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Scenic Rim Housing Needs Assessment

Scenic Rim Regional Council



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As this report involves future market projections which can be affected by several unforeseen variables, they represent our best possible estimates at this point in time and no warranty is given that this particular set of projections will in fact eventuate.

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1 Introduction

Bull & Bear Economics was engaged by Scenic Rim Regional Council to undertake an update of the housing needs assessment for the Scenic Rim Local Government Area (LGA) originally prepared by CDM Smith in 2021, which utilised 2016 Census data as a key input. The following report has been updated to reflect data from the 2021 Census of Population and Housing. Additionally, the assessment has also provided high level discussion on affordable housing, including details on existing supply and potential needs into the future.

A key aspect of this study is to understand the future demand for housing across Scenic Rim LGA and within sixteen Study Areas identified by Scenic Rim Regional Council as part of the Draft Scenic Rim Growth Management Strategy. In planning housing in Study Areas, a key challenge is anticipating the likely demand for certain housing typologies and lot sizes in order to cater for changes in household (residents) preferences over time. The evolution of households over time occurs at a regional level, in terms of the mix of households at any given time, and at the individual household level over time.

Households evolve across their life cycle. They might start as a single person household, which then becomes a couple household, and in many instances becomes a couple household with dependent children, before reverting back to a couple household and then in some cases a single person household. Across any given LGA, households move through their respective life cycles at different times. For example, there may be people looking to find their first home after leaving their paternal home, while at the same time there may be people looking to downsize from their family home now that children have left. At various times in their life some people might need help to secure safe or supported housing. Sometimes households and families fracture.

The constant evolution of households across the LGA as they move through their respective lifecycles as they grow, shrink or splinter against a backdrop of an established housing stock changing incrementally through new additions, creates an imbalance between the needs of households and the housing stock available. The imbalance between household needs and the housing stock can create housing challenges. This analysis seeks to demonstrate any imbalance in the Scenic Rim context regarding small, medium and large dwellings with respect to the small, medium and large households. In some instances, this is reflective of a wealth effect¹, but can also point to affordability and diversity challenges. In an affordability sense, this imbalance can make it difficult for some households to secure affordable housing, because the housing is over-capitalised relative to their budget constraint. In terms of diversity, it can mean households wanting to downsize locally have no or only very limited options. Alternatively, it might mean that households requiring support and assistance don't have access to supported housing locally.

As a result of the COVID-19 pandemic, workers in South East Queensland had a sustained period of working from home, which has led to residents reconsidering the design of their homes. Spennemann (2021) identified that homes would need to allow for internal containment whilst also allowing all other occupants to function as normally as possible. Design academics at Griffith

¹ The wealth effect refers to the premise that consumers tend to spend more when the value of their assets rise (e.g. housing and shares).

University also identified that contemporary home designs included unnecessary rooms, but lacked outdoor spaces such as balconies or gardens.

G.J. Gardener (2022) identified the most notable aspects of home design affected by COVID-19 as:

- + Allowance for home offices, recognising that workers are increasingly working from home at least a portion of their working week;
- + Increased demand for home designs that consider space for a home gym or workout area;
- + Multi-use spaces that can work as an office, gym, remote learning space or recreational area within the home;
- + Increasing consideration for storage, with people buying more gym equipment, recreational toys, clothing and long lasting food and hygiene supplies since the start of COVID-19;
- + Increased focus on natural light within homes to provide a more pleasant living environment throughout the year;
- + Increased focus on liveable outdoor spaces, with a more cohesive flow between the indoors and outdoors;
- + Increased desire for functional and adaptable spaces, with customers less willing to compromise on practicality than prior to COVID-19;
- + Increased desire for open space living within the home; and
- + Less bedrooms in conjunction with large living spaces, with residents trading off bedrooms in lieu of home offices, gyms and communal living spaces.

The increased desire for space has meant SEQ residents have increasingly demanded detached dwelling product as opposed to attached dwellings. The implication for Scenic Rim is that the marketability of attached product in the region may be more challenging than prior to COVID-19 in the short to medium term, with developers increasingly needing to ensure the dwelling design has considered the provision of balconies/outdoor spaces, allowing for the flexibility to work from home, providing additional storage and is strategically located within proximity to services and facilities to provide an appealing proposition relative to a detached house.

A housing needs assessment aims to understand both the quantum of housing that might be required but also the type and size of housing. There is a diverse array of housing typologies, but some locations do not lend themselves to providing the full spectrum of housing typologies. For example, Scenic Rim LGA would not be expected to provide the medium or high rise multi-unit product which would commonly be delivered in more metropolitan LGAs. Hence the number of housing typologies relevant to Scenic Rim LGA is likely limited to detached dwellings. With respect to the Scenic Rim Housing Strategy, this means that the main consideration is the delivery of detached dwelling product on appropriately sized lots. As such, this assessment focusses on the diversity of lot sizes for detached dwellings in Scenic Rim LGA.

1.1 Report Structure

This report is structured as follows:

- + **Section 1 Introduction:** purpose of study and structure of the report;
- + **Section 2 Study Area Overview:** examines population and historical population growth and demographic and socio-economic analysis of the defined Study Areas;
- + **Section 3 Building Approvals:** details historic building approvals for dwellings within Scenic Rim LGA;
- + **Section 4 Property Market Overview:** provides an overview of the vacant residential land market within Scenic Rim LGA and Study Areas to understand the current and historic dynamics likely to influence housing demand;

- + **Section 5 Household Projections:** population and household projections for the sixteen Study Areas, Boonah SA2, Beaudesert SA2 and Tamborine–Canungra SA2 and Scenic Rim LGA;
- + **Section 6 Demand for Specialised Housing Typologies:** supply demand balance assessment of retirement village Independent Living Units (ILUs) (including manufactured home parks) and residential aged care places within Scenic Rim LGA;
- + **Section 7 Housing Need by Typology:** details the small, medium and large households to dwellings ratio for each of the Study Areas, relevant SA2s and Scenic Rim as a whole under the business-as-usual scenario and a policy intervention scenario;
- + **Section 8 Housing Need Projections:** household projections between 2016 and 2041 for small, medium and large dwellings for each of the Study Areas, relevant SA2s and Scenic Rim as a whole under the business-as-usual scenario and the policy intervention scenario; and
- + **Section 9 Other Considerations:** provides a high-level assessment of housing affordability and homelessness in Scenic Rim Regional Council;
- + **Section 10 Recommendations:** this section provides recommendations to Scenic Rim Regional Council in relation to housing need throughout the LGA; and
- + **Section 11 References:** details the data sources used throughout this report.

1.2 Study Area Definitions

The Draft Scenic Rim Growth Management Strategy identifies sixteen Study Areas to analyse. This assessment analyses key demographic and socio-economic characteristics for each area in order to estimate housing demand in Scenic Rim LGA and across the Study Areas. In order to obtain relevant historic data for the designated Study Areas, Statistical Area 1 (SA1) boundaries have been used. In some instances, the SA1 boundaries differ marginally to the boundary of the Study Area as defined in the Draft Scenic Rim Growth Management Strategy. However, as SA1 boundaries represent the smallest area for which the relevant data is available, this assessment has utilised data for the entire SA1 area.

The concordance of SA1s to each Study Area are detailed in Appendix A.

Generally, the 2021 Census SA1 boundaries align with 2016 Census SA1 boundaries, with the exception of minor boundary changes within the Beaudesert & Gleneagle and Beechmont catchments.

2 Study Area Overview

The purpose of this section is to obtain a comprehensive understanding of the demographic factors influencing housing need, affordability, and choice in each of the sixteen Study Areas.

2.1 Historic Population and Dwellings

As of 2021, the estimated resident population (ERP) of each Study Area (and growth relative to 2011) is as follows:

- + Aratula: 499 persons (up 52 persons);
- + Beaudesert and Gleneagle: 9,479 persons (up 1,532 persons);
- + Beechmont: 634 persons (up 105 persons);
- + Boonah: 3,735 persons (up 448 persons);
- + Bromelton: 441 persons (up 63 persons);
- + Canungra: 1,839 persons (up 273 persons);
- + Harrisville: 470 persons (up 31 persons);
- + Kalbar: 1,135 persons (up 191 persons);
- + Kooralbyn: 1,901 persons (up 495 persons);
- + Mount Alford: 419 persons (up 64 persons);
- + Peak Crossing: 528 persons (up 115 persons);
- + Rathdowney: 171 persons (down 36 persons);
- + Roadvale: 530 persons (up 78 persons);
- + Tamborine: 2,252 persons (up 408 persons);
- + Tamborine Mountain: 8,466 persons (up 1,212 persons); and
- + Warrill View: 347 persons (up 20 persons).

Between 2011 and 2021, Beaudesert and Gleneagle recorded the highest growth in number of persons, followed by Tamborine Mountain. These Study Areas represent major population growth areas within Scenic Rim LGA. In average annual growth terms, Kooralbyn recorded the highest average annual growth rate between 2011 and 2021 (3.1% per annum). This was followed by Peak Crossing (2.5% per annum), Tamborine (2.0% per annum), Kalbar (1.9% per annum), Beechmont (1.8% per annum), and Beaudesert and Gleneagle (1.8% per annum).

Rathdowney was the only Study Area to record a decline in total ERP (a decrease of 36 persons between 2011 and 2021).

Interestingly, each Study Area (except Aratula, Boonah, Harrisville, Rathdowney, and Warrill View) recorded average annual growth rates on par with (or above) the growth rates recorded between 2011 and 2021 for Scenic Rim LGA (1.6% per annum) and Queensland (1.6% per annum).

Whilst there was growth in the number of dwellings in most study areas between 2016 and 2021, the rate of growth was lower than anticipated, due to the general increase in average household size between 2016 and 2021. Our estimates indicate a few study areas recorded marginal declines in the number of dwellings between 2016 and 2021 due to this trend. Within Scenic Rim LGA, dwelling growth between 2016 and 2021 was particularly high in Beaudesert & Gleneagle and Kooralbyn study areas.

Table 2-1 below denotes the historic population in each Study Area and the benchmark areas of Scenic Rim LGA and Queensland between 2011 and 2021. Table 2-2 presents estimates of the historic number of households in each study area and the benchmark areas of Scenic Rim LGA and Queensland.

Table 2-1 Historic Population – Study Areas, Scenic Rim LGA and Queensland, 2011 to 2021

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Ave. Ann. Growth, 2011-21 (%)
Study Areas												
Aratula	447	445	457	494	485	464	487	504	514	499	499	1.1%
Beaudesert and Gleneagle	7,947	8,073	8,316	8,599	8,690	8,906	9,057	9,250	9,321	9,482	9,479	1.8%
Beechmont	529	538	546	554	561	570	581	593	614	636	634	1.8%
Boonah	3,287	3,305	3,425	3,559	3,542	3,625	3,682	3,700	3,699	3,691	3,735	1.3%
Bromelton	378	380	393	407	415	414	434	444	443	441	441	1.6%
Canungra	1,566	1,561	1,563	1,600	1,615	1,651	1,696	1,720	1,790	1,809	1,839	1.6%
Harrisville	439	424	431	434	432	436	442	457	472	481	470	0.7%
Kalbar	944	958	1,006	1,048	1,052	1,071	1,068	1,098	1,116	1,133	1,135	1.9%
Kooralbyn	1,406	1,471	1,562	1,652	1,693	1,706	1,775	1,775	1,826	1,874	1,901	3.1%
Mount Alford	355	361	362	371	381	394	395	405	414	408	419	1.7%
Peak Crossing	413	431	456	461	483	487	492	502	504	506	528	2.5%
Rathdowney	207	202	192	186	182	172	173	171	171	173	171	-1.9%
Roadvale	452	462	465	491	491	495	506	520	535	527	530	1.6%
Tamborine	1,844	1,875	1,894	1,988	1,990	2,014	2,075	2,112	2,163	2,213	2,252	2.0%
Tamborine Mountain	7,254	7,325	7,381	7,538	7,630	7,786	7,934	8,126	8,259	8,343	8,466	1.6%
Warrill View	327	329	328	330	337	339	339	340	345	341	347	0.6%
Benchmark Areas												
Scenic Rim LGA	37,437	37,966	38,732	39,882	40,307	40,984	41,749	42,576	43,120	43,622	44,027	1.6%
Queensland	4,476,778	4,568,687	4,652,824	4,719,653	4,777,692	4,845,152	4,927,629	5,009,424	5,093,884	5,175,245	5,221,233	1.6%

Source: QGSO (2021), Estimated resident population by SA1, Australia, 2011 to 2021p, Queensland Treasury, Brisbane; and QGSO (2021), Estimated resident population, Local government area (LGA), Queensland, 1991 to 2021p, Queensland Treasury, Brisbane

Table 2-2 Estimated Historic Households – Study Areas, Scenic Rim LGA and Queensland, 2011 to 2021

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Ave. Ann. Growth, 2011-21 (%)
Study Areas												
Aratula	173	174	180	197	195	188	192	193	192	181	181	0.5%
Beaudesert and Gleneagle	2,915	2,982	3,093	3,221	3,278	3,383	3,435	3,502	3,523	3,578	3,571	2.1%
Beechmont	187	193	199	205	210	217	217	216	219	223	218	1.6%
Boonah	1,340	1,343	1,387	1,436	1,425	1,453	1,464	1,460	1,448	1,433	1,439	0.7%
Bromelton	136	135	138	141	142	139	147	151	151	151	152	1.1%
Canungra	565	561	559	569	572	582	589	589	605	603	605	0.7%
Harrisville	149	146	150	154	155	159	158	161	163	163	156	0.5%
Kalbar	356	363	384	402	405	415	405	407	405	403	422	1.7%
Kooralbyn	575	604	644	684	704	712	740	739	759	778	788	3.2%
Mount Alford	140	144	146	152	158	166	166	171	175	173	178	2.4%
Peak Crossing	143	147	154	153	158	158	158	161	161	161	167	1.5%
Rathdowney	75	75	73	72	72	70	71	70	71	72	71	-0.5%
Roadvale	163	169	173	185	188	193	190	189	188	179	175	0.7%
Tamborine	608	621	631	666	670	681	680	671	668	664	657	0.8%
Tamborine Mountain	2,949	2,980	3,005	3,071	3,111	3,177	3,185	3,209	3,210	3,193	3,190	0.8%
Warrill View	112	113	113	114	117	118	119	120	122	122	125	1.1%
Benchmark Areas												
Scenic Rim LGA	14,159	14,377	14,686	15,142	15,323	15,601	15,702	15,824	15,840	15,840	16,100	1.3%
Queensland	1,703,345	1,738,751	1,771,216	1,797,107	1,819,663	1,845,819	1,858,386	1,870,448	1,883,258	1,894,684	1,893,064	1.1%

Source: Bull & Bear Economics estimates based on QGSO (2021), Estimated resident population by SA1, Australia, 2011 to 2021p, Queensland Treasury, Brisbane; and QGSO (2021), Estimated resident population, Local government area (LGA), Queensland, 1991 to 2021p, Queensland Treasury, Brisbane

2.2 Socio-Economic Profiles

The following sections highlight the key socio-economic characteristics of the sixteen catchment areas as of the 2016 and 2021 Censuses. At the time this report was prepared (July 2022), only the first release of 2021 Census data was available, with data relating to employment characteristics (e.g. labour market characteristics, employment by industry and occupation and qualification levels) forming the second release of 2021 Census data (due in October 2022). Therefore, the following socio-economic profiles are concentrated on age profile, households and dwelling characteristics specifically relevant to housing policy.

2.2.1 Aratula

Aratula comprises a single SA1 south of Harrisville, along the Cunningham Highway. In 2021, there were an estimated 499 persons in Aratula, residing in 181 dwellings.

The key socio-economic characteristics of this Study Area include:

- + In 2021, Aratula recorded a significantly lower proportion of residents aged between 45 and 54 years (8.4% of residents) when compared with Scenic Rim (14.2% of residents) and Queensland (13.1% of residents);
- + In line with the benchmarked areas, average household size in Aratula increased between 2016 and 2021, reaching an average of 2.8 persons per household in 2021;
- + Between 2016 and 2021, Aratula has consistently reported a lower average monthly mortgage repayment compared to Scenic Rim, whereby in 2021, monthly housing loans in Aratula was on average \$309 less than the wider local government area;
- + Between the 2016 and 2021 Census, Aratula recorded a decreasing incidence of small households (i.e. households comprised of 1 to 2 people), from 80.4% of households in 2016 to 67.7% of households in 2021; and
- + The small household to small dwelling ratio in Aratula decreased significantly between 2016 and 2021, from a ratio of 6.7 to a ratio of 3.7. Comparatively, the benchmarked areas recorded a much smaller decrease regarding the small household to small dwelling ratio.

Table 2-3 details the socio-economic characteristics of Aratula as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-3 Socio-Economic Characteristics – Aratula, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Aratula	Scenic Rim	Queensland	Aratula	Scenic Rim	Queensland
Age Distribution						
0-14 years	25.3%	18.9%	19.4%	19.6%	17.6%	18.7%
15-24 years	7.0%	10.5%	13.0%	9.7%	10.1%	12.4%
25-34 years	13.1%	8.7%	13.7%	11.0%	9.0%	13.6%
35-44 years	10.3%	12.2%	13.4%	12.3%	11.6%	13.3%
45-54 years	11.6%	14.9%	13.4%	8.4%	14.2%	13.1%
55-64 years	14.0%	14.4%	11.8%	16.3%	14.9%	11.9%
65+ years	19.7%	20.2%	15.3%	22.7%	22.6%	17.0%
Average age (years)	39.2	41.8	38.2	42.8	43.3	39.3
Household size	2.5	2.6	2.6	2.8	2.8	2.8
Household Finances						

	2016			2021		
	Aratula	Scenic Rim	Queensland	Aratula	Scenic Rim	Queensland
% of households fully owning home	37.6%	34.0%	27.4%	44.9%	38.3%	29.1%
% of households purchasing home	36.6%	33.3%	31.4%	34.2%	36.7%	34.4%
% of households renting	10.8%	22.8%	32.2%	15.8%	21.2%	33.1%
Average weekly household income	\$1,304	\$1,530	\$1,735	\$1,574	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,406	\$1,725	\$1,820	\$1,529	\$1,838	\$1,911
Average weekly rent payment	\$297	\$287	\$334	\$286	\$337	\$379
Average housing costs (as a % of income)	11.5%	12.9%	13.8%	10.6%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	80.4%	75.3%	74.7%	67.7%	61.6%	59.9%
Medium (3 and 4 People)	14.9%	20.8%	21.8%	20.3%	27.9%	30.5%
Large (>4 Persons)	4.8%	3.9%	3.5%	12.0%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	12.1%	17.9%	22.7%	16.8%	22.5%	22.5%
Medium (3 and 4 Bedroom)	79.9%	74.4%	70.1%	73.9%	69.5%	69.5%
Large (>4 Bedrooms)	8.0%	7.6%	7.1%	9.2%	8.0%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	6.7	4.2	3.3	3.7	2.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.2 Beaudesert and Gleneagle

The Beaudesert and Gleneagle Study Area comprises nineteen SA1s in Beaudesert. In 2021, there were an estimated 9,479 persons in Beaudesert and Gleneagle, residing in 3,571 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, the fastest growing age group in Beaudesert and Gleneagle was the 65 years and older cohort whereby the proportion of residents aged 65 years and older increased by 4.6% points;
- + Like the benchmarked areas, average household size increased but at a lower rate between 2016 and 2021, reaching an average of 2.7 persons per household in 2021;
- + The incidence of persons purchasing homes in Beaudesert and Gleneagle in 2021 (29.3% of residents) was significantly lower when compared to Scenic Rim (36.7% of residents);
- + In conjunction with the lower proportion of households being purchased in Beaudesert and Gleneagle, the proportion of rental households in Beaudesert and Gleneagle was significantly higher (33.7% of residents) when compared with Scenic Rim (21.2% of residents);
- + Between 2016 and 2021, the incidence of small households in Beaudesert and Gleneagle decreased from 76.8% of households to 64.3% of households; and
- + The small household to small dwelling ratio marginally decreased in Beaudesert & Gleneagle, from a ratio of 4.1 in 2016 to a ratio of 3.6 in 2021, in line with the decrease recorded at the local government level.

Table 2-4 details the socio-economic characteristics of Beaudesert and Gleneagle as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-4 Socio-Economic Characteristics – Beaudesert and Gleneagle, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Beaudesert & Gleneagle	Scenic Rim	Queensland	Beaudesert & Gleneagle	Scenic Rim	Queensland
Age Distribution						
0-14 years	20.2%	18.9%	19.4%	19.3%	17.6%	18.7%
15-24 years	12.6%	10.5%	13.0%	11.2%	10.1%	12.4%
25-34 years	10.2%	8.7%	13.7%	10.3%	9.0%	13.6%
35-44 years	10.7%	12.2%	13.4%	11.3%	11.6%	13.3%
45-54 years	13.4%	14.9%	13.4%	12.5%	14.2%	13.1%
55-64 years	12.4%	14.4%	11.8%	12.5%	14.9%	11.9%
65+ years	18.3%	20.2%	15.3%	22.9%	22.6%	17.0%
Average age (years)	38.7	41.8	38.2	42.3	43.3	39.3
Household size	2.6	2.6	2.6	2.7	2.8	2.8
Household Finances						
% of households fully owning home	28.2%	34.0%	27.4%	33.2%	38.3%	29.1%
% of households purchasing home	22.5%	33.3%	31.4%	29.3%	36.7%	34.4%
% of households renting	39.0%	22.8%	32.2%	33.7%	21.2%	33.1%
Average weekly household income	\$1,311	\$1,530	\$1,735	\$1,470	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,644	\$1,725	\$1,820	\$1,645	\$1,838	\$1,911
Average weekly rent payment	\$285	\$287	\$334	\$311	\$337	\$379
Average housing costs (as a % of income)	15.0%	12.9%	13.8%	14.7%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	76.8%	75.3%	74.7%	64.3%	61.6%	59.9%
Medium (3 and 4 People)	19.4%	20.8%	21.8%	25.9%	27.9%	30.5%
Large (>4 Persons)	3.8%	3.9%	3.5%	9.7%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	18.8%	17.9%	22.7%	18.1%	16.8%	22.5%
Medium (3 and 4 Bedroom)	76.7%	74.4%	70.1%	77.0%	73.9%	69.5%
Large (>4 Bedrooms)	4.5%	7.6%	7.1%	4.9%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	4.1	4.2	3.3	3.6	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.3 Beechmont

Beechmont comprises a single SA1 located between the Lamington Plateau and Tamborine Mountain. In 2021, there were an estimated 634 persons in Beechmont, residing in 218 dwellings.

The key socio-economic characteristics of this Study Area include:

- Between 2016 and 2021, the proportion of Beechmont residents aged 65 years and older increased significantly, from 13.9% in 2016 to 24.2% of residents. Notably, Beechmont also

recorded a significantly lower proportion of residents aged between 0 and 14 years compared to Scenic Rim in 2021;

- + In line with benchmarked areas, average household size increased in Beechmont but at a higher rate between 2016 and 2021, reaching an average of 2.9 persons per household in 2021;
- + Between the 2016 and 2021 Census, the incidence of households purchasing a home decreased in Beechmont, from 52.1% of households in 2016 to 46.2% of households in 2021. Comparatively, the proportion of fully owned households increased from 33.2% of households in 2016 to 37.8% of households in 2021;
- + The number of small households in Beechmont has decreased from 78.8% of households in 2016, to 66.5% of households in 2021; and
- + Between 2016 and 2021, Beechmont recorded a larger decrease in its small household to small dwelling ratio which is an improvement of the household to dwelling size fit, compared to the benchmarked areas, from 6.0 in 2016 to 4.4 in 2021.

Table 2-5 details the socio-economic characteristics of Beechmont as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-5 Socio-Economic Characteristics – Beechmont, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Beechmont	Scenic Rim	Queensland	Beechmont	Scenic Rim	Queensland
Age Distribution						
0-14 years	15.3%	18.9%	19.4%	12.4%	17.6%	18.7%
15-24 years	9.4%	10.5%	13.0%	6.8%	10.1%	12.4%
25-34 years	7.4%	8.7%	13.7%	9.6%	9.0%	13.6%
35-44 years	12.6%	12.2%	13.4%	11.9%	11.6%	13.3%
45-54 years	19.9%	14.9%	13.4%	13.3%	14.2%	13.1%
55-64 years	19.0%	14.4%	11.8%	21.7%	14.9%	11.9%
65+ years	13.9%	20.2%	15.3%	24.2%	22.6%	17.0%
Average age (years)	41.2	41.8	38.2	46.9	43.3	39.3
Household size	2.6	2.6	2.6	2.9	2.8	2.8
Household Finances						
% of households fully owning home	33.2%	34.0%	27.4%	37.8%	38.3%	29.1%
% of households purchasing home	52.1%	33.3%	31.4%	46.2%	36.7%	34.4%
% of households renting	13.3%	22.8%	32.2%	13.2%	21.2%	33.1%
Average weekly household income	\$1,607	\$1,530	\$1,735	\$1,884	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,717	\$1,725	\$1,820	\$1,980	\$1,838	\$1,911
Average weekly rent payment	\$367	\$287	\$334	\$440	\$337	\$379
Average housing costs (as a % of income)	15.9%	12.9%	13.8%	14.3%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	78.8%	75.3%	74.7%	66.5%	61.6%	59.9%
Medium (3 and 4 People)	19.6%	20.8%	21.8%	25.6%	27.9%	30.5%
Large (>4 Persons)	1.6%	3.9%	3.5%	7.9%	10.5%	9.6%

	2016			2021		
	Beechmont	Scenic Rim	Queensland	Beechmont	Scenic Rim	Queensland
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	13.1%	17.9%	22.7%	15.3%	16.8%	22.5%
Medium (3 and 4 Bedroom)	77.0%	74.4%	70.1%	74.4%	73.9%	69.5%
Large (>4 Bedrooms)	9.8%	7.6%	7.1%	10.3%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	6.0	4.2	3.3	4.4	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.4 Boonah

Boonah comprises eight SA1s in Boonah. In 2021, there were an estimated 3,735 persons in Boonah, residing in 1,439 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, the proportion of residents aged 65 years and older in Boonah increased by 5.1% points, from 25.9% of residents in 2016 to 31.0% of residents in 2021. In comparison to Scenic Rim and Queensland, Boonah had a higher proportion of residents aged 65 years and older;
- + Average household size in Boonah increased marginally to 2.6 persons per household in 2021. Comparatively, Scenic Rim and Queensland recorded an average household size of 2.8 persons in 2021;
- + Over the course of the 2016 and 2021 Censuses, average monthly mortgage repayments for households in Boonah decreased from \$1,516 per month to \$1,382 per month. Comparatively, average mortgage payments for households in Scenic Rim increased from \$1,725 per month to \$1,383 per month; and
- + Between 2016 and 2021, the incidence of small sized households decreased from 78.2% in 2016 to 69.2% of households in Boonah. However, the proportion of small sized households in Boonah was higher than that of Scenic Rim in 2021.

Table 2-6 details the socio-economic characteristics of Boonah as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-6 Socio-Economic Characteristics – Boonah, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Boonah	Scenic Rim	Queensland	Boonah	Scenic Rim	Queensland
Age Distribution						
0-14 years	16.1%	18.9%	19.4%	14.3%	17.6%	18.7%
15-24 years	9.9%	10.5%	13.0%	9.8%	10.1%	12.4%
25-34 years	8.7%	8.7%	13.7%	9.8%	9.0%	13.6%
35-44 years	10.4%	12.2%	13.4%	9.5%	11.6%	13.3%
45-54 years	11.6%	14.9%	13.4%	10.9%	14.2%	13.1%
55-64 years	13.6%	14.4%	11.8%	14.8%	14.9%	11.9%
65+ years	25.9%	20.2%	15.3%	31.0%	22.6%	17.0%
Average age (years)	43.3	41.8	38.2	48.0	43.3	39.3

	2016			2021		
	Boonah	Scenic Rim	Queensland	Boonah	Scenic Rim	Queensland
Household size	2.5	2.6	2.6	2.6	2.8	2.8
Household Finances						
% of households fully owning home	40.7%	34.0%	27.4%	46.6%	38.3%	29.1%
% of households purchasing home	27.8%	33.3%	31.4%	28.4%	36.7%	34.4%
% of households renting	22.8%	22.8%	32.2%	21.7%	21.2%	33.1%
Average weekly household income	\$1,320	\$1,530	\$1,735	\$1,511	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,516	\$1,725	\$1,820	\$1,382	\$1,838	\$1,911
Average weekly rent payment	\$243	\$287	\$334	\$301	\$337	\$379
Average housing costs (as a % of income)	11.6%	12.9%	13.8%	10.3%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	78.2%	75.3%	74.7%	69.2%	61.6%	59.9%
Medium (3 and 4 People)	19.3%	20.8%	21.8%	23.2%	27.9%	30.5%
Large (>4 Persons)	2.5%	3.9%	3.5%	7.6%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	21.9%	17.9%	22.7%	20.3%	16.8%	22.5%
Medium (3 and 4 Bedroom)	72.0%	74.4%	70.1%	73.8%	73.9%	69.5%
Large (>4 Bedrooms)	6.1%	7.6%	7.1%	6.0%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	3.6	4.2	3.3	3.4	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.5 Bromelton

Bromelton comprises two SA1s to the west of Beaudesert. In 2021, there were an estimated 441 persons in Bromelton, residing in 152 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, the proportion of residents aged 0 to 14 years in Bromelton decreased by 5.2% points, while the proportion of residents aged 65 years and older increased by 12.7% points. These trends were present in Scenic Rim over the same period, however to a lesser extent;
- + Average household size in Bromelton decreased marginally from 3.0 persons in 2016 to 2.9 persons in 2021; however, the average household size in Bromelton remains slightly higher than the benchmarked areas;
- + The proportion of households purchasing a home in Bromelton increased by 8.2% points between 2016 and 2021, while the proportion of households renting decreased by 7.0% points over the same period;
- + Between 2016 and 2021, average mortgage repayments increased by \$610 per month, from \$1,560 per month in 2016 to \$2,170 per month in 2021. Comparatively, average monthly mortgage repayments in Scenic Rim increased by \$113 per month over the same period;

- + The proportion of small households decreased in Bromelton, from 63.3% of households in 2016 to 54.3% of households in 2021. Notably, the proportion of small households in Bromelton was significantly lower than that of Scenic Rim in 2021; and
- + The small household to small dwelling ratio in Bromelton decreased significantly compared to the benchmarked areas, decreasing from a ratio of 6.2 in 2016 to a ratio of 4.2 in 2021.

Table 2-7 details the socio-economic characteristics of Bromelton as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-7 Socio-Economic Characteristics – Bromelton, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Bromelton	Scenic Rim	Queensland	Bromelton	Scenic Rim	Queensland
Age Distribution						
0-14 years	17.2%	18.9%	19.4%	12.0%	17.6%	18.7%
15-24 years	11.7%	10.5%	13.0%	14.1%	10.1%	12.4%
25-34 years	7.5%	8.7%	13.7%	8.3%	9.0%	13.6%
35-44 years	17.0%	12.2%	13.4%	12.5%	11.6%	13.3%
45-54 years	15.7%	14.9%	13.4%	14.6%	14.2%	13.1%
55-64 years	20.7%	14.4%	11.8%	15.6%	14.9%	11.9%
65+ years	10.2%	20.2%	15.3%	22.9%	22.6%	17.0%
Average age (years)	39.5	41.8	38.2	44.1	43.3	39.3
Household size	3.0	2.6	2.6	2.9	2.8	2.8
Household Finances						
% of households fully owning home	36.3%	34.0%	27.4%	40.2%	38.3%	29.1%
% of households purchasing home	27.4%	33.3%	31.4%	35.6%	36.7%	34.4%
% of households renting	23.7%	22.8%	32.2%	16.7%	21.2%	33.1%
Average weekly household income	\$1,800	\$1,530	\$1,735	\$1,947	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,560	\$1,725	\$1,820	\$2,170	\$1,838	\$1,911
Average weekly rent payment	\$289	\$287	\$334	\$354	\$337	\$379
Average housing costs (as a % of income)	9.3%	12.9%	13.8%	12.2%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	63.3%	75.3%	74.7%	54.3%	61.6%	59.9%
Medium (3 and 4 People)	26.7%	20.8%	21.8%	35.7%	27.9%	30.5%
Large (>4 Persons)	10.0%	3.9%	3.5%	10.0%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	10.2%	17.9%	22.7%	13.1%	16.8%	22.5%
Medium (3 and 4 Bedroom)	71.7%	74.4%	70.1%	73.8%	73.9%	69.5%
Large (>4 Bedrooms)	18.1%	7.6%	7.1%	13.1%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	6.2	4.2	3.3	4.2	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.6 Canungra

Canungra comprises four SA1s located to the south east of Tamborine Mountain. In 2021, there were an estimated 1,839 persons in Canungra, residing in 605 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, Canungra recorded 5.1% point decrease in the proportion of residents aged between 15 and 24 years, while the 35 to 44 years and the 65 years and older age cohorts recorded growth in the order of 2.0% and 3.4%, respectively. Notably, the proportion of residents aged 65 years and older in Canungra is significantly smaller than that of Scenic Rim and Queensland;
- + Across the past two Censuses, average household size in Canungra has remained higher than that of Scenic Rim and Queensland, reaching 3.0 persons per household in 2021;
- + Over the 2016 and 2021 Censuses, the proportion of households purchasing a home increased, while the proportion of households renting decreased. Notably, the proportion of households purchasing a home in Canungra (51.0% of households) was significantly higher than Scenic Rim (36.7% of households) and Queensland (34.4% of households);
- + Average mortgage repayments in Canungra have increased by \$188 per month between 2016 and 2021, from \$1,824 per month to \$2,012 per month. Comparatively, average monthly mortgage repayments increased by \$113 per month in Scenic Rim and by \$91 per month in Queensland, over the same period; and
- + Between 2016 and 2021, the proportion of small households in Canungra decreased significantly, while the proportion of medium and large households increased. Across this period, the same trends were present in Scenic Rim and Queensland.

Table 2-8 details the socio-economic characteristics of Canungra as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-8 Socio-Economic Characteristics – Canungra, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Canungra	Scenic Rim	Queensland	Canungra	Scenic Rim	Queensland
Age Distribution						
0-14 years	18.8%	18.9%	19.4%	20.2%	17.6%	18.7%
15-24 years	14.2%	10.5%	13.0%	9.1%	10.1%	12.4%
25-34 years	10.6%	8.7%	13.7%	10.1%	9.0%	13.6%
35-44 years	12.4%	12.2%	13.4%	14.4%	11.6%	13.3%
45-54 years	16.4%	14.9%	13.4%	16.5%	14.2%	13.1%
55-64 years	14.5%	14.4%	11.8%	14.9%	14.9%	11.9%
65+ years	11.5%	20.2%	15.3%	14.9%	22.6%	17.0%
Average age (years)	37.1	41.8	38.2	40.1	43.3	39.3
Household size	2.8	2.6	2.6	3.0	2.8	2.8
Household Finances						
% of households fully owning home	26.3%	34.0%	27.4%	30.7%	38.3%	29.1%
% of households purchasing home	42.5%	33.3%	31.4%	51.0%	36.7%	34.4%
% of households renting	19.3%	22.8%	32.2%	17.2%	21.2%	33.1%
Average weekly household income	\$1,795	\$1,530	\$1,735	\$2,091	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,824	\$1,725	\$1,820	\$2,012	\$1,838	\$1,911

	2016			2021		
	Canungra	Scenic Rim	Queensland	Canungra	Scenic Rim	Queensland
Average weekly rent payment	\$360	\$287	\$334	\$430	\$337	\$379
Average housing costs (as a % of income)	13.8%	12.9%	13.8%	14.9%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	68.9%	75.3%	74.7%	52.2%	61.6%	59.9%
Medium (3 and 4 People)	26.1%	20.8%	21.8%	35.2%	27.9%	30.5%
Large (>4 Persons)	5.0%	3.9%	3.5%	12.6%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	15.1%	17.9%	22.7%	12.3%	16.8%	22.5%
Medium (3 and 4 Bedroom)	77.3%	74.4%	70.1%	78.0%	73.9%	69.5%
Large (>4 Bedrooms)	7.6%	7.6%	7.1%	9.7%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	4.6	4.2	3.3	4.2	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.7 Harrisville

Harrisville comprises a single SA1 in Harrisville, east of the Cunningham Highway. In 2021, there were an estimated 470 persons in Harrisville, residing in 156 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, the proportion of residents aged 55 to 64 years and residents aged 65 years and older in Harrisville increased by 4.7% points and 4.8% points, respectively. However, the proportion of residents within these age groups in 2021 was still lower than that of Scenic Rim;
- + In 2021, the average age of Harrisville residents (37.7 years) was slightly lower than that of Queensland (39.3 years) and significantly lower than residents of Scenic Rim (43.3 years);
- + Average household size in Harrisville has remained higher than that of Scenic Rim and Queensland between 2016 and 2021, reaching an average of 3.0 persons per household in 2021;
- + The proportion of households fully owning a home in Harrisville increased significantly from 24.4% of households in 2016 to 35.6% of households in 2021. Comparatively, the proportion of households fully owning a home increased by 4.3% points in Scenic Rim and by 1.7% points in Queensland, over the same period;
- + Harrisville recorded a significant increase in average household income, increasing by \$475 per week between 2016 and 2021. In comparison, Scenic Rim recorded an increase of \$207 per week over this same period;
- + Average housing costs as a proportion of income decreased in Harrisville, from 14.8% in 2016 to 10.6% of income in 2021. Conversely, Scenic Rim and Queensland both recorded marginal increases in average housing costs over this period;
- + Between 2016 and 2021, the proportion of small households in Harrisville decreased significantly, while the proportion of medium and large households increased, in line with the State wide trend; and
- + In 2021, the small household to small dwelling ratio in Harrisville (ratio of 5.0) was significantly higher than Scenic Rim (ratio of 3.7) and Queensland (ratio of 2.7).

Table 2-9 details the socio-economic characteristics of Harrisville as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-9 Socio-Economic Characteristics – Harrisville, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Harrisville	Scenic Rim	Queensland	Harrisville	Scenic Rim	Queensland
Age Distribution						
0-14 years	20.4%	18.9%	19.4%	22.4%	17.6%	18.7%
15-24 years	10.5%	10.5%	13.0%	13.2%	10.1%	12.4%
25-34 years	12.2%	8.7%	13.7%	10.0%	9.0%	13.6%
35-44 years	14.5%	12.2%	13.4%	13.4%	11.6%	13.3%
45-54 years	16.4%	14.9%	13.4%	11.8%	14.2%	13.1%
55-64 years	9.1%	14.4%	11.8%	13.8%	14.9%	11.9%
65+ years	10.5%	20.2%	15.3%	15.3%	22.6%	17.0%
Average age (years)	34.1	41.8	38.2	37.7	43.3	39.3
Household size	2.7	2.6	2.6	3.0	2.8	2.8
Household Finances						
% of households fully owning home	24.4%	34.0%	27.4%	35.6%	38.3%	29.1%
% of households purchasing home	38.5%	33.3%	31.4%	42.9%	36.7%	34.4%
% of households renting	28.2%	22.8%	32.2%	21.5%	21.2%	33.1%
Average weekly household income	\$1,416	\$1,530	\$1,735	\$1,891	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,486	\$1,725	\$1,820	\$1,450	\$1,838	\$1,911
Average weekly rent payment	\$274	\$287	\$334	\$260	\$337	\$379
Average housing costs (as a % of income)	14.8%	12.9%	13.8%	10.6%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	72.5%	75.3%	74.7%	49.7%	61.6%	59.9%
Medium (3 and 4 People)	27.5%	20.8%	21.8%	39.3%	27.9%	30.5%
Large (>4 Persons)	0.0%	3.9%	3.5%	11.0%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	12.2%	17.9%	22.7%	9.9%	16.8%	22.5%
Medium (3 and 4 Bedroom)	82.3%	74.4%	70.1%	77.8%	73.9%	69.5%
Large (>4 Bedrooms)	5.4%	7.6%	7.1%	12.3%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	5.9	4.2	3.3	5.0	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.8 Kalbar

Kalbar comprises three SA1s to the north west of Boonah. In 2021, there were an estimated 1,210 persons in Kalbar, residing in 422 dwellings.

The key socio-economic characteristics of this Study Area include:

- Between 2016 and 2021, the largest age group in Kalbar shifted from the 0 to 14 years cohort to the 65 years and older cohort. In 2021, the 65 years and older age group was also the

largest cohort in Scenic Rim, and the second largest in Queensland (behind the 0 to 14 years age group);

- + Compared to Scenic Rim and Queensland, Kalbar recorded a higher growth in average household size between 2016 and 2021, reaching an average of 2.9 persons per household in 2021;
- + Over the past two Censuses, Kalbar recorded a higher increase in the proportion of households fully owning a home (7.9% point increase) when compared with Scenic Rim (4.3% point increase) and Queensland (1.7% point increase);
- + Average weekly household income in Kalbar increased by \$296 per week between 2016 and 2021. Comparatively, average weekly household income increased by \$207 per week in Scenic Rim and by \$217 per week in Queensland over this period;
- + Notably, in 2021 average mortgage repayments were significantly lower in Kalbar (\$1,483 per month) compared to Scenic Rim (\$1,838 per month);
- + Like Scenic Rim and Queensland, the proportion of small households has decreased significantly between 2016 and 2021, while the proportion of medium and large households has increased; and
- + In 2021, the small household to small dwelling ratio in Kalbar (ratio of 5.1) was significantly higher than Scenic Rim (ratio of 3.7) and Queensland (ratio of 2.7).

Table 2-10 details the socio-economic characteristics of Kalbar as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-10 Socio-Economic Characteristics – Kalbar, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Kalbar	Scenic Rim	Queensland	Kalbar	Scenic Rim	Queensland
Age Distribution						
0-14 years	22.9%	18.9%	19.4%	20.0%	17.6%	18.7%
15-24 years	9.1%	10.5%	13.0%	11.3%	10.1%	12.4%
25-34 years	10.9%	8.7%	13.7%	10.9%	9.0%	13.6%
35-44 years	12.8%	12.2%	13.4%	12.7%	11.6%	13.3%
45-54 years	14.0%	14.9%	13.4%	11.6%	14.2%	13.1%
55-64 years	12.9%	14.4%	11.8%	12.2%	14.9%	11.9%
65+ years	18.8%	20.2%	15.3%	21.2%	22.6%	17.0%
Average age (years)	40.0	41.8	38.2	40.9	43.3	39.3
Household size	2.6	2.6	2.6	2.9	2.8	2.8
Household Finances						
% of households fully owning home	36.4%	34.0%	27.4%	44.3%	38.3%	29.1%
% of households purchasing home	33.2%	33.3%	31.4%	35.1%	36.7%	34.4%
% of households renting	17.2%	22.8%	32.2%	16.6%	21.2%	33.1%
Average weekly household income	\$1,415	\$1,530	\$1,735	\$1,711	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,335	\$1,725	\$1,820	\$1,483	\$1,838	\$1,911
Average weekly rent payment	\$227	\$287	\$334	\$304	\$337	\$379
Average housing costs (as a % of income)	10.0%	12.9%	13.8%	10.0%	13.1%	14.2%
Household Size (% of Total Dwellings)						

	2016			2021		
	Kalbar	Scenic Rim	Queensland	Kalbar	Scenic Rim	Queensland
Small (1 to 2 People)	73.0%	75.3%	74.7%	58.2%	61.6%	59.9%
Medium (3 and 4 People)	23.1%	20.8%	21.8%	31.5%	27.9%	30.5%
Large (>4 Persons)	4.0%	3.9%	3.5%	10.3%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	13.7%	17.9%	22.7%	11.5%	16.8%	22.5%
Medium (3 and 4 Bedroom)	78.3%	74.4%	70.1%	83.5%	73.9%	69.5%
Large (>4 Bedrooms)	8.0%	7.6%	7.1%	5.0%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	5.3	4.2	3.3	5.1	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.9 Kooralbyn

Kooralbyn comprises two SA1s to the south west of Beaudesert. In 2021, there were an estimated 1,901 persons in Kooralbyn, residing in 788 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021, the age composition of Kooralbyn has shifted towards an older population, with the proportion of residents 44 years and younger decreasing while the proportion of residents 45 years and older has increased. As such, Kooralbyn has recorded a significantly higher proportion of residents 65 years and older (29.4% of residents) compared with Scenic Rim (22.6% of residents) and Queensland (17.0% of residents);
- + Between 2016 and 2021, average household size has remained lower than that of the benchmarked regions, recording an average of 2.4 persons per household in 2021;
- + The proportion of households fully owning a home in Kooralbyn has increased significantly from 2016, whereby in 2021, the proportion of households fully owning a home in Kooralbyn was higher than that of Scenic Rim at 40.1% of households;
- + Between 2016 and 2021, average weekly household income in Kooralbyn increased by \$148 per week. As such, in 2021 average weekly household income in Kooralbyn (\$1,211 per week) was significantly lower than in Scenic Rim (\$1,737 per week) and Queensland (\$1,952 per week);
- + Average housing costs over the 2016 to 2021 period as a proportion of income decreased in Kooralbyn, while Scenic Rim and Queensland recorded an increase in average housing costs;
- + Like Scenic Rim and Queensland, the proportion of small households in Kooralbyn decreased between 2016 and 2021, while the proportion of medium and large households increased;
- + Across the 2016 and 2021 period, the proportion of small dwellings decreased in Kooralbyn, while the proportion of large dwellings increased. Comparatively, Scenic Rim and Queensland recorded similar trends, however the proportion of medium dwellings also decreased marginally in the benchmarked regions; and
- + In 2021, the small household to small dwelling ratio in Kooralbyn (ratio of 2.7) was in line with Queensland (ratio of 2.7) but lower than Scenic Rim (ratio of 3.7).

Table 2-11 details the socio-economic characteristics of Kooralbyn as of the 2016 and 2021 Census, benchmarked to Scenic Rim LGA and Queensland.

Table 2-11 Socio-Economic Characteristics – Kooralbyn, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Kooralbyn	Scenic Rim	Queensland	Kooralbyn	Scenic Rim	Queensland
Age Distribution						
0-14 years	18.9%	18.9%	19.4%	14.6%	17.6%	18.7%
15-24 years	10.2%	10.5%	13.0%	8.1%	10.1%	12.4%
25-34 years	7.2%	8.7%	13.7%	5.7%	9.0%	13.6%
35-44 years	12.6%	12.2%	13.4%	8.8%	11.6%	13.3%
45-54 years	14.6%	14.9%	13.4%	15.5%	14.2%	13.1%
55-64 years	15.2%	14.4%	11.8%	17.9%	14.9%	11.9%
65+ years	20.9%	20.2%	15.3%	29.4%	22.6%	17.0%
Average age (years)	41.8	41.8	38.2	48.1	43.3	39.3
Household size	2.4	2.6	2.6	2.4	2.8	2.8
Household Finances						
% of households fully owning home	30.4%	34.0%	27.4%	40.1%	38.3%	29.1%
% of households purchasing home	36.6%	33.3%	31.4%	36.9%	36.7%	34.4%
% of households renting	24.3%	22.8%	32.2%	20.0%	21.2%	33.1%
Average weekly household income	\$1,063	\$1,530	\$1,735	\$1,211	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,346	\$1,725	\$1,820	\$1,358	\$1,838	\$1,911
Average weekly rent payment	\$228	\$287	\$334	\$268	\$337	\$379
Average housing costs (as a % of income)	15.9%	12.9%	13.8%	14.0%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	82.7%	75.3%	74.7%	73.3%	61.6%	59.9%
Medium (3 and 4 People)	15.0%	20.8%	21.8%	20.1%	27.9%	30.5%
Large (>4 Persons)	2.3%	3.9%	3.5%	6.6%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	29.2%	17.9%	22.7%	27.3%	16.8%	22.5%
Medium (3 and 4 Bedroom)	66.6%	74.4%	70.1%	66.0%	73.9%	69.5%
Large (>4 Bedrooms)	4.3%	7.6%	7.1%	6.7%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	2.8	4.2	3.3	2.7	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.10 Mount Alford

Mount Alford comprises a single SA1 located to the south west of Boonah. In 2021, there were an estimated 419 persons in Mount Alford, residing in 178 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between the 2016 and 2021 Censuses, the incidence of persons aged 55 years to 64 years in Mount Alford increased from 17.0% of the population in 2016, to 23.7% of the population in 2021. This portion of the population increased within Scenic Rim LGA and Queensland but to a much lesser extent;

- + The average age of residents in Mount Alford increased from 42.6 years in 2016 to 47.8 years in 2021;
- + Average household size within Mount Alford decreased between 2016 and 2021, from 2.4 residents per household in 2016, to 2.3 households in 2021. Oppositely, the average number of residents per household in the benchmarked areas increased over the period;
- + The proportion of fully owned households within Mount Alford increased by 7.7% points over the period, from 37.3% of households in 2016 to 45.0% of households in 2021. On the other hand, the proportion of households renting decreased from 19.3% of households in 2016 to 12.4% of households in 2021;
- + As of 2021, average weekly household income within Mount Alford remained relatively constant from 2016 levels (decreasing by only \$7). However, average monthly mortgage repayments and weekly rent payments within Mount Alford increased by \$273 and \$126 respectively. Hence, housing costs as a proportion of household income within Mount Alford increased from 9.6% in 2016 to 11.2% in 2021; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in Mount Alford was marginally higher than the number of small dwellings (studio to two bedrooms) in 2016 (ratio of 4.0) and 2021 (ratio of 3.2).

Table 2-12 below details the socio-economic characteristics of Mount Alford as of the 2016 and 2021 Censuses, benchmarked to Scenic Rim LGA and Queensland.

Table 2-12 Socio-Economic Profile – Mount Alford, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Mount Alford	Scenic Rim	Queensland	Mount Alford	Scenic Rim	Queensland
Age Distribution						
0-14 years	13.6%	18.9%	19.4%	14.1%	17.6%	18.7%
15-24 years	7.0%	10.5%	13.0%	8.8%	10.1%	12.4%
25-34 years	5.7%	8.7%	13.7%	6.8%	9.0%	13.6%
35-44 years	8.1%	12.2%	13.4%	5.5%	11.6%	13.3%
45-54 years	16.2%	14.9%	13.4%	15.6%	14.2%	13.1%
55-64 years	17.0%	14.4%	11.8%	23.7%	14.9%	11.9%
65+ years	23.2%	20.2%	15.3%	25.4%	22.6%	17.0%
Average age (years)	42.6	41.8	38.2	47.8	43.3	39.3
Household size	2.4	2.6	2.6	2.3	2.8	2.8
Household Finances						
% of households fully owning home	37.3%	34.0%	27.4%	45.0%	38.3%	29.1%
% of households purchasing home	34.8%	33.3%	31.4%	35.5%	36.7%	34.4%
% of households renting	19.3%	22.8%	32.2%	12.4%	21.2%	33.1%
Average weekly household income	\$1,788	\$1,530	\$1,735	\$1,781	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,701	\$1,725	\$1,820	\$1,974	\$1,838	\$1,911
Average weekly rent payment	\$179	\$287	\$334	\$305	\$337	\$379
Average housing costs (as a % of income)	9.6%	12.9%	13.8%	11.2%	13.1%	14.2%
Household Size (% of Total Dwellings)						

	2016			2021		
	Mount Alford	Scenic Rim	Queensland	Mount Alford	Scenic Rim	Queensland
Small (1 to 2 People)	78.0%	75.3%	74.7%	70.7%	61.6%	59.9%
Medium (3 and 4 People)	22.0%	20.8%	21.8%	19.5%	27.9%	30.5%
Large (>4 Persons)	0.0%	3.9%	3.5%	9.8%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	19.6%	17.9%	22.7%	22.2%	16.8%	22.5%
Medium (3 and 4 Bedroom)	75.5%	74.4%	70.1%	69.8%	73.9%	69.5%
Large (>4 Bedrooms)	4.9%	7.6%	7.1%	8.0%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	4.0	4.2	3.3	3.2	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.11 Peak Crossing

Peak Crossing comprises a single SA1 to the north of Harrisville. In 2021, there were an estimated 528 persons in Peak Crossing, residing in 167 dwellings.

The key characteristics of this Study Area include:

- + Within Peak Crossing, the largest shift in population demographics between 2016 and 2021 was the proportion of residents aged 65 years and older. This portion of the population increased from 9.0% of the total population in 2016, to 13.7% of the total population as of 2021;
- + Evidently, the average age of Peak Crossing increased from 31.6 years in 2016, to 36.9 years in 2021. This shift in average age was significantly larger than the benchmarked areas;
- + The proportion of households with a mortgage within Peak Crossing increased by 8.6% points over the period, from 50.0% in 2016, to 58.6% in 2021. Similar to the trend observed within the broader Scenic Rim region, the proportion of households rented decreased within Peak Crossing, from 11.7% of households in 2016, to 8.9% of households in 2021;
- + Average weekly household income within Peak Crossing increased significantly across the period, from \$1,813 in 2016 to \$2,260 as of 2021;
- + As a result of a decrease in average monthly mortgage repayments with Peak Crossing, housing costs as a proportion of income decreased within Peak Crossing from 16.3% in 2016, to 12.7% as of 2021. On the other hand, housing costs as a proportion of household income increased within both Scenic Rim LGA and Queensland in the 2016 to 2021 period; and
- + The small household to small dwelling ratio suggests that the number of small household (one to two persons) in Peak Crossing was higher than the number of small dwellings (studio to two bedrooms) in 2016 at a ratio of 13.6. However, the ratio decreased to 8.9 in 2021, representing a decrease in small households within Peak Crossing.

Table 2-13 below details the socio-economic characteristics of Peak Crossing as of the 2016 and 2021 Censuses, benchmarked

Table 2-13 Socio-Economic Profile – Peak Crossing, Scenic Rim LGA and Queensland, 2016 to 2021

	2016			2021		
	Peak Crossing	Scenic Rim	Queensland	Peak Crossing	Scenic Rim	Queensland
Age Distribution						
0-14 years	23.7%	18.9%	19.4%	26.6%	17.6%	18.7%
15-24 years	12.4%	10.5%	13.0%	8.3%	10.1%	12.4%
25-34 years	10.7%	8.7%	13.7%	9.1%	9.0%	13.6%
35-44 years	16.6%	12.2%	13.4%	15.5%	11.6%	13.3%
45-54 years	14.3%	14.9%	13.4%	15.7%	14.2%	13.1%
55-64 years	7.6%	14.4%	11.8%	11.1%	14.9%	11.9%
65+ years	9.0%	20.2%	15.3%	13.7%	22.6%	17.0%
Average age (years)	31.6	41.8	38.2	36.9	43.3	39.3
Household size	3.1	2.6	2.6	3.2	2.8	2.8
Household Finances						
% of households fully owning home	29.2%	34.0%	27.4%	32.5%	38.3%	29.1%
% of households purchasing home	50.0%	33.3%	31.4%	58.6%	36.7%	34.4%
% of households renting	11.7%	22.8%	32.2%	8.9%	21.2%	33.1%
Average weekly household income	\$1,813	\$1,530	\$1,735	\$2,260	\$1,737	\$1,952
Average monthly housing loan repayment	\$2,271	\$1,725	\$1,820	\$1,915	\$1,838	\$1,911
Average weekly rent payment	\$286	\$287	\$334	\$321	\$337	\$379
Average housing costs (as a % of income)	16.3%	12.9%	13.8%	12.7%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	66.2%	75.3%	74.7%	44.4%	61.6%	59.9%
Medium (3 and 4 People)	31.7%	20.8%	21.8%	38.3%	27.9%	30.5%
Large (>4 Persons)	2.1%	3.9%	3.5%	17.3%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	4.9%	17.9%	22.7%	5.0%	16.8%	22.5%
Medium (3 and 4 Bedroom)	81.9%	74.4%	70.1%	77.5%	73.9%	69.5%
Large (>4 Bedrooms)	13.2%	7.6%	7.1%	17.5%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	13.6	4.2	3.3	8.9	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.12 Rathdowney

Rathdowney comprises a single SA1 located south of Beaudesert. In 2021, there were an estimated 171 persons in Rathdowney, residing in 71 dwellings.

The key socio-economic characteristics of this Study Area include:

- + As of the 2016 Census, Rathdowney was characterised by a larger incidence of residents aged over 55 years (representing 42.0% of the population. As of the 2021 Censuses, this proportion of residents increased to 52.9% of the population. Notably, over the period, the proportion of residents aged between 15 to 24 years decreased from 11.2% in 2016 to 1.9% in 2021;
- + The average age of residents in Rathdowney increased significantly between the two Censuses, from 41.5 years in 2016, to 50.9 years as of 2021;
- + Average weekly household incomes within Rathdowney increased at a lower rate than the benchmarked areas, increasing from \$1,250 in 2016 to \$1,289 in 2021;
- + Unlike the trends observed within the benchmarked areas, average monthly mortgage repayments decreased significantly, from \$1,300 in 2016, to \$991 in 2021;
- + As a result, housing costs as a proportion of household income decreased within Rathdowney, from 12.2% in 2016, to 8.6% in 2021, which was against the trend recorded in both Scenic Rim LGA and Queensland; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in Rathdowney was higher than the number of small dwellings (studio to two bedrooms) in 2016 and 2021, with a ratio of 3.8 in 2016, and 3.2 as of 2021.

Table 2-14 below summarises the socio-economic characteristics of Rathdowney, Scenic Rim LGA and Queensland as of 2016 and 2021.

Table 2-14 Socio-Economic Profile – Rathdowney, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Rathdowney	Scenic Rim	Queensland	Rathdowney	Scenic Rim	Queensland
Age Distribution						
0-14 years	20.1%	18.9%	19.4%	15.7%	17.6%	18.7%
15-24 years	11.2%	10.5%	13.0%	1.9%	10.1%	12.4%
25-34 years	8.3%	8.7%	13.7%	8.2%	9.0%	13.6%
35-44 years	3.6%	12.2%	13.4%	9.4%	11.6%	13.3%
45-54 years	10.7%	14.9%	13.4%	11.9%	14.2%	13.1%
55-64 years	16.0%	14.4%	11.8%	16.4%	14.9%	11.9%
65+ years	26.0%	20.2%	15.3%	36.5%	22.6%	17.0%
Average age (years)	41.5	41.8	38.2	50.9	43.3	39.3
Household size	2.4	2.6	2.6	2.4	2.8	2.8
Household Finances						
% of households fully owning home	50.7%	34.0%	27.4%	45.5%	38.3%	29.1%
% of households purchasing home	33.3%	33.3%	31.4%	31.8%	36.7%	34.4%
% of households renting	24.6%	22.8%	32.2%	16.7%	21.2%	33.1%
Average weekly household income	\$1,250	\$1,530	\$1,735	\$1,289	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,300	\$1,725	\$1,820	\$991	\$1,838	\$1,911
Average weekly rent payment	\$212	\$287	\$334	\$228	\$337	\$379
Average housing costs (as a % of income)	12.2%	12.9%	13.8%	8.6%	13.1%	14.2%

	2016			2021		
	Rathdowney	Scenic Rim	Queensland	Rathdowney	Scenic Rim	Queensland
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	80.3%	75.3%	74.7%	76.8%	61.6%	59.9%
Medium (3 and 4 People)	19.7%	20.8%	21.8%	15.9%	27.9%	30.5%
Large (>4 Persons)	0.0%	3.9%	3.5%	7.2%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	21.2%	17.9%	22.7%	23.9%	16.8%	22.5%
Medium (3 and 4 Bedroom)	74.2%	74.4%	70.1%	67.6%	73.9%	69.5%
Large (>4 Bedrooms)	4.5%	7.6%	7.1%	8.5%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	3.8	4.2	3.3	3.2	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.13 Roadvale

Roadvale comprises a single SA1 immediately north of Boonah. In 2021, there were an estimated 530 persons in Roadvale, residing in 175 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021 Censuses, the incidence of persons aged 0 to 14 years decreased by 2.1% points from 18.7% of the population in 2016 to 16.6% of the population in 2021. The most significant shift was within the 65 years and older cohort, whereby the cohort increased by 4.7% points over the period;
- + The average age of residents within Roadvale increased significantly between the last two Censuses, from 40 years in 2016 to 43.5 years in 2021. This was larger than the increases observed within the benchmarked areas;
- + The average household size also increased within Roadvale from 2.6 residents per household in 2016 to 3.0 residents per household in 2021. The average household size within Scenic Rim and Queensland increased by 0.2 residents per household over the period, from 2.6 residents per household in 2016 to 2.8 residents per household in 2021;
- + The largest shift in household ownership within Roadvale was households with a mortgage, whereby the proportion of households increased from 30.7% of households in 2016 to 39.1% of household in 2021. The proportion of households with a mortgage also increased over the period within Scenic Rim LGA and Queensland, but to a lesser extent than Roadvale;
- + In Roadvale, housing costs as a proportion of household income decreased from 9.1% in 2016 to 9.0% in 2021; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in Roadvale was higher than the number of small dwellings (studio to two bedrooms) in 2016 and 2021, with a ratio of 4.2 in 2016, and 3.6 in 2021. This ratio is in line with the disparity in the broader Scenic Rim LGA.

Table 2-15 below details the socio-economic characteristics of Rathdowney benchmarked to Scenic Rim LGA and Queensland as of the 2011 and 2016 Censuses.

Table 2-15 Socio-Economic Characteristics – Roadvale, Scenic Rim and Queensland, 2016 and 2021

	2016			2021		
	Roadvale	Scenic Rim	Queensland	Roadvale	Scenic Rim	Queensland
Age Distribution						
0-14 years	18.7%	18.9%	19.4%	16.6%	17.6%	18.7%
15-24 years	11.5%	10.5%	13.0%	12.7%	10.1%	12.4%
25-34 years	7.8%	8.7%	13.7%	6.5%	9.0%	13.6%
35-44 years	9.5%	12.2%	13.4%	12.5%	11.6%	13.3%
45-54 years	14.0%	14.9%	13.4%	14.0%	14.2%	13.1%
55-64 years	16.5%	14.4%	11.8%	14.2%	14.9%	11.9%
65+ years	18.7%	20.2%	15.3%	23.4%	22.6%	17.0%
Average age (years)	40	41.8	38.2	43.5	43.3	39.3
Household size	2.6	2.6	2.6	3.0	2.8	2.8
Household Finances						
% of households fully owning home	41.3%	34.0%	27.4%	48.0%	38.3%	29.1%
% of households purchasing home	30.7%	33.3%	31.4%	39.1%	36.7%	34.4%
% of households renting	13.2%	22.8%	32.2%	8.4%	21.2%	33.1%
Average weekly household income	\$1,463	\$1,530	\$1,735	\$2,048	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,507	\$1,725	\$1,820	\$1,722	\$1,838	\$1,911
Average weekly rent payment	\$200	\$287	\$334	\$335	\$337	\$379
Average housing costs (as a % of income)	9.1%	12.9%	13.8%	9.0%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	77.4%	75.3%	74.7%	56.7%	61.6%	59.9%
Medium (3 and 4 People)	18.5%	20.8%	21.8%	28.9%	27.9%	30.5%
Large (>4 Persons)	4.2%	3.9%	3.5%	14.4%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	18.3%	17.9%	22.7%	16.0%	16.8%	22.5%
Medium (3 and 4 Bedroom)	74.3%	74.4%	70.1%	73.4%	73.9%	69.5%
Large (>4 Bedrooms)	7.4%	7.6%	7.1%	10.6%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	4.2	4.2	3.3	3.6	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.14 Tamborine

Tamborine comprises five SA1s to the north of Tamborine Mountain. In 2021, there were an estimated 2,252 persons in Tamborine, residing in 657 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021 the most significant shift in the composition of Tamborine resident ages was within the 55 to 64 year cohort. This age cohort increased by 1.4% points over the period, from 13.6% in 2016, to 15.0% in 2021. This is in line with trends observed within Scenic Rim LGA and Queensland;
- + As of 2021, the average age of residents in Tamborine (39.3 years) was lower than Scenic Rim LGA (43.3 years), but on-par with Queensland levels (39.3 years). The average household size was higher in Tamborine (3.4 persons per household) than the benchmark areas;
- + Between 2016 and 2021, the incidence of households renting decreased significantly in Tamborine (from 11.0% in 2016 to 6.1% in 2021). On the other hand, the incidence of households renting within Scenic Rim LGA and Queensland increased across the period;
- + As of the 2016 and 2021 Censuses, the average weekly household income within Tamborine was higher than both the benchmarked areas. Similarly, the average monthly housing loan repayments, and weekly rent payments was higher within Tamborine than both Scenic Rim and Queensland. As of a result, housing costs as a proportion of household income was higher within Tamborine than both Scenic Rim and Queensland as of both the 2011 and 2016 Censuses; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in the Study Area was higher than the number of small dwellings (studio to two bedrooms) in 2016 with a ratio of 6.2, decreasing to 5.4 in 2021.

Table 2-16 below details the socio-economic characteristics of Tamborine, Scenic Rim and Queensland as of 2016 and 2021.

Table 2-16 Socio-Economic Profile – Tamborine, Scenic Rim LGA and Queensland, 2016 and 2021

	2016			2021		
	Tamborine	Scenic Rim	Queensland	Tamborine	Scenic Rim	Queensland
Age Distribution						
0-14 years	18.5%	18.9%	19.4%	19.7%	17.6%	18.7%
15-24 years	11.5%	10.5%	13.0%	12.3%	10.1%	12.4%
25-34 years	9.3%	8.7%	13.7%	8.9%	9.0%	13.6%
35-44 years	16.2%	12.2%	13.4%	13.5%	11.6%	13.3%
45-54 years	18.9%	14.9%	13.4%	16.4%	14.2%	13.1%
55-64 years	13.6%	14.4%	11.8%	15.0%	14.9%	11.9%
65+ years	13.2%	20.2%	15.3%	14.2%	22.6%	17.0%
Average age (years)	39.4	41.8	38.2	39.3	43.3	39.3
Household size	3.0	2.6	2.6	3.4	2.8	2.8
Household Finances						
% of households fully owning home	22.2%	34.0%	27.4%	27.6%	38.3%	29.1%
% of households purchasing home	55.9%	33.3%	31.4%	64.4%	36.7%	34.4%
% of households renting	11.0%	22.8%	32.2%	6.1%	21.2%	33.1%
Average weekly household income	\$2,013	\$1,530	\$1,735	\$2,564	\$1,737	\$1,952
Average monthly housing loan repayment	\$2,156	\$1,725	\$1,820	\$2,436	\$1,838	\$1,911
Average weekly rent payment	\$442	\$287	\$334	\$478	\$337	\$379
Average housing costs (as a % of income)	16.2%	12.9%	13.8%	15.2%	13.1%	14.2%

	2016			2021		
	Tamborine	Scenic Rim	Queensland	Tamborine	Scenic Rim	Queensland
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	67.7%	75.3%	74.7%	41.1%	61.6%	59.9%
Medium (3 and 4 People)	28.2%	20.8%	21.8%	41.4%	27.9%	30.5%
Large (>4 Persons)	4.1%	3.9%	3.5%	17.5%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	10.8%	17.9%	22.7%	7.6%	16.8%	22.5%
Medium (3 and 4 Bedroom)	72.8%	74.4%	70.1%	71.2%	73.9%	69.5%
Large (>4 Bedrooms)	16.4%	7.6%	7.1%	21.1%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	6.2	4.2	3.3	5.4	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.15 Tamborine Mountain

Tamborine Mountain comprises eighteen SAIs. In 2021, there were an estimated 8,446 persons in Tamborine Mountain, residing in 3,190 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021 the most significant shift in Tamborine Mountain was within the incidence of persons aged 65 years and over. This age cohort increased by 2.3% points over the period, from 24.3% in 2016, to 26.6% in 2021. This is in line with trends observed within Scenic Rim LGA and Queensland;
- + The average age of residents in Tamborine Mountain increased from 44.3 years in 2016 to 46.0 years in 2021. As of 2021, the average age of residents within Tamborine Mountain was significantly higher than Scenic Rim LGA (43.3 years) and Queensland (39.3 years);
- + The proportion of fully owned households increased significantly across the period, from 36.7% of households in 2016 to 44.1% of households in 2021. This increase was larger than the increases observed within the benchmarked areas;
- + Average weekly household income within Tamborine Mountain increased from \$1,517 in 2016 to \$1,924 in 2021. Across the same period, average weekly household income within Scenic Rim and Queensland increased by \$207 and \$217 respectively;
- + Average monthly mortgage repayments within Tamborine Mountain increased by a larger amount than the benchmarked areas across the period. Average monthly mortgage repayments increased by \$185 within Tamborine Mountain, by \$113 within Scenic Rim LGA, and by \$91 within Queensland;
- + Notably, housing costs as a proportion of household income fell within Tamborine Mountain from 13.4% in 2016 to 12.3% in 2021; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in Tamborine Mountain was higher than the number of small dwellings (studio to two bedrooms) in 2016 and 2021, having decreased from a ratio of 4.1 to 3.8, respectively between the two Censuses.

Table 2-17 below details the socio-economic characteristics of Tamborine Mountain, Scenic Rim LGA and Queensland as of 2016 and 2021.

Table 2-17 Socio-Economic Profile – Tamborine Mountain, Scenic Rim LGA and Queensland, 2011 and 2016

	2016			2021		
	Tamborine Mountain	Scenic Rim	Queensland	Tamborine Mountain	Scenic Rim	Queensland
Age Distribution						
0-14 years	17.0%	18.9%	19.4%	16.4%	17.6%	18.7%
15-24 years	7.2%	10.5%	13.0%	8.8%	10.1%	12.4%
25-34 years	5.2%	8.7%	13.7%	6.6%	9.0%	13.6%
35-44 years	10.9%	12.2%	13.4%	10.9%	11.6%	13.3%
45-54 years	15.5%	14.9%	13.4%	14.7%	14.2%	13.1%
55-64 years	17.2%	14.4%	11.8%	16.1%	14.9%	11.9%
65+ years	24.3%	20.2%	15.3%	26.6%	22.6%	17.0%
Average age (years)	44.3	41.8	38.2	46.0	43.3	39.3
Household size	2.5	2.6	2.6	2.7	2.8	2.8
Household Finances						
% of households fully owning home	36.7%	34.0%	27.4%	44.1%	38.3%	29.1%
% of households purchasing home	35.8%	33.3%	31.4%	39.4%	36.7%	34.4%
% of households renting	15.8%	22.8%	32.2%	13.8%	21.2%	33.1%
Average weekly household income	\$1,517	\$1,530	\$1,735	\$1,924	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,743	\$1,725	\$1,820	\$1,928	\$1,838	\$1,911
Average weekly rent payment	\$372	\$287	\$334	\$438	\$337	\$379
Average housing costs (as a % of income)	13.4%	12.9%	13.8%	12.3%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	79.0%	75.3%	74.7%	64.0%	61.6%	59.9%
Medium (3 and 4 People)	19.4%	20.8%	21.8%	27.9%	27.9%	30.5%
Large (>4 Persons)	1.7%	3.9%	3.5%	8.1%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)						
Small (Studio to 2 Bedrooms)	19.0%	17.9%	22.7%	16.7%	16.8%	22.5%
Medium (3 and 4 Bedroom)	74.6%	74.4%	70.1%	73.9%	73.9%	69.5%
Large (>4 Bedrooms)	6.4%	7.6%	7.1%	9.3%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	4.1	4.2	3.3	3.8	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.2.16 Warrill View

Warrill View comprises of single SA1, south of Harrisville. . In 2021, there were an estimated 347 persons in Warrill View, residing in 125 dwellings.

The key socio-economic characteristics of this Study Area include:

- + Between 2016 and 2021 Censuses, the incidence of persons aged 65 years and older increased by 3.0% points, from 12.5% in 2016, to 15.5% in 2021. As of 2021, the average age within Warrill View was 41.5 years, slightly lower than Scenic Rim (43.3 years), but higher than Queensland (39.3 years);
- + Unlike the trends observed in Scenic Rim and Queensland, the average household size within Warrill View decreased from 2.9 residents per household in 2016 to 2.8 residents per household in 2021;
- + As of 2021, 41.2% of households within Warrill View were purchased with a mortgage, representing a 9.6% point increase from 2016. On the other hand, the proportion of households being rented within Warrill View decreased significantly across the period, from 17.5% of households in 2016, to 10.8% of households in 2021. Across the same period, the proportion of households being rented within Scenic Rim decreased by only 1.6% points;
- + Between the 2016 and 2021 Census, the average weekly household income within Warrill View increased by \$451, from \$1,545 in 2016 to \$1,996 in 2021. Average weekly household income within Warrill View as of 2021 was higher than Scenic Rim (\$1,737) and Queensland (\$1,952) levels;
- + Average housing costs as a proportion of household income decreased by 0.1% within Warrill View between 2016 and 2021. On the other hand, average housing costs as a proportion of household income increased within both benchmarked areas; and
- + The small household to small dwelling ratio suggests that the number of small households (one to two persons) in Warrill View was larger than the number of small dwellings (studio to two bedrooms) in 2016 (ratio of 6.4) which decreased to a ratio of 3.5 as of the 2021 Census.

Table 2-18 below details the socio-economic characteristics of Warrill View, Scenic Rim and Queensland as of 2016 and 2021.

Table 2-15 Socio-Economic Profile – Warrill View, Scenic Rim LGA and Queensland, 2011 and 2016

	2016			2021		
	Warrill View	Scenic Rim	Queensland	Warrill View	Scenic Rim	Queensland
Age Distribution						
0-14 years	19.0%	18.9%	19.4%	16.9%	17.6%	18.7%
15-24 years	11.0%	10.5%	13.0%	9.9%	10.1%	12.4%
25-34 years	10.7%	8.7%	13.7%	9.5%	9.0%	13.6%
35-44 years	11.9%	12.2%	13.4%	12.7%	11.6%	13.3%
45-54 years	19.3%	14.9%	13.4%	18.3%	14.2%	13.1%
55-64 years	16.2%	14.4%	11.8%	17.3%	14.9%	11.9%
65+ years	12.5%	20.2%	15.3%	15.5%	22.6%	17.0%
Average age (years)	39.6	41.8	38.2	41.5	43.3	39.3
Household size	2.9	2.6	2.6	2.8	2.8	2.8
Household Finances						
% of households fully owning home	41.2%	34.0%	27.4%	44.1%	38.3%	29.1%

	2016			2021		
	Warrill View	Scenic Rim	Queensland	Warrill View	Scenic Rim	Queensland
% of households purchasing home	31.6%	33.3%	31.4%	41.2%	36.7%	34.4%
% of households renting	17.5%	22.8%	32.2%	10.8%	21.2%	33.1%
Average weekly household income	\$1,545	\$1,530	\$1,735	\$1,996	\$1,737	\$1,952
Average monthly housing loan repayment	\$1,284	\$1,725	\$1,820	\$1,451	\$1,838	\$1,911
Average weekly rent payment	\$193	\$287	\$334	\$226	\$337	\$379
Average housing costs (as a % of income)	8.2%	12.9%	13.8%	8.1%	13.1%	14.2%
Household Size (% of Total Dwellings)						
Small (1 to 2 People)	69.4%	75.3%	74.7%	67.6%	61.6%	59.9%
Medium (3 and 4 People)	25.0%	20.8%	21.8%	23.5%	27.9%	30.5%
Large (>4 Persons)	5.6%	3.9%	3.5%	8.8%	10.5%	9.6%
Dwelling Size (% of Total Dwellings)				0.0%	0.0%	0.0%
Small (Studio to 2 Bedrooms)	10.9%	17.9%	22.7%	19.4%	16.8%	22.5%
Medium (3 and 4 Bedroom)	82.2%	74.4%	70.1%	71.8%	73.9%	69.5%
Large (>4 Bedrooms)	6.9%	7.6%	7.1%	8.7%	9.2%	8.0%
Small Household to Small Dwelling Ratio (>1 = more small households than dwellings)	6.4	4.2	3.3	3.5	3.7	2.7

Source: Australian Bureau of Statistics Census of Population and Housing (2022); CDM Smith Scenic Rim Housing Market and Drivers Study (2021)

2.3 Implications for Housing in Scenic Rim

A review of the socio-economic characteristics of the Scenic Rim LGA over the last two Censuses indicated that the LGA has followed a similar trend observed to Queensland, but it is notable that the rate of ageing has occurred at a faster rate in Scenic Rim LGA than Queensland, with the average age of the population increasing from 41.8 years in 2016 to 43.3 years in 2021.

Housing affordability within Scenic Rim LGA has marginally worsened between 2016 and 2021 (with a higher proportion of household income committed to housing costs), but the region remains affordable relative to Queensland. The areas in which the highest proportion of household income was committed to housing costs in 2021 were Tamborine, Canungra and Beaudesert, with Canungra the only study area to record an increase in the proportion of household income committed to housing costs between the 2016 and 2021 Censuses.

In areas where housing costs are a concern, there could be need for policy intervention from local governments to stabilise housing costs (e.g. through the provision of additional residential land supply). However, the socio-economic profile indicates this is not a significant concern for Scenic Rim Regional Council or the study areas which are the subject of this Housing Needs Assessment.

A key finding of the socio-economic profiles is that the average household size in most study areas increased between the 2016 and 2021 Censuses, indicating that population growth was accommodated to a greater extent in the existing dwelling stock than originally anticipated.

The household to small dwelling ratio indicates that there is an imbalance across the LGA between small households (1 to 2 people) and small dwellings (studio to two bedrooms). This imbalance

suggests that there is an undersupply of small dwellings in the LGA relative to the number of small households. This ratio was 3.7 in Scenic Rim LGA in 2021, lower than in 2016 (4.2), suggesting that the imbalance has improved, however this still requires consideration for the future planning of housing in the Scenic Rim region.

Table 2-19 highlights the key findings from the socio-economic analysis at the Study Area level in relation to average resident age, household income versus housing costs and small household to small dwelling ratios.

Table 2-19 Key Findings from Socio-Economic Profiles – Study Areas

Study Area	Key Findings
Aratula	<ul style="list-style-type: none"> • Average age of residents similar to Scenic Rim as of 2021 Census, and increased significantly between 2016 and 2021 Censuses; • Proportion of household income spent on housing costs lower than Scenic Rim LGA and fell between the 2016 and 2021 Censuses, suggesting that housing affordability is not a major concern in this area; and • Significant decline in the small household to small dwelling ratio between 2016 and 2021, indicating an improvement in the undersupply of small dwellings in Aratula.
Beaudesert & Gleneagle	<ul style="list-style-type: none"> • Average age of residents similar to Scenic Rim as of 2021 Census, and increased significantly between 2016 and 2021 Censuses; • Proportion of household income spent on housing costs higher than Scenic Rim LGA but fell between the 2016 and 2021 Censuses, suggesting that housing affordability in this area is stabilising; and • Similar imbalance between small households and small dwellings compared to the broader LGA, suggesting a small undersupply of small dwellings.
Beechmont	<ul style="list-style-type: none"> • Average age of residents significantly higher than Scenic Rim as of 2021 Census and increased significantly between 2016 and 2021 Censuses. This is suggestive of a need to ensure that provision of compact housing for an ageing population is considered; • Proportion of household income spent on housing costs higher than Scenic Rim LGA but fell between the 2016 and 2021 Censuses, suggesting that housing affordability in this area is stabilising; and • Significant decline in the small household to small dwelling ratio between 2016 and 2021, indicating an improvement in the undersupply of small dwellings in Beechmont.
Boonah	<ul style="list-style-type: none"> • Average age of residents significantly higher than Scenic Rim as of 2021 Census and increased significantly between 2016 and 2021 Censuses. This is suggestive of a need to ensure that provision of compact housing for an ageing population is considered; • Proportion of household income spent on housing costs lower than Scenic Rim LGA and fell between the 2016 and 2021 Censuses, suggesting that housing affordability is not a major concern in this area; and • Small household to small dwelling ratio in Boonah lower than Scenic Rim, suggesting that the undersupply of small dwellings is not a major concern in Boonah.
Bromelton	<ul style="list-style-type: none"> • Average age of residents similar to Scenic Rim as of 2021 Census, and increased significantly between 2016 and 2021 Censuses; • Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and • Significant decline in the small household to small dwelling ratio between 2016 and 2021, indicating an improvement in the undersupply of small dwellings in Bromelton.
Canungra	<ul style="list-style-type: none"> • Average age of residents in Canungra significantly lower than Scenic Rim;

Study Area	Key Findings
	<ul style="list-style-type: none"> Proportion of household income spent on housing costs higher than Scenic Rim LGA and increased between the 2016 and 2021 Censuses, suggesting that whilst housing affordability has worsened it is still not a major concern in this area; and Whilst the small household to small dwelling ratio has improved between 2016 and 2021, it remains above the Scenic Rim average, suggestive of an undersupply of small dwellings.
Harrisville	<ul style="list-style-type: none"> Lower average age in Harrisville relative to Scenic Rim as of 2021 Census; Significant decline in housing costs (as a % of household income) between the 2016 and 2021 Censuses, indicating that housing affordability is not a major concern in this area; Whilst the small household to small dwelling ratio has improved between 2016 and 2021, it remains above the Scenic Rim average, suggestive of an undersupply of small dwellings.
Kalbar	<ul style="list-style-type: none"> Lower average age in Kalbar relative to Scenic Rim as of 2021 Census; Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and Whilst the small household to small dwelling ratio has improved between 2016 and 2021, it remains above the Scenic Rim average, suggestive of an undersupply of small dwellings.
Kooralbyn	<ul style="list-style-type: none"> Significant increase in the average age of residents in Kooralbyn between 2016 and 2021 Census, indicating an ageing population who will have differing housing requirements in the future; Proportion of household income spent on housing costs higher than Scenic Rim LGA but fell between the 2016 and 2021 Censuses, suggesting that housing affordability in this area is stabilising; and Small household to small dwelling ratio in Kooralbyn lower than Scenic Rim, suggesting that the undersupply of small dwellings is not a major concern in Kooralbyn.
Mount Alford	<ul style="list-style-type: none"> Significant increase in the average age of residents in Mount Alford between 2016 and 2021 Census, indicating an ageing population who will have differing housing requirements in the future; Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and Small household to small dwelling ratio in Mount Alford lower than Scenic Rim, suggesting that the undersupply of small dwellings is not a major concern in Mount Alford.
Peak Crossing	<ul style="list-style-type: none"> Lower average age in Peak Crossing relative to Scenic Rim as of 2021 Census; Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and Whilst the small household to small dwelling ratio has improved between 2016 and 2021, it remains above the Scenic Rim average, suggestive of an undersupply of small dwellings.
Rathdowney	<ul style="list-style-type: none"> Significant increase in the average age of residents in Rathdowney between 2016 and 2021 Census, indicating an ageing population who will have differing housing requirements in the future; Proportion of household income spent on housing costs significantly lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and Small household to small dwelling ratio in Rathdowney lower than Scenic Rim, suggesting that the undersupply of small dwellings is not a major concern in Rathdowney.

Study Area	Key Findings
Roadvale	<ul style="list-style-type: none"> • Average age of residents similar to Scenic Rim as of 2021 Census, and increased significantly between 2016 and 2021 Censuses; • Proportion of household income spent on housing costs significantly lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and • Similar imbalance between small households and small dwellings compared to the broader LGA, suggesting a small undersupply of small dwellings.
Tamborine	<ul style="list-style-type: none"> • Lower average age in Tamborine relative to Scenic Rim as of 2021 Census; • Proportion of household income spent on housing costs higher than Scenic Rim LGA but fell between the 2016 and 2021 Censuses, suggesting that housing affordability in this area is stabilising; and • Whilst the small household to small dwelling ratio has improved between 2016 and 2021, it remains above the Scenic Rim average, suggestive of an undersupply of small dwellings.
Tamborine Mountain	<ul style="list-style-type: none"> • Average age of residents significantly higher than Scenic Rim as of 2021 Census and increased significantly between 2016 and 2021 Censuses. This is suggestive of a need to ensure that provision of compact housing for an ageing population is considered; • Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and • Similar imbalance between small households and small dwellings compared to the broader LGA, suggesting a small undersupply of small dwellings.
Warrill View	<ul style="list-style-type: none"> • Lower average age in Warrill View relative to Scenic Rim as of 2021 Census; • Proportion of household income spent on housing costs lower than Scenic Rim LGA, suggesting that housing affordability is not a major concern in this area; and • Small household to small dwelling ratio in Warrill View lower than Scenic Rim, suggesting that the undersupply of small dwellings is not a major concern in Warrill View.

3 Residential Building Approvals

The purpose of this chapter is to provide an overview of residential building approval trends within Scenic Rim LGA and its component SA2s from 2011-12 onwards for both detached and attached dwellings, based on data published by the Australian Bureau of Statistics.

3.1 Detached Dwelling Approvals

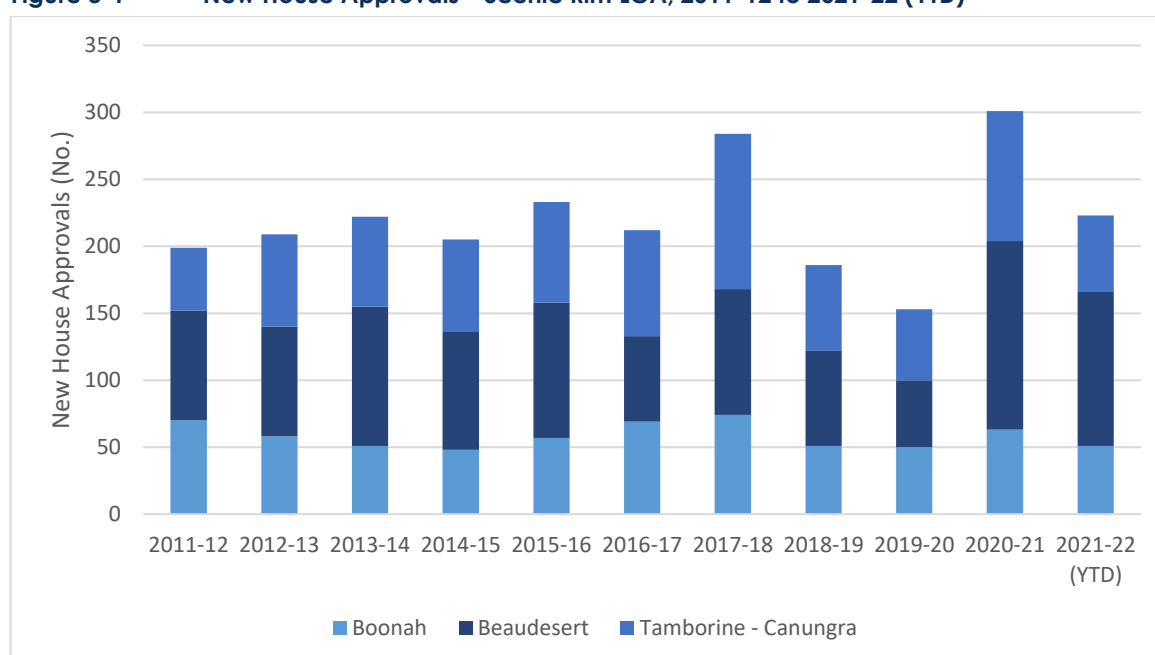
The average number of detached dwelling approvals in Scenic Rim LGA was 223 dwellings per annum in the 2011-12 to 2021-22 (YTD), with detached dwelling approvals reaching a peak of 301 approvals in 2020-21. The average number of detached dwelling approvals by SA2 was comprised as follows:

- + Boonah SA2: 58 approvals;
- + Beaudesert SA2: 90 approvals; and
- + Tamborine – Canungra SA2: 72 approvals.

In 2021-22 (YTD)², the number of detached dwelling approvals is broadly in line with the long term average (221 detached dwellings approved). The number of detached dwelling approvals in Beaudesert SA2 in 2021-22 YTD has already exceeded the long term average.

Figure 3-1 illustrates the number of new house approvals per year in Scenic Rim LGA between 2011-12 and 2021-22 (YTD).

Figure 3-1 New House Approvals – Scenic Rim LGA, 2011-12 to 2021-22 (YTD)



Source: ABS (2022), Building approvals, Australia, Cat. No. 8731.0, Australian Bureau of Statistics, Canberra

² At the time the report was compiled, building approvals data for 2021-22 was available to the end of April 2022.

3.2 Attached Dwelling Approvals

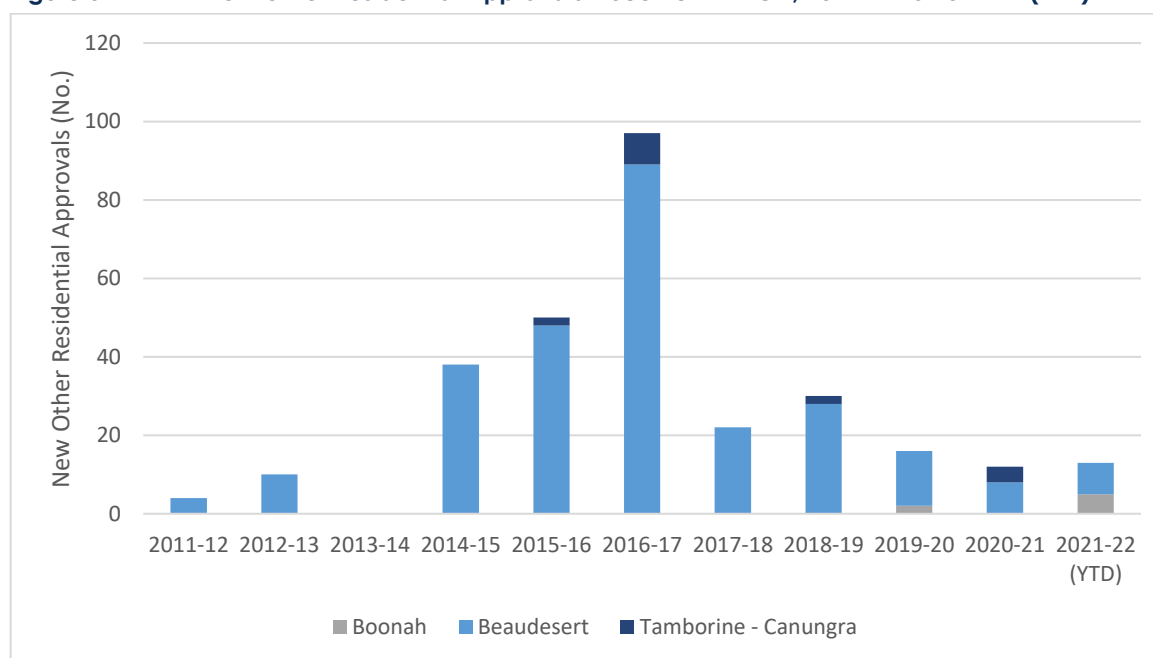
Other new residential approvals comprise attached dwellings, including semi-detached, row or terrace houses, one, two or more story townhouses or apartments. Between 2011-12 and 2021-22 (YTD), there was an average of 29 attached dwelling approvals per annum in Scenic Rim LGA, reaching a peak of 97 dwelling approvals in 2016-17. The average number of attached dwelling approvals by SA2 was as follows:

- + Boonah SA2: 1 approval;
- + Beaudesert SA2: 24 approvals; and
- + Tamborine – Canungra SA2: 1 approval.

The number of attached dwelling approvals in Scenic Rim was significantly higher in 2016-17 than all other years analysed. In 2021-22 (YTD) there have been 13 attached dwelling approvals, comprising 8 attached dwelling approvals in Beaudesert SA2 and 5 attached dwelling approvals in Boonah SA2.

Figure 3-2 illustrates new other residential approvals per year in Scenic Rim LGA between 2011-12 and 2021-22 (YTD).

Figure 3-2 New Other Residential Approvals – Scenic Rim LGA, 2011-12 to 2021-22 (YTD)



Source: ABS (2022), Building approvals, Australia, Cat. No. 8731.0, Australian Bureau of Statistics, Canberra

Table 3-1 details the number of detached and attached dwelling approvals within Scenic Rim LGA for the period 2011-12 to 2021-22 (YTD).

Table 3-1 Dwelling Approvals – Scenic Rim LGA, 2011-12 to 2021-22

	Number of Approvals		
	New Houses	New Other Residential	Total Approvals
Boonah SA2			
2011-12	70	0	70
2012-13	58	0	58
2013-14	51	0	51
2014-15	48	0	48

	Number of Approvals		
	New Houses	New Other Residential	Total Approvals
2015-16	57	0	57
2016-17	69	0	69
2017-18	74	0	74
2018-19	51	0	51
2019-20	50	2	52
2020-21	63	0	63
2021-22 (YTD)	51	5	56
Average	58	1	59
Beaudesert SA2			
2011-12	82	4	86
2012-13	82	10	92
2013-14	104	0	104
2014-15	88	38	126
2015-16	101	48	149
2016-17	64	89	153
2017-18	94	22	116
2018-19	71	28	99
2019-20	50	14	64
2020-21	141	8	149
2021-22	115	8	123
Average (YTD)	90	24	115
Tamborine - Canungra SA2			
2011-12	47	0	47
2012-13	69	0	69
2013-14	67	0	67
2014-15	69	0	69
2015-16	75	2	77
2016-17	79	8	87
2017-18	116	0	116
2018-19	64	2	66
2019-20	53	0	53
2020-21	97	4	101
2021-22 (YTD)	57	0	57
Average	72	1	74
Scenic Rim LGA			
2011-12	199	4	203
2012-13	209	10	219
2013-14	222	0	222
2014-15	205	38	243
2015-16	233	50	283
2016-17	212	97	309
2017-18	284	22	306
2018-19	186	30	216
2019-20	153	16	169
2020-21	301	12	313

	Number of Approvals		
	New Houses	New Other Residential	Total Approvals
2021-22 (YTD)	223	13	236
Average	221	27	247

Source: ABS (2022), Building approvals, Australia, Cat. No. 8731.0, Australian Bureau of Statistics, Canberra

4 Property Market Overview

This section of the report provides an overview of the vacant residential land market within Scenic Rim LGA and Study Areas to understand the composition of residential land demand and its implications for housing demand. The assessment considers the volume, value, and median sale price for residential land.

4.1 Volume of Sales

Over the past eleven years (2010-2021) the number of vacant residential land sales in Scenic Rim LGA was 2,402 in total, averaging 200 sales per annum. Vacant residential land sales in Scenic Rim LGA were lowest in 2019 at 112 sales, before peaking at 320 sales in the latest year (2021). The Study Areas with the largest volume of sales were as follows:

- + **Beaudesert and Gleneagle:** a total of 675 vacant residential land sales, with 43 sales in 2010, and peaking at 139 sales in 2021;
- + **Tamborine Mountain:** a total of 263 vacant residential land sales, with 16 sales in 2010, peaking in 2016 at 31 sales before slowly decreasing to 22 sales in 2021; and
- + **Kooralbyn:** a total of 238 vacant residential land sales, with 25 sales in 2010, and peaking at 48 sales in 2021.

Vacant residential land sales were lowest in the Rathdowney Study Area with only ten sales recorded over the period.

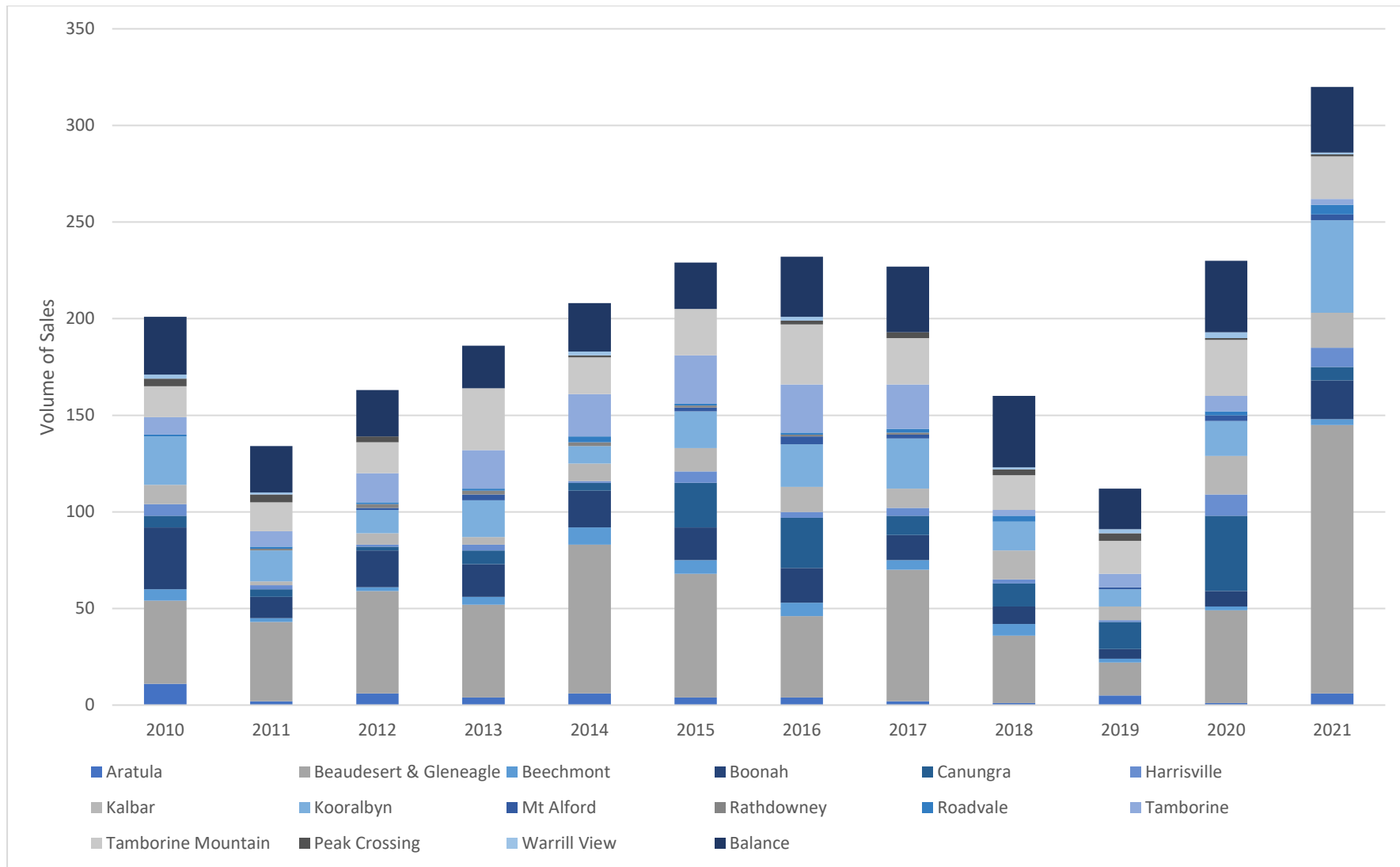
Table 4-1 and Figure 4-1 below summarises the volume of vacant residential zoned land sales within Scenic Rim LGA Study Area between 2010 and 2021.

Table 4-1 Volume of Vacant Residential Land Sales – Study Areas and Scenic Rim LGA, 2010 to 2021

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
Aratula	11	2	6	4	6	4	4	2	1	5	1	6	52
Beaudesert & Gleneagle	43	41	53	48	77	64	42	68	35	17	48	139	675
Beechmont	6	2	2	4	9	7	7	5	6	2	2	3	55
Boonah	32	11	19	17	19	17	18	13	9	5	8	20	188
Canungra	6	4	2	7	4	23	26	10	12	14	39	7	154
Harrisville	6	2	1	3	1	6	3	4	2	1	11	10	50
Kalbar	10	2	6	4	9	12	13	10	15	7	20	18	126
Kooralbyn	25	16	12	19	9	19	22	26	15	9	18	48	238
Mt Alford	0	0	1	3	0	2	4	2	0	1	3	3	19
Rathdowney	0	1	2	2	2	1	1	1	0	0	0	0	10
Roadvale	1	1	1	1	3	1	1	2	3	0	2	5	21
Tamborine	9	8	15	20	22	25	25	23	3	7	8	3	168
Tamborine Mountain	16	15	16	32	19	24	31	24	18	17	29	22	263
Peak Crossing	4	4	3	0	1	0	2	3	3	4	1	1	26
Warrill View	2	1	0	0	2	0	2	0	1	2	3	1	14
Balance	30	24	24	22	25	24	31	34	37	21	37	34	343
Scenic Rim	201	134	163	186	208	229	232	227	160	112	230	320	2,402

Source: PriceFinder (2022)

Figure 4-1 Volume of Vacant Residential Land Sales – Study Areas and Scenic Rim LGA, 2010 to 2021



Source: PriceFinder (2022)

4.1.1 Proportion of Vacant Land Sales & Proportion of Population Growth

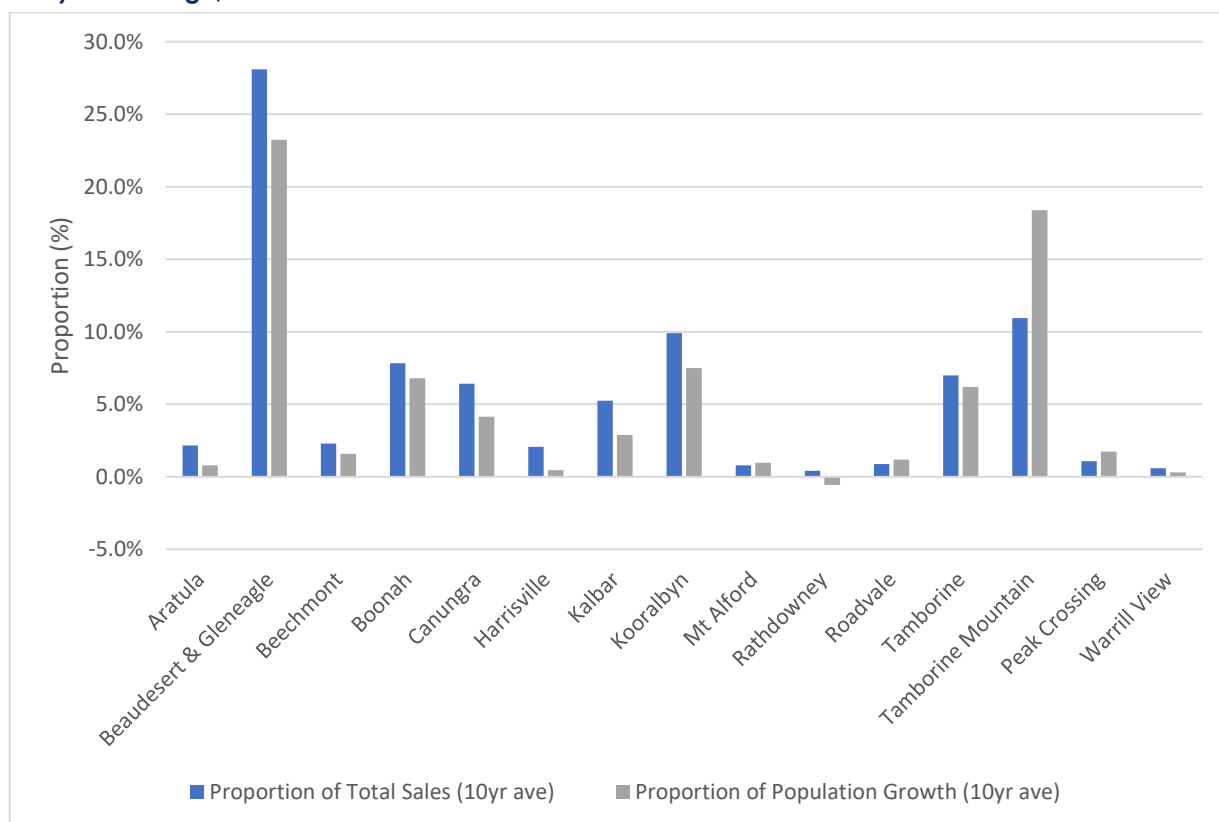
The ten-year average proportion of vacant land sales attributable to each Study Area, compared to the proportion of population growth within each Study Area (ten-year average) provides insight into the relationship between land sales and population growth in Scenic Rim LGA. Based on Table 2-1, the ten-year average proportion of Scenic Rim LGA population growth was also highest in Beaudesert and Gleneagle, Tamborine Mountain and Kooralbyn Study Areas.

The data presented in Figure 5-1 above suggests that the proportion of Scenic Rim LGA vacant land sales has historically been highest in the following areas:

- + Beaudesert and Gleneagle Study Area account for over a quarter of all vacant land sales in Scenic Rim LGA on average between 2011 and 2021;
- + On average the Tamborine Mountain Study Area represented 10.9% of total vacant land sales in the LGA over the analysis period; and
- + The Kooralbyn Study Area accounted for an average of 9.9% of all Scenic Rim LGA vacant land sales between 2011 and 2021.

This comparison outlines that in those Study Areas with a high incidence of population growth, there is also a high incidence of vacant land sales. Similarly, areas of low population growth have typically recorded few vacant land sales, as illustrated in Figure 4-2 below.

Figure 4-2 Proportion of Vacant Residential Land Sales and Proportion of Population growth – Study Areas, ten-year average, 2011 to 2021



Source: PriceFinder (2022) and Derived from Table 2-1

4.2 Value of Sales

Between 2010 and 2021, the average value of vacant residential land sales within Scenic Rim LGA was \$52.2 million per annum. The total value of vacant land sales was highest in 2021 at \$90.3 million and lowest in 2011 at \$33.9 million. Over this period, the average annual value of vacant residential land sales was highest in Beaudesert and Gleneagle (\$15.1 million), Tamborine Mountain (\$7.7 million), and Tamborine (\$4.3 million).

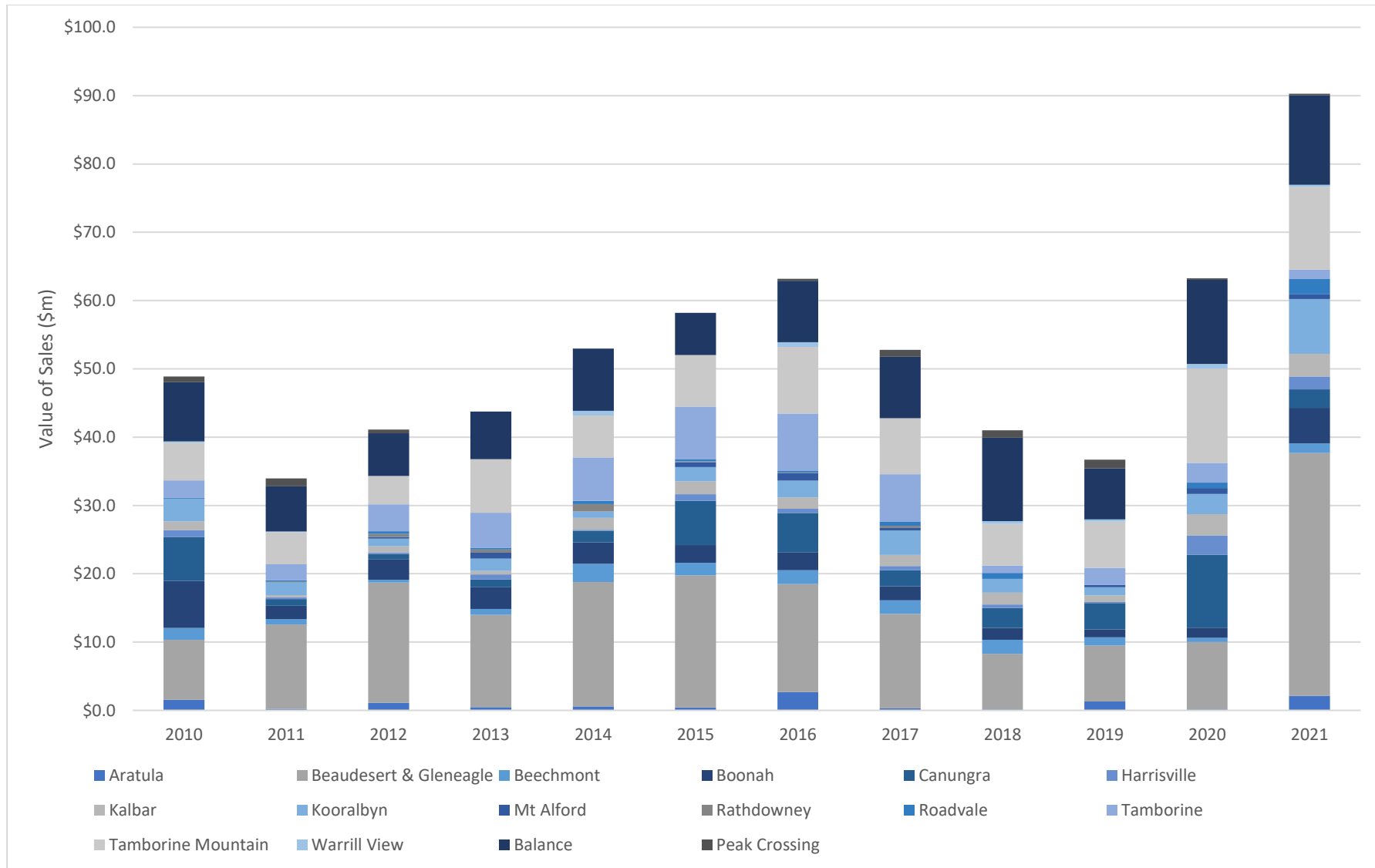
Table 4-2 and Figure 4-3 below summarises the value of vacant residential zoned land sales within Scenic Rim LGA Study Areas between 2010 and 2021.

Table 4-2 Value of Vacant Residential Land Sales (\$m)– Study Areas and Scenic Rim LGA, 2010 to 2021

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
Aratula	\$1.6	\$0.2	\$1.1	\$0.5	\$0.6	\$0.4	\$2.7	\$0.3	\$0.1	\$1.3	\$0.1	\$2.1	\$11.0
Beaudesert & Gleneagle	\$8.8	\$12.4	\$17.6	\$13.5	\$18.2	\$19.3	\$15.8	\$13.8	\$8.1	\$8.2	\$9.9	\$35.5	\$181.2
Beechmont	\$1.7	\$0.8	\$0.4	\$0.9	\$2.7	\$1.9	\$2.0	\$2.0	\$2.1	\$1.2	\$0.6	\$1.4	\$17.6
Boonah	\$6.9	\$1.9	\$3.0	\$3.2	\$3.1	\$2.6	\$2.7	\$2.1	\$1.7	\$1.2	\$1.5	\$5.2	\$35.1
Canungra	\$6.4	\$1.0	\$0.8	\$1.2	\$1.7	\$6.5	\$5.7	\$2.3	\$2.9	\$3.9	\$10.7	\$2.7	\$45.8
Harrisville	\$1.0	\$0.3	\$0.2	\$0.7	\$0.2	\$1.0	\$0.6	\$0.6	\$0.5	\$0.2	\$2.8	\$1.9	\$9.9
Kalbar	\$1.3	\$0.3	\$0.9	\$0.5	\$1.7	\$1.9	\$1.7	\$1.6	\$1.7	\$1.0	\$3.1	\$3.3	\$19.1
Kooralbyn	\$3.3	\$1.9	\$1.1	\$1.8	\$0.9	\$2.1	\$2.5	\$3.6	\$2.0	\$1.2	\$3.0	\$8.0	\$31.4
Mt Alford	\$0.0	\$0.0	\$0.3	\$0.9	\$0.0	\$0.7	\$1.1	\$0.4	\$0.0	\$0.3	\$0.9	\$0.7	\$5.2
Rathdowney	\$0.0	\$0.1	\$0.4	\$0.5	\$1.1	\$0.1	\$0.1	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$2.7
Roadvale	\$0.1	\$0.2	\$0.4	\$0.2	\$0.5	\$0.3	\$0.2	\$0.6	\$0.9	\$0.0	\$0.8	\$2.3	\$6.4
Tamborine	\$2.6	\$2.4	\$3.9	\$5.2	\$6.3	\$7.7	\$8.4	\$7.0	\$1.1	\$2.4	\$2.9	\$1.3	\$51.3
Tamborine Mountain	\$5.5	\$4.7	\$4.1	\$7.8	\$6.1	\$7.5	\$9.8	\$8.2	\$6.1	\$6.8	\$13.8	\$12.1	\$92.7
Peak Crossing	\$0.8	\$1.1	\$0.6	\$0.0	\$0.1	\$0.0	\$0.3	\$1.0	\$1.1	\$1.3	\$0.2	\$0.2	\$6.6
Warrill View	\$0.2	\$0.1	\$0.0	\$0.0	\$0.7	\$0.0	\$0.7	\$0.0	\$0.4	\$0.4	\$0.7	\$0.3	\$3.4
Balance	\$8.7	\$6.6	\$6.2	\$7.0	\$9.1	\$6.2	\$9.0	\$9.0	\$12.2	\$7.5	\$12.3	\$13.1	\$106.9
Scenic Rim	\$48.9	\$33.9	\$41.1	\$43.7	\$53.0	\$58.2	\$63.2	\$52.8	\$41.0	\$36.7	\$63.3	\$90.3	\$626.1

Source: PriceFinder (2022)

Figure 4-3 Value of Vacant Residential Land Sales – Study Areas and Scenic Rim LGA, 2010 to 2021



Source: PriceFinder (2022)

4.3 Sales by Lot Size

This analysis also assessed vacant residential property sales volumes by lot size category, which have been amalgamated for the 2010 to 2021 period. Of the 2,402 vacant residential land sales, sales were largely concentrated within the 4,000 square metre and 1-hectare (592 sales) and greater than 2-hectare (503 sales) categories. Lots sized between 400 square metres and 600 square metres, and lots sized between 2,000 square metres and 4,000 square metres accounted for the lowest volume of sales in the same period, each recording 90 and 151 land sales, respectively.

The four largest growth areas between 2010 and 2021 were as follows:

- + Beaudesert and Gleneagle: 675 sales with 288 sales being 600sqm-800sqm lots;
- + Tamborine Mountain: 263 sales with 97 sales being 800sqm-1,200sqm lots;
- + Kooralbyn: 238 sales with 193 sales being 4,000sqm-1 hectare lots; and
- + Boonah: 188 sales with 71 sales being 4,000sqm-1 hectare lots.

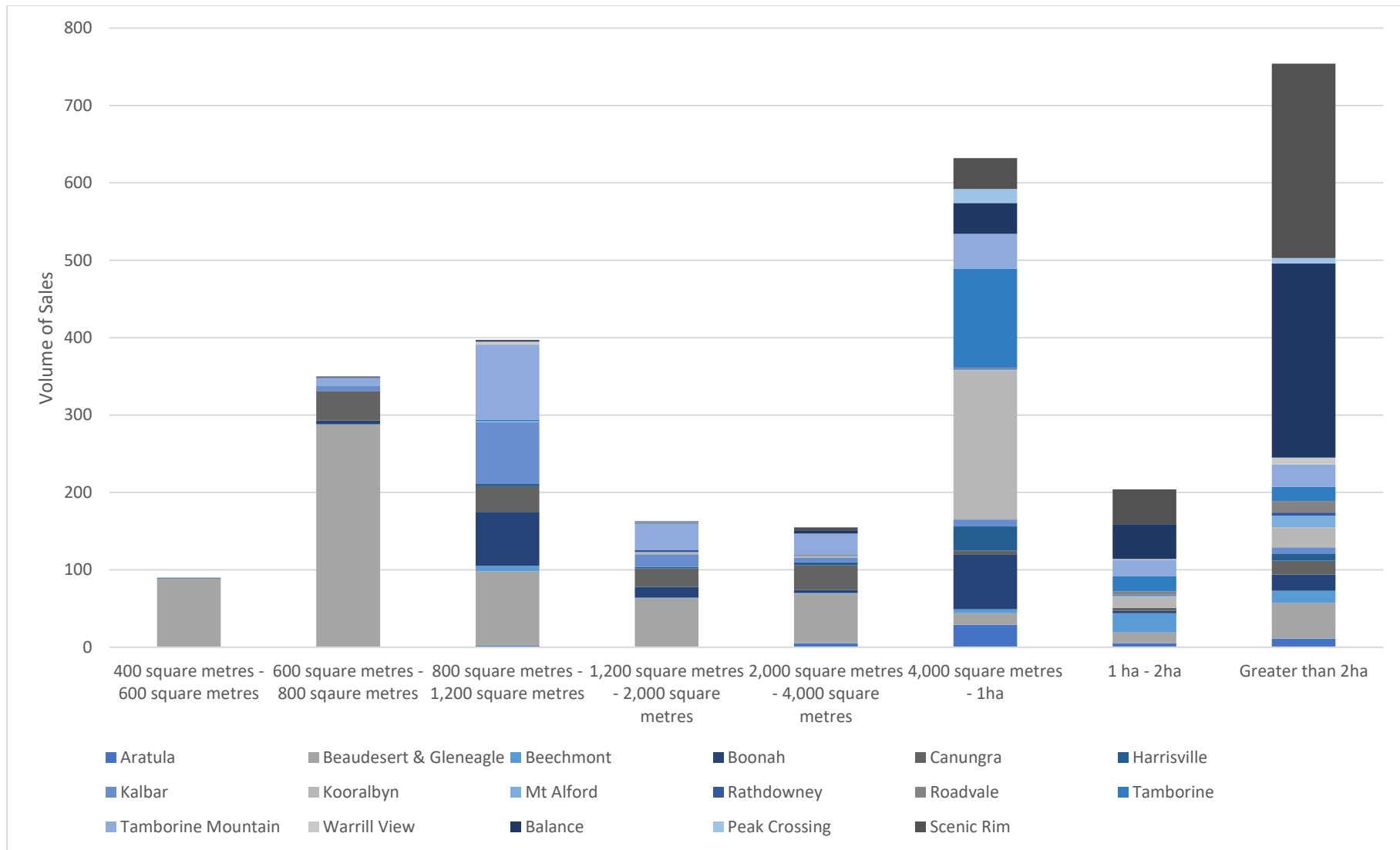
Table 4-3 and Figure 4-4 below report the volume of vacant residential land sales by lot size within Scenic Rim LGA Study Areas between 2010 and 2021.

Table 4-3 Volume of Vacant Residential Land Sales by Lot Size – Scenic Rim LGA and Study Areas, 2010 to 2021

	Aratula	Beaudesert & Gleneagle	Beechmont	Boonah	Canungra	Harrisville	Kailbar	Koorabyn	Mt Alford	Rathdowney	Roadvale	Tamborine	Tamborine Mountain	Peak Crossing	Warrill View	Balance	Scenic Rim	
400sqm - 600sqm	0	89	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	90
600sqm - 800sqm	0	288	0	5	38	0	7	0	0	0	0	0	10	0	0	0	1	349
800sqm - 1,200sqm	2	96	7	70	33	3	80	0	1	0	0	2	97	0	4	1	1	396
1,200sqm - 2,000sqm	0	63	1	14	24	2	16	3	0	3	0	0	34	1	0	1	1	162
2,000sqm - 4,000sqm	5	64	1	4	32	4	6	2	0	1	1	0	27	0	0	4	4	151
4,000sqm - 1ha	29	15	5	71	5	31	9	193	1	1	1	128	45	18	0	40	40	592
1ha - 2ha	5	14	25	3	4	0	0	14	2	1	4	20	21	0	1	45	45	159
Greater than 2ha	11	46	16	21	18	9	8	26	15	4	15	18	29	7	9	251	251	503
Total	52	675	55	188	154	50	126	238	19	10	21	168	263	26	14	343	2,402	

Source: PriceFinder (2022)

Figure 4-4 Volume of Vacant Residential Land Sales by Lot Size – Study Areas, 2010 to 2021



Source: PriceFinder (2022)

4.4 Median Sale Price

Between 2010 and 2021, the highest median sale price for vacant residential land in Scenic Rim LGA was \$262,500 in 2019, with the lowest median sale price for vacant residential land sales in Scenic Rim LGA being \$183,700 in 2014. Between 2010 and 2020, the median sale price for vacant residential land in Scenic Rim LGA was \$195,000.

At a Study Area Level, Roadvale recorded the highest median sale price for vacant residential land in 2021 at \$465,000, whilst Kooralbyn recorded the lowest median sale price for vacant residential land at \$120,000.

In terms of growth between 2010 and 2021, the Study Areas that recorded the largest increases in the median sale price for vacant residential land were as follows:

- + Roadvale: from \$95,000 in 2010 to \$465,000 in 2021, an increase of \$370,000; and
- + Tamborine Mountain: from \$232,500 in 2010 to \$451,500 in 2021, an increase of \$219,000.

Meanwhile, the Study Areas that recorded the largest declines in the median sale price of vacant residential land were as follows:

- + Canungra: from \$732,500 in 2010 to \$350,000 in 2021, a decrease of \$383,500; and
- + Beaudesert and Gleneagle: from \$190,000 in 2010 to \$185,000 in 2021, a decrease of \$5,000.

In price per square metre terms, the sale price of vacant residential land was highest in the following areas in 2021:

- + Beaudesert and Gleneagle: \$252 per sqm (between 2010-21, the most common lot size sold was 600sqm-800sqm);
- + Tamborine Mountain: \$149 per sqm (between 2010-21, the most common lot size sold was between 800sqm-1,200sqm);
- + Kalbar: \$115 per sqm (between 2010-21, the most common lot size sold was between 800-1,220sqm) and;
- + Boonah: \$57 per sqm (between 2010-21, the most common lot size sold was between 4,000sqm and 1-hectare).

Table 4-4 denotes the median sale prices for vacant residential land by Study Area within Scenic Rim LGA, whilst Table 4-5 denotes the price per square metre for vacant residential land by Study Area within Scenic Rim LGA.

Table 4-4 Median Sale Price – Vacant Residential Land by Study Area, Scenic Rim LGA, 2010 to 2021

	Aratula	Beaudesert & Gleneagle	Beechmont	Boonah	Canungra	Harristville	Kalbar	Koorralbyn	Mt Alford	Rathdowney	Roadvale	Tamborine	Tamborine Mountain	Peak Crossing	Warrill View	Balance	Scenic Rim
2010	\$122,000	\$190,000	\$301,500	\$183,500	\$732,500	\$165,000	\$119,138	\$121,000	-	-	\$95,000	\$280,000	\$232,500	\$221,00	\$105,000	\$272,500	\$190,000
2011	\$102,250	\$182,205	\$385,000	\$182,500	\$175,000	\$152,500	\$127,500	\$115,000	-	\$100,000	\$208,000	\$300,000	\$269,000	\$231,500	\$106,000	\$262,500	\$199,500
2012	\$132,500	\$179,500	\$205,000	\$157,000	\$388,500	\$220,000	\$124,500	\$85,500	\$270,000	\$217,500	\$400,000	\$260,000	\$185,000	\$200,000	-	\$219,000	\$180,000
2013	\$115,750	\$179,700	\$227,500	\$166,000	\$140,000	\$235,000	\$121,500	\$98,000	\$300,000	\$240,000	\$220,000	\$264,500	\$200,000	-	-	\$250,000	\$183,700
2014	\$82,500	\$179,900	\$247,500	\$178,000	\$487,500	\$160,000	\$125,000	\$105,000	-	\$550,000	\$148,000	\$288,250	\$305,000	\$55,000	\$356,250	\$265,000	\$187,500
2015	\$116,000	\$185,900	\$262,000	\$125,000	\$206,000	\$130,000	\$113,750	\$108,000	\$363,750	\$120,000	\$299,999	\$294,500	\$240,000	-	-	\$255,000	\$193,000
2016	\$268,750	\$189,705	\$305,000	\$133,750	\$218,000	\$185,000	\$128,000	\$107,500	\$297,500	\$90,000	\$199,000	\$308,500	\$310,000	\$135,000	\$342,500	\$304,000	\$218,000
2017	\$137,500	\$190,000	\$249,000	\$158,000	\$232,500	\$162,500	\$136,875	\$125,000	\$177,500	\$332,500	\$277,500	\$312,500	\$257,500	\$275,000	-	\$270,000	\$195,000
2018	\$128,000	\$195,000	\$371,500	\$162,500	\$249,000	\$250,000	\$110,000	\$121,000	-	-	\$310,000	\$350,000	\$307,500	\$330,000	\$370,000	\$315,000	\$222,500
2019	\$217,000	\$185,000	\$597,500	\$220,000	\$270,000	\$155,000	\$136,000	\$130,000	\$349,500	-	-	\$361,500	\$305,000	\$330,000	\$175,500	\$325,000	\$262,500
2020	\$142,000	\$179,500	\$296,250	\$182,000	\$249,000	\$185,000	\$153,750	\$150,000	\$243,500	-	\$400,000	\$362,000	\$377,500	\$244,000	\$285,000	\$320,000	\$234,000
2021	\$245,000	\$185,000	\$330,000	\$212,750	\$350,000	\$185,000	\$187,000	\$150,000	\$190,000	-	\$465,000	\$397,000	\$451,500	\$200,000	\$290,000	\$355,000	\$189,000
Median	\$129,000	\$185,000	\$265,000	\$170,000	\$239,500	\$185,000	\$135,000	\$120,000	\$285,000	\$160,000	\$299,999	\$296,500	\$295,000	\$224,000	\$283,750	\$290,000	\$195,000

Source: PriceFinder (2022)

Table 4-5 Price per Square Metre (\$) – Vacant Residential land by Study Area, Scenic Rim LGA, 2010 to 2021

	Aratula	Beaudesert & Gleneagle	Beechmont	Boonah	Canungra	Harrisville	Kalbar	Koorabyn	Mt Alford	Rathdowney	Roadvale	Tambarine	Tambarine Mountain	Peak Crossing	Warrill View	Balance	Scenic Rim
2010	\$23	\$164	\$27	\$45	\$10	\$44	\$72	\$21	-	-	\$5	\$37	\$195	\$55	\$104	\$9	\$39
2011	\$26	\$106	\$17	\$40	\$253	\$71	\$76	\$18	-	\$78	\$10	\$23	\$125	\$54	\$105	\$3	\$45
2012	\$15	\$226	\$15	\$43	\$23	\$8	\$70	\$18	\$2	\$37	\$2	\$47	\$121	\$50	-	\$12	\$50
2013	\$24	\$102	\$16	\$104	\$179	\$9	\$95	\$17	\$1	\$8	\$10	\$50	\$142	-	-	\$6	\$60
2014	\$20	\$252	\$18	\$48	\$6	\$40	\$26	\$20	-	\$32	\$8	\$70	\$92	\$14	\$1	\$2	\$72
2015	\$31	\$213	\$17	\$96	\$249	\$36	\$86	\$18	\$1	\$59	\$8	\$69	\$134	-	-	\$3	\$68
2016	\$66	\$247	\$16	\$98	\$273	\$46	\$120	\$19	\$3	\$15	\$10	\$51	\$155	\$34	\$8	\$2	\$51
2017	\$19	\$249	\$48	\$43	\$296	\$44	\$118	\$19	\$4	\$0	\$13	\$58	\$187	\$64	-	\$2	\$64
2018	\$32	\$253	\$29	\$99	\$177	\$25	\$125	\$21	-	-	\$3	\$68	\$107	\$13	\$3	\$3	\$55
2019	\$15	\$235	\$26	\$71	\$155	\$39	\$120	\$19	\$2	-	-	\$89	\$153	\$13	\$51	\$3	\$43
2020	\$24	\$273	\$96	\$119	\$120	\$46	\$153	\$22	\$17	-	\$11	\$62	\$143	\$61	\$5	\$3	\$88
2021	\$25	\$319	\$54	\$231	\$240	\$46	\$179	\$23	\$23	-	\$3	\$23	\$247	\$146	\$15	\$4	\$225
Median	\$25	\$252	\$19	\$57	\$187	\$46	\$115	\$20	\$2	\$15	\$8	\$56	\$149	\$50	\$10	\$3	\$65

Source: PriceFinder (2022)

5 Household Projections

Baseline population and household projections have been prepared for each of the sixteen Study Areas, Boonah SA2, Beaudesert SA2 and Tamborine – Canungra SA2 and Scenic Rim LGA for the 2021 to 2041 period. These household projections represent an update from those published in the 2020 report and incorporate additional data available from the 2021 Census.

5.1 Population Projections

Population projections published by the Queensland Government Statisticians Office (QGSO (2018)) were rebased to account for the latest estimated resident population profiles for each area as published by the Australian Bureau of Statistics. The latest ERP data indicates that as of 2021, the population was relatively evenly distributed across the three SA2s within Scenic Rim LGA, however Beaudesert and Gleneagle and Tamborine Mountain were the largest Study Areas, as detailed further in Section 2.1.

QGSO population projections (2018) between 2016 and 2041 are not available at the SA1 level, rather this data is available at the SA2, LGA and State level. Hence, the SA2 and LGA population projections have been rebased to reflect the latest estimated resident population within the Boonah, Beaudesert, and Tamborine – Canungra SA2s and within Scenic Rim LGA. This analysis identified that population growth between 2021 and 2041 was anticipated to be most significant in the Beaudesert SA2 in terms of average annual growth (3.5% per annum) and with respect to the number of additional persons (15,054 persons over the projection period). Overall, Scenic Rim LGA is anticipated to grow at a rate of 1.9% per annum, reaching a total population of 65,355 persons by 2041, as detailed in Table 5-1 below.

Table 5-1 Population Projections – Boonah SA2, Beaudesert SA2, Tamborine – Canungra SA2 and Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Boonah	12,755	13,378	13,961	15,304	16,677	1.3%
Beaudesert	15,235	20,166	24,964	28,557	30,289	3.5%
Tamborine - Canungra	16,037	16,754	17,389	17,848	18,389	0.7%
Scenic Rim LGA	44,027	50,298	56,314	61,708	65,355	2.0%

Source: Australian Bureau of Statistics Estimated Resident Population (2022) and QGSO Population Projection medium series (2018)

Generating population projections for the Study Areas involved the apportionment of the anticipated population in each SA2 with Scenic Rim LGA to the Study Areas. The proportion of total SA2 population attributed to each Study Area is based on an average of the trend in population share between 2016 and 2021 ERP in each area.

Population projections by Study Area were calculated by apportioning the SA2 population projections, in line with historic trends in the distribution of local population among the sixteen Study Areas.

The projected population estimates in this section of the report consider the potential distribution of population across the Scenic Rim, but do not consider the capacity of existing zoned land to accommodate this growth. Hence whilst these estimates represent a potential growth outlook

across the Scenic Rim, other factors such as land use policy, will influence the ultimate population distribution in 2041.

These projections indicated that within each SA2, the following Study Areas were anticipated to record the most significant population increases:

- + Within the Boonah SA2, the population of Boonah is anticipated to increase by 776 persons between 2021 and 2041, reaching 4,511 persons;
- + Beaudesert and Gleneagle, within the Beaudesert SA2, is expected to increase by 8,246 persons, from 9,479 persons in 2021 to 17,725 persons in 2041; and
- + Within the Tamborine – Canungra SA2, the population of Tamborine Mountain is anticipated to increase by 1,192 persons, from 8,466 persons in 2021 to 9,658 persons in 2041.

The below population projections are based on the historic trends in the distribution of local populations among the sixteen Study Areas, relative to the SA2s within Scenic Rim LGA between 2016 and 2021. Table 5-2 details the change in proportion of growth in the three relevant SA2s attributable to the Study Area.

Table 5-2 Population Projections – Study Areas, SA2s and Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Boonah						
Aratula	499	501	504	507	509	0.1%
Boonah	3,735	3,858	3,974	4,239	4,511	0.9%
Harrisville	470	510	547	632	719	2.2%
Kalbar	1,210	1,317	1,416	1,646	1,881	2.2%
Mt Alford	419	438	455	495	536	1.2%
Peak Crossing	528	570	609	700	792	2.1%
Roadvale	530	545	560	592	626	0.8%
Warrill View	347	350	353	360	367	0.3%
Balance	5,017	5,306	5,576	6,198	6,834	1.6%
Boonah SA2 Total	12,755	13,395	13,994	15,369	16,776	1.4%
Beaudesert SA2						
Beaudesert & Gleneagle	9,479	12,180	14,808	16,776	17,725	3.2%
Kooralbyn	1,901	2,931	3,932	4,682	5,044	5.0%
Rathdowney	171	173	176	181	183	0.3%
Bromelton	441	505	568	615	638	1.9%
Balance	3,243	4,431	5,588	6,454	6,871	3.8%
Beaudesert SA2 Total	15,235	20,166	24,964	28,557	30,461	3.5%
Tamborine – Canungra SA2						
Beechmont	634	666	695	716	741	0.8%
Canungra	1,839	1,935	2,020	2,081	2,154	0.8%
Tamborine	2,252	2,369	2,472	2,547	2,635	0.8%
Tamborine Mountain	8,466	8,829	9,151	9,384	9,658	0.7%
Balance	2,846	2,955	3,051	3,120	3,202	0.6%
Tamborine – Canungra SA2 Total	16,037	16,754	17,389	17,848	18,389	0.7%
Scenic Rim LGA	44,027	50,315	56,347	61,774	65,626	2.0%

Source: Australian Bureau of Statistics Estimated Resident Population (2020) and QGSO Population Projection medium series (2018)

5.2 Household Projections

Households are the groups of people that occupy dwellings. Households demand dwellings not vice versa. Household projections were prepared by applying an average household size to the total population projections detailed in Table 5-3 above. Section 2.2 of this report details the socio-economic characteristics of each Study Area and Scenic Rim LGA, including the average household size as of the 2016 and 2021 Censuses. It is anticipated that over time the average household size across Australia will decrease as a result of an ageing population and decreasing birth rates. As such, minor adjustments to the average household size in each Study Area (consistent with the relevant SA2) were made.

The household projections presented in this section of the report provide an estimate of the net underlying requirement for households, but are not a projection of future dwelling construction.

This calculation indicated that household growth between 2021 and 2041 is anticipated to be largest in the Beaudesert SA2, specifically in the Study Areas of Beaudesert & Gleneagle and Kooralbyn. Overall, the total number of households in Scenic Rim LGA is anticipated to increase from 16,100 households in 2021 to 25,583 households by 2041, representing average annual growth of 2.3% per annum.

Table 5-3 Household Projections – Study Areas, SA2s and Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Boonah						
Aratula	181	186	191	196	202	-0.9%
Boonah	1,439	1,512	1,584	1,720	1,864	1.1%
Harrisville	156	172	189	222	258	2.3%
Kalbar	422	468	514	610	712	2.4%
Mt Alford	178	185	191	206	222	1.4%
Peak Crossing	167	184	200	234	270	2.2%
Roadvale	175	183	192	207	223	0.9%
Warrill View	125	128	132	138	143	0.4%
Balance	1,824	1,931	2,031	2,259	2,493	1.7%
Boonah SA2 Total	4,668	4,950	5,224	5,793	6,387	1.5%
Beaudesert SA2						
Beaudesert & Gleneagle	3,571	4,688	5,826	6,750	7,297	3.5%
Kooralbyn	788	1,214	1,627	1,936	2,084	5.4%
Rathdowney	71	72	73	75	76	3.5%
Bromelton	152	177	203	224	238	2.1%
Balance	1,195	1,636	2,066	2,390	2,549	4.1%
Beaudesert SA2 Total	5,777	7,787	9,795	11,376	12,243	3.9%
Tamborine – Canungra SA2						
Beechmont	218	233	248	261	275	0.8%
Canungra	605	649	690	725	766	0.8%
Tamborine	657	702	745	781	822	0.8%

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Tamborine Mountain	3,190	3,399	3,601	3,776	3,976	0.7%
Balance	986	1,025	1,059	1,084	1,114	0.6%
Tamborine – Canungra SA2 Total	5,656	6,008	6,344	6,627	6,953	0.7%
Scenic Rim LGA	16,100	18,744	21,363	23,796	25,583	2.3%

Source: Bull & Bear Economics (2022)

5.3 Household Projections by Household Composition and Size

The last two ABS Censuses of Population and Housing provide information on the composition of households at all levels of statistical areas. This analysis utilises 2021 Census data at the SA1 level to assess the likely number of households by family composition and the number of persons residing in each household by Study Area.

The shift in household composition between 2016 and 2021 (in terms of proportion of total households in each Study Area), has been used as a growth vector between 2021 and 2041. Between 2016 and 2021, the most significant shifts in household composition were as follows:

- + Majority of the Study Areas recorded a decrease in the proportion of *family households* over the two Censuses;
- + Most of the Study Areas recorded an increasing proportion of *other households*;
- + Over the last two Censuses, almost half of the areas recorded a decrease in the proportion of six or more-person households; and
- + The incidence of three person households increased across most areas between 2016 and 2021.

Details of household composition, as a proportion of total households in each area, as of the 2016 and 2021 Censuses is detailed in Appendix B.

Assuming trends in household composition between 2016 and 2021 continue to 2041, disaggregated population estimates can be calculated in order to anticipate the likely household composition for each Study Area. The following sub-sections detail these estimates.

5.3.1 Aratula

Within the Aratula Study Area, the total number of households is anticipated to increase from 181 in 2021 to 202 in 2041, or at an average rate of 0.5% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Aratula Study Area as of 2041;
- + The incidence of couple families with children is anticipated to decrease marginally, from 50 households in 2021 to 47 households in 2041; and
- + The number of two person households within the Aratula Study Area is expected to increase most significantly between 2021 and 2041, reaching 96 households.

Table 5-4 details the household projections for the Aratula Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-4 Household Projections by Family Type and by Number of Persons – Aratula, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	71	78	78	80	82
Couple family with children	50	40	46	46	47
One Parent Family	17	16	17	18	18
Other Family	0	0	0	0	0
Total Family Households	138	134	141	144	148
Lone Person Households	44	52	50	52	54
Group Households	0	0	0	0	0
Other Households	0	0	0	0	0
Total Households	181	186	191	196	202
Number of Persons					
One Person	43	33	39	39	40
Two Person	79	93	90	94	96
Three Person	18	16	18	18	18
Four Person	19	17	19	19	20
Five Person	12	14	14	14	15
Six or more Person	9	13	12	12	13
Total Households	181	186	191	196	202

Source: Bull & Bear Economics (2022)

5.3.2 Beaudesert and Gleneagle

Within the Beaudesert and Gleneagle Study Area, the total number of households is anticipated to increase from 3,571 in 2021 to 7,297 in 2041, or at an average rate of 3.6% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of lone person households, resulting in this cohort becoming the most significant family composition in the Beaudesert and Gleneagle Study Area as of 2041;
- + However, the incidence of couple families with no children is also anticipated to grow strongly, increasing from 987 households in 2021 to 2,063 households in 2041; and
- + The number of one person households within the Beaudesert and Gleneagle Study Area is expected to increase most significantly between 2021 and 2041, reaching 2,324 households.

Table 5-5 details the household projections for the Beaudesert and Gleneagle Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-5 Household Projections by Family Type and by Number of Persons – Beaudesert and Gleneagle, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	987	1,341	1,643	1,910	2,063
Couple family with children	828	801	1,145	1,288	1,399
One Parent Family	592	781	968	1,122	1,213
Other Family	44	62	75	87	94
Total Family Households	2,451	2,985	3,831	4,407	4,770
Lone Person Households	1,039	1,590	1,857	2,182	2,354

	2021	2026	2031	2036	2041
Group Households	82	113	137	160	173
Other Households	0	0	0	0	0
Total Households	3,571	4,688	5,826	6,750	7,297
Number of Persons					
One Person	1,029	1,569	1,834	2,155	2,324
Two Person	1,267	1,196	1,735	1,946	2,115
Three Person	517	720	872	1,016	1,098
Four Person	410	646	745	878	947
Five Person	221	354	406	479	516
Six or more Person	127	203	233	275	297
Total Households	3,571	4,688	5,826	6,750	7,297

Source: Bull & Bear Economics (2022)

5.3.3 Beechmont

Within the Beechmont Study Area, the total number of households is anticipated to increase from 218 in 2021 to 275 in 2041, or at an average rate of 1.2% per annum. Significant changes to household composition in this area include the following:

- ✦ Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Beechmont Study Area as of 2041;
- ✦ The incidence of couple families with children is expected to grow marginally over the projection period, while one parent households are expected to decrease from 20 households in 2021 to 10 households in 2041; and
- ✦ The number of two person households within the Beechmont Study Area is expected to increase most significantly between 2021 and 2041, reaching 145 households.

Table 5-6 details the household projections for the Beechmont Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-6 Household Projections by Family Type and by Number of Persons – Beechmont, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	90	114	113	121	127
Couple family with children	58	46	57	58	61
One Parent Family	20	2	11	9	10
Other Family	0	0	0	0	0
Total Family Households	168	162	181	188	199
Lone Person Households	41	54	53	57	60
Group Households	8	17	14	16	17
Other Households	0	0	0	0	0
Total Households	218	233	248	261	275
Number of Persons					
One Person	44	48	50	53	56
Two Person	101	130	129	137	145
Three Person	28	21	27	27	29
Four Person	28	18	25	25	26

	2021	2026	2031	2036	2041
Five Person	17	16	18	19	20
Six or more Person	0	0	0	0	0
Total Households	218	233	248	261	275

Source: Bull & Bear Economics (2022)

5.3.4 Boonah

Within the Boonah Study Area, the total number of households is anticipated to increase from 1,439 in 2021 to 1,864 in 2041, or at an average rate of 1.3% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Boonah Study Area as of 2041;
- + The incidence of lone person households is also expected to grow strongly, increasing from 396 persons in 2021 to 502 persons in 2041;
- + The number of one person households within the Boonah Study Area is expected to increase most significantly between 2021 and 2041, reaching 704 households; and
- + The number of four person, five person, and six person and more households are anticipated to decrease over the projection period.

Table 5-7 details the household projections for the Boonah Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-7 Household Projections by Family Type and by Number of Persons – Boonah, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	520	587	597	653	707
Couple family with children	321	299	330	354	385
One Parent Family	156	177	180	196	213
Other Family	3	0	0	0	0
Total Family Households	999	1,062	1,107	1,204	1,304
Lone Person Households	396	402	428	463	502
Group Households	43	48	49	54	58
Other Households	0	0	0	0	0
Total Households	1,439	1,512	1,584	1,720	1,864
Number of Persons					
One Person	396	637	578	654	704
Two Person	599	616	661	719	778
Three Person	192	207	218	237	257
Four Person	143	52	99	97	107
Five Person	75	0	16	6	8
Six or more Person	34	0	11	7	9
Total Households	1,439	1,512	1,584	1,720	1,864

Source: Bull & Bear Economics (2022)

5.3.5 Bromelton

Within the Bromelton Study Area, the total number of households is anticipated to increase from 152 in 2021 to 238 in 2041, or at an average rate of 2.3% per annum. Significant changes to household composition in this area include the following:

- + Both couple families with children and couple families with no children in the Bromelton Study Area are expected to increase by 38 households over the projection period, with couple families with no children to remain the most significant family composition by 2041; and
- + The number of two person households within the Bromelton Study Area is expected to increase most significantly between 2021 and 2041, reaching 93 households.

Table 5-8 details the household projections for the Bromelton Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-8 Household Projections by Family Type and by Number of Persons – Bromelton, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	61	75	84	93	98
Couple family with children	57	73	81	90	95
One Parent Family	10	4	8	8	9
Other Family	0	0	0	0	0
Total Family Households	128	152	173	191	202
Lone Person Households	24	26	30	33	35
Group Households	0	0	0	0	0
Other Households	0	0	0	0	0
Total Households	152	177	203	224	238
Number of Persons					
One Person	23	27	30	34	36
Two Person	60	70	80	88	93
Three Person	32	38	44	48	51
Four Person	22	25	29	32	34
Five Person	8	9	10	11	12
Six or more Person	8	9	10	11	12
Total Households	152	177	203	224	238

Source: Bull & Bear Economics (2022)

5.3.6 Canungra

Within the Canungra Study Area, the total number of households is anticipated to increase from 605 in 2021 to 766 in 2041, or at an average rate of 1.2% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with children, resulting in this cohort becoming the most significant family composition in the Canungra Study Area as of 2041;
- + The number of one person households within the Canungra Study Area is expected to increase most significantly between 2021 and 2041, reaching 161 households. However, three person and two person households are projected to record strong growth over the projection period; and

- + The incidence of six or more person households is anticipated to decrease slightly, from 25 households in 2021 to 21 households in 2041.

Table 5-9 details the household projections for the Canungra Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-9 Household Projections by Family Type and by Number of Persons – Canungra, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	181	194	207	217	229
Couple family with children	237	259	273	287	303
One Parent Family	63	64	70	73	77
Other Family	4	8	7	8	8
Total Family Households	485	525	556	585	617
Lone Person Households	102	105	114	119	126
Group Households	18	19	20	21	23
Other Households	0	0	0	0	0
Total Households	605	649	690	725	766
Number of Persons					
One Person	102	151	141	153	161
Two Person	214	197	225	233	246
Three Person	116	146	146	155	163
Four Person	97	90	102	105	112
Five Person	51	53	57	60	63
Six or more Person	25	12	20	19	21
Total Households	605	649	690	725	766

Source: Bull & Bear Economics (2022)

5.3.7 Harrisville

Within the Harrisville Study Area, the total number of households is anticipated to increase from 156 in 2021 to 258 in 2041, or at an average rate of 2.5% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with children, resulting in this cohort becoming the most significant family composition in the Harrisville Study Area as of 2041; and
- + The incidence of two person, three person and four person households is anticipated to grow strongly over the projection period, with the number of three person households within the Harrisville Study Area expected to increase most significantly between 2021 and 2041, reaching 60 households.

Table 5-10 details the household projections for the Harrisville Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-10 Household Projections by Family Type and by Number of Persons – Harrisville, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	45	47	53	62	72
Couple family with children	62	73	78	92	107
One Parent Family	21	14	20	22	26

	2021	2026	2031	2036	2041
Other Family	0	0	0	0	0
Total Family Households	128	134	150	176	205
Lone Person Households	23	26	28	33	39
Group Households	6	12	10	13	15
Other Households	0	0	0	0	0
Total Households	156	172	189	222	258
Number of Persons					
One Person	23	30	31	37	43
Two Person	55	49	59	68	79
Three Person	30	44	43	52	60
Four Person	32	42	42	51	59
Five Person	11	2	6	6	8
Six or more Person	7	6	7	8	10
Total Households	156	172	189	222	258

Source: Bull & Bear Economics (2022)

5.3.8 Kalbar

Within the Kalbar Study Area, the total number of households is anticipated to increase from 422 in 2021 to 712 in 2041, or at an average rate of 2.6% per annum. Significant changes to household composition in this area include the following:

- ✦ Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Kalbar Study Area as of 2041. However, couple families with children and lone person households are also expected to record significant growth; and
- ✦ The number of three person households within the Kalbar Study Area is expected to increase most significantly between 2021 and 2041, reaching 168 households.

Table 5-11 details the household projections for the Kalbar Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-11 Household Projections by Family Type and by Number of Persons – Kalbar, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	142	164	177	211	246
Couple family with children	129	133	151	177	207
One Parent Family	52	50	58	68	80
Other Family	0	0	0	0	0
Total Family Households	323	347	386	457	533
Lone Person Households	90	108	115	137	160
Group Households	9	13	13	16	19
Other Households	0	0	0	0	0
Total Households	422	468	514	610	712
Number of Persons					
One Person	62	30	51	56	66
Two Person	148	133	161	187	219

	2021	2026	2031	2036	2041
Three Person	80	123	119	145	168
Four Person	85	99	107	127	149
Five Person	28	53	48	60	69
Six or more Person	18	30	28	35	40
Total Households	422	468	514	610	712

Source: Bull & Bear Economics (2022)

5.3.9 Kooralbyn

Within the Kooralbyn Study Area, the total number of households is anticipated to increase from 788 in 2021 to 2,084 in 2041, or at average rate of 5.0% per annum.

Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Kooralbyn Study Area as of 2041;
- + The incidence of lone person households are also anticipated to grow strongly, increasing from 236 households in 2021 to 734 households in 2041; and
- + The number of two person households within the Kooralbyn Study Area is expected to increase most significantly between 2021 and 2041, reaching 998 households.

Whilst the analysis suggests growth of 1,296 households over the next 20 years in Kooralbyn, it is understood that there is likely insufficient capacity within Kooralbyn to accommodate this growth due to land constraints (estimated capacity for an additional 828 dwellings in the Urban Footprint in Kooralbyn).

Table 5-12 details the household projections for the Kooralbyn Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-12 Household Projections by Family Type and by Number of Persons – Kooralbyn, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	308	499	656	784	843
Couple family with children	143	185	268	313	338
One Parent Family	74	32	89	94	103
Other Family	8	24	26	33	35
Total Family Households	533	741	1,039	1,224	1,319
Lone Person Households	236	461	563	684	734
Group Households	20	11	26	28	31
Other Households	0	0	0	0	0
Total Households	788	1,214	1,627	1,936	2,084
Number of Persons					
One Person	238	439	547	662	711
Two Person	339	612	769	929	998
Three Person	99	62	135	146	160
Four Person	59	9	59	58	65
Five Person	24	75	79	100	107
Six or more Person	28	17	38	41	44
Total Households	788	1,214	1,627	1,936	2,084

Source: Bull & Bear Economics (2022)

5.3.10 Mt Alford

Within the Mt Alford Study Area, the total number of households is anticipated to increase from 178 in 2021 to 222 in 2041, or at an average rate of 1.1% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Mt Alford Study Area as of 2041;
- + The incidence of couple families with children is expected to decrease slightly, from 41 households in 2021 to 35 households in 2041;
- + The number of lone person households is expected to also grow significantly, increasing by 20 households, reaching 65 households in 2041; and
- + The number of two person households within the Mt Alford Study Area is expected to increase most significantly between 2021 and 2041, reaching 122 households, while three person, four person and five person households are expected to decrease over the projection period.

Table 5-13 details the household projections for the Mt Alford Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-13 Household Projections by Family Type and by Number of Persons – Mt Alford, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	76	91	88	97	104
Couple family with children	41	22	32	32	35
One Parent Family	12	9	11	11	12
Other Family	0	0	0	0	0
Total Family Households	129	122	131	140	151
Lone Person Households	45	58	55	60	65
Group Households	4	5	5	5	6
Other Households	0	0	0	0	0
Total Households	178	185	191	206	222
Number of Persons					
One Person	45	61	58	64	69
Two Person	82	107	103	114	122
Three Person	17	4	10	9	10
Four Person	17	0	6	4	5
Five Person	7	0	0	0	0
Six or more Person	11	13	13	15	16
Total Households	178	185	191	206	222

Source: Bull & Bear Economics (2022)

5.3.11 Peak Crossing

Within the Peak Crossing Study Area, the total number of households is anticipated to increase from 167 in 2021 to 270 in 2041, or at an average rate of 2.4% per annum. Significant changes to household composition in this area include the following:

- + By 2041, couple families with children will remain the most significant family composition in the Peak Crossing Study Area, however the incidence of couple families with no children will grow most significantly; and
- + The number of two person, three person and four person households within the Peak Crossing Study Area are expected to record the most significant growth, however the number of four person households is anticipated to increase most significantly between 2021 and 2041, reaching 71 households.

Table 5-14 details the household projections for the Peak Crossing Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-14 Household Projections by Family Type and by Number of Persons – Peak Crossing, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	55	70	72	85	98
Couple family with children	74	76	85	99	115
One Parent Family	22	30	30	35	41
Other Family	0	0	0	0	0
Total Family Households	151	175	187	220	253
Lone Person Households	16	8	13	15	17
Group Households	0	0	0	0	0
Other Households	0	0	0	0	0
Total Households	167	184	200	234	270
Number of Persons					
One Person	15	3	10	10	11
Two Person	59	48	60	69	80
Three Person	28	42	40	48	56
Four Person	36	53	51	62	71
Five Person	18	21	22	26	30
Six or more Person	11	17	16	20	23
Total Households	167	184	200	234	270

Source: Bull & Bear Economics (2022)

5.3.12 Rathdowney

Within the Rathdowney Study Area, the total number of households is anticipated to increase from 71 in 2021 to 76 in 2041, or at an average rate of 0.3% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of lone person households, resulting in this cohort becoming the most significant family composition in the Rathdowney Study Area as of 2041;
- + Couple families with children and one parent family households are expected to decrease over the projection period; and
- + The number of one person households within the Rathdowney Study Area is expected to increase most significantly between 2021 and 2041, reaching 35 households, while two person households are expected to decrease over the projection period.

Table 5-15 details the household projections for the Rathdowney Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-15 Household Projections by Family Type and by Number of Persons – Rathdowney, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	19	23	22	23	24
Couple family with children	14	8	11	11	11
One Parent Family	8	4	6	6	6
Other Family	0	0	0	0	0
Total Family Households	41	36	39	40	40
Lone Person Households	27	36	33	35	35
Group Households	3	0	0	0	0
Other Households	0	0	0	0	0
Total Households	71	72	73	75	76
Number of Persons					
One Person	28	35	33	34	35
Two Person	27	19	23	22	23
Three Person	11	11	11	11	11
Four Person	0	0	0	0	0
Five Person	0	0	0	0	0
Six or more Person	5	7	7	7	7
Total Households	71	72	73	75	76

Source: Bull & Bear Economics (2022)

5.3.13 Roadvale

Within the Roadvale Study Area, the total number of households is anticipated to increase from 175 in 2021 to 223 in 2041, or at an average rate of 1.2% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with children, resulting in this cohort becoming the most significant family composition in the Roadvale Study Area as of 2041;
- + The incidence of one parent family households is expected to decrease over the projection period; and
- + The number of two person households within the Roadvale Study Area is expected to increase most significantly between 2021 and 2041, reaching 101 households.

Table 5-16 details the household projections for Roadvale Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-16 Household Projections by Family Type and by Number of Persons – Roadvale, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	63	58	65	69	74
Couple family with children	68	78	79	86	93
One Parent Family	9	0	3	2	3
Other Family	4	8	7	8	8
Total Family Households	144	144	153	165	178
Lone Person Households	29	33	34	37	39
Group Households	3	6	5	6	6

	2021	2026	2031	2036	2041
Other Households	0	0	0	0	0
Total Households	175	183	192	207	223
Number of Persons					
One Person	29	23	27	29	31
Two Person	70	88	86	94	101
Three Person	25	29	29	32	34
Four Person	25	18	23	24	26
Five Person	17	20	20	22	23
Six or more Person	9	6	7	8	8
Total Households	175	183	192	207	223

Source: Bull & Bear Economics (2022)

5.3.14 Tamborine

Within the Tamborine Study Area, the total number of households is anticipated to increase from 657 in 2021 to 822 in 2041, or at an average rate of 1.1% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of couple families with children, resulting in this cohort becoming the most significant family composition in the Tamborine Study Area as of 2041;
- + The number of four person households within the Tamborine Study Area is expected to increase most significantly between 2021 and 2041, reaching 215 households; and
- + The incidence of one person and two person households is expected to decrease between 2021 and 2041.

Table 5-17 details the household projections for Tamborine Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-17 Household Projections by Family Type and by Number of Persons – Tamborine, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	202	190	213	220	233
Couple family with children	304	342	355	374	394
One Parent Family	68	77	80	84	89
Other Family	6	6	6	6	7
Total Family Households	579	615	654	685	721
Lone Person Households	61	62	67	70	74
Group Households	17	25	24	26	27
Other Households	0	0	0	0	0
Total Households	657	702	745	781	822
Number of Persons					
One Person	61	0	8	0	0
Two Person	209	134	187	187	199
Three Person	136	184	184	197	207
Four Person	135	195	190	205	215
Five Person	50	66	67	72	75
Six or more Person	64	122	109	121	126

	2021	2026	2031	2036	2041
Total Households	657	702	745	781	822

Source: Bull & Bear Economics (2022)

5.3.15 Tamborine Mountain

Within the Tamborine Mountain Study Area, the total number of households is anticipated to increase from 3,190 in 2021 to 3,976 in 2041, or at an average rate of 1.1% per annum. Significant changes to household composition in this area include the following:

- + By 2041, it is expected that couple families with no children will remain the most significant family composition, however couple families with children will grow most significantly between 2021 and 2041;
- + Lone person households are expected to grow significantly, increasing from 692 households in 2021 to 872 households in 2041, or by 1.2% per annum; and
- + The number of two person households within the Tamborine Mountain Study Area is expected to increase most significantly between 2021 and 2041, reaching 1,683 households.

Table 5-18 details the household projections for Tamborine Mountain Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-18 Household Projections by Family Type and by Number of Persons – Tamborine Mountain, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	1,169	1,222	1,305	1,366	1,439
Couple family with children	910	1,035	1,067	1,126	1,184
One Parent Family	308	259	306	313	331
Other Family	14	18	18	19	20
Total Family Households	2,401	2,534	2,696	2,824	2,974
Lone Person Households	692	749	788	828	872
Group Households	98	115	117	124	130
Other Households	0	0	0	0	0
Total Households	3,190	3,399	3,601	3,776	3,976
Number of Persons					
One Person	692	737	781	819	862
Two Person	1,350	1,439	1,524	1,598	1,683
Three Person	450	480	508	533	561
Four Person	439	468	495	520	547
Five Person	178	190	201	211	222
Six or more Person	81	86	92	96	101
Total Households	3,190	3,399	3,601	3,776	3,976

Source: Bull & Bear Economics (2022)

5.3.16 Warrill View

Within the Warrill View Study Area, the total number of households is anticipated to increase from 125 in 2021 to 143 in 2041, or at an average rate of 0.7% per annum. Significant changes to household composition in this area include the following:

- + Increasing incidence of family households resulting in the number of households increasing to 111 family households by 2041;
- + Increasing incidence of couple families with no children, resulting in this cohort becoming the most significant family composition in the Warrill View Study Area as of 2041, while the incidence of couple families with children is expected to decrease; and
- + The number of two person households within the Warrill View Study Area is expected to increase most significantly between 2021 and 2041, reaching 69 households.

Table 5-19 details the household projections for Warrill View Study Area with respect to family composition and the number of persons usually residing in each household between 2021 and 2041.

Table 5-19 Household Projections by Family Type and by Number of Persons – Warrill View, 2021 to 2041

	2021	2026	2031	2036	2041
Family Composition					
Couple family with no children	49	63	60	64	66
Couple family with children	37	16	26	25	26
One Parent Family	14	18	17	18	19
Other Family	0	0	0	0	0
Total Family Households	100	97	103	106	111
Lone Person Households	25	31	30	31	33
Group Households	0	0	0	0	0
Other Households	0	0	0	0	0
Total Households	125	128	132	138	143
Number of Persons					
One Person	24	25	26	27	28
Two Person	60	62	63	66	69
Three Person	12	13	13	13	14
Four Person	17	18	18	19	20
Five Person	5	5	5	5	6
Six or more Person	6	6	6	7	7
Total Households	125	128	132	138	143

Source: Bull & Bear Economics (2022)

5.4 Comparison of Outcomes, 2021 and 2022 Studies

The release of the 2021 Census data has allowed for a recalibration of the projected population, dwelling and household outlook for Scenic Rim and its component Study Areas. The assessment has identified that as of 2021, whilst the total population was 401 persons higher than previously anticipated, these persons were accommodated in 550 fewer dwellings, due to the general trend in increasing average household sizes.

By 2041, the modelled results anticipate an additional 191 dwellings relative to the previous study, with the most significant shifts anticipated to be:

- + Tamborine Mountain: An additional 390 dwellings relative to the previous modelled outcomes by 2041;
- + Balance of Beaudesert SA2: An additional 169 dwellings relative to the previous modelled outcomes by 2041;
- + Kooralbyn: An additional 148 dwellings relative to the previous modelled outcomes by 2041 (although it is recognised this outcome is unlikely to be achieved due to constraints);

- + Tamborine: 173 fewer dwellings relative to the previous modelled outcomes by 2041; and
- + Boonah: 125 fewer dwellings relative to the previous modelled outcomes by 2041.

6 Demand for Specialised Housing Typologies

This section examines the demand for retirement village Independent Living Units (ILUs) (including manufactured home park sites) and residential aged care places within the Boonah, Beaudesert and Tamborine – Canungra SA2s and Scenic Rim LGA as a whole. It also considers existing, pending and approved supply for retirement village ILUs (and manufactured home park sites) and residential aged care places within Scenic Rim LGA.

The approaches utilised to generate demand estimates for retirement village ILUs estimates and residential aged care places estimates are outlined in Table 6-1.

Table 6-1 Retirement Village ILUs and Residential Aged Care Places Demand Methodology

Type of Specialised Housing Typology	Approach
Retirement Village ILUs Demand	<ul style="list-style-type: none"> Derive current and projected population aged 65+; Assume there are 1.3 persons per ILU; Apply historical take-up rate of 2.4% for Manufactured Home Parks and Retirement Villages for persons aged 65+ (2016 Census) to population aged 65+; and Derive Retirement Village ILUs demand estimates.
Residential Aged Care Places Demand	<ul style="list-style-type: none"> Derive current and projected population aged 70+; Assume there is 1 person per residential aged care bed; Apply Queensland provision ratio of 7.5% (2020) to population aged 70+; and Derive Residential Aged Care place estimates.

Source: Bull & Bear Economics (2022)

6.1 Population Projections for Relevant Age Cohorts

As at 30 June 2021, Scenic Rim LGA had an estimated residential population of 44,027 persons. This is anticipated to increase by 21,599 persons to 65,626 persons in 2041. This is an increase to the average annual growth figure (2% from 1.9%), using the updated 30 June 2021 ERP compared to the earlier 30 June 2019 ERP. Relevantly, Scenic Rim LGA had an estimated residential population of 9,866 persons aged 65 years and older in 2021. This is anticipated to increase by 9,814 persons to 19,680 persons aged 65 years and older in 2041. The 65 years and older cohort is typically used to inform retirement village ILUs demand modelling. Similarly, Scenic Rim LGA had an estimated residential population of 6,887 persons aged 70 years and over in 2021. This is anticipated to increase by 8,163 persons to 15,049 persons aged 70 years and over in 2041. The 70 years and older cohort is typically used to inform residential aged care places demand modelling. Across the two age cohorts, there has been an increase to the average annual growth figure to 4%, from the 3.9% as a total for the Scenic Rim LGA, between the updated 30 June 2021 ERP and the earlier 30 June 2019 ERP.

Table 6-2 denotes total population estimates, 65 years and older population estimates and 70 years and over population estimates for Scenic Rim LGA and its components SA2s between 2021 and 2041.

Table 6-2 Estimated Residential Population by Age Group – Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041	Average Annual Growth, 2021-41
Total Population						
Boonah	12,755	13,395	13,994	15,369	16,776	1.4%
Beaudesert	15,235	20,166	24,964	28,557	30,461	3.5%
Tamborine - Canungra	16,037	16,754	17,389	17,848	18,389	0.7%
Scenic Rim LGA	44,027	50,315	56,347	61,774	65,626	2.0%
65+ population						
Boonah	3,099	3,597	4,068	4,722	5,400	2.8%
Beaudesert	3,564	5,246	7,104	8,702	9,620	5.1%
Tamborine - Canungra	3,203	3,684	4,102	4,408	4,660	1.9%
Scenic Rim LGA	9,866	12,526	15,273	17,831	19,680	3.5%
70+ population						
Boonah	2,157	2,563	2,972	3,534	4,088	3.2%
Beaudesert	2,556	3,817	5,284	6,635	7,539	5.6%
Tamborine - Canungra	2,174	2,532	2,897	3,183	3,422	2.3%
Scenic Rim LGA	6,887	8,911	11,154	13,351	15,049	4.0%

Source: ABS (2021), Regional population by age and sex, Cat. No. 3235.0, Australian Bureau of Statistics, Canberra; and QGSO (2022), Queensland Government population projections: Regions: 2016 to 2041, Queensland Treasury, Canberra

6.2 Retirement Villages and Manufactured Home Park Supply

Given that manufactured home parks also cater to the over 50s market (i.e. the retirement village ILUs market), relevant manufactured home park datasets have also been examined in the following sections.

6.2.1 Existing Supply

As of 30 April 2022, there were two registered retirement villages within Scenic Rim LGA, providing a total of 66 independent living units (ILUs). These retirement villages are both situated within Boonah SA2. Within Scenic Rim, Capo di Monte provides an alternative lifestyle village (not registered) located in Tamborine Mountain, this facility consists of 45 community titled dwellings. However, for the purpose of this assessment this facility is not included in an assessment of supply as it is not a formalised retirement village.

Table 6-3 outlines the retirement village ILUs located in Scenic Rim LGA as of 30 April 2022.

Table 6-3 Retirement Village ILU Supply – Scenic Rim LGA, 30 April 2022

Name	Address	SA2	Registration Date	No. of ILUs
Fassifern Retirement Village	Harold Stark Ave, Boonah	Boonah	21/10/2003	47
Trinity Lutheran Units Boonah (Teviot Villages)	16-18 Church St, Boonah	Boonah	11/05/2006	19
Total				66

Source: Department of Communities, Housing and Digital Economy (2022), Retirement Villages Register, Queensland Government, Brisbane

As of 28 June 2022, there are two purpose-built manufactured home parks (MHP), providing a total of 41 manufactured home sites. Ingenia Lifestyle Beaudesert Oakland Village was registered as a

manufactured home park in June 2022 and currently offers seven manufactured homes. However, Ingenia Lifestyle Beaudesert will eventually offer 147 manufactured homes.

Table 6-4 outlines the manufactured home parks located in Scenic Rim LGA as of 28 June 2022.

Table 6-4 Manufactured Home Park Supply – Scenic Rim LGA, 28 June 2022

Name	Address	SA2	Registration Date	No. of MH Sites
Elysium Village	339-347 Brisbane St, Beaudesert	Beaudesert	27/06/2013	34
Ingenia Lifestyle Beaudesert - Oakland Village	27 Oakland Way, Beaudesert	Beaudesert	13/06/2022	7
Total				41

Source: Department of Communities, Housing and Digital Economy (2022), Residential Parks (Manufactured Homes) Register, Queensland Government, Brisbane

6.2.2 Approved Supply

Based on a search on Scenic Rim Regional Council's Development Application and Property Online Service on 13 June 2022, there were two approved development applications for retirement facilities, totaling 368 ILUs.

Table 6-5 outlines the current approved development applications for retirement village ILUs in Scenic Rim LGA.

Table 6-5 Approved Development Applications for Retirement Village ILUs – Scenic Rim LGA

Application Number	Address	SA2	No. of ILUs
MCU20/133	Finch Road Canungra QLD 4275	Tamborine - Canungra	188
MCU20/067	163 Teviotville Rd, Kalbar QLD 4309	Boonah	180
Total			368

Source: Scenic Rim Regional Council (2022), Development Application and Property Online service, Scenic Rim Regional Council, Beaudesert

6.2.3 Historic Take-up rates

As of the 2016 Census, Scenic Rim LGA had a take up rate of 0.0% (nil growth relative to 2011 Census) for manufactured home parks and 2.4% for retirement villages (up 0.7% points relative to 2011 Census) for persons aged 65 years and over.

The 2016 take-up rate for Scenic Rim LGA is well below the average recorded for South East Queensland (SEQ) (0.3% for manufactured home parks and 7.4% for retirement villages) and the average recorded for Queensland (0.2% for manufactured home parks and 6.2% for retirement villages).

A comparative assessment was undertaken to understand the relative take-up of manufactured home parks and retirement villages within coastal SEQ (i.e. Gold Coast LGA, Sunshine Coast LGA) and surrounding LGAs (i.e. Lockyer Valley LGA, Toowoomba LGA).

The take-up rates within Lockyer Valley LGA were similar to Scenic Rim LGA in 2011 and 2016, with all other LGAs analysed recording significantly higher take-up rates, likely reflective of relative supply and hence opportunities for take-up.

Table 6-6 details the historical take-up rates of manufactured home parks and retirement villages in 2011 and 2016.

Table 6-6 Historical Take-up rates by Statistical Geography – Manufactured Home Parks and Retirement Villages – Scenic Rim LGA, 2011 and 2016

Statistical Geography	2011	2016	Growth, 2011-16 (%)
Manufactured Home Parks			
Gold Coast LGA	1.2%	0.9%	-0.4%
Sunshine Coast LGA	0.5%	0.0%	-0.4%
Lockyer Valley LGA	0.2%	0.2%	0.0%
Toowoomba LGA	0.0%	0.0%	0.0%
Scenic Rim LGA	0.0%	0.0%	0.0%
Boonah SA2	0.0%	0.0%	0.0%
Beaudesert SA2	0.0%	0.0%	0.0%
Tamborine – Canungra SA2	0.0%	0.0%	0.0%
SEQ	0.4%	0.3%	-0.1%
Queensland	0.3%	0.2%	-0.1%
Retirement Villages			
Gold Coast LGA	5.2%	5.8%	0.6%
Sunshine Coast LGA	11.6%	11.5%	-0.1%
Lockyer Valley LGA	1.3%	0.7%	-0.5%
Toowoomba LGA	7.6%	7.7%	0.1%
Scenic Rim LGA	1.6%	2.4%	0.7%
Boonah SA2	2.2%	2.5%	0.2%
Beaudesert SA2	2.8%	2.8%	0.0%
Tamborine – Canungra SA2	0.0%	1.8%	1.8%
SEQ	7.2%	7.4%	0.2%
Queensland	6.2%	6.2%	0.0%
Manufactured Home Parks and Retirement Villages			
Gold Coast LGA	6.4%	6.7%	0.2%
Sunshine Coast LGA	12.1%	11.5%	-0.6%
Lockyer Valley LGA	1.4%	1.0%	-0.5%
Toowoomba LGA	7.6%	7.7%	0.1%
Scenic Rim LGA	1.6%	2.4%	0.7%
Boonah SA2	2.2%	2.5%	0.2%
Beaudesert SA2	2.8%	2.8%	0.0%
Tamborine – Canungra SA2	0.0%	1.8%	1.8%
SEQ	7.6%	7.7%	0.1%
Queensland	6.5%	6.5%	0.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra; and ABS (2012), 2011 Census of Population and Households, Australian Bureau of Statistics, Canberra

6.2.4 Demand & Supply Assessment

Demand for retirement living facilities in Scenic Rim LGA has been derived based on population projections for persons aged 65 years and over and by consistently applying the 2016 historical take-up rate of 2.4% for manufactured home parks and retirement villages in Scenic Rim LGA. This assessment also assumes that there are 1.3 persons per ILU / manufactured home park dwelling.

As of 2021, there is demand for 57 ILUs in Boonah SA2 (up from 51 in 2020), 65 ILUs in Beaudesert SA2 (up from 54 in 2020) and 58 ILUs in Tamborine – Canungra SA2 (up from 51 in 2020). In total, there is demand for 180 ILUs in scenic Rim in 2021. By 2041, demand for retirement living ILUs is anticipated to grow to 98 ILUs in Boonah SA2, 175 ILUs in Beaudesert SA2 and 85 ILUs in Tamborine – Canungra SA2. In total, retirement living ILU demand in Scenic Rim LGA is expected to reach 359 ILUs by 2041 (up from 328 in 2020).

Table 6-7 details demand for retirement village and manufactured home park ILUs within Scenic Rim LGA.

Table 6-7 Demand for Retirement Living ILUs – Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Boonah SA2	57	66	74	86	98
Beaudesert SA2	65	96	130	159	175
Tamborine – Canungra SA2	58	67	75	80	85
Scenic Rim LGA	180	228	279	325	359

Source: Bull & Bear Economics (2022)

As discussed previously, there are 41 manufactured home park units and 66 retirement village units within Scenic Rim LGA. As for approved supply, there are 368 ILUs approved (180 units in Boonah SA2 and 188 units in Tamborine – Canungra SA2). However, there are an additional 140 units anticipated to be built at Ingenia Lifestyle Beaudesert over the next decade. As such, it is expected that the two approved development applications outlined in Table 6-4 will be completed by 2026, while half of the remaining ILUs to be developed in the Ingenia Lifestyle Beaudesert are expected to be completed by 2026, with all 140 units to be completed by 2031.

It has been assumed that the 2021 supply of ILUs will increase in 2026 with the completion of the approved development applications (except for Ingenia Lifestyle Beaudesert which will increase by half by 2026 and will be fully completed by 2031). As such, in 2021 there was an oversupply of 9 ILUs in Boonah SA2, an undersupply of 31 ILUs in Beaudesert SA2 and an undersupply of 58 ILUs in Tamborine – Canungra SA2. Collectively, there was an undersupply of 80 ILUs in Scenic Rim LGA in 2021. By 2041, there is an anticipated oversupply of 148 ILUs in Boonah SA2, an oversupply of 6 ILUs in Beaudesert SA2 and an oversupply of 103 ILUs in Tamborine – Canungra SA2. In total, an oversupply of 256 ILUs is expected within Scenic Rim LGA by 2041. This 2022 update marks a change in the earlier identification of an undersupply of ILUs by 2041 for the Tamborine-Canungra SA2. The recent approval of 188 units at Finch Road, Canungra, has resulted in an earlier identified undersupply in the Tamborine- Canungra SA2 being corrected. At an LGA wide level, it appears that there is sufficient existing and approved ILUs.

Table 6-8 details the supply demand balance of retirement village ILUs between 2021 and 2041 for Scenic Rim LGA.

Table 6-8 Retirement Living ILUs Supply Demand Balance – Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for ILUs					
Boonah SA2	57	66	74	86	98
Beaudesert SA2	65	96	130	159	175
Tamborine – Canungra SA2	58	67	75	80	85
Scenic Rim LGA	180	228	279	325	359
Existing ILUs and MHP Sites Supply					
Boonah SA2	66	66	66	66	66
Beaudesert SA2	34	41	41	41	41
Tamborine – Canungra SA2	-	-	-	-	-
Scenic Rim LGA	100	107	107	107	107
Approved ILUs and MHP Sites Supply					
Boonah SA2	180	180	180	180	180
Beaudesert SA2	-	70	140	140	140
Tamborine – Canungra SA2	188	188	188	188	188
Scenic Rim LGA	438	438	508	508	508
Total Supply					
Boonah SA2	66	246	246	246	246
Beaudesert SA2	34	111	181	181	181
Tamborine – Canungra SA2	0	188	188	188	188
Scenic Rim LGA	100	545	615	615	615
Supply Demand Balance					
Boonah SA2	9	180	172	160	148
Beaudesert SA2	-31	15	51	22	6
Tamborine – Canungra SA2	-58	121	113	108	103
Scenic Rim LGA	-80	317	336	290	256

Note: The supply of ILUs in Beaudesert SA2 was 34 ILUs as the Ingenia Lifestyle Beaudesert facility was not opened until 2022. It is also assumed that the ILUs at the approved developments will become available by 2026, except for the development application for Ingenia Lifestyle Beaudesert. The development of this manufactured home park will occur in stages – half of the total manufactured homes are anticipated to be completed by 2026, while the total development will be completed by 2031; A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

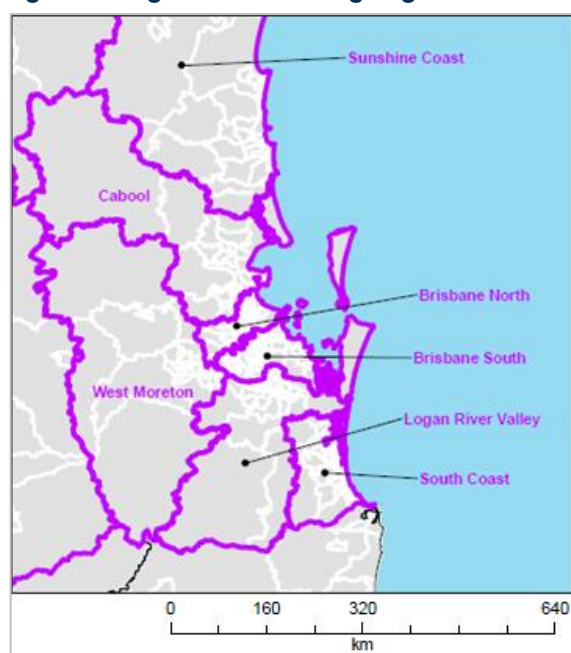
Source: Bull & Bear Economics (2022)

6.3 Residential Aged Care

Scenic Rim LGA is split across two Aged Care Planning Regions (ACPR) as of 2018, with these being:

- + West Moreton ACPR: Boonah SA2; and
- + Logan River Valley ACPR: Beaudesert SA2 and Tamborine – Canungra SA2.

Figure 6-1 Aged Care Planning Regions 2018 - Queensland



Source: Department of Health (2018), Aged Care Planning Regions 2018, Australian Government, Canberra

6.3.1 Existing & Approved Supply

As of 30 June 2021, there were 396 residential aged care places in Scenic Rim LGA, as detailed in Table 6-9 below.

Table 6-9 Residential Aged Care Places – Scenic Rim LGA, 30 June 2021

Name	Address	ACPR	SA2	No. of Residential Aged Care Places
Churches of Christ Care Fassifern Aged Care Service Boonah	1 Harold Stark Avenue	West Moreton	Boonah	131
Wongaburra Garden Settlement Hostel	210 Brisbane Street	Logan River Valley	Beaudesert	125
Beaumont Care Roslyn Lodge	24 Main Western Road	Logan River Valley	Tamborine - Canungra	38
Whiddon Beaudesert Star	14 Brooklands Drive	Logan River Valley	Beaudesert	102
Total				396

Source: Australian Institute of Health and Welfare (2021), Aged care service list: 30 June 2021, Australian Government, Canberra

Based on a search on Scenic Rim Regional Council's Development Application and Property Online Service on 13 June 2022, there were two approved development applications consisting of an extension of a previous approval (60 places) for a residential aged care facility and a residential aged care facility to be located in Harrisville (Boonah SA2) for 51 places.

Table 6-10 Approved Development Applications for Residential Aged Care Facilities – Scenic Rim LGA

Application Number	Address	SA2	No. of Places
MCU20/067	163 Teviotville Rd, Kalbar QLD 4309	Boonah	60
MCU20/124	60 North Street HARRISVILLE QLD 4307	Boonah	51
Total			111

Source: Scenic Rim Regional Council (2022), Development Application and Property Online service, Scenic Rim Regional Council, Beaudesert

6.3.2 Demand & Supply Assessment

This assessment assumes that there is one person per residential aged care bed. Based on the population projections for persons aged 70 years and over and applying the Queensland provision ratio of 7.5%³, demand for residential aged care places is derived.

In 2021, there was demand for 162 places in Boonah SA2 (up from 154 in 2020), 192 places in Beaudesert SA2 (up from 166 in 2020) and 163 places in Tamborine – Canungra SA2 (down from 166 in 2020). In total, there was demand for 517 residential aged care places in Scenic Rim LGA (up from 469 in 2020). By 2041, demand for residential aged care places is anticipated to grow to 307 places in Boonah SA2, 565 places in Beaudesert SA2 and 257 places in Tamborine – Canungra SA2. In total, demand for residential aged care places in Scenic Rim LGA is anticipated to reach 1,129 places by 2041 (a marginal increase from the predicted 1092 in 2020).

Table 6-11 details demand for residential aged care places within Scenic Rim LGA between 2021 and 2041.

Table 6-11 Demand for Residential Aged Care Places – Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Boonah SA2	162	192	223	265	307
Beaudesert SA2	192	286	396	498	565
Tamborine – Canungra SA2	163	190	217	239	257
Scenic Rim LGA	517	668	837	1,001	1,129

Source: Bull & Bear Economics (2022)

In 2021, there was a total of 396 residential aged care places in Scenic Rim LGA, comprised of 131 places in Boonah SA2, 227 places in Beaudesert SA2 and 38 places in Tamborine – Canungra SA2, as discussed previously. As for approved supply, there are two approved development applications for residential aged care facilities in Boonah SA2 which will provide a total of 111 places.

To derive the supply demand balance, it has been assumed that supply remains constant at 2021 levels until 2026, whereby any approved development applications are assumed to have been fully built by 2026. From 2026 onwards, it is assumed supply will remain constant. As such, at 2021 levels the assessment has found that there was an undersupply of 31 places in Boonah SA2 (reduced from an over-supply of 37 using the 2020 report base), an oversupply of 35 places in Beaudesert SA2 (reduced from an over-supply of 61 using the 2020 report base) and an under-supply of 125 places in Tamborine – Canungra SA2 (reduced from an under-supply of 128 using the 2020 report base). Collectively, there was an undersupply of 121 places within Scenic Rim LGA in 2021. This undersupply is expected to increase to 622 places by 2041 within Scenic Rim LGA (reduced slightly from an under-supply of 636 using the 2020 report base) and is comprised of an undersupply of 65 places in Boonah SA2, an undersupply of 338 places in Beaudesert SA2 and an undersupply of 219 places in Tamborine – Canungra SA2.

Table 6-12 details the supply demand balance of residential aged care places between 2021 and 2041 in Scenic Rim LGA.

³ Productivity Commission (2021), Report on Government Services 2021 – Chapter 14 Aged Care Services, Australian Government, Canberra

Table 6-12 Residential Aged Care Facilities Supply Demand Balance – Scenic Rim LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Demand for Residential Aged Care Places					
Boonah SA2	162	192	223	265	307
Beaudesert SA2	192	286	396	498	565
Tamborine – Canungra SA2	163	190	217	239	257
Scenic Rim LGA	517	668	837	1,001	1,129
Existing Residential Aged Care Places Supply					
Boonah SA2	131	131	131	131	131
Beaudesert SA2	227	227	227	227	227
Tamborine – Canungra SA2	38	38	38	38	38
Scenic Rim LGA	396	396	396	396	396
Approved Residential Aged Care Places Supply					
Boonah SA2	111	111	111	111	111
Beaudesert SA2	-	-	-	-	-
Tamborine – Canungra SA2	-	-	-	-	-
Scenic Rim LGA	111	111	111	111	111
Total Supply					
Boonah SA2	131	242	242	242	242
Beaudesert SA2	227	227	227	227	227
Tamborine – Canungra SA2	38	38	38	38	38
Scenic Rim LGA	396	507	507	507	507
Supply Demand Balance					
Boonah SA2	-31	50	19	-23	-65
Beaudesert SA2	35	-59	-169	-271	-338
Tamborine – Canungra SA2	-125	-152	-179	-201	-219
Scenic Rim LGA	-121	-161	-330	-494	-622

Note: It is assumed that the residential aged care places for the approved developments in Boonah SA2 will become available by 2026; A positive number indicates an oversupply, while a negative number refers to the number of additional places supportable.

Source: Bull & Bear Economics (2022)

At an LGA wide level, Scenic Rim is increasingly undersupplied over the projection period. This undersupply stems from the undersupply present in Tamborine – Canungra SA2 between 2021 and 2041, as well as the undersupply accumulating in Beaudesert SA2 from 2026 onwards and in Boonah SA2 from 2036 onwards. By 2041, the modelled supply balance indicates significant shortfalls in all three SA2s to support additional aged care facilities. However, the analysis clearly identifies that additions to supply in the next 5 to 10 years should be concentrated in Tamborine – Canungra SA2 and Beaudesert SA2 in order to mitigate the immediate undersupply concerns.

6.4 Informal Seniors Living

This assessment has specifically focussed on formalised senior living options (ILUs and residential aged care), however, there are alternatives to providing affordable housing for seniors. These informal facilities could be in the form of community titled developments which are marketed to seniors but do not satisfy the legislative definition of retirement villages or aged care facilities. Typically, in these types of communities, the resident owns their home and pays a site fee to the owner for the land their home occupies and for the upkeep of the communal facilities. Lifestyle Villages are usually marketed to the over 50's and residents live independently, not dependent on staff for assistance.

These kinds of facilities provide informal and compact seniors living options for downsizers and retirees.

Across South East Queensland (SEQ), there are a number of informal seniors living facilities including Maroochy Shores and Twin Cedars (Bli Bli). In these examples, community titled land is marketed to seniors as an affordable alternative to other manufactured home parks, retirement villages or residential aged care programs. Additionally, residents of community titled developments (informal seniors living) can continue to benefit from access to outdoor areas without maintaining the area themselves.

Within Scenic Rim, an example of informal seniors living is Capo di Monte in Tamborine Mountain is a 45-unit facility which offers residents community titled dwellings with all maintenance included in an annual fee. This typology has been successfully delivered in Scenic Rim LGA previously and, as such, is a potential option for diversity in the housing market catering to an ageing population.

6.5 Key Findings

Key findings from this section suggest an oversupply of retirement village ILU approvals in the Boonah SA2 and Tamborine – Canungra SA2s across the projection period. However, there is a shortfall in ILUs and residential aged care units in the Beaudesert SA2 by 2041. At the LGA level, there is a significant oversupply of ILUs from 2026 onwards, suggesting no immediate need to encourage further development of this housing type in the short to medium term.

However, a different scenario is present in the supply demand balance for residential aged care (delivered in a number of beds). This assessment indicates a significant undersupply of aged care beds across all SA2s, and consequently, at the LGA level. The oversupply of ILUs at 2041, compared to the undersupply of residential aged care beds at 2041, suggest that there will be limited high care options for seniors ageing out of independent living. The consequence of which is senior living unassisted for longer than appropriate, or residents of Scenic Rim LGA leaving the region in search of appropriate residential care.

The distribution disparity between ILUs and residential aged care supply in the LGA suggests that in the short to medium term Council should support the development of new facilities focussed on residential aged care. Based on the estimated supply demand balance in 2041, an appropriate location for facilities of this nature would be in the Beaudesert SA2 and the Tamborine-Canungra SA2.

7 Housing Need by Typology

In formulating a methodology for assessing future housing need it was necessary to understand how the existing composition of households by size related to the existing stock of dwellings by size. Any assessment of housing need which aims to address changes in the mix of housing delivered should focus primarily on how households are expected to change over time. This can be achieved having regard to historic trends and demographic projections. It is not appropriate to project changes in the housing stock or how households have been occupying that housing stock, because such an analysis in effect embeds the aforementioned policy challenges (i.e., mismatch in household requirements and the housing stock). Such an exercise can be useful to understand the scope and scale of the policy challenge if 'business as usual' is permitted to run its course but should not be used as anything but a contextual basis for setting policy.

The methodological approach adopted in this housing needs assessment is based on the size of households and the size of dwellings. This approach is preferred over consideration of household composition based on family structure, because it provides a clear understanding of how many people need to be housed. For example, while a couple family without children is clearly a two-person household, a couple family with children could be three or more persons. A group household is largely indeterminate.

7.1 Existing & Projected Housing Need

Census data demonstrates overwhelmingly, average household sizes (persons per dwelling) have fallen sharply over the past 50 years. As a result of a range of factors but chief among those are rising household incomes and access to contraception. More recently, after the wealth effect ran its course during the 1970s and 1980s, rising cost pressures appear to have weighed on birth rates and consequently family size.

The housing needs assessment projects households by size at the Study Area, SA2 and LGA level, meaning that for each area there is a projected number of one person, two-person, three person and four or more person households. These are generated having regard to QGSO population projections (2018) converted to total number of households based on a 2021 average household size and a projected 2041 average household size (typically lower than the 2021 average household size) informed by historical trends and the QGSO 2018 edition of population projections. Notably, the three SA2s within Scenic Rim LGA (Boonah, Beaudesert, and Tamborine – Canungra) align exactly with the LGA boundary. Section 5 details the household projections by Study Area with respect to household composition and size. These household projections were then grouped in three categories, namely:

- + Small Households: one or two person households;
- + Medium Households: three persons households; and
- + Large Households: four or more person households.

Similarly, the 2021 dwelling stock is categorised by dwelling size based on the number of bedrooms as follows:

- + Small Dwelling: one- and two-bedroom dwellings;
- + Medium Dwelling: three bedroom dwellings; and
- + Large Dwelling: four or more bedroom dwellings.

A comparison of 2021 households by size and dwellings by size for each Study Area is made and expressed as a ratio of:

- + Small households to small dwellings;
- + Medium households to medium dwellings; and
- + Large households to large dwellings.

This comparison shows that there are more small households than small dwellings in any given Study Area, while there are usually fewer medium households than medium dwellings and significantly fewer large households than large dwellings. This suggests that to varying degrees the dwelling stock in the designated Study Areas is skewed away from small dwellings towards larger dwellings. The ratios within Scenic Rim LGA range from 0.1 to 12.1 across the projection period, as detailed in Table 7-1 below (e.g., in 2041 there were 3.7 times as many small households as there were small dwellings in Scenic Rim LGA).

Study Areas in which the small dwelling household ratios are anticipated to increase most significantly are:

- + Peak Crossing, in the Boonah SA2, recorded a small household to dwelling ratio in the order of 8.9 as of the latest Census which is anticipated to increase to 12.1 by 2041 based on a continuation of historic trends;
- + Canungra, in the Tamborine – Canungra SA2, recorded a 4.2 small household to small dwelling ratio as of 2021 which is estimated to increase to 5.8 based on the continuation of trends between 2016 and 2021; and
- + Harrisville, in the Boonah SA2, recorded a small household to dwelling ratio of 5.0 in 2021, this ratio is expected to increase to 6.4 by 2041.

At a local government area level, there are over three times as many small households as there are small dwellings in Scenic Rim (according to the 2021 Census). There are less than half as many medium households (three person) households as there are medium dwellings (three bedroom) and half as many large households (four or more persons) as there are large dwellings (four or more-bedroom dwellings). At face value, these ratios tend to suggest that there should be fewer medium and large dwellings and more small dwellings. However, calibrating the market so each ratio is set at 1.0 is ineffective because a household's housing needs can change over the household lifecycle (e.g., a family home might be purchased ahead of children being born). Within Scenic Rim LGA, the baseline ratio demonstrated by the 2021 Census suggest that the existing distribution of small, medium, and large houses is generally reasonable and reflective of planned household lifestyle considerations and general wealth effects.

Table 7-1 below displays the small, medium, and large household to dwelling ratios for the sixteen Study Areas, three SA2s and the broader Scenic Rim LGA as of 2021 and projected to 2041.

Table 7-1 Small, Medium and Large Households to Dwelling Ratio Business as Usual Scenario – Study Areas, SA2s and Scenic Rim LGA, 2021 and 2041

	2021 – Business as Usual			2041 – Business as Usual		
	Small	Medium	Large	Small	Medium	Large
Boonah SA2						
Aratula	5.6	0.2	0.5	4.2	0.2	0.5
Boonah	3.4	0.3	0.5	4.3	0.3	0.2
Harrisville	5.0	0.4	0.8	6.4	0.5	0.7
Kalbar	5.0	0.4	0.8	5.4	0.5	0.8
Mt Alford	3.2	0.2	0.6	4.1	0.1	0.3

	2021 – Business as Usual			2041 – Business as Usual		
	Small	Medium	Large	Small	Medium	Large
Peak Crossing	8.9	0.5	0.7	12.1	0.6	0.7
Roadvale	3.6	0.3	0.8	3.8	0.3	0.7
Warrill View	3.5	0.2	0.6	2.9	0.2	0.7
Balance	3.6	0.3	0.6	3.0	0.2	0.8
Boonah SA2 Total	3.7	0.3	0.6	3.8	0.3	0.6
Beaudesert SA2						
Beaudesert & Gleneagle	3.6	0.4	0.5	3.4	0.4	0.5
Kooralbyn	2.7	0.4	0.4	2.9	0.2	0.3
Rathdowney	3.2	0.4	0.2	3.2	0.4	0.2
Bromelton	4.2	0.5	0.6	4.5	0.5	0.5
Balance	3.6	0.4	0.6	3.9	0.4	0.6
Beaudesert SA2 Total	3.4	0.4	0.5	3.4	0.4	0.5
Tamborine – Canungra SA2						
Beechmont	4.4	0.3	0.5	5.4	0.2	0.4
Canungra	4.2	0.5	0.6	5.8	0.6	0.5
Tamborine	5.4	0.9	0.6	4.9	1.4	0.7
Tamborine Mountain	3.8	0.3	0.6	4.7	0.3	0.6
Balance	3.5	0.4	0.7	2.6	0.4	0.6
Tamborine – Canungra SA2 Total	3.9	0.4	0.6	4.3	0.4	0.6
Scenic Rim LGA	3.7	0.4	0.6	3.7	0.4	0.5

Source: Bull & Bear Economics Analysis (2022)

As mentioned above, small households are one and two person households. These could be a single person family; a couple family without children; a single parent family with one child; or a household of two unrelated persons (e.g., flatmates). Some of these small households might have an absolute need for at least two bedrooms, for example a single parent family with one child or a household of two unrelated persons, while others might only require a single bedroom dwelling (e.g. single person, couple family without children). Relevantly, these households might prefer a spare bedroom whatever their circumstances. For this reason, it is logical that there will always be some imbalance in the number of small households relative to the number of small dwellings (i.e. more small households than small dwellings). However, the policy question is when does that imbalance move from being a manifestation of consumer preference to a structural imbalance in the housing stock. Ultimately, this is a question for policy makers, however this housing needs assessment articulates a set of parameters for consideration about at what point policy intervention might be reasonable.

While the balance of households by size and dwellings by size at the LGA wide level appears reasonable, there are some Study Areas where the imbalance is more pronounced (Peak Crossing, Aratula, and Tamborine for example). In some instances, this imbalance may require policy intervention. An example of this could be in Tamborine, between 2016 and 2021 demographic data shows an increase in the proportion of persons aged 0 to 14 years, suggesting that households in the area are moving through the lifecycle of couples (couples without children, to couples with children, and then, back to couples without children). Over the course of the next 20 years, residents of Tamborine will see downsizing as a relevant consideration as their children move out. This example highlights that in some parts of Scenic Rim intervention is warranted to augment the housing stock by providing more opportunity for smaller dwellings to be delivered and to allow residents to downsize whilst remaining in their local community. These concerns will become increasingly relevant as the Study Areas experience population growth over time.

7.1.1 Study Areas of Concern

As of 2041, any Study Areas with a small household to small dwelling ratio in excess of 3.5, suggests that the area could benefit from some form of intervention. These areas are as follows:

- + Aratula;
- + Boonah;
- + Harrisville;
- + Kalbar;
- + Mt Alford;
- + Peak Crossing;
- + Roadvale;
- + Bromelton;
- + Beechmont;
- + Canungra;
- + Tamborine; and
- + Tamborine Mountain.

This list of study areas of concern is mostly consistent with the results as of the 2016 Census, however we note there is no longer concern for the Rathdowney and Warrill View study areas but a need to intervene in the Roadvale, Boonah and Canungra study areas.

7.2 Policy Intervention

This housing needs assessment sets a range of model 'rules' to demonstrate the effect of escalating intervention to address the imbalance in small households to small dwellings. The rules as they are currently adopted are:

- + SA2s with a ratio of small households to small dwellings is less than 3.5: no change to the incidence of small dwellings as of 2041;
- + SA2s with a ratio of small households to small dwellings of between 3.5 and 7.5: the incidence of small dwellings as of 2041 is increased by 25% relative to 2021 levels (e.g., if 4% of the dwelling stock is small dwellings in 2021, the incidence is increased to 5% of the dwelling stock being small dwellings by 2041);
- + SA2s with a ratio of small households to small dwellings of between 7.5 and 12.5: the incidence of small dwellings as of 2041 is increased by 75% relative to 2021 levels (e.g., if 4% of the dwelling stock is small dwellings in 2021, the incidence is increased to 7% of the dwelling stock being small dwellings by 2041);
- + SA2s with a ratio of small households to small dwellings of between 12.5 and 17.5: the incidence of small dwellings as of 2041 is increased by 150% relative to 2021 levels (e.g., if 4% of the dwelling stock is small dwellings in 2021, the incidence of is increased to 10% of the dwelling stock being small dwellings by 2041); and
- + SA2s with a ratio of small households to small dwellings of greater than 17.5: the incidence of small dwellings as of 2041 is increased by 250% relative to 2021 levels (e.g., if 4% of the dwelling stock is small dwellings in 2021, the incidence is increased to 14% of the dwelling stock being small dwellings by 2041).

While the above interventions might seem significant, the areas with the greatest imbalances are typically where the incidence of small dwellings as a proportion of housing stock is very low, which means actual changes in terms of the number of additional small dwellings will not be as significant.

The policy implication of the above rules as they currently stand is that it is considered reasonable that in some locations there will be four to five times the number of small households as there are small dwellings, or put another way nearly at least three out of five small households will reside in a medium or large dwelling. As already mentioned, the above rules have been adopted for demonstrative purposes and do not reflect the potential impact of land supply constraints. However, based on the nature of the Study Areas being selected as being focus areas for future growth, it is not anticipated that constraints on residential land supply will be a significant concern other than in Kooralbyn, which is unlikely to have sufficient capacity to incorporate modelled dwelling growth due to land constraints.

Table 7-2 below details the adjusted small, medium, and large household to dwelling ratios for the sixteen Study Areas, three SA2s and the broader Scenic Rim LGA as of 2041.

Table 7-2 Small, Medium and Large Household to Dwelling Ratio Policy Intervention Scenario and Business as Usual Scenario – Study Areas, SA2s and Scenic Rim LGA, 2041

	2041 – Business as Usual			2041 – Policy Intervention		
	Small	Medium	Large	Small	Medium	Large
Boonah SA2						
Aratula	4.15	0.23	0.53	3.32	0.24	0.56
Boonah	4.33	0.31	0.18	3.47	0.33	0.19
Harrisville	6.40	0.49	0.66	5.12	0.50	0.67
Kalbar	5.43	0.50	0.81	4.34	0.51	0.82
Mt Alford	4.08	0.09	0.32	3.27	0.10	0.34
Peak Crossing	12.08	0.61	0.72	6.90	0.63	0.73
Roadvale	3.82	0.31	0.73	3.06	0.32	0.77
Warrill View	2.86	0.21	0.74	2.86	0.21	0.74
Boonah SA2 Total	3.79	0.31	0.58	3.03	0.33	0.61
Beaudesert SA2						
Beaudesert and Gleneagle	3.45	0.40	0.54	3.45	0.40	0.54
Kooralbyn	2.87	0.25	0.26	2.87	0.25	0.26
Rathdowney	3.22	0.39	0.24	3.22	0.39	0.24
Bromelton	4.54	0.51	0.53	3.63	0.53	0.54
Beaudesert SA2 Total	3.39	0.38	0.50	3.39	0.38	0.50
Tamborine – Canungra SA2						
Beechmont	5.37	0.24	0.39	4.30	0.25	0.40
Canungra	5.77	0.62	0.45	4.61	0.64	0.47
Tamborine	4.92	1.44	0.65	3.93	1.46	0.66
Tamborine Mountain	4.73	0.30	0.55	3.79	0.31	0.57
Tamborine – Canungra SA2 Total	4.29	0.40	0.56	3.43	0.41	0.59
Scenic Rim LGA	3.68	0.37	0.54	3.30	0.37	0.55

Source: Bull & Bear Economics Analysis (2022)

8 Housing Need Projections

The preceding sections of this analysis demonstrate that in some Study Areas, policy intervention can assist in creating a balanced dwelling supply across Scenic Rim LGA and within the sixteen Study Areas. As such, this assessment has prepared two household need projection scenarios. The first of which is the business-as-usual scenario (i.e. no change in the composition of the housing stock in response to changes in the composition of households) and a policy intervention scenario, whereby the local government implements policies which incentivise certain development types (the impact detailed in Section 7).

8.1 Business as Usual

As previously detailed, under the business-as-usual scenario, total dwellings in Scenic Rim LGA area are anticipated to increase as follows:

- + The number of small dwellings is anticipated to grow from 2,714 dwellings in 2021 to 4,319 by 2041. Almost a third of all small dwellings at 2041 are anticipated to be located in the Beaudesert and Gleneagle Study Area;
- + Medium dwellings in Scenic Rim LGA are expected to increase between 2021 and 2041 from 6,686 dwellings to 10,130 dwellings, with over a quarter to be located in the Beaudesert and Gleneagle Study Area and almost 20.0% of dwellings to be located in the Tamborine Mountain Study Area in 2041;
- + Between 2021 and 2041, large dwellings are expected to increase from 6,700 dwellings to 11,134 dwellings in 2041. The majority of large dwellings are expected to be located in the Beaudesert and Gleneagle Study Area of in the Tamborine Mountain Study Area.

Table 8-1 summarises the business-as-usual dwelling projections for small, medium and large dwellings by Study Area, SA2 and for Scenic Rim LGA.

Table 8-1 Small, Medium and Large Household Dwelling Projections Business-as-Usual Scenario – Study Areas, SA2s and Scenic Rim LGA, 2021 and 2041

	2021 – Current				2041 – Business as Usual			
	Small	Medium	Large	Total	Small	Medium	Large	Total
Boonah								
Aratula	22	84	75	181	33	80	88	202
Boonah	291	651	497	1,439	342	835	687	1,864
Harrisville	15	79	62	156	19	123	116	258
Kalbar	48	205	168	422	71	317	324	712
Mt Alford	40	85	54	178	47	110	65	222
Peak Crossing	8	60	99	167	8	90	172	270
Roadvale	28	87	61	175	35	111	78	223
Warrill View	24	56	45	125	34	66	43	143
Balance	313	761	750	1,824	480	1,031	983	2,493
Boonah SA2 Total	791	2,066	1,811	4,668	1,068	2,763	2,556	6,387
Beaudesert SA2								
Beaudesert and Gleneagle	645	1,449	1,477	3,571	1,288	2,754	3,255	7,297
Kooralbyn	215	264	308	788	596	651	838	2,084
Rathdowney	17	29	25	71	18	29	29	76

	2021 – Current				2041 – Business as Usual			
	Small	Medium	Large	Total	Small	Medium	Large	Total
Bromelton	20	65	66	152	28	99	110	238
Balance	192	442	560	1,195	384	1,086	1,078	2,549
Beautesert SA2 Total	1,089	2,250	2,438	5,777	2,314	4,620	5,309	12,243
Tamborine – Canungra SA2								
Beechmont	33	95	89	218	37	119	119	275
Canungra	75	235	295	605	71	264	431	766
Tamborine	50	158	448	657	40	144	638	822
Tamborine Mountain	533	1,521	1,137	3,190	538	1,859	1,579	3,976
Balance	143	361	483	986	251	360	503	1,114
Tamborine – Canungra SA2 Total	833	2,370	2,452	5,656	937	2,747	3,270	6,953
Scenic Rim LGA	2,714	6,686	6,700	16,100	4,319	10,130	11,134	25,583

Source: Bull & Bear Economics (2022)

8.2 Policy Intervention

The policy intervention scenario demonstrates how government intervention in housing supply can assist in reducing the imbalance between household needs and dwelling supply, as assessed in Section 7.2. Household projections for Scenic Rim as a whole remain consistent with the previous scenario, however, the number of small, medium and large dwellings has been redistributed across the sixteen Study Areas in order to better serve housing need.

Based on the policy intervention 'rules' articulated in Section 7.2, the most significant reallocation of dwellings is evident in the 2041 projections for the Study Areas of Boonah and Tamborine Mountain and is as follows:

- + The Boonah Study Area would host an additional 85 small dwellings, 47 fewer medium dwellings, and 39 fewer large dwellings compared to the business-as-usual scenario; and
- + With policy intervention, the Tamborine Mountain Study Area would need to redistribute 73 medium dwellings and 62 large dwellings to increase the number of small dwellings to 134 dwellings.

Table 8-2 summarises the policy intervention scenario dwellings projections for small, medium and large dwellings by Study Area, SA2 and for Scenic Rim LGA.

Table 8-2 Small, Medium and Large Household Dwelling Projections Policy Intervention Scenario – Study Areas, SA2s and Scenic Rim LGA, 2021 and 2041

	2021 – Current				2041 – Policy Intervention			
	Small	Medium	Large	Total	Small	Medium	Large	Total
Boonah								
Aratula	22	84	75	181	41	76	84	202
Boonah	291	651	497	1,439	427	788	648	1,864
Harrisville	15	79	62	156	24	121	113	258
Kalbar	48	205	168	422	89	308	315	712
Mt Alford	40	85	54	178	58	103	60	222
Peak Crossing	8	60	99	167	13	89	168	270
Roadvale	28	87	61	175	43	106	74	223
Warrill View	24	56	45	125	34	66	43	143

	2021 – Current				2041 – Policy Intervention			
	Small	Medium	Large	Total	Small	Medium	Large	Total
Balance	313	761	750	1,824	604	968	920	2,493
Boonah SA2 Total	791	2,066	1,811	4,668	1,335	2,625	2,427	6,387
Beaudesert SA2								
Beaudesert and Gleneagle	645	1,449	1,477	3,571	1,288	2,754	3,255	7,297
Kooralbyn	215	264	308	788	596	651	838	2,084
Rathdowney	17	29	25	71	18	29	29	76
Bromelton	20	65	66	152	36	96	106	238
Balance	192	442	560	1,195	377	1,090	1,082	2,549
Beaudesert SA2 Total	1,089	2,250	2,438	5,777	2,314	4,620	5,309	12,243
Tamborine – Canungra SA2								
Beechmont	33	95	89	218	47	115	114	275
Canungra	75	235	295	605	88	257	420	766
Tamborine	50	158	448	657	51	142	629	822
Tamborine Mountain	533	1,521	1,137	3,190	672	1,787	1,518	3,976
Balance	143	361	483	986	313	339	461	1,114
Tamborine – Canungra SA2 Total	833	2,370	2,452	5,656	1,171	2,640	3,142	6,953
Scenic Rim LGA	2,714	6,686	6,700	16,100	4,820	9,885	10,879	25,583

Source: Bull & Bear Economics (2022)

9 Other Considerations

The focus of this chapter is to provide an overview of the demand for and supply of affordable housing within Scenic Rim. This chapter has relied on data from a number of data sources and provides commentary on the following:

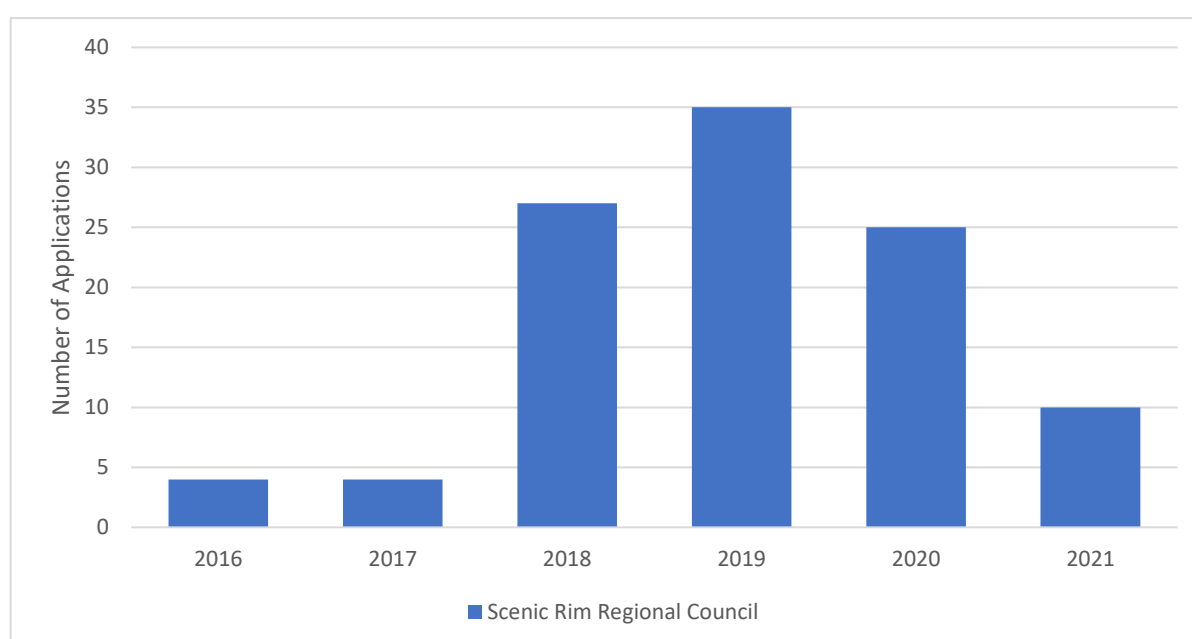
- + Social housing register statistics, based on data published on the Queensland Government Open Data Portal;
- + Households assisted by the National Rental Affordability Scheme, based on data published on the Queensland Government Open Data portal;
- + Estimates of the homelessness rate within Scenic Rim LGA compared to surrounding LGAs, based on data published by Regional Development Australia; and
- + Supply of affordable rental dwellings (both social housing and rental properties provided by a state/territory provider), based on data published in the 2016 and 2021 Censuses of Population and Housing.

9.1 Social Housing Register

Housing affordability is a key factor when considering housing need. As such, social housing demand in Scenic Rim LGA has been examined. The latest edition of the social housing register provided by the Queensland Government (2021), identified 105 applications seeking community housing within Scenic Rim LGA were lodged between 2016 and 2021. The number of applications increased significantly between 2018 and 2020, peaking at 35 applications lodged in 2019, but the number of applications lodged has since been on the decline. In 2021, ten applications for social housing within Scenic Rim LGA were lodged.

Figure 9-1 summarises the number of applications for social housing within Scenic Rim LGA between 2016 and 2021.

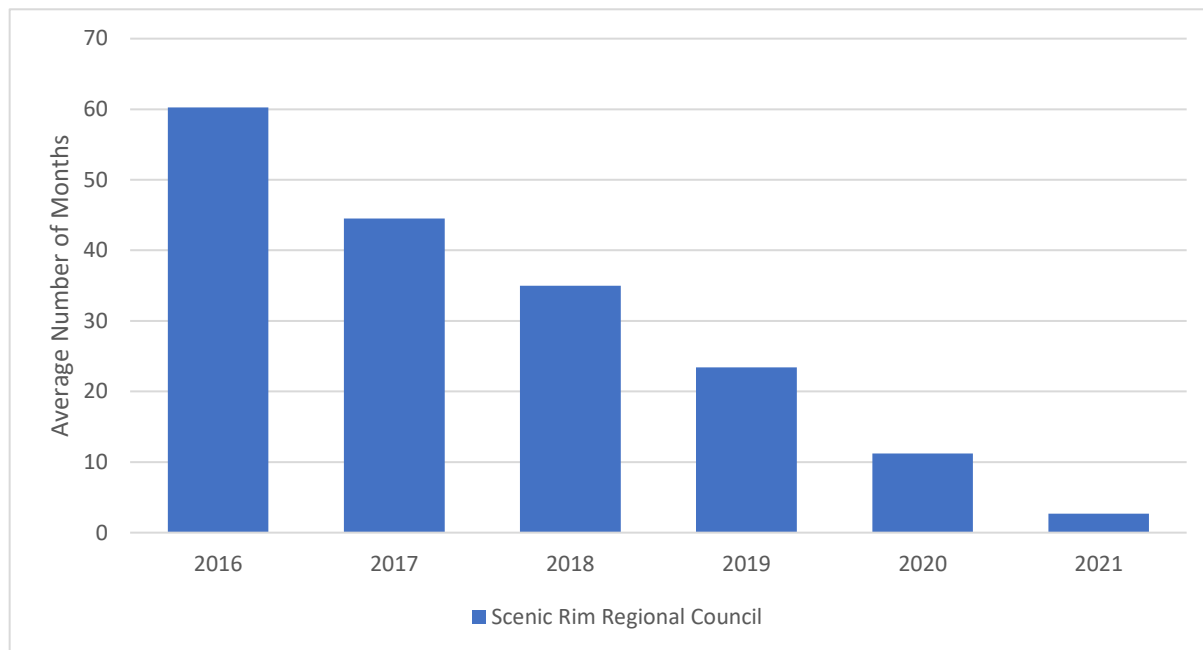
Figure 9-1 Number of Social Housing Applications – Scenic Rim LGA, 2016 to 2021



Source: Queensland Government Social Housing Register (2021)

Over the past five years, the average time applicants have spent seeking social housing on the social housing register has consistently decreased, as illustrated by Figure 9-2. In 2016, the average time spent on the social housing register was 60.25 months (or approximately five years); however, in 2021, the average time decreased significantly to an average of 2.7 months.

Figure 9-2 Average Number of Months Spent on Social Housing Register – Scenic Rim LGA, 2016 to 2021

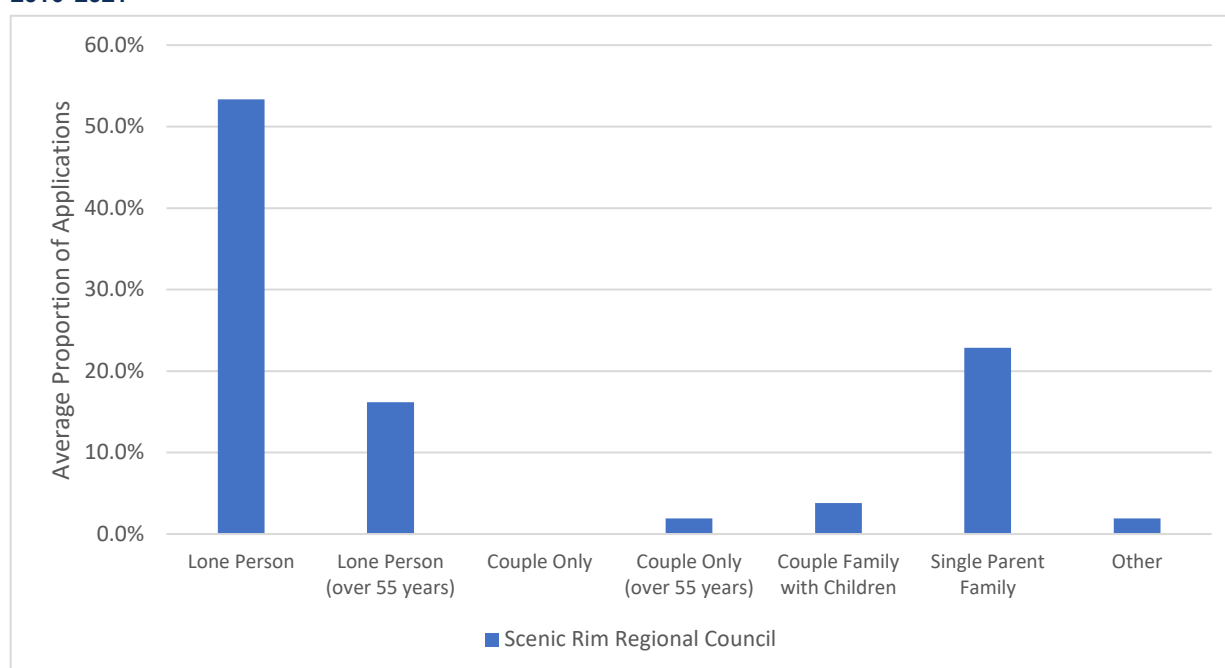


Source: Queensland Government Social Housing Register (2021)

On average, over the past five years 53.3% of applications were for lone persons, while a further 16.2% of applications were for lone persons over 55 years. Single parent families were another significant cohort of applicants, with an average of 22.9% of applications indicating a single parent family.

Figure 9-3 details the average distribution between 2016 and 2021 of social housing applications by household type for Scenic Rim Regional Council.

Figure 9-3 Household Type as a Proportion of Social Housing Applications – Scenic Rim Regional Council, 2016-2021



Source: Queensland Government Social Housing Register (2021)

Applications are flagged within the Social Housing Register for particular circumstances, such as for applicants requiring specific modification to social housing based on their disability. Between 2016 and 2021, within Scenic Rim LGA 28.6% of applicants required modification due to disability, while 60.0% of applicants in total were disabled. Notably, almost half of applicants were homeless, while 27.6% of applicants were of Indigenous heritage.

Table 9-1 outlines the applications flagged in the Social Housing Register as a proportion of total applications lodged within Scenic Rim LGA between 2016 and 2021.

Table 9-1 Flagged Applications – Scenic Rim LGA, 2016 to 2021

	Proportion of Total Applications
Disability Modification	28.6%
Homelessness Flag	48.6%
Disability Application	60.0%
Indigenous Application	27.6%

Source: Queensland Government Social Housing Register (2021)

9.2 National Rental Affordability Scheme

The National Rental Affordability Scheme (NRAS) is an Australian Government affordable housing initiative which aims to increase the supply of new and affordable rental dwellings by providing an annual financial incentive to housing providers for up to ten years. An NRAS dwelling is rented out at least 20 per cent below market rates.

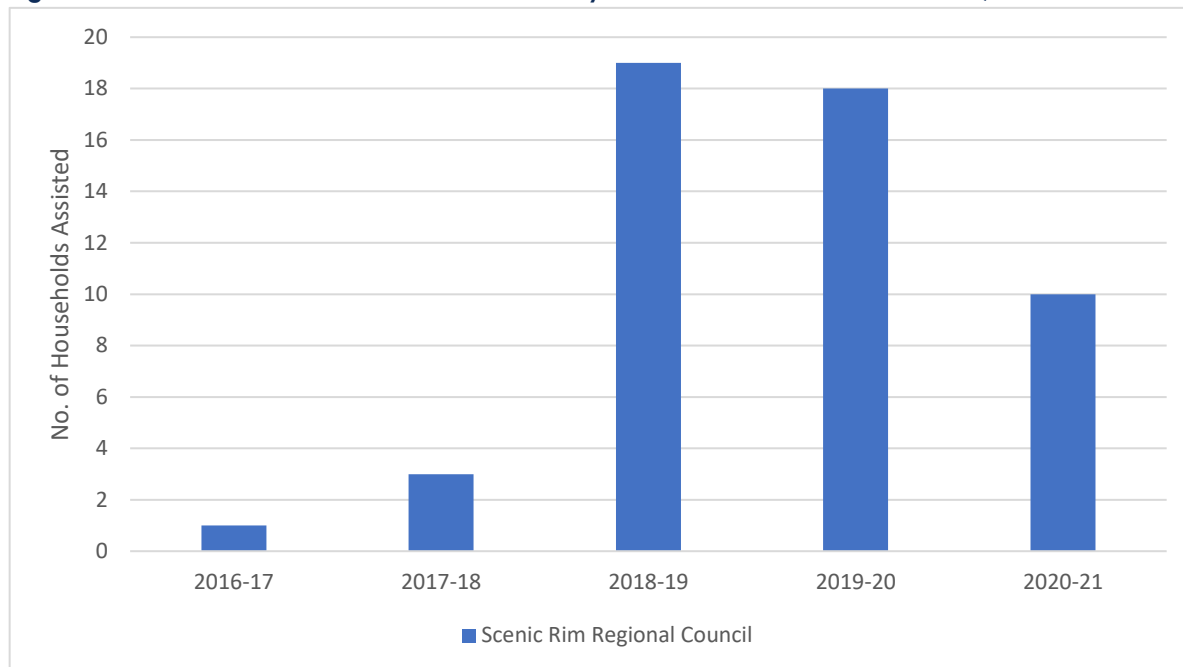
The number of households assisted by the NRAS will fall over time, to reflect that no new allocations were granted as of 1 April 2020, with existing allocations to be exhausted by 30 June 2026.

Between 2016 -17 and 2020-21, 51 households within Scenic Rim LGA were assisted by the NRAS initiative. The number of households assisted was highest in 2018-19 at 19 households, however this

figure has since been on the decline. Over this period, 45.1% of households assisted were single parent families, while a further 25.5% of households assisted were lone person households.

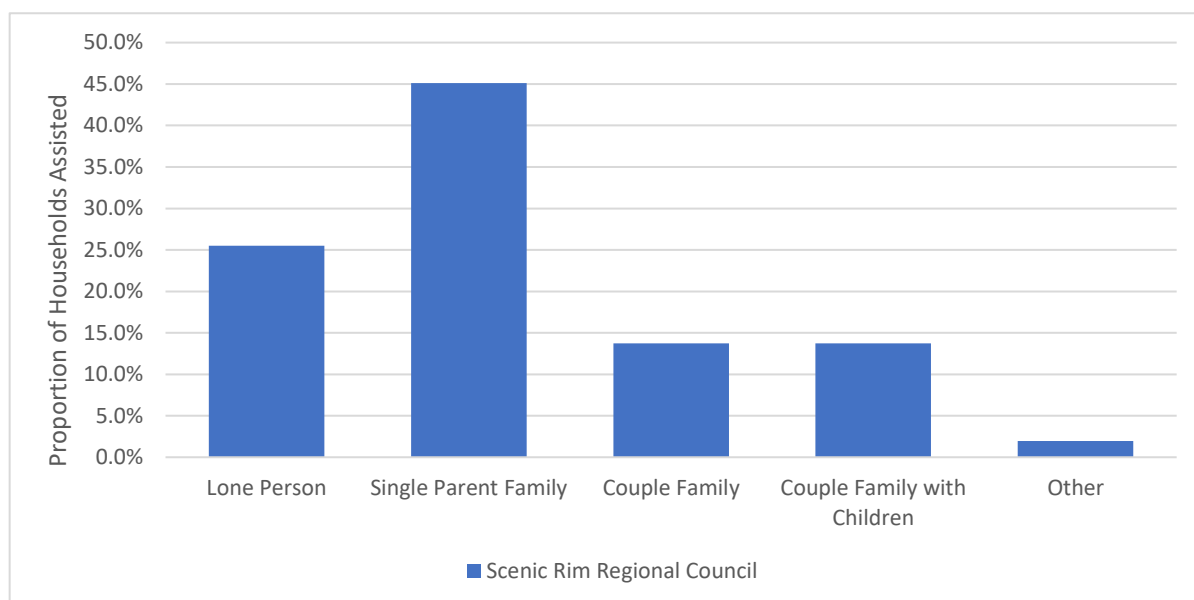
Figure 9-4 illustrates the number of households assisted by the NRAS initiative in Scenic Rim LGA while Figure 9-5 illustrates the total proportion of households assisted by the NRAS initiative by household type between 2016 and 2021.

Figure 9-4 Number of Households Assisted by NRAS Initiative – Scenic Rim LGA, 2016 to 2021



Source: Queensland Government National Rental Affordability Scheme (NRAS) (2017-2021)

Figure 9-5 Proportion of Households Assisted by NRAS Initiative by Household Type – Scenic Rim LGA, 2016 to 2021



Source: Queensland Government National Rental Affordability Scheme (NRAS) (2017-2021)

9.3 Homelessness

The definition of homelessness varies by research entity. The ABS statistical definition of homelessness comprises the following sub-categories:

- + Persons living in improvised dwellings, tents or sleeping out;
- + Persons in supported accommodation for the homeless;
- + Persons staying temporarily with other households;
- + Persons living in boarding houses;
- + Persons in other temporary lodging; and
- + Persons living in 'severely' crowded dwellings (i.e. usual residents of dwellings which needed four or more extra bedrooms to accommodate them adequately).

On the other hand, the Specialist Homelessness Service (SHS) data reports data on specialist support provided to Australians currently already homeless or at risk of homelessness. For the purposes of this dataset, a person is considered homeless if they are living in non-conventional accommodation (e.g. living on the street) or in short-term or emergency accommodation (e.g. temporarily living with friends or relatives).

Data on homeless is typically not published at a small area level and is available at the SA3 / SA4 level. However, our desktop review identified estimates of homelessness by Regional Development Australia Ipswich & West Moreton Inc. (2022), however it is unclear regarding the timing or methodology applied to derive these estimates.

Regional Development Australia Ipswich & West Moreton Inc (2022) reported the homeless rate for the local government areas comprising the Ipswich & West Moreton region, listed in Table 9-3 below. Based on this data, Scenic Rim LGA has the lowest homeless rate of the Ipswich & West Moreton Region, with a homelessness figure of 20.9 people for every 10,000 residents. Comparatively, the highest homeless rate was recorded in the Lockyer Valley LGA (43.8 people per 10,000 residents), while the next lowest rate of homelessness was recorded in Ipswich LGA (35.4 people for every 10,000 residents).

Table 9-2 details the homeless rate for the LGAs of the Ipswich & West Moreton region per 10,000 residents.

Table 9-2 Homeless Rate – Ipswich & West Moreton

Region	Homeless Rate (per 10,000 persons)
Ipswich LGA	35.4
Lockyer Valley LGA	43.8
Scenic Rim LGA	20.9
Somerset LGA	39.6
Ipswich & West Moreton	34.8

Note: This data has been sourced from Regional Development Australia Ipswich & West Moreton Inc.
Source: Regional Development Australia Ipswich & West Moreton Inc.

9.4 Supply of Rental Dwellings from State/Territory Housing Authority or Community Housing Provider

The 2021 Census of Population and Housing published data regarding the tenure and landlord type by dwelling structure. For the purposes of this assessment, affordable rental dwellings include occupied rented dwellings within the following sub-categories:

- + Dwellings rented from a State or territory housing authority;
- + Dwellings rented from a community housing provider.

The data highlights that whilst the quantum of housing stock rented from a state or territory housing provider has decreased, there has been a corresponding increase in the quantum of housing stock rented from a community housing provider. However, the incidence of rental housing from these providers has declined in all areas analysed, with the exception of Boonah SA2.

The incidence of dwellings being rented from a state/territory housing authority or community housing provider within Scenic Rim has been significantly lower than the state average, with product concentrated within Beaudesert SA2.

Table 9-3 details the change in the supply of rental dwellings from a state/territory housing authority or community housing provider within Scenic Rim, benchmarked to Queensland, as of the 2016 and 2021 Censuses of Population and Housing.

Table 9-3 Supply of Rental Dwellings from State/Territory Housing Authority or Community Housing Provider, 2016 and 2021 Censuses

	Number		% of Total	
	2016	2021	2016	2021
State or Territory Housing Authority (occupied private dwellings)				
Boonah SA2	6	13	0.1%	0.3%
Beaudesert SA2	132	114	2.7%	2.1%
Tamborine - Canungra SA2	3	0	0.1%	0.0%
Scenic Rim LGA	144	125	1.0%	0.8%
Queensland	52,858	50,230	3.2%	2.7%
Community Housing Provider (occupied private dwellings)				
Boonah SA2	3	4	0.1%	0.1%
Beaudesert SA2	36	43	0.7%	0.8%
Tamborine - Canungra SA2	4	0	0.1%	0.0%
Scenic Rim LGA	40	43	0.3%	0.3%
Queensland	8,675	11,047	0.5%	0.6%

Note: Numbers may not add due to rounding by the ABS to confidentialise data.

Source: Australian Bureau of Statistics Census of Population and Housing (2016 & 2021)

9.5 Implications for Scenic Rim LGA

Scenic Rim LGA has seen a decrease in social housing demand over the past five years. The number of social housing applications has been on the decline since 2019, while the average time spent on the register has been decreasing consistently since 2016. Significantly, 60.0% of applicants for social housing in Scenic Rim LGA reported having a disability while 48.6% of applicants were homeless.

Notably, the most common household type of applicants were lone person households and single parent families. Both of these household types are projected to record strong growth between 2021 and 2041 across Scenic Rim LGA, with lone person households anticipated to grow at an average of 3.0% per annum and single parent families at average of 2.2% per annum.

The number of households within Scenic Rim LGA receiving assistance from the NRAS initiative has decreased since 2019. Of the households assisted by the scheme, 45.1% of households were single parent families, while 25.5% of households were lone person households.

Since 2016, the proportion of dwellings provided by a state/territory housing authority or community housing provider has fallen within the Scenic Rim, consistent with the trend in Queensland. The data indicates that the majority of these affordable rental dwellings are provided within Beaudesert SA2. The incidence of dwellings provided by a state/territory housing authority or community housing provider in Scenic Rim is significantly lower than in Queensland.

It is evident that Scenic Rim LGA has seen a decline in the demand for social housing and in households receiving housing assistance. These factors complement the low homeless rate recorded in Scenic Rim LGA as reported by the Regional Development Australia Ipswich & West Moreton Inc, which concludes that Scenic Rim LGA has the lowest homeless rate of the LGAs in the region.

Together, the factors discussed throughout this section indicate that while social housing is not currently a major issue for Scenic Rim LGA, there is still some degree of need to address housing affordability in the region. Additionally, given the ageing of the population of Scenic Rim, it is imperative to ensure that affordable housing is designed to be accessible where possible, to reflect that residents can need disability access or modifications in their dwelling.

Interestingly, further review of the types of affordable dwellings provided by community housing providers indicates a clear shift towards semi-detached housing in Scenic Rim, likely reflective of the fact that social housing is typically sought after by single person households or single parent families, who typically require low maintenance living. The shift has been less evident for stock provided by state/territory agencies. In Queensland, whilst stock provided by state/territory housing authorities is typically separate houses, there is a more dispersed offering from community housing providers.

Table 9-4 outlines the distribution of housing stock provided by state/territory housing providers and community housing providers in Scenic Rim and Queensland as of the 2016 and 2021 Censuses of Population and Housing

Table 9-4 Distribution of Housing Stock Provided by State/Territory Housing Providers and Community Housing Providers, 2016 and 2021

	Scenic Rim LGA		Queensland	
	2016	2021	2016	2021
State or Territory Housing Authority (% of housing stock)				
Separate House	65.3%	65.6%	51.6%	51.1%
Semi-Detached Housing	34.7%	36.0%	23.1%	24.6%
Flat or Apartment	0.0%	0.0%	24.8%	24.0%
Other Dwellings	0.0%	0.0%	0.2%	0.1%
Community Housing Provider (% of housing stock)				
Separate House	57.5%	48.8%	32.9%	35.8%
Semi-Detached Housing	45.0%	53.5%	32.4%	30.4%
Flat or Apartment	0.0%	0.0%	33.3%	32.8%
Other Dwellings	0.0%	0.0%	0.4%	0.3%

Source: Australian Bureau of Statistics Census of Population and Housing (2016 & 2021)

In terms of housing affordability, the trend away from separate dwellings towards semi-detached housing is beneficial for Scenic Rim LGA. Living in a separate house is costlier to maintain when compared with living in attached dwellings. Separate housing also requires more space. Hence, in terms of housing affordability, attached dwellings offer a cheaper alternative and also permits a higher density of dwellings to be built to address those seeking affordable housing. Moreover, as Section 5.3 highlights, households are projected to decrease in size, suggesting that greater attention should be given to the small dwelling stock of Scenic Rim LGA.

Furthermore, as discussed previously, the most significant cohorts requiring social housing are the lone and single parent households. Data regarding the age distribution of persons residing in rental housing provided by a state/territory housing authority or community housing provider is available only from the 2016 Census, with 2021 Census data yet to be released. However, this data clearly illustrates that persons in housing provided by a state/territory housing authority or community housing provider are typically part of a family unit or in the 55+ year age cohort.

Together, the high proportion of older persons residing in social housing and the trend of Scenic Rim LGA's ageing population suggests that further consideration must be given to housing affordability for the older population, especially considering that there are limited options for older people who do not require high level care, nor have the discretionary income to live in retirement villages. It is imperative to also ensure that affordable housing is accessible, to reflect that residents can need disability access in their dwelling.

In 2021, the distribution of dwellings in Scenic Rim LGA is largely skewed towards medium and large dwellings and this trend is anticipated to continue until 2041 under the business-as-usual scenario, as outlined in Section 8.1. However, due to the growing ageing population and the anticipated growth in small households over the projection period, it would be beneficial to increase the number of small dwellings in Scenic Rim LGA so as to provide more affordable housing options for the elderly, as well as single parent families.

10 Recommendations

The rural character of Scenic Rim LGA means that medium or high-rise multi-unit product is not anticipated to play a significant role in the region's medium to long term future. Section 3.2 of this report outlines that there have been very limited development applications and approvals for attached dwelling product other than in Beaudesert SA2 over the past eleven years. Further review of the 2021 Census data also confirms that the attached dwelling stock delivered within Scenic Rim is predominantly semi-detached (e.g. townhouses or dual occupancies). Of the very few flats or apartments identified within Scenic Rim, the majority were either delivered in a one or two storey block or attached to a house (e.g. secondary dwelling).

Whilst the planning scheme does not discourage these uses, there are a range of market factors at play which do not make medium or high rise multi-unit product a viable development option in Scenic Rim at this point in time. Whilst the construction cost of medium or high rise multi-unit product does not vary considerably across South East Queensland, the sale price for this product varies significantly, with the median house price for a three bedroom dwelling typically acting as a ceiling for the maximum sale price for attached product. In the Scenic Rim context, this has meant that at present, there is insufficient return for a prospective developer to make delivery of medium or high rise multi-unit product feasible.

Between the 2016 and 2021 Census, there has been a shift in the delivery of social housing from detached dwellings to semi-attached dwellings in Scenic Rim. This is reflective of demand for this product type being driven by lone person households, followed by single parent families. The incidence of dwellings that are classified as social housing has decreased between the 2016 and 2021 Censuses, from 1.3% of the housing stock in 2016 to 1.1% of the housing stock in 2021. Over this period, there has been a decline in both social housing wait times and applications, suggestive of a relative balance between supply and demand within the Scenic Rim market.

If it is assumed that social housing remains at 1.1% of the dwelling stock in Scenic Rim⁴, this translates to the need for an additional 111 social housing dwellings in the 2021 to 2041 period. It is anticipated that additional social housing is best delivered within the Beaudesert SA2, ideally in a centralised location in proximity to services and access to employment opportunities.

How and in what form additional dwellings can be delivered will be influenced by location, population density and consumer preferences. As previously detailed, while the balance of households by size and dwellings by size at an LGA-wide level appears reasonable, there are some Study Areas where the imbalance is more pronounced and could in fact benefit from some policy intervention to ensure a diverse housing offering in the future, including the provision of accessible housing to support an ageing population and those with disabilities.

Under the business-as-usual scenario detailed in Table 8-1, by 2041 the imbalance between small households and small dwellings is anticipated to be largest in:

- + Peak Crossing;
- + Aratula;
- + Tamborine;

⁴ Social housing comprises housing provided by a state/territory authority plus housing provided by a community housing provider.

- + Kalbar; and
- + Harrisville.

In terms of additional dwelling growth between 2021 and 2041, the largest growth areas are projected as follows:

- + Boonah SA2:
 - Boonah: 425 dwellings (4.5% of total dwelling growth between 2021 and 2041);
 - Kalbar: 290 dwellings (3.0% of total dwelling growth between 2021 and 2041);
- + Beaudesert SA2:
 - Beaudesert & Gleneagle: 3,725 dwellings (39.3% of total dwelling growth between 2021 and 2041);
 - Kooralbyn: 1,296 dwellings (13.7% of total dwelling growth between 2021 and 2041);
- + Tamborine – Canungra SA2:
 - Tamborine Mountain: 786 dwellings (8.3% of total dwelling growth between 2021 and 2041); and
 - Tamborine: 166 dwellings (1.8% of total dwelling growth between 2021 and 2041).

An increasing small household to small dwelling ratio over the projection period demonstrates that the following Study Areas could benefit from the introduction of more compact housing options:

- + Aratula;
- + Boonah;
- + Harrisville;
- + Kalbar;
- + Mt Alford;
- + Peak Crossing;
- + Roadvale;
- + Bromelton;
- + Beechmont;
- + Canungra;
- + Tamborine; and
- + Tamborine Mountain.

Notably, the demographic profile of Scenic Rim LGA compared to Queensland demonstrates that the area as a whole is generally more affordable than the State average (with respect to the proportion of household income spent on housing costs). However, the Beaudesert and Gleneagle, Beechmont, Canungra and Tamborine Study Areas demonstrated average housing costs (as a proportion of household income) above the average for the State (14.2% of household income). Implementing other compact housing typologies in areas which demonstrate a high small household to small dwelling ratios could also assist in maintaining affordable housing options across the Study Areas and in the LGA more broadly.

Historically, a prominent recommendation for growth management planning is to implement minimum lot size requirements across the LGA. The sales volume data by lot size presented in Section 5.3 demonstrates that over the past decade, vacant residential land within the 600 square metres to 800 square metres category was more popular than smaller lots (400 square metres to 600 square

metres) in Scenic Rim LGA. Therefore, a minimum lot size in the order of 600 square metres would be a reasonable intervention. However, implementing a minimum lot size in the order of 600 square metres could deter future compact development within the LGA. As such, were a minimum lot size of 600 square metres to be implemented, it would need to be regularly reviewed.

Therefore, in order to address emerging demographic trends and encourage the supply of small dwellings in the future, a minimum lot size of 400 square metres to 600 square metres is suggested. Additionally, encouraging a more compact urban form (smaller lots, shared amenities or townhouse style development) will also contribute to improving housing affordability across the LGA.

With respect to ILUs and residential aged care facilities in the region, the recommendation is to consider encouraging further development of residential aged care facilities, particularly within the Beaudesert SA2. However, it is recommended that there is no need to facilitate the development of further ILUs in the short to medium term.

The high proportion of older persons residing in social housing and the trend of Scenic Rim LGA's ageing population suggests that further consideration must be given to housing affordability for the older population, especially considering that there are limited options for older people who do not require high level care, nor have the discretionary income to live in retirement villages. It is imperative to also ensure that affordable housing is accessible, to reflect that residents can need disability access in their dwelling.

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Appendix A: Study Area Definitions

Table 0-1 Concordance of Study Areas to SA1s

Study Area	2021 Census SA1s
Aratula	31002127734
	31101130501
Beaudesert & Gleneagle	31101130502
	31101130503
	31101130504
	31101130505
	31101130506
	31101130507
	31101130508
	31101130509
	31101130536
	31101130538
	31101130542
	31101130539
	31101130541
	31101130512
	31101130513
	31101130515
	31101130537
	31101130524
	31101130531
	31101130532
31101130533	
31101130534	
Beechmont	30904124240
	30904124210
	30904124241
Boonah	31002127705
	31002127706
	31002127708
	31002127715
	31002127716
	31002127731
	31002127733
	31002127735
Bromelton	31101130518
	31002127729
Canungra	30904124205
	30904124220

Study Area	2021 Census SA1s
	30904124221
	30904124222
Harrisville	31002127722
Kalbar	31002127701
	31002127702
	31002127730
Kooralbyn	31101130520
	31101130521
	31101130530
Mt Alford	31002127710
Peak Crossing	31002127726
Rathdowney	31101130525
Roadvale	31002127718
Tamborine	30904124237
	30904124236
	30904124232
	30904124230
	30904124201
Tamborine Mountain	30904124206
	30904124207
	30904124208
	30904124213
	30904124214
	30904124215
	30904124216
	30904124217
	30904124218
	30904124227
	30904124228
	30904124229
	30904124231
	30904124233
	30904124234
30904124235	
30904124238	
30904124239	
Warrill View	31002127724

Appendix B: Household Composition

Table 0-1 Family Composition of Households (%) – Study Areas and SA2s, 2016

	Couple family with no children	Couple family with children	One Parent Family	Other Family	Lone Person Households	Group Households	Other Households
Boonah SA2							
Aratula	33.2%	31.7%	9.6%	1.4%	18.8%	1.9%	3.4%
Boonah	32.5%	24.4%	9.7%	0.9%	27.9%	2.7%	2.0%
Harrisville	28.7%	34.8%	17.7%	3.0%	12.8%	0.0%	3.0%
Kalbar	31.3%	31.8%	13.7%	0.8%	18.9%	1.6%	1.8%
Mt Alford	36.4%	34.3%	8.6%	0.0%	18.6%	2.1%	0.0%
Peak Crossing	26.8%	45.1%	9.2%	0.0%	14.8%	2.1%	2.1%
Roadvale	39.8%	35.4%	10.6%	0.0%	14.3%	0.0%	0.0%
Warrill View	28.4%	46.8%	7.3%	0.0%	14.7%	0.0%	2.8%
Balance							
Boonah SA2 Total	35.8%	31.0%	8.7%	0.7%	21.7%	2.1%	0.0%
Beaudesert SA2							
Beaudesert & Gleneagle	26.0%	28.9%	16.1%	1.1%	23.5%	2.1%	2.3%
Kooralbyn	36.4%	20.7%	16.0%	0.0%	21.2%	4.0%	1.7%
Rathdowney	18.9%	27.0%	16.2%	4.1%	23.0%	10.8%	0.0%
Bromelton	34.7%	31.3%	10.9%	0.0%	15.6%	2.7%	4.8%
Balance							
Beaudesert SA2 Total	29.2%	28.0%	14.1%	1.2%	24.4%	2.9%	0.0%
Tamborine – Canungra SA2							
Beechmont	33.0%	33.5%	17.7%	0.0%	14.3%	0.0%	1.5%
Canungra	29.7%	38.0%	11.0%	0.0%	17.5%	2.8%	1.1%
Tamborine	33.7%	42.4%	9.5%	0.9%	9.4%	1.4%	2.7%
Tamborine Mountain	37.0%	26.3%	11.6%	0.3%	21.1%	2.7%	1.0%
Balance							
Tamborine – Canungra SA2 Total	35.1%	32.3%	9.5%	0.5%	19.9%	2.7%	0.0%

Source: ABS Census of Population and Housing (2016)

Table 0-2 Family Composition of Households (%) – Study Areas and SA2s, 2021

	Couple family with no children	Couple family with children	One Parent Family	Other Family	Lone Person Households	Group Households	Other Households
Boonah SA2							
Aratula	38.9%	27.4%	9.5%	0.0%	24.2%	0.0%	0.0%
Boonah	36.1%	22.3%	10.8%	0.2%	27.5%	3.0%	0.0%
Harrisville	28.9%	39.8%	13.3%	0.0%	14.5%	3.6%	0.0%
Kalbar	33.6%	30.5%	12.3%	0.0%	21.3%	2.2%	0.0%
Mt Alford	42.7%	23.2%	6.7%	0.0%	25.0%	2.4%	0.0%
Peak Crossing	33.1%	44.2%	13.0%	0.0%	9.7%	0.0%	0.0%
Roadvale	35.9%	39.1%	4.9%	2.2%	16.3%	1.6%	0.0%
Warrill View	39.6%	29.7%	10.9%	0.0%	19.8%	0.0%	0.0%
Balance							
Boonah SA2 Total	37.3%	28.8%	9.5%	0.5%	21.7%	2.2%	0.0%
Beaudesert SA2							
Beaudesert & Gleneagle	27.6%	23.2%	16.6%	1.2%	29.1%	2.3%	0.0%
Kooralbyn	39.1%	18.1%	9.3%	1.0%	29.9%	2.5%	0.0%
Rathdowney	26.8%	19.7%	11.3%	0.0%	38.0%	4.2%	0.0%
Bromelton	40.0%	37.8%	6.7%	0.0%	15.6%	0.0%	0.0%
Balance							
Beaudesert SA2 Total	30.6%	24.6%	14.2%	1.2%	26.7%	2.6%	0.0%
Tamborine – Canungra SA2							
Beechmont	41.2%	26.9%	9.3%	0.0%	19.0%	3.7%	0.0%
Canungra	30.0%	39.1%	10.5%	0.6%	16.9%	2.9%	0.0%
Tamborine	30.7%	46.2%	10.4%	0.9%	9.2%	2.6%	0.0%
Tamborine Mountain	36.6%	28.5%	9.7%	0.4%	21.7%	3.1%	0.0%
Balance							
Tamborine – Canungra SA2 Total	34.8%	33.7%	9.8%	0.7%	18.4%	2.7%	0.0%

Source: ABS Census of Population and Housing (2022)

Table 0-3 Number of Persons per Household (%) – Study Areas and SA2s, 2016

	One Person	Two Person	Three Person	Four Person	Five Person	Six or more Person	Total Families
Boonah SA2							
Aratula	21.2%	38.0%	17.4%	12.0%	8.2%	3.3%	100.0%
Boonah	30.1%	37.6%	11.1%	11.5%	6.1%	3.5%	100.0%
Harrisville	11.9%	41.5%	12.6%	16.3%	12.6%	5.2%	100.0%
Kalbar	11.9%	41.5%	12.6%	16.3%	12.6%	5.2%	100.0%
Mt Alford	23.0%	41.5%	11.9%	19.3%	2.2%	2.2%	100.0%
Peak Crossing	15.2%	30.3%	17.4%	21.2%	11.4%	4.5%	100.0%
Roadvale	17.0%	44.0%	10.7%	14.5%	9.4%	4.4%	100.0%
Warrill View	21.0%	32.0%	13.0%	19.0%	8.0%	7.0%	100.0%
Balance							
Boonah SA2 Total	21.7%	40.3%	13.7%	13.8%	6.8%	3.8%	100.0%
Beaudesert SA2							
Beaudesert & Gleneagle	25.6%	33.0%	16.1%	13.8%	7.4%	4.1%	100.0%
Kooralbyn	24.2%	45.5%	13.6%	9.2%	4.8%	2.8%	100.0%
Rathdowney	24.3%	35.7%	20.0%	14.3%	0.0%	5.7%	100.0%
Bromelton	20.0%	43.3%	14.2%	13.3%	6.7%	2.5%	100.0%
Balance							
Beaudesert SA2 Total	24.4%	36.1%	15.1%	13.7%	6.1%	4.5%	100.0%
Tamborine – Canungra SA2							
Beechmont	17.4%	37.5%	16.3%	16.3%	8.7%	3.8%	100.0%
Canungra	19.2%	34.7%	16.1%	17.5%	8.6%	3.8%	100.0%
Tamborine	10.4%	40.3%	15.9%	18.2%	8.8%	6.4%	100.0%
Tamborine Mountain	23.6%	43.6%	13.9%	12.1%	5.4%	1.3%	100.0%
Balance							
Tamborine – Canungra SA2 Total	19.9%	39.7%	15.1%	15.2%	6.6%	3.4%	100.0%

Source: ABS Census of Population and Housing (2016)

Table 0-4 Number of Persons per Household (%) – Study Areas and SA2s, 2021

	One Person	Two Person	Three Person	Four Person	Five Person	Six or more Person	Total Families
Boonah SA2							
Aratula	24.0%	43.8%	9.9%	10.4%	6.8%	5.2%	100.0%
Boonah	27.5%	41.6%	13.3%	9.9%	5.2%	2.3%	100.0%
Harrisville	14.7%	35.0%	19.0%	20.2%	6.7%	4.3%	100.0%
Kalbar	14.7%	35.0%	19.0%	20.2%	6.7%	4.3%	100.0%
Mt Alford	25.0%	45.7%	9.8%	9.8%	3.7%	6.1%	100.0%
Peak Crossing	9.3%	35.2%	16.7%	21.6%	10.5%	6.8%	100.0%
Roadvale	16.7%	40.0%	14.4%	14.4%	9.4%	5.0%	100.0%
Warrill View	19.6%	48.0%	9.8%	13.7%	3.9%	4.9%	100.0%
Balance							
Boonah SA2 Total	21.6%	41.7%	13.5%	12.9%	6.5%	3.8%	100.0%
Beaudesert SA2							
Beaudesert & Gleneagle	28.8%	35.5%	14.5%	11.5%	6.2%	3.6%	100.0%
Kooralbyn	30.2%	43.1%	12.5%	7.5%	3.1%	3.5%	100.0%
Rathdowney	39.1%	37.7%	15.9%	0.0%	0.0%	7.2%	100.0%
Bromelton	15.0%	39.3%	21.4%	14.3%	5.0%	5.0%	100.0%
Balance							
Beaudesert SA2 Total	26.8%	37.3%	14.3%	11.8%	5.8%	4.1%	100.0%
Tamborine – Canungra SA2							
Beechmont	20.2%	46.3%	12.8%	12.8%	7.9%	0.0%	100.0%
Canungra	16.8%	35.4%	19.2%	16.0%	8.5%	4.2%	100.0%
Tamborine	9.2%	31.9%	20.8%	20.6%	7.7%	9.8%	100.0%
Tamborine Mountain	21.7%	42.3%	14.1%	13.8%	5.6%	2.5%	100.0%
Balance							
Tamborine – Canungra SA2 Total	18.4%	39.3%	15.7%	15.1%	7.1%	4.3%	100.0%

Source: ABS Census of Population and Housing (2022)

Table 0-5 Number of Bedrooms per Household (%) – Study Areas and SA2s, 2016 and 2021

	2016				2021			
	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Boonah SA2								
Aratula	1.7%	4.0%	56.3%	38.1%	6.3%	5.8%	46.3%	41.6%
Boonah	3.8%	19.4%	45.9%	31.0%	2.7%	17.5%	45.2%	34.5%
Harrisville	0.0%	13.7%	55.0%	31.3%	3.1%	6.8%	50.6%	39.5%
Kalbar	0.0%	13.7%	55.0%	31.3%	3.1%	6.8%	50.6%	39.5%
Mt Alford	6.2%	17.8%	44.2%	31.8%	6.2%	16.0%	47.5%	30.2%
Peak Crossing	2.3%	6.1%	38.9%	52.7%	2.5%	2.5%	35.6%	59.4%
Roadvale	1.9%	14.8%	49.0%	34.2%	2.7%	13.3%	49.5%	34.6%
Warrill View	0.0%	12.9%	42.6%	44.6%	4.9%	14.6%	44.7%	35.9%
Balance								
Boonah SA2 Total	3.5%	13.8%	45.8%	36.9%	3.9%	13.1%	44.3%	38.8%
Beaudesert SA2								
Beaudesert & Gleneagle	5.0%	13.7%	44.9%	36.4%	4.4%	13.7%	40.6%	41.4%
Kooralbyn	9.9%	15.5%	37.1%	37.6%	9.9%	17.5%	33.5%	39.2%
Rathdowney	4.6%	20.0%	44.6%	30.8%	11.3%	12.7%	40.8%	35.2%
Bromelton	4.7%	10.1%	45.0%	40.3%	4.6%	8.5%	43.1%	43.8%
Balance								
Beaudesert SA2 Total	5.3%	13.5%	40.8%	40.4%	5.1%	13.7%	38.9%	42.2%
Tamborine – Canungra SA2								
Beechmont	3.9%	14.0%	44.7%	37.4%	4.4%	10.8%	43.8%	40.9%
Canungra	5.4%	11.7%	45.7%	37.3%	2.8%	9.6%	38.9%	48.8%
Tamborine	1.6%	10.4%	34.1%	53.9%	0.6%	7.1%	24.1%	68.3%
Tamborine Mountain	2.9%	18.7%	49.1%	29.4%	2.1%	14.6%	47.7%	35.6%
Balance								
Tamborine – Canungra SA2 Total	2.6%	14.0%	45.6%	37.7%	2.9%	11.9%	41.9%	43.4%

Source: ABS Census of Population and Housing (2016 & 2022)

Appendix C: Household to Dwelling Projections

Table 0-1 Small, Medium and Large Household Dwelling Projections Business-as-Usual Scenario – Study Areas, SA2s and Scenic Rim LGA, 2021 to 2041

	2021				2026				2031				2036				2041				
	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	
Boonah																					
Aratula	22	84	75	181	25	83	79	186	27	82	82	192	30	81	85	197	33	80	88	202	
Boonah	291	651	497	1,439	304	697	544	1,545	317	743	592	1,651	329	789	639	1,758	342	835	687	1,864	
Harrisville	15	79	62	156	16	90	75	182	17	101	89	207	18	112	102	233	19	123	116	258	
Kalbar	48	205	168	422	54	233	207	494	60	261	246	567	66	289	285	639	71	317	324	712	
Mt Alford	40	85	54	178	41	91	57	189	43	97	59	200	45	104	62	211	47	110	65	222	
Peak Crossing	8	60	99	167	8	67	117	193	8	75	136	219	8	83	154	244	8	90	172	270	
Roadvale	28	87	61	175	30	93	65	187	31	99	69	199	33	105	73	211	35	111	78	223	
Warrill View	24	56	45	125	27	58	44	129	29	61	44	134	32	63	44	139	34	66	43	143	
Balance	313	761	750	1,824	355	828	808	1,992	397	896	866	2,159	438	963	924	2,326	480	1,031	983	2,493	
Boonah SA2 Total	791	2,066	1,811	4,668	860	2,240	1,997	5,097	929	2,415	2,183	5,527	998	2,589	2,369	5,957	1,068	2,763	2,556	6,387	
Beaudesert SA2																					
Beaudesert and Gleneagle	645	1,449	1,477	3,571	806	1,775	1,922	4,503	967	2,101	2,366	5,434	1,127	2,428	2,810	6,365	1,288	2,754	3,255	7,297	
Kooralbyn	215	264	308	788	310	361	441	1,112	405	458	573	1,436	501	554	705	1,760	596	651	838	2,084	
Rathdowney	17	29	25	71	17	29	26	72	17	29	27	73	18	29	28	75	18	29	29	76	
Bromelton	20	65	66	152	22	74	77	173	24	82	88	195	26	91	99	216	28	99	110	238	
Balance	192	442	560	1,195	240	603	690	1,534	288	764	819	1,872	336	925	949	2,211	384	1,086	1,078	2,549	
Beaudesert SA2 Total	1,089	2,250	2,438	5,777	1,396	2,842	3,156	7,393	1,702	3,435	3,873	9,010	2,008	4,027	4,591	10,627	2,314	4,620	5,309	12,243	
Tamborine – Canungra SA2																					
Beechmont	33	95	89	218	34	101	96	232	35	107	104	247	36	113	111	261	37	119	119	275	
Canungra	75	235	295	605	74	243	329	645	73	250	363	685	72	257	397	726	71	264	431	766	
Tamborine	50	158	448	657	48	155	496	698	45	151	543	739	43	148	590	781	40	144	638	822	
Tamborine Mountain	533	1,521	1,137	3,190	534	1,605	1,247	3,387	535	1,690	1,358	3,583	537	1,775	1,469	3,780	538	1,859	1,579	3,976	
Balance	143	361	483	986	170	361	488	1,018	197	361	493	1,050	224	360	498	1,082	251	360	503	1,114	

	2021				2026				2031				2036				2041			
	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total
Tamborine – Canungra SA2 Total	833	2,370	2,452	5,656	859	2,465	2,656	5,980	885	2,559	2,861	6,305	911	2,653	3,065	6,629	937	2,747	3,270	6,953
Scenic Rim LGA	2,714	6,686	6,700	16,100	3,115	7,547	7,809	18,471	3,516	8,408	8,917	20,842	3,917	9,269	10,026	23,213	4,319	10,130	11,134	25,583

Source: Bull & Bear Economics (2022)

Table 0-2 Small, Medium and Large Household Dwelling Projections Policy Intervention Scenario – Study Areas, SA2s and Scenic Rim LGA, 2021 to 2041

	2021				2026				2031				2036				2041			
	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total
Boonah																				
Aratula	22	84	75	181	27	82	78	186	32	80	80	192	36	78	82	197	41	76	84	202
Boonah	291	651	497	1,439	325	685	535	1,545	359	719	573	1,651	393	754	610	1,758	427	788	648	1,864
Harrisville	15	79	62	156	18	89	75	182	20	100	88	207	22	110	100	233	24	121	113	258
Kalbar	48	205	168	422	59	231	205	494	69	256	242	567	79	282	278	639	89	308	315	712
Mt Alford	40	85	54	178	44	89	56	189	49	94	57	200	54	98	59	211	58	103	60	222
Peak Crossing	8	60	99	167	10	67	117	193	11	74	134	219	12	81	151	244	13	89	168	270
Roadvale	28	87	61	175	32	91	64	187	36	96	67	199	39	101	71	211	43	106	74	223
Warrill View	24	56	45	125	27	58	44	129	29	61	44	134	32	63	44	139	34	66	43	143
Balance	313	761	750	1,824	386	813	793	1,992	459	865	835	2,159	532	916	878	2,326	604	968	920	2,493
Boonah SA2 Total	791	2,066	1,811	4,668	927	2,206	1,965	5,097	1,063	2,345	2,119	5,527	1,199	2,485	2,273	5,957	1,335	2,625	2,427	6,387
Beaudesert SA2																				
Beaudesert and Gleneagle	645	1,449	1,477	3,571	806	1,775	1,922	4,503	967	2,101	2,366	5,434	1,127	2,428	2,810	6,365	1,288	2,754	3,255	7,297
Kooralbyn	215	264	308	788	310	361	441	1,112	405	458	573	1,436	501	554	705	1,760	596	651	838	2,084
Rathdowney	17	29	25	71	17	29	26	72	17	29	27	73	18	29	28	75	18	29	29	76
Bromelton	20	65	66	152	24	73	76	173	28	81	86	195	32	88	96	216	36	96	106	238
Balance	192	442	560	1,195	238	604	691	1,534	285	766	821	1,872	331	928	952	2,211	377	1,090	1,082	2,549
Beaudesert SA2 Total	1,089	2,250	2,438	5,777	1,396	2,842	3,156	7,393	1,702	3,435	3,873	9,010	2,008	4,027	4,591	10,627	2,314	4,620	5,309	12,243

	2021				2026				2031				2036				2041			
	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total	Small	Medium	Large	Total
Tamborine – Canungra SA2																				
Beechmont	33	95	89	218	37	100	95	232	40	105	102	247	43	110	108	261	47	115	114	275
Canungra	75	235	295	605	78	241	327	645	81	246	358	685	85	252	389	726	88	257	420	766
Tamborine	50	158	448	657	50	154	494	698	50	150	539	739	50	146	584	781	51	142	629	822
Tamborine Mountain	533	1,521	1,137	3,190	568	1,587	1,232	3,387	603	1,654	1,327	3,583	637	1,720	1,422	3,780	672	1,787	1,518	3,976
Balance	143	361	483	986	185	356	477	1,018	228	350	472	1,050	271	345	467	1,082	313	339	461	1,114
Tamborine – Canungra SA2 Total	833	2,370	2,452	5,656	918	2,438	2,624	5,980	1,002	2,505	2,797	6,305	1,087	2,573	2,970	6,629	1,171	2,640	3,142	6,953
Scenic Rim LGA	2,714	6,686	6,700	16,100	3,240	7,486	7,745	18,471	3,767	8,285	8,790	20,842	4,293	9,085	9,834	23,213	4,820	9,885	10,879	25,583

Source: Bull & Bear Economics (2022)