DRAFT

LAUNCESTON HOUSING PLAN 2025-2040

Project undertaken for City of Launceston

March 2025

Shaping Futures

City of LAUNCESTON

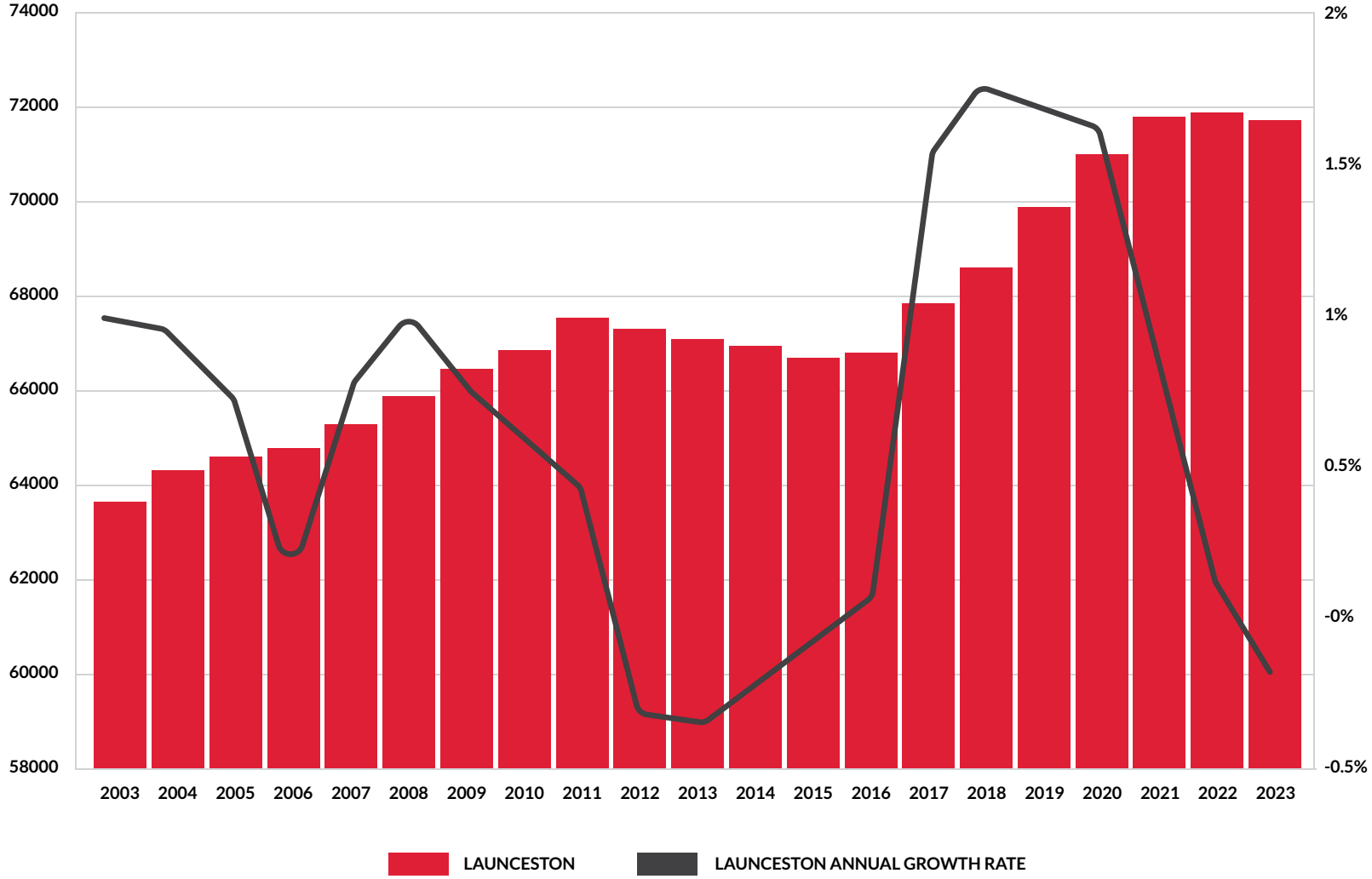
Appendix A – Population and households

Table 1 Greater Launceston Council's Official Estimated Residential Population

REGION	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Launceston	63695	64264	64715	64802	65311	65936	66452	66864	67154	66942	66722	66576	66492	66518	67537	68716	69888	71019	71788	71889	71788
George Town	6713	6760	6755	6755	6762	6779	6829	6872	6857	6831	6838	6854	6857	6873	6914	6958	7020	7186	7206	7267	7330
Meander Valley	18558	18803	18889	19052	19190	19342	19477	19588	19622	19581	19540	19519	19502	19553	19802	20037	20286	20603	21139	21354	21449
Northern Midlands	12209	12324	12422	12561	12568	12593	12638	12675	12729	12739	12765	12819	12873	12972	13132	13362	13492	13661	14022	14137	14279
West Tamar	20869	21254	21454	21700	21925	22122	22420	22647	22833	22798	22851	22921	23007	23092	23600	24091	24602	25123	25717	25931	26039

Source: ABS Regional Population

Figure 1 Population and annual growth rate 2001-2023, Launceston



Source: REMPLAN Community

Table 2 Launceston Service Age Profile

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Pre-schoolers	4025	3950	3926	4001	4057	4234	4329	4393	4248	4333	4267	4200	4073	3977	4000	3984	3964	3975	3964	3905	3828
School age	13140	13193	13167	13096	13149	13235	13212	13011	12859	12728	12648	12557	12447	12402	12398	12462	12495	12539	12458	12487	12434
Tertiary education & independence	4933	5079	5249	5313	5219	5140	5190	5287	5444	5285	5178	5186	5211	5326	5499	5504	5456	5211	5009	4852	4748
Young workers	8794	8785	8676	8515	8520	8548	8620	8745	8789	8740	8680	8586	8625	8623	8956	9520	10138	10726	11368	11353	11240
Parents and homebuilders	12905	13016	13136	13126	13258	13276	13257	13173	13112	12884	12756	12600	12493	12432	12503	12611	12710	12897	12890	13006	13125
Older workers and pre-retirees	7815	7945	8062	8210	8164	8241	8293	8428	8506	8561	8547	8599	8514	8409	8463	8524	8580	8652	8738	8673	8653
Empty nesters and retirees	5174	5307	5525	5595	5937	6178	6417	6582	6829	6965	7165	7230	7321	7424	7405	7528	7630	7769	7824	7955	7971
Seniors	5642	5705	5647	5583	5585	5618	5642	5708	5773	5857	5864	5985	6157	6296	6666	6918	7209	7518	7749	7846	7962
Elderly	1267	1284	1327	1363	1422	1466	1492	1537	1594	1589	1617	1633	1651	1629	1647	1665	1706	1732	1788	1812	1827
TOTAL	63695	64264	64715	64802	65311	65936	66452	66864	67154	66942	66722	66576	66492	66518	67537	68716	69888	71019	71788	71889	71788

Source: ABS Regional Population

Table 3 Persons per dwelling, Launceston

	2011	2016	2021
One person	7,852	8,226	8,696
Two persons	8,783	8,694	9,543
Three persons	3,778	3,706	4,090
Four persons	3,228	3,085	3,404
Five persons	1,257	1,178	1,333
Six persons	386	367	441
Seven persons	96	111	139
Eight or more persons	51	51	82
TOTAL	25,431	25,418	27,728

Source: ABS Census of Population and Housing

Table 4 Housing suitability, Launceston

	2016	2021	2016	2021
Four or more extra bedrooms needed	0	12	0.0%	0.0%
Three extra bedrooms needed	13	16	0.1%	0.1%
Two extra bedrooms needed	101	153	0.4%	0.6%
One extra bedroom needed	555	762	2.3%	2.9%
No bedrooms needed or spare	4,948	5,204	20.7%	19.8%
One bedroom spare	8,749	9,307	36.5%	35.4%
Two bedrooms spare	7,792	8,595	32.5%	32.7%
Three bedrooms spare	1,538	1,915	6.4%	7.3%
Four or more bedrooms spare	259	292	1.1%	1.1%
TOTAL	23,955	26,256	100.0%	100.0%

Source: ABS Census of Population and Housing
Note: figures exclude 'Not stated' and 'Unable to determine' categories.

Table 5 Broad household types and common housing preferences

SINGLE INCOME WITH NO CHILDREN IN THE HOME	DUAL INCOME WITH NO CHILDREN IN THE HOME	YOUNG AND ESTABLISHED FAMILIES	EMPTY NESTERS
These households are typically suited to one- and two-bedroom apartments or smaller townhouses. They are more likely to be renters than other household formations and often exercise a high level of mobility. They comprise about 15% of households in Launceston.	These households typically have higher rental and purchasing power and may or may not be looking to upsize from smaller dwellings into larger homes to have space for a growing family. They comprise about 10% of households in Launceston.	These households are characterised by having dependent children and typically require larger homes with good access to schools, community and social services, and employment opportunities. They comprise about 35% of households in Launceston.	These households once had children in them, but those children have since grown up and are now living independently. Empty Nesters typically would like to remain close to their adult children but might prefer a smaller and more accessible dwelling than the one they occupied as a younger family. In many cases, Empty Nesters continue to occupy larger homes more suited to families with dependent children as their options for downsizing into something suitable are limited and in some cases there are financial incentives to remain in their large home. This is recognised as the plurality household formation in Launceston, with approximately 40% of households being empty nesters.
Example households: - Single people - Young professionals	Example households: - Couples with no children - Adults sharing a house	Example households: - Families with a child or children in childcare - Families with school age child/ren - Intergenerational households	Example households: - Older couples - Retirees - Grandparents
Housing preferences: - Flat or apartment - Townhouses	Housing preferences: - Townhouses - Detached houses	Housing preferences: - Separate houses	Housing preferences: - Flat or apartment - Townhouses

Source REMPLAN.

Table 6 Dwelling type distribution and suitability

DWELLING TYPE	DWELLING TOTAL	DWELLING PERCENTAGE	POPULATION THAT IS SUITED TO THIS DWELLING TYPE	TOTAL % OF POPULATION THAT IS SUITED TO THIS DWELLING TYPE
Separate house	22,246	80.2%	DINK (10%) + Families (35%)	45%
Semi-detached, row or terrace house, townhouse, etc	2,922	10.5%	SINK (15%), DINK (10%), Empty Nesters (40%)	65%
Flat or apartment	2,396	8.6%	SINK (15%), Empty Nesters (40%)	55%
Other	108	0.4%	N/A	N/A

Source: ABS Census of Population and Housing
Note: dwelling totals exclude 'Other' category which includes dwelling types such as caravans, houseboats, etc.

Table 7 Housing Tenure, 2021

HOUSING TENURE	CITY OF LAUNCESTON	REGIONAL TAS
Fully owned	30.6%	38.0%
Mortgage	29.7%	30.4%
Renting - Total	32.8%	23.9%
Renting - Social housing	6.5%	4.6%
Renting - Private	26.1%	19.1%
Other tenure type	1.7%	2.1%

Source: ABS Census of Population and Housing

Appendix B – Labour force and income

Table 8 Quarterly Unemployment Rate

	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4	2024 Q1	2024 Q2	2024 Q3
Launceston	7.4%	7.5%	7.3%	7.4%	6.8%	6.6%	7.1%	8.0%	8.2%	7.8%	6.9%	6.1%	5.3%	5.1%	4.8%	4.0%	4.2%	4.1%	4.4%	4.6%	4.7%	4.6%	4.3%
West Tamar	4.2%	4.3%	4.2%	4.1%	3.7%	3.8%	4.3%	5.0%	5.2%	4.8%	4.1%	3.5%	3.0%	2.9%	2.8%	2.3%	2.4%	2.3%	2.6%	2.7%	2.7%	2.7%	2.6%
Northern Midlands	4.7%	4.8%	4.6%	4.6%	4.2%	4.2%	4.7%	5.4%	5.6%	5.4%	4.7%	4.2%	3.7%	3.6%	3.3%	2.7%	2.8%	2.6%	2.7%	2.8%	2.7%	2.7%	2.7%
Meander Valley	3.8%	4.0%	3.9%	3.9%	3.6%	3.6%	4.1%	4.8%	5.0%	4.8%	4.1%	3.6%	3.1%	3.0%	2.8%	2.4%	2.6%	2.5%	2.7%	2.7%	2.6%	2.5%	2.4%
George Town	10.3%	10.8%	10.7%	10.7%	9.9%	9.4%	10.1%	11.3%	11.6%	11.2%	10.3%	9.3%	8.4%	8.3%	7.8%	6.6%	6.8%	6.6%	6.9%	7.2%	7.2%	7.0%	6.6%

Source: REMPLAN Small Area Labour Force

Table 9 Quarterly Participation Rate

	2019 Q1	2019 Q2	2019 Q3	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4	2024 Q1	2024 Q2	2024 Q3
Launceston	62.8%	62.5%	62.2%	62.1%	62.4%	62.3%	62.8%	63.0%	63.4%	64.3%	64.4%	64.5%	64.5%	64.4%	64.6%	65.2%	65.7%	66.2%	66.0%	65.6%	65.0%	64.4%	64.4%
West Tamar	61.2%	60.9%	60.4%	60.3%	60.4%	60.3%	60.7%	60.8%	61.1%	61.9%	61.9%	61.9%	61.9%	61.8%	62.0%	62.5%	62.9%	63.3%	62.9%	62.4%	61.8%	61.3%	61.3%
Northern Midlands	61.6%	61.3%	60.8%	60.6%	60.8%	60.7%	61.2%	61.4%	61.6%	62.4%	62.4%	62.4%	62.4%	62.3%	62.5%	63.0%	63.5%	63.9%	63.6%	63.1%	62.5%	61.8%	61.8%
Meander Valley	61.8%	61.5%	61.1%	61.0%	61.1%	61.0%	61.4%	61.6%	61.9%	62.7%	62.7%	62.6%	62.7%	62.5%	62.8%	63.3%	63.6%	63.9%	63.5%	62.9%	62.4%	61.9%	61.9%
George Town	50.9%	50.6%	50.3%	50.1%	50.2%	50.1%	50.3%	50.2%	50.6%	51.2%	51.2%	51.3%	51.3%	51.2%	51.3%	51.8%	52.2%	52.7%	52.5%	52.1%	51.6%	51.0%	51.0%

Source: REMPLAN Small Area Labour Force

Appendix C – Housing supply and development trends

Table 10 New dwelling approvals by suburb

SUBURB	CATEGORY	2019	2020	2021	2022	2023	2024	TOTAL
Dilston	Balance	1	1	0	2	0	1	5
East Launceston	Established area	0	3	1	3	1	3	11
Invermay (Tas.)	Established area	1	1	3	3	10	2	20
Karoola	Balance	0	2	0	0	0	0	2
Kings Meadows	Growth area	5	37	23	20	7	10	102
Lalla	Balance	0	2	0	0	1	0	3
Launceston	Established area	0	9	16	2	2	4	33
Lebrina	Balance	0	4	0	1	1	0	6
Lilydale (Tas.)	Balance	0	2	4	5	9	3	23
Mayfield (Tas.)	Established area	0	8	0	3	3	2	16
Mowbray (Tas.)	Established area	0	6	13	6	38	10	73
Newnham	Established area	2	16	9	17	9	5	58
Newstead (Tas.)	Established area	3	10	22	14	9	9	67
Norwood (Tas.)	Established area	1	9	5	4	0	0	19
Nunamara	Balance	0	4	1	2	1	0	8
Patersonia	Balance	0	0	0	1	0	0	1
Prospect (Tas.)	Growth area	2	2	3	3	2	2	14
Punchbowl (Tas.)	Established area	6	6	9	3	1	2	27
Ravenswood (Tas.)	Established area	1	37	11	17	7	14	87

Source: City of Launceston (Compiled by REMPLAN)

SUBURB	CATEGORY	2019	2020	2021	2022	2023	2024	TOTAL
Relbia	Balance	3	4	4	1	1	3	16
Rocherlea	Established area	0	0	0	6	44	2	52
South Launceston	Established area	1	8	13	10	11	7	50
St Leonards (Tas.)	Growth area	12	16	17	15	7	16	83
Summerhill	Established area	2	19	19	7	3	7	57
Swan Bay (Tas.)	Balance	1	14	11	5	3	8	42
Tayene	Balance	0	1	0	0	0	0	1
Trevallyn	Established area	0	3	2	2	0	1	8
Turners Marsh	Balance	0	1	0	1	0	2	4
Underwood (Tas.)	Balance	0	1	2	1	2	0	6
Waverley (Tas.)	Established area	0	1	4	3	5	5	18
West Launceston	Established area	1	11	12	7	6	6	43
White Hills (Tas.)	Balance	0	1	0	0	0	0	1
Windermere (Tas.)	Balance	0	1	1	0	0	1	3
Youngtown	Growth area	13	60	70	93	52	29	317
	TOTAL	55	300	275	257	235	154	1276

Table 11 Dwelling structure, Launceston

	2001	2006	2011	2016	2021
Separate house	21,760	22,493	23,534	23,424	24,551
Medium density	4,486	4,731	5,107	5,883	6,243
High density	226	205	207	327	193
Other	213	121	136	126	131
Caravan, cabin, houseboat	67	75	90	60	79
Not stated	249	3	24	104	83
TOTAL	27,001	27,628	29,098	29,924	31,281

Source: ABS Census of Population and Housing

Table 12 Number of bedrooms in private dwellings, Launceston

	2006	2011	2016	2021
None (includes bedsitters)	99	81	100	91
1	1,494	1,621	1,574	1,578
2	5,593	5,848	5,819	6,278
3	12,930	13,112	12,762	13,846
4	3,282	3,718	3,968	4,586
5 or more	743	856	875	1,090
Not stated	1,316	1,164	2,073	1,498
	25,457	26,400	27,171	28,968

Source: ABS Census of Population and Housing

Table 13 Year of construction by dwelling type, Launceston

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Dwelling	106	79	161	79	135	144	134	128	117	62	117	102	113	111	124	93	95	87	182	85	153
Flat/s	0	0	0	2	1	2	0	0	6	5	5	4	0	0	0	4	6	2	1	0	18
Unit/s	39	7	12	10	7	19	5	2	15	9	9	2	1	4	4	4	6	14	1	12	46
Villa units	4	7	31	27	80	63	53	33	39	64	67	38	56	41	83	43	41	78	109	35	51
Conjoined Units	5	2	4	8	19	24	8	7	6	13	12	9	5	16	10	18	16	14	0	2	13
Multiple storey units	0	0	0	33	13	26	3	0	8	1	3	1	3	1	0	0	0	0	0	2	0
Dwelling & flat/s	0	2	0	0	0	0	0	2	0	0	9	2	6	7	4	2	2	2	2	3	0
Rural Residential	18	11	42	9	15	8	17	16	17	21	11	29	13	23	10	22	8	11	27	21	5
TOTAL	172	108	250	168	270	286	220	188	208	175	233	187	197	203	235	186	174	208	322	160	286

Source: Northern Tasmania Residential Supply and Demand Study, 2024

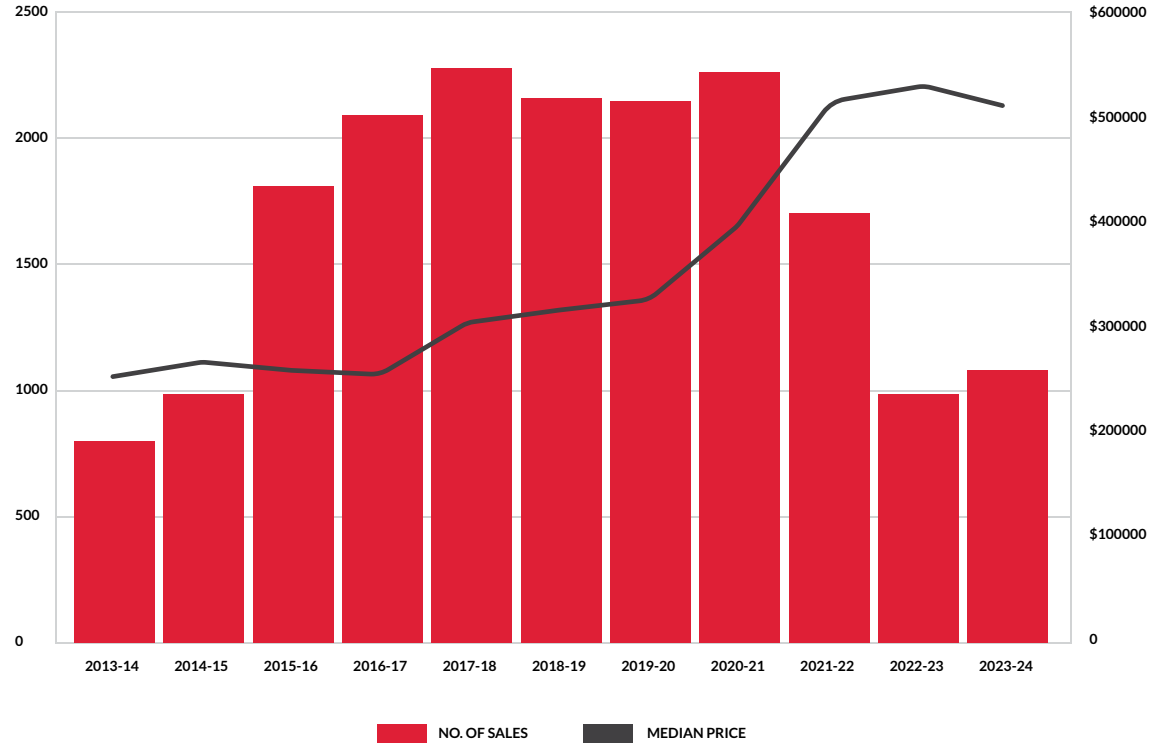
Appendix D – Housing and affordability

House and Unit Sales

Launceston's housing market has experienced changes over recent years, with prices for both purchases and rentals increasing significantly. This has increased housing stress for many Launceston residents, and the new housing being developed is not necessarily suited for the emerging demographic profile.

Over the past 10 years, Launceston's housing market peaked in 2017-18 with 2,276 house sales at a median price of $310,000. Since then, the number of sales has dropped to 1,080 in 2023-24, while the median price has risen to $533,300. The median price has remained relatively stable since 2021-22, when it increased to $535,000, up from $410,000 in 2020-21.

Figure 2 Median weekly rent, houses, 2013-2024, Launceston



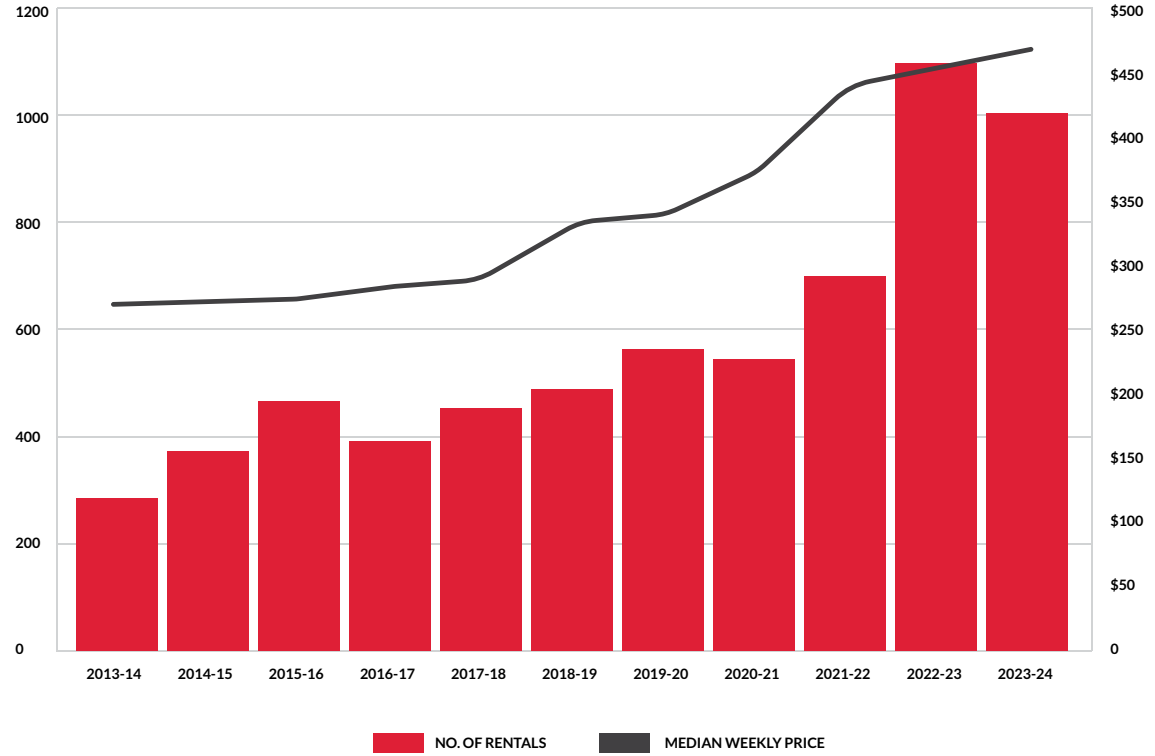
Source: REMPLAN Housing

House Rentals

The number of house rental listings in Launceston steadily rose from 271 in 2013-14 to 700 in 2021-22, followed by a significant 59.3% jump to 1,115 listings in 2022-23. This figure slightly declined to 1,005 in 2023-24, marking a total increase of 270.8% from 2013-14 to 2023-24.

Over the same period, the median weekly rent increased gradually from $275 to $470, reflecting a 70.9% rise.

Figure 3 Median weekly rent, houses, 2013-2024, Launceston

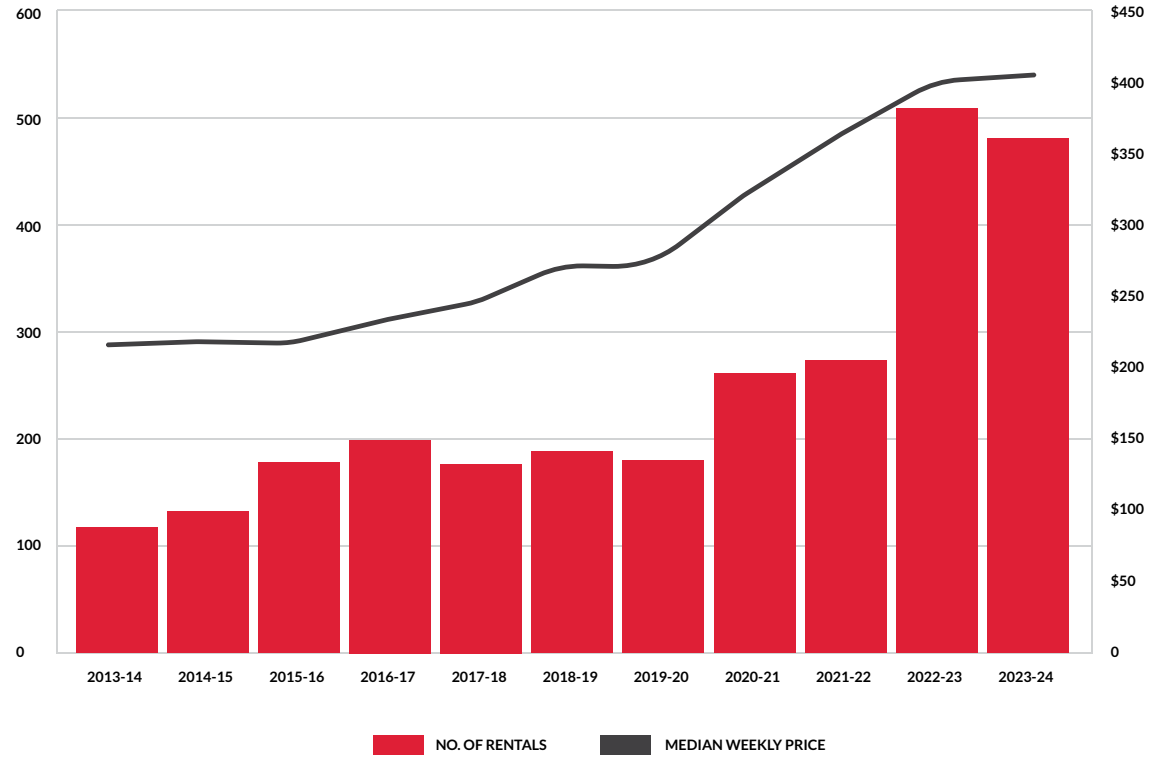


Source: REMPLAN Housing

Unit Rentals

Unit rental listings in Launceston followed a similar trend to houses, with a significant increase from 280 in 2021-22 to 510 in 2022-23, followed by a slight decline to 489 in 2023-24. Like house rentals, the median weekly rent for units gradually rose from $215 in 2013-14 to $400 in 2023-24, reflecting a higher growth rate of 86.0%.

Figure 4 Median weekly rent, units, 2013-2024, Launceston



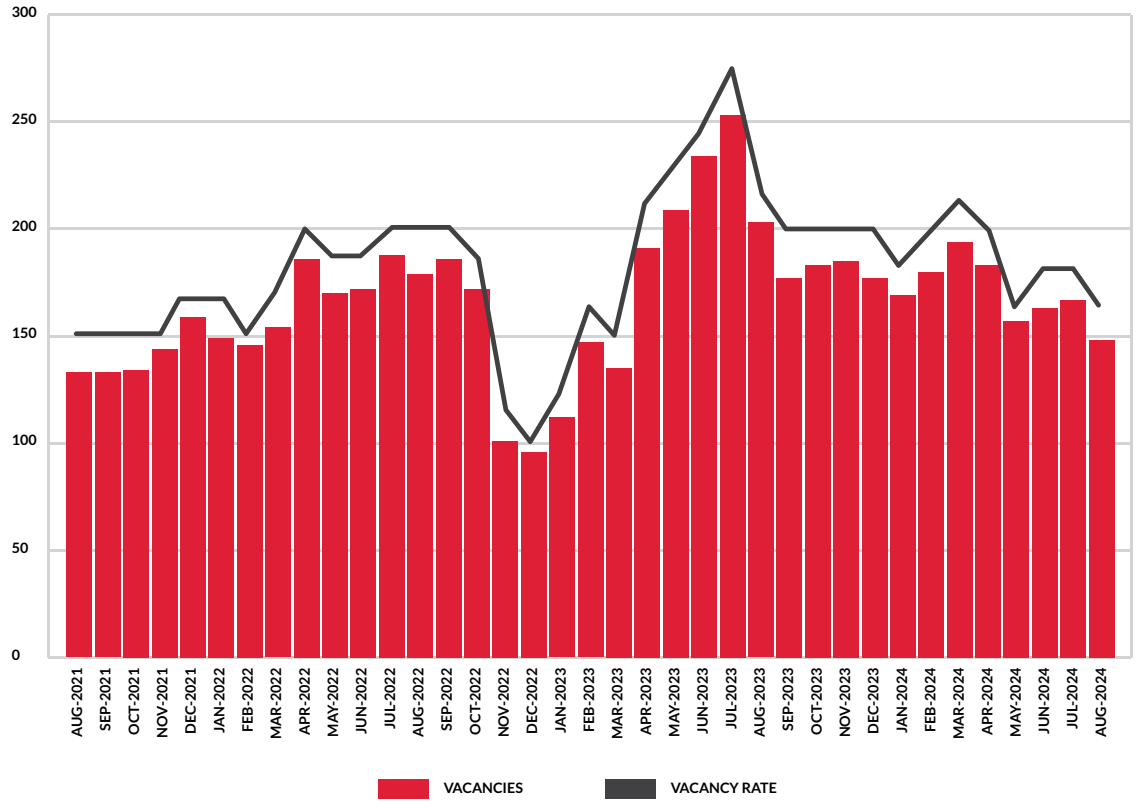
Source: REMPLAN Housing

Rental Vacancies

In August 2024, there were 148 rental vacancies in Launceston, down from 167 in July, marking the lowest number since March 2023. The vacancy rate dropped to 1%, slightly down from 1.1% in July, and from 1.3% in August 2023.

Rental vacancies in Launceston peaked in July 2023, with 253 vacancies and a 1.7% vacancy rate. The lowest number of vacancies occurred in December 2022, with 96 vacancies and a rate of 0.6%.

Figure 5 Rental vacancy rates 2021-2024, Launceston



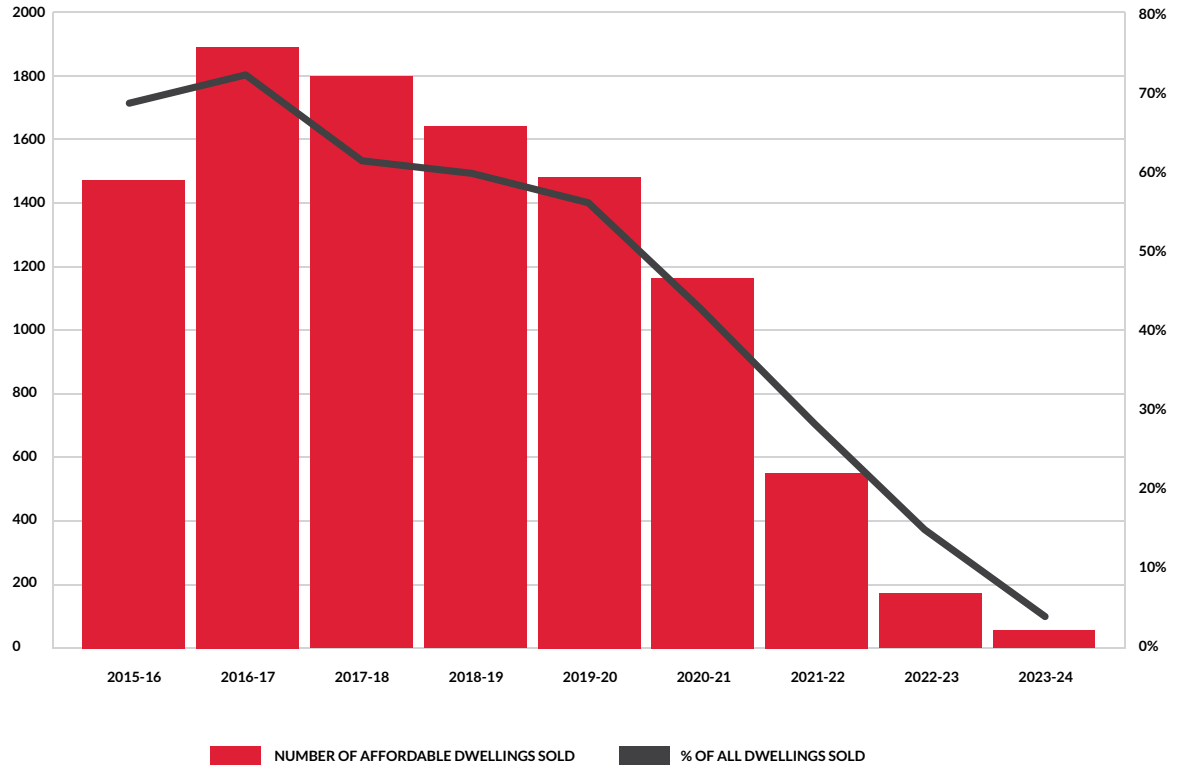
Source: SQM Research

Housing Affordability

The term 'housing affordability' refers to the relationship between the expenditure on housing and household incomes as a way to reflect potential barriers for entry into the housing market. The number of dwellings that are affordable has a strong relationship with income. A dwelling is considered to be unaffordable if the asking price for sale or rent is more than 30% of household income. The lower household incomes are, the fewer homes that are considered to be affordable to rent or buy.

In 2015-16 there were 1,472 affordable dwellings sold in Launceston, representing 69% of all dwellings sold. By 2023-24 this had decreased to 56 affordable dwellings sold, representing 4% of all dwellings sold. These higher prices and lower sale numbers reflect a strained housing market, highlighting the need for more affordable housing options.

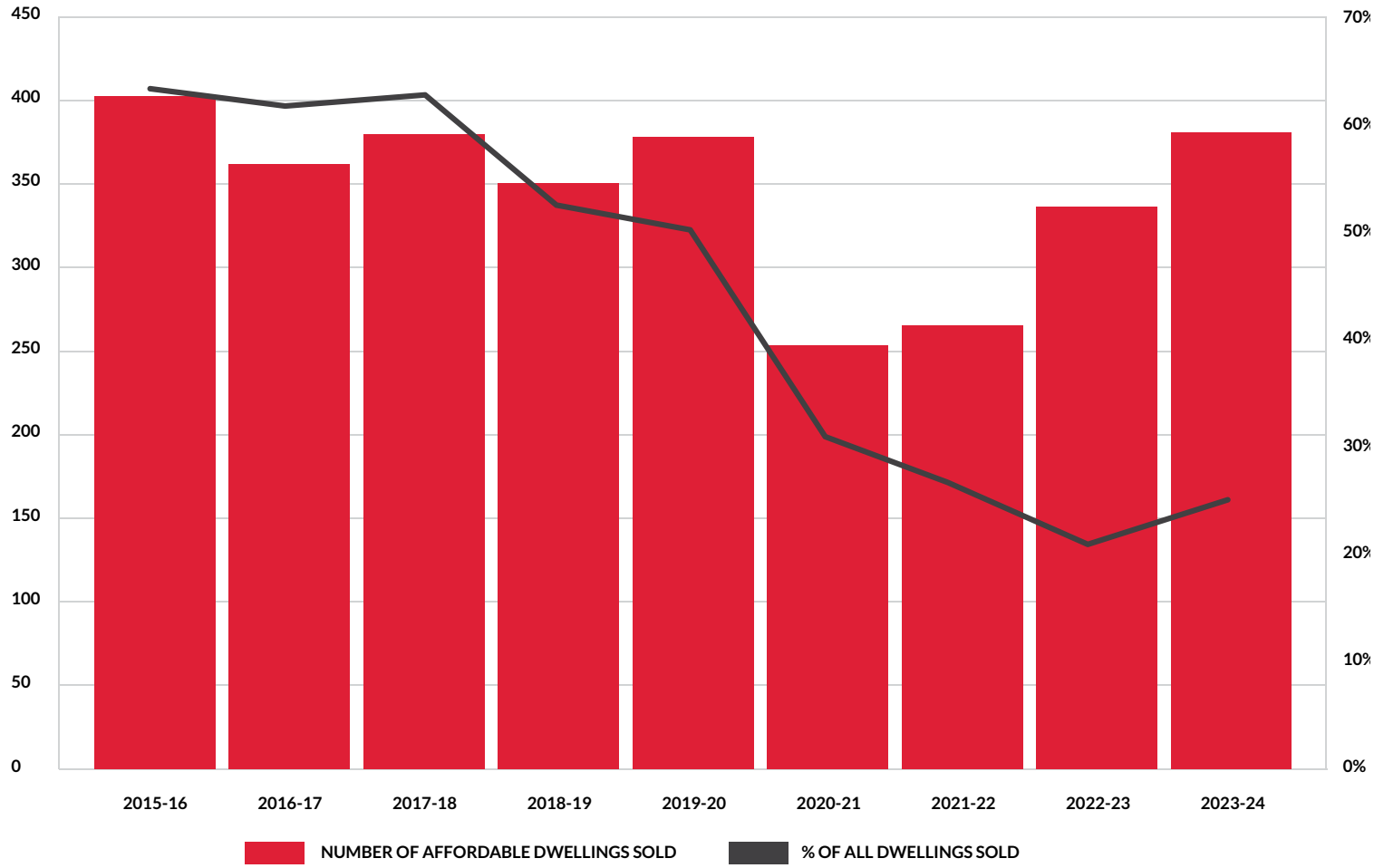
Figure 6 Affordable housing sales 2015-2024, Launceston



Source: REMPLAN Housing

In 2015-16, there were 403 affordable rentals in Launceston, representing 63% of all rentals. This decreased to 374 affordable rentals in 2023-24, representing 25% of all rentals.

Figure 7 Affordable rentals 2015-2024, Launceston



Source: REMPLAN Housing

Appendix E – Housing supply and development trends

Table 14 New dwelling approvals

LAUNCESTON	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
New Houses	133	183	157	171	180	264	253	365	210	198	237
New Other Residential	65	31	109	20	38	24	12	28	43	20	8
TOTAL	**198**	**214**	**266**	**191**	**218**	**288**	**265**	**393**	**253**	**218**	**245**
Annual change in total		8%	24%	-28%	14%	32%	-8%	48%	-36%	-14%	12%
West Tamar	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**	**2021-22**	**2022-23**	**2023-24**
New Houses	133	183	157	171	180	264	253	365	210	198	237
New Other Residential	65	31	109	20	38	24	12	28	43	20	8
TOTAL	**198**	**214**	**266**	**191**	**218**	**288**	**265**	**393**	**253**	**218**	**245**
Annual change in total		25%	-9%	-41%	53%	-18%	33%	57%	-35%	-25%	2%
Meander Valley	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**	**2021-22**	**2022-23**	**2023-24**
New Houses	133	183	157	171	180	264	253	365	210	198	237
New Other Residential	65	31	109	20	38	24	12	28	43	20	8
TOTAL	**198**	**214**	**266**	**191**	**218**	**288**	**265**	**393**	**253**	**218**	**245**
Annual change in total		36%	4%	-34%	50%	-25%	30%	82%	-18%	-23%	16%

Source: ABS Building Approvals, Australia

Table 15 New dwelling approvals, public sector vs private sector, Launceston

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25 YTD	AVERAGE 2020-2024
Private sector	262	373	229	184	219	72	253
Public sector	3	20	24	34	26	2	21
Total	**265**	**393**	**253**	**218**	**245**	**74**	**275**
Private share	99%	95%	90%	82%	88%	97%	92%
Public share	**1%**	**5%**	**9%**	**16%**	**11%**	**3%**	**8%**

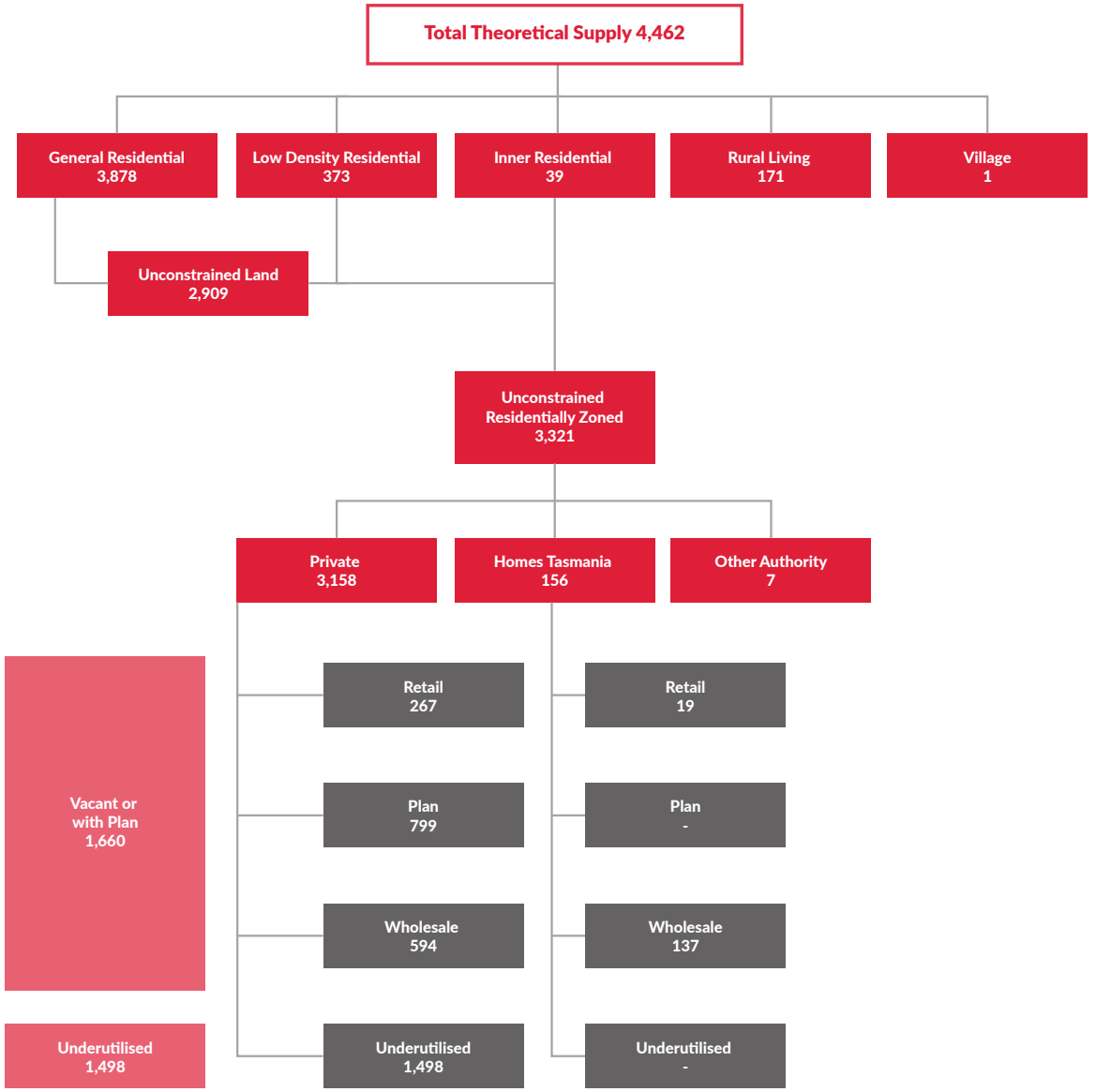
Source: ABS, Building Approvals by Local Government Area
Note: 2024-25 includes data from July to October. Total values will differ from those listed in Table 10 as data is from different sources and taken for different geographic areas.

Appendix F – Land supply

The land supply summary approach outlined below ("RDSS Land Supply Approach Summary") has been taken directly from the Northern Tasmania Residential Demand and Supply Study 2024 (RDSS). The land supply assessment was completed utilising data from August 2023. Land supply estimates for this project have utilised the figures from the RDSS but updated by:

- Removing yield for sites with dwelling approvals since 2023.
- Addition of estimated yields for new Neighbourhood Plan areas that are outside existing residentially zoned land.

The resulting yield assessment was then filtered and categorised as per the adjacent flow chart to determine final amount of developable land that used as a basis for this study.



Source: Northern Tasmania Residential Demand and Supply Study 2024

RDSS Land Supply Approach Summary

Land The customised spatial database provided by the Department of Natural Resources and Environment forms the base of the supply analysis. The database is provided at a parcel level, but with key data provided at the property level, consistent with the ratings database (a property can contain one or more parcels).

Where properties are classified as vacant, all parcels are retained as separate features in the analysis. Non-vacant properties with multiple parcels were merged into a single feature for the purpose of later analysis. Manual reviews were undertaken to determine whether vacant parcels could be separated from occupied multi-parcel properties, such as utilising building footprint layers, however the outcomes were not reliable. Ultimately, the merging of occupied multi-parcel properties into single features had negligible impact on overall outcomes as larger properties were calculated as being capable of subdivision (back into similar number of parcels).

The spatial layer was clipped to residential zones of respective planning schemes being, General Residential, Inner Residential, Low Density Residential, Rural Living, and Village. The analysis did not include any Future Urban zoned land. At the time of the final analysis, Break O'Day and George Town had the Interim Planning Scheme in force. However, at the time of writing this report, both councils had transitioned to the Tasmanian Planning Scheme. As zoning changes were mainly translated like for like, the main change was through the application of code overlays in the Tasmanian Planning Scheme. The supply analysis was rerun just prior to the issuing of this report using the new Tasmanian Planning Scheme and the difference in yields was 50 less for George Town and 300 more for Break O'Day in the update using the Tasmanian Planning Scheme zones and overlay constraints. Analysis was undertaken on a range of subdivisions to determine an average development takeout rate that accounts for the proportion of land required to provide for services, roads/driveways, and the like. Based on a review of a broad range of subdivisions of various scales across municipalities, takeout rates generally ranged between 15-30% and averaged around 20%. The 20% figure was applied as a standard takeout rate for all calculations of yields from land deemed to have further subdivision potential except for land in the Rural Residential Zone.

Several geography attributes were joined to each feature in the spatial database which are used to calculate average yields and categorise and calculate supply. This included geographies such as official suburbs, RLUS settlement types, as well as the assessment areas from this project. Land that was serviced and unserviced by TasWater was also identified in this step using TasWater's Sewer Serviced Land spatial dataset.

A building to land area ratio was calculated for each parcel. This ratio was used in later steps to identify whether residential land that was already developed with a dwelling met a threshold to be categorised as 'underutilised'.

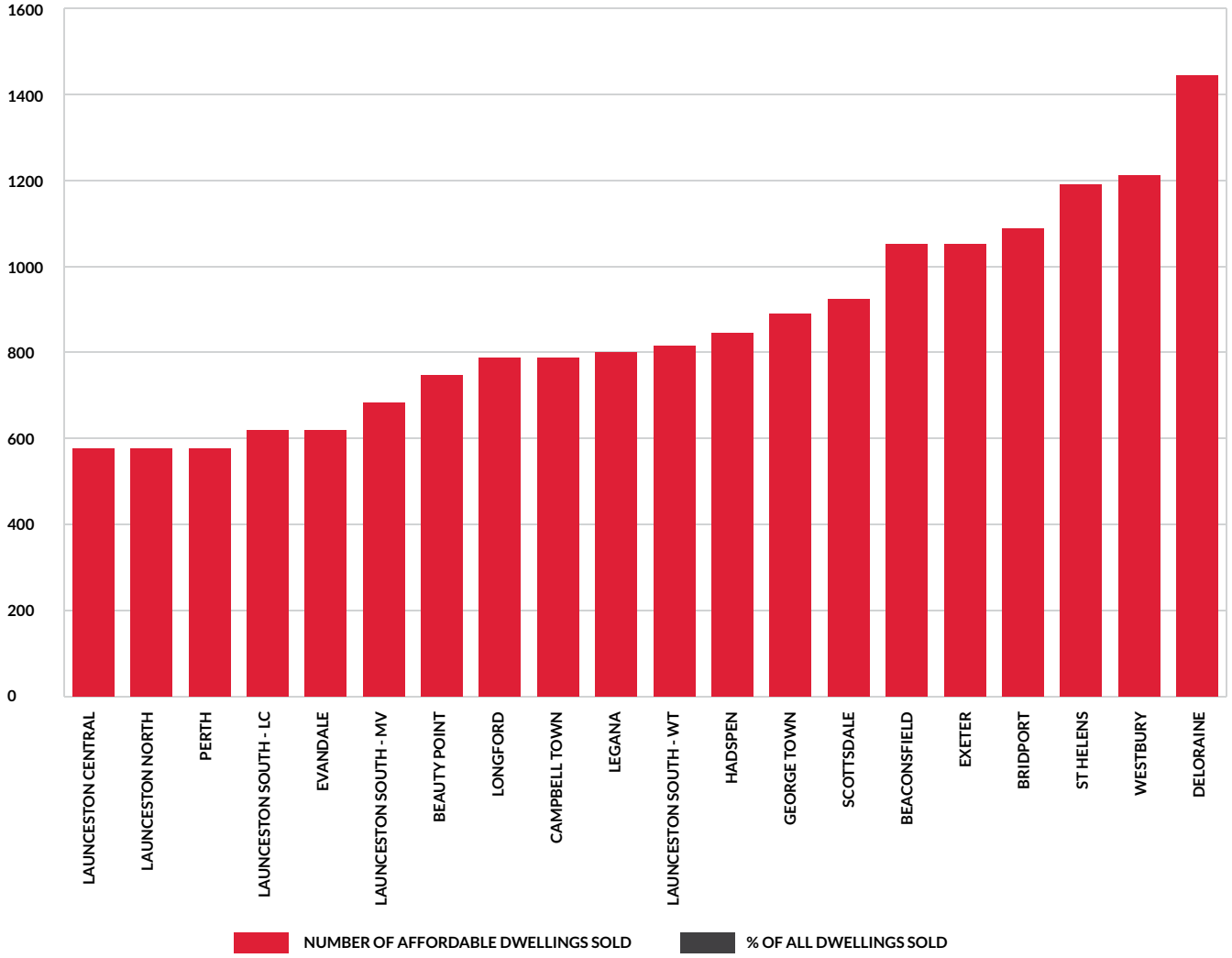
Minimum land areas were calculated for each zone to identify the minimum size that currently accommodates a dwelling on a freehold title. The minimum land area figure was used in the calculation of average yields and in the classification of land. In the calculation of average yields, any parcels that were below the minimum land area for a respective zone was excluded from the calculation. This approach removed outliers and feature slivers that may reduce average yields in certain areas. In the classification of land, any parcels below the minimum land area in a given zone was allocated as unavailable.

A land classification was applied based on a range of criteria specific to each land use zone. The three classifications were:

- Vacant: any land which had a VISTAS land use classification of 'Vacant' and was above the minimum land area in a given zone.
- Underutilised: underutilised land were properties currently occupied and allocated a residential land use under VISTAS but were of sufficient size and a low building to land area ratio to suggest underutilisation. Building to land area ratios were less than 5% (i.e. the buildings take up less than 5% of the properties land area) and the land was at least 5,000 sqm in area in the village and general residential zones. In the inner residential zone a 20% building to land area ratio and 3,000sqm land area was utilised to capture higher densities desired in this zone. In the Low Density Residential Zone a 2.5% building to land area ratio and a 1ha land area was applied. Parcels and properties with an underutilised classification were considered to have future subdivision potential and included in yield calculations.
- Unavailable: any land which did not meet the criteria above was allocated as unavailable. These included smaller or standard residential parcels which had dwelling improvements, any road casements, as well as any land given a non-residential land use classification in VISTAS, excluding agricultural uses in certain scenarios. This exclusion of non-residential land uses excludes uses such as parks, sports centres, commercial uses, churches, and police stations in all scenarios. In the 'theoretical' supply, all agricultural land uses are included however under the 'practical' supply scenario, higher value agricultural land uses were excluded. Exclusions applied to land uses such as nurseries, aquaculture and vineyards but did not apply to grazing or cropping land.

Average dwelling yields were calculated across the region which were then applied to individual parcels and properties. The process for yield calculation utilises the size of a land parcel which has had a dwelling constructed on it. This is therefore a dwelling yield and not a subdivision yield as it accounts for factors such as strata titling and resubdivision of land that is not typically accounted for when yields are based on average lot size of recent subdivisions. The process to calculate average yields was based on the specific settlement type and land use zone for each municipality. This provides a realistic estimate of dwelling yields based on regional and localised market factors. An example of the outcome of this approach is that different yield figures are applied in the general residential zone in Trevallyn compared to Riverside, which are different again for Legana or Exeter. As the supply analysis will be regularly updated, this approach will also capture changes in dwelling densities over time. The chart below illustrates the variation in average yields in the General Residential zone across the region.

Figure 8 Average yields (sqm / dwelling) in the General Residential Zone by assessment area.



Source: Northern Tasmania Residential Demand and Supply Study 2024

In some instances in the low density and rural living zones, the average yield calculations are lower than the permitted minimum lot sizes. To address this, minimum subdivision sizes as specified in respective planning schemes are utilised instead of average yield calculations.

Development constraints are identified through overlays within respective planning schemes. Code overlays (and their equivalents in Interim Planning Schemes) were workshopped with the Regional Planners Group. Constraints do not limit the potential for a single dwelling to be constructed on an existing vacant parcel. The application of constraints does reduce the area of land available for subdivision in final yield calculations. Constraints include flooding, landslip, coastal erosion and inundation, certain natural assets, and electricity transmission infrastructure. An additional constraint slope constraint was also applied across the region where the slope of land was greater than 15%.

This value was chosen upon review of numerous subdivisions as well as a qualitative assessment of construction cost estimates which indicated that 15% slope was a point where costs increased significantly, thereby becoming a constraint on development.

A final step before final yields were calculated is the input from individual councils. These were identified in one-on-one workshops with respective councils as well as detailed written feedback, mostly focussing on larger properties that may significantly impact supply. The process generally included a review of the application of Specific Area Plans, any large subdivisions that should be considered and not yet captured, decisions for refusal, and major impediments to development that are not identified in planning schemes but may have been identified through planning permit processes.

Final yields were calculated at a parcel/property level accounting for constraints, development take outs and average yields.

Appendix G – How we will grow

Table 16 Population forecast scenarios, Launceston

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
90% upper	75129	75978	76816	77651	78476	79262	80018	80758	81486	82194	82891	83582	84278	84974	85675	86368
50% upper	74409	75076	75733	76390	77040	77654	78244	78822	79392	79946	80493	81037	81589	82143	82705	83261
Central forecast	73909	74449	74980	75513	76041	76537	77011	77476	77937	78384	78826	79268	79720	80176	80641	81102

Source: REMPLAN Forecast

Note: Forecasts were prepared in 2023. Figures have been rebased to zero in 2024, however no other modifications have been made to assumptions or inputs.

Table 17 Forecast households (Central forecast), Launceston

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Couple family with children	6,923	6,967	6,999	7,030	7,054	7,077	7,096	7,114	7,126	7,149	7,170	7,191	7,215	7,230	7,248	7,268
Couple family with no children	7,893	7,993	8,090	8,189	8,284	8,377	8,468	8,549	8,640	8,724	8,806	8,884	8,960	9,045	9,126	9,197
One parent family	3,822	3,849	3,878	3,903	3,927	3,952	3,974	3,995	4,016	4,035	4,054	4,074	4,096	4,113	4,130	4,151
Other family	284	285	290	294	293	296	296	300	302	301	307	307	309	311	314	314
Lone person household	9,327	9,474	9,626	9,771	9,924	10,070	10,221	10,367	10,508	10,647	10,773	10,906	11,033	11,165	11,290	11,419
Group household	1,153	1,146	1,145	1,144	1,147	1,151	1,150	1,156	1,157	1,160	1,170	1,175	1,179	1,185	1,189	1,192
Multiple family	702	706	706	710	713	713	714	718	722	725	724	728	730	730	734	737
TOTAL	**30,104**	**30,420**	**30,734**	**31,041**	**31,342**	**31,636**	**31,919**	**32,199**	**32,471**	**32,741**	**33,004**	**33,265**	**33,522**	**33,779**	**34,031**	**34,278**

Source: REMPLAN Forecast

Note: Forecasts were prepared in 2023. Figures have been rebased to zero in 2024, however no other modifications have been made to assumptions or inputs.

Table 18 Forecast dwelling requirement scenarios, Launceston LGA

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040
Forecast	340	683	1,023	1,356	1,682	1,999	2,304	2,605	2,898	3,189	3,473	3,754	4,031	4,308	4,580	4,847
50% upper	560	960	1,357	1,746	2,127	2,498	2,857	3,210	3,554	3,895	4,228	4,557	4,881	5,204	5,522	5,834
90% upper	877	1,359	1,837	2,307	2,768	3,217	3,652	4,080	4,497	4,910	5,314	5,712	6,104	6,494	6,877	7,254

Source: REMPLAN
Note: Forecasts were prepared in 2023. Figures have been rebased to zero in 2024, however no other modifications have bene made to assumptions or inputs.

Table 19 Current dwelling profile versus potential dwelling profile to better suit household types

FORECAST REGION	CURRENT			2040		
	Detached	Missing middle	High density	Detached	Missing middle	High density
Northern	65%	32%	2%	31%	55%	14%
Central	79%	21%	0%	33%	67%	0%
Outer	85%	15%	0%	34%	66%	0%
Balance	100%	0%	0%	100%	0%	0%

Notes: 'Current' figures are derived from ABS 2021 Census of Population and Housing (Dwelling Structure) but excludes 'not stated' and forms of temporary housing. '2040' figures are based on an assessment of household characteristics and which type of housing they would be suited to. E.g. assumes all lone person households would be best suited to 'missing middle', or 75% of 'group households' would be suited to 'missing middle' while 25% would be suited to a detached dwelling.

City of
LAUNCESTON