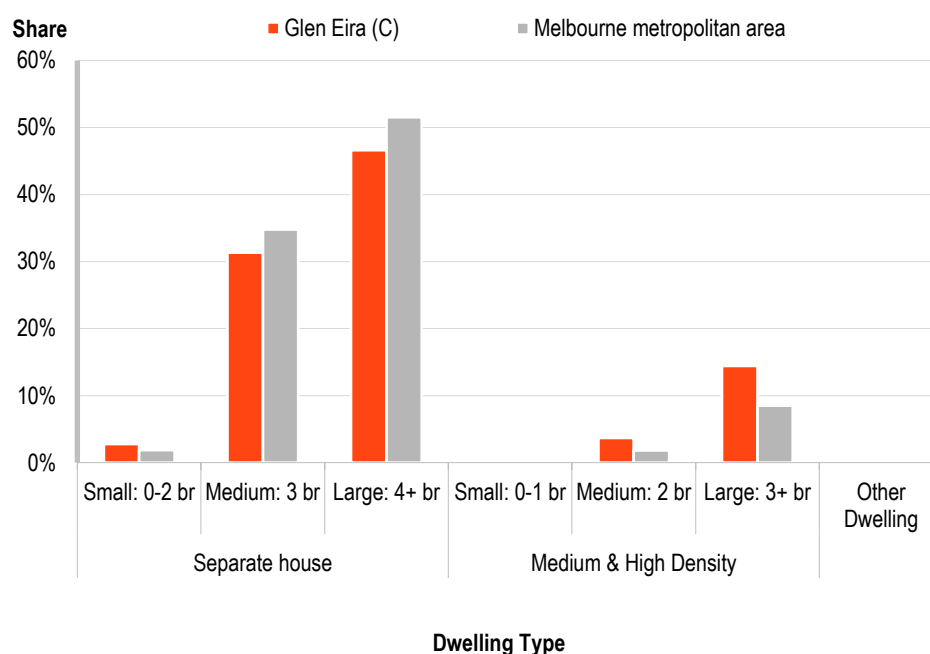
86.3%. As mentioned above, this largely reflects the differences in the dwelling stock between the City of Glen Eira and wider metropolitan Melbourne.

Figure 25. Couples with older children, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

Figure 26. Couples with older children by dwelling type, Glen Eira – 2016



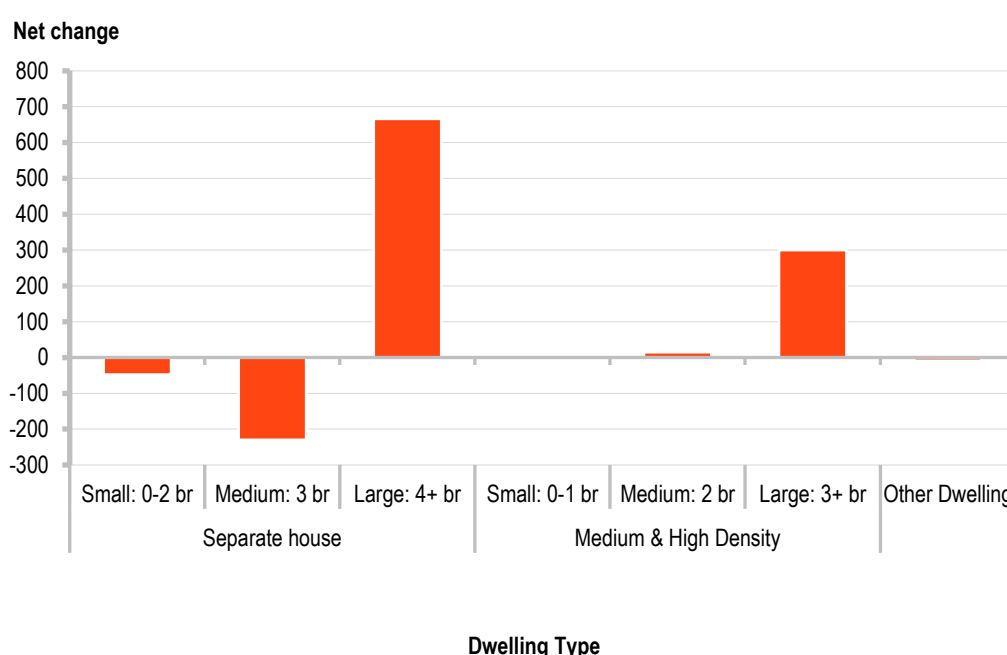
Source: ABS, Census of Population and Housing (2016)

Between 2006 and 2016, there was a strong trend towards separate dwellings with more bedrooms (Figure 27). While the number of *couples with older children*

households living in separate houses with three bedrooms declined by 11.7% over the ten years, those in separate houses with four bedrooms increased by 34.7%. Again, this is likely to be a result of home renovation, adding new bedrooms to existing household stock.

There was also an increase (44.4%) in the number of *couples with older children* households living in medium and high density housing, with the largest increase in larger households with 3 or more bedrooms (60%).

Figure 27. Net change in Couples with older children by dwelling type, Glen Eira – 2006-2016



Source: ABS, Census of Population and Housing (2006 and 2016)

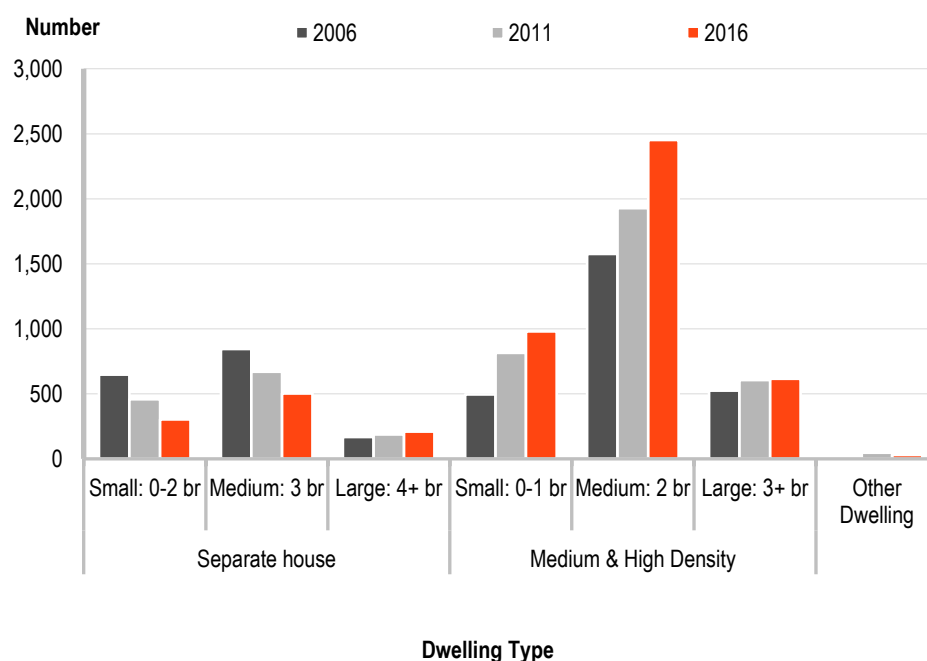
2.4.3 Young couples without children

Young couples without children are early in their housing careers and may be prepared to accept high levels of housing stress to enable them to enter the housing market. This household type is also prepared to compromise on the format of their dwelling to achieve affordability. They are an important group to attract, particularly for well-established areas, as they have a high propensity for having children, therefore providing demand for children's services in the future. They play a key role in diversifying well established areas and maintaining population levels as they are likely candidates to have a growing average household size. Within Glen Eira, young couples with children tend to be concentrated in Caulfield, Caulfield North – Caulfield East, Carnegie, Glen Huntly, Murrumbeena, Ormond and Elsternwick. These areas

all have good access to public transport via the Cranbourne and Pakenham, Frankston, and Sandringham railway lines, as well as relative proximity to the CBD and access to other services such as retail/education.

Despite their smaller household size, young couples without children display similar housing preferences to couples with young children. The growth in young couples without children between 2006 and 2016 meant that all medium and high density dwelling types recorded increases over the ten years, particularly dwellings with two or fewer bedrooms (Figure 28). This largely reflects the relative affordability of the dwelling stock in the municipality.

Figure 28. Young couples without children households, by dwelling type – 2006-2016

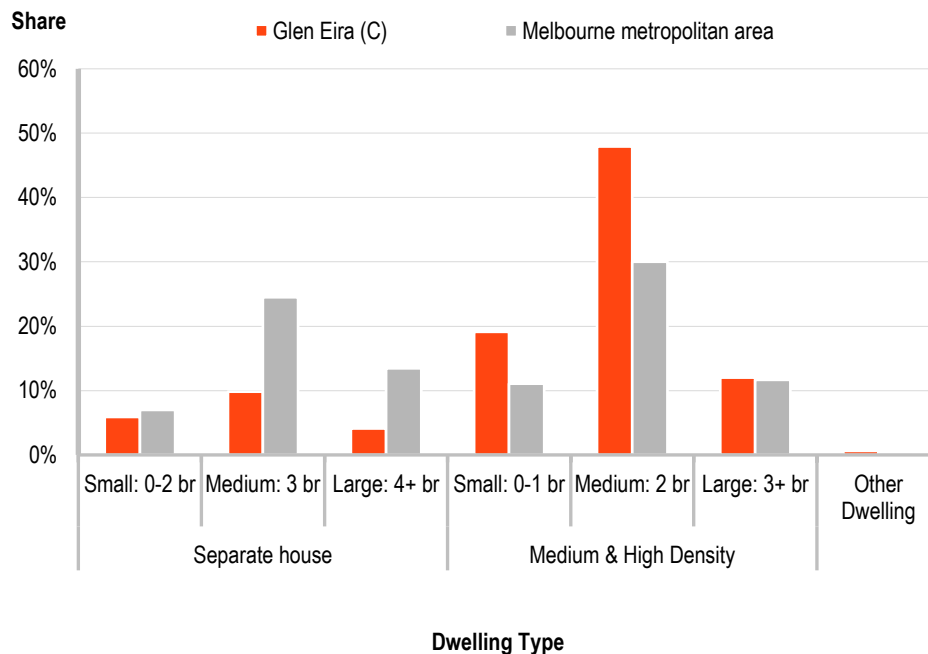


Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

Figure 29 shows that compared to the Melbourne metropolitan area, young couples without children have a greater propensity to live in medium and high density dwellings (around 79.0% compared to 53.4% for metropolitan Melbourne). Furthermore, for this household type, the differences in the propensity to live in medium and high density dwellings with two or fewer bedrooms is even greater with 67% in the City of Glen Eira compared to 41.1% for metropolitan Melbourne.

In contrast, in the City of Glen Eira this household type is far less likely to live in separate houses, especially those with three or more bedrooms (20.1% compared with 45.8% for metropolitan Melbourne).

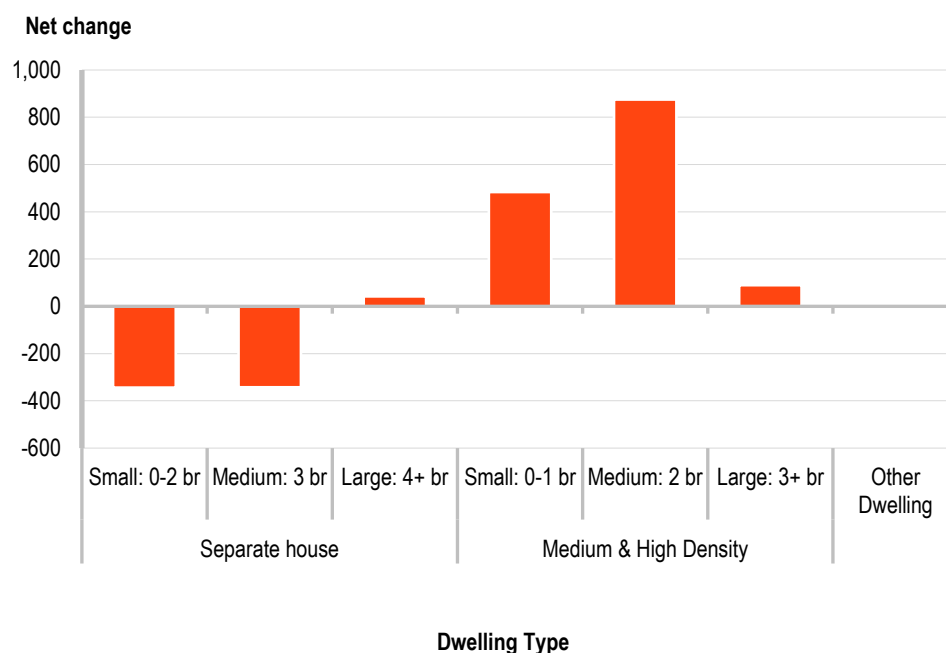
Figure 29. Young couples without children by dwelling type (%) – 2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

Because of the increase in this household type over the ten years, all medium and high density dwelling types recorded increases over the period 2006 to 2016. On the other hand, there was a decline in separate houses particularly for those with three bedrooms or fewer.

Figure 30. Net change in young couples without children, by dwelling type – 2006-2016

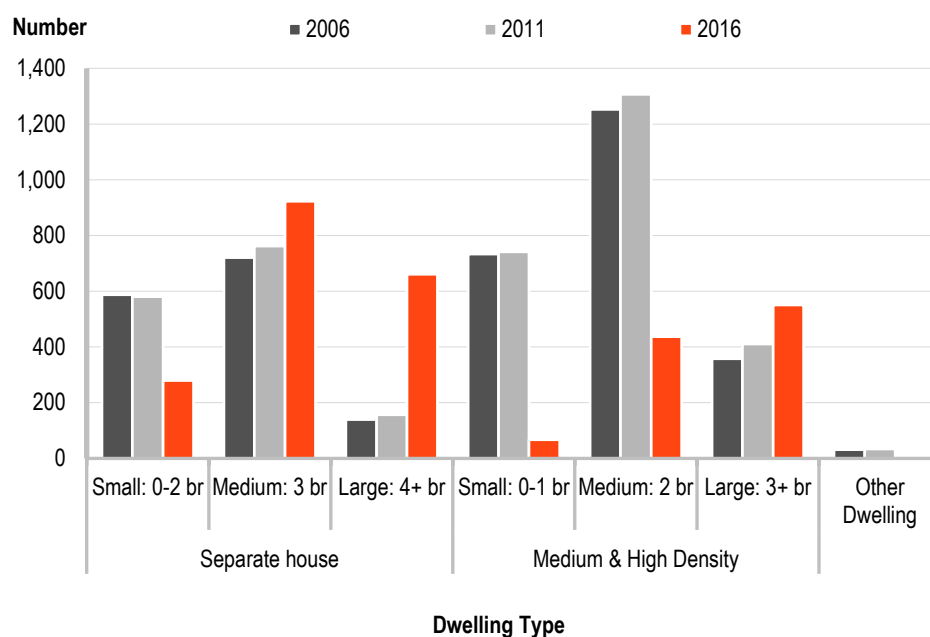


Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

2.4.4 Maturing lone person households

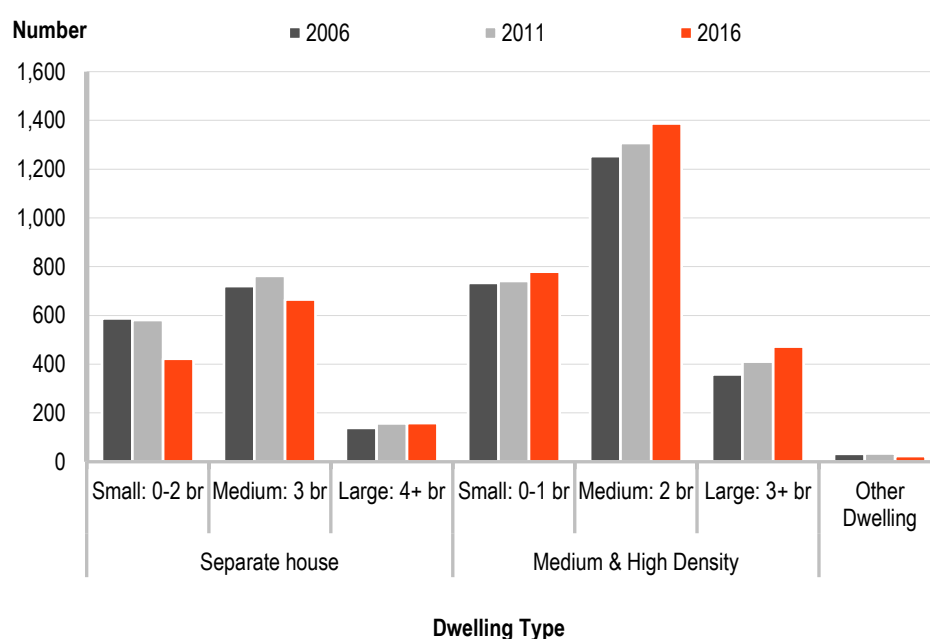
Maturing lone person households are often not analysed in detail in housing analysis, however, they were the type of only lone person household type to record an increase in the City of Glen Eira between 2006 and 2016. This increase is partly the result of ageing in place of younger lone person households, children leaving the home of a single parent (“empty nesters”), but also due to family breakdown. This tends to create a smaller household unit which might consist of one parent leaving the family home to live elsewhere. These types of households are more advanced in their housing careers and are therefore more likely to have greater housing equity allowing them more choice in the property market. They also may have existing social ties to the community that influences their housing choice.

Over the ten years between 2006 and 2016 *mature lone person households* became more likely to live in larger dwellings (Figure 31), with large increases in separate houses with three or more bedrooms, as well as larger medium and high density dwellings. Again, this reflects the available housing stock but may also reflect processes of ageing in place (children leaving the family home), or family breakdown (need for more bedrooms for joint custody arrangements).

Figure 31. Middle aged lone person households, by dwelling type – 2006-2016

Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

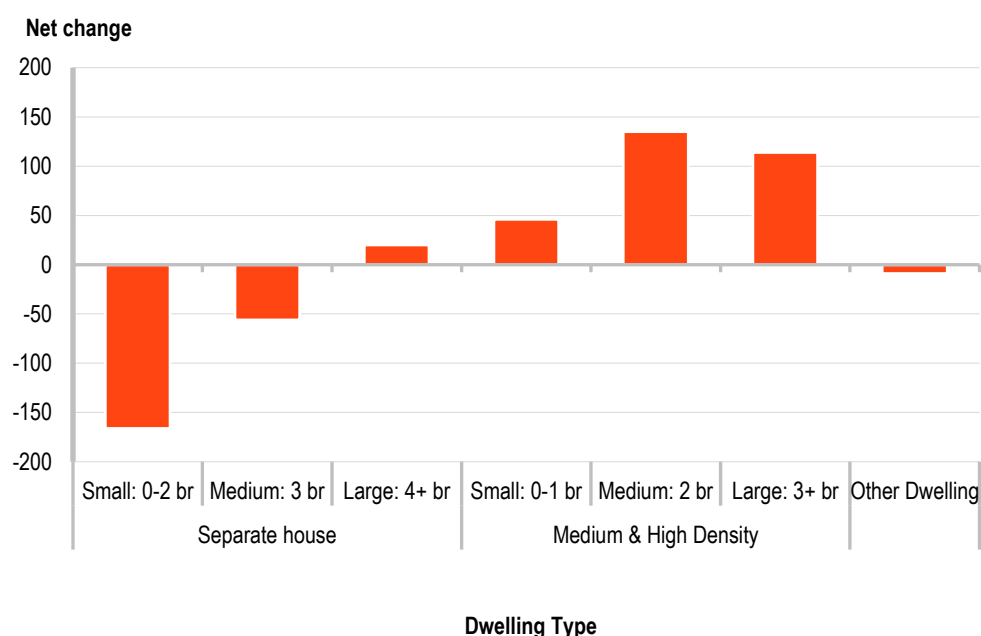
Compared to metropolitan Melbourne, mature lone persons in the City of Glen Eira are far less likely to live in separate houses, particularly those with three or more bedrooms. In contrast, these types of household are considerably more likely to live in medium and high density dwellings (Figure 32).

Figure 32. Middle aged lone person households, by dwelling type (%) – 2016

Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

As shown in Figure 33, between 2006 and 2016, the number of *mature lone person households* increased in almost all dwelling types, particularly medium/high density dwellings with three or more bedrooms, but also separate houses (regardless of the number of bedrooms).

Figure 33. Net change in middle aged lone person households, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

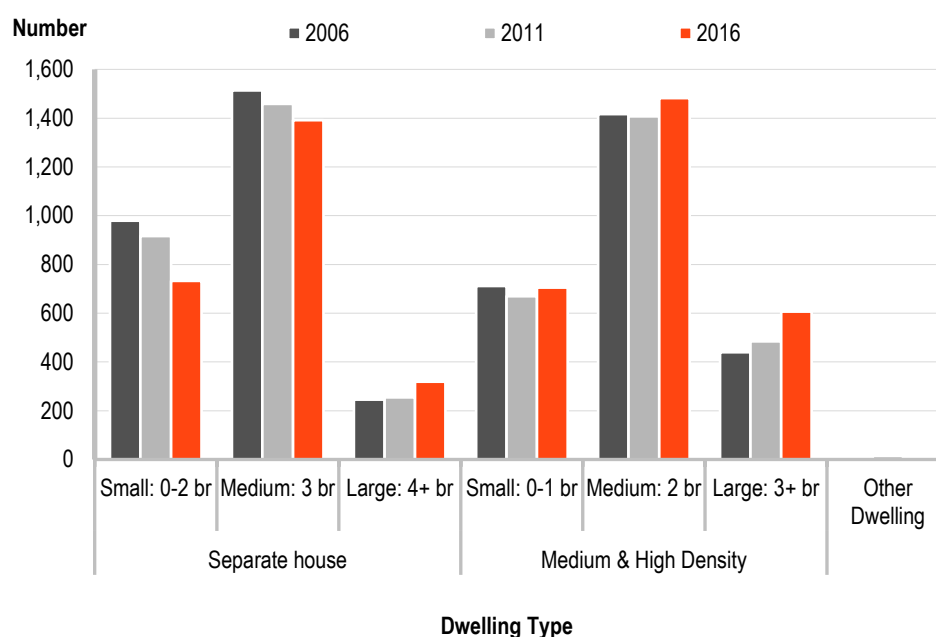
2.4.5 Older lone person households

Despite macro level demographic trends indicating a gradual ageing of the population, the number and proportion of persons aged 65 years and over in the City of Glen Eira declined between 2006 and 2016. This decline is a result of out migration, but also mortality and the fact that very elderly persons – those born in the 1920s and 1930s is smaller in size due to low fertility of the time. Despite these factors, *older lone person households* remain one of the dominant household types in Glen Eira, comprising 10.4% of total households ie about one in ten. This household type is generally concentrated in Caulfield North – Caulfield East, Carnegie and Bentleigh and Bentleigh East.

The housing profile for older lone person households also shows the preference for larger dwellings. Between 2006 and 2016 the largest increase for this housing type

was medium and high density dwellings with three or more bedrooms, the next largest increase was for separate houses with 4 or more bedrooms (Figure 34). Other dwelling types experienced a decline of over the ten years, which reflects the overall decline in *older lone person households* in Glen Eira over the same period.

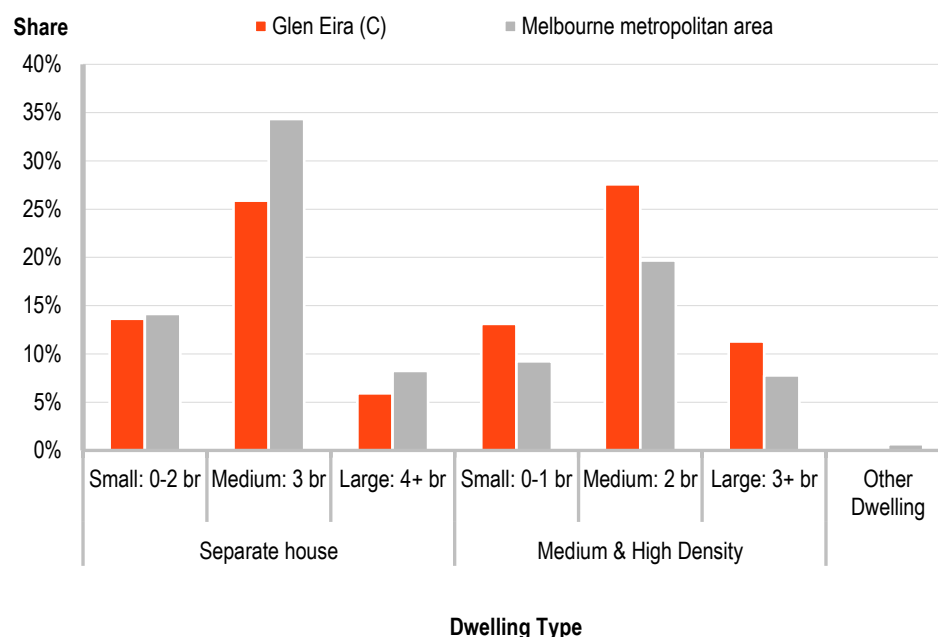
Figure 34. Older lone person households, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

As shown in Figure 35, *older lone persons households* in the City of Glen Eira showed a far greater propensity to live in medium and high density dwellings, and accordingly a much lower propensity to live in separate houses compared to the Melbourne metropolitan average.

Additionally, the most common types of dwelling for *older lone person households* are two bedroom medium and high density dwellings (27.6%), closely followed by three bedroom separate houses (25.9%).

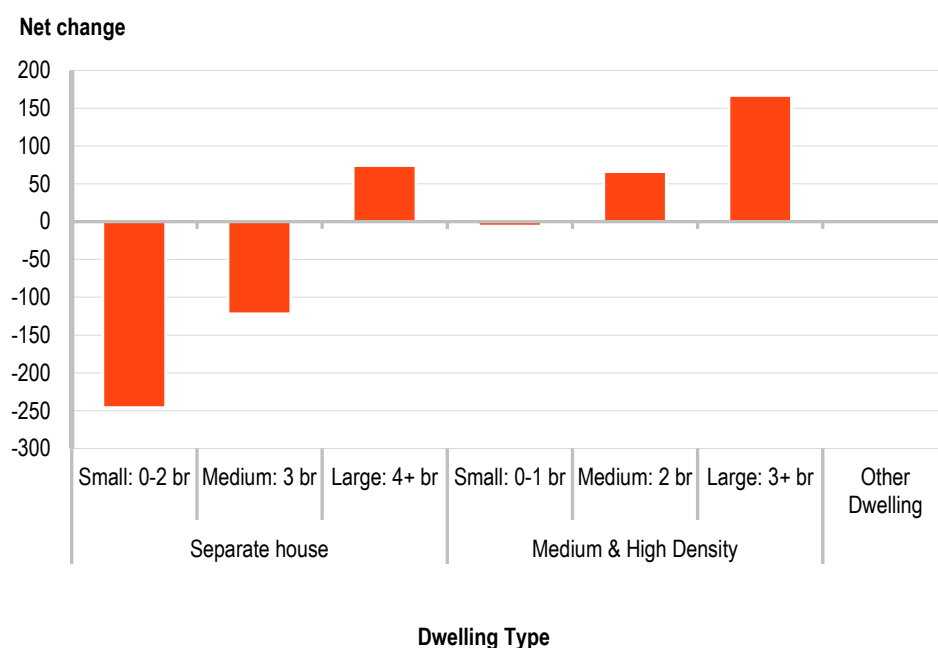
Figure 35. Older lone person households, by dwelling type (%) – 2016

Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

There is a widespread perception that older households will downsize in line with their housing needs, and that if they age in place in the family home then they are “overconsuming” dwellings. However, downsizing takes many forms and can involve a move to a smaller dwelling, which may be a unit rather than a separate house, or it may simply be a smaller house with fewer bedrooms. In many parts of Australian cities older households are bucking this perception. In line with trends for other household types, there was an increase in the number of *older lone person households* living in larger dwellings.

Between 2006 and 2016, there was a decline in the number of *older lone person households* living in separate houses with 0-2 bedrooms, as well as those in living in medium sized dwellings (Figure 36).

Figure 36. Net change in older lone person households, by dwelling type – 2006-2016



Source: ABS, Census of Population and Housing (2006, 2011 and 2016)

2.5 Policy implications

Housing policy frameworks generally try to match future supply with expected changes in demand. This section examines some of the critical housing trends identified in the previous analysis and what this might mean for housing policy on the ground.

2.5.1 Regeneration

Glen Eira is a diverse community, encompassing a range of household types that are at different stages of both the household and suburban lifecycles. This reflects the nature of urban development in the municipality, which has spanned a number of decades.

During the 1960s and 1970s, many areas in the north of the municipality including Caulfield, Carnegie, Glen Huntly and Ormond were subject to large scale redevelopment as single storey units and two storey walk up flats. This resulted in a significant diversity of dwelling types in the City catering for a wide range of housing types.

More recently, there has again been regeneration and gentrification in areas with around transport and education and in proximity to the CBD, including Caulfield, Carnegie and Elsternwick. This has had a strong impact on both the demographic and social structure in these areas.

As shown in Figure 2 (page 9), between 2006 and 2011, and again between 2011 and 2016 there were substantial shifts in the age structure. The number of young adults (particularly 25-29 year olds) increased between these two time periods, as did the proportion (from 7.1% to 8.0%). In contrast, older adults ie 70-84 years declined from 9.8% in 2006 to 8.2% in 2011.

The regeneration process in Glen Eira is largely triggered by the changing needs of households as identified in Figures 7 and 8. Policies that may facilitate the regeneration process include providing suitable housing for:

- **Ageing households.** It is an established fact that household mobility declines with age, suggesting that many older people “age in place”. This means that many stay in the family home as long as possible. Retirement villages and other accommodation catering to older persons developed locally means that older people can downsize to smaller dwellings without losing ties to their local communities and networks.
- **Young households.** People in their twenties and early thirties are the most mobile households as this is a stage of life coinciding with important migration triggers such as moving out of home, marriage and having children. The needs of young households are diverse – the movement of young families into established suburbs suggests that regeneration is occurring, but at the same time, other young households are influenced by other factors such as the inner city lifestyle as well as access to employment and education, particularly in Caulfield, Carnegie and Elsternwick. Additionally, apartments and units provide an opportunity for younger people to gain a foothold in the property market, a factor that is becoming critical with decreasing housing affordability.

2.5.2 Larger dwellings

Australia is often said to have the largest new houses in the world. Larger homes are typically less sustainable from an environmental perspective as they tend to use more energy and they also consume more land, contributing to urban sprawl. In a

general sense, larger dwellings are less affordable, hence contributing to any housing affordability issues that may exist. The construction of larger homes also appears to go against the grain of demographic trends which are resulting in lower average household size.

ABS Building Activity data on average floor size of new dwellings in Victoria is shown in Figure 37 below. Over the period 2003-04 to 2012-13, the average floor area of new houses in Victoria increased by 13.7m² to 243.0m² in 2012-13. During this period, new houses reached a peak average floor area of 252.5m² in 2008-09, before moderating in subsequent years.

Average floor area for new other residential dwellings, which includes apartments and units, increased significantly from 135.8m² in 2003-04 to 158.5m² in 2012-13, before declining sharply since that time.

Figure 37. Average floor area of new residential dwellings, Victoria – 2003-04 – 2012-13

Year	New houses (m ²)	New other residential dwellings (m ²)
2003-04	229.3	135.8
2004-05	238.5	139.6
2005-06	241.9	141.2
2006-07	237.6	134.8
2007-08	240.9	145.6
2008-09	252.5	138.7
2009-10	238.6	158.5
2010-11	247.1	128.5
2011-12	247.8	127.9
2012-13	243.0	132.6

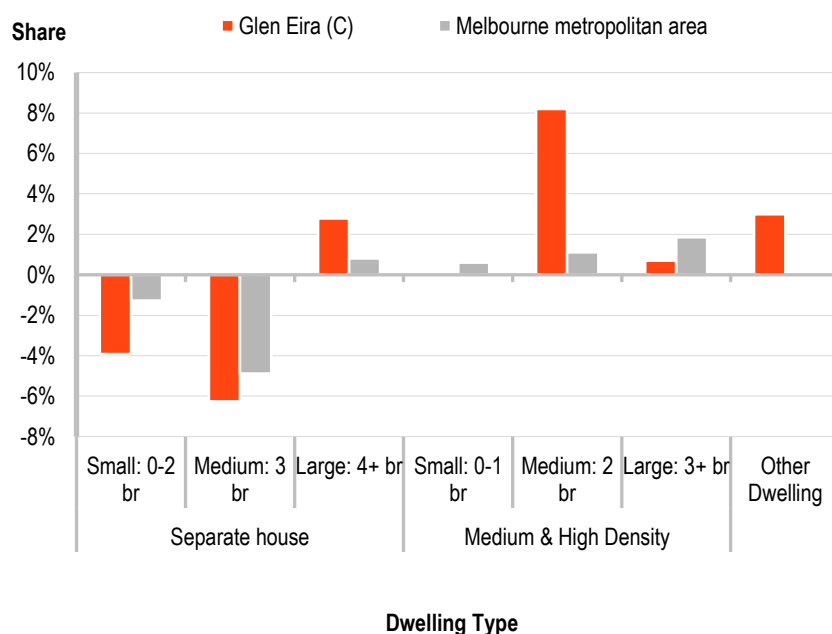
Source: ABS, Building Activity (Cat.no. 8752.0)

At the metropolitan level, the trend towards larger dwellings away from smaller ones is further supported by comparing recent changes in dwelling type by the number of bedrooms (Figure 38) in Glen Eira and metropolitan Melbourne. While three bedroom separate houses are the most common dwelling type in metropolitan Melbourne, the proportion of the total dwelling stock in metropolitan Melbourne declined from 38.2% in 2006 to 31.5% in 2016.

This decline in the overall proportion of three bedroom houses was primarily due to a relative strong growth in separate houses with four or more bedrooms, and medium and high density dwellings. While some of these new larger dwellings are located on the urban fringe, in Glen Eira – which also saw significant growth in these dwelling types – they are more likely the result of renovation of existing housing stock, or the replacement of older dwellings on larger blocks with units. Glen Eira recorded strong growth in the proportion of three bedroom medium and high density dwellings to total dwellings, but the change in the proportion of medium and high density dwellings with 0-2 dwellings was negligible.

Other ABS data also confirms the trend towards more bedrooms in dwellings. According to the Survey of Housing Occupancy and Costs (Cat. No. 4130.0), the average number of bedrooms per dwelling in Victoria was 2.9 in 1994-95. This increased to 3.0 in 2000-01 and 3.1 in 2013-14.

Figure 38. Change in dwelling type by number of bedrooms, City of Glen Eira and metropolitan Melbourne – 2006-2016



Source: ABS, Census of Population and Housing (2006 and 2016)

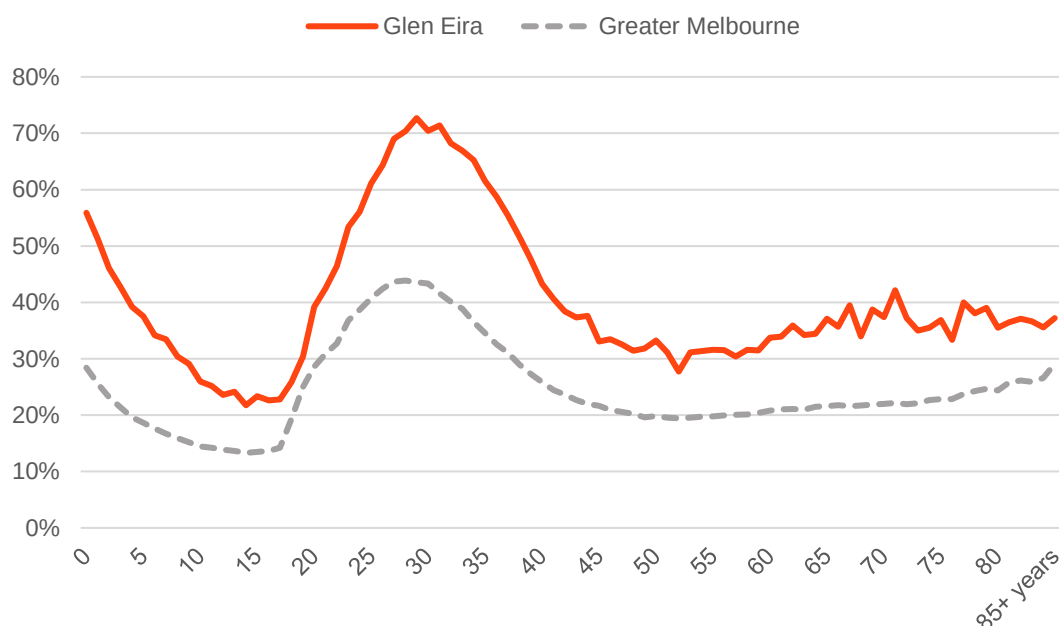
2.5.3 Increasing density

We have already seen that the majority of the housing stock in Glen Eira consists of low density separate houses. This housing pattern has developed incrementally over time as the Melbourne urban area expanded outwards. However, there is no further scope for further greenfield development simply due to the exhaustion of supply. As a result, future dwelling growth can only come through higher densities on infill sites, or major brownfield sites where they become available.

Many urban planning policies are generally predicated on the belief that the promotion of compact city models with medium and high density housing is suitable for emerging small households. This belief fails to consider the wider and complex environment in which housing decisions are made, and the reality is that small households do not automatically occupy dwellings with fewer bedrooms. A range of variables come into play when considering housing options, ranging from personal preferences to financial constraints. Furthermore, housing life cycles also need to be considered, as an elderly widow will have a different range of needs and constraints when compared with young persons or middle aged divorced persons.

In 2016, almost half of all people in Glen Eira lived in medium and high density dwellings (49.9%) compared with (32.4%) for the Greater Melbourne. At all age groups, a higher proportion of Glen Eira residents lived in medium and high density dwellings but the likelihood varies considerably by age (Figure 39). There is a strong peak for young adults in their twenties, with more than two-thirds of 27-30 year olds living in medium and high density dwellings. From around the age of 35 there is a decline, perhaps coinciding with family formation or an increase in family size. However from around the age of 50, the likelihood of living in higher density housing increases gradually. This pattern is consistent for both Glen Eira and the Melbourne Statistical Division and may relate to downsizing and other household changes.

Figure 39. Share of population in medium and high density dwellings by age, City of Glen Eira and Greater Melbourne – 2016



Source: ABS, Census of Population and Housing (2016)

Higher density housing has gradually become more common in Glen Eira in recent years, but it does represent a departure from the historical pattern of development. However, it is clear that demographic trends, such as an ageing population and declining average household size, augur well for a move in this direction. While Census data tells us much about the characteristics of people living in particular dwelling types, it does not tell us why. Figure 39 clearly shows that twentysomethings, and the elderly, are more likely to live in higher density housing. Qualitative studies on housing needs are rare, but it is obvious that there are different drivers behind the housing needs of these cohorts. For example, high rise apartments are not always suitable for frail aged, as they may have difficulty negotiating stairs and elevators. However, they are suitable for younger households trying to gain a foothold in the housing market through the purchase of a smaller dwelling, perhaps precipitating a later move to a larger dwelling when they reach a different stage in the housing life cycle.

2.5.4 Declining average household size?

This analysis has confirmed that three bedroom separate houses are the main dwelling type in Glen Eira, comprising around 27% of the dwelling stock. These types of dwellings service family housing markets well, but they also house non-family households in increasing numbers. Demographic trends such as population

ageing, family breakdown and relatively low fertility have resulted in declining average household size. Declining average household size increases the demand for dwellings, such that even where populations are stable or declining, the number of dwellings can still increase.

As shown in Figure 16 (section 2.2.6), average household size was 2.49 persons per household in 2011, and is forecast to decline moderately over the period to 2.42 persons in 2036. The evidence shows that small households do not automatically live in smaller dwellings. While some population groups may purposefully seek small dwellings eg students, many other small household types have other factors which need consideration when it comes to their housing needs. These include rising affluence (can afford more space) and family requirements (need more space). In addition, the supply of different housing types is a critical determinant of the type of housing people can live in. In some parts of Glen Eira, such as East Bentleigh, there is a predominance of separate houses. On the other hand, Caulfield, Carnegie and Elsternwick consists increasingly of high density apartments. As mentioned above, there is a lack of qualitative studies on housing needs, but clearly more evidence on the factors influencing the housing decisions of small households is required.

While this section has focussed on the evidence based by examining trends in housing and population, attention will now shift to the supply side of the equation by examining potential dwelling capacity in the City of Glen Eira.

3. Residential supply

3.1 Where is residential development occurring?

Contemporary urban planning policies in Australia seek to locate residential development into the most suitable places. Allocating specific areas (activity centres, specific redevelopment sites and other appropriate locations) for development protects valued existing residential areas and provides greater certainty and identified opportunities for developers. This section considers housing opportunities from a supply side perspective.

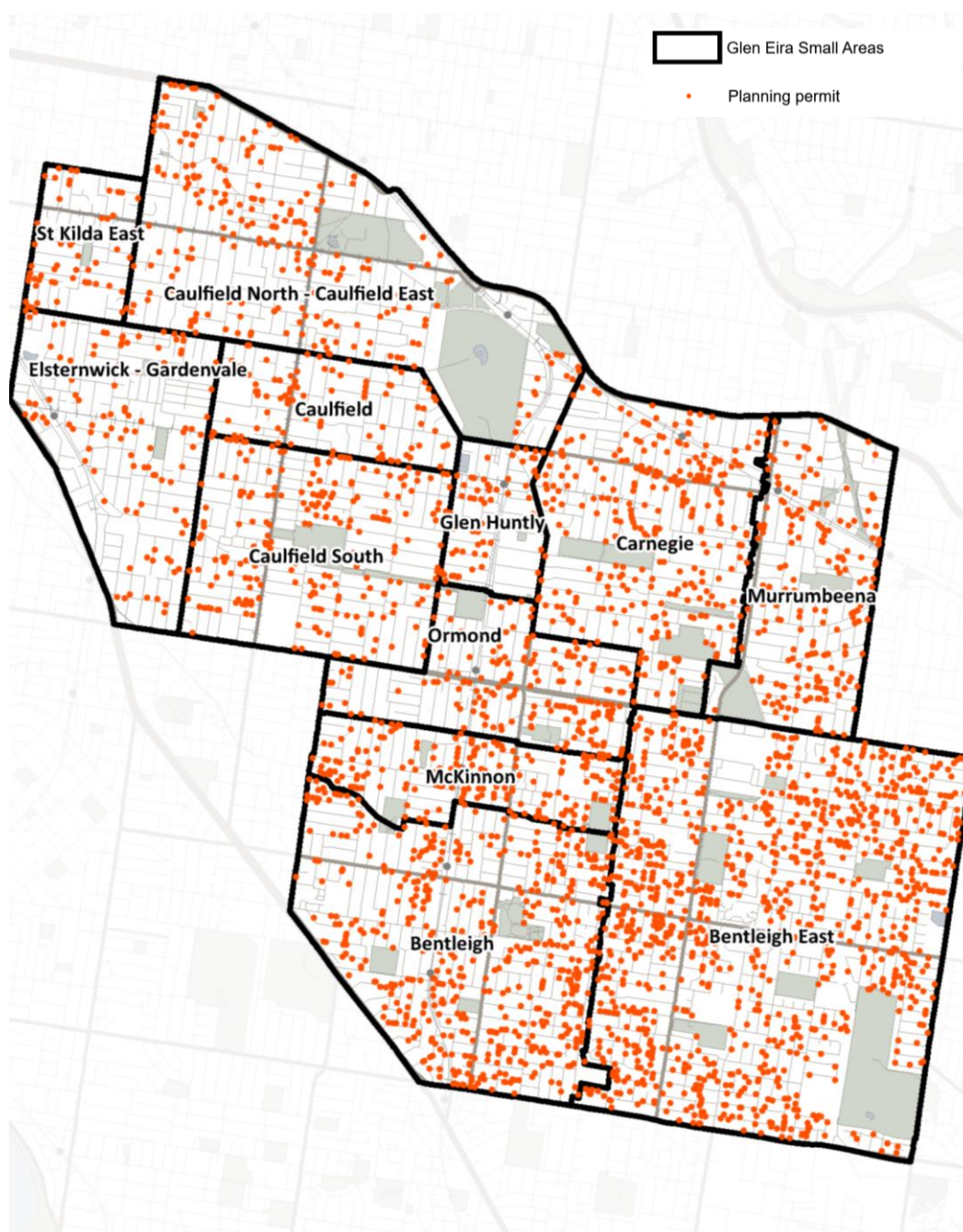
Figure 40 and 41 (following pages) shows the spatial distribution of planning permit approvals in the City of Glen Eira between 2006 and 2016. These maps show that when looking at dwelling yield by approval (Figure 41), that much larger concentrations of higher density developments are occurring in activity centres, transport corridors and close to transport nodes. This particularly evident in the major activity centres including Elsternwick, Caulfield Junction, Carnegie, and Bentleigh.

Additionally, a significant number of medium sized developments (generally 10-40 dwellings per development) were approved along the transport corridors as well as the majority activity centres. This reflects the outcomes of successive metropolitan planning strategies which have emphasised the need to encourage redevelopment around public transport nodes, particularly train stations, and around activity centres.

Notably, the last three years (2014-2016) has seen a notable increase in approvals compared with the 2006-2013 period. This is also reflected in Figure 43 which shows the ABS building approvals data by quarter over the same period. Though not all approvals result in a completed dwelling, it is still representative of the location of demand for building activity.

The spatial distribution of residential approvals shows some alignment with the Study Areas. This primarily reflects the incremental nature by which land available for new housing becomes available in an established urban area, and the demand for new housing across the City. However, current residential zones also permit certain types of development and subdivision on existing blocks.

Figure 40. Location of planning permit approvals, City of Glen Eira – 2006-2016



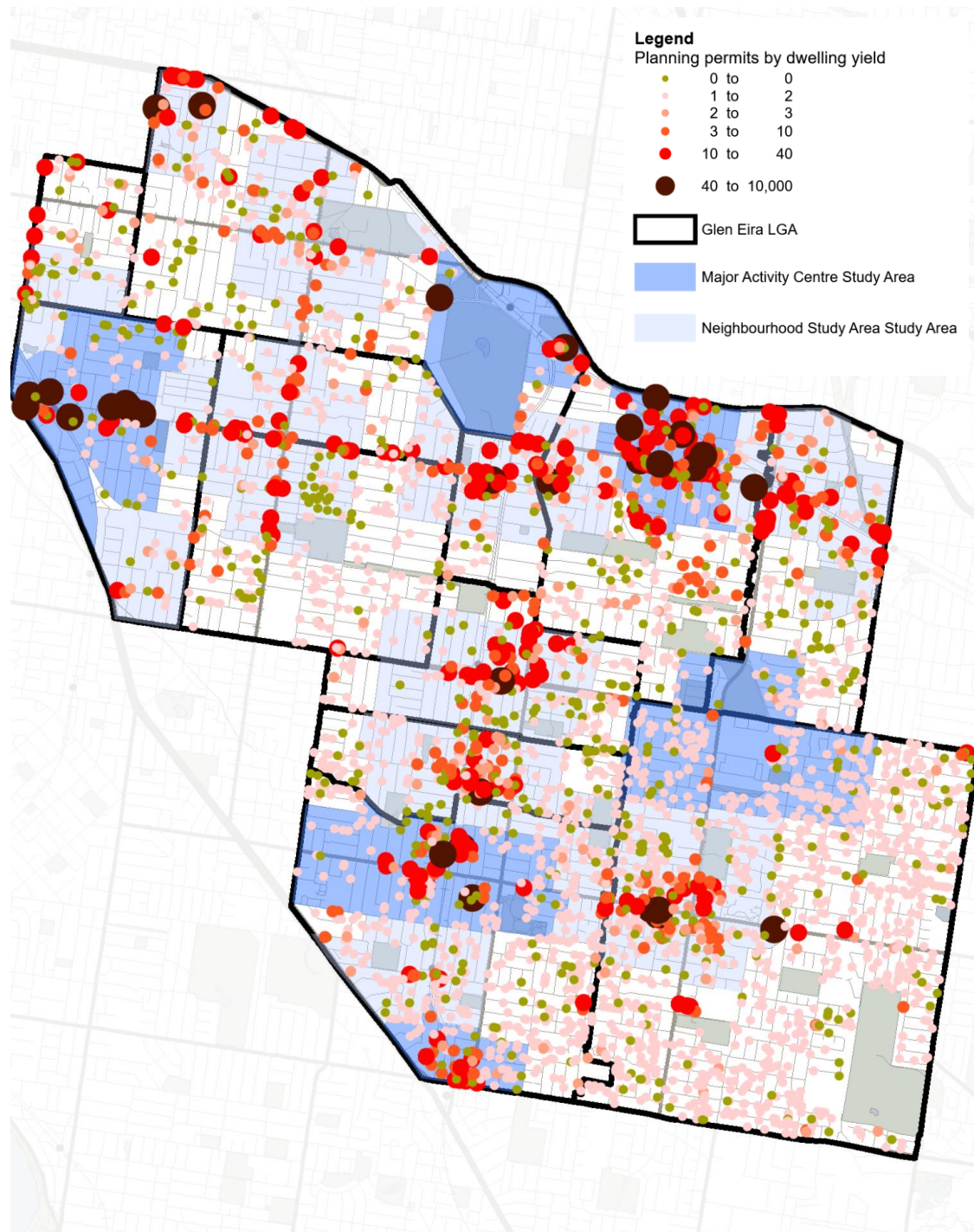
Source: City of Glen Eira (2006-2016) and .id (2017)

Figure 42, shows the total dwelling yield of planning permits by location between 2006 and 2016. Over this period, dwelling yield totalled almost than 9,700 dwellings, of which over 80% were in Study Areas. The Carnegie Study Area accounted for over 13% of dwelling additions across the City between 2006 and 2016, and a further 2% in the out-of-centre portion of the suburb. East Bentleigh also accounted for a large share of total dwelling additions with 8.5% of total dwellings constructed in the Study Area and a further 7.3% in the wider small area. This is not surprising given

the physical size of the suburb, coupled with the demand for new housing (primarily consisting of knock-down-replace and dual occupancies) over the last ten years.

Over the same period, the Glen Huntly and Bentleigh Study Areas comprised 7.6% and 7.1% of total dwelling additions, while the Study Areas of Caulfield South, Ormond, Murrumbeena, McKinnon each comprised around 5%.

Figure 41. *Location of planning permit approvals, City of Glen Eira – 2006-2016*



Source: City of Glen Eira (2006-2016) and .id (2017)

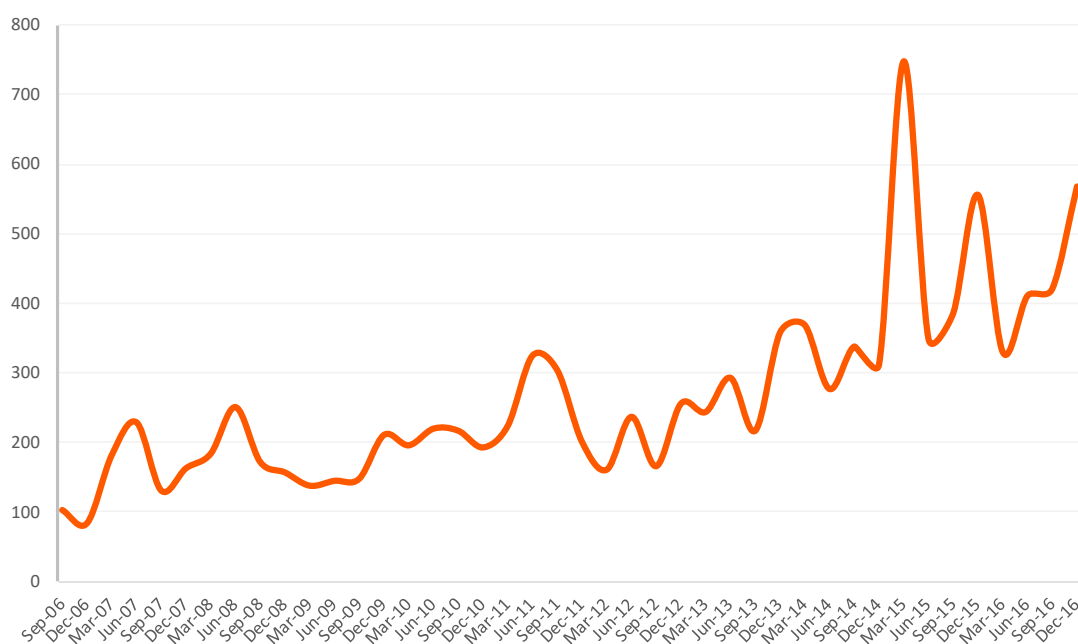
Between 2006 and 2016, the proportion of residential approvals in Study Areas increased from 72.9% in 2006-09 to 75.9% in 2010-2013, to 86.8% in 2014-16.

Figure 42. Dwelling yield by location – 2006-2016

	2006-2009	2010-2013	2014-2016	Total	Proportion
Study Area					
Alma Village	37	45	212	294	3.0%
Bentleigh	51	50	588	689	7.1%
Carnegie	111	302	907	1320	13.6%
Caulfield Junction	2	125	56	183	1.9%
Caulfield Park	60	113	102	275	2.8%
Caulfield South	111	205	174	490	5.1%
East Bentleigh	72	141	608	821	8.5%
East Village	51	56	108	215	2.2%
Elsternwick	237	46	519	802	8.3%
Gardenvale	3	6	26	35	0.4%
Glen Huntly	81	259	397	737	7.6%
Hughesdale	10	97	103	210	2.2%
McKinnon	45	87	321	453	4.7%
Moorabbin	25	45	143	213	2.2%
Murrumbeena	112	163	205	480	5.0%
Ormond	89	127	278	494	5.1%
Patterson	34	23	63	120	1.2%
Ripponlea	8	45	35	88	0.9%
Total in Study Areas	1139	1935	4845	7919	81.7%
Small Area					
Bentleigh	32	72	70	174	1.8%
Bentleigh East	160	264	288	712	7.3%
Carnegie	69	52	75	196	2.0%
Caulfield	6	24	15	45	0.5%
Caulfield North - Caulfield East	61	24	86	171	1.8%
Caulfield South	44	43	48	135	1.4%
Elsternwick - Gardenvale	3	1	0	4	0.0%
Glen Huntly	5	5	5	15	0.2%
McKinnon	9	11	20	40	0.4%
Murrumbeena	12	20	31	63	0.7%
Ormond	17	29	52	98	1.0%
St Kilda East	6	69	45	120	1.2%
Total out of centre	424	614	735	1773	18.3%
Total dwelling yeild	1563	2549	5580	9692	100.0%

Source: City of Glen Eira (2006-2017)

Figure 43 shows the building approvals data for the City of Glen Eira as published by the ABS. It confirms that over time the number of building approvals has generally increased each year but since 2013-14 there has been a marked increase. In 2014-15 the number of approvals reached 1,743 before moderating slightly to 1,679 in 2015-16. These numbers are almost double the number of approvals recorded in 2011-12 (899).

Figure 43. Building approvals by quarter, City of Glen Eira – 2006-16

Source: ABS, Building approvals (Cat. No. 8731.0)

3.2 Opportunity for future residential development

This section will explore the opportunity for future residential development by looking at three key sources of supply – Activity Centres/Study Areas, infill (out of centre development) and strategic development sites (forecast.id). An assessment of housing opportunity in potential urban renewal areas (Virginia Park and C2Z zones on the Nepean Highway) is also included. Each of these is considered in turn with a view to quantifying future residential opportunities.

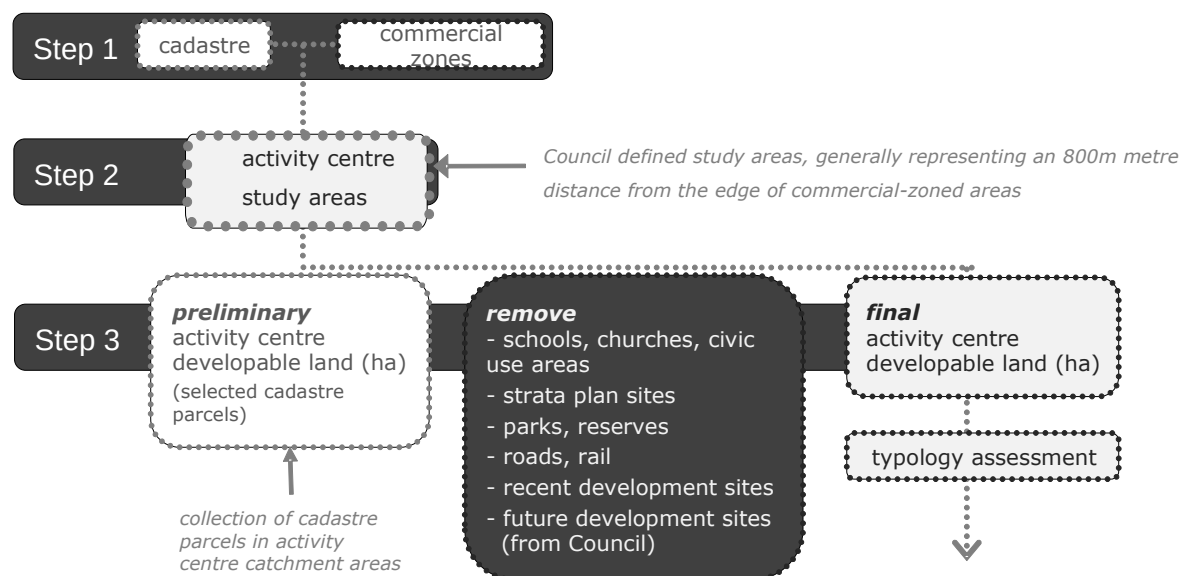
3.2.1 Opportunity for development in Activity Centres

This section will explore the opportunities to promote residential development in locations and patterns most suited to emerging household needs. Many factors influence the dynamics of dwelling supply and demand. These are manifested in land value, which drives dwelling development densities, dwelling formats and marketing approaches, to effectively create housing markets. For example, the so-called inner city apartment boom is largely a supply driven phenomenon that has satisfied latent demand.

Methodology

Our method for assessing development opportunities in Activity Centres considers local constraints in a regional context to provide a quantified supply scenario (Figure 44). This is a starting point for a residential development strategy that responds to State Government urban policy and meets the changing needs of the City's residents. This 'first-cut' of development opportunities categorises each centre to identify opportunities and constraints, then applies development densities based on land, zoning and dwelling assumptions. There are eighteen Activity Centres considered as part of this report, a map of which is contained in Appendix 6.2.

Figure 44. Identifying dwelling opportunities in Activity Centres - methodology



The process is described below –

Step 1: Identify commercially-zoned areas & establish Activity Centres boundaries

Activity Centres and their catchments were identified by Council. There are 18 in total, 6 of which are Major Activity Centres. Notably, the Activity Centres are quite large in size, often extending beyond a walkable catchment of 800 metres.

Step 2: Calculate the amount of developable land

In each catchment area, any parcels of land that are not considered available for development are removed from analysis. This includes open space, reserves and

parkland, schools, churches, civic buildings, strata plan sites, roads, rail, and parcels less than 400 square metres. Recent dwelling approvals, NRZ parcels and major sites are also excluded. This process determines the total hectares available for development, ie the amount of developable land. NRZ parcels are treated separately for the purposes of this exercise due to the prescriptive nature of the zone.

Step 3: Activity Centres typology assessment

Not all available land in each centre will be developed. The proportion of land to be developed depends on the attractiveness of the centre and resulting land values.

Each centre is assessed to determine its development potential based on the following six attributes:

i. Access to public transport

This indicates the importance and value of the centre as a destination as well as the level of accessibility to people who don't have a car. The more important a centre, the higher the demand for floor space (residential and commercial), the higher the land value and the better the public transport. In general, higher land values make higher density development more viable. The type, frequency and destination of public transport was considered.

ii. Level of services and retailing

This is indicative of the function of a centre. The higher the level of services and retail in a centre then the higher the demand for space in and access to that centre. This tends to increase the potential for higher density development. Centres with core services such as banks, post office, newsagency and food retailing were given a higher score than those without.

iii. Access to health and education facilities

Tertiary education institutions and health facilities are major destinations for employment and visitation, and as a consequence generate higher commercial and residential demand. They also attract particularly housing markets, such as students and workers. This also increases transport demand, making public transport more viable.

iv. Urban integration

This is an assessment of the extent to which a centre is integrated into the surrounding residential areas, particularly its walkability. In general, streets laid out in a grid pattern have a higher level of walkability due to their permeability. Areas with numerous cul-de-sacs and crescents with few arterial through roads are less walkable and tend to increase car travel and congestion. Urban integration may also

be influenced by the layout of surrounding car parks and whether any main roads have safe crossing points.

v. Proximity to the CBD

This considers the proximity of an Activity Centre to the CBD. It recognises that parts of the City have better access to the CBD and this is important for people accessing employment, education and lifestyle opportunities.

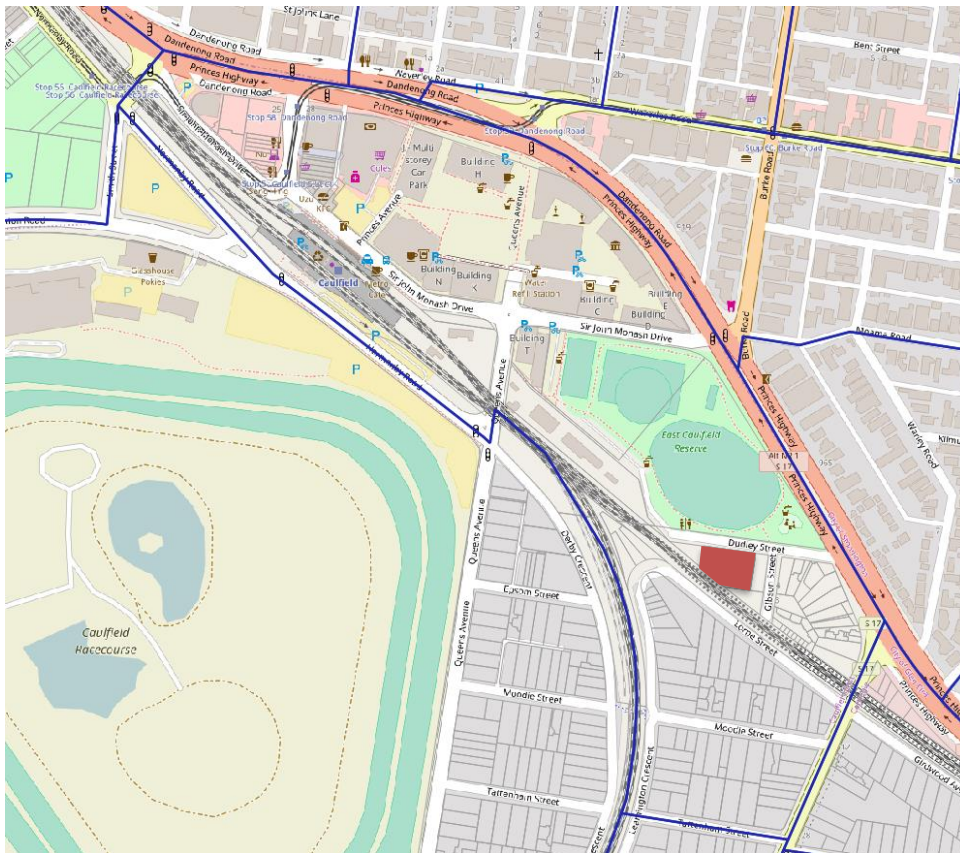
Step 4: Apply dwelling density assumptions

A mix of densities (50, 75, 100, 150, 200, 250 and 300 dwellings per hectare gross) is applied to the resulting land area. Adjustments account for existing stock and some demolition activity. In general, higher scores tend to result in higher densities due to the higher desirability of the centre.

Dwelling density assumptions are derived from examining relevant examples of desirable locations and urban forms, such as areas with high amenity, access to services and open space. Streetscape and aerial photos of recent developments around the City are illustrated on the following pages to show how densities could appear in existing urban settings (Figures 45-51). The densities have been calculated on the basis of the Statistical Area 1 level (SA1) and number of dwellings.

Note that these examples are merely illustrative and the purpose is to demonstrate the different scale and development, rather than refer to specific examples of housing development in the City of Glen Eira itself.

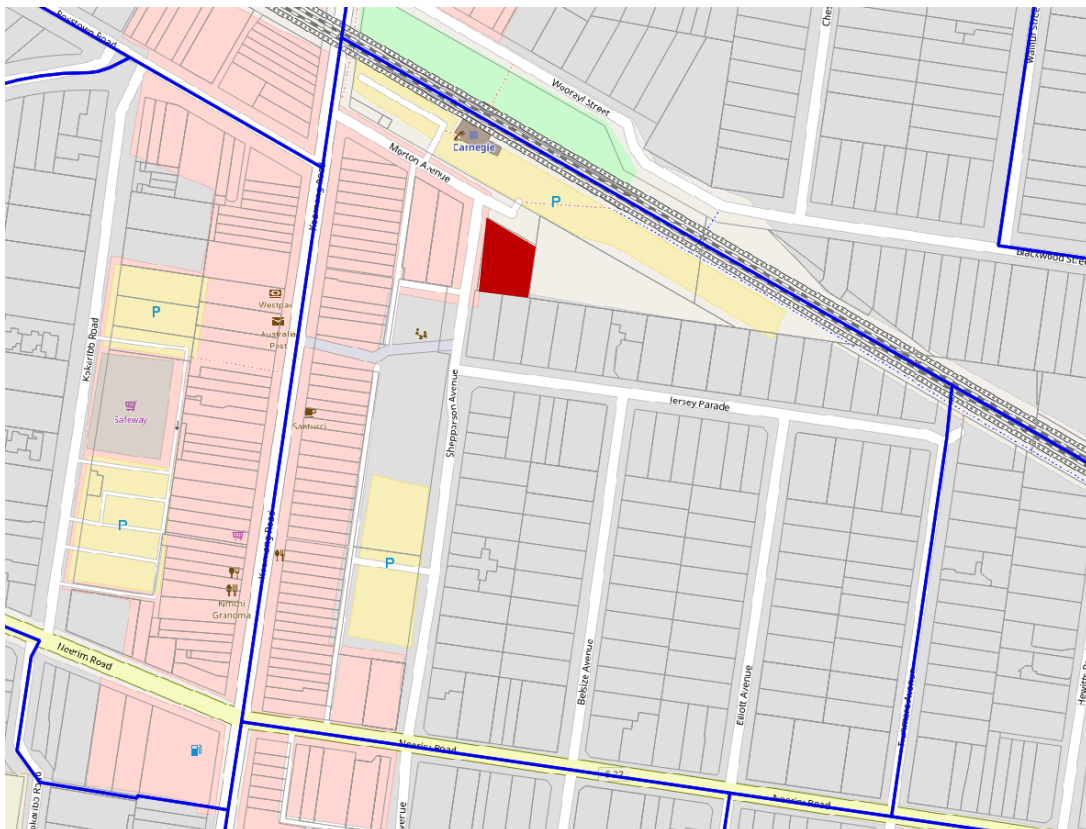
Figure 45. Very high density (300 dwellings per hectare) – Dudley Street, Caulfield



Density of site – 302 dwellings per hectare

Density of SA1 – 6 dwellings per hectare

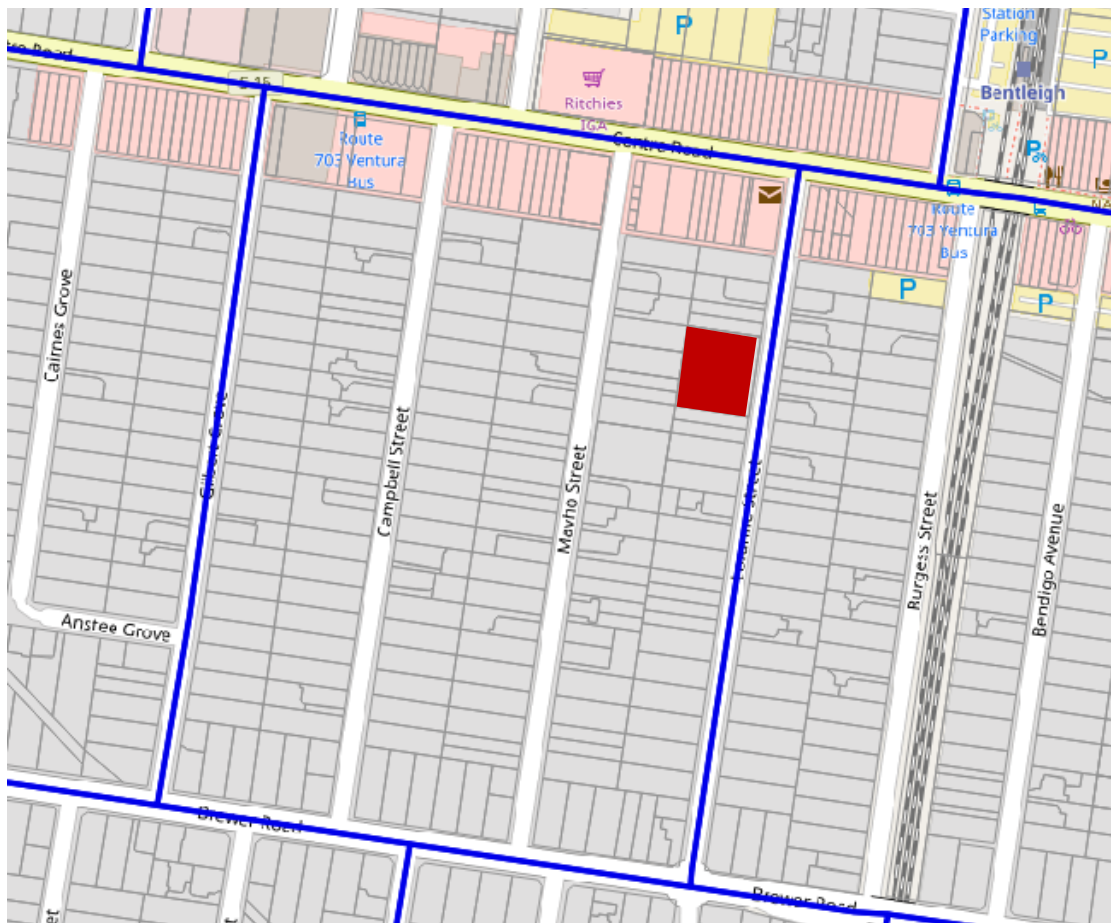
Figure 46. Higher density (250 dwellings per hectare) – Morton Avenue, Carnegie



Density of site – 275 dwellings per hectare

Density of SA1 – 21 dwellings per hectare

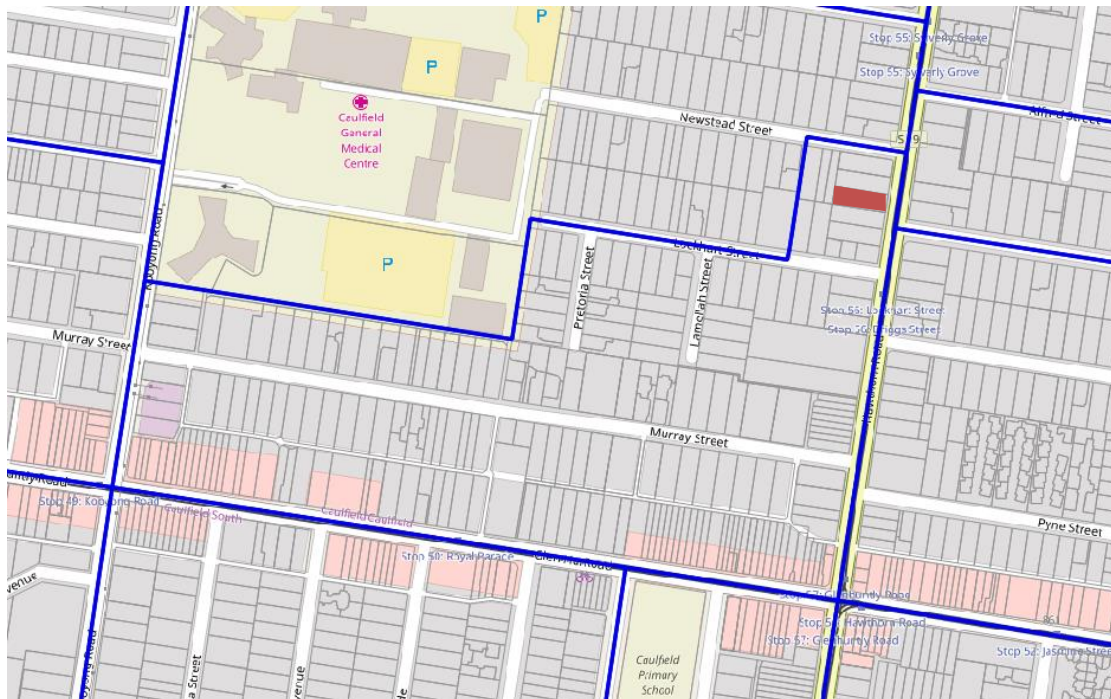
Figure 47. High density (200 dwellings per hectare) – Loranne Street, Bentleigh



Density of site – 203 dwellings per hectare

Density of SA1 – 15 dwellings per hectare

Figure 48. High density (150 dwellings per hectare) – Hawthorn Road, Caulfield



Density of site – 143 dwellings per hectare

Density of SA1 – 17 dwellings per hectare

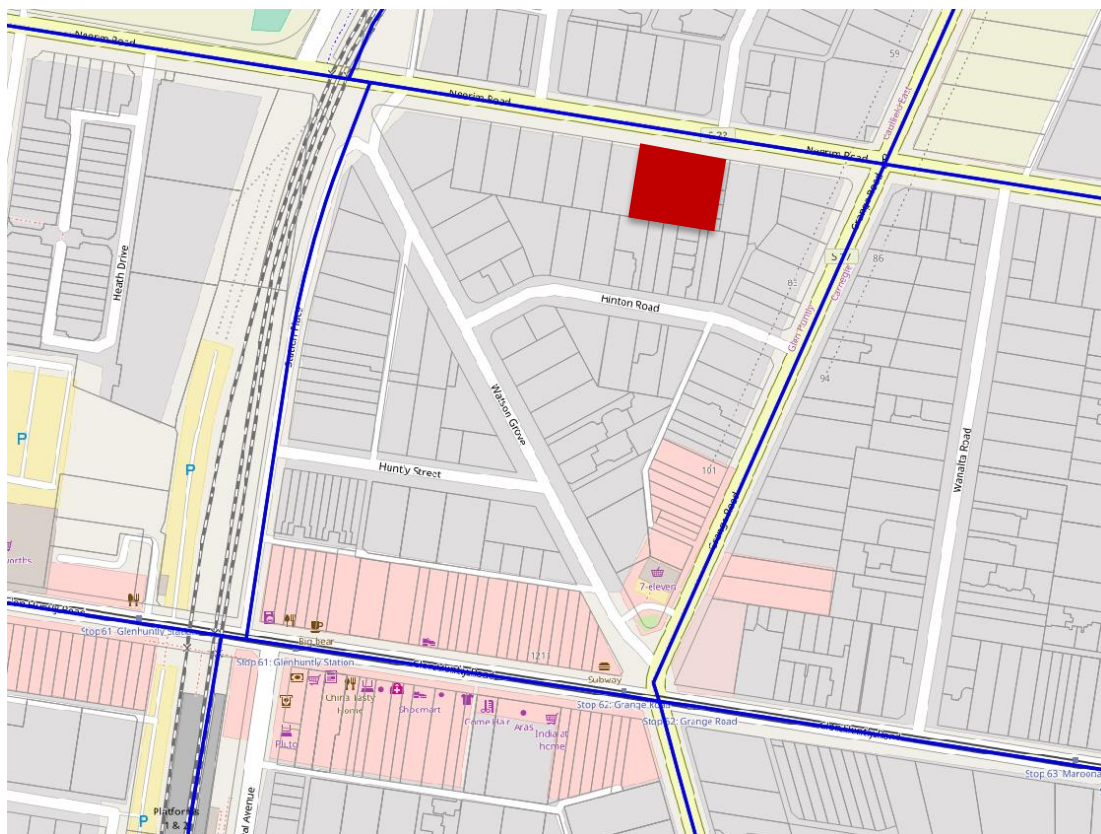
Figure 49. Medium/high density (100 dwellings per hectare) – Booran Road, Caulfield South



Density of site – 102 dwellings per hectare

Density of SA1 – 11 dwellings per hectare

Figure 50. Medium density (75 dwellings per hectare) – Neerim Road, Glen Huntly



Density of site – 76 dwellings per hectare

Density of SA1 – 18 dwellings per hectare

Figure 51. Medium density (50 dwellings per hectare) – Lilimur Road, Ormond



Density of site – 50 dwellings per hectare

Density of SA1 – 23 dwellings per hectare

Results

Figure 52 presents the results of the activity centres analysis. The scores are calculated on the current characteristics of each centre and do not consider potential changes in land use or transport infrastructure. However, this provides a starting point from which Council can assess where to direct resources and services.

There were three centres that scored 4.5 when measured against the five attributes. These were Carnegie, Caulfield Junction and Elsternwick. All of these are Major Activity Centres and they all have good access to public transport (rail and tram), a high level of retail and services (all have traditional shopping strips and supermarkets) and they all have good proximity and access to the CBD. Several centres scored 3.5 including the Major Activity Centres of Bentleigh and Moorabbin, along with the Neighbourhood Activity Centres of Caulfield South, Gardenvale, Glen Huntly, Murrumbeena and Ripponlea.

At the other end of the scale, East Village recorded the lowest score, receiving just one point out of five. This centre does not have railway or tram services, and has minimal retail and other services along its commercial spine. It is also split by two major arterial roads that impacts on urban integration. East Bentleigh also received a relatively low score of just two points. It was notable that lack of public transport access was the major reason why these centres scored poorly when measured against the attributes.

Despite this, as an established part of Melbourne's south east, most centres did score well on public transport primarily due to the good rail networks (Frankston, Dandenong and Sandringham lines) and the tram network in suburbs closer to the CBD. Interestingly, not all scored well on urban integration (as mentioned above this was primarily due to major arterial roads) nor on the level of services and retail. Some Activity Centres have traditional shopping strips, coupled with supermarkets, restaurants and other services that attract visitation from other parts of the City and metropolitan area. These tended to be the major differentiating factors influencing the scoring of Activity Centres.

Figure 52. Activity Centre analysis – assumptions and scores

Activity Centre	Analysis
Carnegie Major Activity Centre Score: 4.5 Public transport access: 1 Significant services/retail component: 1 Major health/education facility: 0.5 Urban integration: 1 Proximity to CBD: 1	Located in the north of the City, about 13km from the CBD, the Carnegie Activity Centre is predominantly a commercial (retail) and a residential area. Defined as a Major Activity Centre, Carnegie contains a number of supermarkets (including two full-line supermarkets) as well as a range of speciality shops including cafes and restaurants and other commercial/office premises. The Centre also contains both strip shopping as well as Carnegie Central, an enclosed shopping centre. The Carnegie Train Station is in the north of the of the centre and is currently being rebuilt and reopened in August 2016 as part of the State government's Level Crossing Removal Program. Once completed the grade separation will greatly improve permeability between the north and south of the centre. Additionally, due to its proximity to public transport and Monash University Caulfield Campus, Carnegie is playing an increasing role in providing accommodation for university students. Several apartment buildings have been constructed in the Centre in recent years, typically containing between 20 and 45 dwellings. Based on our typology assessment, the Carnegie Activity Centre is very well placed for continued intensive forms of development, scoring 4.5 points. Assumed 36% of developable land in the centre for future residential development of <u>at least</u> 200 dwellings per hectare.
Caulfield Junction Major Activity Centre Score: 4.5 Public transport access: 1 Significant services/retail component: 1 Major health/education facility: 1 Urban integration: 0.5 Proximity to CBD: 1	Caulfield Junction is located around 11km from the CBD and contains a range of land uses including: • Monash University Caulfield Campus • Caulfield Race Course (MRC) • Caulfield Village • Retail (full-line supermarket) • Recreation (Sporting Ovals/Tennis Courts) • Caulfield Train Station (Grade Separation) Caulfield train station is notable as it forms the junction of the Pakenham and Frankston lines, hence there are a significant number of services compared to stations further down each line. The station also caters for V-line services on the Gippsland line. The Centre is also served by tram and bus routes.

Activity Centre**Analysis**

As the location of the Caulfield Campus of Monash University, as well as the Caulfield Race Course, the Centre experiences a high level of visitation from other parts of Melbourne.

Based on our typology assessment, the Caulfield Junction Activity Centre is very well placed for continued high levels of development. Strategic development sites such as Caulfield Village and future student accommodation at Monash University will form a significant part of future residential supply. In addition, it is assumed that 36% of developable land in the centre for future residential development of at least 200 dwellings per hectare.

Elsternwick*Major Activity Centre***Score: 4.5**

Public transport access: 1

Significant services/retail component: 1

Major health/education facility: 0.5

Urban integration: 1

Proximity to CBD: 1

Elsternwick Activity Centre is located on the western edge of the City and is around 9km from the CBD. It contains a traditional strip shopping centre along Glen Huntly Road along with a private hospital (Cabrini Health) and full line supermarket (Coles). In more recent years there have been apartment buildings constructed particularly near the train station. The Centre has a high level of visitation as the Classic Cinema is located here, along with several restaurants and cafes. Elsternwick train station is located on the Sandringham line and the centre is also served by tram and bus routes.

Based on our typology assessment, the Elsternwick Activity Centres is very well placed for continued high levels of residential development. Assumed 36% of developable land in the centre for future residential development of at least 150 dwellings per hectare.

Bentleigh*Major Activity Centre***Score: 3.5**

Public transport access: 1

Significant services/retail component: 1

Major health/education facility: 0

Urban integration: 1

Proximity to CBD: 0.5

Located approximately 16 km from the CBD, the Bentleigh Activity Centre extends along the Centre Road spine from Leckie Street in the east to Thomas Street in the west. As a higher order centre, there are a wide range of land uses, including strip shopping centres, a discount department store, a number of supermarkets (including two full-line supermarkets) as well as a range of speciality shops including cafes and restaurants and other commercial/office space. There are also education, civic and recreation uses including a primary school, child care, library, as well as the Bentleigh Reserve and Hodgson Reserve.

Activity Centre	Analysis
	The Bentleigh Train Station is situated in the centre of the Activity Centre which was rebuilt and reopened in August 2016 as part of the State government's Level Crossing Removal Program. As a result walkability and permeability has greatly improved throughout the centre. In recent years, while small scale shop top developments are occurring, more intensive residential developments are becoming more common through site consolidation areas up-zoned to accommodate more higher density residential development. Based on our typology assessment, the Bentleigh Activity Centre is very well placed for more intensive forms of development, scoring 3.5 points against the attributes. Assumed 28% of developable land in the centre for future residential development of <u>at least</u> 150 dwellings per hectare.
Moorabbin <i>Major Activity Centre</i> Score: 3.5 Public transport access: 1 Significant services/retail component: 1 Major health/education facility: 0.5 Urban integration: 0.5 Proximity to CBD: 0.5	The Moorabbin Activity Centre is located in the south of the City around 17km from the CBD. It abuts the Nepean Highway and South Road, both important arterial roads in the southern suburbs of Melbourne. The Centre is bisected by the Frankston train line and the Moorabbin Train Station is located on the opposite side of South Road in neighbouring Kingston City Council. There is a wide range of retail outlets and commercial/office premises in the suburb of Moorabbin however most of them are located on the southern side of South Road ie not in the City of Glen Eira. There are several car retail premises on the Nepean Highway and other retail/commercial space on the northern side of South Road, including some small shop top housing developments. The attractiveness of the Moorabbin Activity Centre is influenced by the location of high order retail and other public transport just outside the City of Glen Eira. Based on our typology assessment the Centre is well placed for more intensive residential development than in the past. Assumed 28% of developable land in and around the centre for future residential development of <u>at least</u> 150 dwellings per hectare.
Murrumbeena <i>Neighbourhood Centre</i> Score: 3.5 Public transport access: 1 Significant services/retail component: 0.5 Major health/education facility: 0.5 Urban integration: 0.5 Proximity to CBD: 1	Murrumbeena Neighbourhood Centre is located in the north east of the City and is around 15km from the CBD. There are a range of retail and commercial premises, particularly along Murrumbeena and Neerim Roads. The Centre is served by the Dandenong train line and a number of bus routes.

Activity Centre	Analysis
	Murrumbeena Station is currently undergoing a grade separation process which will improve connectivity and traffic flow in the Centre. Recent residential development in the Centre has consisted of smaller apartment blocks, typically containing up to 30 dwellings, as well as incremental infill. Murrumbeena Neighbourhood Centre scored 3.5 against the five attributes and is well placed for more intensive forms of residential development in the future. Assumed 28% of developable land in and around the centre for future residential development of at least 150 dwellings per hectare.
Caulfield South <i>Neighbourhood Centre</i> Score: 3.5 Public transport access: 0.5 Significant services/retail component: 0.5 Major health/education facility: 0.5 Urban integration: 0.5 Proximity to CBD: 0.5	The Caulfield South Neighbourhood Centre is one of the largest in the City and covers part of three suburbs (Caulfield, Caulfield South and Elsternwick). It is located around 11-13km from the CBD. Caulfield South lacks a train station but is served by tram and bus services. The Caulfield Hospital is located in the Centre and there is a traditional strip shopping strip along Glen Huntly Road. In addition to infill development, recent residential developments have consisted of apartment buildings generally between 10 to 40 dwellings. Based on our typology assessment, Caulfield South is well placed for more intensive forms of residential development. Assumed 28% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
Glen Huntly <i>Neighbourhood Centre</i> Score: 3.5 Public transport access: 1 Significant services/retail component: 1 Major health/education facility: 0 Urban integration: 0.5 Proximity to CBD: 1	Glen Huntly Neighbourhood Centre is another large centre, covering most of the suburb as well as parts of Carnegie, Caulfield, Caulfield South and Caulfield North – Caulfield East. The Centre is bisected by the Frankston train line and there is a train station, as well as tram and bus services. There is a small traditional shopping strip primarily along Glen Huntly Road, including a major supermarket, speciality stores and commercial/office space. Glen Huntly has a history of more intensive residential development with a number of apartment buildings (walk ups) dating back to the 1970s, particularly in the area between the train station and Grange Road. In more recent years a number of residential apartment buildings, generally comprising between

Activity Centre	Analysis
	10 and 30 dwellings, have been constructed. Based on our typology assessment, Glen Huntly Neighbourhood Centre is well placed for more intensive forms of residential development. Assumed 28% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
Caulfield Park <i>Neighbourhood Centre</i> Score: 3.5 Public transport access: 0.5 Significant services/retail component: 0.5 Major health/education facility: 0.5 Urban integration: 1 Proximity to CBD: 1	Caulfield Park Neighbourhood Centre is located in the north of the City, around 11-13km from the CBD. It is focussed around a traditional strip shopping centre at the junction of Balaclava and Hawthorn Roads, which offers small scale retail and other services for the surrounding population. There is no train station in the Centre itself, the nearest one being Malvern Station in neighbouring Stonnington City Council. There is a tram service along Hawthorn Road in addition to bus routes. Caulfield Park is notable for the park of the same name, one of the largest public open spaces in the inner southern suburbs. In recent years there have been several new apartment buildings constructed in and around the centre. Many of these contain between 10 and 30 dwellings. Based on our typology assessment, Caulfield Park is well placed for more intensive forms of residential development in the future. Assumed 28% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
Hughesdale <i>Neighbourhood Centre</i> Score: 3.0 Public transport access: 1 Significant services/retail component: 0 Major health/education facility: 0 Urban integration: 1 Proximity to CBD: 1	Hughesdale Neighbourhood Centre is located on the eastern edge of the City and is focussed on Poath Road. It is around 14km from the CBD. The Hughesdale train station is located on the eastern side of Poath Road in neighbouring Monash City Council but is easily accessed from the rest of the centre. This access will be enhanced after the grade separation of this section of the Dandenong train line. There are a small number of shops along Poath Road but no major retail or commercial premises. Hughesdale has a history of medium density developments with many larger blocks redeveloped with villa units. More recently apartment buildings of between 10 and 40 dwellings have been constructed or proposed near the station. Based on our typology assessment, Hughesdale Neighbourhood Centre has good potential for more intensive forms of residential

Activity Centre	Analysis
	development. Assumed 24% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
McKinnon <i>Neighbourhood Centre</i> Score: 3.0 Public transport access: 1 Significant services/retail component: 0 Major health/education facility: 0.5 Urban integration: 1 Proximity to CBD: 0.5	McKinnon Neighbourhood Centre covers most of the suburb of the same name and is focussed around the train station and a shopping strip along McKinnon Road. The well regarded McKinnon Secondary College is located adjacent to the Centre and this encourages migration of families into the area. The recent grade separation of the Frankston line has improved walkability and traffic flow along McKinnon Road. In recent years several apartment buildings have been constructed in the vicinity of the station, replacing older houses on larger blocks, as well as shop top housing along McKinnon Road. Based on our typology assessment, McKinnon Neighbourhood Centre is well placed for more intensive forms of development in the future. Assumed 24% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
Ormond <i>Neighbourhood Centre</i> Score: 3.0 Public transport access: 1 Significant services/retail component: 0.5 Major health/education facility: 0 Urban integration: 1 Proximity to CBD: 0.5	Ormond Neighbourhood Centre is one of the larger centres in the City of Glen Eira and covers most of the suburb of the same name, as well as extending into a small part of Caulfield South. It is focussed around a shopping strip along North Road, one of Melbourne's major arterial roads. This contains one major supermarket along with other retail and commercial premises. In recent years there have been several apartment buildings constructed particularly along North and Grange Roads. Most of these have replaced older housing on larger blocks and typically comprise 12-25 dwellings. Based on our typology assessment, Ormond Neighbourhood Centre is well placed for more intensive forms of development in the future. Assumed 24% of developable land in and around the centre for future residential development of <u>at least</u> 100 dwellings per hectare.
Ripponlea <i>Neighbourhood Centre</i> Score: 2.5 Public transport access: 1 Significant services/retail component: 0 Major health/education facility: 0 Urban integration: 0.5 Proximity to CBD: 1	Ripponlea Neighbourhood Centre is a small centre located on the western edge of the City, abutting Hotham Street and straddling Glen Eira Road. The National Trust classified Rippon Lea Housing and Gardens is located in the Centre and encourages high levels of visitation.

Activity Centre	Analysis
	The Ripponlea train station is located in neighbouring Port Phillip City Council as is the traditional shopping strip along Glen Eira Road. There are only a handful of retail premises located in the Centre itself. In recent years most new multi-unit developments have been located along Hotham Street and typically contain between 10 and 30 dwellings. Based on our typology assessment, Ripponlea Neighbourhood Centre has some potential for more intensive forms of residential development. Assumed 20% of developable land in and around the centre for future residential development of at least 75 dwellings per hectare.
Gardenvale <i>Neighbourhood Centre</i> Score: 2.5 Public transport access: 0.5 Significant services/retail component: 0.5 Major health/education facility: 0 Urban integration: 0.5 Proximity to CBD: 1	The Gardenvale Neighbourhood Centre is located on the western side of the City and abuts the Nepean Highway and North Road, two of Melbourne's major arterial roads. It is around 11km from the CBD. There is no train station or tram service within the Centre but the Gardenvale Station is located nearby in the neighbouring Bayside Council. Gardenvale is served by a traditional but small strip shopping strip with a mix of retail and office space. There is also some "big box" retailing along the Nepean Highway. There have been few residential development projects in the Centre in recent years. Many of these consist of less than ten dwellings and are typically dual occupancies rather than apartment buildings. Based on our typology assessment, Gardenvale Neighbourhood Centre has some potential for more intensive forms of residential development, as it has good access to the CBD, as well as good public transport connections and retail services on the western side of the Nepean Highway. Assumed 20% of developable land in and around the centre for future residential development of at least 75 dwellings per hectare.
Alma Village <i>Neighbourhood Centre</i> Score: 2.5 Public transport access: 0.5 Significant services/retail component: 0 Major health/education facility: 0 Urban integration: 1 Proximity to CBD: 1	Alma Village Neighbourhood Centre is a small centre located in the north west corner of the City, abutting Dandenong Road and Orrong Road. Tram services run down Dandenong Road and there are bus routes servicing the centre. There are a small number of shops at the junction of Orrong and Alma Roads. More recent medium to high density developments are located along Dandenong Road, replacing older homes on larger lots. These tend to contain between 15 and 30 dwellings. Hotham

Activity Centre	Analysis
Patterson <i>Neighbourhood Centre</i> Score: 2.5 Public transport access: 1 Significant services/retail component: 0 Major health/education facility: 0 Urban integration: 1 Proximity to CBD: 0.5	Street and typically contain between 10 and 30 dwellings. Based on our typology assessment, Alma Village Neighbourhood Centre has some potential for more intensive forms of residential development. Assumed 20% of developable land in and around the centre for future residential development of at least 75 dwellings per hectare. Patterson Neighbourhood Centre is located in the south of the City and is focussed around the train station and a small group of shops along Patterson Road. The centre extends to the Nepean Highway along which there is a wide variety of big box retailing outlets, including several car dealerships. The centre has good walkability and compared to other centres has had relatively little medium or high density residential development. However there are many larger blocks that have been subdivided as dual occupancies and this has increased in number over the last few years. Based on our typology assessment, Patterson Neighbourhood Centre has some potential for more intensive forms of residential development. Assumed 20% of developable land in and around the centre for future residential development of at least 75 dwellings per hectare.
East Bentleigh <i>Neighbourhood Centre</i> Score: 2.0 Public transport access: 0 Significant services/retail component: 0.5 Major health/education facility: 0.5 Urban integration: 0.5 Proximity to CBD: 0.5	East Bentleigh Neighbourhood Centre is a larger centre focussed on the junction of Centre Road and East Boundary Road. Though there is a strip shopping centre along Centre Road, it lacks the major supermarkets of neighbouring Bentleigh Major Activity Centre. Much of the Centre is low density residential, typical post war suburban development of single dwellings on large lots. One of the more major developments in recent years has been the redevelopment of the Cyclone Industries site into housing, but more recent approvals have been for higher density apartment buildings generally containing around 15-30 dwellings each. East Bentleigh Neighbourhood Centre lacks a train station and from a public transport perspective is served by buses. This impacts the scoring against the five attributes as well as the potential for very high residential densities. Regardless, based on our typology assessment there is potential for more intensive forms of residential development, as there is existing retail and commercial space, good walkability and from a metropolitan perspective it has good access to the CBD as well as

Activity Centre	Analysis
	employment markets in Monash and Greater Dandenong City Councils. Assumed 16% of developable land in and around the centre for future residential development of at least 75 dwellings per hectare.
East Village <i>Major Activity Centre</i> Score: 1 Public transport access: 0 Significant services/retail component: 0 Major health/education facility: 0 Urban integration: 0.5 Proximity to CBD: 0.5	East Village Major Activity Centre is a larger centre in the eastern part of the City that is focussed around the junction of North Road and East Boundary Road. Despite its designation as a major activity centre, it did not score well against the five attributes. There is a lack of public transport and retail services, however it did receive scores for urban integration and proximity to the CBD. Most of the centre consists of low density residential dwellings and a large parcel of underutilised industrial land. In recent years there have been some dual occupancy developments but little in the way of higher densities. This, combined with the low score for the centre, indicates relatively low potential for more intensive forms of residential development in the future. Due to the small amount of land identified as developable, the number of additional dwellings (aside from one development site on Murrumbeena Road) are assumed to be zero.

The scores, developable land and the assumed development density are summarised in Figure 53. Developable land excludes significant landscape, open space areas and forecast development sites. The latter in particular impacts on the Centres such as Caulfield Junction where a significant portion of the centre is subject to a development plan with specified future dwelling targets. It also excludes NRZ parcels as these have planning controls that are more prescriptive, and are considered separately. Overall, around 25% of developable land in Activity Centres is assumed to be developed.

Figure 53. Activity Centre analysis – land and residential density development assumptions

Centre	Score	Developable Land (ha)	Land development assumption (%)	Development density - dwellings per hectare (dph)						
				300	250	200	150	100	75	50
Bentleigh	3.5	16.3	28%	20%	30%	40%	10%	0%	0%	0%
Carnegie	4.5	17.2	36%	30%	50%	20%	0%	0%	0%	0%
Caulfield Junction	4.5	1.9	36%	40%	40%	20%	0%	0%	0%	0%
East Village	1.0	0.6	8%	0%	0%	0%	0%	0%	20%	80%
Elsternwick	4.5	16.1	36%	30%	50%	20%	0%	0%	0%	0%
Moorabbin	3.5	7.0	28%	10%	20%	50%	20%	0%	0%	0%
Alma Village	2.5	5.9	20%	0%	10%	40%	20%	20%	10%	0%
Caulfield Park	3.5	19.4	28%	0%	20%	40%	30%	10%	0%	0%
Caulfield South	3.5	23.9	28%	10%	10%	40%	40%	0%	0%	0%
East Bentleigh	2.0	30.4	16%	0%	0%	10%	20%	30%	30%	10%
Gardenvale	2.5	0.9	20%	0%	0%	30%	30%	20%	20%	0%
Glen Huntly	3.5	16.8	28%	10%	10%	50%	30%	0%	0%	0%
Hughesdale	3.0	6.5	24%	0%	0%	60%	20%	20%	0%	0%
McKinnon	3.0	15.7	24%	0%	10%	60%	20%	10%	0%	0%
Murrumbeena	3.5	24.1	28%	10%	20%	50%	20%	0%	0%	0%
Ormond	3.0	35.2	24%	0%	20%	50%	20%	10%	0%	0%
Patterson	2.5	1.3	20%	0%	0%	20%	30%	30%	20%	0%
Ripponlea	2.5	0.6	20%	0%	10%	50%	20%	10%	10%	0%

Source: .id (2017), City of Glen Eira (2017)

Results

This assessment conservatively identifies opportunity for 12,722 additional dwellings in nominated Activity Centres (Figure 54) – excluding NRZ parcels. Removing dwellings assumed to be lost to demolition (966) and then accounting for dwellings on forecast development sites (7,217) the net result would be 18,973 additional dwellings. This is based on opportunities identified in 2016-17 and is not related to any specific timeframe.

Caulfield Junction has the most net dwellings identified through this process (2,674) and much of this detailed in the Caulfield Village Development Plan for this centre.

Other centres which are expected to experienced high levels of net dwelling gain include Carnegie (2,583), Elsternwick (2,106), Ormond (1,751) and Murrumbeena (1,620). As expected, the smaller centres, those with lower scores and large areas of NRZ had the least number of additional dwellings identified. Just 36 additional dwellings were identified in East Village and this consists of one development site on Murrumbeena Road. Other centres with minimal opportunity for additional housing include Patterson (25), Gardenvale (32) and Ripponlea (93).

Figure 54. Activity Centre analysis – development density results

Centre	Number of dwellings by density assumptions							Additional dwellings	Demolitions	Dwellings from forecast.id	Net dwellings
	300	250	200	150	100	75	50				
Bentleigh	273	342	365	68	0	0	0	1,048	90	569	1,527
Carnegie	556	772	247	0	0	0	0	1,575	101	1,109	2,583
Caulfield Junction	84	70	28	0	0	0	0	182	14	2,505	2,674
East Village	0	0	0	0	0	0	0	0	0	36	36
Elsternwick	520	723	231	0	0	0	0	1,474	89	721	2,106
Moorabbin	59	98	195	59	0	0	0	410	27	109	493
Alma Village	0	29	94	35	24	9	0	192	17	79	254
Caulfield Park	0	272	435	245	54	0	0	1,006	73	198	1,131
Caulfield South	201	168	536	402	0	0	0	1,307	120	164	1,352
East Bentleigh	0	0	97	146	146	110	24	523	70	383	836
Gardenvale	0	0	11	8	4	3	0	26	6	12	32
Glen Huntly	142	118	472	212	0	0	0	944	73	416	1,286
Hughesdale	0	0	189	47	31	0	0	267	23	43	287
McKinnon	0	94	451	113	38	0	0	695	53	248	890
Murrumbeena	202	337	674	202	0	0	0	1,415	82	287	1,620
Ormond	0	422	845	253	84	0	0	1,605	117	263	1,751
Patterson	0	0	10	11	8	4	0	33	8	0	25
Ripponlea	0	3	12	3	1	1	0	20	2	75	93
Total	2,037	3,447	4,892	1,806	390	126	24	12,722	966	7,217	18,973

Source: .id (2017), City of Glen Eira (2017)

Neighbourhood Residential Zone in Activity Centres

The Neighbourhood Residential Zone (NRZ) has specific prescriptive planning controls that necessitate separate treatment for the calculation of future housing opportunity. With the release of *Plan Melbourne 2017-2050*, these controls were altered. Previously, the NRZ prescribed one additional dwelling per lot, regardless of its size, but this has now been altered to a height limit (2 storeys) and for lots over 400m², there is a minimum garden area requirement.

In order to calculate additional in-centre NRZ dwelling opportunity, the following (conservative) approach was used.

Step 1: Identify developable NRZ land parcels

Development potential is influenced by parcel or lot size. For the purposes of this report, parcels less than 400m², or with an existing flat or apartment, or recently developed, or with non-residential uses (such as schools), are regarded as having no development potential. As summary of the distribution of in-centre developable NRZ land parcels by lot size is provided in Figure 55.

Step 2: Demolition and replacement assessment

The assessment is based on the following considerations:

i. Lot size

This indicates the potential (or attractiveness) for a lot to be redeveloped at a higher density. With a larger lot, the potential for higher yield increases. As

mentioned above, residential lots less than 400 m² are regarded as parcels with ‘no opportunity’. Residential lots with flats and apartments (strata parcels) are also regarded as parcels with ‘no opportunity’.

ii. Age of existing dwelling stock

Older residential areas have a greater potential to be redeveloped for newer developments. The age of the housing stock can mean it is often more economical to demolish a dwelling and replace it with higher density developments. Recent development sites are regarded as parcels with ‘no opportunity’.

iii. Planning, heritage or environmental significance (Garden area requirement)

Many older residential areas have some heritage significance. This influences the form of any residential redevelopment. Such constraints are often reflected in planning policies through parameters such as height limits, dwelling densities and forms considerate of neighbourhood characteristics.

Of relevance to the City of Glen Eira are the new planning controls affecting NRZ land, including the new minimum garden area requirement which is a minimum percentage of land that must be set aside for garden areas. The percentage of land set aside for this purpose increases with the size of the lot. It does not include driveways/car parking spaces. A summary of the mandatory garden area requirements by lot size is provided in Figure 56.

iv. Developable Area and Net Dwelling Gain

A **standard developable area** was estimated, by calculating median lot area for each of the lot ranges and then applying the mandatory garden area requirements to each of these ranges. An additional allocation for driveways/car parking space was also made.

An **average dwelling footprint** was then applied to the standard developable area to calculate total dwelling potential per lot. The average dwelling footprint was calculated by the average ground floor building size of a sample of residential building approvals on NRZ parcels in Glen Eira between 2015 and 2017.

Existing dwellings (1 per lot) were then subtracted from this total dwelling to calculate **net dwelling gain per lot**. A summary of this assessment is provided in Figure 56.

v. Land development assumption (turnover rate)

Finally, a turnover rate corresponding to each of the Activity Centre typology assessments (Figure 53) was applied to each of developable parcels (Figure 55). This is presented in Figure 57, and reflects the relative the development potential of the activity centre in which the NRZ parcels are located.

Figure 55. Lot size analysis – existing NRZ lots in Activity Centres, by small area

Activity Centre	Existing lots 400-500 sq m	Existing lots 501-650 sq m	Existing lots 651 -800 sqm	Existing lots 801-1,000 sqm	Existing lots 1,001-1,500 sqm	Existing lots above 1,501 sqm	Total
Bentleigh	30	494	488	40	21	0	1,073
Carnegie	56	191	48	7	1	0	303
Caulfield Junc	20	39	30	9	1	0	99
East Village	82	762	537	38	4	0	1,423
Elsternwick	179	320	183	51	27	0	760
Moorabbin	8	83	84	6	0	0	181
Alma Village	32	98	46	22	8	0	206
Caulfield Park	75	224	269	57	38	0	663
Caulfield Sout	201	356	370	75	7	0	1,009
East Bentleigl	44	682	347	53	6	0	1,132
Gardenvale	51	156	132	46	12	0	397
Glen Huntly	76	307	209	27	27	0	646
Hughesdale	8	108	137	12	6	0	271
McKinnon	57	470	194	54	3	0	778
Murrumbeena	13	66	71	30	10	0	190
Ormond	55	214	257	23	9	0	558
Patterson	17	429	176	22	6	0	650
Ripponlea	59	107	69	22	6	0	263
Glen Eira	1,063	5,106	3,647	594	192	0	10,602

Source: .id (2017)

Figure 56. Demolition and replacement assumption, NRZ lots in Activity Centres

	Existing lots 400-500 sq m	Existing lots 501-650 sq m	Existing lots 651 -800 sqm	Existing lots 801-1,000 sqm	Existing lots 1,001-1,500 sqm	Existing lots above 1,501 sqm
1. Median Area sq m	450m ²	575m ²	725m ²	900m ²	1,250m ²	1,750m ²
2. Driveways/parking & setbacks	15%	12%	11%	10%	10%	8%
3. Garden Area Requirement	25%	30%	35%	35%	35%	35%
4. Developable Area (sq m) [1 x(2+3)]	270m ²	334m ²	392m ²	495m ²	688m ²	998m ²
5. Average dwelling footprint (sq m)	170m ²	170m ²	170m ²	170m ²	170m ²	170m ²
6. Total Dwellings	1.6	2.0	2.3	2.9	4.0	5.9
7. Net Dwelling Gain (including demolition)	0.6	1.0	1.3	1.9	3.0	4.9

Figure 57. Dwelling opportunities on NRZ lots in Activity Centres

	Land development assumption (%)	Existing lots 400-500 sq m	Existing lots 501-650 sq m	Existing lots 651 -800 sqm	Existing lots 801-1,000 sqm	Existing lots 1,001-1,500 sqm	Existing lots above 1,501 sqm	Total
Net dwelling c	-	0.6	1.0	1.3	1.9	3.0	4.9	
Bentleigh	28%	5	133	178	21	18	0	355
Carnegie	36%	12	66	23	5	1	0	106
Caulfield Junc	36%	4	14	14	6	1	0	39
East Village	8%	4	59	56	6	1	0	125
Elsternwick	36%	38	111	86	35	30	0	299
Moorabbin	28%	1	22	31	3	0	0	58
Alma Village	20%	4	19	12	8	5	0	48
Caulfield Park	28%	12	60	98	31	32	0	234
Caulfield Sout	28%	33	96	135	40	6	0	310
East Bentleigl	16%	4	105	72	16	3	0	201
Gardenvale	20%	6	30	34	18	7	0	95
Glen Huntly	28%	13	83	76	14	23	0	209
Hughesdale	24%	1	25	43	6	4	0	79
McKinnon	24%	8	108	61	25	2	0	204
Murrumbeena	28%	2	18	26	16	9	0	70
Ormond	24%	8	49	80	11	7	0	155
Patterson	20%	2	83	46	8	4	0	142
Ripponlea	20%	7	21	18	8	4	0	58
Glen Eira		164	1,101	1,089	278	156	0	2,787

This process identifies opportunity for an additional 2,787 dwellings on NRZ parcels in Activity Centres (Figure 57). Together with the assumptions on the other zones, there is opportunity for an **additional 21,760 dwellings in Activity Centres** in the City of Glen Eira.

3.2.2 Opportunity for infill and other residential development outside Activity Centres

The gradual ageing of the dwelling stock, particularly where it falls into disrepair, is an important source of new housing supply in established parts of Australian cities. Infill development, typified by the demolition of an older house and its replacement by two or more new houses, has been one of the main drivers of dwelling growth in established suburbs across Australian cities, and Glen Eira has not been immune to this trend. This section looks at the potential for infill development outside the identified Activity Centres in Glen Eira based on an analysis of lot size and residentially zoned land.

Methodology

The conservative methodology to assess infill development potential outside Activity Centres defines out-of-centre catchment boundaries and categorises developable land by lot size (Figure 58). The process for assessing opportunities in these zones is described below:

Step 1: Identify suitable residential zones

The City of Glen Eira incorporates all three residential zones provided by the Victoria Planning Provisions. Each of these were considered separately in the analysis.

Though residential uses are permitted in other zones, they were not included as part of this analysis.

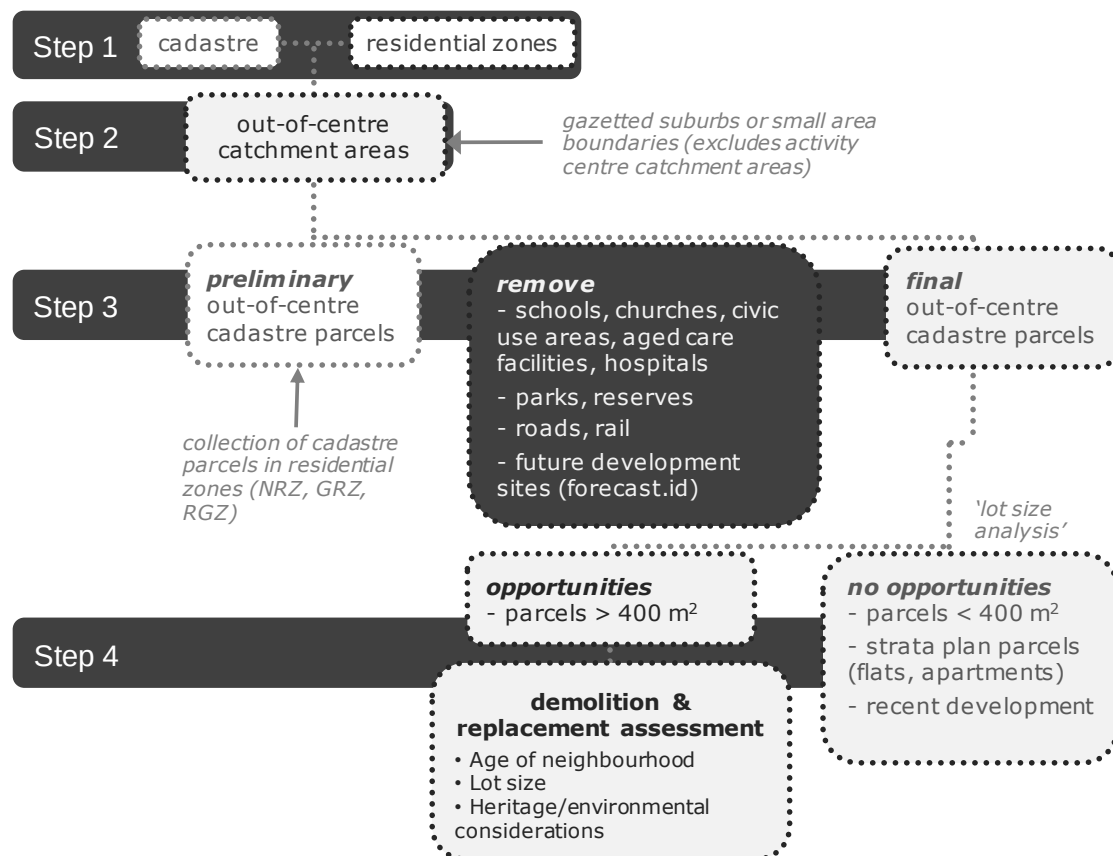
Step 2: Establish out-of-centre boundaries

Essentially the spatial unit under analysis is the land that falls within suburbs, but outside the Activity Centres.

Step 3: Calculate gross developable land

Land parcels unavailable for development are removed, resulting in a specified area of land available for development. This includes parcels that have been developed since 2007 (using the data presented in Figures 40-42) as well as non-residential uses.

Figure 58. Assessing infill development opportunities



Step 4: Identify developable land parcels

Development potential is influenced by parcel or lot size. For the purposes of this report, parcels less than 400m², or with an existing flat or apartment, or areas recently developed (since 2006) are regarded as having no development potential.

Step 5: Demolition and replacement assessment

The assessment is based on the following considerations:

vi. Lot size

This indicates the potential (or attractiveness) for a lot to be redeveloped at a higher density. With a larger lot, the potential for higher yield increases.

Residential lots less than 400 m² are regarded as parcels with 'no opportunity'. Residential lots with flats and apartments (strata parcels) are also regarded as parcels with 'no opportunity'.

vii. Age of existing dwelling stock

Older residential areas have a greater potential to be redeveloped for newer developments. The age of the housing stock can mean it is often more economical to demolish a dwelling and replace it with higher density developments (units, townhouses etc). In general, the older the area, the more likely it will attract higher density redevelopment activity. In contrast, areas developed in the last 10 years are less like to be developed in the next 20-30 years. Recent development sites are regarded as parcels with 'no opportunity' for a similar reason.

viii. Planning, heritage or environmental significance

Many older residential areas have some heritage significance and this influences the form of any residential redevelopment. Such constraints are often reflected in planning policies through parameters such as height limits, dwelling densities and forms considerate of neighbourhood characteristics. Assumptions for redevelopment in these areas reflect any relevant constraints.

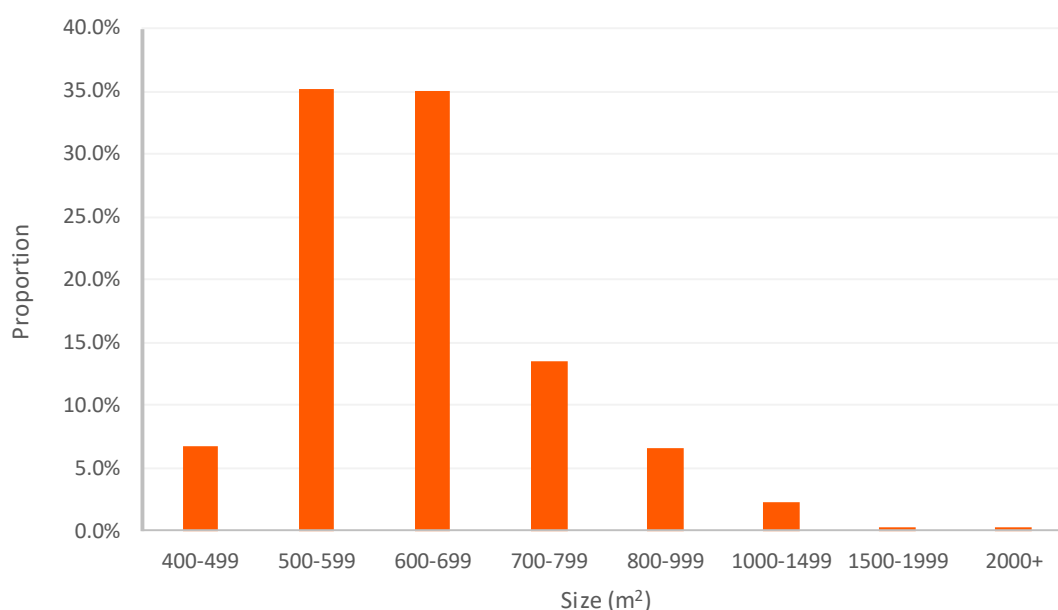
Lot size analysis by location

Dwelling growth in Melbourne's established suburbs occurs through redevelopment of former industrial (and other) sites which become available for this purpose.

However, this is not a readily available form of supply, and development trends indicate that a major source of additional dwelling supply is infill development on existing residential blocks. This is typified by the demolition of an existing dwelling, or subdivision of an existing block, and the construction of two or more new dwellings, therefore making more efficient use of urban land.

Figure 59 shows the number of potentially lots in infill locations by size. As described above, lots below 400m² are excluded from this table as they are deemed to be too small for infill development. Also excluded from this table are centres and sites identified in the previous section. This process identifies 12,780 lots above 400m² in the City of Glen Eira that can be potentially developed for additional housing. Around 70% of these are between 500 and 699 square metres in size.

Figure 59. *Lot size analysis – existing lots in infill areas*



Source: .id (2017)

However, not all parcels of land in established suburbs will be redeveloped, nor is the demand for infill development uniform across a municipality. Recent trends in Australian cities have shown that suburbs with older housing stock, particularly those closer to the CBD, are more likely to be redeveloped. Older housing stock is sometimes of inferior quality and expensive to bring up to contemporary housing standards eg through renovation or retrofitting with modern materials and appliances.

From this pool of potential infill supply outlined in Figure 59, we can make assumptions about the likely rate of development in each small area, and therefore make an assumption on the potential number of additional dwellings that can be achieved through infill development. Assumptions are largely conservative and consider the following:

- ▣ Contemporary patterns of building and subdivision activity
- ▣ New planning controls affecting Neighbourhood Residential and General Residential zoned land, with regard for mandatory height controls and minimum garden area requirements
- ▣ The age of the existing dwelling stock
- ▣ Proximity to the CBD and public transport nodes
- ▣ The size of the existing lot, with assumptions about the number of additional dwellings in the residential zones applied in the following way:

	Number of additional dwellings (yield)		
	NRZ	GRZ1	GRZ2
Lots less 400 sq m	0.0	0.0	0.0
Lots 400-500 sq m	0.6	2.0	2.0
Lots 501-650 sq m	1.0	3.3	3.3
Lots 651 -800 sqm	1.3	3.3	3.3
Lots 801-1,000 sqm	1.9	5.3	5.3
Lots 1,001-1,500 sqm	3.0	10.0	10.0
Lots above 1,501 sqm	4.9	20.0	20.0

The results of these assumptions are shown below (Figures 59 and 60).

Figure 60. Dwelling opportunities on existing lots (excluding Activity Centres and forecast.id developments sites) – Neighbourhood Residential Zone

Small area	Assumed development (%)	Existing lots 400-500 sq m	Existing lots 501-650 sq m	Existing lots 651 - 800 sqm	Existing lots 801-1,000 sqm	Existing lots 1,001-1,500 sqm	Existing lots above 1,501 sqm	Total
Bentleigh	25	6	136	108	17	2	4	271
Bentleigh East	25	18	776	377	59	11	21	1,263
Carnegie	25	23	156	87	36	11	2	314
Caulfield	25	4	39	42	21	8	1	115
Caulfield North - Caulfield East	25	19	93	145	121	126	32	536
Caulfield South	25	23	196	120	39	11	5	394
Elsternwick - Gardenvale	25	7	33	21	10	6	2	81
Glen Huntly	25	2	5	24	1	2	0	34
McKinnon	25	3	52	18	9	4	2	87
Murrumbeena	25	11	140	80	29	8	5	272
Ormond	25	5	52	77	4	1	0	138
St Kilda East	25	4	26	38	37	15	6	126
City of Glen Eira		124	1,704	1,137	381	204	80	3,631

Source: .id (2017)

Figure 61. Dwelling opportunities on existing lots (excluding Activity Centres and forecast.id developments sites) – General Residential Zone

	Assumed development (%)	Dwelling Opportunity						Total
		Existing lots 400-500 sq m	Existing lots 501-650 sq m	Existing lots 651 -800 sqm	Existing lots 801-1,000 sqm	Existing lots 1,001-1,500 sqm	Existing lots above 1,501 sqm	
General Residential Zone 1								
Ormond	30%	3	20	16	5	0	0	44
General Residential Zone 2								
Carnegie	35%	3	3	8	0	0	0	15
Caulfield	35%	0	2	1	4	0	0	7
Caulfield North - Caulfield East	35%	1	10	15	50	56	21	154
Caulfield South	35%	8	23	7	0	0	0	39
St Kilda East	35%	2	22	3	26	39	35	127
Glen Eira		18	82	51	85	95	56	387

The results of these assumptions indicate that there is opportunity for an additional **4,018 dwellings** in the City of Glen Eira (excluding forecast.id development sites, activity centres and heritage areas) through infill development, as shown in Figures 60 and 61.

3.2.3 Major development supply assessment – strategic redevelopment sites

The other major source of housing supply are redevelopment sites, which are scattered throughout the City and are typically on land formerly used for commercial purposes. Development sites become available simply through transfer of ownership or rezoning processes.

In late 2015, .id reviewed its population forecast for the City of Glen Eira and a number of strategic redevelopment sites (where the dwelling yield is 10 or more) were identified through this process. A significant number of development sites are located within Activity Centres and those assumed dwelling additions are included in Figure 62. A summary of the forecast.id sites with assumptions for additional dwellings from 2016 onwards (outside Activity Centres), are provided in Figure 61. This indicates opportunity for **192 dwellings**.

Figure 62. Dwellings assumed, identified development sites outside Activity Centres

Small Area	Dwellings assumed
Bentleigh	0
Bentleigh East	12
Carnegie	31
Caulfield	10
Caulfield North - Caulfield East	118
Caulfield South	0
Elsternwick - Gardenvale	0
Glen Huntly	0
McKinnon	0
Murrumbeena	0
Ormond	21
St Kilda East	0
City of Glen Eira	192

Source: *forecast.id* (2015)

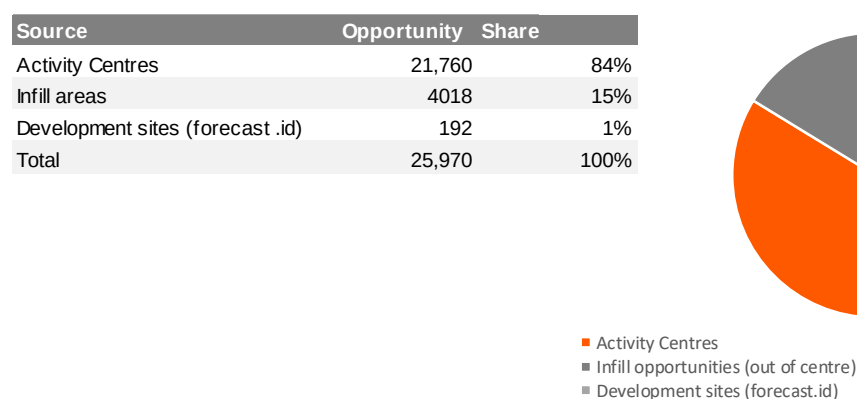
3.3 Housing supply summary

Conservatively, the City of Glen Eira has development sites available to provide a net gain of **25,970** dwellings (Figure 63). Opportunities for gains include:

- ▣ Development in designated Activity Centres;
- ▣ Realisation of strategic redevelopment sites;
- ▣ Redevelopment of larger residential lots outside Activity Centres

No assumptions have been made about the conversion of additional industrial or commercial land being rezoned for residential purposes and the dwelling yields that might arise from such a process.

Figure 63. Dwelling opportunity summary, City of Glen Eira



Source: .id and City of Glen Eira (2017)

* The lower estimate for housing opportunity on underutilised land was used in this table.

Based on the number of dwellings counted in the Census in 2011 and 2016 (an additional 3,545 dwellings over five years, or approximately 709 per annum), this represents about **36 years** of supply.

4. Conclusion

4.1 Housing consumption

The dominant household type in the City of Glen Eira is *couples with children*, comprising around 35% of the total. Notably, there has been a sharp increase in this household type since 2006 of around 19%, or 2,800 households. *Lone person households* comprised around 26% of the total, and *couples without children* just under 25%.

The share of household types is dissimilar to that of metropolitan Melbourne, with a smaller proportion of families (two and single parents) and a greater proportion of lone person households. This reflects several factors including the role and function of various suburbs within the City, the availability of dwelling stock and possibly housing affordability issues. Although three bedroom separate houses are the dominant dwelling type in the City, they have declined in number since 2006, whereas separate houses with four or more bedrooms have increased in number. These dwellings are suitable for family households and the proximity of much of the City to the CBD and good private schools creates the demand for families wanting to move to the area.

However there has also been strong growth in the number of medium and high density dwellings, particularly those with three or more bedrooms. Some of these will be dual occupancy and villa/townhouse style developments, but there has also been growth of smaller dwellings of one and two bedrooms in apartment buildings. Families who cannot afford larger separate dwellings may be able to access the Glen Eira housing market through purchase or rental of a medium density dwellings. However, in the cultural context of the Australian housing market, high density apartments are generally not viewed as suitable for families. They do tend to attract young adults who wish to be close to employment, education and lifestyle opportunities, but when they reach the family forming life cycle stage it may trigger a re-evaluation of their housing needs, which may involve a move outside the City.

The spatial distribution of the different household types is critical for planning services but at the same time, it is important to recognise how and why these are

changing over time. Changing age structures mean that Council resources need periodic review in order to ensure that age related services such as schools and aged care are provided in the right place at the right time. For example, a skateboard park will seem relevant when there are plenty of young and maturing families in the area, but once these households mature and those children move out of the area the demand for this type of facility will decrease.

The current housing stock in the City of Glen Eira is quite diverse, containing a mix of original houses on separate blocks, the redevelopment of some of these in to dual occupancies and multi-unit developments, and more recently, higher density apartments near transport hubs and along major arterials. In some locations, such as Elsternwick and Glen Huntly, apartments have been part of the urban fabric since the 1970s eg two and three storey brick apartment buildings. With no greenfield estates, future dwellings in the City can only come from redevelopment of non-residential land and further infill opportunities – which will become more limited over time, and are also constrained by the widespread application of the Neighbourhood Residential Zone. Diversifying housing choice by facilitating alternative housing options is crucial to meet future needs of emerging households and help maintain population levels to support a wide range of services and facilities, particularly as areas mature and undergo regeneration.

4.1.1 The emerging group

The housing consumption analysis identifies a shift away from smaller households towards family households over the last ten years. This is reflected in the changing age structure, with growth in the number of children (0-14 years), and some decline in the elderly population. In other words, there is significant churn in the Glen Eira population. This is typical of suburban areas that have developed over many decades, and they undergo suburban regeneration at different stages. Between 2006 and 2016, the key emerging household type in the City was *couple families with young children*, their numbers increasing by almost a quarter over this period. Couple families with young children were also the dominant household and have been since 2001, but the increase the numbers was a key change in household types over the ten years (2006-2016). In contrast, *couples without children* showed modest growth over the ten years and most of this was concentrated between 2006 and

2011. *Lone person households* declined slightly in number over the ten years, a trend that is in contrast to many inner suburban areas across Australia.

These shifts in household types reflect movements through the suburb life cycle (including ageing in place), changing preferences in living arrangements and possibly housing affordability. Life cycle events often trigger changes in household types eg children leaving home, marriage breakdown and declining health as do housing affordability issues eg a move away from lone person households to couple, group or even family households. The challenge is how to ensure that developers provide the right dwelling stock for emerging households and their revealed preferences, enabling residents to stay in the area and maintaining demand for services. While Council can facilitate the location and form of development through the planning system, developers and builders will respond to perceived housing preferences. This is demonstrated by the growth in larger dwellings (as measured by the number of bedrooms). Between 2006 and 2016, there was a decline in the number of separate houses with two or three bedrooms, but growth in those with four or more bedrooms. These dwellings cater well for family households, but at the same time there was growth in medium and high density dwellings regardless of the number of bedrooms, but notably most of this growth was in the three or more bedrooms category.

4.2 Housing opportunity

Housing supply comes from four mutually exclusive sources:

- ▣ Centres – identified in this report as Activity Centres
- ▣ Infill – residential development of typically older housing stock or on underutilised land not in Activity Centres
- ▣ Development Sites – larger sites that yield ten or more dwellings, typically on larger residential blocks (including amalgamation of lots), or involving the transfer of land use from industrial/commercial to residential

Using various methodologies outlined previously, this report has identified opportunities within the City of Glen Eira to provide a **net gain of 25,970 dwellings**. At 2011-2016 rates of development, this represents approximately 36 years of supply.

Most of this additional housing opportunity has been identified through opportunities for residential development within Activity Centres. This includes known development sites but also assumptions about the opportunity for further development based on assumed densities of development based on the “attractiveness” to the developer market. All up, opportunity for 21,760 dwellings was identified within Activity Centres. Most dwelling opportunity was identified in Caulfield Junction (2,674 dwellings) and Carnegie (2,583 dwellings).

It is important to recognise that housing opportunity does not equate to housing demand. The numbers presented here are about opportunity given a set of assumptions, whereas housing markets and demographics will influence the level of demand for additional housing in the City of Glen Eira. In addition, housing opportunity is not confined to a timeframe – what is presented here is merely reflective of assumptions made about future supply in 2016-17.

4.3 Policy considerations

The legacy of planning decision made in previous decades provide significant challenges for the future. In terms of housing policy, the key issue is how to encourage development of different dwelling types and sizes to cater for a diverse and evolving population. Changing housing preferences in the City of Glen Eira present significant challenges. There is a very large supply of larger dwellings (measured by the number of bedrooms) and while these cater well for families, they also house smaller households such as couples or lone person households. At first glance these households would appear to be overconsuming dwellings, but this does not consider social ties to place. Successive Commonwealth and State governments have periodically tackled the issue of how to encourage smaller, older households to move out of larger homes so that they can be sold to younger families. The latest initiatives indicate removal of financial barriers that discourage downsizing² and while this may make more properties available to the market it may also produce alternative outcomes such as people purchasing for investment or redevelopment.

² Source: The Australian, 11 March 2017, *Incentives for elderly to downsize homes*; retrieved online at <http://www.theaustralian.com.au/national-affairs/treasury/incentives-for-elderly-to-downsize-homes/news-story/017713973eadd884fcef4f0865181c15>

Another clear trend in the City of Glen Eira is the shift towards larger dwellings (as measured by the number of bedrooms). This is consistent with trends across metropolitan Australia, and in established areas much of it is the result of renovation or redevelopment of older housing stock. In the City of Glen Eira, the number of separate houses remained fairly stable between 2006 and 2016, but there was an 20% decline in the number with 0-3 bedrooms, and a 28% increase in those with four or more bedrooms. At the same time, the number of medium and high density dwellings, regardless of the number of bedrooms, increased. Although larger dwellings accommodate a wider range of household types, they are also less affordable and this may reduce population diversity.

The current metropolitan planning strategy, *Plan Melbourne 2017-2050*, was released in 2017 and outlined a vision for the future of Melbourne to 2050. It is typical of contemporary metropolitan strategies with regard to urban development eg intensifying residential development around key transport and employment nodes, and reducing the urban footprint by encouraging more residential development in established areas. Importantly, *Plan Melbourne 2017-2050* specifies dwelling targets (with two scenarios) for sub-regions within metropolitan Melbourne, but at the time of writing targets for each Local Government Area had not been announced. All up, under Scenario 1 – based on VIF 2016 – there is a target of 110,000 dwellings for the Inner South East region. Scenario 2 – which is aspirational – specifies a target of 125,000 dwellings. If dwelling targets are based on the share of existing dwellings in each LGA in the Inner South East region, the City of Glen Eira's target would be 26% of the total. This represents 28,600 dwellings under Scenario 1 and 32,500 under Scenario 2.

The City of Glen Eira is reasonably well placed with regard to meeting this target. Opportunity for an additional **25,970 dwellings** has been identified, mostly in Activity Centres. The assumptions are deliberately conservative in order to demonstrate that significant increases in housing stock can be obtained with relatively modest development assumptions. Within Activity Centres, there are already several residential sites that are under development and in addition to the known sites, this report has identified scope for additional dwellings at densities ranging from 50-300 dwellings per hectare. This is important because the potential for infill development across the City is impacted by the application of the NRZ zone, which limits the number of new dwellings through height controls and minimum garden area requirements. As a result it is important to identify those parts of the City where

additional housing can occur, in order to minimise the impact of new development on existing low density residential areas. Intensification in and around key sites can offer lifestyle choices to a range of housing markets, particularly given the access to local services, facilities and transport infrastructure in most centres. It also shows that existing neighbourhoods can be protected from high density development if future development is concentrated in designated Activity Centres, thus providing certainty to both residents and developers.

As population grow and evolve, the challenge for local government is to ensure that housing needs adapt accordingly. The City of Glen Eira has an increasingly diverse housing stock that caters for a range of household types and hence encourages the sustainability of local communities. Although there is a clear trend toward larger separate houses, there has also been an increase in the number of smaller medium and high density dwellings. In an Australian cultural context these are generally not of great appeal to families, but they do cater to smaller households, and their increasing number also offers greater scope for older residents to downsize within their local communities rather than moving elsewhere. The development of higher density dwellings should be complemented by other physical improvements in terms of amenity and attractiveness. This will ensure that development is occurring that will maximise the desirability to a range of housing markets.

It is often assumed that older people downsize from their family homes to units or retirement villages after the children leave home. However, the evidence and other research does not support this assertion³. It is clear from the Census data that smaller households with older people still overwhelmingly live in separate houses – albeit they are less likely to do so than family households. This is a legacy of the existing stock of housing in the City of Glen Eira (and the wider Melbourne metropolitan area) which is dominated by the separate house. Between 2006 and 2016 the number of older lone person households declined by 6% but the number living in larger dwellings increased. This may indicate an ageing in place process and can result in perceptions that these households are “overconsuming” housing, but it may also be indicative of barriers to downsizing such as a lack of options or financial disincentives.

³ For example, B. Judd et al, “Downsizing amongst older Australians” AHURI Report No. 214 (January 2014)

The cultural preference for larger dwellings is well entrenched in the Australian urban landscape. However, this will translate into demand for smaller dwellings in higher density developments is unclear. Housing choice is influenced by a number of factors including finance, job location, and personal circumstances. Surveys on housing choice and aspirations are rare but can offer valuable insights into the reasons behind housing decisions. This is where primary research can complement the findings of this report and provide further insight into the dynamics of the City of Glen Eira housing market.

5. Appendices

5.1 Net change in household type and dwelling type (detailed) – 2001-2011

Figure 64. Couples with children, net change by dwelling type (detailed) – 2006-2016

	No.	2006 %	BM %	No.	2011 %	BM %	No.	2016 %	BM %
Young couples with children									
Separate Houses*	6,400	77.1%	86.5%	6,656	70.7%	84.1%	6,181	59.7%	78.4%
Small: 0-2 bedrooms	604	7.3%	4.5%	559	5.9%	4.4%	457	4.4%	3.7%
Medium: 3 bedrooms	3,371	40.6%	46.3%	3,309	35.2%	42.1%	2,729	26.3%	35.8%
Large: 4+ bedrooms	2,394	28.8%	35.7%	2,768	29.4%	37.0%	2,963	28.6%	38.3%
Semi-detached & attached*	1,868	22.5%	13.2%	2,725	29.0%	15.8%	4,122	39.8%	21.2%
Small: 0-1 bedrooms	41	0.5%	0.3%	145	1.5%	0.5%	169	1.6%	0.7%
Medium: 2 bedrooms	755	9.1%	4.9%	1,085	11.5%	6.1%	1,649	15.9%	7.8%
Large: 3+ bedrooms	1,054	12.7%	7.9%	1,477	15.7%	9.0%	2,304	22.2%	12.5%
Other Dwelling	34	0.4%	0.3%	25	0.3%	0.2%	19	0.2%	0.2%
Dwelling not stated	0	0.0%	0.0%	3	0.0%	0.0%	36	0.3%	0.2%
Sub- total	8,302	100.0%	100.0%	9,409	100.0%	100.0%	10,358	100.0%	100.0%
Middle aged couples with children									
Separate Houses*	1,746	89.2%	93.7%	1,732	87.8%	92.8%	1,688	81.2%	90.0%
Small: 0-2 bedrooms	24	1.2%	0.9%	20	1.0%	1.0%	21	1.0%	1.0%
Medium: 3 bedrooms	569	29.1%	32.1%	546	27.7%	30.2%	462	22.2%	26.5%
Large: 4+ bedrooms	1,144	58.5%	59.8%	1,161	58.8%	60.8%	1,191	57.3%	61.4%
Semi-detached & attached*	204	10.4%	6.1%	235	11.9%	7.0%	386	18.6%	9.7%
Small: 0-1 bedrooms	0	0.0%	0.0%	0	0.0%	0.0%	3	0.1%	0.0%
Medium: 2 bedrooms	29	1.5%	0.6%	37	1.9%	0.8%	44	2.1%	1.0%
Large: 3+ bedrooms	169	8.6%	5.3%	198	10.0%	6.1%	339	16.3%	8.5%
Other Dwelling	7	0.4%	0.2%	6	0.3%	0.1%	3	0.1%	0.1%
Dwelling not stated	0	0.0%	0.0%	0	0.0%	0.0%	3	0.1%	0.1%
Sub- total	1,957	100.0%	100.0%	1,973	100.0%	100.0%	2,080	100.0%	100.0%
Older couples with children									
Separate Houses*	4,116	85.3%	92.3%	4,377	84.8%	92.1%	4,509	81.4%	89.2%
Small: 0-2 bedrooms	202	4.2%	2.4%	180	3.5%	2.2%	154	2.8%	1.9%
Medium: 3 bedrooms	1,967	40.7%	43.6%	1,883	36.5%	39.7%	1,737	31.3%	34.8%
Large: 4+ bedrooms	1,917	39.7%	45.6%	2,288	44.3%	49.6%	2,583	46.6%	51.5%
Semi-detached & attached*	700	14.5%	7.5%	760	14.7%	7.8%	1,011	18.2%	10.5%
Small: 0-1 bedrooms	6	0.1%	0.1%	10	0.2%	0.1%	8	0.1%	0.1%
Medium: 2 bedrooms	188	3.9%	1.6%	185	3.6%	1.5%	203	3.7%	1.8%
Large: 3+ bedrooms	500	10.4%	5.7%	562	10.9%	6.1%	800	14.4%	8.5%
Other Dwelling	12	0.2%	0.2%	19	0.4%	0.2%	3	0.1%	0.1%
Dwelling not stated	0	0.0%	0.0%	3	0.1%	0.0%	18	0.3%	0.2%
Sub- total	4,828	100.0%	100.0%	5,159	100.0%	100.0%	5,541	100.0%	100.0%

Source: ABS Census of Population and Housing

Figure 65. Couples without children, net change by dwelling type (detailed) – 2006-2016

	No.	2006 %	BM %	No.	2011 %	BM %	No.	2016 %	BM %
<u>Young couple without children</u>									
Separate Houses*	1,679	38.8%	58.2%	1,327	27.9%	53.4%	1,030	20.1%	45.8%
Small: 0-2 bedrooms	647	15.0%	10.8%	459	9.6%	9.3%	303	5.9%	7.0%
Medium: 3 bedrooms	845	19.5%	35.3%	671	14.1%	30.6%	503	9.8%	24.5%
Large: 4+ bedrooms	168	3.9%	11.4%	187	3.9%	13.0%	210	4.1%	13.5%
Semi-detached & attached*	2,621	60.6%	41.3%	3,381	71.0%	46.1%	4,046	79.1%	53.4%
Small: 0-1 bedrooms	496	11.5%	6.3%	815	17.1%	8.9%	979	19.1%	11.1%
Medium: 2 bedrooms	1,577	36.4%	24.3%	1,928	40.5%	26.2%	2,452	47.9%	30.0%
Large: 3+ bedrooms	525	12.1%	10.3%	607	12.8%	10.6%	615	12.0%	11.7%
Other Dwelling	20	0.5%	0.5%	48	1.0%	0.4%	31	0.6%	0.4%
Dwelling not stated	7	0.2%	0.0%	3	0.1%	0.1%	11	0.2%	0.4%
Sub- total	4,327	100.0%	100.0%	4,759	100.0%	100.0%	5,118	100.0%	100.0%
<u>Middle aged couple without children</u>									
Separate Houses*	2,143	72.0%	83.9%	2,176	69.9%	82.3%	1,881	63.9%	77.9%
Small: 0-2 bedrooms	405	13.6%	8.0%	376	12.1%	7.7%	280	9.5%	6.7%
Medium: 3 bedrooms	1,181	39.7%	49.5%	1,105	35.5%	45.9%	923	31.4%	40.5%
Large: 4+ bedrooms	540	18.2%	25.6%	683	21.9%	28.0%	661	22.5%	29.8%
Semi-detached & attached*	820	27.6%	15.6%	928	29.8%	17.2%	1,055	35.8%	21.5%
Small: 0-1 bedrooms	42	1.4%	0.9%	50	1.6%	1.1%	67	2.3%	1.4%
Medium: 2 bedrooms	326	11.0%	6.6%	383	12.3%	7.3%	437	14.8%	8.9%
Large: 3+ bedrooms	452	15.2%	7.9%	487	15.6%	8.6%	551	18.7%	10.9%
Other Dwelling	12	0.4%	0.4%	10	0.3%	0.4%	0	0.0%	0.3%
Dwelling not stated	0	0.0%	0.0%	0	0.0%	0.0%	8	0.3%	0.3%
Sub- total	2,975	100.0%	100.0%	3,114	100.0%	100.0%	2,944	100.0%	100.0%
<u>Older couple without children</u>									
Separate Houses*	2,867	72.2%	82.4%	2,868	72.0%	82.9%	3,069	69.9%	80.7%
Small: 0-2 bedrooms	602	15.2%	10.7%	506	12.7%	9.2%	462	10.5%	8.0%
Medium: 3 bedrooms	1,725	43.4%	52.6%	1,705	42.8%	51.1%	1,740	39.6%	46.7%
Large: 4+ bedrooms	478	12.0%	17.4%	603	15.1%	21.1%	824	18.8%	24.5%
Semi-detached & attached*	1,086	27.3%	17.2%	1,112	27.9%	16.8%	1,311	29.9%	18.9%
Small: 0-1 bedrooms	66	1.7%	1.2%	47	1.2%	1.0%	55	1.3%	1.0%
Medium: 2 bedrooms	533	13.4%	9.0%	516	13.0%	8.2%	524	11.9%	8.1%
Large: 3+ bedrooms	442	11.1%	6.6%	521	13.1%	7.2%	732	16.7%	9.4%
Other Dwelling	12	0.3%	0.3%	3	0.1%	0.3%	0	0.0%	0.2%
Dwelling not stated	6	0.2%	0.0%	0	0.0%	0.0%	10	0.2%	0.2%
Sub- total	3,971	100.0%	100.0%	3,983	100.0%	100.0%	4,390	100.0%	100.0%

Source: ABS Census of Population and Housing

Figure 66. Single parent families, net change by dwelling type (detailed) – 2006-2016

	No.	2006 %	BM %	No.	2011 %	BM %	No.	2016 %	BM %
Young single parent families									
Separate Houses*	721	57.1%	73.8%	736	58.4%	74.6%	669	50.5%	69.2%
Small: 0-2 bedrooms	147	11.6%	7.1%	140	11.1%	6.9%	100	7.5%	5.8%
Medium: 3 bedrooms	413	32.7%	47.2%	394	31.2%	44.1%	352	26.6%	37.9%
Large: 4+ bedrooms	149	11.8%	17.9%	191	15.1%	22.2%	209	15.8%	24.0%
Semi-detached & attached*	534	42.3%	25.8%	519	41.2%	25.1%	650	49.1%	30.2%
Small: 0-1 bedrooms	18	1.4%	0.6%	27	2.1%	0.8%	25	1.9%	1.1%
Medium: 2 bedrooms	302	23.9%	13.5%	295	23.4%	12.9%	331	25.0%	14.7%
Large: 3+ bedrooms	196	15.5%	10.9%	193	15.3%	10.8%	294	22.2%	13.6%
Other Dwelling	7	0.6%	0.4%	3	0.2%	0.2%	6	0.5%	0.3%
Dwelling not stated	0	0.0%	0.0%	3	0.2%	0.0%	0	0.0%	0.2%
Sub- total	1,262	100.0%	100.0%	1,261	100.0%	100.0%	1,325	100.0%	100.0%
Middle aged single parent families									
Separate Houses*	266	74.5%	84.7%	263	70.9%	83.9%	226	65.3%	80.7%
Small: 0-2 bedrooms	15	4.2%	1.8%	11	3.0%	2.0%	9	2.6%	2.0%
Medium: 3 bedrooms	135	37.8%	44.5%	124	33.4%	41.2%	104	30.1%	35.3%
Large: 4+ bedrooms	110	30.8%	36.5%	128	34.5%	39.1%	113	32.7%	41.5%
Semi-detached & attached*	91	25.5%	15.0%	105	28.3%	15.8%	120	34.7%	18.8%
Small: 0-1 bedrooms	0	0.0%	0.1%	0	0.0%	0.1%	0	0.0%	0.1%
Medium: 2 bedrooms	28	7.8%	2.8%	26	7.0%	3.3%	30	8.7%	3.8%
Large: 3+ bedrooms	63	17.6%	11.7%	79	21.3%	12.0%	90	26.0%	14.4%
Other Dwelling	0	0.0%	0.3%	3	0.8%	0.2%	0	0.0%	0.3%
Dwelling not stated	0	0.0%	0.0%	0	0.0%	0.1%	0	0.0%	0.2%
Sub- total	357	100.0%	100.0%	371	100.0%	100.0%	346	100.0%	100.0%
Older single parent families									
Separate Houses*	1,639	68.2%	78.8%	1,666	65.6%	78.8%	1,583	61.1%	75.6%
Small: 0-2 bedrooms	271	11.3%	7.2%	238	9.4%	6.7%	214	8.3%	5.9%
Medium: 3 bedrooms	941	39.2%	48.3%	903	35.5%	46.4%	850	32.8%	42.3%
Large: 4+ bedrooms	400	16.6%	21.8%	499	19.6%	24.4%	499	19.3%	25.8%
Semi-detached & attached*	756	31.5%	20.9%	860	33.8%	21.0%	994	38.4%	23.9%
Small: 0-1 bedrooms	20	0.8%	0.6%	34	1.3%	0.6%	29	1.1%	0.7%
Medium: 2 bedrooms	389	16.2%	10.0%	392	15.4%	9.3%	470	18.1%	9.9%
Large: 3+ bedrooms	344	14.3%	10.0%	420	16.5%	10.7%	495	19.1%	12.7%
Other Dwelling	4	0.2%	0.3%	12	0.5%	0.3%	8	0.3%	0.3%
Dwelling not stated	4	0.2%	0.0%	3	0.1%	0.0%	6	0.2%	0.2%
Sub- total	2,403	100.0%	100.0%	2,541	100.0%	100.0%	2,591	100.0%	100.0%

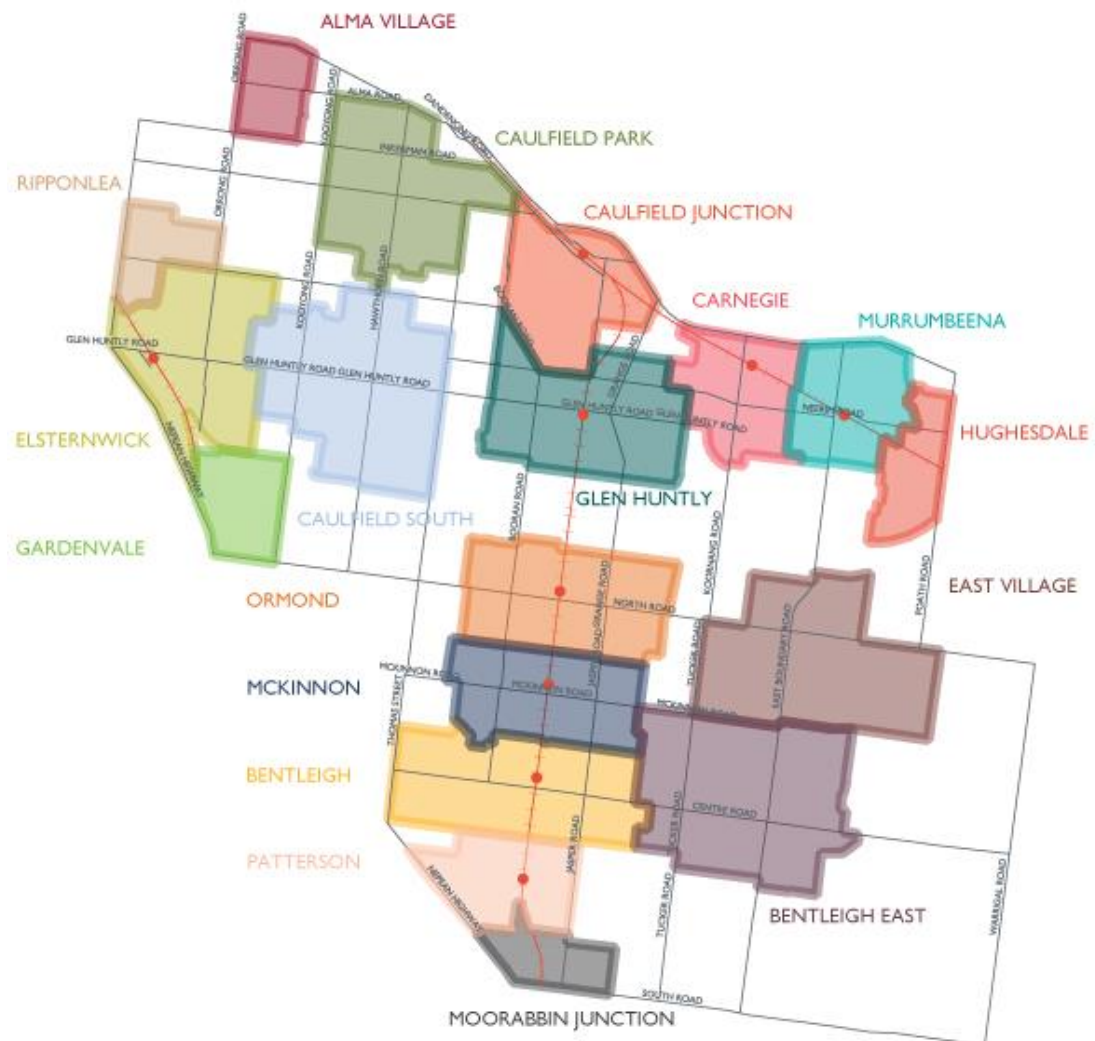
Source: ABS Census of Population and Housing

Figure 67. Lone person households, net change by dwelling type (detailed) – 2006-2016

	No.	2006 %	BM %	No.	2011 %	BM %	No.	2016 %	BM %
Young lone person household									
Separate Houses*	951	21.1%	40.8%	855	20.1%	40.1%	600	15.0%	32.4%
Small: 0-2 bedrooms	408	9.1%	10.2%	337	7.9%	9.4%	178	4.4%	6.6%
Medium: 3 bedrooms	406	9.0%	23.6%	370	8.7%	22.2%	260	6.5%	16.9%
Large: 4+ bedrooms	105	2.3%	5.7%	132	3.1%	7.2%	130	3.2%	7.1%
Semi-detached & attached*	3,518	78.1%	57.9%	3,351	78.8%	59.0%	3,355	83.7%	66.2%
Small: 0-1 bedrooms	1,628	36.1%	21.1%	1,520	35.8%	23.6%	1,596	39.8%	28.7%
Medium: 2 bedrooms	1,512	33.6%	28.1%	1,489	35.0%	26.8%	1,467	36.6%	27.8%
Large: 3+ bedrooms	292	6.5%	7.2%	283	6.7%	7.4%	292	7.3%	7.6%
Other Dwelling	23	0.5%	1.2%	38	0.9%	0.8%	27	0.7%	0.8%
Dwelling not stated	12	0.3%	0.0%	7	0.2%	0.1%	24	0.6%	0.7%
Sub- total	4,504	100.0%	100.0%	4,251	100.0%	100.0%	4,006	100.0%	100.0%
Middle aged lone person household									
Separate Houses*	1,482	37.9%	54.8%	1,530	37.5%	56.0%	1,287	32.4%	52.4%
Small: 0-2 bedrooms	588	15.0%	14.2%	581	14.2%	14.2%	422	10.6%	12.2%
Medium: 3 bedrooms	721	18.4%	32.2%	762	18.7%	32.4%	665	16.8%	30.0%
Large: 4+ bedrooms	139	3.6%	6.8%	157	3.8%	7.9%	159	4.0%	8.3%
Semi-detached & attached*	2,393	61.2%	43.8%	2,508	61.5%	42.6%	2,639	66.5%	45.9%
Small: 0-1 bedrooms	733	18.7%	11.0%	742	18.2%	10.8%	779	19.6%	12.0%
Medium: 2 bedrooms	1,253	32.0%	23.5%	1,307	32.1%	22.5%	1,388	35.0%	23.2%
Large: 3+ bedrooms	358	9.2%	7.9%	411	10.1%	8.1%	472	11.9%	9.3%
Other Dwelling	32	0.8%	1.4%	34	0.8%	1.3%	23	0.6%	1.2%
Dwelling not stated	3	0.1%	0.0%	6	0.1%	0.1%	20	0.5%	0.5%
Sub- total	3,910	100.0%	100.0%	4,078	100.0%	100.0%	3,969	100.0%	100.0%
Older lone person household									
Separate Houses*	2,922	50.9%	58.3%	2,760	49.9%	60.9%	2,553	47.5%	59.7%
Small: 0-2 bedrooms	979	17.1%	15.8%	916	16.5%	15.7%	733	13.6%	14.2%
Medium: 3 bedrooms	1,514	26.4%	33.6%	1,459	26.4%	35.1%	1,392	25.9%	34.3%
Large: 4+ bedrooms	245	4.3%	5.7%	255	4.6%	7.1%	319	5.9%	8.2%
Semi-detached & attached*	2,772	48.3%	41.1%	2,757	49.8%	38.4%	2,794	52.0%	39.3%
Small: 0-1 bedrooms	711	12.4%	11.1%	669	12.1%	9.7%	705	13.1%	9.2%
Medium: 2 bedrooms	1,416	24.7%	20.8%	1,407	25.4%	19.9%	1,482	27.6%	19.7%
Large: 3+ bedrooms	440	7.7%	6.0%	485	8.8%	6.4%	607	11.3%	7.8%
Other Dwelling	8	0.1%	0.6%	15	0.3%	0.7%	8	0.1%	0.6%
Dwelling not stated	34	0.6%	0.1%	3	0.1%	0.0%	23	0.4%	0.4%
Sub- total	5,736	100.0%	100.0%	5,535	100.0%	100.0%	5,378	100.0%	100.0%

Source: ABS Census of Population and Housing

5.2 Activity Centres – City of Glen Eira



Source: City of Glen Eira (2017)

6. Glossary

Activity Centre – A designated suburban centre, close to existing infrastructure, including transport and services, which has been earmarked in strategic planning documents for further development at higher densities than the surrounding region. As well as residential growth, commercial growth is also expected to focus on activity centres.

Apartment – A dwelling, usually part of a multi storey building. These dwellings usually do not have private grounds and usually share a common entrance foyer or stairwell.

Couple family without children – A household consisting of a couple by marriage or defacto relationship (including same-sex) who have no children present in the household.

Couple family with children - A household consisting of a couple by marriage or defacto relationship (including same-sex) with children present in the household

Family – Two or more people living in the same household, related by either a parent-child or couple relationship (either registered or defacto, and including same-sex couples). A family need not include children.

Flat – A dwelling, usually part of a multi storey building. These dwellings usually share a common entrance foyer or stairwell. Flats are similar to apartments but usually refer to buildings constructed between the 1930s and 1970s, generally between two and four storeys.

GCCSA (Greater Capital City Statistical Area) – this is a spatial unit defined in the 2011 Australian Statistical Geography Standard for the State capital cities. See also Melbourne Greater Capital City Statistical Area.

High Density Dwellings (using Census data) – Flats, units or apartments, generally without their own grounds, in a 3 or more storey block. Note that this definition is NOT based on the number of dwellings per hectare, as this is not available from Census. However high density housing is typically in the range of 50+ dwellings per hectare.

Household – A group of people living in the same dwelling, who generally make shared provision for food and other essentials.

Household Reference Person – Generally the first adult listed on the Census form. Usually defined by a parent-child or couple relationship. Other relationships in the same household are defined with reference to this person.

Lone person household – A household with only one person usually resident

Infill development – Dispersed housing redevelopment on existing sites in residential areas, usually currently containing older dwellings.

Inner South East Region – this region is defined by the Victorian State Government and comprises the LGAs of Glen Eira, Stonnington, Bayside and Boroondara.

Major sites – Sites identified by Council or through the Urban Development Program as large redevelopment areas for future growth.

Maturing couple family with children – Couple family with children aged both under and over 15.

Maturing couple family without children – A couple family without children, where the household reference person is aged 45-64 inclusive.

Maturing (or middle-aged) lone person household – A household with only one person usually resident, who is aged between 45 and 64 inclusive.

Melbourne metropolitan area – refers to the combined area of the 31 LGAs which comprise the urban area of Melbourne.

Melbourne Greater Capital City Statistical Area – this is a spatial unit introduced by the ABS in 2011. It covers the Melbourne metropolitan area but also includes outlying towns such as Bacchus Marsh, Macedon, Lancefield, Wallan and Kinglake

Melbourne Statistical Division – this is the spatial unit used to define Melbourne in statistical terms. It is similar to the Melbourne metropolitan area in that it includes the 31 LGAs, except for the eastern portion of Yarra Ranges Shire.

Middle-aged lone person household – See Maturing Lone Person Household.

Medium Density Dwellings (using Census data) – Semi-detached, terraces and villa units, with their own grounds but attached to another dwelling on at least one side, as well as flats or apartments without their own grounds, in 1 or 2 storey blocks. Note that this definition is NOT based on the number of dwellings per hectare, as this is not available from Census. However medium density housing is typically in the range of 25 to 50 dwellings per hectare.

Net migration – The difference between the number of people living in an area who lived elsewhere 5 years before, and the number who lived in the area 5 years before and now live elsewhere.

Older couple family with children – Couple family with children over 15 only.

Older couple family without children – A couple family without children, where the household reference person is aged 65+.

Older lone person household – A household with only one person usually resident, who is aged 65 or over.

Separate Houses – Houses on their own block, separated on all sides from other dwellings by at least 50cm. Commonly called detached dwellings.

Townhouse – An attached or semi-detached dwelling, usually of two storeys, with small amounts of private open space and a separate entrance. These dwellings often replace lower density single dwellings on larger suburban allotments.

Units – A dwelling, usually of one storey, with small amounts of private open space and a separate entrance. These dwellings often replace lower density single dwellings on larger suburban allotments. The term usually applies to dwellings constructed in the 1960s and 1970s.

Young couple family with children – Couple family with children under 15 only

Young couple family without children – A couple family without children, where the household reference person is aged 15-44 inclusive.

Young lone person household – A household with only one person usually resident, who is aged between 15 and 44 inclusive.